



TOURISM AND THE WILDLIFE ECONOMY IN AFRICA

An International Centre for Responsible Tourism global (ICRT global) White Paper

Wildlife, conservation and nature positive tourism has featured in the WTM Africa programme from the beginning. This year we have a major panel on “Tourism and the Wildlife Economy”. This paper places tourism in the context of the other ways in which humans secure revenues from wildlife, consumptive and nonconsumptive. There is a pressing need to increase revenues for the local communities who bear the opportunity and other costs of living with wildlife and the resources necessary to manage the conservation of habitats and species across Africa



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Contents

Introduction: Wildlife as an economic asset	3
What is the “wildlife economy”?	4
The importance of diversity for a resilient and sustainable wildlife economy	6
Embracing the full definition of tourism to enhance diversity and resilience	7
Photo-tourism and hunting tourism as complementary elements of the wildlife economy	10
Towards more resilient wildlife economies supported by responsible tourism	11

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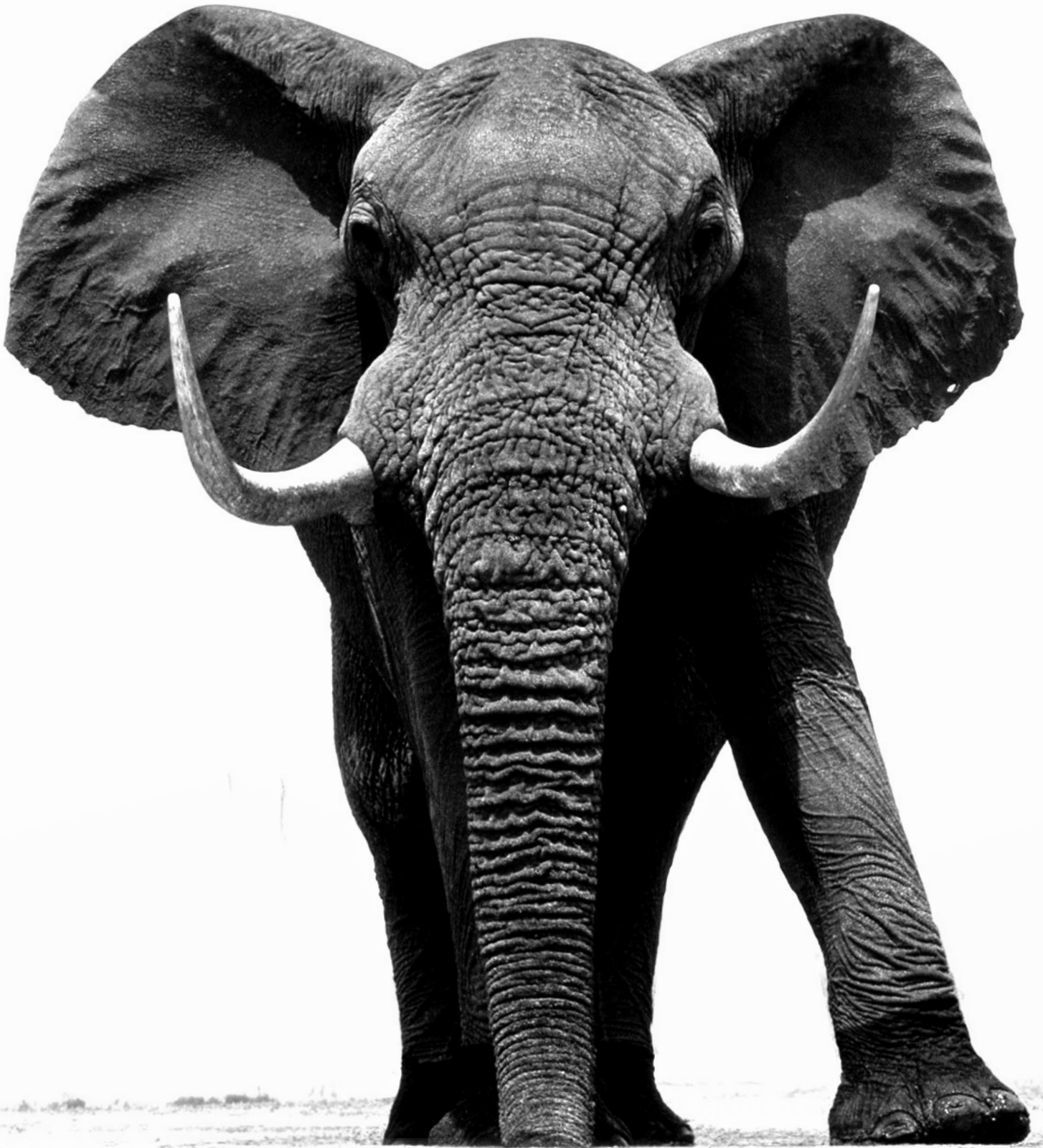
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Professor Emeritus Harold Goodwin is the founder of the International Centre for Responsible Tourism Global. Harold has a background of years of research on Tourism, Conservation and Sustainable Development and the development and delivery of an MSc in Tourism and Conservation. In 2002 he co-chaired the Cape Town Conference on Responsible Tourism in Destinations and drafted the conference declaration, the 2002 Cape Town Declaration on Responsible Tourism, the founding document of the Responsible Tourism Movement, MScs in Responsible Tourism followed, in 2004. The World Responsible Tourism Awards were launched and they continue to be chaired by Harold.

