

CHAPTER 4

SURVEYING TOURIST PROFILES AND SATISFACTION WITH THE KNP TOURISM FACILITIES AND SERVICE DELIVERY

The objective of this chapter is to present results of three surveys conducted to measure the various elements of the existing KNP tourism and recreational value system. The sub-objectives of the surveys were to:

- determine the demographics of tourists to the KNP in order to construct their profiles for general tourism planning purposes;
- identify the motivation (personal values) behind tourists' choice of the KNP as their holiday destination;
- measure tourists' satisfaction levels with current product mix, quality, standards and conservation ethos from the front office, housekeeping and back of office;
- determine tourists' views on commercialization and the possibilities of outsourcing the KNP's rest camp accommodation system to private service providers; and
- obtain general qualitative comments on future improvements of service levels, community relations, products and any other park activity to enhance tourist experience.

The findings of these surveys, and information gleaned from the literature study, formed the basis for the proposed integrated tourism management framework (see 6.3).

4.1 TOURIST SURVEY

4.1.1 Rationale for the survey

The KNP is already a matured tourism product with 77 years of existence since the introduction of tourism in 1927. Although its product mix constitutes an important link in the chain of the total experience, it has never been scientifically evaluated whether it meets the satisfaction levels of its clients or the norms and standards of the broad tourism sector. It is therefore imperative to determine the KNP's tourist demographics and the relevance and popularity of its product mix with its consumers in order to effect adjustments that will

eventually be considered when drafting a tourism management framework. In 2002/03 there were aggressive changes aimed at streamlining the KNP's tourism and recreational values to improve service delivery and enhance product quality, but unfortunately this was done without any scientifically constructed situation analysis. It is imperative for management to obtain information on what the various stakeholders think about the products and the changes that are unfolding.

4.1.2 Objectives of the survey

- to determine the demographics of tourists to the KNP;
- to measure customer satisfaction levels on the existing product mix and range;
- to measure perceptions on commercialization; and
- to establish factors which constitute the identity of the KNP as a strong brand.

4.1.3 Research method

4.1.3.1 Data collection process

The data was collected by means of an extensive paper-and-pencil type questionnaire that was completed by the tourists. Field workers and various KNP hospitality and duty managers were responsible for the distribution of the questionnaires to the tourists. Care was taken that the participants understood the instructions and were satisfied that their responses would remain anonymous. They were allowed to complete the questionnaires in private and when it suited them. They were also given the opportunity to ask questions about any aspect of the study that they wished clarified. Completed questionnaires were collected from the participants and returned for data capturing.

4.1.3.2 Sample

A convenience sample³⁴ consisting of 836 tourists (N=836) to the KNP between 2 December 2002 and 31 January 2003 was used in this survey. The tourists participated voluntarily in the survey, because they agreed to complete a tourist questionnaire when approached by a field worker or camp management staff. In general, the response of the tourists was very positive, because very few were unwilling to participate. Approximately 80 % of the sample completed the questionnaires during December 2002 and the remaining 20 % completed the questionnaires during January 2003.

³⁴ A convenience sample was due to the availability and preparedness of respondents to complete questionnaires.

4.1.3.3 Measuring instruments

4.1.3.3.1 PILOT STUDIES

Two pilot studies were undertaken during May and November 2002 to develop and improve the questionnaire that was used for the present survey. The objectives of the pilot studies were to test the format of the questionnaire in terms of item contents and response format, to ensure that the final questionnaire met the highest psychometric standards, to determine whether the biographical information required was understood by the participants, was not offensive to them and to establish whether the lengthy questionnaire could be completed within a time span that would not exhaust the participants nor lessen their motivation.

4.1.3.3.2 QUESTIONNAIRES

The quantitative data and qualitative remarks obtained from the participants during the pilot surveys on a total sample of 349 tourists were studied to determine whether the questionnaire could be improved technically or made more user-friendly. The items of the various subscales were subjected to first-order and second-order exploratory factor analyses using the principal axis factoring method and rotating the factor axes to simple structure. This procedure was followed to ensure the unidimensionality of the subscales. Internal consistency reliabilities were also determined for every subscale by calculating Cronbach alpha coefficients³⁵. These analyses led to minimal adjustments of the item contents. The expected high level of education of the tourists led the researcher to believe that a seven-point response format would be suitable for the participants and also yield the most reliable results. This strategy proved to be valid, but an adjustment was made in the main study for reasons mentioned below.

The final questionnaire consisted of 13 pages (see Annexure 6), the first of which contained general information about the objectives of the study and requested the participants to indicate the camp for which they would complete the questionnaire. Thereafter followed one page on which biographical information and information regarding their visit to the KNP had to be given.

The remaining pages of the questionnaire contained 120 items of six subscales that were used to test various hypotheses of the research project. The sets of items making up each

³⁵ Chronbach alpha coefficient is an estimate of consistency of responses to different scale items (Tredoux & Durrheim, 2002).

subscale was followed by a space that could be used by the participants to record specific qualitative comments about the particular area of service offered by the KNP. It was hoped that the qualitative comments would lead to valuable information about service aspects that were not fully covered by the structured questionnaire items. The experience gained during the pilot studies indicated clearly that South Africans who are regular tourists experience feelings about a national asset that they wish to express in their own words.

The six subscales in the questionnaire each consisted of a number of items that were designed to measure the perceptions of the respondents about particular service areas in the KNP. They were the following:

General: This subscale consisted of 27 items regarding the 'Kruger experience' in general. For instance, the items measured perceptions regarding commercialization, identity of the KNP, wilderness qualities, game drives, roads, picnic spots, crowding, entertainment, conservation and information services.

Cafeteria: The cafeteria subscale consisted of 21 items regarding the location of the cafeteria, the atmosphere in the cafeteria, the food served, the service rendered, and the pricing of food items.

Restaurant: The restaurant subscale also contained 21 items that measured the same perceptions as the Cafeteria subscale.

Shop: The shop subscale consisted of 19 items measuring perceptions regarding the location of the shop, its atmosphere, the service rendered and the goods on offer. In particular, some items focused on the variety and quality of the shop goods, whether it met the needs of tourists regarding food and other items, and whether the pricing was reasonable.

Accommodation: This subscale consisted of 21 items regarding the appropriateness, atmosphere and quality of the accommodation. The items focused on the attractiveness of the accommodation, the pricing structure, servicing, expectations regarding luxury, and the variety on offer.

Reception: The reception subscale comprised 11 items aimed at measuring tourists' perceptions regarding convenience of access to the reception area, its attractiveness and atmosphere, the quality of the service rendered by reception staff and the business hours. The significance of the Reception areas of the

KNP camps is that it is the first and the last impression of the Park that tourists take home.

4.1.3.3.3 *RESPONSES*

Every item making up the various subscales consisted of a statement followed by a set of response options on a five-point scale. The participants were requested to complete all the items by marking the appropriate response options that suited their perceptions. The five-point scale was anchored at its extremes by 'Strongly disagree' and 'Strongly agree'. An example of an item is given below.

Example

1. The KNP should retain its identity by means of its emblem, decorations and staff uniforms



It was decided to use a five-point scale rather than a seven-point scale in the present study and also to use smiling/scowling faces to indicate degree of agreement to the item content. Several participants in the pilot studies complained that the questionnaire used was too long and a seven-point scale was rather clumsy. The present strategy was therefore followed to simplify the questionnaire and shorten the administration time.

4.1.3.3.4 *SCORING*

To cross-validate the results obtained during the pilot studies, exploratory factor analyses were once more carried out to ensure that the subscales were unidimensional. Every subscale resulted in a single factor being extracted. The internal consistency reliabilities of the subscales were then computed and yielded high Cronbach alpha coefficients ranging between 0,80 and 0,94. In Table 4.1 the means, standard deviations and reliability estimates of the various subscales for the total sample are provided. The psychometric properties of the questionnaire therefore appeared to be satisfactory and permitted the subsequent testing of the hypotheses.

It should be noted that total scores on every subscale were computed for every tourist. Subsequently the totals were divided by the number of items in the subscale in order to yield a subscale score per individual on a five-point scale. Individual total scores ranged between 1 and 5, with a score of 5 indicating the most positive perception possible and total agreement

with the items in the subscale. When means were calculated across a group of participants, the results were also expressed on a five-point scale. The data in Table 4.1 indicate that the perceptions of the participants were the most positive regarding reception ($M = 4,13$) and the least positive regarding the cafeteria ($M = 3,42$). On a scale ranging between 1 and 5, a mean of 3,42 is still above the mid-point of 3, thereby indicating a positive perception in general.

TABLE 4.1: Descriptive statistics and internal consistency reliabilities for the six subscales for the total sample

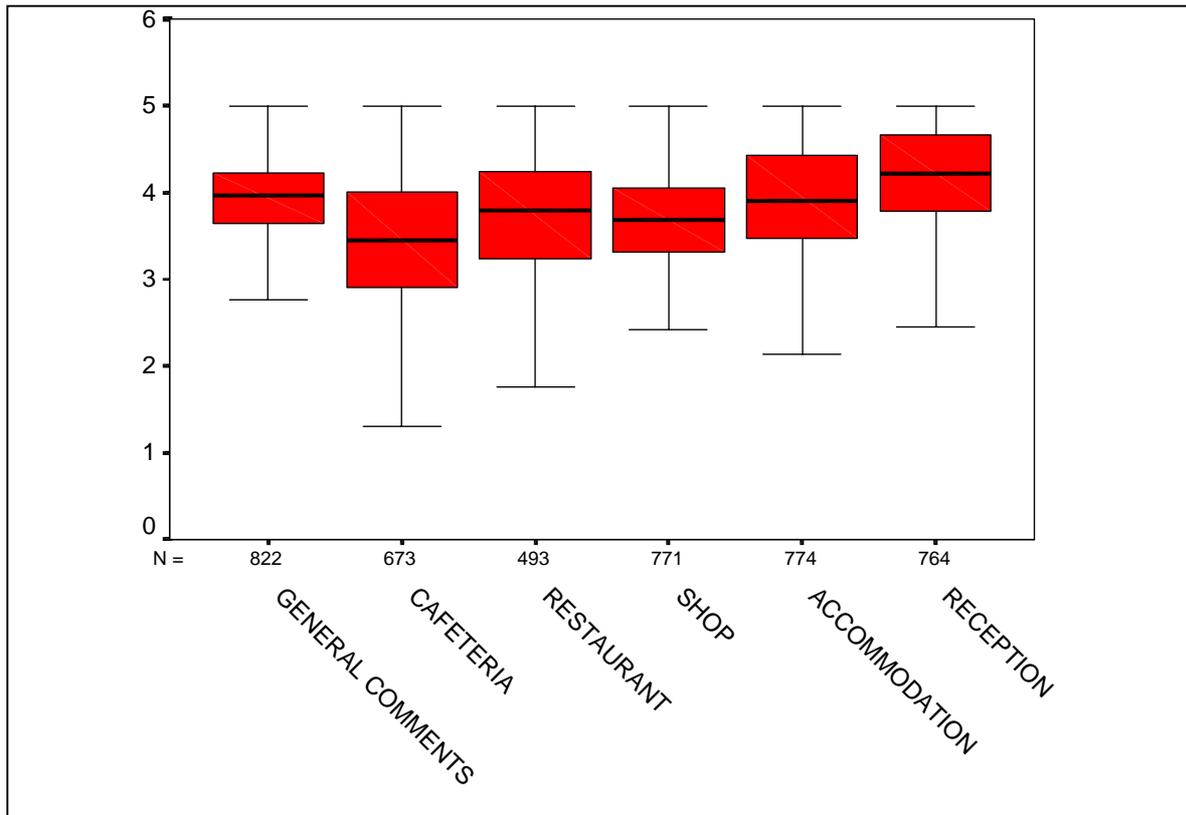
Subscale	<i>N</i>	Mean	Standard deviation	Minimum	Maximum	Cronbach alpha
Accommodation	774	3,87	0,71	1,00	5,00	0,93
Cafeteria	673	3,42	0,79	1,00	5,00	0,94
General	822	3,93	0,44	2,33	5,00	0,80
Reception	764	4,13	0,71	1,22	5,00	0,90
Restaurant	493	3,71	0,77	1,00	5,00	0,94
Shop	771	3,68	0,58	1,74	5,00	0,87

The box-and-whisker plots³⁶ of the data in Table 4.1 are presented in Figure 4.1. The heavy black line of each plot indicates the mean score, the box contains 25 % of the scores on each side of the mean (50 % in total) and the whiskers contain the remaining 25 % of the scores on either side of the box. Note that outliers (individual extreme scores) were omitted from the plots. Box-and-whisker plots were used because they give a much more comprehensive picture of the distribution of the scores than statistics such as the mean and standard deviation.

All the intercorrelations between the subscales were statistically significant at the 0,01 level of significance and varied between 0,32 and 0,65. The highest intercorrelation was obtained between the subscales Cafeteria and Restaurant, possibly because the item contents of the two scales were identical.

The reception and general atmosphere of the park were perceived positively by the sample. The fact that whiskers indicate both the lowest and highest scores given show that some of the respondents were unhappy with these highly rated variables. The food as represented by

³⁶ A box-and-whisker plot is a statistical technique of displaying data that emphasizes the dispersion of the dataset, rather than the frequency of individual values (Tredoux & Durrheim, 2002).

FIGURE 4.1: Distributions for the six subscales for the total sample

the cafeteria, restaurant and to a certain extent the shop merchandise were the most unsatisfactory variables. What makes it worse is that the KNP outsourced these services on 15 September 2001 to try and improve standards and service. Although the accommodation variable is average, there are concerns of low standards and unhygienic conditions. The qualitative remarks deal with these (see 4.1.5).

4.1.3.3.5 PROCESSING OF DATA

The Statistical Consultation Service of the Rand Afrikaans University carried out the data capturing and the statistical processing of the data. The statistical package for the Social Sciences (SPSS 11.0 for Windows) programme was used for the analyses of the quantitative data.

4.1.3.4 Missing data

Due to the length of the questionnaire and the fact that tourists had to complete it in their own time, some items were not answered. In these instances the non-responses were treated as missing data by omitting the particular records from the particular analysis being performed. This standard procedure resulted in varying sample sizes for the findings that were reported.

The large size of the sample permitted this procedure, because it would not influence the findings in any significant way.

Only in a few instances of special interest are the responses to individual items reported, because reporting on 120 items and testing hypotheses about every item would be a near impossible task. The strategy was rather to make comparisons regarding the respondents' overall perceptions of each of the six areas of operation represented by the six subscales, namely General, Cafeteria, Restaurant, Shop, Accommodation and Reception. Totals and means of respondents on the subscales were used for the hypothesis testing to indicate the overall perceptions of the participants regarding these areas. Stable and reliable results were obtained for the subscales as pointed out above, and as such this strategy appeared scientifically justifiable.

