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A Comparison of the Prices of Hunting Tourism in Southern and Eastern Africa



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Hunting tourism has been conducted in 7 eastern and southern African countries for more than 50 years and recently Uganda has re-opened hunting. This form of wildlife utilization generates significant income for community-based natural resource programs and contributes to the national economies of these countries - approximately 70% of the total cost of a Big Game Safari will enter the economy of the host country in the form of government licences and outfitter operating expenses.

Sustainable hunting tourism, or conservation hunting as it is sometimes called, therefore is an important tool in promoting conservation and rural development across a broad spectrum of landscapes. In terms of gross revenue generation the conservation hunting industry appears to be robust with growth being recorded in South Africa and Namibia but not in the other major southern and eastern African destinations. The key instruments that generate this income are the cost of various hunting packages offered by hunting operations. Understanding the market trends is therefore essential in determining the value that wildlife brings to local, national and regional economies.

Over 100 websites representing a broad spectrum of hunting operations from Tanzania, Zambia, Zimbabwe, Botswana, Mozambique, South Africa and Namibia were visited in 2008 and 2009 to gather data on the marketing strategies of this industry. This paper reviews the data gathered to establish the mean daily rate, trophy fee and hunt duration for a selection of hunting packages ranging from classic big game safaris to plains game ranch hunts. These data are then compared to determine marketing and pricing strategies for the various hunting packages across the region. From this a number of conclusions are drawn regarding the future growth of the industry.

This report is a joint initiative of the Food and Agriculture Organisation of the United Nations (FAO) and the International Council for Game and Wildlife Conservation (CIC). The author of the report, Vernon Booth, would like to thank Rene Czudek (FAO Wildlife and Protected Area Management Officer), Kai Wollscheid (Director General, CIC), Dr Rolf Baldus (President of the CIC Tropical Game Commission) and many safari outfitters and professional hunters that were consulted in their private capacity regarding marketing strategies and costs in the safari hunting industry.

Prices and all data have been collected with all possible care from information published on hunting outfitter websites on the internet. No guarantee is given that all the material was correctly copied into a database from the web pages, nor is it possible to ensure that the most recent up-to-date pricing information was available. Compiling the database was an enormous task undertaken merely to establish the broad comparisons between hunting packages in different countries. No particular hunting outfitter or agent was targeted and no specific effort made to ensure that the selection of hunting outfitters to include in the database was a representative sample of all hunting outfitters in a particular country. Only hunting outfitters who have published prices on the Internet are included.

Errors, omissions, mistakes or having used wrongly given information cannot therefore be ruled out due to the complexity of the subject. Prices change quickly, even within one season. The author and the editors of this paper cannot take any responsibility therefore for any errors or any damages suffered from using these data. It is strongly recommended that any persons interested in determining the price of hunting in any of the countries mentioned here to contact the hunting outfitter directly for the most up-to-date information.

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Seven southern and east African countries have conducted hunting tourism, or conservation hunting as it is sometimes called, for more than 50 years and have set aside approximately 650,000km² in which trophy animals are hunted under a variety of land use models ranging from communally owned land, state protected area land and privately owned land. The most recent addition to this group, Uganda, re-introduced hunting in 2001 under the revised Wildlife Statute of 1996 after it was banned in 1979 (Lamprey and Mugisha, 2009, Figure 1).

As a form of land use, conservation hunting generates significant income for local communities involved in community-based natural resource management (Frost and Bond, 2006, Taylor, 2009) as well as for national economies of these countries. Under appropriate governance and institutions conservation hunting has been a powerful tool used to promote conservation and rural development and thus improve the livelihoods of local communities (Wall and Child, 2009).

The growth indicators (number of hunter days sold, number of safaris conducted, number of animals shot) all suggest that conservation hunting, as an industry, is robust and has grown steadily since 1984. Lindsey, Roulet, and Romanach (2007) show that this growth, as measured in terms of gross annual revenues and number of foreign hunters to Africa, has been greatest in South Africa and Namibia, but has remained static in Botswana, Zimbabwe and Tanzania. The law of supply and demand plays a significant role in setting the pricing structures of hunting, and while Zimbabwe was able to influence the trophy fee value of certain species as a result of commanding market share, it was not able to shift the basic earning instruments - daily rate and trophy fee (Booth, 2002). An understanding of the trends and how conservation hunting is marketed is necessary to determine the value that wildlife conservation under this form of utilization brings to local, national and regional economies.

Damm (2005) summarises the daily rate and trophy fee data from over 200 South African hunting websites. These data, together with the limited data from Zimbabwe (Booth, 2002) provide a baseline against which it is possible to monitor trends in these two key earning instruments. This exercise has been repeated here where the average 2008 and 2009 daily rates and trophy fees (in US\$) and the number of days of various 1 hunter x 1 professional hunter packages has been collected and analysed from over 100 hunting brochures and

websites from Tanzania, Zambia, Zimbabwe, Mozambique, Botswana, Namibia and South Africa. The industry in Uganda is still in its infancy and therefore is not included here.



Figure 1: Southern and East African countries where hunting tourism (conservation hunting) is practiced

2. METHODOLOGY

While compiling the database no attempt was made to visit all hunting operation websites, nor any specific effort made to ensure that the selection of outfitters to include in the database was a sample representative of all of the hunting outfitters in the respective countries. Neither was any particular outfitter or group of outfitters identified or targeted. The selection criteria to include or not the prices published by any particular outfitter included, amongst others, if a hunt report was located on a hunting forum, if a referral was received to a particular outfitter and if it was easy to access the website. Furthermore it was not possible to ensure that the most recent price list was available or whether the information had been recently modified or updated.

Data from at least 10 different outfitters per country was compiled, and all data was pooled to arrive at a mean value for the daily rate, trophy fee and hunt duration. However in some cases it was found that agents have advertised a particular outfitter's services and prices at rates that are different from those offered by the outfitter himself, including different rates for the same outfitter offered by different agents. To overcome this, an attempt was made to contact outfitters to obtain a direct quote for a specific hunt. In most cases the outfitter provided the information, however in some cases no reply was received, or the enquiry was referred to directly to an agent(s), or a quote was provided that differed from that advertised or the outfitter offered the opportunity to negotiate "a tailor made hunt".

This made it difficult to decipher what was actually on offer and what the correct prices should be. There's only so much that can be done via the internet or email: the best method to find the latest information is by directly meeting the outfitters and professional hunters in person who live and work in these countries. The data presented here is therefore a snapshot of the position at the time the survey was undertaken between July 2008 and April 2009.

3. STANDARDISATION OF MARKETING STRATEGIES

Hunting safaris have traditionally been sold as "packages" with the more charismatic and dangerous animals (elephant, lion, leopard and buffalo) commanding higher prices than the "plains game" (sable, kudu, impala, zebra, warthog etc.) and demanding longer hunting periods i.e. 21 - day dangerous game vs 7- day plains game safaris. The exceptions to this strategy are in Tanzania where the Wildlife Division dictates the minimum duration of hunting packages to 21-day, 16-day and 10-days (Table 1), and Zambia where hunting packages are classified as "Classic safaris" i.e. minimum of 14-day safaris that include 1 lion and/or leopard, buffalo and assorted plains game, and "Mini" 7-day plains game only safaris. Outfitters with "Prime hunting areas" are required to conduct 5 Classic and 7 Mini safaris, while these preconditions are reduced for outfitters with "Secondary hunting areas" (ZAWA, 2004).

Table 1: The number of animals permitted on 21-day, 16-day and 10- day safari packages by the Tanzania Wildlife Division (Government of Tanzania, 2007).

Trophies	21	16	10	Trophies	21	16	10
Elephant	1			Baboon	3	2	2
Lion	1			Bushbuck	1	1	
Leopard	1			Crocodile	1	1	
Buffalo	3	2	2	Dik Dik	1	1	
Hippopotamus	1			Duiker (<i>Common</i>)	1	1	
Eland	1			Honey Badger	1	1	
Kudu-Lesser	1			Hyaena	1	1	
Kudu-Greater	1			Oribi	2	1	
Klipspringer	1			Reedbuck (<i>Bohor, Southern, Mountain</i>)	2	1	
Sable antelope	1			Suni	1	1	
Roan antelope	1			Waterbuck	2	1	
Oryx	1			Jackal	1	1	
Gerenuk	1			Steinbuck	2	1	
Sitatunga	1			Civet	1	1	
Porcupine	1			Serval	1	1	
Ostrich	1			Wild cat	1	1	
Genet	1			Zorilla	1	1	
Bushpig	1	1	1	Impala	2	1	1
Puku	1		1	Topi	2	1	1
Warthog	1	1	1	Wildebeest	2	1	1
Zebra	2	1	1				

Elsewhere in the region free market principles are applied by outfitters to determine the cost, length of hunt and the animals available in the “package” taking into consideration:

- The number and availability of dangerous big game species.
- The economic and political climate of the country in which they operate.
- The reputation of the country as a hunting destination.
- Quality of the hunting experience and trophies.
- The length of the hunting season, and
- The competition for similar hunting elsewhere in the country and the region.

Generally there is little variation in the overall composition of a particular hunting package between individual outfitters in the same country but there can be significant variations between countries. In order to compare these differences the hunting packages have been grouped into the following categories:

- Classic Big Game Safari (Elephant, Lion or Leopard, Buffalo plus assorted Plains Game).
- Lion with or without Buffalo and Plains Game Safaris.
- Leopard with or without Buffalo and Plains Game.
- Elephant with or without Buffalo and Plains Game.
- Buffalo and Plains Game.
- Buffalo Only.
- Specialised Plains Game (sable, waterbuck).
- Common Plains Game (kudu, impala, warthog etc.).

