A marketing & spending analysis of TROPHY HUNTERS

2015/16 season

TREES
tourism research
in economic environs
& society
the vanguard of tourism research

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1. INTRODUCTION

South Africa is a country with a very large diversity of animal species, especially game species. Wildlife tourism products such as game farm tourism are recognised as one of the cornerstones of South Africa's wildlife tourism industry and have shown extraordinary growth over the last 50 years. Wildlife tourism is defined as 'tourism that is based on encounters with non-domesticated animals, and the encounters can occur in either the animals' natural environment (for example, in a national park) or captivity' (for example, at a zoo). It includes both non-consumptive (for example, game viewing, hiking and walking safaris) and consumptive activities (for example, hunting and fishing) (Higginbottom 2004). One of the major contributors to wildlife tourism in South Africa is hunting (Bauer & Herr 2004; Saayman *et al.,* 2011), and is defined by Reynolds and Braithwaite (2001) as the consumptive use of wildlife in either natural habitat, semi-captured or farmed conditions.

In South Africa, hunting can be classified into the two main categories of trophy and biltong (local hunter) hunting. To be able to understand this industry and to determine the size thereof, research is needed in both the just-mentioned categories of hunting. As numerous research projects have been done in the past on the biltong or the local hunter in South Africa, the opposite is true regarding trophy hunting. Trophy hunting can be defined as the selective hunting of wild game animals where parts of the hunted animal are kept as a trophy or memorial. This is usually the skin, antlers and/or head, while the carcass itself is sometimes used for meat (Saayman *et al.,* 2009). To obtain a holistic view regarding hunters' profile and spending, consistent research is needed in both categories. It has been argued that trophy hunting generates millions of rands, which strongly contributes to the country's economy in revenue. Recent literature regarding this industry lacks, especially regarding the economic impact as well as the profile of these hunters. This will assist government, hunting organisations and product owners in making informed decisions that will assist the industry to grow, prosper and to develop better marketing strategies.

As a result, TREES (Tourism Research in Economic Environs and Society), in cooperation with PHASA (Professional Hunters of South Africa) decided to research the trophy hunting industry in South Africa, thereby filling a gap in the literature of this very large industry. This 2013 survey was the first of its kind and was followed by the 2015/16 survey. The latter was a hugely successful survey.

This research will be discussed in the rest of this research-based technical report.

2. RESEARCH AIMS

This research project had the following primary aims:

- To determine the profile of trophy hunters in South Africa.
- To determine the spending patterns of trophy hunters.
- To determine trophy hunters’ reasons for hunting.
- To determine trophy hunters’ hunting patterns.
- To estimate the economic impact of trophy hunting on South Africa.
- To determine the most popular species hunted and species that generate the highest income.
- To determine hunters’ view of hunting colour variants.

3. METHOD OF RESEARCH

The study was conducted using quantitative research during which a questionnaire was developed (from adapted questionnaires previously used) by TREES at the North-West University that measured the following aspects:

- Demographic data;
- Expenditure data;
- Hunting behaviour; and
- Hunting motivations.

The questionnaire was developed in Google Forms after which a link was created that was distributed by PHASA on their website. Respondents could willingly complete the questionnaire and submit it. The data was automatically captured by Google Forms. A total of 362 questionnaires were completed from October 2016 to June 2017 period, which is significantly more than the 147 completed in the 2013 report (between January and October 2013).

4. RESULTS

The following section illustrates the results obtained from the research.

SECTION A: SOCIO-DEMOGRAPHIC PROFILE

4.1 GENDER

The majority of respondents who took part in the 2015/16 survey were male (97%), which matches the results of the 2013 survey.

GENDER	2013	2015/16
Male	97%	97%
Female	3%	3%

DID YOU KNOW?
The average age of respondents was
61 years

4.2 AGE

The largest category of respondents in the 2015/16 survey was in the 61 years and older age range. This is followed by 23% in the 51 to 60 years (23%) and 41 to 50 years (12%) age ranges. Compared to the previous survey, it is clear that older respondents participated in the recent study. On average, respondents were 61 years of age.

GENDER	< 30 years	31-40 years	41-50 years	51-60 years	61+ years	Average
2013	1%	10%	17%	34%	30%	55.93 years
2015/16	1%	6%	12%	23%	58%	60.67 years

4.3 MARITAL STATUS

The majority of respondents (85%) indicated that they were married, followed by those who were single (6%) or divorced (6%). The results correlate well with the 2013 survey.

MARITAL STATUS	SINGLE	MARRIED	DIVORCED	WIDOW/ER	IN A RELATIONSHIP	LIVING TOGETHER
2013	7%	88%	3%	-	1%	-
2015/16	6%	85%	6%	1%	1%	1%

4.4 LEVEL OF EDUCATION

The largest group of respondents 41% had obtained a diploma or degree, followed by 30% who had obtained a post-graduate qualification and 19% who had obtained a professional qualification. Therefore, it is clear that the average hunters are well educated.