4.1.3.5 Hypothesis testing

In order to determine whether there were statistically significant differences between the perceptions of the tourists regarding the six subscales, paired sample *t* tests were carried out on the mean scores for the total sample using the Bonferroni adjustment³⁷ for multiple comparisons. There were statistically significant differences at the 0.01 level of significance between **every pair**, except between General and Accommodation, and between Restaurant and Shop. This implies, for instance, that the mean score for Reception was significantly higher than the means for any of the other subscales (see Table 4.1 and Figure 4.1). Similarly, the mean score for Cafeteria was significantly lower than the means for the remaining five subscales.

Subsequently, a series of hypothesis tests were performed to determine whether there were statistically significant differences between the groups as defined below, regarding the mean scores obtained on each of the subscales. For instance, a *t* test was performed to determine whether there were differences between the sexes regarding their perceptions of the General subscale. The next hypothesis test was performed to determine whether their perceptions differed regarding the Cafeteria subscale, and so forth for each of the subscales. One-way analyses of variance (ANOVA) was performed for these hypothesis tests and these were followed by Scheffé or Dunnett T3 post hoc tests, whichever was applicable. The test was carried out for the following groups:

³⁷ The Bonferroni adjustment is used to reduce the overall *Type I Error* rate in a set (family) of comparisons. It is a conservative test (Tredoux & Durrheim, 2002).

- Citizenship (citizen, resident, foreigner)
- KNP camps being reported on (including only camps involving samples larger than 28)^{*38}
- Festive season (22 December – 4 January) versus non-festive season*
- Category of tourist (day visitor, camper, resident)*
- Number of nights stayed at camp (one or two, three to five, more than five)
- Size of party*
- Number of visits to the KNP (one, two to four, five to ten, more than ten)*
- Age group
- Gender*
- Region of origin (omitting groups smaller than 30)
- Home language (Afrikaans, SA English, English foreign, Dutch, German, African, omitting small groups)*
- Marital status
- Educational level

To perform the first hypothesis test for the groups defined by citizenship, the sample was divided according to whether the participants were South African citizens, South African residents or foreign tourists. The sample sizes, means and standard deviations of the participants' scores on the six subscales for the three groups are provided in Table 4.2. The totals for the three groups combined are also presented in Table 4.1.

TABLE 4.2: Descriptive statistics for the six subscales for South African citizens, South African residents and foreign tourists

Subscale	SA citizens			SA residents			Foreign tourists		
	N	Mean	SD	N	Mean	SD	N	Mean	SD
Accommodation	440	3,88	0,72	52	3,81	0,77	274	3,87	0,69
Cafeteria	403	3,48	0,78	48	3,31	0,83	218	3,33	0,80
General	470	3,92	0,45	54	3,94	0,46	289	3,94	0,43
Reception	433	4,16	0,70	52	4,11	0,71	272	4,09	0,78
Restaurant	266	3,73	0,78	38	3,69	0,74	196	3,68	0,77
Shop	443	3,65	0,58	54	3,70	0,57	266	3,71	0,58

³⁸ * Denotes statistically significant differences

The results for the ANOVA that compared the means for the three groups on the General subscale (3,92 versus 3,94 versus 3,94) indicated that there were no statistically significant differences between these groups. There were also no statistically significant results when the groups were compared for the remaining five subscales. An interesting observation is that South African citizens rated the cafeteria higher than South African residents and foreigners, but these differences did not reach statistical significance. In the previous section it was indicated that the tourists' overall perception of the cafeteria was lower than that measured by the other subscales, and the lower ratings of the cafeteria by persons not of South African origin, may be worth considering.

4.1.4 Results

The participants were requested to respond to a variety of questions regarding biographical information and details regarding their visit to the KNP. The details are discussed in 4.1.4.1 to 4.1.3.2.11.

4.1.4.1 Camp

The participants had to indicate which camp they had in mind when they completed the questionnaire, because many were sampled during the day when they were visiting other camps than the one on which they wished to respond on. The frequencies of tourists who reported on the various camps are given in Table 4.3. The question of missing data was discussed in 4.1.3.4.

TABLE 4.3: Frequencies of tourists who reported on the various camps

CAMP	COUNT	%
Berg-en-Dal	78	9,70
Biyamiti	33	4,10
Day visitor	2	0,20
Crocodile camp	16	2,00
Letaba	48	5,90
Lower Sabie	63	7,80
Mopani	1	0,10
Olifants	246	30,40
Pretoriuskop	28	3,50
Punda Maria	18	2,20
Satara	165	20,40
Shingwedzi	4	0,50
Skukuza	106	13,10
Total (N)	808	100,00

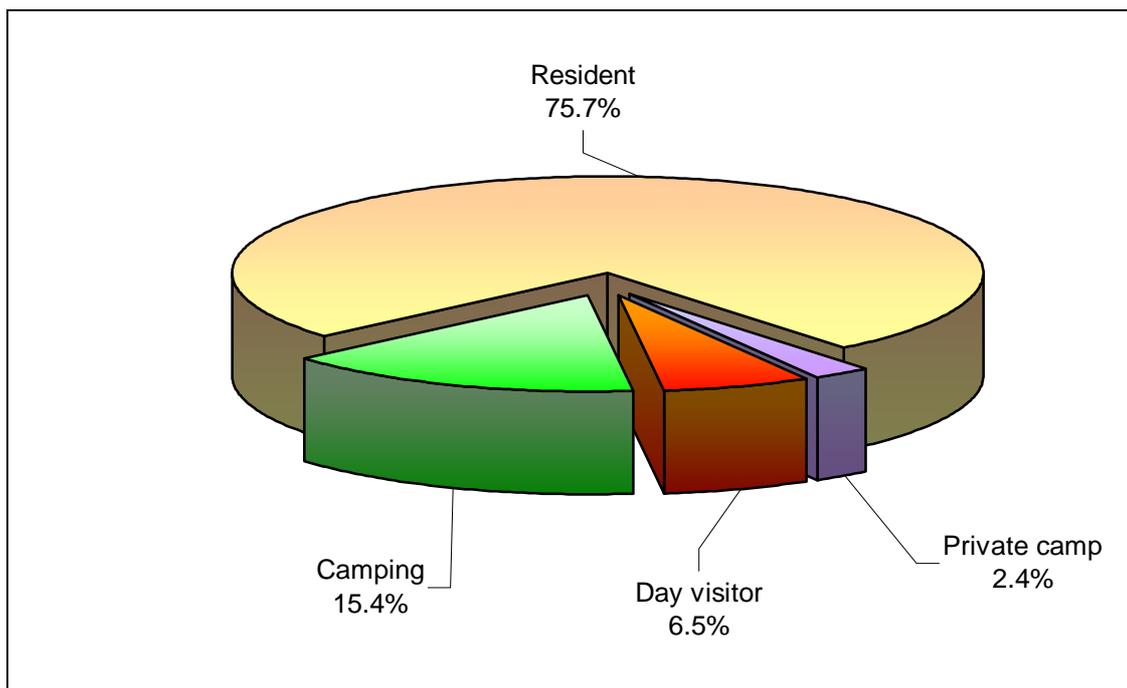
4.1.4.2 Category of tourist

A breakdown of the various categories of tourists who participated in the survey in terms of accommodation is provided in Table 4.4 and Figure 4.2. It indicates that the majority of the participants were occupants of huts/chalets (residents) in the various camps.

TABLE 4.4: Frequencies of the various categories of tourists

Category	Count	%
Camper	109	15,40
Day visitor	46	6,50
Private camp	17	2,40
Resident	538	75,80
Total (N)	710	10000

FIGURE 4.2: Categories of tourists

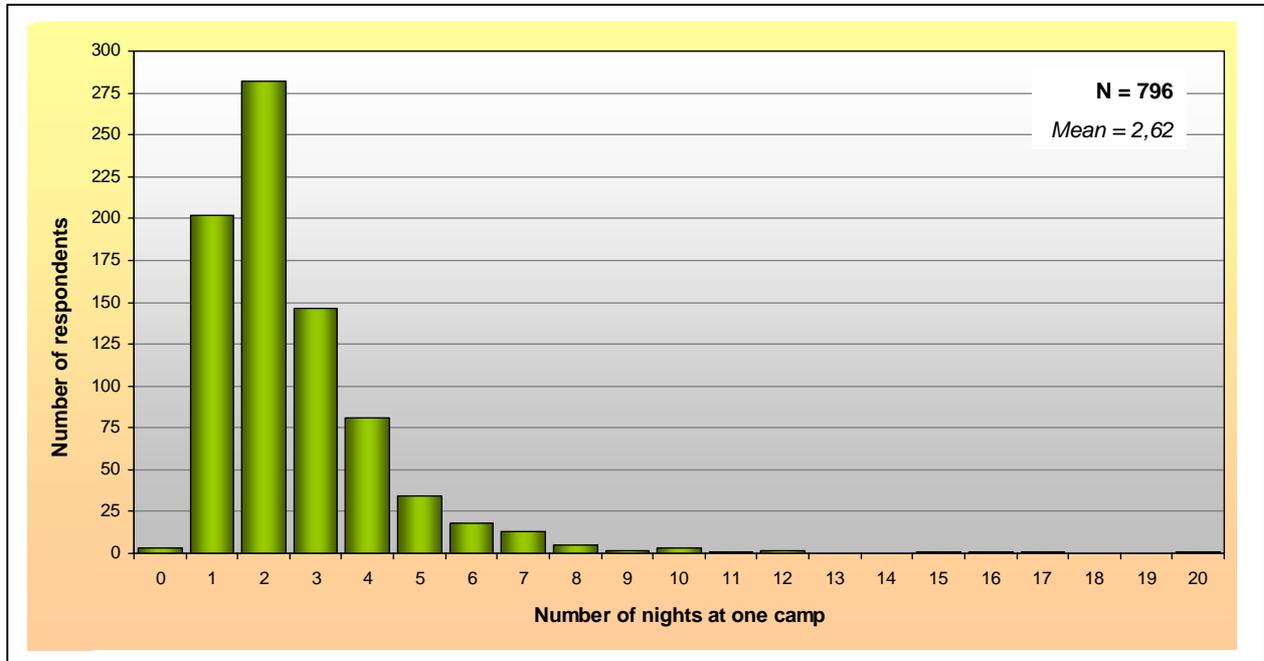


4.1.4.3 Number of nights stayed at the camp

The participants were requested to indicate how many nights they were staying at the camp on which they were reporting. The mean number of nights stayed at a camp was 2,62 and the

standard deviation (SD) was 1,93. The frequency distribution of the number of nights stayed at a camp is presented in Figure 4.3 with the number of tourists indicated on the vertical axis. The largest number of tourists stayed for two nights (N=282, 33,7 %) and the second largest number (N=202, 24,2 %) stayed for one night only.

FIGURE 4.3: Number of nights that tourists stayed at the camp



4.1.4.4 Number of nights stayed in KNP during present visit

The number of nights that the tourists were staying in the KNP during their present visit was recorded and the results are presented in Figure 4.4. The mean number of nights stayed was 5,48 (SD = 4,28). From the diagram it is clear that most respondents stayed for four nights (N=156, 18,7 %) or three (N=145, 17,3 %) only, but a substantial percentage of the tourists stayed for five nights or longer (45,4 %).

4.1.4.5 Size of touring party

The participants indicated the number of people in their party and the results are presented in Figure 4.5. It appears that the most common party consisted of two persons (N=350, 41,9 %), followed by parties consisting of four persons (N=173, 20,7 %). Eighty percent of parties were made up of four people or less.

FIGURE 4.4: Number of nights that tourists stayed in the KNP during their visit

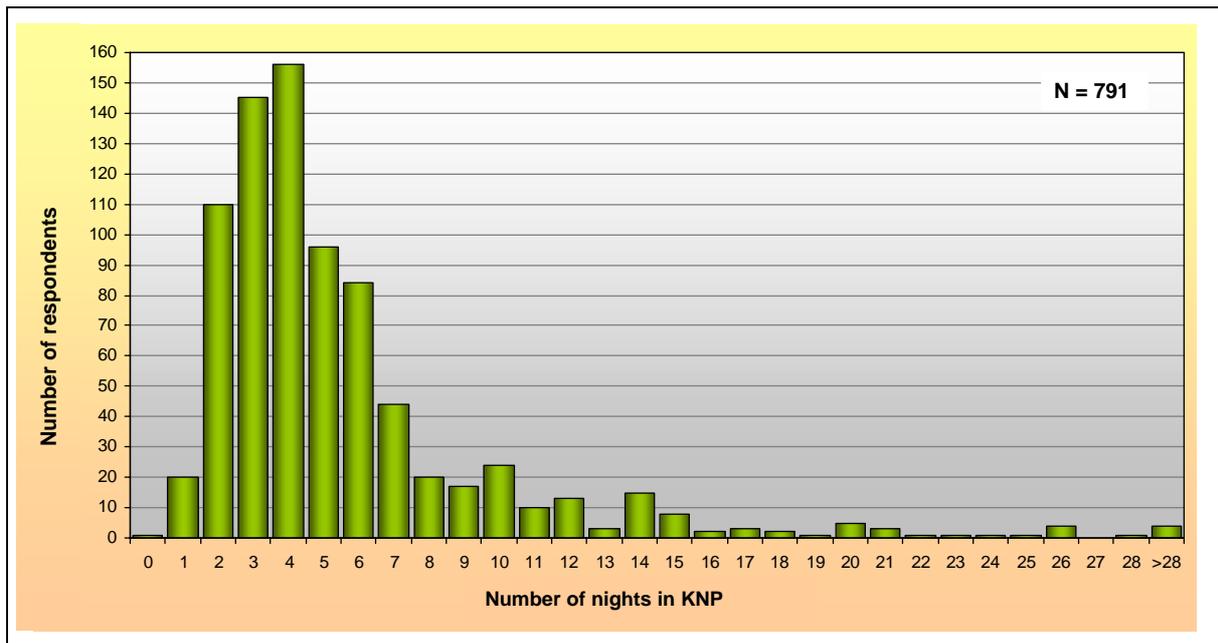
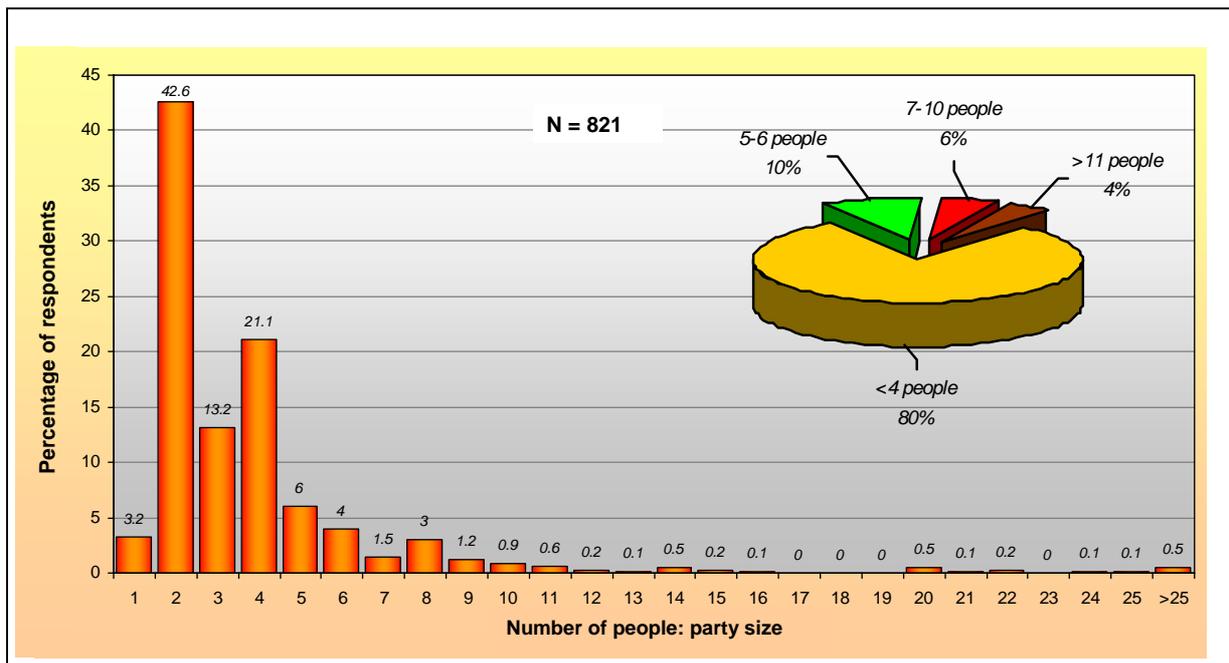