The overall average cost of these hunting packages in the different counties is presented in Table 2 and illustrated graphically in the figures below. Generally the hunting packages and rates include:

- The services of a licensed professional hunter/guide and the use of a hunting vehicle and fuel;
- Fully serviced luxury en-suite tented accommodation, all meals, drinks and laundry services during the contracted period;
- Trackers, skimmers and the necessary field and camp staff;
- Field preparation of trophies and transportation thereof to a shipping agent;
- Meeting the hunter on arrival;
- An emergency communication network and well stocked medical kit;

Excluded from the hunting packages are:

- Observer rates, fees for bait and trophy animals (this is discussed in the second section of this report)
- Packing, dipping and shipping of trophies, CITES permits, and gratuities;
- Any visa requirements, various gun and ammunition import licences, hunting permits, community and conservation programme levies etc.
- Accommodation, flights, travel charges and meet-and-greet services before and after the contracted period;
- Air and ground/water transfers to, from and between hunting camps (except where otherwise specified), additional vehicles required by hunting party, side excursions, scenic flights, airport taxes, and landing fees;
- Hire of rifles and shotguns, ammunition and fishing tackle;
- Any purchases on behalf of the client of a personal nature;
- Short term insurance against trip cancellation, theft, loss and damage of his personal property whilst on safari.

Table 2: The average cost (US\$) and number of hunter days for a variety of hunting packages on offer in various southern and east African countries. Shaded areas indicate the non-availability of this hunting package in a particular country or this package could not be located amongst the 100+ advertised brochures/websites that were examined. In some cases, particular safari packages were subject to quotation, especially for big game packages in South Africa. Data for Uganda are not included in this analysis as there are only a few specialized outfitters.

Hunting Package	Tanzania		Botswana		Zimbabwe		Zambia		Mozambique		South Africa		Namibia		Average Hunter days	
	Daily Rate	Days	Daily Rate	Days	Daily Rate	Days	Daily Rate	Days	Daily Rate	Days	Daily Rate	Days	Daily Rate	Days		
Elephant, Lion Leopard Buffalo & Plains Game	2,967	28	1,344	25	1,431	26			1,394	28					1,784	27
Elephant with Lion or Leopard Buffalo & Plains Game	2,300	21	1,534	22	1,479	21	3,482	28	1,534	23					2,066	23
Lion, Leopard Buffalo & Plains Game	2,870	21	1,265	21	1,194	18	3,267	21	1,295	22					1,978	21
Lion, Buffalo & Plains Game	1,905	21	1,265	21	1,400	18	2,695	21	1,291	17					1,711	20
Lion & Plains Game			4,124	19	2,650	21	2,000	21	1,088	15					2,466	19
Leopard, Buffalo & Plains Game	1,550	16	1,303	16	1,006	15	2,005	14	1,068	15	1,250	14			1,364	15
Leopard, Sable & Plains Game					810	14			1,017	15					914	14
Leopard & Plains Game	2,125	14	1,590	13	834	14	1,714	14	983	14	1,200	14	457	13	1,272	14
Elephant, Buffalo & Plains Game			2,128	13	1,391	16									1,759	15
Elephant & Plains Game			2,059	14	1,032	13	2,000	10	1,054	16					1,536	13
Buffalo, Sable & common plains game	3,265	16			956	12	2,073	10	850	12					1,786	13
Buffalo & Plains Game	2,078	10	1,567	10	909	10	1,440	7	878	10					1,374	9
Buffalo Only			950	7	1,652	8	790	8	1,381	7	817	8			1,118	8
Sable, Waterbuck & common Plains Game	3,850	10	965	9	646	10			1,057	12	536	10	450	10	1,251	10
Common Plains Game			723	7	478	8	1,500	7	634	7	461	8	350	7	691	7

4. Comparison of daily rates and structure of hunting packages

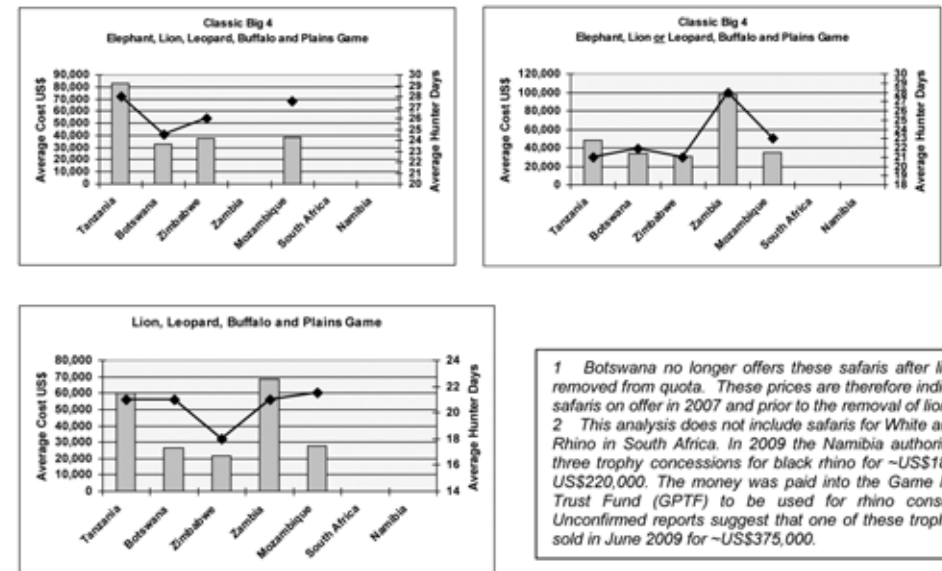
4.1 Classic Big Game Safaris:

The flagship hunting package across the region is the classic 21 – 28 day safari that includes all four big game species plus a range of the important plains game species such as sable, waterbuck, kudu, warthog and zebra. This safari is available in Tanzania, Botswana¹, Zimbabwe, Zambia and Mozambique, but not available in South Africa² and Namibia (Table 2).

These data show that Tanzania and Zambia are the most expensive hunting destinations for the classic “big four” safari (~US\$83,000 - US\$97,000 for a 28-day safari) when compared with other countries in the region that offer similar packages at a lower cost and for fewer days (~US\$30,000 - US\$40,000 on 24 – 28 day packages, Figure 2). Different marketing strategies are adopted e.g.:

- A Zambian classic 28-day Big Game Safari offers the hunting client either a lion or a leopard. Similar hunting packages elsewhere in the region are sold for considerably less (~US\$30,000 – US\$40,000) and for less days (18 – 21 days).
- The cost of a classic 21-day big game safari that does not include an elephant averages US\$60,000 in Tanzania; ~US\$68,000 in Zambia and between US\$21,000 – US\$27,000 elsewhere in the region.

Figure 2: Comparison of “CLASSIC BIG GAME” Safaris



1 Botswana no longer offers these safaris after lion were removed from quota. These prices are therefore indicative of safaris on offer in 2007 and prior to the removal of lion.
 2 This analysis does not include safaris for White and Black Rhino in South Africa. In 2009 the Namibia authorities sold three trophy concessions for black rhino for ~US\$187,000 – US\$220,000. The money was paid into the Game Products Trust Fund (GPTF) to be used for rhino conservation. Unconfirmed reports suggest that one of these trophies was sold in June 2009 for ~US\$375,000.

4.2 Lion Safaris

Traditionally lion safaris are offered on 18 – 21 day packages and most often include a buffalo (or other large game such as hippo) that are usually used as bait. In Tanzania a lion hunt is only available on a 21-day safari at an average cost of US\$40,000. Zambian outfitters charge a similar amount for the same safari while in Botswana, Zimbabwe and Mozambique this safari is considerably less (~US\$25,000), depending on the area and availability of quality lion trophies (Figure 3).

There is also a tendency to market lion safari packages without a trophy buffalo since it is more lucrative to sell 7 – 10 day buffalo safari packages separately. The most expensive of these packages are for safaris in areas where the probability of securing a quality lion trophy is high (e.g. the desert lion hunts in Botswana prior to lion being removed from quota). In contrast, some Mozambique outfitters offer a 15 – day lion only safari package for as low as US\$16,000.

As a rule Tanzania does not offer lion only hunting packages since most outfitters have access to large buffalo quotas, which provides Tanzania with a competitive edge over outfitters in surrounding countries.

It was not possible to obtain direct quotes for ranch-based lion safaris in South Africa.

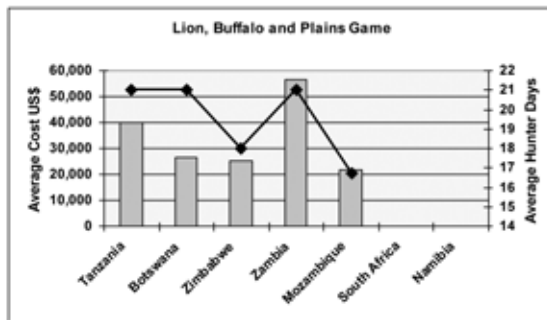
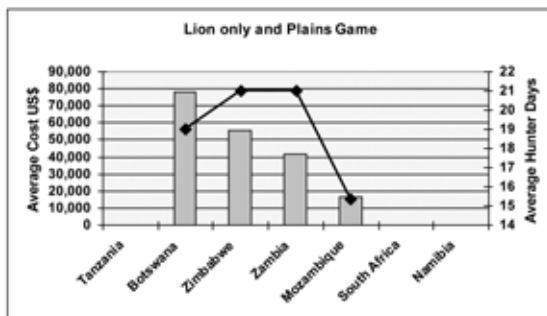


Figure 3: Comparison of LION Safaris



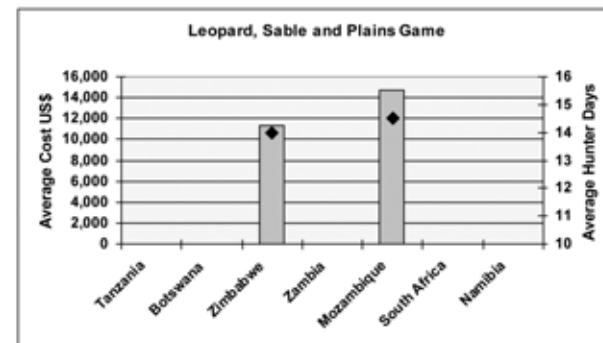
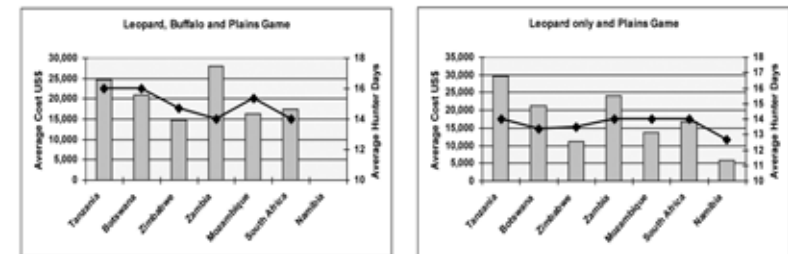
4.3 Leopard Safaris

CITES Appendix I status and country quotas for leopard restricts the availability of this trophy. Nonetheless, leopard is the most commonly available “Big Game” species in the region with all seven countries (excluding Uganda) offering this trophy in various hunting packages (Table 2, Figure 4). The cost of leopard safaris is therefore highly competitive, averaging US\$16,000 (Zimbabwe) to US\$28,000 (Zambia), and, with the exception of Namibia, generally includes a buffalo trophy and variety of plains game.