MARITAL STATUS	**NO SCHOOL**	MATRIC	DIPLOMA/DEGREE	POST-GRADUATE	PROFESSIONAL	OTHER
2013	-	14%	40%	19%	27%	-
2015/16	1%	8%	41%	30%	19%	1%

4.5 COUNTRY OF RESIDENCE

Respondents from the USA formed the majority with 86% of the sample, followed by 6% from Canada and 2% from South Africa. Other countries (3%) included Germany, Grenada, Ireland, Norway, Spain and Switzerland. It is clear that the biggest market remains the United States of America.

COUNTRY	**2013**	2015/16
Australia	-	1%
Canada	-	6%
Denmark	1%	1%
Namibia	1%	-
South Africa	9%	2%
UK	1%	1%
USA	88%	86%
Other	-	3%

DID YOU KNOW?
Most respondents
are from the USA

4.6 OCCUPATION

The largest groups of respondents either indicated that they were in professional occupations (42%) or they were pensioners (28%). This is followed by 8% who were self-employed, 7% who were working as technical staff and 5% who, respectively, were in managerial positions or sales personnel.

OCCUPATION	**2013**	**2017**
Professional	**51%**	**42%**
Manager	10%	5%

Self-employed	25%	8%
Technical	-	7%
Sales personnel	6%	5%
Administrative	3%	-
Civil service	-	3%
Education	1%	2%
Pensioner	-	28%
Student	-	0%
Farming	3%	-
Mining	1%	-

SECTION B: ECONOMIC IMPACT

4.7 SPOUSE/FRIEND ACCOMPANYING HUNTING TRIP TO SOUTH AFRICA

The majority of respondents (73%) did have a person accompanying them on their hunting trip. This is similar to the 2013 findings.

ACCOMPANYING PERSON	2013	2015/16
Yes	74%	73%
No	26%	27%

4.8 NUMBER OF PEOPLE ACCOMPANYING THE TRIP

Respondents accompanied by one other person accounted for 51% of the sample, followed by 14% who were, respectively, accompanied by two or three persons. On average, respondents were accompanied by two persons.

NUMBER OF PEOPLE	2015/16
None	5%
1 person	51%
2 people	14%
3 people	14%
4 people	6%
4+ people	10%
Average	2.05

DID YOU KNOW?
Respondents travelled in groups of 2 people, and also paid for 2.

4.9 NUMBER OF ACCOMPANYING HUNTERS

Half of the respondents (51%) had one hunter accompanying them on their 2015/2016 hunt, followed by 40% who had two to five other hunters accompanying them. On average, respondents had one other hunter accompanying them, which is fewer than the 2013 average.

NUMBER OF HUNTERS	2013	2015/16
None	24%	5%
1 person	30%	51%
2-5 people	38%	40%
6- 8 people	4%	4%
10+ people	4%	0%
Average	2.57	1.44

4.10 NUMBER OF PEOPLE FINANCIALLY RESPONSIBLE FOR IN THE GROUP

Most respondents were financially responsible for two to four persons (54%), followed by 37% who paid for one and 6% who were not financially responsible for anyone. On average, respondents were financially responsible for two persons. This virtually matches the 2013 average.

NUMBER OF PEOPLE	2013	2015/16
None	10%	6%
1 person	43%	37%
2-4 people	41%	54%
5-6 people	4%	3%
7+ people	2%	0%
AVERAGE	1.87	1.8

4.11 LENGTH OF STAY

Thirty-two percent (32%) of respondents indicated that they stay between 10 and 12 nights at the hunting destination, followed by 26% who stayed between seven and nine nights and 13% who stayed between 13 and 15 nights. On average, respondents stayed between 11 and 12 days, which is longer than the nine to 10 nights' average in 2013.

LENGTH OF STAY	2013	2015/16
None	1%	2%
1-3 nights	4%	0%
4-6 nights	12%	12%

7-9 nights	34%	26%
10-12 nights	34%	32%
13-15 nights	7%	13%
16-18 nights	6%	4%
19+ nights	2%	11%
AVERAGE	9.50	11.67

12 nights
The average length of stay at the hunt destination

4.12 NUMBER OF NIGHTS STAYED EXTRA

Those respondents who indicated that they stayed on extra nights before or after their hunt mostly stayed for one to three nights (44%), or between four and six nights (12%). Thirty percent (30%) stated that they would not stay any extra nights. On average, respondents stayed three days extra, which is an increase compared to the previous survey. The extra days were mainly spent travelling in South Africa. Therefore, it also contributed to other tourism products.

EXTRA NIGHTS	2013	2015/16
None	42%	30%
1-3 nights	39%	44%
4-6 nights	8%	12%
7-9 nights	6%	5%
10-12 nights	3%	4%
13+ nights	2%	5%
AVERAGE	2.52	3.21

4.13 SPENDING DURING HUNTING TRIP (EXCLUDING GAME HUNTED)

The highest spending categories included[1]:

From the table below, it is clear that transport cost (to South Africa) ($5 068.90 / R65 895.70), daily rates ($3 602.96 / R46 838.48) and shipping cost and trophy handling fees ($2 857.87 / R37 152.31) account for the highest spending categories for general spending (excluding game hunted). The total spending of trophy hunters in South Africa (excluding transport to South Africa as it is seen as a leakage as money is spent in the country of origin), amounts to $9 790.44 / R127 275.72. This amount excludes game hunted.