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wildlife

as an economic asset



It has long been recognised that wildlife is - or has the potential to be – an economic asset. Over four decades ago, a report¹ was published highlighting the economic contributions of wild animals and plants to developing countries in the form of meat, medicines, fuel and so on.

Since then, the value of biodiversity and its role in economic development has been increasingly recognised - particularly for countries in the Global South. For example, countries such as South Africa, Senegal, Morocco, Ghana, and Zambia have developed natural capital accounts (NCAs) with many others in the process of developing and piloting NCAs as well.

South Africa has is developing a Biodiversity Economy Satellite Account to ensure that the value of biodiversity and the related wildlife economy activities are captured in national reporting.²

What the 1982 report didn't explore (although there has been considerable research done on this since then) was the service industries that can be based on wildlife and used to generate income, jobs, financing for protected areas and GDP earnings.

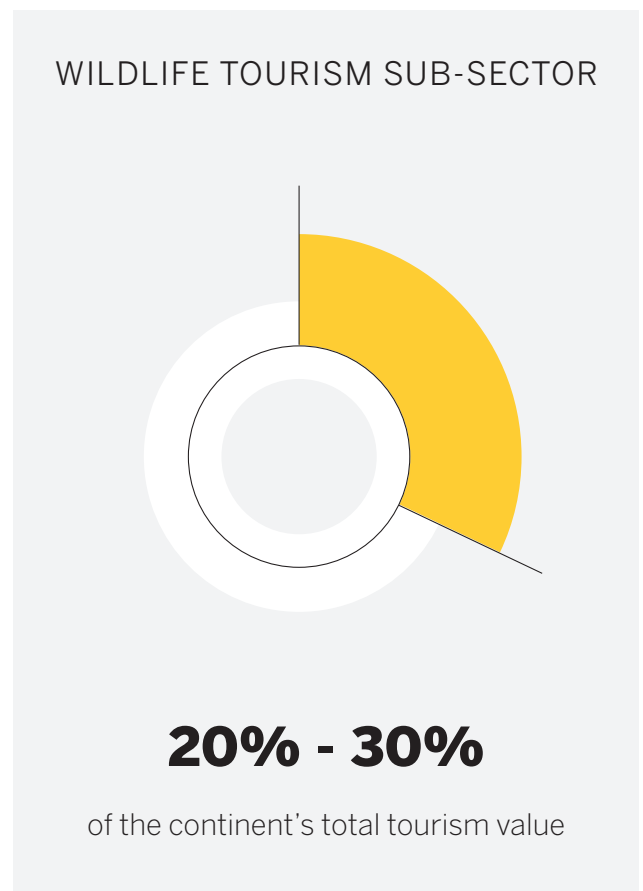
Tourism is the most prominent of those industries, particularly in Africa. According to the World Tourism Organization (WTO), in 2024³. Africa's tourism sector contributed over USD 168 billion to continental GDP, representing 8.5% of total economic output.