Furthermore since leopards are also common in areas outside of protected areas, they form an important part of hunting on private land where they add value to regular plains game hunting in countries such as Zimbabwe and Namibia. A few outfitters, who do not have access to buffalo, attempt to increase the value of a leopard safari (or alternatively a specialised plains game hunt) by including specialist plains game species such as a sable in the trophy bag.

More recently outfitters have begun to offer the hunting client the use of dogs to hunt leopards. This highly controversial form of hunting can increase the cost of the safari by as much as US\$4,000 for the hire of a dog handler and the pack. This introduces a new dimension into the marketing of this important species, which is likely to lead to a review of leopard quota allocations in the future.

Figure 4: Comparison of LEOPARD Safaris



4.4 Elephant Safaris

As in the case with leopard, CITES Appendix I and II restrictions apply to the hunting of elephant (see below). Those countries where elephant are listed as Appendix II (Zimbabwe, Botswana, Namibia and Tanzania) are in a position to market elephant safaris, either as standalone packages or in combination with buffalo (Figure 5). In Botswana, where some outfitters have been allocated large trophy elephant quotas (up to 60 animals in some cases), it is not uncommon to see short duration elephant safaris of 10 – 18 days on offer. Often such hunts have conditions that require the client to shoot the elephant irrespective of trophy size. There is also a tendency to sell elephant trophies on a sliding scale, depending of the weight of ivory (see below).

Of interest here is that the cost of elephant-only packages are on a par with leopard hunts (see Figure 3).

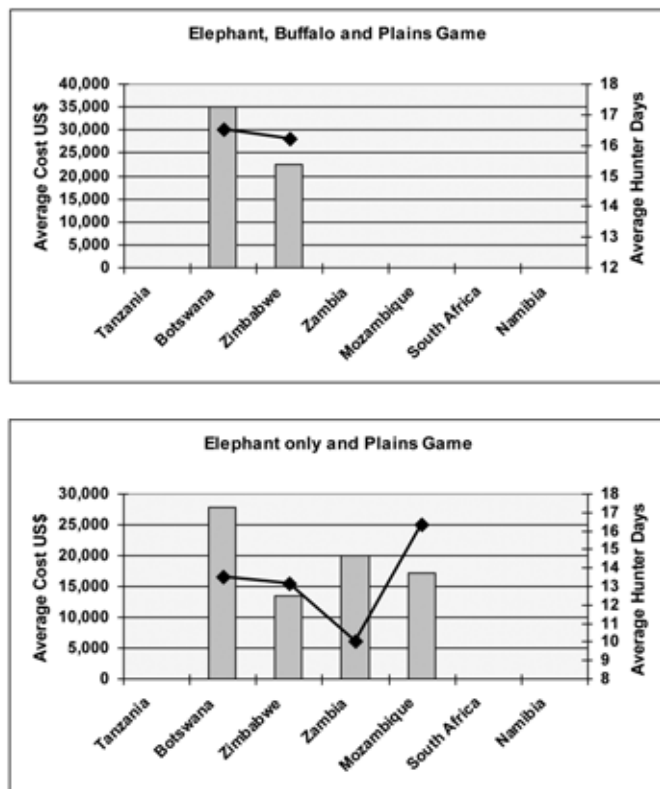


Figure 5: Comparison of ELEPHANT Safaris

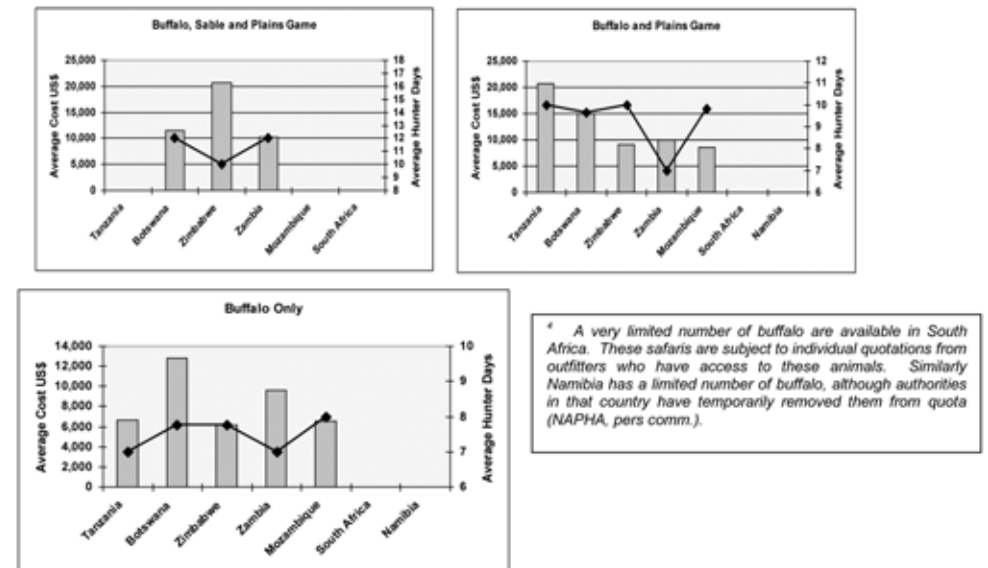
4.5 Buffalo Safaris

Trophy buffalo are the most important species driving the economics of the hunting industry in southern and eastern Africa since the inclusion of a buffalo trophy in a hunting package increases the value of a safari, and its marketability. For example, a typical 10-day buffalo safari with an assortment of plains game sells for US\$10,000 – US\$20,000. In contrast a 10-day plains game hunt without a buffalo sells for US\$2,000 – US\$5,000 (see below). It is not surprising therefore that buffalo are the most sought after trophy in the industry.

There is a vibrant market for 5 – 7 day buffalo only safaris (i.e. no other species included) across the region at a cost of between US\$6,000 and US\$12,000 (Figure 6). Very often a hunting client will combine a short buffalo hunt (say) in Zimbabwe with a relatively inexpensive plains game hunt in Namibia or South Africa⁴. As with leopard hunts, there are outfitters in Zambia, Zimbabwe and Mozambique who attempt to increase the attractiveness of a buffalo hunt by including specialist plains game such as sable in the package.

The high buffalo quotas in Tanzania coupled with the fact that a client can take 2 buffalo on a 10-day and 16-day safari (3 on a 21-day safari) gives outfitters in that country a major competitive edge. For example, a buffalo plus plains game safari in the region will sell for US\$10,000 – US\$16,000 while a similar hunt in Tanzania that includes two buffalo will sell for slightly more (~US\$20,000, Table 2, Figure 6).

Figure 6: Regional comparison for BUFFALO based Safaris



⁴ A very limited number of buffalo are available in South Africa. These safaris are subject to individual quotations from outfitters who have access to these animals. Similarly Namibia has a limited number of buffalo, although authorities in that country have temporarily removed them from quota (NAPHA, pers comm.).

4.6 Plains Game Hunting

Hunting packages for plains game (i.e. trophy bags that do not include any of the dangerous game) is the bread and butter of privately operated game ranches and farms in South Africa, Namibia and Zimbabwe, and is highly competitive as a result of the very large number of outfitters (up to 7,000 in South Africa). In general, a 5 – 7 day “common” plains game hunt on a private game ranch that includes up to 5 antelope species (kudu, impala, wildebeest, reedbuck, hartebeest etc.) will cost between US\$2,000 – US\$4,500 (Figure 7).

These hunting packages are not popular in countries where outfitters have access to dangerous game, especially buffalo, since the cost to the outfitter of mounting a plains game hunt is similar to a big game safari, but generates less income. Equally, a hunting client who can afford to travel to a big game area is unlikely to turn down the opportunity to hunt a buffalo. A few companies in Tanzania offer specialised plains game hunting at prices that are three times the average elsewhere in the region. A similar trend is seen in Zambia where a 7-day plains game hunt costs ~US\$10,000.

Outfitters in countries that do not have access to large numbers of dangerous game (South Africa and Namibia in particular) attempt to increase the value of these packages by accessing one or more of the dangerous game trophies from other outfitters, or even travelling to neighbouring countries (e.g. Zimbabwe, Zambia or Botswana). This will double and even treble the value of the plains game hunt (as is shown in the examples above).