[1] Exchange rate used = 1 USD = 13 ZAR

ITEMS	2013	2015/16
Transport in South Africa (not included in daily fees)	$390.98	$612,54
Transport to SA	-	$5 068,90
Spending on SA Airlines	**$1 411.32**	-
Average daily rate	-	$310,60 x 11.6 nights = $3 602.96
Aspects not in daily rate	-	$630,27
Food	$63.80	$150,02
Ammunition	$53.07	$68,92
Clothing	$90.71	$139,21
Hunting gear, excluding ammunition	$150.18	$231,63
Shipping costs and trophy handling	**$2 789.35**	$2 857,87
Licenses and permits	$371.91	$512,70
Additional tours and travel costs	$629.06	$597,78
Other	$101.55	$386,55
TOTAL	**$6 051.93**	**$14 859.34**

- All prices displayed are in US$

4.14 SPECIES HUNTED

The total spending of hunters on game species hunted in South Africa amounts to $3 744 915.00 (R48.7 million). Therefore, the average amount spent on game species per respondent per season is $10 345.07 [$3 744 915 / 362 (number of respondents) = $10 345.07 / R134 485.91)].

GAME SPECIES	TOTAL ANIMALS (n)	TOTAL ANIMALS (%)	TOTAL AMOUNT ($)	AVERAGE PRICE ($)
Impala	354	10,44	84053,50	237,44
Warthog	276	8,14	51634,00	187,08
Springbuck	221	6,52	50545,00	228,71
Kudu	219	6,46	295820,00	1350,78
Blesbuck	218	6,43	68979,50	316,42
Zebra Burchell	163	4,81	139395,00	855,18
Gemsbuck	161	4,75	145225,00	902,02
Blue Wildebeest	158	4,66	102755,00	650,35
Bushbuck	120	3,54	93374,00	778,12
Nyala	116	3,42	213745,00	1842,63

Black Wildebeest	103	3,04	75551,00	733,50
Red hartebeest	100	2,95	81080,00	810,80
Waterbuck	89	2,62	132125,00	1484,55
Buffalo	82	2,42	585610,00	7141,59
Eland	81	2,39	132040,00	1630,12
Jackal	70	2,06	1850,00	26,43
Duiker Grey	64	1,89	17666,00	276,03
Sable	62	1,83	298300,00	4811,29
Baboon	61	1,80	4470,00	73,28
Reedbuck Mountain	61	1,80	31200,00	511,48
Steenbok	61	1,80	22400,00	367,21
Oryx	45	1,33	30850,00	685,56
Mountain Rhebuck	40	1,18	13290,00	332,25
Lion	40	1,18	391200,00	9780,00
Reedbuck common	38	1,12	24975,00	657,24
Ostrich	33	0,97	6125,00	185,61
Bush pig	28	0,83	11325,00	404,46
Caracal	28	0,83	16750,00	598,21
Lechwe	28	0,83	51400,00	1835,71
Klipspringer	27	0,80	26430,00	978,89
Roan	26	0,77	81000,00	3115,38
Bontebok	24	0,71	34451,00	1435,46
Duiker Blue	20	0,59	13701,00	685,05
Giraffe	19	0,56	41600,00	2189,47
Vaal Rhebuck	19	0,56	24350,00	1281,58
Civet	16	0,47	5775,00	360,94
Crocodile	16	0,47	54800,00	3425,00
Grey rhebuck	14	0,41	15750,00	1125,00
Tsessebe	14	0,41	33075,00	2362,50
Hippopotamus	12	0,35	40700,00	3391,67
Grysbok	12	0,35	9350,00	779,17
Oribi	10	0,29	9700,00	970,00
Rhino	10	0,29	40500,00	4050,00
Elephant	7	0,21	100500,00	14357,14
Honey badger	7	0,21	1650,00	235,71
Hyena Brown	5	0,15	0,00	0,00
Hyena spotted	5	0,15	5250,00	1050,00

Leopard	4	0,12	30500,00	7625,00
Suni	3	0,09	2100,00	700,00
Cheetah	1	0,03	0,00	0,00
TOTAL	3391	100	$3 744 915,00	

- Total = number of species hunted x average price
- All prices displayed are in US$

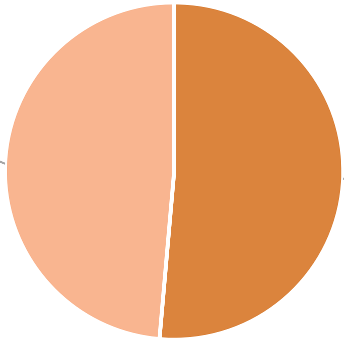
The top five game species that were hunted in 2015/16 include impala, warthog, springbuck, kudu and blesbuck. The top five game species that generated the most income were buffalo, lion, sable, kudu and Nyala.