Total export revenues from international tourism were worth USD 52 billion in 2024, accounting for 41% of Africa's total service exports and 7.7% of the continent's total exports of goods and services⁴. [It is important to note that a large portion of the formal tourism sector is focused in only a few countries, such as Morocco, Egypt and South Africa.]

The wildlife tourism sub-sector generates between 20–30% of the continent's total tourism value, depending on region – with particularly high values associated with “Big Five” safari tourism but also significant marine wildlife tourism activities. A large portion of this is focused in Eastern and Southern Africa.

Tourism is thus a key component of Africa's “wildlife economy” – an emerging concept gaining increasing traction across the continent.

This paper explores the role of tourism within the wildlife economy, highlighting the need to consider a broader concept of tourism, beyond purely non-consumptive tourism, as well including other income generating opportunities as key elements of the responsible tourism product, for example the production and consumption of game meat (from ranching, hunting or culling) and the utilisation of forest products such as local honey and coffee in tourism businesses.



¹Prescott Allen, R., & PrescottAllen, C. (1982). What's wildlife worth? Economic contributions of wild plants and animals to developing countries. Earthscan / International Institute for Environment and Development ² https://www.wavespartnership.org/sites/waves/files/images/3b6_Grobler_South%20Africa%20th%20NCA%20Policy%20Forum.pdf ³World Tourism Organization (2025). Regional Report – Tourism Investment Trends and Opportunities in Africa. UN Tourism, Madrid. DOI: <https://doi.org/10.18111/9789284426997> ⁴It is important to note that a large portion of the formal tourism sector is focused in only a few countries, such as Morocco, Egypt and South Africa.

what is

the wildlife economy

In the last decade an increasing number of countries have started to formally recognise the potential for biodiversity to drive local, national and regional economic development and the concepts of “wildlife economy” and “biodiversity economy” have gained traction, notably in Africa.

South Africa was the first country to formalise this recognition in the shape of a national strategy. In 2015, the South African government approved a National Biodiversity Economy Strategy (NBES) with the intention to “optimise biodiversity-based business potentials across the terrestrial, fresh water, estuarine, and marine and coastal realms, and to contribute to economic growth with local beneficiation, job creation, poverty alleviation, and food security, whilst maintaining the ecological integrity of the biodiversity resource base, for thriving people and nature” (DFFE, 2016, p.4).

This last part of the description – that both nature and people need to thrive – is critical. Conservation has a chequered history and in too many cases local people have had to bear the cost of conservation rather than benefitting from it. [See for example Tauli-Corpuz, V., J. Alcorn, A. Molnar, C. Healy, and E. Barrow. 2020. Cornered by PAs: adopting rights-based approaches to enable cost-effective conservation and climate action. *World Development*⁵. Iconic species such as lions, leopards and elephants are central to Africa’s wildlife tourism industry and yet they represent a significant cost to local communities because they often kill livestock, destroy crops and harm people and critical community infrastructure.

Africa’s human population is growing rapidly putting ever increasing pressure on land and, in rural areas, is bringing people and wildlife into ever closer contact. If there is any hope of wild species continuing to thrive in Africa then there have to be

opportunities for it to co-exist with local people rather than conflict with them. This means that local people need to see some real benefits from the sustainable management and use of wildlife in order to have greater tolerance for wildlife on their land and, through this, support conservation.