FIGURE 4.5: Size of party visiting the KNP



4.1.4.6 Frequency of visits to the KNP

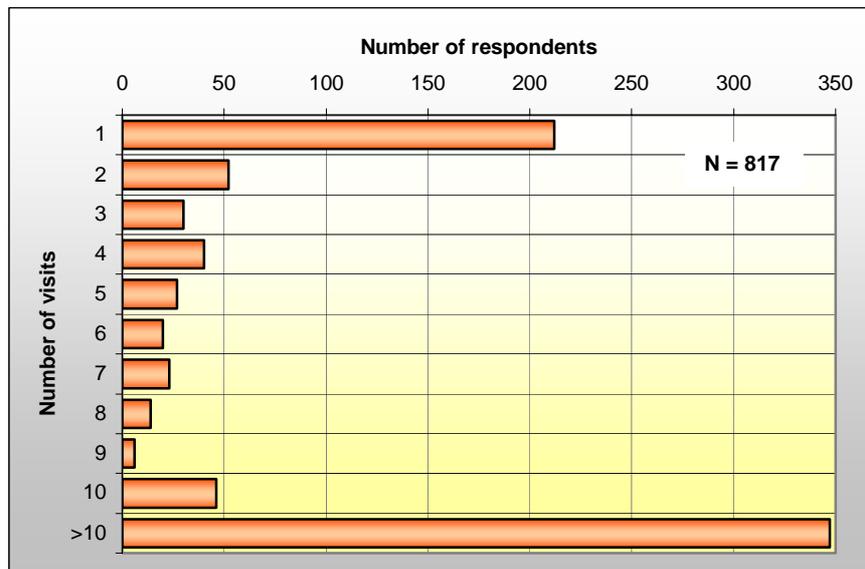
The tourists indicated how many times they have visited the KNP, including their present visit. The results are given in Table 4.5 and Figure 4.6. The most notable findings are that the KNP is frequented by a substantial percentage of first-time tourists (N=212, 25,9 %), and, most importantly, that a very large proportion of the tourists had visited the park more than 10 times

(N=347, 42,5 %). Further investigation revealed that, when considering South African citizens only, the proportion of first-time tourists were negligible compared with the number of participants who have visited the park more than ten times (see Figure 4.7).

TABLE 4.5: Number of visits to the KNP

Number of visits	Count	%
1	212	25,90
2	52	6,40
3	30	3,70
4	40	4,90
5	27	3,30
6	20	2,40
7	23	2,80
8	14	1,70
9	6	0,70
10	46	5,60
More than 10	347	42,50
Total (N)	817	100,00

FIGURE 4.6: Number of visits to the KNP



4.1.4.7 Age and gender of the participants

The participants indicated their ages and gender and these results are presented in Tables 4.6 and 4.7. In comparison with the results of the pilot study conducted during a low-season period, the present sample consisted of relatively young tourists, with 79,2 % of them under the age of 55 years. Approximately equal numbers of males (51,60 %) and females (48,40 %) completed the questionnaires.

FIGURE 4.7: Number of visits to the KNP (South African citizens only)

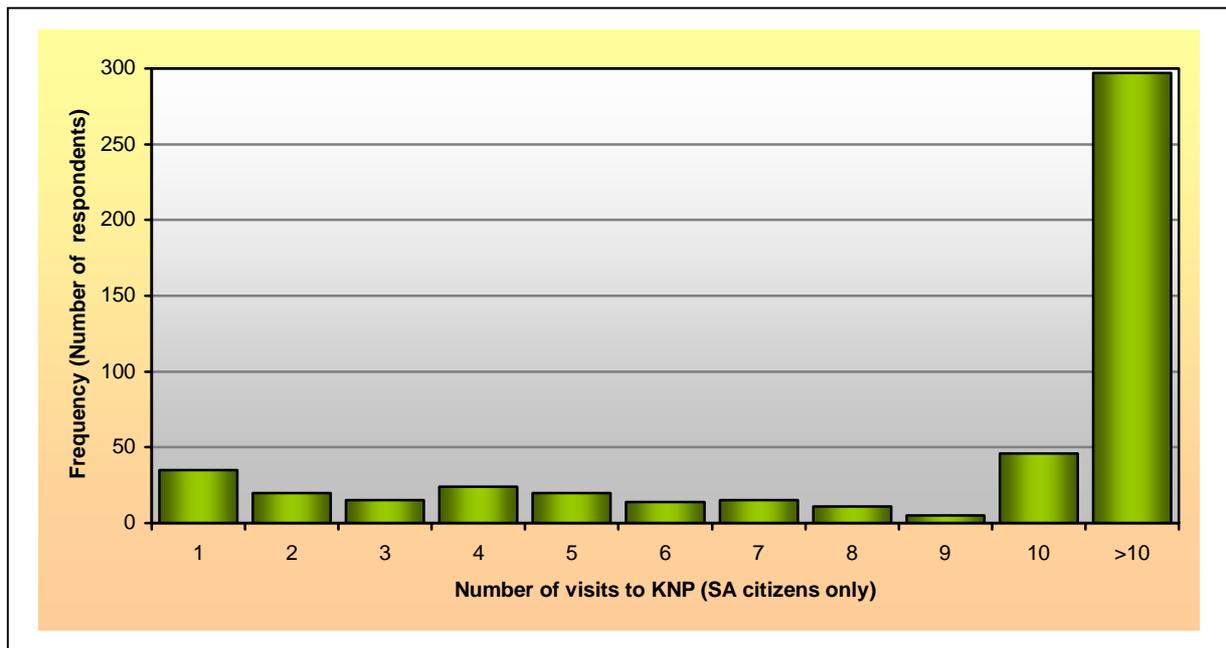


TABLE 4.6: Age distribution of the participants

Age Groups	Count	%
<19	29	3,50
20 – 29	126	15,30
30 – 39	233	28,30
40 – 54	264	32,10
55 – 64	131	15,90
65 >	40	4,90
Total (N)	823	100,00

TABLE 4.7: Gender distribution of the participants

Gender	Count	%
Female	392	48,40
Male	418	51,60
Total (N)	810	100,00

4.1.4.8 Marital status

The tourists were requested to indicate whether they were married/living with a partner, single or divorced/widowed. The results presented in Table 4.8 indicate that the majority of the tourists sampled are married/living with a partner (78,10 %).

TABLE 4.8: Marital status of the participants

Marital status	Count	%
Married/Living with a partner	641	78,10
Single	137	16,70
Divorced/Widowed	43	5,20
Total (N)	821	100,00

4.1.4.9 Highest educational qualification

From Table 4.9 below it seems that the majority of the tourists to the KNP are highly educated if the present sample may be regarded as representative of the population of KNP tourists. No less than 49,90 % of the participants indicated that they had completed a tertiary qualification lasting four or more study years. Altogether 79,50 % had completed a tertiary diploma or three year degree.

TABLE 4.9: Highest educational qualifications of the participants

Qualifications	Count	%
0-11 years education	17	2,10
12 years	151	18,40
Tertiary: 1-3 years	243	29,60
Tertiary: 4+ years	409	49,90
Total (N)	820	100,00

4.1.4.10 Origin of the participants

The details regarding the origin of the participants are given in Table 4.10. Although the majority of the respondents were South African citizens (57,60 %), a substantial proportion consisted of foreign tourists (35,70 %). This result was expected, because the study was conducted during the festive months over the winter season in the northern hemisphere.

TABLE 4.10: Origin of the participants

Origin	Count	%
South African Citizen	472	57,60
South African Resident	55	6,70
Foreign Tourist	292	35,70
Total (N)	819	100,00

4.1.4.11 Origin and home language of the participants

The region and specific country of origin of the participants are presented in Tables 4.11 and 4.12. Only 640 of the tourists completed this question. A large percentage of missing values may imply that the percentages provided in the tables are biased and need to be interpreted with caution. In comparison with the 57,60 % participants who indicated that they were South African citizens (Table 4.8), only 42,97 % indicated that South Africa was their country of origin (Table 4.9). The tourists originated from a large number of countries across the globe, but the majority of the foreigners came from Europe and the United Kingdom. The diversity of the KNP tourists was also apparent from the variety of home languages that they indicated, as reported in Table 4.13.

TABLE 4.11: Region of origin of the participants

Country/Region	Count	Percentage
South Africa	275	42,97
Europe	177	27,66
United Kingdom	105	16,41
USA and Canada	30	4,69
Rest of Africa	22	3,44
Australia & New Zealand	14	2,19
Scandinavia	12	1,88
Middle East & Asia	5	0,78
Total (N)	640	100,00

TABLE 4.12: Specific country of origin of the participants

Country	Count	Country (<i>continued</i>)	Count
AUSTRALIA	10	MALAWI	2
AUSTRIA	2	MALAYSIA	2
BELGIUM	11	MOZAMBIQUE	2
BOTSWANA	1	NAMIBIA	1
BRAZZAVILLE CONGO	1	NEW ZEALAND	4
BRITAIN	87	NORWAY	1
BURUNDI	1	PORTUGAL	3
CANADA	6	SAUDI ARABIA	1
COLOMBIA	1	SCOTLAND	5
DENMARK	3	SOUTH AFRICA	275
DUBAI	1	SWEDEN	7
FINLAND	1	SWITZERLAND	13
FRANCE	12	TANZANIA	1
GERMANY	88	THE NETHERLANDS	43
IRELAND	10	UNITED STATES OF AMERICA	24
ITALY	5	WALES	2
JERSEY CHANNEL ISLANDS	1	ZAMBIA	2
KOREA	1	ZIMBABWE	11
LESOTHO	1		

4.1.4.12 Significant results

As a result of the large number of hypothesis tests that were performed (see 4.1.3.5), only comparisons that yielded statistically significant results will be summarized. Asterisks [*] next to the defined groups above indicate that some statistically significant differences were obtained for these groups.

TABLE 4.13: Home languages of the participants

Language	Count	Language (<i>continued</i>)	Count
AFRIKAANS	191	NORTH SOTHO	1
ARABIC	1	NORWEGIAN	1
DANISH	3	PORTUGUESE	2
DUTCH	46	SETSWANA	2
ENG & AFR	12	SHANGAAN	14
ENGLISH	383	SISWATI	2
FLEMISH	2	SPANISH	1
FRENCH	16	SWEDISH	6
GERMAN	103	SWISS	2
ITALIAN	7	TSHIVENDA	3
KOREAN	1	TURKISH	1
MALAY	2		

Statistically significant differences were obtained for the following comparisons:

- the participants rated the restaurant in Skukuza higher than the restaurant at Olifants Camp;
- the accommodation at Biyamiti was rated more positively than that at Skukuza, Lower Sabie and Pretoriuskop;
- reception at Olifants was rated higher than at Letaba, Satara and Skukuza;
- reception at Berg-en-Dal was rated higher than at Letaba, Satara and Skukuza;
- reception at Biyamiti was rated higher than at Olifants, Letaba, Satara, Skukuza and Lower Sabie;
- accommodation was rated higher by the festive-season group than by the non-festive season group;
- campers were more positive about the cafeteria than chalet residents;
- smaller groups were more positive about the accommodation than large groups;
- tourists who had visited the KNP between one and four times were more positive regarding the General subscale than tourists who had been to the Park more than ten times;

- tourists who had been to the park two to four times rated the shop higher than those who had been to the Park more than ten times;
- tourists who had been to the Park five to ten times rated the reception higher than those who had been to the Park more than ten times;
- females were more positive than males regarding the General subscale; and
- tourists with an African home language rated the cafeteria higher than English-speaking foreigners or Germans.

4.1.4.13 Responses to individual items

The responses to only three individual items out of the 120 items were studied separately, because the contents of these items were regarded as particularly important in view of the information that they would potentially yield. The responses to these three items are presented in Table 4.14.

The results in Table 4.14 are also presented graphically in the form of graphs in Figures 4.8 to 4.10.

There is a clear degree of uncertainty when looking at the percentages of the three questions in Table 4.14. Uncertainty could mean difference of opinion, which the KNP should take seriously for such an important management intervention.