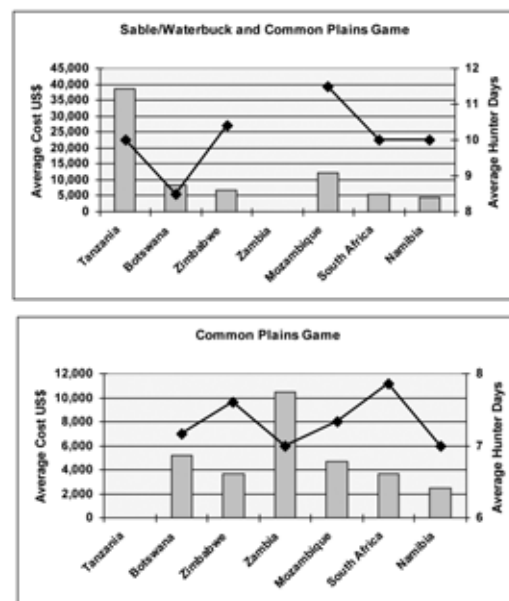


Figure 7: Comparison of PLAINS GAME Safaris

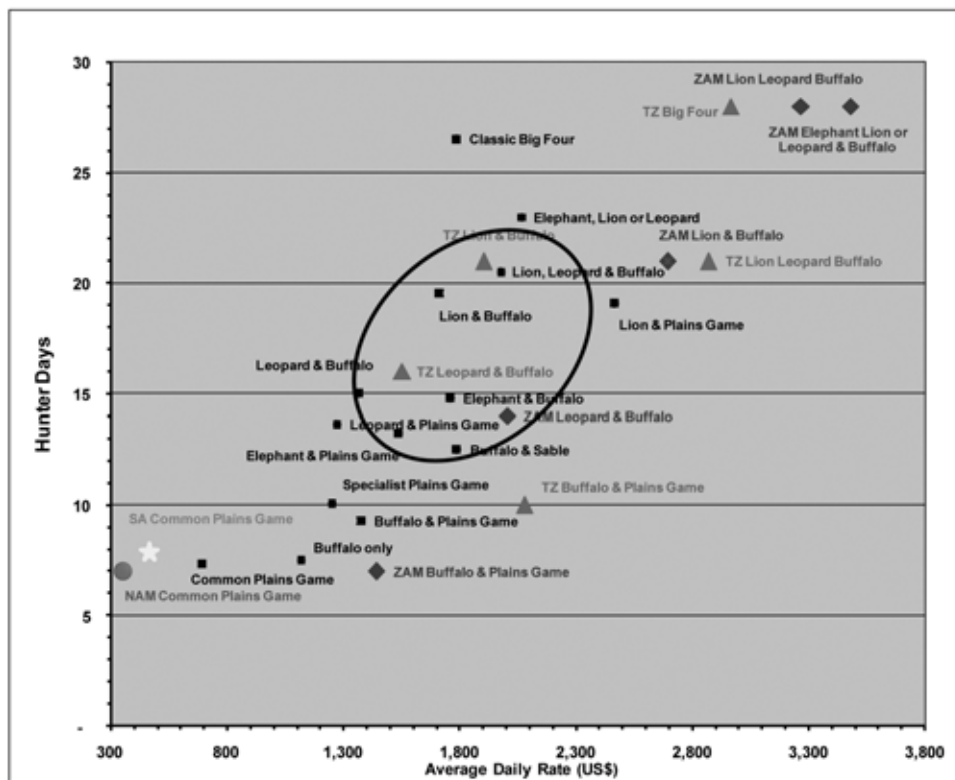
5. SUMMARY OF DAILY RATES

The marketing of hunting packages across the region is highly competitive with outfitters in the different countries applying a wide range of marketing strategies to generate the maximum income from the trophy animals available on quota. In general, the more dangerous big game animals available on quota, the easier it is to market the hunting packages and the higher the cost of the safari.

Table 2 summarises the average daily rates that apply to 1 x 1 hunting packages in the region. These range from as high as US\$3,400/day in Zambia for a classic 28-day safari to as little as US\$350/day for a plains game ranch hunt in Namibia. The data in Figure 8 show that 1 x 1 big game hunting packages in general are being marketed on 10 – 20 day hunting safaris at an average daily rate of US\$1,100 to US\$2,000 (overall average ~US\$1,600). Gerhard Damm (pers comm) provides comparable daily rates from 2002 for Zimbabwe (US\$750 – US\$1,200); Botswana (US\$1,600 – US\$1,800) and Tanzania (US\$1,700) which suggest that the overall price of big game safaris has not increased significantly in the last 5 years. It is only the specialised hunts such as the classic big four and lion hunting packages that are demanding longer duration hunts (>25 days) and/or higher daily rates (>US\$2,500/day). Comparable prices for similar hunts in Tanzania and Zambia show that, on average, the rates in these countries are higher than elsewhere in the region (Figure 8). The competitive nature of the conservation hunting industry is further highlighted when trophy costs are compared (see below).

There are also a number of “hidden” charges that are not captured in these data. For example, hunting clients are expected to tip the professional hunter and camp staff after a successful safari. Other miscellaneous charges could involve the use of professional hunters to pre-bait prior to the arrival of the client, cost of air charters etc. One client contacted independently during this study indicated that the cost of a US\$70,000 safari in Tanzania ballooned to US\$115,000 after all additional costs had been included.

Figure 8: Average Cost (US\$) and Duration (Days) of 1 x 1 Hunting Packages marketed in Southern and Eastern Africa (■). These data are compared to similar hunting packages in Tanzania (▲), Zambia (◆) South Africa (☆) and Namibia (●).



6. COMPARISON OF TROPHY FEES AND TRENDS

The previous section provides a summary of the cost paid per day for various hunting packages. This section provides an overview of the cost of the trophies that make up the hunting bags.

It is important however to distinguish between the Government Licence Fee and the Trophy Fee. The former are generally gazetted by government wildlife authorities for animals that they then sell on to commercial outfitters as part of the concession agreements. An outfitter who purchases the quota from the wildlife authority passes this cost at a profit to the hunting client i.e. the Trophy Fee.

With the exception of Tanzania where the client purchases the trophy animal directly from the Wildlife Division (although some outfitters in Tanzania add a percentage to this figure to help supplement funds for anti poaching efforts), all other countries rely on the private sector to market the trophy animals to the best advantage, relying on the principles of supply and demand to dictate the market value (Booth, 2002). Trophy fee prices and hunting packages are adjusted in situations where the land owner or appropriate authority has access to the wildlife, such as in Zimbabwe, South Africa, Botswana and Namibia.

The overall average trophy fee for over 130 plains game animals offered for hunting in Tanzania, Botswana, Zimbabwe, Zambia, Mozambique, South Africa, Namibia, are tabulated in Table 3 and 4 and discussed below. Selective data for specialist species (e.g. forest buffalo, mountain nyala) that are only available in Cameroon, Ethiopia and Central African Republic are also included here to demonstrate the value of these rare trophies to the industry.

Table 3: The range of average trophy fees (US\$) for plains game trophies available to the sport hunting industry in Africa.

See Table 4 for details for individual countries

Specialist Plains Game US\$3,000 – US\$6,000	Primary Plains Game US\$2,000 – US\$2,600	Secondary Plains Game US\$1,900 – US\$1,000	Common Plains Game		
			US\$600 – US\$950	US\$200 – US\$550	US\$50 – US\$180
Roan Southern	Sitatunga	Eland Cape	Grysbuck Cape	Gazelle Grant's	Salts Dik Dik
Mountain Nyala	Kudu East African	Tsessebe	Topi	Blesbuck	Cordeaux Dik Dik
Sable Common	Giraffe	Dik Dik Damara	Bushbuck Limpopo	Kob Western	Baboon
Oryx Fringe Eared	Lechwe Red	Roan Western	Wildebeest Whitebearded	Gazelle Thomson's	Porcupine
Bongo	Kudu Lesser	Bortebok	Bushbuck Cape	Duiker Red Flanked	Duiker Western Bush
Lechwe, Nile	Genenuk	Waterbuck Common	Ostrich	Impala East African	Impala Southern female
Sable Roosevelt	Crocodile	Kudu Southern	Bushbuck Masaai	Grysbuck Sharpe's	Guenthers Dik Dik
Eland Giant	Nyala	Gemsbok	Springbuck Black	Civet	Jackal, Golden
Roan East African	Black Lechwe	Northern Genenuk (Ethiopia)	Blesbuck White	Bushbuck Harnessed	Anubis Baboon
	Zebra Hartmann's	Southern Genenuk (Ethiopia)	Gazelle Robert's	Hamadras Baboon	
	Hippopotamus	Rhebuck Vaal	Zebra Cape Mountain	Springbok, Kalahari	
	Eland Livingstone's	Kudu Cape	Duiker Blue	Bushpig	
	Eland East African	Hartebeest Letwe's	Puku	Steenbuck	
	Meneliks Bushbuck	Abyssinien Greater Kudu	Chandlers Mountain Reedbuck	Caracal	
	Kob, White-eared	Wildebeest Black	Reedbuck Common	Kudu Southern female	
	Hartebeest, Newman's	Soemmering Gazelle	Duiker Red	Warthog	
		Hartebeest Coke's (Kongoni)	Hyena Spotted	Tiang	
		Wildebeest Nyassa	Serval	Impala Southern	
		Zebra Burchell's	Reedbuck Ilohor	Springbuck Cape	
		Hartebeest Lichstenstein's	Oribi	Abyssinien Bushbuck	
		Waterbuck Sing Sing	Bushbuck Chobe	Dik Dik Kirk's	
		Klipspringer	Reedbuck Mountain	Duiker Common	
		Hartebeest Red		Olive Baboon	
		Wildebeest Blue		Genet	
		Suni Livingstone's		Bat eared fox	
		Springbuck White		Colobus, Black & White	
		Forest Hog Giant		Honeybadger	
		Waterbuck, Defassa		Duiker East African Bush	
		Duiker, Yellowbacked		Wildcat African	
		Baboon, Gelada		Northern Grant's Gazelle	
		Oryx, Besia		Jackal, Black backed	

Table 4: Average trophy fees (US\$) for dangerous and plains game animals available to the African hunting industry.

Botswana - trophy & licence totalled; South Africa includes Conservation Trust Levy; Tanzania, Zimbabwe and CAR include Community and/or Conservation Levy where applicable; Mozambique includes Government Abate Fee. n/a = Information not available or trophy not available.