As one commentator put it “This quid pro quo approach to nature may seem crass, but Africa is a continent of 1.3 billion people, projected to nearly double to 2.5 billion by 2050. Wildlife—especially wildlife that can kill you or take out an entire year’s crop overnight—will only have a future if it’s economically competitive with other forms of land use.”⁶ This is where the wildlife economy or biodiversity economy has an important role to play.

The South African NBES initially had a focus on two key sub-sectors: the bio-prospecting/bio-trade economy and the wildlife economy. The wildlife economy sub-sector comprised the breeding and sale of wild animals, wildlife products such as game meat, skins and hides or curio and jewellery production and included value chains around wildlife activities such as tourism, trophy hunting and the management of protected areas.⁷

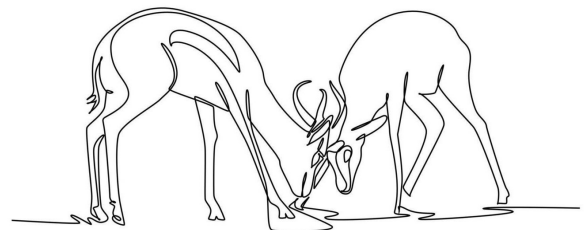
The concept of wildlife economy was picked up more widely across the continent in subsequent years and also evolved in scope to cover plants as well as animals and to encompass a wider range of products, activities and services. For example, the African Wildlife Economy Institute (AWEI), founded in 2018, defines the wildlife economy as “transformed, enhanced, and maintained [African] landscapes that deliver biodiversity conservation, climate resilience, inclusive economic opportunities, and community well-being through inclusive, diversified, and flourishing wildlife enterprises.”

In 2019, an African wildlife economy summit, convened by the United Nations Environment Programme and the African Union was hosted in Zimbabwe. At this summit, wildlife economy was described as one that “benefits people and nature, using habitats and wildlife in an ecological, economic and socially sustainable way.”⁸

Meanwhile, the African Leadership University (ALU) in Rwanda published a report in 2021 exploring the state of the wildlife economy across the continent and proposed a broader definition: “the use of wildlife, plants, and animals (marine and terrestrial) as an economic asset to create value that aligns with conservation objectives and delivers sustainable growth and economic development.”⁹

The ALU report highlighted five key wildlife economy activities:

The concepts of wildlife economy or biodiversity economy (the two terms mean similar things and are often used interchangeably) is now widely accepted on the continent and beyond, with the Southern African Development Community (SADC) having developed and formalised a Wildlife-based Economy Strategy Framework with the aim to contribute to the conservation and sustainable use of biodiversity and wildlife species and to meeting socio-economic and poverty alleviation objectives through the promotion of trade and investment in wildlife-based economy products and services.¹⁰



- 1) ECOTOURISM
- 2) HUNTING AND FISHING
- 3) WILDLIFE RANCHING
- 4) FOREST PRODUCTS
- 5) CARBON MARKETS

⁸ See for example Tauli-Corpuz, V., J. Alcorn, A. Molnar, C. Healy, and E. Barrow. 2020. Cornered by PAs: adopting rights-based approaches to enable cost-effective conservation and climate action. *World Development* 130:104923. <https://doi.org/10.1016/j.worlddev.2020.104923>

⁹ <https://www.biographic.com/africas-conservation-conundrum/> ⁷ Driver, A., Grobler, R., Tchetick, Y., Ginsburg, A., & Bouwer, G. (2021). Defining the biodiversity economy with a view to developing a Biodiversity Economy Satellite Account: Progress from South Africa. Paper presented at the 27th meeting of the London Group on Environmental Accounting, September 27–30 & October 4, 2021. https://seea.un.org/sites/seea.un.org/files/driver_defining-the-biodiversity-economy-satellite-account-progress-from-south-africa_paper.pdf

¹⁰ UNEP (2019) Communities step up to claim their rightful place in Africa's wildlife economy [Press release]. United Nations Environment Programme, Nairobi <https://www.unep.org/news-and-stories/press-release/communities-step-claim-their-rightful-place-africas-wildlife-economy>