TABLE 4.14: Significant scores obtained for three individual items regarding the KNP's identity and the issue of commercialization

Questions		1 Strongly disagree	2 Disagree	3 Neutral	4 Agree	5 Strongly agree	Total (N)
The KNP should retain its identity by means of its emblem, decorations and staff uniforms	Count	5	5	42	172	582	806
	%	0,6%	0,6%	5,2%	21,3%	72,2%	100,0%
Commercialization has a positive effect from the tourists' point of view	Count	97	103	223	233	126	782
	%	12,4%	13,2%	28,5%	29,8%	16,1%	100,0%
Visible commercialization is destroying the "Kruger experience"	Count	107	178	201	149	149	784
	%	13,6%	22,7%	25,6%	19,0%	19,0%	100,0%

FIGURE 4.8: Responses of the total sample to “*the KNP should retain its identity by means of its emblem, decorations and staff uniforms*”

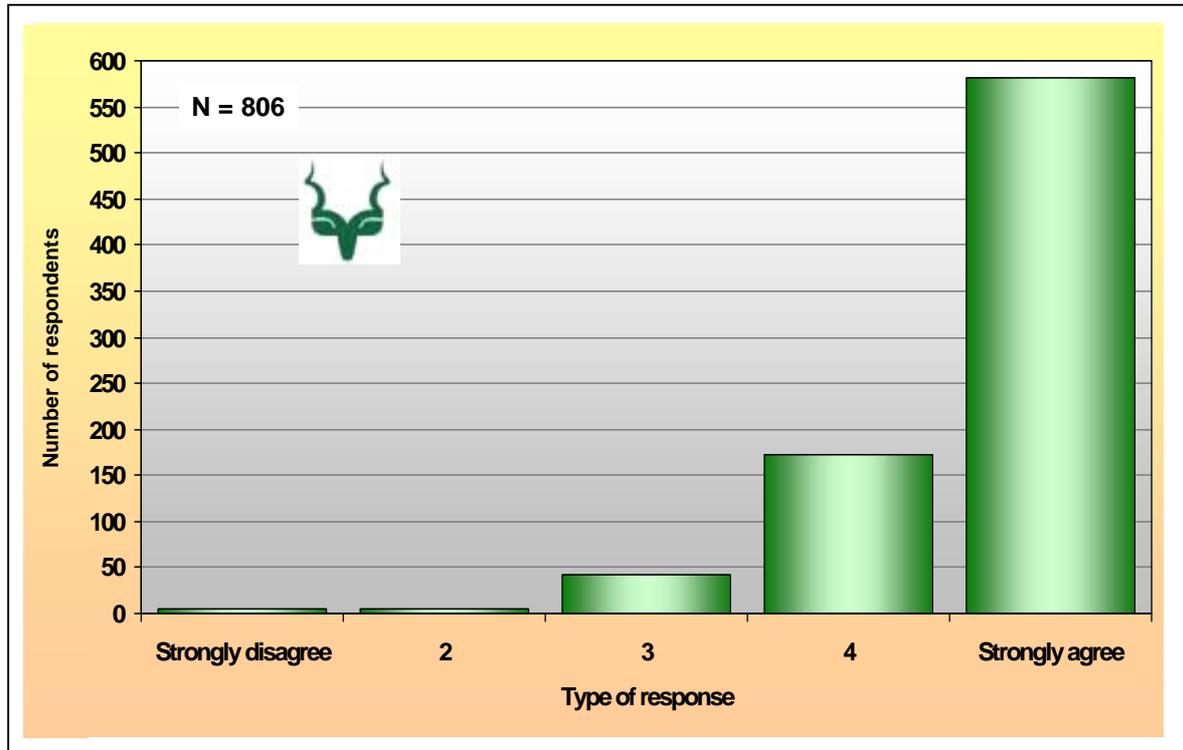


FIGURE 4.9: Responses of the total sample to “*commercialization has a positive effect from the tourists' point of view*”

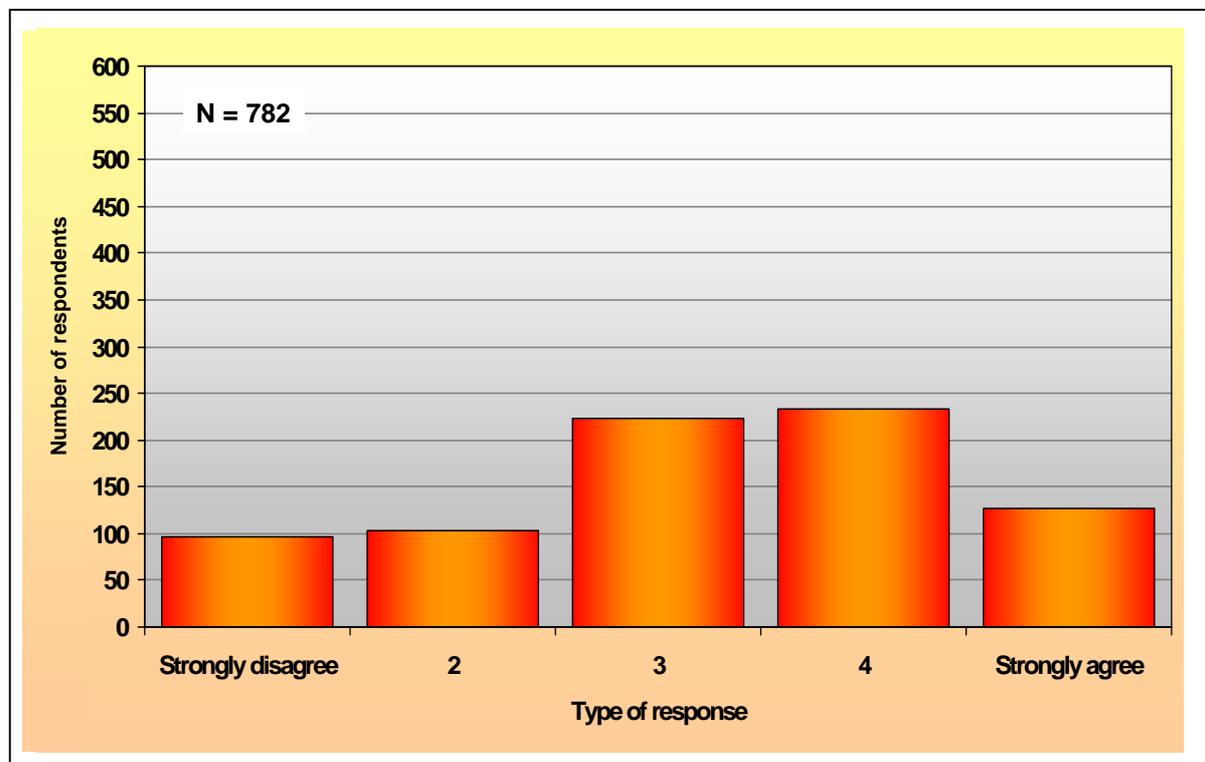
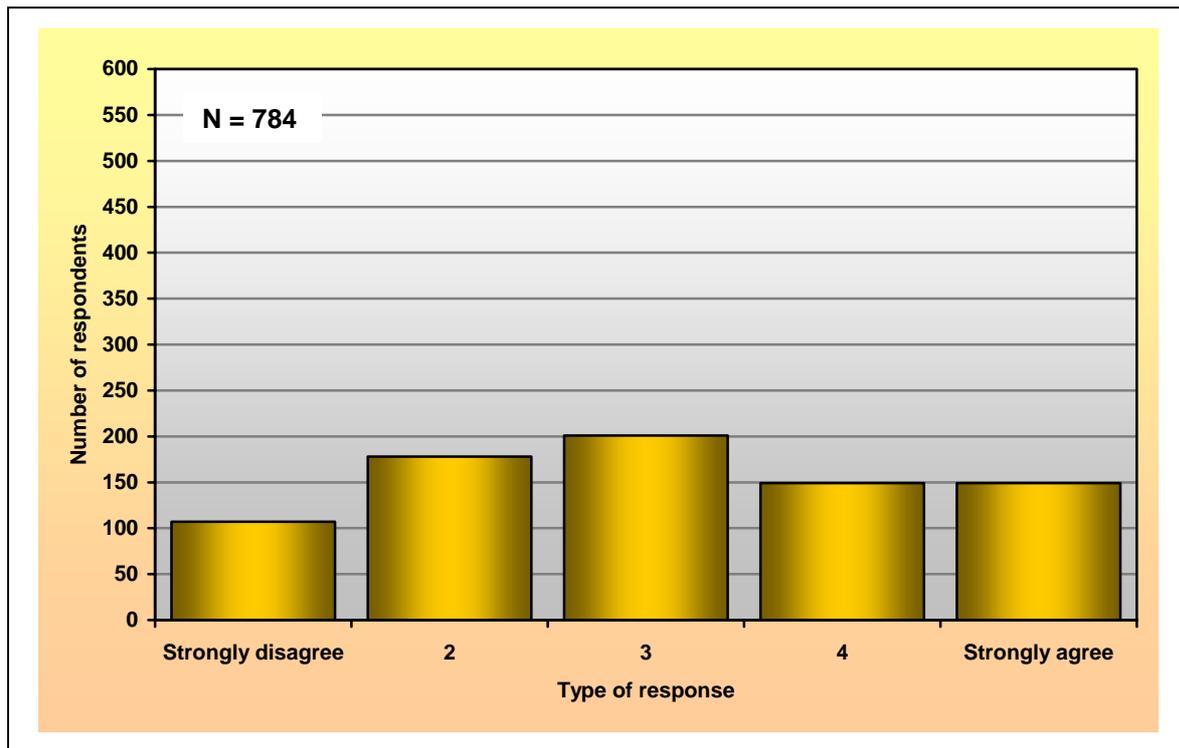


FIGURE 4.10: Responses of the total sample to “*visible commercialization is destroying the Kruger experience*”

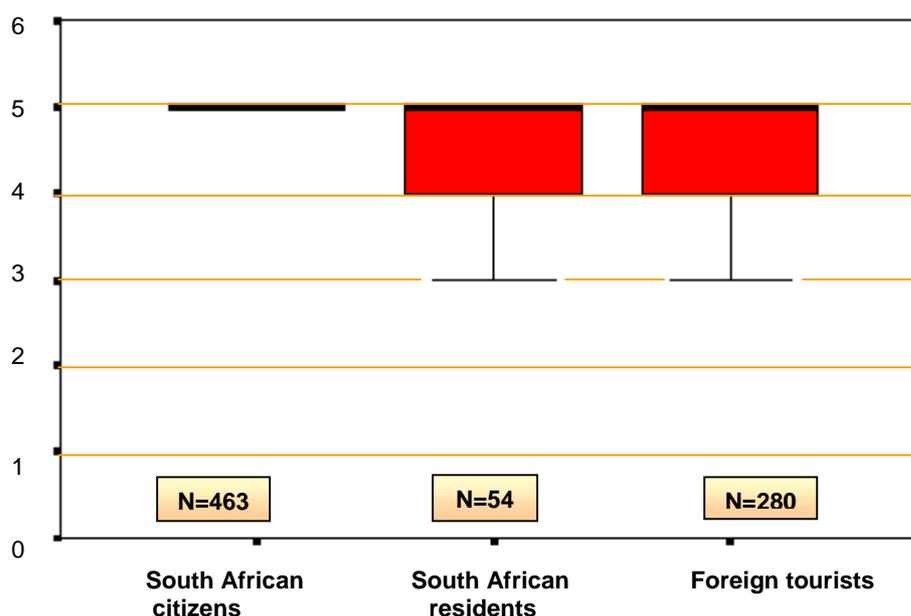


From the results given in Table 4.14 and Figures 4.9 and 4.10, it is clear that tourists feel very strongly that the identity of the KNP should be retained. In fact, 93,5 % of the participants agreed or strongly agreed with the statement. This sentiment was particularly strong among South African citizens when the box-and-whisker plots for the South African citizens, South African residents and foreign tourists are studied as reflected in Table 4.14 and Figure 4.11.

In contrast with the item regarding the identity of the KNP, the two items on commercialization of the KNP yielded mixed responses, which indicated that tourists were not in agreement about the effects of commercialization. If responses on the midpoint of the response scale are disregarded, substantial proportions of the sample disagreed (25,60 %) and agreed (45,90 %) that commercialization has a positive effect from the tourists' point of view. Almost equal percentages of participants disagreed (36,30 %) and agreed (3,00 %) that visible commercialization is destroying the "Kruger experience". With the exception of some specific items regarding the cafeteria and the restaurant, the tourists indicated positive perceptions to all the items in the questionnaire as is evident from the distributions of the individual items (see Annexure 7) and also in the high mean scores obtained on the subscales that were well above the midpoint of three in every case. In contrast, their mixed reactions regarding commercialization serve as a pointer that this could be a problem area. It was at this point that the researcher's decision to measure the effect of commercialization gained relevance.

Box-and-whisker plots of the responses of South African citizens, South African residents and foreign tourists to the item “the KNP should retain its identity by means of its emblem, decorations and staff uniforms” were computed and are presented in Figure 4.11. It is seen that there is no variation in the responses of the South African citizens and that they simply chose “strongly agree” as their answer. In contrast, the responses of South African residents and foreign tourists showed some variation, but they were still strongly in favour of the KNP identity being preserved as seen by the high mean scores.

FIGURE 4.11: Responses of South African citizens, South African residents and foreign tourists to “the KNP should retain its identity by means of its emblem, decorations and staff uniforms”



The distributions of the responses to the individual items in the questionnaire are given in Appendix 7. It should be noted that five tourists to Biyamiti indicated that they were reporting on the cafeteria at the camp, two Biyamiti tourists reported on its restaurant and one reported on its shop. These are clearly errors caused by participants not considering their responses carefully because Biyamiti offers no such facilities. The advantage of using a large sample lies in the fact that errors such as these do not influence the overall results in the final analysis and interpretation of the findings.

4.1.5 Results for the qualitative data

With regard to the qualitative section of the survey, responses were typed and grouped according to topic area. In the next phase, themes were identified under each topic area.

Thereafter data was again ordered³⁹ and built up into sub-themes. It should be kept in mind that qualitative data provides a deeper understanding and does not attempt to generalize. It is more subjective and provides the viewpoint of the respondent. Attempts were made to cover the richness of information received in such a way that no important themes or identified topics were omitted.

A summary of the most frequent comments follows in 4.1.5.1 to 4.1.5.10. (The original typescript of remarks covered 29 pages.) Some of the qualitative comments were not included as subscales in the questionnaire but added by the respondents.

4.1.5.1 *Breaking of rules and regulations*

There seems to be a general disregard of rules by tourists manifested by incidents of drunken driving, getting out of cars where it is not allowed, exceeding the speed limit, littering, feeding of animals and high levels of noise in the rest camps. Respondents ascribe these problems to a lack of effective policing by the Park's rangers.

4.1.5.2 *Maintenance of infrastructure*

Respondents mainly cited general poor conditions of the roads, with some roads becoming narrower because of bush encroachment. Night-drive vehicles running out of fuel resulting in tourists stuck to up to two hours in the bush waiting anxiously for evacuation. Few amenities such as ablution blocks resulting in facilities being unable to cope with large crowds during peak holiday periods, thus creating dirty and unhygienic conditions in public toilets. There is a general pest-control problem with bats and cockroaches harassing tourists in their huts.