Common Name	Tanzania	Botswana	Zimbabwe	Zambia	Mozambique	Namibia	South Africa	Cameroon	Ethiopia	CAR	Mean
Elephant 100lb+					\$41,000			n/a	n/a	n/a	\$41,000
Elephant 90 - 99lb					\$36,000			n/a	n/a	n/a	\$36,000
Elephant 80lb - 90lb		\$30,000			\$27,500			n/a	n/a	n/a	\$28,750
Elephant 70 - 79lb	\$26,750	\$25,000	\$15,000		\$33,000			n/a	n/a	n/a	\$24,938
Elephant 60 - 69lb	\$16,000	\$19,000	\$14,000		\$24,500			n/a	n/a	n/a	\$18,375
Elephant - No restriction		\$18,600	\$14,417		\$17,750			n/a	\$10,000	n/a	\$15,192
Elephant 50 - 59lb		\$14,250	\$12,000		\$15,000			n/a	n/a	n/a	\$13,750
Elephant No ivory tax	n/a	n/a	\$13,500	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$13,500
Elephant >49lb	\$11,500	\$10,000	\$10,500					n/a	n/a	n/a	\$10,667
Forest Elephant	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$8,000	n/a	n/a	\$8,000
Elephant Tuskleless	n/a	n/a	\$4,250	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$4,250
Elephant Cow	n/a	n/a	\$3,600	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$3,600
Rhino Black	n/a	n/a	n/a	n/a	n/a	\$375,000	n/a	n/a	n/a	n/a	\$375,000
Rhino White	n/a	n/a	n/a	n/a	n/a	n/a	\$30,000			n/a	\$30,000

Common Name	Tanzania	Botswana	Zimbabwe	Zambia	Mozambique	Namibia	South Africa	Cameroon	Ethiopia	CAR	Mean
Lion	\$7,083	\$29,000	\$5,983	\$6,000	\$7,940	n/a	\$31,500	n/a	\$2,000	n/a	\$12,787
Lioness	n/a	n/a	\$3,163	n/a	n/a	n/a	\$8,500	n/a	n/a	n/a	\$5,831
Leopard	\$5,417	\$7,150	\$3,640	\$4,000	\$4,444	\$3,313	\$2,500	n/a	\$2,300	n/a	\$4,095
Cheetah	n/a	n/a	\$2,750	n/a	n/a	\$3,244	n/a	n/a	n/a	n/a	\$2,997

Common Name	Tanzania	Botswana	Zimbabwe	Zambia	Mozambique	Namibia	South Africa	Cameroon	Ethiopia	CAR	Mean
Buffalo Cape	\$1,650	\$3,744	\$2,822	\$2,133	\$2,734	n/a	\$11,175	n/a	n/a	n/a	\$2,617
Forest Buffalo	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$2,750	n/a	\$1,200	\$1,975
Buffalo North Western	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$1,550	\$1,550
Nile Buffalo	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$1,500	n/a	\$1,500



Common Name	Tanzania	Botswana	Zimbabwe	Zambia	Mozambique	Namibia	South Africa	Cameroon	Ethiopia	CAR	Mean
Buffalo Cape Cow	n/a	n/a	\$1,148	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$1,148

Common Name	Tanzania	Botswana	Zimbabwe	Zambia	Mozambique	Namibia	South Africa	Cameroon	Ethiopia	CAR	Mean
Roan Southern	n/a	n/a	n/a	\$4,683	n/a	\$7,750	n/a	n/a	n/a	n/a	\$6,217
Mountain Nyala	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$5,000	n/a	\$5,000
Sable Common	\$3,067	\$3,000	\$3,394	\$4,425	\$3,630	\$7,250	\$9,750	n/a	n/a	n/a	\$4,931
Oryx Fringe Eared	\$3,600	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$3,600
Gerenuk	\$3,593	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$3,593
Bongo	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$4,250	n/a	\$2,500	\$3,375
Sable Roosevelt	n/a	n/a	n/a	n/a	\$3,345	n/a	n/a	n/a	n/a	n/a	\$3,345
Eland Giant	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$3,250	\$3,250
Roan East African	\$3,200	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$3,200

Common Name	Tanzania	Botswana	Zimbabwe	Zambia	Mozambique	Namibia	South Africa	Cameroon	Ethiopia	CAR	Mean
Sitatunga	\$3,355	n/a	n/a	\$3,717	n/a	n/a	n/a	\$2,000	n/a	\$1,500	\$2,643
Kudu East African	\$2,633	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$2,633
Giraffe	n/a	\$3,500	\$1,658	n/a	n/a	\$2,528	\$2,806	n/a	n/a	n/a	\$2,623
Lechwe Red	n/a	\$2,275	n/a	\$2,250	n/a	n/a	\$3,242	n/a	n/a	n/a	\$2,589
Kudu Lesser	\$3,650	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$1,500	n/a	\$2,575
Gerenuk	\$3,593	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$1,500	n/a	\$2,547
Crocodile	\$2,025	\$4,592	\$3,120	\$1,950	\$2,296	n/a	n/a	n/a	\$1,000	n/a	\$2,497
Nyala	n/a	n/a	\$2,450	n/a	\$2,650	n/a	\$2,253	n/a	n/a	n/a	\$2,451
Black Lechwe	n/a	n/a	n/a	\$2,250	n/a	n/a	n/a	n/a	n/a	n/a	\$2,250
Zebra Hartmann's	n/a	n/a	n/a	n/a	n/a	\$940	\$3,500	n/a	n/a	n/a	\$2,220
Hippopotamus	\$1,917	n/a	\$2,833	\$1,983	\$3,055	n/a	\$2,850	n/a	\$600	n/a	\$2,206
Eland Livingstone's	n/a	\$2,479	\$1,372	\$2,767	\$2,229	\$1,779	\$2,500	n/a	n/a	n/a	\$2,188
Eland East African	\$2,150	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$2,150
Meneliks Bushbuck	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$2,000	n/a	\$2,000
Kob, White-eared	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$2,000	n/a	\$2,000
Hartebeest, Newman's	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$2,000	n/a	\$2,000

Common Name	Tanzania	Botswana	Zimbabwe	Zambia	Mozambique	Namibia	South Africa	Cameroon	Ethiopia	CAR	Mean
Eland Cape	n/a	n/a	n/a	n/a	n/a	n/a	\$1,992	n/a	n/a	n/a	\$1,992
Tsessebe	n/a	\$1,785	\$1,014	\$2,150	n/a	n/a	\$2,558	n/a	n/a	n/a	\$1,877
Dik Dik Damara	n/a	n/a	n/a	n/a	n/a	\$1,867	n/a	n/a	n/a	n/a	\$1,867
Roan Western	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$1,850	\$1,850
Bontebok	n/a	n/a	n/a	n/a	n/a	n/a	\$1,740	n/a	n/a	n/a	\$1,740
Waterbuck Common	\$1,028	\$1,838	\$1,739	\$1,067	\$1,699	\$1,975	\$1,879	n/a	n/a	n/a	\$1,604
Kudu Southern	n/a	\$1,634	\$1,083	\$1,833	\$2,215	\$1,012	\$1,664	n/a	n/a	n/a	\$1,574
Gemsbok	n/a	\$1,709	\$2,500	n/a	n/a	\$697	\$1,230	n/a	n/a	n/a	\$1,534
Northern Gerenuk (Ethiopia)	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$1,500	n/a	\$1,500
Southern Gerenuk (Ethiopia)	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$1,500	n/a	\$1,500
Rhebuck Vaal	n/a	n/a	n/a	n/a	n/a	n/a	\$1,444	n/a	n/a	n/a	\$1,444
Kudu Cape	n/a	n/a	n/a	n/a	n/a	n/a	\$1,400	n/a	n/a	n/a	\$1,400
Hartebeest Lelwel's	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$2,000	\$725	\$1,363
Abyssinian Greater Kudu	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$1,340	n/a	\$1,340
Wildebeest Black	n/a	\$1,650	n/a	n/a	n/a	\$1,264	\$1,102	n/a	n/a	n/a	\$1,339
Soemmering Gazelle	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$1,300	n/a	\$1,300
Hartebeest Coke's (Kongoni)	\$1,253	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$1,253
Wildebeest Nyassa	\$898	n/a	n/a	\$1,633	\$1,162	n/a	n/a	n/a	n/a	n/a	\$1,231
Zebra Burchell's	\$1,271	\$1,923	\$961	\$950	\$1,150	\$897	\$1,100	n/a	n/a	n/a	\$1,179
Hartebeest Lichtenstein's	\$780	n/a	n/a	\$1,000	\$1,679	n/a	n/a	n/a	n/a	n/a	\$1,153
Waterbuck Sing Sing	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$1,100	\$1,100
Klipspringer	\$1,358	n/a	\$580	\$1,000	n/a	\$2,000	\$922	n/a	\$700	n/a	\$1,093
Hartebeest Red	n/a	\$1,126	\$1,500	n/a	n/a	\$695	\$1,052	n/a	n/a	n/a	\$1,093
Wildebeest Blue	\$748	\$1,601	\$819	\$1,313	n/a	\$1,060	\$976	n/a	n/a	n/a	\$1,086
Suni Livingstone's	\$613	n/a	n/a	n/a	\$940	n/a	\$1,700	n/a	n/a	n/a	\$1,084
Springbuck White	n/a	n/a	n/a	n/a	n/a	n/a	\$1,071	n/a	n/a	n/a	\$1,071
Forest Hog Giant	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$1,750	\$500	\$938	\$1,063
Waterbuck Defassa	\$1,243	n/a	n/a	\$1,467	n/a	n/a	n/a	n/a	\$450	n/a	\$1,053
Duiker Yellowbacked	n/a	n/a	n/a	\$1,000	n/a	n/a	n/a	\$1,250	n/a	\$750	\$1,000
Gelada Baboon	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$1,000	n/a	\$1,000
Oryx, Besia	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$1,000	n/a	\$1,000