⁹ Snyman, S., Sumba, D., Vorhies, F., Gitari, E., Ender, C., Ahenkan, A., Koumba Pambo, A.F. and Abiaga Natacha, O. (2021). State of the Wildlife Economy in Africa. Kigali: School of Wildlife Conservation, African Leadership University.

diversity

the importance of diversity for a resilient and sustainable wildlife economy

The important point to note about the concept of wildlife economy is the diversity of activities and products that are involved and the multiple value chains and related benefit streams that are generated. This is particularly important if we want to use the wildlife economy to build and sustain incentives for local communities to actively engage in conservation and to support and protect the wildlife base upon which the economy depends.

Even within the tourism sector of the wildlife economy (the focus of this paper) there is scope to diversify in order to increase benefits for communities and enhance resilience. There are many great examples of wildlife tourism initiatives that contribute significantly to community development as well as conservation including Responsible Tourism Award winners. The case studies below illustrate this clearly.

CASE STUDY I

!Xaus Lodge

!Xaus Lodge is a 24-bed lodge located in the South African sector of the Kgalagadi Transfrontier Park (KTP) and owned by the Indigenous ǀKhomani San and Mier communities. The land on which the lodge sits belongs to the communities under a historic land settlement agreement which returned 50,000 ha of land to these previously displaced communities.

The two communities then leased the land back to SANParks who are responsible for its management. The lodge is operated on behalf of the communities by a private company TFPD. TFPD pays the communities a percentage of gross annual turnover, which varies in relation to lodge income and local employment and procurement is prioritized.

15 community members are employed in the lodge, and 16 crafters work in the camp. Based on figures extracted from the !Xaus Lodge audited accounts, in the last year alone, the lodge generated ZAR 723, 128 (USD 45, 161) revenue for conservation (in the form of SANParks conservation fees charged to visitors entering the park) and ZAR 2,030,601 (USD 124,218) in community benefits.



www.xauslodge.co.za



CASE STUDY II

Foxes Safaris, Tanzania

Foxes Safari Camps is a family run company that operates lodges across Southern Tanzania. From the very beginning, the family was committed to responsible tourism and established the Friends of Ruaha Society in 1984 to promote wildlife conservation while also supporting local communities. Today, this work continues as the Foxes Community and Wildlife Conservation Trust which supports local communities in Mufindi District, the Great Ruaha River Catchment, and the Rufiji Basin Catchment. It does so through education and training, creating local employment opportunities and driving community-based conservation efforts. Nearly all the staff are local including the guides, who are all trained in-house to know all there is about the national park where they live and work. A company farm employs local people to produce fruit and vegetables, meat and dairy, out to supply their camps and lodges and to produce the building materials necessary to the camps.



www.foxessafaricamps.com

However, regardless of the conservation and community benefits that tourism can bring, the Covid-19 pandemic and the ensuing lockdowns highlighted the devastating impact that over-reliance on one industry could have. One report notes that the pandemic cost Africa up to USD 500 million in economic output, which in turn resulted in many jobs being lost, funding to protected areas declining, poaching increasing and a whole series of knock-on effects that were neg-

ative for both people and for wildlife.¹¹ The concept of wildlife economy seeks to identify the multitude and the diversity of different income streams that can be derived from wildlife and to capitalise as far as possible on each of those to enhance overall system resilience and a sustained contribution of benefits to people and to nature.

tourism

embracing the full definition of tourism to enhance diversity & resilience

Many people think of wildlife tourism as exclusively focused on photographic tourism. However, if tourism – as defined by the WTO – is “the activities of persons traveling to and staying in places outside their usual environment for not more than one consecutive year, for leisure, business, and other purposes not related to work or earning income in the place visited” then recreational/sport hunting is also a form of tourism (in fact in Tanzania hunting by international visitors is known as Tourist Hunting) – as is sport or game fishing. Both are components of the African wildlife economy as described by ALU and SADC.