4.1.5.3 *Safari vehicle operators' behaviour*

The safari vehicle operators show very little or no regard for tourists other than their own passengers. They drive fast in search of the "Big Five" to satisfy their own clients' needs and block other tourists from enjoying the same sights and often spoil the viewing experience of other tourists. Their customary "double parking" habit at sightings result in traffic congestion and mayhem.

³⁹ Arranging ordinal variables to indicate categories that are both different from each other, and ranked or ordered in terms of an attribute (Tredoux & Durrheim).

4.1.5.4 *Check-ins at entrance gates and receptions*

The guards at the main entrance gates are aggressive, rude and make tourists feel unwelcome. Some reception staff did not greet guests on arrival and projected an attitude of “doing guests a favour” by booking them in. These staff members seem to be insufficiently trained as they struggle to check-in guests and are often unable to resolve booking-related problems. It has been noted that some staff members are unfriendly and satisfied to be “just doing their jobs”. There seems to be a problem with the reservations system because camps are said to be fully booked while guests find ample accommodation available on their arrival in the Park.

4.1.5.5 *Suggestions to improve service and product range*

Every camp should have a swimming pool. More information material on different Park activities such as safari tours, walks and drives should be made available at information centres. More appropriate look-out parking spaces should be built with a northern elevation to facilitate photography. More automatic teller machines (ATMs) should be installed.

4.1.5.6 *Cafeterias*

The quality of food in the cafeteria is deplorable. There is too much junk food resembling American fast-food products. Prices of meals are extremely high. The food presentation is poor and unattractive. There is little or no variety to cater for clients with dieting preferences, e.g. fresh salads, vegetables and health breads. Tourists had to compete with “bees and wasps” attracted by sticky table surfaces. There is no attractive interior décor and everything seems to be old. The cafeteria needs good cleaning and scrubbing. Service is generally slow and food was cold when eventually delivered to the table. Staff is unable to cope with large orders and lack professionalism and efficiency.

4.1.5.7 *Restaurants*

Meals are not well prepared, are over-cooked and over-priced (Breakfast at R70 and dinner at R100). There is a general lack of variety to meet dietary preferences and health-related eating options. Restaurants need thorough scrubbing and cleaning. Tourists would appreciate more South African cuisine as opposed to Euro-American dishes. The lighting and interior décor are inappropriate and ruined the atmosphere. Waiters lack training, are unfriendly and dishonest. Some waiters simply pocketed clients’ change and assumed it to be their tip without the

client's consent. Generally service is poor, menus are unattractive and patrons receive no value for their money.

4.1.5.8 *Shops*

The shops are overcrowded for the amount of stock they carry and this affects the “shopping experience” in the KNP. Business hours are not convenient as shops are closed when tourists leave for a morning drive or return from an evening game drive. Like the restaurants, prices are ridiculously high. There is a problem with obtaining fresh vegetables and fruit. The wine selection is very poor compared to South Africa's world-renowned fine wine selections. Items with expired use-by dates remain on the shelves with the possibility of exposing tourists to food poisoning. There is a limited variety, e.g. the shops stock meat only but not fish. Service is poor as demonstrated by long queues at the tills. Some staff members are unfriendly and not always in uniform. The shops do not stock items such as mosquito nets and other essentials that are needed for survival in the bush. There is in general no customer-care service in the shops.

4.1.5.9 *Accommodation*

Accommodation does not provide value for money and is overpriced, considering that far superior accommodation is available outside the park at similar prices if not lower. The Park's accommodation system does not offer affordable accommodation for single travellers – tourists pay a full price for 2-3 sleeper units. There is an argument for price differentiation for local and foreigners although this is not a simplistic matter given the emotions that surround it. Housekeeping does not appear to be jerked up, given the horde of maintenance-related complaints such as bat and mice problems, blown light bulbs, broken washing machines, blocked shower drains, chipped glasses, insufficient cutlery, fewer dishes, lack of cleanliness, beds not made up, floors not swept under the beds and many other complaints. Blankets, sheets and towels should be improved with a bias for comfort. Most guests would prefer to have a choice between a double and single bed rather than be forced to sleep in single beds. Check-out time should be adjusted to 10h00 to accommodate guests returning from early morning game drives. Rooms should be lockable to give guests a sense of security, given the crime levels in South Africa.

4.1.5.10 *Camping*

More electrical points are required at the camping sites. The camping area should be made more attractive through landscaping and extension of ablution facilities. Camping areas need

more and better dustbins, water taps, low-impact lights and more braai facilities. More trees and lawns should be planted to enhance the bush experience. Degradation at campsites has reached eye-sore levels.

4.1.6 Discussion and interpretation

4.1.6.1 Accommodation

This survey revealed that the KNP has a universal appeal to tourists drawing tourists from all over the world beyond its known traditional domestic and European markets. The majority of tourists travels in pairs or family groups, on average stay for two nights and prefers to use chalets or huts. This is all the more reason why the interior décor, including the size of beds and linen, should be adjusted to host two people or more comfortably. The KNP should benchmark itself to world known national parks like Yellowstone (USA), Banff (Canada), Great Barrier Reef (Australia) and many others around the world in terms of the service and accommodation. Accommodation facilities and service levels in the cited national parks are comparable to those offered by hotel establishments.

The majority of tourists, 69,1 %, are happy with the luxury level of accommodation and do not want more luxury options than that provided. However, the maintenance of accommodation was one of the concerns of the respondents. The camp facilities are aging and deteriorating. This has a negative impact on the total experience of the tourists. There are concerns regarding comfort levels and the size of beds, quality of linen and blankets. There are problems concerning adequate supply of utensils and cleaning material to units by housekeeping staff which also adds to the discomfort of the tourist. The issue of bats, cockroaches and mice warrants the institution of an effective pest-control programme without risking poisoning of the whole environment.

4.1.6.2 Information centres

There are many first-time tourists to the KNP (25,9 %) who do not know what to expect on arrival, unlike the traditional repeat tourists who can find their way around the park independently. There are not enough information facilities to meet the needs of first-time tourists because the product is geared in the main for the domestic self-catering budget travellers. There is an urgent need to put in place information desks or centres where tourists can obtain information guides, maps and other material to help them enjoy their stay in the Park. There are no information officers or customer service staff to help tourists to get around.

4.1.6.3 Needs of younger tourists

The age profile of the KNP's tourists seems to have changed over the years. The majority of tourists captured in this sample showed a younger age group of between 20 and 54 years constituting 75,70 % of the tourists. In the past few years the bulk of tourists were estimated at age 55 and older. It is imperative for management to plan and provide tourism products and experiences that will meet the expectations of this younger group as well. In the qualitative remarks respondents indicated a desire for, among others, late-night bars, Internet café, televisions, cell phone coverage at camps, swimming pools at all camps, shadow netting at parking lots and other modern amenities. The provisioning of such amenities would bring the Park in line with what major modern destinations offer to the modern traveller. However, it is imperative for management to ensure that such requests for sophisticated amenities are in line with the image and character of the KNP's wilderness qualities which emerged in the Value-laddering survey (see 4.3.7) as a unique selling point. Feasibility studies should be conducted to maintain the essential qualities of the destination.

4.1.6.4 Language issues

In the qualitative results a few domestic respondents complained about what they perceived to be marginalization of the Afrikaans language in the Park. According to this sample only 23,50 % of tourists in the sample are Afrikaans speaking. The spectrum of tourists sampled in the study speak many different languages and it would be difficult for the Park to cater for all these languages in its documents and business transactions. The majority in this sample understands English and it therefore makes economic sense to use English as a business language of the Park. This move is in accordance with the Park's global status as a holiday destination. In a complex new socio-political environment in South Africa where more than 11 official languages are spoken it would be difficult to satisfy the language preferences of all tourists. However, nothing precludes management from employing receptionists that can speak as many South African languages as is possible. It can only give people a sense of belonging.

4.1.6.5 Overall impressions

Many issues that warrant attention arose from the respondents' general comments. Among these is the availability of sufficient law-enforcement officers (rangers) to ensure that the rules and regulations of the Park are enforced. Members of staff dealing with tourist management in general appear to be inadequately trained for their jobs. The gate attendants, night-drive guides, receptionists, housekeeping staff, waiters and law-enforcement officers appear to be

suffering from training gaps in their overall preparedness for their jobs. Customer relations do not exist and tourists perceive staff to be unfriendly.

Although the overall perceptions of the respondents recorded a mean of 3,42 (from Table 4.2 on the six subscales, thus denoting a positive perception across all the areas of the KNP product and services, there was a substantial number of scores below the mean (1-2) in the whisker part of the box-plots. This dynamic indicates the existence of levels of dissatisfaction with some aspects of service delivery and the products on offer. The concerns are captured in the distribution of responses to the 120 individual items in the questionnaire (Annexure 7). It is extremely concerning that 37,2 % of tourists who went on night drives felt that the experience was not value for money. Night drives are handled by student interns and it could be that the level of interpretation that the student interns offer is of poor quality. There is also a notable concern that 43,7 % of the sample felt that there are too many official vehicles racing to and fro in the park, thus disturbing viewing. About 45,3 % of the sample felt that the Park was overcrowded with people, thus spoiling the experience.

4.1.6.6 *KNP identity*

The KNP is a strong brand known for its identity and culture. The respondents unanimously agreed that the 'identity' of the KNP is the strongest aspect to preserve. The brand of the KNP should be promoted and not hidden in the maze of other national parks because it has a universal appeal. Tourists have a huge and an unprecedented emotional, spiritual and inspirational attachment with the KNP brand.

4.1.6.7 *Restaurants and cafeterias*

The restaurants box and whisker plot in Figure 4.1 reflects this subscale as a second area of most concern after the cafeteria. The qualitative comment made in 4.1.5. reflects on the specific activities that tourists are not happy with. There are serious problems with menus, presentation, offering variety on meals, interior décor, cleanliness, service and ridiculously high prices. When asked about self-catering ingredients 79,8 % of the sample indicated that they prefer to bring their own equipment and cater for themselves because of the poor quality of the food variety in the Park. After all self-catering is allowed and facilities have been provided by the Park. It would appear that the current contractor has no system and standards or benchmarks of service-delivery in place. Food constitutes an important component of the total KNP experience and if the restaurants continue on this mode it is unlikely that such a trend would not impact negatively on the image and service of the Park as a whole. The

contractor should be bound by a performance contract with achievable targets to improve service.

4.1.6.8 *Effects of commercialization*

A substantial number of respondents negatively experienced the effects of commercialization and this finding justifies a further investigation of the implementation of commercialization as a conservation strategy. There are untested feelings among tourists that it destroys the natural qualities of the Park and that items that are sold by the retail outlets are highly commercialized rather than being natural and traditional. From the mixed feelings it would appear that, whilst no-one disputes the need for achieving financial viability through commercialization, there exist genuine concerns with regard to the method of its implementation.

The issue of commercialization is being taken further in the next survey to test the concept with another sample. Overall results from the tourist survey (see 4.1) is that an average number of guests are satisfied with the KNP product although it needs improvements in the subscales that scored lower than the General and Reception subscales.

4.1.6.9 *Management of tourism facilities*

The management of rest camp accommodation constitutes more than 80 % of the tourism functions in the KNP and equally generates a similar percentage amount in revenue earnings. If this component were to be optimally and efficiently managed, more than two thirds of the KNP's tourism related problems would be resolved. It is due to this reality that SANParks is looking for innovative ways to optimally manage its tourism facilities. One of the options that management once mooted and is a likely possibility in the not-too-distant future is the outsourcing of rest camp accommodation facilities or its management. Facilities constitute one of the tourism and recreational values that must be managed efficiently and effectively to keep the KNP attractive to potential tourists.

4.2 SURVEY ON OUTSOURCING OF REST CAMP ACCOMMODATION

4.2.1 Rationale for the survey

It was mentioned in 3.12 that SANParks might in future consider commercialization of the rest camps of the KNP as part of its tourism transformation process and conservation management strategy. This survey aims to reflect a selected convenience sample of tourists'

opinions in this regard. The main reason for this survey was to investigate the possibility of outsourcing rest camp accommodation, which would allow KNP staff to focus on biodiversity conservation management rather than on organizing and managing accommodation and related services. The investigation explored outsourcing of accommodation facilities to private companies on a concession basis, which is the latest international trend in conservation areas.

The survey was also meant to determine tourists' opinions about outsourcing, and find out whether they would still support the Park if prices were to increase. The survey aimed at determining if the public would find it acceptable or appropriate to outsource the park's rest camp accommodation to private operators. Tourists' opinions were sought to determine if their frequency of visits would increase or decrease if the KNP would decide to outsource its accommodation facilities. They were asked to bear in mind the possibility of improved service for which they would have to pay market-related prices. The survey also explored tourists' opinions regarding different rates for foreigners and South Africans, and regarding the extent of the difference between prices. In addition, tourists were asked to rate their overall satisfaction with the accommodation facilities as they currently stand. Suggestions offered by the respondents regarding possible accommodation improvements were also explored.

4.2.2 Objectives

Briefly the objectives of the survey were to:

- determine whether South African and foreign tourists to the KNP would support outsourcing of accommodation to private operators or not;
- determine what the effect of price increases due to outsourcing would be on the frequency of future visits;
- determine the level of satisfaction of tourists with the present accommodation; and
- determine whether South African and foreign tourists are in favour of or against different accommodation rates for South Africans and foreigners and what type of price differentiation would be seen as acceptable.

Information generated by this survey will also be applied in the formulation of the proposed pricing policy at SANParks.

4.2.3 Research method

4.2.3.1 Method of data collection

The method of data collection was in the form of a single page questionnaire (see Annexure 8). The questionnaire was administered in English only, so that foreigners who could not understand English were not included in the sample (and was treated as missing data).

The researcher, assisted by five research assistants (Master degree students from Unisa: Department of Psychology), administered the questionnaire verbally. This was during the South African school holiday period covering the week of 26 to 28 March 2003. Some respondents filled in the questionnaire themselves. Respondents were informed about the motivations for the research and the importance of their opinions was stressed. Respondents were also assured of anonymity and confidentiality.

4.2.3.2 Sample

The convenience sample consisted of 317 tourists to the KNP on the 26th, 27th and 28th March 2003. After a brief pilot study the researchers found that the best areas to find respondents were the restaurant/ shop/ picnic areas during breakfast and lunch hours. People leaving and arriving at these areas were asked to complete the questionnaire. Participation was voluntary. Most people were friendly and willing to participate. Only one out of every twenty people refused and this was usually a foreigner who could not speak English. Participating tourists were from Berg-en-Dal, Skukuza, Lower Sabie, Pretoriuskop and Satara. People at the picnic spots Afsaal and Tshokwane were also sampled.