Common Name	Tanzania	Botswana	Zimbabwe	Zambia	Mozambique	Namibia	South Africa	Cameroon	Ethiopia	CAR	Mean
Grysbuck Cape	n/a	n/a	n/a	n/a	n/a	n/a	\$959	n/a	n/a	n/a	\$959
Topi	\$928	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$928
Bushbuck Limpopo	n/a	\$975	n/a	n/a	n/a	n/a	\$880	n/a	n/a	n/a	\$928
Wildebeest Whitebearded	\$923	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$923
Bushbuck Cape	n/a	n/a	n/a	n/a	n/a	n/a	\$878	n/a	n/a	n/a	\$878
Ostrich	\$1,453	\$685	n/a	n/a	n/a	\$603	\$646	n/a	\$900	n/a	\$857
Bushbuck Masaai	\$863	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$863
Springbuck Black	n/a	n/a	n/a	n/a	n/a	n/a	\$850	n/a	n/a	n/a	\$850
Blesbuck White	n/a	n/a	n/a	n/a	n/a	n/a	\$821	n/a	n/a	n/a	\$821
Gazelle Robert's	\$800	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$800
Zebra Cape Mountain	n/a	n/a	n/a	n/a	n/a	\$780	n/a	n/a	n/a	n/a	\$780
Duiker Blue	n/a	n/a	n/a	\$550	\$1,365	n/a	\$1,030	\$650	n/a	\$175	\$754
Puku	n/a	n/a	n/a	\$700	n/a	n/a	n/a	n/a	n/a	n/a	\$700
Chandlers Mountain Reedbuck	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$700	n/a	\$700
Reedbuck Common	\$527	n/a	\$600	\$600	\$759	n/a	\$845	n/a	n/a	n/a	\$666
Duiker Red	\$675	n/a	n/a	n/a	\$710	n/a	\$1,000	n/a	n/a	\$250	\$659
Hyena Spotted	\$567	\$1,039	\$396	\$600	\$700	\$1,200	\$650	n/a	\$90	n/a	\$655
Serval	\$475	n/a	\$400	n/a	n/a	n/a	\$1,525	n/a	\$165	n/a	\$641
Reedbuck Bohor	\$1,103	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$350	\$450	\$634
Oribi	\$342	n/a	n/a	\$500	\$1,055	n/a	\$1,266	n/a	\$160	\$275	\$600
Bushbuck Chobe	\$450	n/a	\$700	\$633	\$839	n/a	\$550	n/a	\$350	n/a	\$587
Reedbuck Mountain	\$650	n/a	n/a	n/a	n/a	n/a	\$586	n/a	\$500	n/a	\$579

Common Name	Tanzania	Botswana	Zimbabwe	Zambia	Mozambique	Namibia	South Africa	Cameroon	Ethiopia	CAR	Mean
Gazelle Grant's	\$567	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$220	n/a	\$393
Blesbuck	n/a	\$638	n/a	n/a	n/a	\$607	\$452	n/a	n/a	n/a	\$565
Kob Western	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$550	\$550
Gazelle Thomson's	\$550	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$550
Duiker Red Flanked	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$550	\$550
Impala East African	\$581	n/a	n/a	n/a	\$500	n/a	n/a	n/a	n/a	n/a	\$541
Grysbuck Sharpe's	\$417	n/a	\$268	\$375	\$750	n/a	\$823	n/a	n/a	n/a	\$527

Common Name	Tanzania	Botswana	Zimbabwe	Zambia	Mozambique	Namibia	South Africa	Cameroon	Ethiopia	CAR	Mean
Civet	\$332	n/a	\$263	\$800	n/a	n/a	\$623	n/a	n/a	n/a	\$504
Bushbuck Harnessed	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$500	\$500
Hamadras Baboon	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$500	n/a	\$500
Springbok, Kalahari	n/a	\$505	n/a	n/a	n/a	\$452	\$474	n/a	n/a	n/a	\$477
Bushpig	\$454	\$900	\$313	\$500	\$426	n/a	\$499	n/a	\$200	n/a	\$470
Steenbuck	\$335	\$342	\$259	n/a	\$1,150	\$399	\$331	n/a	n/a	n/a	\$469
Caracal	n/a	n/a	\$440	n/a	n/a	\$330	\$878	n/a	\$200	n/a	\$462
Kudu Southern female	n/a	n/a	\$434	n/a	n/a	\$500	\$420	n/a	n/a	n/a	\$451
Warthog	\$561	\$496	\$320	\$525	\$400	\$486	\$408	n/a	\$200	\$375	\$419
Tiang	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$400	n/a	\$400
Impala Southern	\$300	\$523	\$248	\$283	\$329	\$624	\$392	n/a	n/a	n/a	\$385
Springbuck Cape	n/a	n/a	n/a	n/a	n/a	n/a	\$350	n/a	n/a	n/a	\$350
Abyssinian Bushbuck	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$350	n/a	\$350
Dik Dik Kirk's	\$342	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$342
Duiker Common	\$400	\$328	\$211	\$450	\$439	\$382	\$310	n/a	\$180	n/a	\$337
Olive Baboon	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$500	\$150	\$325
Genet	\$315	\$200	\$173	\$850	n/a	n/a	\$298	n/a	\$100	n/a	\$323
Bat eared fox	\$250	n/a	n/a	n/a	n/a	n/a	\$500	n/a	\$150	n/a	\$300
Colobus, Black & White	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$300	n/a	\$300
Honeybadger	\$400	n/a	\$280	n/a	n/a	n/a	n/a	n/a	\$150	n/a	\$277
Duiker East African Bush	\$338	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$180	n/a	\$259
Wildcat African	\$318	\$200	\$143	n/a	n/a	n/a	\$407	n/a	\$100	n/a	\$234
Northern Grant's Gazelle	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$220	n/a	\$220
Jackal, Black backed	\$298	\$269	\$121	\$438	n/a	\$75	\$194	n/a	\$50	n/a	\$206

Common Name	Tanzania	Botswana	Zimbabwe	Zambia	Mozambique	Namibia	South Africa	Cameroon	Ethiopia	CAR	Mean
Salts Dik Dik	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$170	n/a	\$170
Cordeaux Dik Dik	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$170	n/a	\$170
Baboon	\$181	\$223	\$49	\$100	\$188	\$217	\$185	n/a	n/a	n/a	\$163
Porcupine	\$212	\$193	\$156	n/a	n/a	n/a	\$200	n/a	\$25	n/a	\$157
Duiker Western Bush	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$150	\$150
Impala Southern female	n/a	\$220	\$105	n/a	n/a	n/a	\$80	n/a	n/a	n/a	\$135
Guenthers Dik Dik	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$100	n/a	\$100
Jackal, Golden	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$80	n/a	\$80
Anubis Baboon	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	\$50	n/a	\$50

6.1 Elephant

In recent years the marketing of this trophy has shifted from a fixed fee to one that is linked to the weight of ivory. Elephant trophies are also affected by CITES restrictions and quotas. The countries that have CITES approved elephant quotas (Tanzania, Zimbabwe, Namibia, Botswana) all adopt different strategies to market elephant, based on the weight of the ivory, and availability of elephant (Figure 9). Mozambique adopts a similar strategy however export of these trophies is restricted to some European countries and Arab states.

This trophy fulfils an important role in the marketing of hunting in community based natural resource programmes such as CAMPFIRE and for communities in Botswana that market elephant through various joint venture agreements with hunting outfitters.

Botswana and Zimbabwe have the highest elephant quotas in the region, however Botswana is able to command higher trophy prices based on the trophy quality of ivory. Mozambique has only recently opened up elephant hunting, mostly in the north of the country, where trophies in excess of 70lbs are to be found. This has driven the market price for these trophies with the magical 100lb trophy averaging US\$41,000 (Figure 9).

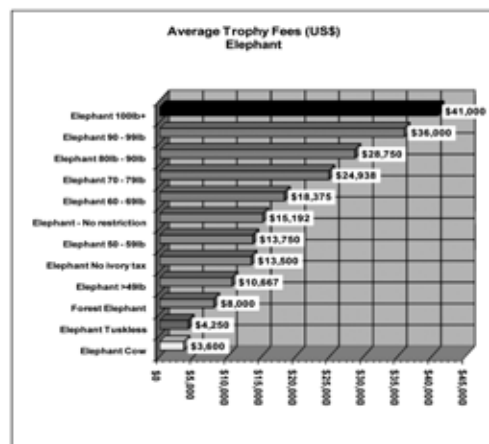
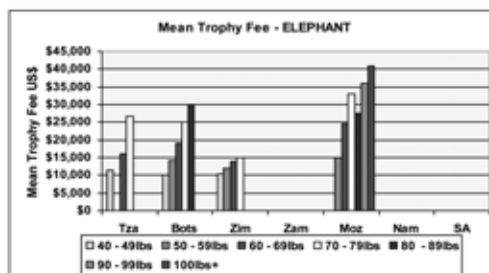


Figure 9: Mean cost of elephant trophies increases with an increase in the weight of the ivory.



6.2 Lion, Leopard and Cheetah

These trophies are available across the region but not in all countries. Free-roaming lion safaris are available in Tanzania, Zambia, Zimbabwe and Mozambique, while ranch hunts for lion are available in South Africa. All southern and eastern African countries offer leopard as trophies, although the quotas for this species are regulated under CITES Appendix I. Cheetah is a specialist trophy that is available in Namibia and on a special permit in Zimbabwe.

Lion are by far the most expensive of this group of trophies, although leopard is the most popular and widely available (Figure 10).

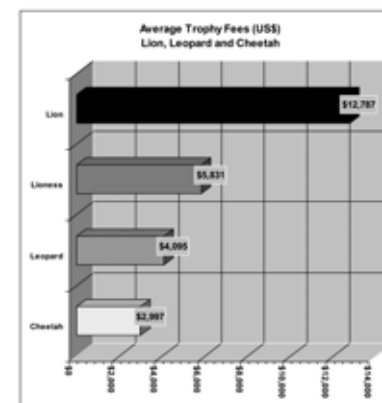


Figure 10: The average trophy cost of lion, lioness, leopard and cheetah

6.3 Lion

Lion trophies were selling for ~US\$29,000 in Botswana prior to the ban, and up to US\$31,000 in South Africa. In the rest of the region lion trophies are marketed at US\$4,500 – US\$7,500 (Figure 11).

The ban imposed in Botswana in 2007 and the restrictions placed on “canned” lion hunting in South Africa is likely to influence the trophy fee of lions in the region in future. It is predicted that these interventions have placed a premium on lion safaris which will drive up the price of this trophy and the hunting package in the next few years if it is not upgraded to Appendix I at the next CITES meeting in 2010.

Mozambique has responded to this demand by increasing the trophy fee of lion in the Niassa National Reserve from US\$2,000 in 2008 to US\$5,400 in 2010 by

6.4 Leopard

including a hunting levy over and above the official fee. It has also introduced strict regulations to ensure that only males older than 6 years are hunted (SRN, 2006). In Zimbabwe the trend in the cost of lion trophies remained static between 1998 and 2002. This trend is beginning to shift, with an increase of almost 100% between 2002 and 2008 (Figure 12), while the average price for a lion trophy auctioned at the annual Zimbabwe Zambezi Valley Hunt between 2005 and 2007 was ~US\$41,000 with a single lion trophy selling for ~US\$48,000 in 2007. The prices for two lions on offer in 2009 were greatly reduced to US\$5,500 and US\$11,500 respectively (Booth 2009).