Hunting tourism is often seen as a contentious practice because it involves the killing of animals - an activity that is at odds with some peoples' ethical frameworks (although not with others).¹² It is also worth noting that photographic tourism is far from being without impact on wildlife – “over tourism” can have significant negative effects on wildlife movements, breeding and feeding success and mortality.

From a purely pragmatic basis, however, it can also be a significant source of revenue which can provide incentives to maintain vast areas of land for conservation rather than converting it to other uses. Moreover, it is an activity that can – and often does - take place in areas that are often too remote or lack sufficient infrastructure for photographic tourists, or where the kind of wildlife viewing experiences that photo tourists seek are not available. An assessment conducted in 2007 found that around 1.4 million km² of land was used for trophy hunting in sub-Saharan Africa, exceeding the area encompassed by national parks by 22% in the countries where hunting is permitted. The report authors note that “Trophy hunting is thus of major importance to conservation in Africa by creating economic incentives for conserva-

tion over vast areas, including areas which may be unsuitable for alternative wildlife-based land uses such as photographic ecotourism”, and state that “financial incentives from trophy hunting effectively more than double the land area that is used for wildlife conservation, relative to what would be conserved relying on national parks alone.”¹³

This data is now more than 20 years old and it is hard to find up to date information on the scale of hunting land. In some cases, this may be declining as anti-hunting sentiment in Western countries takes hold and policies such as trophy import bans affect the viability of the industry. In Tanzania for example it has been estimated that nearly 60% of hunting concessions have been left unprotected because professional hunting outfitters haven't renewed their leases.¹⁴ This is at a time when the vast majority of protected areas across Africa are underfunded and when governments cannot afford to fill the gap left by hunting outfitters.

The data on the economic contributions of hunting tourism are patchy and inconsistent and so do not lend themselves to a country-by-country analysis or a direct comparison with photo tourism. Research has suggested, however, that trophy hunting generated USD 341 million in South Africa alone.¹⁵ The wildlife economy report compiled by the African Leadership University¹⁶ provides additional data on hunter numbers and revenue generated in multiple African countries (Table 1) – but again this data is old and there is an urgent need to provide a more accurate assessment of the current situation.

Country	ESTIMATE OF NO OF HUNTERS / YEAR	YEAR HUNTER DATA WAS RECORDED	AVE RECORDED ANNUAL REVENUE (MILLION USD)	TIMESPAN OVER WHICH AVERAGE IS CALCULATED
Botswana	350	2004	28.15	2000-2012
Burkina Faso	No data		0.8	2006
Cameroon	No data		3.8	2011-2012
Ethiopia	57	2008	1.42	2004-2011
Mozambique	542	2008	5	2008-2012
Namibia	5,363	2005	27.35	2000-2012
South Africa	7,600	2016	149.5	2006-2016
Tanzania	1,370	2015	31.7	2004-2015
Uganda	78	2019	0.6	2019
Zambia	250	2004	5.2	2004-2012
Zimbabwe	2,200	2015	20.3	2002-2015

Source: Snyman et al., 2021¹⁷

As with photo-tourism, the hunting tourism revenue is distributed between the state, the private sector and communities, varies from country to country depending on the specific policy framework and permitting system in place. Data collected from hunting tourism programmes on community land in East and Southern Africa show the proportion of concession fees retained by the community varied from 20% in Mozambique to 100% in Namibia.¹⁸

Overall, however, beyond the concession fee the overall proportion of the hunting tourism value chain captured by local communities is likely to be small – as it is for photo tourism. In terms of resilience some studies suggest that hunting tourism may be more resilient to shocks such as COVID-19 than photographic tourism, partly because it relies on a smaller, high-spending clientele willing to travel under higher risk conditions. However, empirical comparisons of recovery rates between the two sectors remain limited, and available evidence varies by region and tourism model.

The available studies show, though, that additional sources of income are essential to maintain a resilient economy whether this is at enterprise level, local level or national level.