The details of the sample can be seen in Tables 4.15 to 4.18 and Figures 4.12 to 4.15.

4.2.3.3 Method of data analysis

Each questionnaire was given a number (001-317) and the items of the questionnaire were coded (see Annexure 9). The item 'Camp' complicated issues as many respondents had stayed at more than one camp. If less than three camps were given only the first camp was coded. If three or more camps were given, a code for 'three or more camps' was allocated. For items 3 and 4 in the questionnaire, many people responded with 'not sure' thus an additional option of 'not sure' was included and coded.

Once all the raw data had been coded, the analyses were done. The data obtained were nominal and ordinal, thus only descriptive analyses of an exploratory nature were done.

Numbers and percentages were calculated, tabulated and graphed (see 4.2.4 for more detail).

Mean rates of satisfaction were calculated for the sample of respondents that stayed overnight in the park. The frequency and percentage of responses for each satisfaction level were calculated for the South African, foreign and mixed samples. These results are presented in Tables 4.15 to 4.25 and Figures 4.12 to 4.22.

To determine whether the majority of the respondents were in favour of or against outsourcing, the frequency and percentage of responses falling into the For / Unsure / Against outsourcing categories were calculated for all three groups. These results were tabulated and graphed. The reasons given by respondents for their opinions about outsourcing were examined and discussed.

To determine whether price increases would affect the respondents' frequency of visits to the KNP, total scores and percentages were calculated for the whole sample. These results were tabulated and graphed. Qualitative remarks given regarding this item were discussed.

Similarly, to determine overall opinions about whether foreigners should be charged more for accommodation than South Africans, results were calculated for the whole sample and for the South African and foreign samples separately. Percentages of responses falling into the Yes/ Unsure / No categories were calculated for all three groups. Graphs were also drawn indicating these percentages (see 4.2.5.5). In addition, the responses from the portion of the total sample who were in favour of charging more for foreigners were further examined. The percentage of responses from this group that wanted to charge 50 % more/ double the price/ three times the price/ more than three times the price/ other, respectively, were calculated.

Finally, the qualitative responses given to item 5 of the questionnaire were examined and responses relevant to outsourcing of accommodation are discussed.

4.2.4 Results

4.2.4.1 *Region of origin*

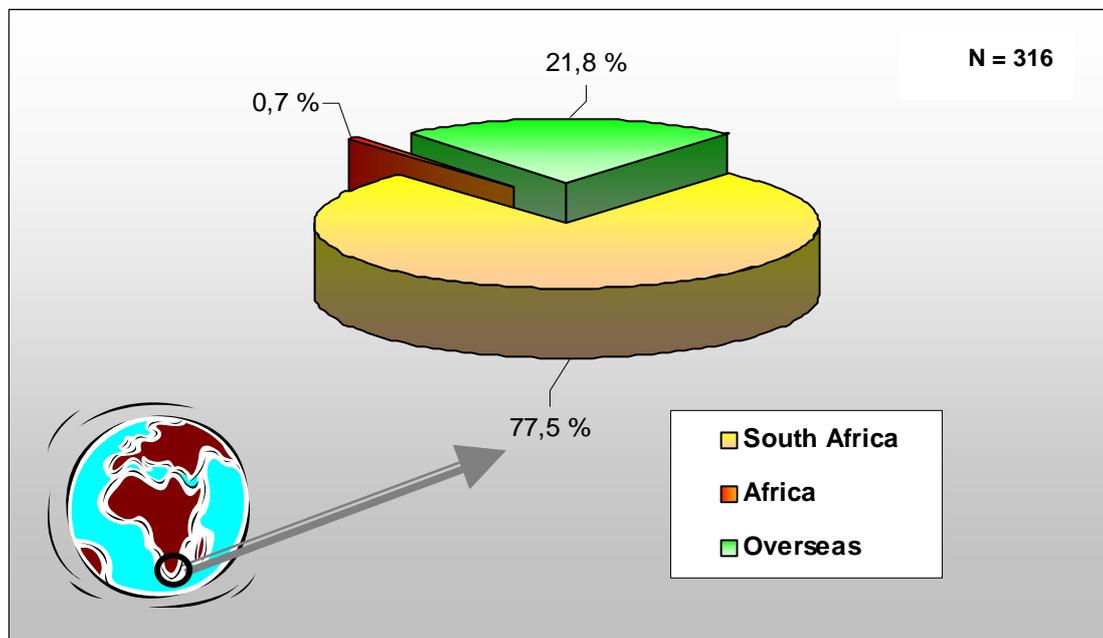
Table 4.15 and Figure 4.12 give details of the origin of the respondents. It is worthwhile to note that the questionnaire asked about 'country of origin' as opposed to 'country of

residence', and some of the respondents who form part of the foreigners category are in fact living in South Africa. Two hundred and forty five (245) respondents were South African, 2 from elsewhere in Africa and 69 from overseas. One respondent did not indicate where he/she was from and was thus excluded from the data on country of origin (treated as missing data). The two Africans were for all further data analysis included in the overseas category, in a category 'Foreigners'.

TABLE 4.15: Respondents according to origin

Country	Count	Percentage
South Africa	245	77,5
Overseas	69	21,8
Africa	2	0,7
Total (N)	316	100,0

FIGURE 4.12: Region of origin, as percentage of the total sample



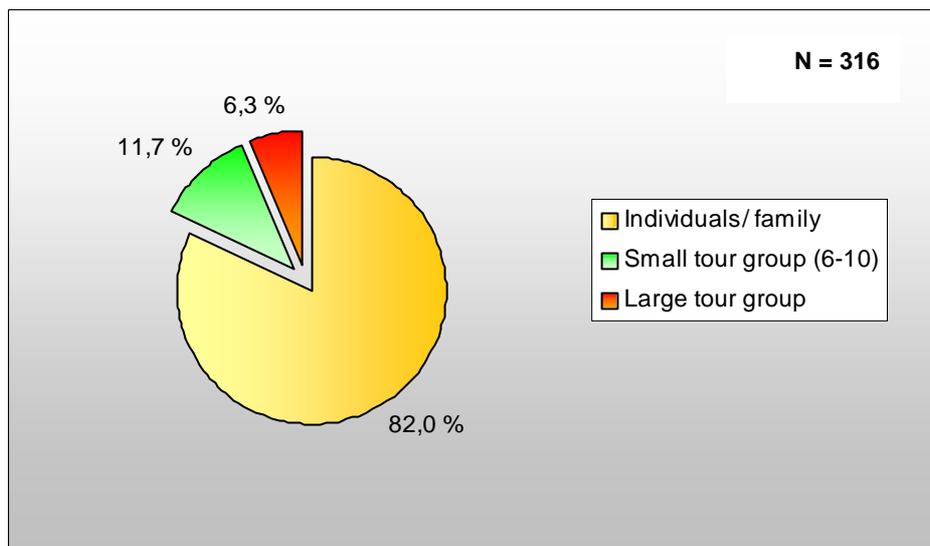
4.2.4.2 Size of touring party

Table 4.16 and Figure 4.13 show the size of the touring party that the respondents were a part of. One respondent did not indicate the size of the touring party that he/she was a part of and was thus excluded from Table 4.16 and Figure 4.13.

TABLE 4.16: Party size of the respondents

Touring party	Count	Percentage
Individuals or family group	259	82,0
Small tour group (6-10)	37	11,7
Large tour group	20	6,3
Total	316	100,0

FIGURE 4.13: Party size of the respondents, as percentage of the total sample



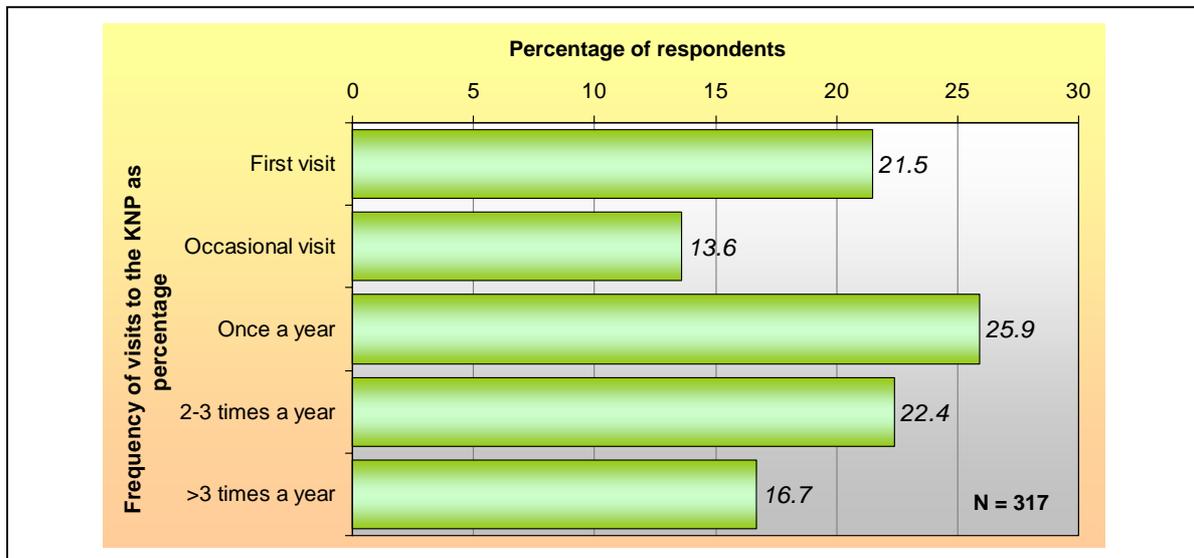
4.2.4.3 Frequency of visits

Table 4.17 and Figure 4.14 below show how often respondents visit the KNP.

TABLE 4.17: Frequency of visits to the KNP

Frequency of visits	Count	Percentage
Once a year	82	25,9
Two or three times a year	71	22,4
First visit	68	21,5
More than three times a year	53	16,7
Occasional visit (less than once a year)	43	13,6
Total (N)	317	100,0

FIGURE 4.14: Frequency of visits to the KNP, as percentage of the total sample



4.2.4.4 Camps

Table 4.18 and Figure 4.15 show the number of respondents staying at the respective camps.

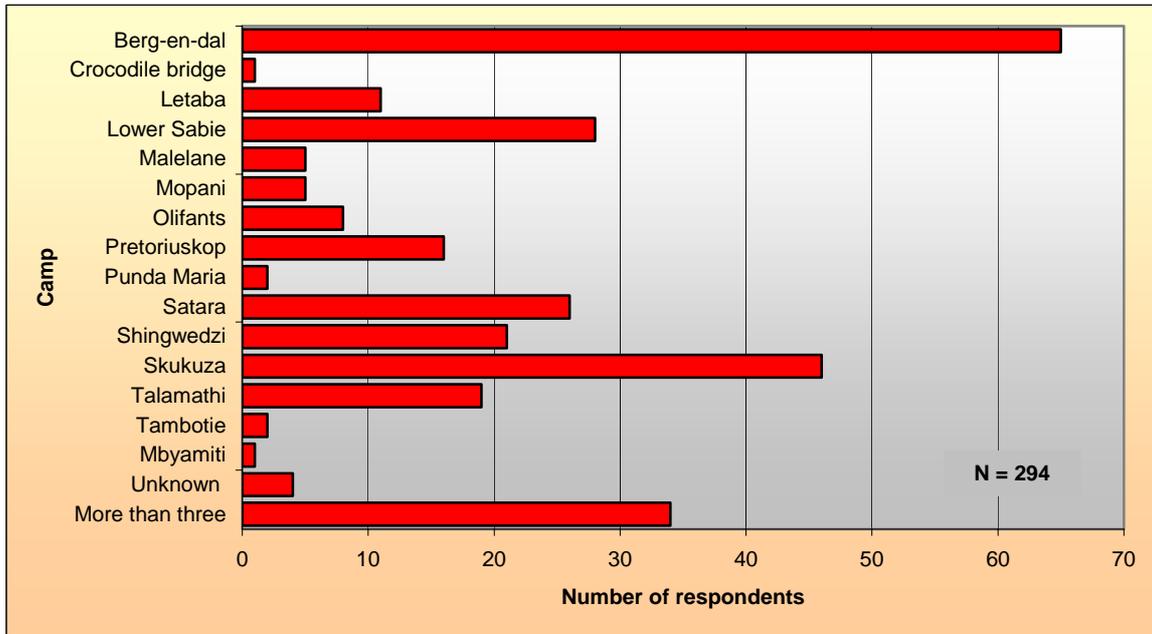
TABLE 4.18: Number of respondents staying in each of the camps

Camp	Count	Ranking
Berg-en-Dal	65	1
Biyamiti	1	14
Crocodile Bridge	1	14
Letaba	11	9
Lower Sabie	28	4
Malelane	5	10
Mopani	5	10
More than three camps	34	3
Olifants	8	11
Pretoriuskop	16	8
Punda Maria	2	13
Satara	26	5
Shingwedzi	21	6
Skukuza	46	2
Talamathi	19	7
Tambotie	2	13
Unknown	4	12
Total (N)	294	

Twenty three (23) of the respondents were day visitors and thus were not part of the sample staying in the camps. Four of the respondents who were staying overnight in a camp did not know the name of the camp where they were staying. This was because they were foreigners

and part of a tour group. In all, result 290 participants named the camps where they were staying. It is important to note that many of the respondents had stayed in more than one camp but to simplify the data analysis only the first camp mentioned was recorded. If they had been staying in one or more than three camps it was classified as such.