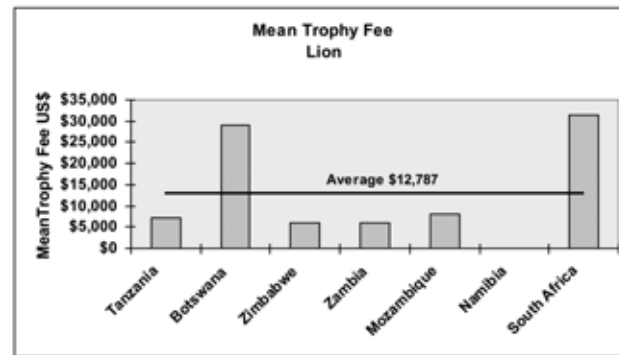
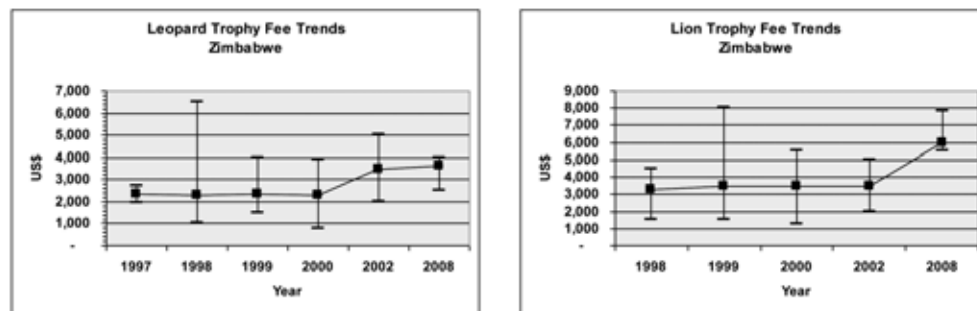


Figure 11: The average fee for lion trophies across the region

Figure 12: The trend on the average cost of lion and leopard trophies in Zimbabwe (data adapted from Booth, 2002).



This is a common trophy throughout the region and therefore the trophy fee for leopard is highly competitive. In Zimbabwe the trend in leopard trophies remained static at approximately US\$2,200 between 1997 and 2000, and only shifted to US\$3,500 – US\$4,000 after 2002 (Figure 12). Botswana and Tanzania have substantially increased the cost of this species (~US\$5,500 – US\$7,000), while Namibia and South Africa are lagging behind (Figure 13, Table 4).

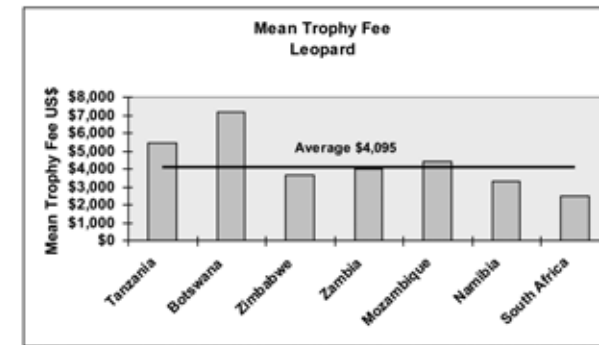


Figure 13: The average fee for leopard trophies across the region

CITES permit and quota restrictions have influenced the cost of leopard trophies across the region. However, the key factor in recent times is the introduction of hunting leopards using a pack of trained dogs. Prior to this, the success of securing leopard trophies was generally assured only in government controlled hunting areas. Leopard hunts on private ranches, or in areas where they have been persecuted as “problem animals” is notoriously difficult with low success rates. The introduction of hunting leopard with dogs has changed this with almost 100% success rates being recorded. This has introduced a new dimension to the manner in which leopard hunting will be managed and administered in future. For example, the Namibian Ministry of Environment and Tourism (MET) halted the issuing of Trophy Hunting Permit applications for leopard in June 2009 after their CITES export quota for 250 trophy animals was exhausted. Furthermore the Namibian Professional Hunting Association (NAPHA) appealed to the MET to suspend the issuing of leopard and cheetah trophy-hunting permits for 2010, including a temporary suspension on hunting leopards with hounds. This action was taken after increasing reports of alleged unscrupulous, unethical and illegal hunting practices were received by the organisation (<http://allafrica.com/stories/200908110400.html>).

It is possible that the current CITES leopard quotas will come under review, and quotas on private properties will be more strictly controlled in future. It is also conceivable that the cost of leopard trophies will increase, especially now that the hunting client has a better than even chance of securing this elusive trophy.

6.5 Buffalo

The Cape buffalo commands a higher price than the specialist Forest and “Nile” buffalo found in the CAR, Cameroon and Ethiopia (Figure 14, Table 4). The Cape buffalo is probably the most sought after dangerous game trophy in Africa, and as in the case with leopard, the trophy price of buffalo across the region is highly competitive ranging from US\$1,650 (Tanzania) to US\$3,744 (Botswana) and averaging US\$2,617 across the region. The exception to this is South Africa where the availability of buffalo is limited and therefore demands very high prices (US\$11,000 per animal, Figure 15).

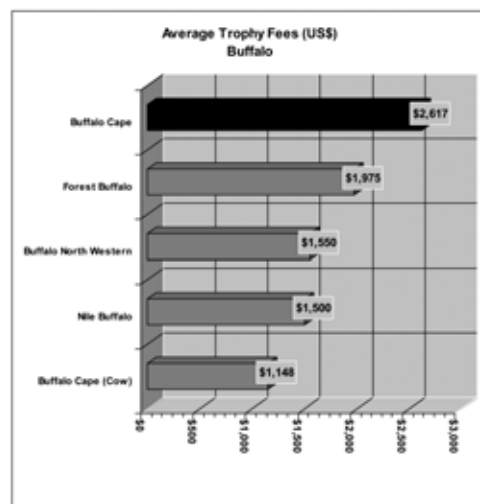


Figure 14: The average cost of Cape buffalo trophies, compared to specialist buffalo trophies offered in Cameroon (Forest), CAR (North Western), and Ethiopia (Nile, see Table 4)

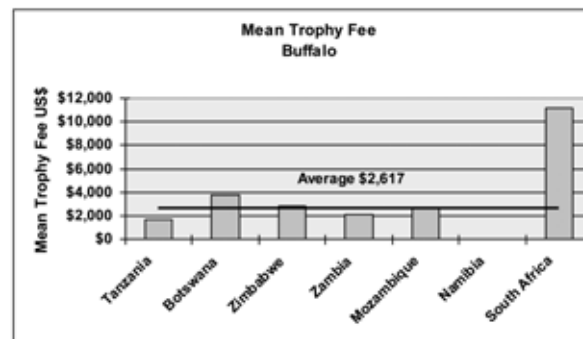


Figure 15: The average cost of Cape buffalo trophies across the region.

6.6 Plains Game

There is a wide range of plains game species available to the market across the region. These fall into different price ranges depending on their demand (e.g. sable), species speciality (e.g. bongo, gerenuk), availability (e.g. roan), abundance (e.g. kudu, impala and zebra) and trophy quality.

Tanzania has the widest range of species available - 47 (61 species if unusual animals such as python, otters, hyrax, galago, mongoose, scrub hares and zorillas that the Tanzania Wildlife Division includes on its trophy fee list) as a result of its diverse habitats that includes extensive wetlands, the miombo woodlands in the south and the northern maasailand grasslands. Many of the animals are only available in Tanzania (Gerenuk and Lesser Kudu for example), while others are regarded as specialist species for the discerning hunter (e.g. Abbot’s duiker).

The price for plains game trophies varies widely between outfitters and between countries. In Table 3 the various trophies have been segregated on the basis of the average cost while the individual average prices per trophy per country are provided in Table 4.

Relatively few specialist non-dangerous trophy animals fall into the top bracket (US\$3,000 – US\$6,000+), and include Southern Roan (the most expensive non-dangerous trophy animal – US\$7,750 in Namibia, Table 4), Mountain Nyala (from Ethiopia), Common Sable, Fringe-eared Oryx, Gerenuk, Bongo (from Cameroon) and Giant Eland (CAR).

A select group of primary trophies fall into the US\$2,000 – US\$2,600 bracket and include Sitatunga (available in Botswana, Tanzania and Zambia), Red and Black Lechwe (from Zambia), and Hartmann’s Zebra (Namibia and South Africa). These trophies are generally taken by hunting clients that have undertaken several safaris to Africa, and are looking for unusual or less common trophies.

The bulk of the plains game trophies that are commonly taken on big game safaris fall into the US\$1,000 – US\$1,900 category and include familiar animals such as Eland, Waterbuck, Southern Kudu, Gembok, Wildebeest, Zebra etc. (Table 3).

The remaining common plains game are priced from US\$950 (Bushbuck, Gazelles, Impala, etc.) to as low as US\$50 – US\$180 (Common Duiker, Baboon etc. Table 3).

7. COMPARISON OF HUNTING SAFARI PACKAGES

Hunting tourism is a unique business in which the hunting outfitter is required to provide all the services including ground transportation, accommodation, domestic air charters, actual trophy hunting, and finally preparation, packaging and shipping of trophies. This requires a unique marketing approach which is very personal, and is more akin to direct one-on-one executive recruitment as opposed to mass marketing through advertising. Clients are visited in their homes with tailored presentations where the final cost of a safari is negotiated depending on the availability of the area, dates and species to be hunted, the status of the booking sheet and reputation of the outfitter and/or professional hunter. These negotiations can take up to 18 months with the typical big game hunter paying over \$100,000 for a 21-day hunting experience, not including costs for any additional guests (observers, family etc.).

The data presented thus far highlights the wide variation in daily rate and trophy fees between countries. The hunter therefore has many options to choose from. In order to compare the overall cost of the various hunting packages on offer, a selection of “Big Game”, “Specialist”, “Primary”, “Secondary” and “Common” trophy species has been assembled in Table 5. From this selection a series of safari packages have been constructed using the average trophy fee, daily rate and number of days for a 28 – day classic, 21- day lion game, 14 – day leopard and 10 – day buffalo safari in each of the countries to provide the estimated overall basic cost of the safari (Table 6).