A study of private wildlife ranches in South Africa, for example, found that those with more diverse activities (including hunting and photo tourism but also meat production) were far more resilient and able to adapt than those with a more limited activity base.¹⁹

¹¹ <https://www.bizcommunity.africa/Article/410/595/202904.html> ¹² It is also worth noting that photographic tourism is far from being without impact on wildlife – “over tourism” can have significant negative effects on wildlife movements, breeding and feeding success and mortality (<https://www.independent.co.uk/travel/safari-wildlife-nature/over-tourism-threat-wildlife-responsible-holiday-b2746509.html>) ¹³ <https://www.sciencedirect.com/science/article/abs/pii/S0006320706003831> ¹⁴ <https://www.biographic.com/africas-conservation-conundrum/> ¹⁵ <https://www.sciencedirect.com/science/article/pii/S2351989418302336> ¹⁶ <https://sowc.alueducation.com/research/> ¹⁷ https://drive.google.com/file/d/1p3MwZpUNJuQEurPt3IM9wOFA_8Jwamwp/view ¹⁸ https://www.conservationforce.org/_files/ugd/87ac64_8506aeaa08024050be51dd74efabc9b6.pdf ¹⁹ Lessons from COVID-19 for wildlife ranching in a changing world

economy

the importance of diversity for a resilient and sustainable wildlife economy

Opponents of hunting tourism often suggest that photo-tourism is a much better option in terms of the amount of money it can generate for local communities and governments, the jobs it can create, and its contribution to conservation. In some places and at some scales this is clearly true, for example, photographic tourism undoubtedly generates greater gross revenues than trophy hunting in Africa.²⁰

But one advantage of hunting tourism is that it generates considerably more income per client than photo tourism. As an example, in the Timbavati Private Nature Reserve in South Africa, it has been estimated that income from 21,000 photographic tourists generated 51% of the revenue in 2018, while just 21 hunters generated 30%.²¹

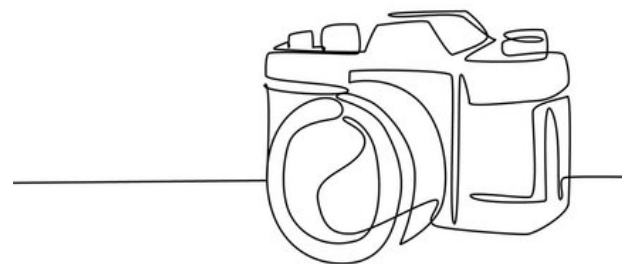
Hunting tourism is likely to be of particular importance in areas where photographic tourism is less competitive or unviable - such as in areas of dense vegetation, low animal densities, remote locations, or where there is a higher level of civil insecurity. It may also be the case that different revenue streams are more or less important at different times: for example, hunting revenue may provide initial income for an area, but photo-tourism may become increasingly important once it is more established.²²

Overall, both hunting tourism and photo-tourism – and indeed all land use options – are likely to have different costs and benefits at different times for different people, and the desirability of options

is likely to be very context specific. Given that most protected and conserved areas across Africa are under-resourced (Lindsey et al., 2018) most conservation landowners/managers generally require as many different income streams as possible, rather than choosing between options, in order to finance essential conservation activities and maintain viable businesses and provide employment.

These diverse income streams make for more resilient business models particularly in the face of external shocks such as Covid-19.²³

They also make for a more balanced product – the low volume nature of hunting tourism providing somewhat of a balance to the problem of “overtourism” which is seen in some popular photo-tourism areas.