TOP 10 HUNTED 2013	TOP 10 INCOME EARNERS 2013	TOP 10 HUNTED 2015/16	TOP 10 INCOME EARNERS 2015/16
1. Springbok	1. Lion	1. Impala	1. Buffalo
2. Impala	2. Kudu	2. Warthog	2. Lion
3. Kudu	3. Buffalo	3. Springbuck	3. Sable
4. Blesbok	4. Springbok	4. Kudu	4. Kudu
5. Black Wildebeest	5. Zebra	5. Blesbuck	5. Nyala
6. Blue Wildebeest	6. Blue Wildebeest	6. Zebra Burchell	6. Gemsbuck
7. Warthog	7. Nyala	7. Gemsbuck	7. Zebra Burchell
8. Zebra	8. Black Wildebeest	8. Blue Wildebeest	8. Waterbuck
9. Oryx	9. Eland	9. Bushbuck	9. Eland
10. Red Hartebeest	10. Blesbok	10. Nyala	10. Blue Wildebeest

4.15 TOTAL SPENDING

R1.98 billion
The approximate contribution of trophy hunting to the South African economy

The average spending of trophy hunters including game hunted and general spending in South Africa amounts $20 135.51 (R261 761.63) (excluding travel cost to SA $5 068.90). If this is multiplied by the number of respondents (362), it amounts to $7 289 054.62 (R94 757 710.06). The total economic contribution of trophy hunting to the South African economy is, therefore, $130 880 815.00 (7 600 hunters x $20 135.51) or R1.989 billion (R1 989 388 388.00). Therefore, trophy hunters spend a total of R1 02 Billion (R1 022 092 916.00) on game hunted (7 600 hunters x R134 485.91) and R967 Million (R967 295 472) on general aspects (7 600 x R127 275.72).



❖ All prices displayed are in US$

SECTION C: HUNTER BEHAVIOUR

4.16 HUNTING ORGANISATIONS

Respondents were asked to indicate to which hunting organisations they belong. The following organisations were most mentioned:

- Safari Club International
- National Rifle Association, USA
- Ducks Unlimited
- Dallas Safari Club
- Rocky Mountain Elk Foundation
- Cape Hunters Association South Africa (CHASA)
- Foundation for North American Wild sheep
- North American Hunting Club
- Professional Hunters' Association South Africa (PHASA)

4.17 HEARD ABOUT OUTFITTER

In the 2015/16 survey, it was shown that trade shows (34%), word-of-mouth (34%) and the internet (31%) were respondents' main sources of information on hunting outfitters. A significant increase in the importance of the internet as a source of information is observed in 2015/16.

MEDIA	**2013**	2015/16
Trade show	32%	34%

Word-of-mouth	30%	34%
Hunt donation (for example SCI trade show)	18%	11%
Internet	8%	31%
Hunting magazine	3%	8%
Private function organised by outfitter	2%	2%

*Please note that percentage will not add up to 100%

4.18 TAXIDERMY

4.18.1Taxidermy services used

About the taxidermy services used by respondents, 51% indicated that dip and ship, and 51% indicated that all was done by South African taxidermies and twenty percent (20%) had taxidermy done in the country of origin.

TAXIDERMY SERVICES	**2013**	2015/16
Dip and ship to be done in country of origin	38%	51%
All done by South African taxidermy	62%	51%
Taxidermy to be done in country of origin	-	20%

*Please note: Percentages will not add up to 100% as respondents could indicate more than one option

4.18.2Value of taxidermy

When comparing the taxidermy services of South Africa with that of the country of origin, the findings were similar. In both instances, the largest groups of respondents rated South African taxidermy services as good (39% and 36%, respectively) or as very good (26% and 29%, respectively).

TAXIDERMY SERVICES	SOUTH AFRICA	COUNTRY OF ORIGIN
Very good value	26%	29%
Good value	39%	36%
Fair	24%	27%
Poor value	6%	5%
Very poor value	5%	4%

4.18.3 Percentage of each service used

Respondents were asked to indicate what percentage of their trophies get dipped and shipped and what percentage is sent to taxidermy. Half of the respondents (54%) sent trophies for taxidermy, and also half (50%) had trophies dipped and shipped.

TAXIDERMY SERVICES	PERCENTAGE
Trophies dip and shipped	50%
Sent to taxidermy	54%

4.19 TOTAL NUMBER OF TROPHIES COLLECTED DURING CAREER

The largest group of respondents (44%) collected between one and ten trophies, followed by 30% who collected between 11 and 20 and 16% between 21 and 30 trophies, during their hunting career.

NUMBER OF TROPHIES	**2013**	2015/16
None	1%	-
1-10 trophies	54%	44%
11-20 trophies	25%	30%
21-30 trophies	8%	16%
31-40 trophies	4%	6%
41-50 trophies	2%	4%
51 + trophies	6%	1%
Average	18	15.81

4.20 PREFERRED PROVINCE TO HUNT IN

Respondents were asked to indicate on a nine-point scale (where ‘1’ = most preferred, and ‘9’ = least preferred) in which province they prefer to hunt – the smaller the average out of nine, the more preferred the province is. The most preferred provinces for respondents to hunt in, in South Africa included:

1. Limpopo (2.69);
2. Eastern Cape (3.16); and
3. North West (3.83).

Limpopo and the Eastern Cape were also the most preferred provinces to hunt in 2015/16. When compared to the previous survey, KwaZulu-Natal as preferred province for hunt has declined. The top five provinces for hunting in 2013 were: 1. Limpopo; 2. Eastern Cape; 3. KwaZulu-Natal; 4. Northern Cape and 5. North West.