Table 5: Average trophy fee (US\$) for a selection of trophies available in each of the countries offering various hunting packages

Category	Trophy	Zambia	Tanzania	Botswana	Mozambique	Zimbabwe	South Africa	Namibia	Average
Big Game	Elephant ±60lb	-	16,000	19,000	24,500	14,000	-	-	10,500
	Lion	6,000	7,083	29,000	7,940	5,983	31,500	n/a	14,584
	Leopard	4,000	5,417	7,150	4,444	3,640	2,500	3,313	4,352
	Buffalo	2,133	1,650	3,744	2,734	2,822	11,175	n/a	4,043
Specialist	Roan	4,683	n/a	n/a	n/a	n/a	n/a	7,750	6,217
	Sable	4,425	3,067	3,000	3,630	3,394	9,750	7,250	4,931
Primary	Gerenuk	n/a	3,593	n/a	n/a	n/a	n/a	n/a	3,593
	Sitatunga	3,717	3,355	n/a	n/a	n/a	n/a	n/a	3,536
	Lesser Kudu	n/a	3,650	n/a	n/a	n/a	n/a	n/a	3,650
	Crocodile	1,950	2,025	4,592	2,296	3,120	n/a	n/a	2,796
	Hippo	1,983	1,917	n/a	3,055	2,833	2,850	n/a	2,528
Secondary	Nyala	n/a	n/a	n/a	2,650	2,450	2,253	n/a	2,451
	Eland	2,767	n/a	2,479	2,229	1,372	2,500	1,779	2,188
	Tsessebe	2,150	n/a	1,785	n/a	1,014	2,558	n/a	1,877
	Waterbuck	1,067	1,028	1,838	1,699	1,739	1,879	1,975	1,604
	Kudu	1,833	n/a	1,634	2,215	1,083	1,664	1,012	1,574
	Gemsbok	n/a	n/a	1,709	n/a	2,500	1,230	697	1,534
	Wildebeest	1,313	748	1,601	n/a	819	976	1,060	1,086
	Zebra	950	1,271	1,923	1,150	961	1,100	897	1,179
Common	Bushbuck	633	450	n/a	839	700	550	n/a	634
	Springbok	n/a	n/a	505	n/a	n/a	474	452	477
	Reedbuck	600	527	n/a	759	600	845	n/a	666
	Impala	283	300	523	329	248	392	624	385
	Puku	700	n/a	n/a	n/a	n/a	n/a	n/a	700
	Duiker	450	400	328	439	211	310	382	360
	Gazelle	n/a	567	n/a	n/a	n/a	n/a	n/a	567
	Bushpig	500	454	900	426	313	499	n/a	515
	Warthog	525	561	496	400	320	408	486	457
Dik Dik	n/a	342	n/a	n/a	n/a	n/a	n/a	342	

Using these parameters (and assuming that all the animals available are taken) the average overall cost of a classic 28-day elephant, lion, leopard and buffalo safari is approximately US\$116,000 with the most expensive combinations available in Zambia (~US\$140,000) and Tanzania (~US\$137,000) while the lowest cost is in Zimbabwe (~US\$87,000). This variation is a result of the greater availability of big game and specialist trophy species in these countries coupled with the generally higher daily rates and trophy fees. A similar trend is seen with the 21-day big game safari (elephant/lion/leopard/buffalo) safari packages, although the variation between the countries is not as significant, ranging from ~US\$111,000 to ~US\$81,000 (Mean = ~US\$98,000).

8. VALUE CHAIN OF THE COST OF HUNTING AFRICAN BIG GAME

The overall cost of 14-day lion/leopard/buffalo and 10-day buffalo/plains game safari is far more competitive between the different countries. Lion safaris were the most expensive in Botswana prior to the ban (~US\$84,000) while in South African (~US\$93,000) the high cost of buffalo and lion trophies pushed the price above the regional average of US\$70,000. Mozambique and Zimbabwe appear to be below the regional average as a result of lower average daily rates and trophy fees (Table 6).

The overall average cost of a 10-day buffalo and plains game safari in the region is ~US\$41,000. With the exception of Zambia (~US\$53,000) and Namibia (~US\$28,000), the remaining countries offer very similar prices ranging from ~US\$46,000 - ~US\$33,000 for this popular safari.

Table 6: The comparison of various safari hunting packages across the region.

	Classic Big Four Safari: Elephant, Lion, Leopard and Buffalo							
	Zambia	Tanzania	Botswana	Mozambique	Zimbabwe	South Africa	Namibia	Average
Daily rate	3,482	2,967	1,344	1,394	1,431	-	-	2,124
Days	28	28	25	28	26	-	-	27
Total	97,500	83,075	32,935	38,480	37,200	-	-	57,838
Trophy	42,663	54,404	82,207	61,733	50,123	-	-	58,226
Total	140,163	137,479	115,142	100,213	87,323	-	-	116,064

	21-day Safari Package: Combination of Elephant/lion/leopard and/or buffalo							
	Zambia	Tanzania	Botswana	Mozambique	Zimbabwe	South Africa	Namibia	Average
Daily rate	3,267	2,300	1,265	1,295	1,479	-	-	1,921
Days	21	21	21	22	21	-	-	21
Total	68,600	48,300	26,565	27,840	31,063	-	-	40,474
Trophy	42,663	54,404	82,207	61,733	50,123	-	-	58,226
Total	111,263	102,704	108,772	89,573	81,185	-	-	98,699

	14- day Lion/leopard and buffalo safari							
	Zambia	Tanzania	Botswana	Mozambique	Zimbabwe	South Africa	Namibia	Average
Daily rate	2,005	2,125	1,303	1,088	1,006	1,250	-	1,463
Days	14	14	16	15	15	14	-	15
Total	28,067	29,750	20,847	16,690	14,796	17,500	-	21,275
Trophy	42,663	38,404	63,207	37,233	36,123	75,413	-	48,840
Total	70,729	68,154	84,053	53,923	50,918	92,913	-	70,115

	10-day Buffalo and plains game safari							
	Zambia	Tanzania	Botswana	Mozambique	Zimbabwe	South Africa	Namibia	Average
Daily rate	2,073	2,078	1,567	878	909	536	450	1,213
Days	10	10	10	10	10	10	10	10
Total	20,725	20,777	15,084	8,600	9,088	5,363	4,500	12,019
Trophy	32,663	25,904	27,057	24,850	26,499	41,413	24,364	28,964
Total	53,388	46,680	42,141	33,450	35,587	46,776	28,864	40,984

A premium safari outfitter will offer his client the following services on a 28-day classic big game safari:

- Meet and greet and transfers to luxury accommodation on arrival.
- Facilitation of import permits for firearms and ammunition.
- 28 days of hunting plus full travel days to and from the hunting area.
- Facilitation of all Government fees (conservation fees, hunting licenses, area fees, and local taxes).
- All camp accommodations during the safari.
- Professional Hunter(s) services and trained safari staff services.
- Fully equipped 4-wheel drive vehicle (radio communications, winch, refrigerator, medical bag and a comprehensive set of tools and spares).
- Provision of all camp equipment and finest quality locally available foods, soft drinks and alcoholic beverages.
- Field preparation of trophies (skinning and salting) and transfer from the field.
- Dipping, processing, crating, packing, export documentation for trophies and transportation to the airport ready for export.
- Comprehensive first-aid kits in each camp.

The main components of an African big game safari are:

- a) Service charges and international travel to the hunting destination
- b) Marketing costs and internal country travel
- c) Payments in country for trophy licences/fees and daily rates
- d) Shipping of trophies and minimum taxidermy

Although the average cost of a classic 28-day safari may be approximately US\$116,000 there are other costs that are incurred at either end of the safari that can add another US\$35,000 to US\$45,000 to the final bill.

To demonstrate this, the approximate overall cost of various African Big Game hunting packages is provided in Table 7. Depending on which package is purchased, acquiring the various licenses (firearm, hunting license etc) and visa, and purchasing a business class ticket will absorb 7 – 20% of the overall cost of the hunt. A further 10% will be spent on covering agent commissions and internal charter to the hunting area. The actual hunting safari (daily rates and trophy fees) make up 50 – 65% of the final bill while a further 18 - 24% of the bill will be spent on shipping and taxidermy.

9. CONCLUSIONS

The safari hunting industry is regarded as being highly lucrative and as a result the expectations of both the producers and government wildlife agencies are that the industry “should pay more”. However the evidence suggests that the key instruments controlling the earning capacity of this highly competitive industry – daily rates and trophy fees – appear not to have increased significantly in last 5 years across the region. It is also argued by the industry that there is growing market resistance from the hunting client to the cost of hunting, especially for big game hunting, even though there is still considerable demand for hunting areas, and those that are in the business fiercely defend their concessions when these are due for renewal.

The question is therefore whether it is possible to influence the earning instruments of the industry? From the evidence available it would appear that the future growth of the industry does not lie in expanding the “big game” safari industry. Quotas are limited by the population status of the key game species (elephant, lion, leopard and buffalo), quality big game hunting areas are being reduced through increasing human settlement and agricultural development, and international regulations are making it increasingly difficult to access certain game species. These factors probably account for the static growth of the industry in countries such as Botswana, Tanzania and Zimbabwe.

It is the outfitters who are in a position to increase both the daily rates and trophy fees; however the pressure from competition between companies and countries, coupled with market resistance to increasing prices prevents this. Similarly wildlife authorities and producers are equally in a position to influence these rates, especially the trophy fees, either through increasing licence fees and/or reducing quotas. However, this strategy will only be successful if there is greater coordination and cooperation between the various countries, and there are better data upon which to base these decisions.

The one area where there is still considerable scope for expansion is through developing the plains game hunting industry, particularly in countries where this form of hunting is lacking (Tanzania for example). Although competition amongst outfitters offering this form of hunting is high, there is a greater volume of hunters who can afford plains game hunts that cost between US\$2,500 – US\$7,000 than those that can afford the big game safaris. In addition this form of hunting will sustain a greater spectrum of industries associated with wildlife management in general, as

is seen in South Africa, and provide opportunities for more local entrepreneurs to become involved in the industry, particularly at the community level. This, however, will depend on the appropriate economic incentives and wildlife management policies being in place, and the development of capacity.

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