²⁰ <https://www.sciencedirect.com/science/article/abs/pii/S0006320706003831> ²¹ Sustainability and the Timbavati Association in South Africa (PDF) ²² Complementary benefits of tourism and hunting to communal conservancies in Namibia



CASE STUDY III

Mount Etjo Safari Lodge

Photo tourism and hunting tourism combine with other wildlife economy activities at the Mount Etjo Safari Lodge in Namibia. Mount Etjo Safari Lodge in the Okonjati Game Reserve in Namibia is a family-run enterprise that represents the concept of wildlife economy, successfully mixing photo tourism, hunting tourism, game meat production and live animal sales. The 35,000 ha of land are home to approximately 7000 heads of wildlife including rhinos, elephants, big cats and plains game. Photographic tourism makes up for the majority of the turnover of the business (70% compared to 30% from hunting tourism) but it requires 12,300 photo tourists to generate this income compared to 73 hunting tourists. It also means the photo tourism component of the business has a much higher carbon footprint than the hunting tourism. And furthermore, the running expenses are higher for the photo tourism part of the business than for the hunting tourism. But at Mount Etjo it is not a case of either/or. It is the combination of multiple income streams – rather than reliance on one – that make this a sustainable business (and hence makes its investments in conservation viable). The offtake from hunting tourism is the equivalent of 0.04% of the total wildlife population and is seen as a critical tool to help manage the population - taking out older individuals in the population and enhancing genetic health - with no negative conservation implications.

Mount Etjo
Safari Lodge

www.mount-etjo.com

responsible

towards more resilient wildlife economies supported by responsible tourism

If we want to ensure the future of conservation in Africa, then we need to make sure it is a viable land use option in the face of competing demands. We must recognise that wildlife is an economic asset - and in the case of Africa a real competitive advantage – that can be a driver of economic development at all levels.

Going beyond a heavy reliance on photo-tourism, dependent on a limited number of iconic species, to recognising the full value of nature is critical for a resilient economy that delivers benefits for both conservation and people. The concept of wildlife economy challenges us to think outside the box and consider the multiple, diverse ways in which nature can provide a diversity of products and services, while still conserving natural resources and ensuring long-term sustainability.

Wildlife tourism doesn't just have to be non-consumptive (a misnomer when we think of the consumption of energy, water and carbon by thousands of tourists). Wildlife tourism also doesn't have to be just focussed on a limited number of iconic species – plants and landscapes also have much to offer as the case study below illustrates. And finally, tourism can be complemented by other wildlife economy activities.

One of the significant side benefits of hunting tourism is the meat that it generates – it is commonly a feature of hunting tourism agreements that the meat from hunted animals is distributed to the local community. Game meat production can also serve tourists in their lodges as well as local people and be an integral part of the overall tourism experience. In many locations wildlife populations need to be culled as part of their routine management – culling programmes can also be a source of meat to local communities and could – if appropriate regulatory systems were in place – be a source of local industry.

While this paper focuses on tourism in Africa, many of these same issues apply in other parts of the world. In rural Pakistan, for example, where photographic tourism is not feasible or viable, tourist hunting of markhor and ibex – two species of wild goat – brings in substantial income for the local community.

The concept of wildlife economy is gaining international political traction – the G20 is now embracing the linked concept of “bioeconomy”, within which the wildlife economy is an important component.

Responsible tourism is a key – but not the sole – element of the wildlife economy. Harnessing the diversity of products and services within the wildlife economy (for example forest products (such as honey, coffee), wildlife estates, carbon projects, etc.) both strengthens and diversifies the tourism product while also contributing to conservation and sustainable development.





CASE STUDY IV

Grootbos Nature Reserve

Beyond charismatic megafauna: The Grootbos Private Nature Reserve. Close the southernmost tip of Africa, the Grootbos Private Nature Reserve is a great example of a tourism product that is not dependent on charismatic megafauna but rather focuses on the unique ecosystem of the “fynbos” and the diversity of plant species it hosts. The Lodge upsells, trains and mentors its staff and supports and promotes local producers. The Grootbos Foundation, funded by the business and other donors, provides free skills and business training for employment and ‘economic dignity’ for local people. Its Green Futures College covers the training costs, uniforms, transport, food, stipends and childcare for between 20 and 24 unemployed people each year.

GROOTBOS
*Private Nature Reserve ******

www.grootbos.com