RATING	PROVINCE	MEAN VALUE
1.	Limpopo	2.69
2.	Eastern Cape	3.16
3.	North West	3.83
4.	Northern Cape	4.02
5.	Free State	4.19
6.	KwaZulu-Natal	4.24
7.	Mpumalanga	4.88
8.	Western Cape	5.02
9.	Gauteng	5.89

DID YOU KNOW?
Limpopo is the most preferred province to hunt in

4.21 REASONS WHY SOUTH AFRICA WAS CHOSEN AS HUNTING DESTINATION

Respondents were asked to provide reasons for why they selected South Africa as a hunting destination. The most mentioned reasons included:

- **Affordable**
- **Best value for money**
- **Animals availability**
- **Variety of species**
- Convenient
- Accessible
- Safe country
- Good reputation (and reviews)
- Good service
- Professional outfitters
- Good previous experience

4.22 PERCEIVED SAFETY

The table illustrates the perceived safety of respondents regarding tourism in South Africa. In general, respondents felt that South Africa is a relatively safe hunting destination.

All aspects were rated as *relatively safe* to *very safe:*

1. At the game ranch or hunting concessions area (92%);

2. Tourism attractions visited (98%);
3. At the airports in South Africa (97%);
4. While travelling in South Africa (96%).

A larger percentage of respondents visiting cities felt unsafe (12%). When compared to the previous survey, it is clear that respondents feel safer now.

SAFETY ASPECTS	2013			2015/16		
	NOT AT ALL SAFE	RELATIVELY SAFE	VERY SAFE	NOT AT ALL SAFE	RELATIVELY SAFE	VERY SAFE
At the airports in South Africa	3%	53%	43%	3%	47%	50%
At the game ranch or hunting concessions area	8%	91%	1%	0%	8%	92%
While travelling in South Africa	4%	59%	37%	4%	56%	40%
Cities visited	14%	66%	20%	12%	64%	24%
Tourism attractions visited	1%	57%	41%	2%	51%	47%

4.23.1 NUMBER OF TIMES HUNTED IN COUNTRIES OTHER THAN SOUTH AFRICA

Almost half of the respondents (47%) indicated that they did not hunt in a country other than South Africa in the past year, followed by 28% who did hunt in another country once and 12% who hunted twice. On average, respondents hunted in other countries once, which is significantly fewer times than in the previous survey.

NUMBER OF TIMES	2013	2015/16
0 times	35%	47%
1 time	27%	28%
2 times	18%	12%
3 times	7%	7%
4 times	2%	2%
5 times	3%	1%
6 times	1%	1%
7 times	1%	-
8+ times	6%	2%
AVERAGE	3 times	1.19 times

4.23.2 OTHER COUNTRIES HUNTED IN

Other countries that respondents preferred to hunt in included the USA (31%), Canada (20%), New Zealand (7%), Namibia and Zimbabwe (5%, each).

COUNTRIES	PERCENTAGE
USA	31%
Canada	20%
New Zealand	7%
Zimbabwe	5%
Namibia	5%
Mexico	4%
Argentina	4%
Scotland	3%
Spain	2%
Australia	2%
Ireland	1%
Poland	1%
Russia	1%
France	1%
Mozambique	1%
Germany	1%

*Please note that percentage will not add up to 100% as respondents could indicate more than one option

4.24 RETURN TO SOUTH AFRICA FOR HUNTING

Seventy-nine percent (79%) of respondents indicated that they would return to South Africa to hunt here again, while 17% will not return.

RETURN?	2015/16
Yes	79%
No	17%
Not sure	4%

DID YOU KNOW?
79% will return to South Africa to hunt

4.25 VALUE FOR MONEY

At least half of the respondents (50%) indicated that they strongly agree that their hunting trip was value for money, while 38% agreed and 9% felt neutral. Only 2% strongly disagreed.

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
My 2015/2016 hunting experience was value for money	2%	1%	9%	38%	50%

SECTION C: HUNTING BEHAVIOUR

4.26 HUNTING METHOD

Stalking remains respondents' preferred hunting method (72%), followed by hunting mostly from a vehicle (19%) and hunting from hides (6%). The results correlate well with the previous survey's results.

PREFERRED HUNTING METHOD	Mostly from a vehicle	Stalking	Lie and wait	Hides	Pertinent bow	Other
2013	13%	72%	4%	3%	6%	2%
2015/16	19%	72%	3%	6%	-	-

4.27 WHY HUNTERS ENJOYED HUNTING IN 2015/16

Three reasons had to be given why respondents enjoyed hunting in South Africa during 2015/16. The following reasons were mentioned most:

- Beautiful country
- Landscapes
- Great weather
- The sounds and smells
- Great animals and abundance of game
- Dangerous game
- Braai
- Good people
- Get to spend time with friends
- Conservation

- It was a bucket list place to visit
- Value for money
- Easily accessible
- Good family experience
- My expectations were met
- Professional PH
- It is fun

4.28 LION HUNTING

4.28.1 Consider hunting captive-bred lions

The majority of respondents had not considered hunting captive-bred lions (73%), while 27% did. There has been a 2% increase in the percentage of respondents who consider hunting captive-bred lions.