FIGURE 4.15: Number of respondents staying at each camp



4.2.5 Accommodation satisfaction

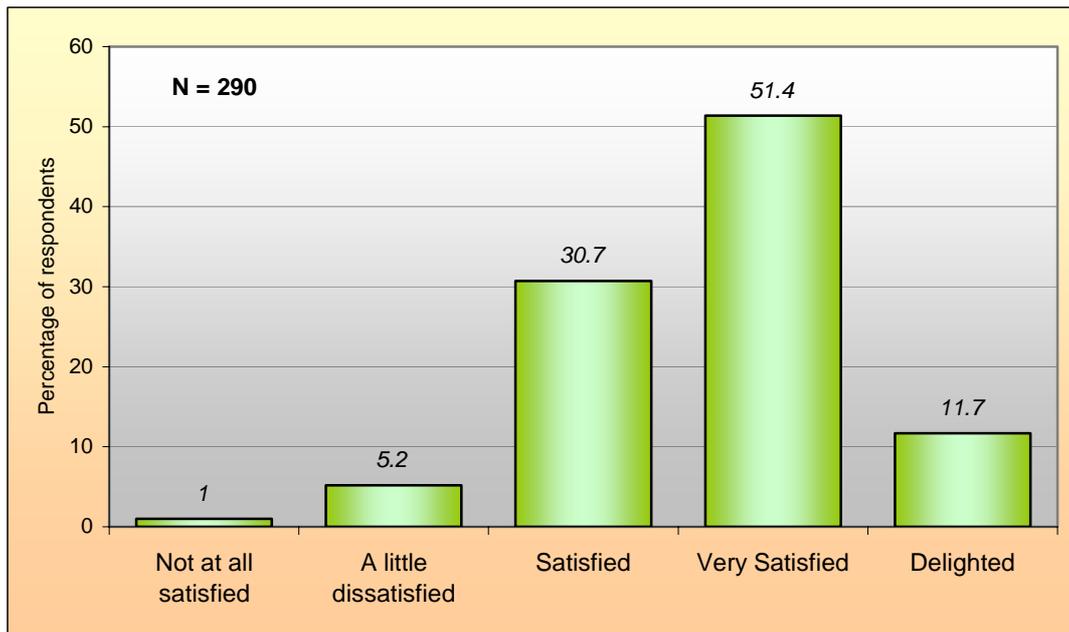
4.2.5.1 Overall satisfaction

As mentioned earlier, 294 respondents stayed overnight in the Park. Four of them did not rate their level of satisfaction with accommodation. Thus the responses of the remaining 290 were tabulated. The most frequent response was 'Very satisfied' which implies that the majority of the sample were very satisfied with accommodation. See Table 4.19 and Figure 4.16 below for the frequencies.

TABLE 4.19: Responses regarding overall satisfaction with accommodation (different levels of satisfaction)

Level of satisfaction	Frequency	Percentage
Not at all satisfied	3	1,0
A little dissatisfied	15	5,2
Satisfied	89	30,7
Very satisfied	149	51,4
Delighted	34	11,7
Total (N)	290	100

FIGURE 4.16: Percentage of responses regarding overall satisfaction with accommodation (different levels of satisfaction)



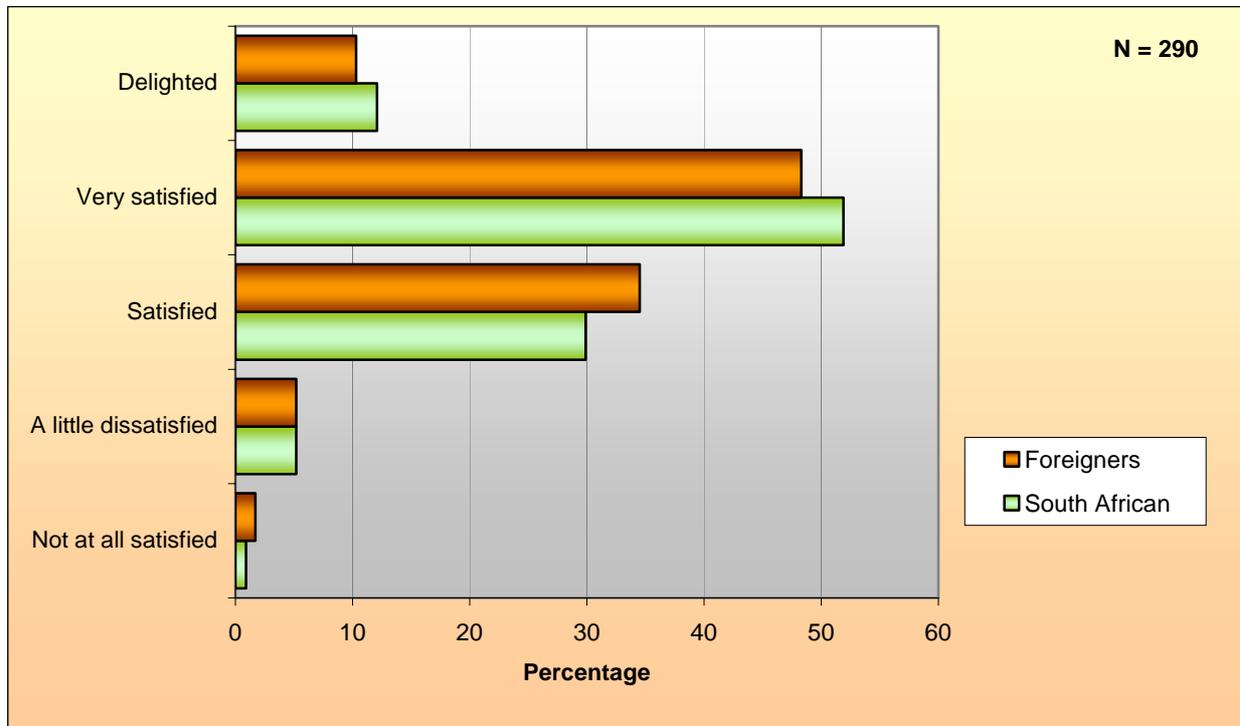
4.2.5.2 Satisfaction of South African and foreign respondents

Out of the sample of 290 respondents that rated the accommodation, 231 were South Africans and 58 were foreigners. One respondent's country of origin was not indicated and the response was thus excluded from the analysis. The results can be seen in Table 4.20 and Figure 4.17. The most frequent response for both samples was 'Very satisfied'. Only 6,1 % of the South Africans and 6,9 % of the foreigners were either 'Not at all satisfied' or 'A little dissatisfied'.

TABLE 4.20: Responses for the South African and foreign samples regarding the different levels of satisfaction with accommodation

Level of satisfaction	South African Count	South African Percentage	Foreigners Count	Foreigners Percentage
Not at all satisfied	2	0,9 %	1	1,7 %
A little dissatisfied	12	5,2 %	3	5,2 %
Satisfied	69	29,9 %	20	34,5 %
Very satisfied	120	51,9 %	28	48,3 %
Delighted	28	12,1 %	6	10,3 %
Total (N)	231	100 %	58	100 %

FIGURE 4.17: Percentage of responses of South Africans and foreigners regarding accommodation (different levels of satisfaction)



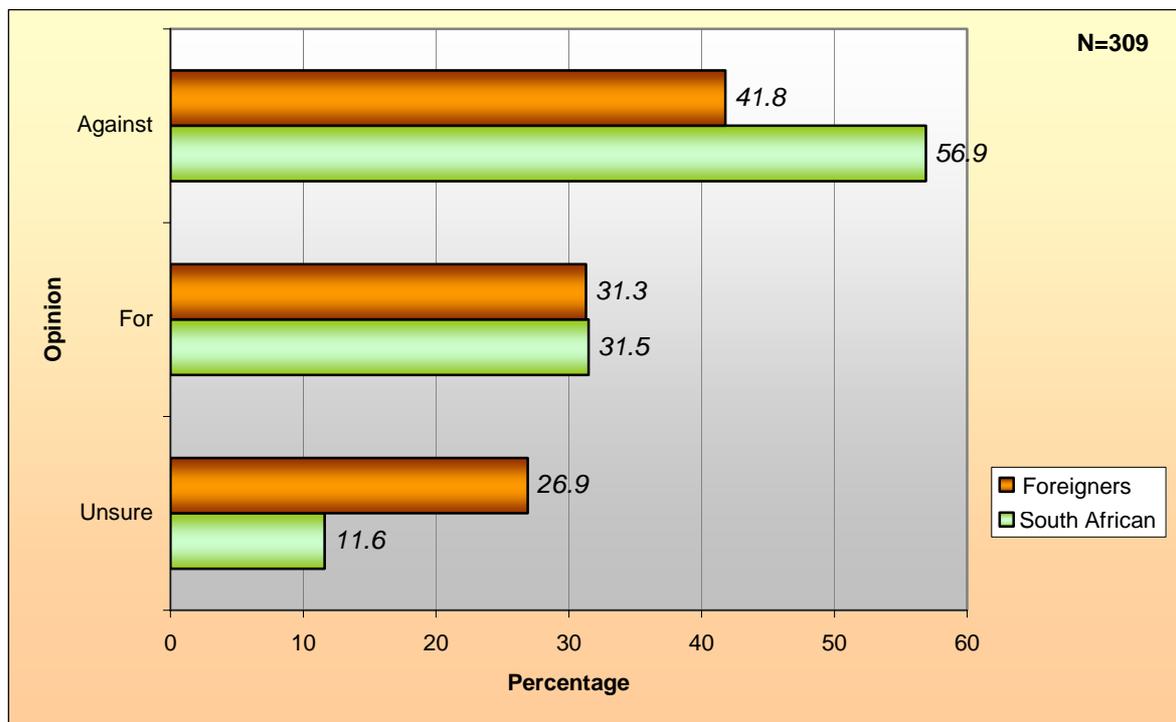
4.2.5.3 Outsourcing of accommodation

Opinions about accommodation outsourcing were explored for the total sample as well as for the South African and foreign samples, separately. In all three groups, the largest percentage of the samples was found to be opposed to the outsourcing of accommodation to private operators. Eight (8) respondents did not answer the question. Four (4) of these were South African and four (4) were foreigners. They were thus excluded from the results. The one respondent who did not indicate his/her country of origin was included in the results for the total sample but not in the other two samples. The details regarding the opinions are shown in Table 4.21 and Figure 4.18.

TABLE 4.21: Responses regarding the outsourcing of accommodation

Opinion on outsourcing	South African Count	South African Percentage	Foreign Count	Foreigners Percentage	Total Count	Total Percentage
Unsure	28	11,6 %	18	26,9 %	46	14,9 %
For	76	31,5 %	21	31,3 %	97	31,4 %
Against	137	56,9 %	29	41,8 %	166	53,7 %
Total (N)	241	100,0 %	68	100,0 %	309	100,0 %

FIGURE 4.18: Percentage of responses of South Africans and foreigners regarding the outsourcing of accommodation



Respondents who were opposed to outsourcing gave a number of different reasons for their opinions. These are listed below:

- the money paid for accommodation must be used for conservation and not for private operators;
- the Park must conserve its culture and must not become commercialized;
- outsourcing will result in an increase in prices, making the Park inaccessible for South Africans. It will no longer be a 'national' park;
- tourists come to the Park for peace and tranquility and to see the animals, not for five star accommodation;
- accommodation can be upgraded without outsourcing. Better supervision and management are needed;
- the restaurants and shops are worse now since they have been outsourced. Restaurants are too expensive, commercialized and service and quality have deteriorated. The same might happen to accommodation;
- the present staff's jobs could be threatened and the local community will not benefit;

- pensioners are already struggling to afford the Park. What will happen if prices were increased? There are no special rates for pensioners⁴⁰;
- bookings will be complicated by having to book for accommodation separately from park entrance and catering arrangements for larger groups will be complicated; and
- there will be confusion of responsibilities regarding the role of SANParks and the role of the private operators. For example, who will take care of lighting, gardens and roads in the camps.

Respondents who were unsure raised the following concerns:

- it depends on who the operators are. If it ends up like the restaurants and shops then they do not want it;
- it depends if there will actually be improvements in service and accommodation;
- it depends on whether the local community will benefit or not;
- it depends on price increases; and
- it depends on whether the present staff will be negatively affected.

Respondents who were in favour of outsourcing of accommodation gave the following reasons:

- outsourcing will be good because it will create competition; and
- if accommodation improves there will be more tourists.

4.2.5.4 Increase in fees

Item 3 of the questionnaire often resulted in a 'not sure' response from respondents. The researcher thus included this item in the data analysis and explored their reasons for the uncertainty. The majority of the respondents showed concern over the possible rate of increase of the price of accommodation, and said their continued visits to the Park would depend on the level of price increase.

Many respondents, who said that they would still visit the Park, stated that they would visit less often, e.g. once a year as opposed to three times a year. Often they added that they would camp instead of stay in rondavels and other accommodation.

Respondents who said that they would no longer visit the Park mentioned that they would rather go to other more affordable parks.

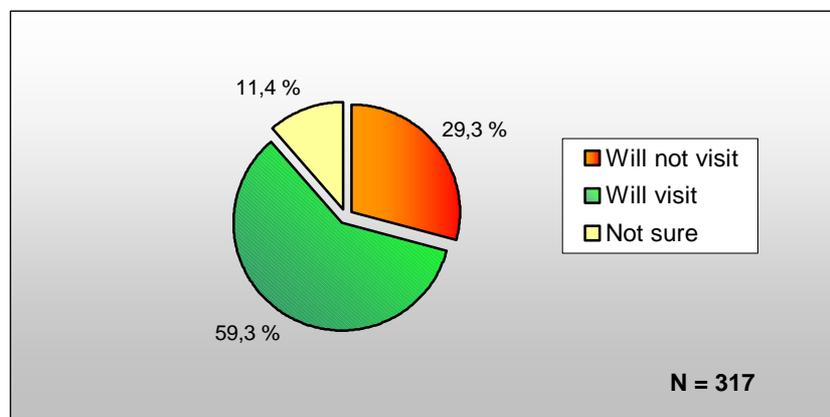
⁴⁰ Not true; pensioners (South African citizens only) enjoy a 40 % discount rate applicable to periods outside the public school holidays.

The percentages and numbers of each type of response are shown in Table 4.22 and Figure 4.19.

TABLE 4.22: Responses regarding continued visits to the Park after a price increase

Response	Count	Percentage
Will visit	188	59,3 %
Will not visit	93	29,3 %
Not sure	36	11,4 %
Total (N)	317	100 %

FIGURE 4.19: Percentages of responses on price increase and continued visits to the Park



4.2.5.5 Different accommodation rates for foreigners

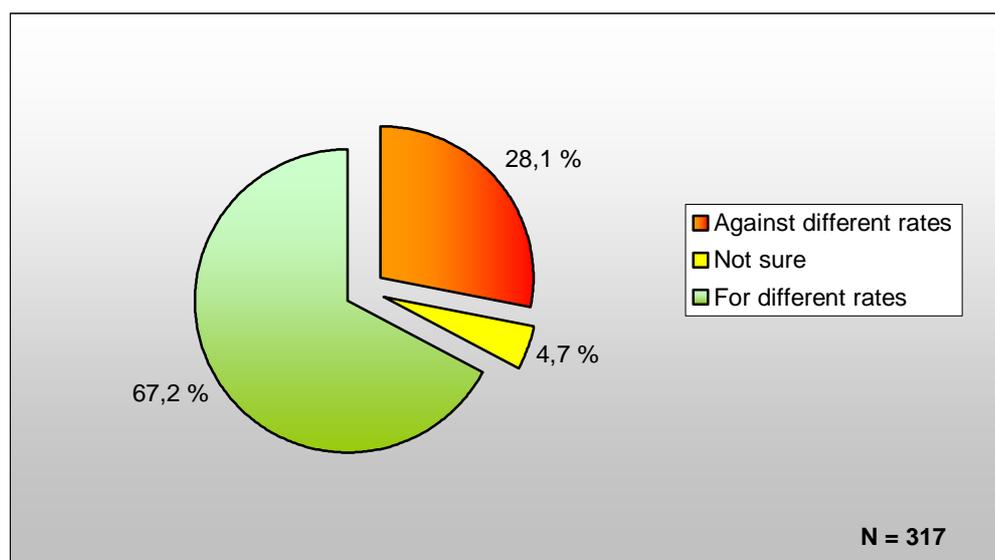
4.2.5.5.1 OVERALL AGREEMENT

The majority of the sample, 67,2 %, agreed that there should be different rates for accommodation for foreigners and South Africans. Most respondents commented that this would be fair since South Africans are already paying tax towards maintaining the conservation estate. Other responses were that this is done in many other parts of the world already and that most foreigners from countries with stronger currencies could afford to pay more. It would not be fair to expect taxpayers in a developing country to subsidize rich tourists from foreign countries.