CONSIDERED HUNTING?	2013	2015/16
Yes	23%	27%
No	77%	73%

Those who indicated that they would not hunt lions included reasons such as:

- I will not hunt cats after the previous year's fiasco in the US over a hunted lion
- I do not want to disrupt a pride
- I do not like the idea
- I do not believe in captive-bred lion hunting
- One should not hunt top predators
- I will not hunt an animal that there is not enough of

4.28.2 Information on captive-bred or free ranging lions

Of those respondents who did hunt lions, 56% were not informed by the outfitter or PH whether the lions were captive-bred or free ranging. Only 44% were made aware. More respondents were aware of where the lions came from in 2015/16 than in 2013.

INFORMED BY PH?	2013	2015/16
Yes	32%	44%
No	68%	56%

4.29 SOUTH AFRICA AS HUNTING DESTINATION

In this question, respondents had to state their level of agreement on a five-point Likert scale (where '1' = strongly agree and '5' = strongly disagree) about aspects that rate South Africa as a hunting destination. Respondents mostly agreed with the following statements as they had obtained the lowest mean averages:

- There is a variety of game to hunt (1.14);
- There is a variety of hunting products (farms/ranches/game/reserves) to choose from to hunt at (1.25);
- Quality game are available to hunt (1.30);
- A variety of hunting packages are available (1.37); and
- I am able to hunt the animals that I planned to hunt (1.42).

Respondents remain undecided pertaining to 'importing fire-arms trouble free' (2.67).

HUNTING DESTINATION ASPECTS	MEAN VALUE	LEVEL OF AGREEMENT
There is a variety to game to hunt	1,14	Strongly agree
There is a variety of hunting products (farms/ranches/game/reserves) to choose from to hunt at	1,25	Strongly agree
Quality game are available to hunt	1,30	Strongly agree
The trophy quality of the game is of high standard	1,42	Strongly agree
I am able to hunt the animals that I planned to hunt	1,39	Strongly agree
The country is easily accessible by air	1,42	Strongly agree
Hunting products (farms/ranches/reserves) are easily accessible by road	1,45	Strongly agree
Importing fire-arms trouble free	2,67	Undecided
Obtaining different hunting permits I trouble free	2,21	Agree
Exporting of trophies is trouble free	2,30	Agree
Hunting operators (OH) deliver a high standard product	1,57	Agree
Hunting outfitters (HO) are professional	1,50	Agree
Professional hunters (PH) are skilled, qualified and professional	1,43	Strongly agree
Hunting facilities (accommodation, shooting ranges, taxidermies, skinning facilities) are of a high standard	1,59	Agree
Hunting in this country is an authentic experience	1,72	Agree
I experience a true African safari	2,07	Agree
The government structures involved in the hunting fraternity are well organised	2,44	Agree
It is a safe destination to hunt	1,88	Agree
The people of the country are in general very hospitable	1,66	Agree
A variety of hunting packages are available	1,37	Strongly agree

A variety of other tourism products (national parks, resorts, coastal areas, shopping, tourism events) are available	1,47	Strongly agree
Hunting products (farms, ranches and reserves) where I hunt provide a variety of activities, such as game drives, 4x4 trips, horse riding etc.	1,96	Agree
Other tourism-related services are readily available such as banks, shops, hospitals and telecommunication	1,94	Agree

4.30 RIFLE OWNERSHIP

Respondents preferred to use their own rifles when hunting in South Africa (75%), while 25% made use of rifles provided to them by the outfitter. There has been an increase in the number of respondents who make use of their own rifles when compared to the previous study. This can be because the handling of rifle imports at OR Tambo International Airport has improved.

RIFLE OWNERSHIP	2013	2015/16
Own	70%	75%
Provided	30%	25%

SECTION D: PERCEPTIONS ON COLOUR VARIANT SPECIES

4.31 UNDERSTANDING OF ANIMAL COLOUR VARIANTS

This question was used to measure respondents' understanding of animal colour variants. Respondents agree to strongly agree with the statement 'it is colour variant animals that occur in nature' (72%), while they felt mostly undecided about the statements 'it is animals that are manipulated artificially' (30%), and 'animals that fall into the same category as your more expensive game species such as nyala, tsessebe and lechwe' (44%). Many respondents provided other perceptions such as:

- It is completely artificial and should not be allowed
- Colour variants have no conservation value

IT IS…	STRONGLY AGREE	AGREE	UNDECIDED	DISAGREE	STRONGLY DISAGREE
Animals that are manipulated artificially	8%	18%	30%	23%	21%
Colour variant animals that occur in nature	32%	40%	19%	5%	4%
Animals that fall into the same category as	11%	28%	44%	10%	7%

your more expensive game species such as nyala, tsessebe and lechwe			

4.32 HUNTED COLOUR VARIANT ANIMALS

The majority of respondents (68%) did not hunt colour variants, while only 32% did.

HUNTED VARIANTS	2015/16
Yes	32%
No	68%

Respondents had to provide reasons why they did not hunt colour variant animals. The following were the main reasons why they did not want to hunt them:

- I do not feel that colour variants are normal
- It is a marketing gimmick
- Poor forced breeding behaviour
- I only like to hunt natural animals
- Not interested in colour variants
- I do not like the unnatural appearance
- Have not had the opportunity to do so

Most respondents did not hunt colour variants

4.33 ANIMAL VARIANT SPECIES HUNTED

In this question, respondents were asked to indicate what colour variants of various animal species they have hunted. Please note that the percentage does not apply to the whole respondent sample, but solely to those who did hunt colour variants.

4.33.1 Springbuck

The majority prefer hunting black springbuck (83%), followed by white (68%) and copper (48%).

SPRINGBUCK	2015/16
Black	83%
White	68%
Copper	48%
Multi-coloured	18%

4.33.2 Blesbuck

The white blesbuck was the most hunted colour variant (82%), followed by copper (15%), and saddle back (12%).

BLESBUCK	2015/16
White	82%
Yellow	3%
Copper	15%
Saddle back	12%

4.33.3 Blue wildebeest

When looking at the blue wildebeest varieties, 70% have hunted the golden wildebeest with 30% who indicated the Kings wildebeest.

BLUE WILDEBEEST	2015/16
Golden	70%
Kings	30%

4.33.4 Oryx (Gemsbuck)

The red oryx was the most popular (80%), followed by the golden oryx (40%).

ORYX	2015/16
Golden	40%
Red	80%

4.33.5 Impala

Half of the respondents who have hunted impala colour variants hunted the black impala (50%), followed by 40% who hunted the white flank (40%) and the saddle back (13%).

IMPALA	2015/16
Black	50%
White	7%
White flank	40%
Saddle back	13%

4.34 REPEAT COLOUR VARIANT HUNTS

The majority of respondents (79%) who had hunted colour varieties previously indicated that they would do so again in future.

REPEAT HUNTS	2015/16
Yes	79%
No	21%

4.35 BREEDING OF COLOUR VARIENTS AS ACCEPTABLE PRACTICE

When asked whether respondents see the breeding of colour variant species as an acceptable practice, 41% indicated that it is acceptable, while 36% were unsure and 23% did not see it as acceptable.

ACCEPTABLE PRACTICE?	2015/16
Yes	41%
No	23%
Not sure	36%

4.36 HUNT OF COLOUR VARIANTS AT CURRENT PRICES

Only 35% of respondents indicated that they would pay current prices, while 65% would not.

HUNT AT CURRENT PRICES?	2015/16
Yes	35%
No	65%

4.37 CONSERVATION VALUE OF COLOUR VARIANTS

Half of the respondents (50%) did feel that the colour variant animals do have conservation value, while 50% did not.

DO THEY HAVE CONSERVATION VALUE?	2015/16
Yes	50%
No	50%

4.38 REASONS FOR HUNTING COLOUR VARIANT ANIMALS

Respondents were asked to indicate on a five-point Likert scale (where ‘1’ = strongly agree and ‘5’ = strongly disagree) to what extent they agree with statements about the reasons why respondents hunt colour variant animals. Respondents agree to strongly agree with the following statements:

- To hunt a variety of species (89%);
- For trophy purposes (skin and horns) (86%); and
- Opportunities to hunt at a good price (78%).

	STRONGLY AGREE	AGREE	UNDECIDED	DISAGREE	STRONGLY DISAGREE
For trophy purposes (skin and horns)	43%	43%	8%	2%	4%
To hunt a variety of species	49%	40%	7%	3%	1%
Opportunities to hunt at a good price	31%	47%	13%	6%	3%

4.39 LEVEL OF AGREEMENT TOWARDS HUNT STATEMENTS

Respondents were asked to indicate on a five-point Likert scale (where '1' = strongly agree and '5' = strongly disagree) to what extent they agree with statements about hunting. Respondents agree to strongly agree with the following statements:

1. The hunting of animals that are bred in small camps harms the reputation of the hunter and hunting (57%);
2. The use of growth stimulants and supplements and/or antibiotics influences the perception of venison as "natural product" (55%);
3. Hunting of colour variants has an impact on the availability of hunting packages for "ordinary hunt" (45%);
4. A green certification system will help to distinguish between responsible hunting and other forms (42%); and
5. Growth stimulants have a negative impact on the conservation of game (43%).

	STRONGLY AGREE	AGREE	UNDECIDED	DISAGREE	STRONGLY DISAGREE
The hunting of animals that are bred in small camps harms the reputation of the hunter and hunting	23%	34%	21%	18%	4%
The use of growth stimulants and supplements and/or antibiotics influences the perception of venison as "natural product."	24%	33%	21	14%	8%
A green certification system will help to distinguish between responsible hunting and other forms	15%	27%	42%	11%	5%
Growth stimulants have a negative impact on the conservation of game	20%	23%	36%	17%	4%
Hunting of colour variants has an impact on the availability of hunting packages for	9%	22%	45%	17%	7%

"ordinary hunt."			

4.40 FUTURE OF HUNTING COLOUR VARIANT ANIMALS

Respondents either somewhat (43%) or to a great extent (43%) agreed that there is a future in hunting colour variants.

	TO A GREAT EXTENT	SOMEWHAT	VERY LITTLE	NOT AT ALL
There is a future in hunting colour variants	43%	43%	8%	2%

5. CONCLUSIONS AND RECOMMENDATIONS

5.1 CONCLUSIONS

The table below summarises the profile of trophy hunters to South Africa for the two surveys.

APECTS	2013	2015/16
GENDER	Male (97%); Female (3%)	Male (97%); Female (3%)
AGE	55.93	60.67
MARITAL STATUS	Married (89%); Single (7%)	Married (85%); Single (6%); Divorced (6%)
LEVEL OF EDUCATION	Diploma/ degree (40%); Professional (27%)	Diploma/ degree (41%); Post-graduate (30%)
COUNTRY OF RESIDENCE	United States of America (88%); South Africa (9%)	United States of America (86%); Canada (6%)
OCCUPATION	Professional (51%); Self-employed (25%)	Professional (42%); Pensioners (28%).
HUNTING ORGANISATIONS	Safari Club International National Rifle Association, USA Rocky Mountain Elk Foundation Cape Hunt and Conservation Dallas Safari Club	Safari Club International, National Rifle Association, USA, Ducks Unlimited, Dallas Safari Club
HEARD ABOUT OUTFITTER	Trade shows (32%); Word of mouth (30%)	Trade shows (34%); Word of mouth (34%)
TAXIDERMY	All done by South African taxidermists	All done by South African taxidermists; Dip and ship to be done in country of origin
NUMBER OF TROPHIES COLLECTED DURING HUNTING CAREER	18 trophies	15.81 trophies
PREFERRED PROVINCE TO HUNT AT	Limpopo Eastern Cape KwaZulu-Natal Northern Cape North West	Limpopo Eastern Cape North West Northern Cape Free State
SPOUSE/FRIEND ACCOMPANYING HUNTING TRIP TO SOUTH AFRICA	Yes (74%)	Yes (73%)
NUMBER OF PEOPLE ACCOMPANYING THE	-	2 people

TRIP		
NUMBER ACCOMPANYING HUNTERS	2.57 hunters	1.44 hunters
NUMBER OF PEOPLE FINANCIALLY RESPONSIBLE FOR IN THE GROUP	1.87 people	1.8 people
LENGTH OF STAY	9.50 nights	11.67 nights
NUMBER OF NIGHTS Stayed EXTRA	2.52 nights	3.21 nights
REASONS WHY SOUTH AFRICA WAS CHOSEN AS HUNTING DESTINATION	The variety of game available Convenience Costs and pricing Safety Recommended by friends and families	Affordable Best value for money Variety of species Animal availability
Areas saw as safe	Tourism attractions visited At the airports in South Africa Cities visited While travelling in South Africa At the game ranch or hunting concession area	At the game ranch or hunting concession area Tourism attractions visited At the airports in South Africa While travelling in South Africa
NUMBER OF TIMES HUNTED IN SOUTH AFRICA OVER THE PAST YEAR	Once	Once
SPENDING DURING HUNTING TRIP	$6 051.93	$14 859.34
TOTAL DAILY FEES	$3 336.90	$3 602.96
TOTAL SPENDING ON GAME HUNTED	$7 891.40	$10 345.07
AVERAGE SPENDING OF TROPHY HUNTERS TO SOUTH AFRICA	R138 241.81 ($17 280.00)	R261 761.63 ($20 135.51)
TOTAL ECONOMIC VALUE OF TROPHY HUNTING	R1.24 billion	R1.989 billion
RETURN TO SOUTH AFRICA FOR HUNTING	-	Yes (79%)
VALUE FOR MONEY	-	50% strongly agree that hunting experience in SA was value for money

HUNTING METHOD	Stalking	Stalking
HUNT DESTINATION ASPECTS	-	1. There is a variety of game to hunt 2. There is a variety of hunting products (farms/ranches/game/reserves) to choose from to hunt at 3. Quality game are available to hunt 4. A variety of hunting packages are available 5. I can hunt the animals that I planned to hunt
HUNTING CAPTIVE BRED LIONS	No (77%)	No (73%)
INFORMED REGARDING LION HUNT	No (68%)	No (56%)
RIFLE Used	Own rifle (70%)	Own rifle (75%)
UNDERSTANDING OF ANIMAL COLOUR VARIANTS	-	It is completely artificial and should not be allowed Colour variants have no conservation value
HUNTED COLOUR VARIANT ANIMALS	-	No (68%)
REPEAT COLOUR VARIANT HUNTS	-	Yes (79%)
BREEDING OF COLOUR VARIENTS AS ACCEPTABLE PRACTICE	-	Yes (41%)
HUNT COLOUR VARIENTS AT CURRENT PRICES	-	No (65%)
CONSERVATION VALUE OF COLOUR VARIANTS	-	Yes (50%) – they do have conservation value
REASONS FOR HUNTING COLOUR VARIANT ANIMALS	-	To hunt a variety of species For trophy purposes Opportunities to hunt at a good price

5.2 RECOMMENDATIONS BY RESPONDENTS

The following recommendations were made by respondents regarding trophy hunting in South Africa:

- Educate environmentalists about how conservation truly works
- Breeding colour variants raises the risk of losing original species – do not do it

- Do not in-breed animals
- Prices for variants should be cheaper. Breeders are becoming greedy.
- Allow colour variants. Some hunters prefer it; some do not.
- Natural, free-ranging trophies have much more value than unnatural animals
- Keep the prices low so that more hunters might enjoy hunting
- The fire-arm regulations should be lightened.
- Re-open the importation of lions into the USA

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