Respondents who disagreed with the idea of differential rates were concerned about a possible negative impact on tourism and South Africa's attractiveness as a destination in the global tourism market. Table 4.23 and Figure 4.20 below illustrate the responses given in this regard.

TABLE 4.23: Responses regarding different accommodation rates for foreigners and South Africans

Response	Count	Percentage
For different rates	213	67,2 %
Against different rates	89	28,1 %
Not sure	15	4,7 %
Total	317	100,0 %

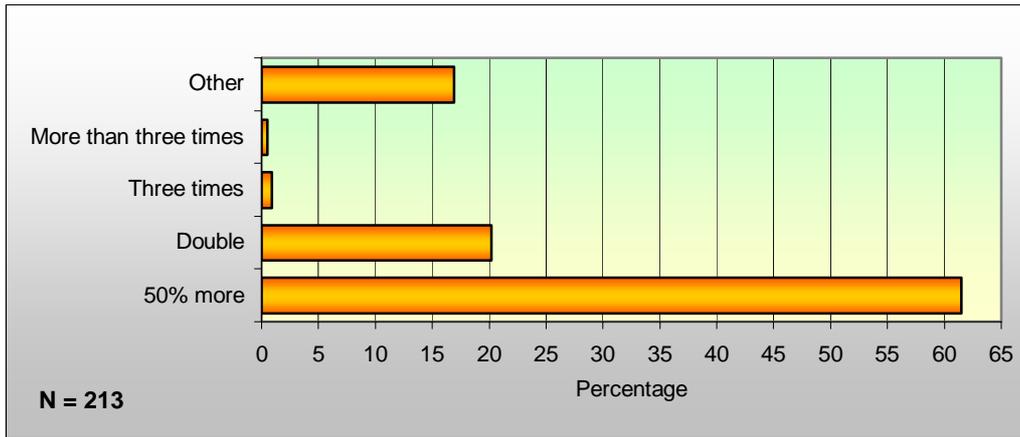
FIGURE 4.20: Percentages of responses on different accommodation rates for foreigners and South Africans

The 213 respondents who agreed that foreigners should pay different rates, were asked to indicate what kind of difference they would consider to be fair. The majority of this group considered '50 % more' to be fair (see Table 4.24 and Figure 4.21). Very few respondents considered 'three times the price or more' to be realistic or fair. A substantial portion (labelled 'other') did not agree with the given options and responded with comments like "Prices must be related to the exchange rate" or "Foreigners must pay in dollars". Some of the respondents from the 'other' group felt that rates of between 15 % and 30 % higher would be fair, but not more.

TABLE 4.24: Respondents in favour of differential rates and appropriate rates of increase for foreigners

Response	Count	Percentage
50% more	131	61,5
Double	43	20,2
Three times	2	0,9
More than three times	1	0,5
Other	36	16,9
Total	213	100,0

FIGURE 4.21: Responses regarding an appropriate rate of increase for foreigners



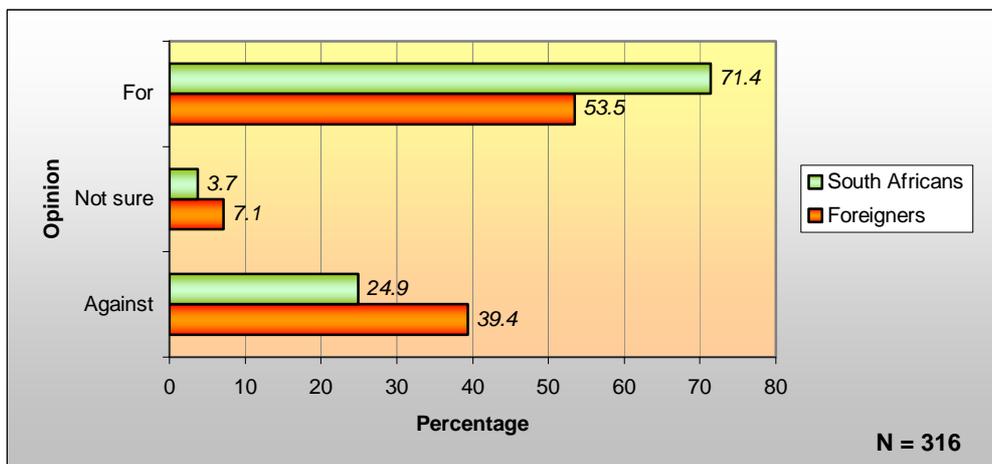
4.2.5.5.2 AGREEMENT BY SOUTH AFRICAN AND FOREIGN RESPONDENTS

When comparing the opinions of South Africans and foreigners about different rates, it was found that a higher percentage of foreigners (39,4 %) were opposed to different rates compared to South Africans (24,9 %). However, the majority of both samples agreed that there should be different rates for foreigners (71,4 % of South Africans and 53,5 % of foreigners). Table 4.25 and Figure 4.22 illustrate the results. (The respondent who did not specify country of origin is not included in the results below.)

TABLE 4.25: Responses of South Africans and foreigners regarding different accommodation rates for foreigners

Response	South African Count	South African Percentage	Foreign Count	Foreign Percentage
Against different rates	61	24,9 %	28	39,4 %
Not sure	9	3,7 %	5	7,1 %
For different rates	175	71,4 %	38	53,5 %
Total	245	100,0 %	71	100,0 %

FIGURE 4.22: Responses of South Africans and foreigners regarding different accommodation rates for foreigners



4.2.6 Discussion and interpretation

The primary objective of this survey was to determine what tourists to the KNP thought about the outsourcing of accommodation. Clearly, for this particular sample, the majority of tourists does not want accommodation to be outsourced and are satisfied with the accommodation as it is. There is a fear regarding price increases and a loss of the “Kruger Culture” if outsourcing were to occur. Many people are unhappy about what they perceive to have happened with the restaurants and shops regarding commercialization, price increases, quality and service, and foresee the same trend affecting accommodation if outsourcing were to be introduced.

Concern was raised about the impact that outsourcing would have on the local communities and present staff. (Many of the staff at both shops and restaurants who were taken over as part of the going concern in September 2001 lost their jobs after the lapsing of the 12 month retention window period). The researcher recommends that if outsourcing of accommodation is to be implemented, mechanisms be devised to protect staff from possible future shedding of jobs by private operators motivated by profit-making ambitions. It is further recommended that favourable entry fees and overnight packages be offered to the local communities in the form of a special Wild Card for local communities.

With respect to the implementation of differential accommodation rates for foreigners and locals, the majority of the South African and foreign respondents supported the idea. However, most respondents agreed that an increase for foreigners of 50 % or less would be acceptable. The researcher recommends that, if differential pricing is implemented, the level of increase should be determined with caution. A number of respondents mentioned that there were many other private game parks that tourists could visit if price increases were to be ridiculously high. There was concern about foreign tourists choosing to visit other natural destinations such as provincial reserves and national parks in other African countries rather than the KNP. Prices related to the exchange rate or dollar rates should be explored.

Although differential pricing is a worldwide practice, its implementation should be carefully considered to avoid creating feelings of discrimination in a country that has become a model to the world on fighting discriminatory practices. The logistics of passport checking to determine nationality will be extremely cumbersome and require that gate systems be upgraded to customs and immigration status. It will also be difficult to justify two rates for the same product or same bed. Nonetheless differential pricing will provide additional funds for conservation purposes if it is carefully and sensitively implemented.

It is recommended that, if SANParks would still seriously consider outsourcing its rest camp accommodation facilities in future, a more comprehensive study be conducted using the present study as a pilot. In addition, if outsourcing were to occur, strict regulations and contract management capacity (Service Level Agreement) should be implemented regarding the preservation of the “Kruger Culture”. Caution would also have to be exercised regarding possible resultant price increases. Although most people responded by saying that they would still visit the Park, many of this group added that they would visit less often and come as day visitors or use camping facilities. Thus it appears that tourism income in the Park would be negatively impacted if outsourcing is introduced. The consequences of commercialization of accommodation facilities in the KNP would need to be explored extensively in terms of its impact in the wider domestic and international markets in the context of the total destination marketing framework.

In conclusion, it is suggested that, should the outsourcing of accommodation still be considered an option, the present survey be extended into an extensive statistically sound investigation to include respondents outside the park on a random basis. It could be argued that respondents that were found in the park already had a pre-conceived position about the park's services.

It was alluded in 3.17.3 that the personal values of a consumer play an important role in his deciding on a holiday destination. The researcher used a value-laddering interview survey to understand what the needs of consumers of KNP products and services are to satisfy their personal values or desires.

4.3 VALUE-LADDERING INTERVIEWS

4.3.1 Rationale for the survey

To the management of any tourism destination and certainly of the KNP it is important to know tourist motivation for their choice of holiday destination. Tourists have been characterized as thinking about holiday destinations as packages of attributes, benefits or value satisfiers. Given the limited capacity of the human processing system, only a few product attributes can be processed at a time. Consumer psychologists are particularly interested in how knowledge about these attributes is represented in memory.

Levitt (1960) was among the first to suggest that consumers tend to think about products and brands in terms of positive or negative consequences and not only in terms of their physical

attributes. These consequences are also known as benefits or perceived risks. This perspective led to the idea of benefit segmentation where marketers divide consumers into homogenous subgroups or segments based on knowledge about perceived benefits stemming from product use.

This perspective was further developed by Sproles *et al.*, (1978) who identified three product attribute levels.

- **A-level:** abstract, multidimensional, difficult to measure, more subjective (most relevant to product class and product form); how a product makes an individual feel.
- **B-level:** less abstract, still multidimensional, more easily measured, more objective; expressed in a fairly direct way; psychological and social consequences.
- **C-level:** concrete, one-dimensional, directly measurable objective attributes; simple physical attributes; tangible, directly experienced through various senses, directly measured.

This distinction implies that consumers might perceive products and brands as providing consequences that are even more abstract than functional psychosocial benefits. These benefits or consequences represent values that are the cognitive representation of consumers' most basic and fundamental needs and goals. The values constitute a major part of consumers' self-concepts and have a powerful and pervasive influence on cognitive processes and overt behaviours (Levitt, 1960).

Several researchers, such as Guttman & Reynolds (1979), Cohen (1979) and Guttman (1997), have developed conceptual models of consumers' knowledge structures that combine different levels of consumers and product meanings. Although these researchers used different terminology, reference is made to three basic components: attribute, consequence and value. The resulting knowledge structure is called a Means-End-Chain.

4.3.2 Objectives

The objectives of this Value-laddering survey were to:

- gain a greater understanding of tourists' knowledge structure of the KNP;
- identify concrete decision-making variables; and
- identify and understand the role of personal values in deciding on a holiday destination.

4.3.3 Methodology

The research involved 60 in-depth laddering-type interviews. In its simplest form, laddering is just repeatedly asking the question, “And why?” ... “And why is that important to you?” and continue until the consumer cannot go further. This type of interview is particularly suitable for revealing qualitative, underlying purchase motives. Within the interview environment the respondent is free to express him/herself without fear or disapproval, admonition or dispute, and without advice from the interviewer.

In carrying out laddering interviews the researcher, assisted by research assistants and using an interview schedule (see Annexure 12), asked respondents to fill in personal information and the destination against which the KNP was being evaluated. Respondents were further requested to identify positive and negative attributes of the KNP (a specific camp) compared to the benchmark destination of their choice. The interviewer had to maintain a non-judgmental tone. The responses of all the respondents were written up in raw form on sheets.

The alternative destinations used by respondents to identify the apparent differences or rational reasons included the sea, mountains, wilderness areas, game reserves (local), game reserves (international), rivers, hunting concession areas, hotels and resorts. Countries frequently mentioned were Kenya, Tanzania, Botswana, Mauritius, Canada, USA, Australia, Greece, Italy, Singapore, Hong Kong and Thailand.

4.3.4 Sample

The sample was drawn from tourists to Skukuza, Biyamiti, Pretoriuskop, Satara, Talamati, Olifants, Letaba, Shimuwini, Bateleur, Sweni Wilderness Trail and Nyalaland Wilderness Trail. To qualify for the study, all respondents had to be responsible for holiday destination decision-making. The interviews were carried out over a five-week period.

4.3.5 Analysis and processing of data

4.3.5.1 Means-End-Chains

Laddering procedures were followed to produce several Means-End-Chains for each respondent. The Means-End-Chains for all individuals were combined or aggregated to produce a knowledge structure that incorporates the most relevant and common Means-End-Chains of individual consumers. According to Reynolds and Jamieson (1984) this is sometimes called a hierarchical value structure map. The basic procedure involves conducting

a thorough content analysis of all the elicited concepts. All the concepts were translated into a common language that captured their basic meaning. The concepts or meanings mentioned by only a few consumers were then eliminated. This left those Means-End-Chains that were mentioned by at least several respondents. The common Means-End-Chains were combined into an aggregate knowledge structure, a network of salient Means-End-Chains, which accurately reflects many of the relevant product meanings for a group of respondents. This processing and analysis produced 10 common Means-End-Chains.

4.3.5.2 Hierarchical value structure maps

To produce a common Means-End-Chain for all 60 respondents, the 10 Means-End-Chains were aggregated to produce an integrated knowledge structure. The cycle followed in 4.3.5.1 was repeated. A thorough content analysis of all the elicited concepts was conducted and the concepts translated into a common language that captured their basic meaning. A similar screening method of concepts or meanings as in 4.3.5.1 was applied to aggregate the knowledge structures.

4.3.6 Results

Table 4.26 reflects the clustering of attributes that produce a hierarchical value structure map influencing respondents' decision to visit the KNP. These have been grouped according to themes and categories and classified or ranked according to the product attribute levels of Sproles *et al.* (1978) (see 4.3.3).

Figures 4.23 and 4.24 show the constructed positive and negative hierarchical value structure maps reflecting levels of decision-making attributes that influence tourists' choice of the KNP as a holiday destination.

4.3.7 Discussion and interpretation

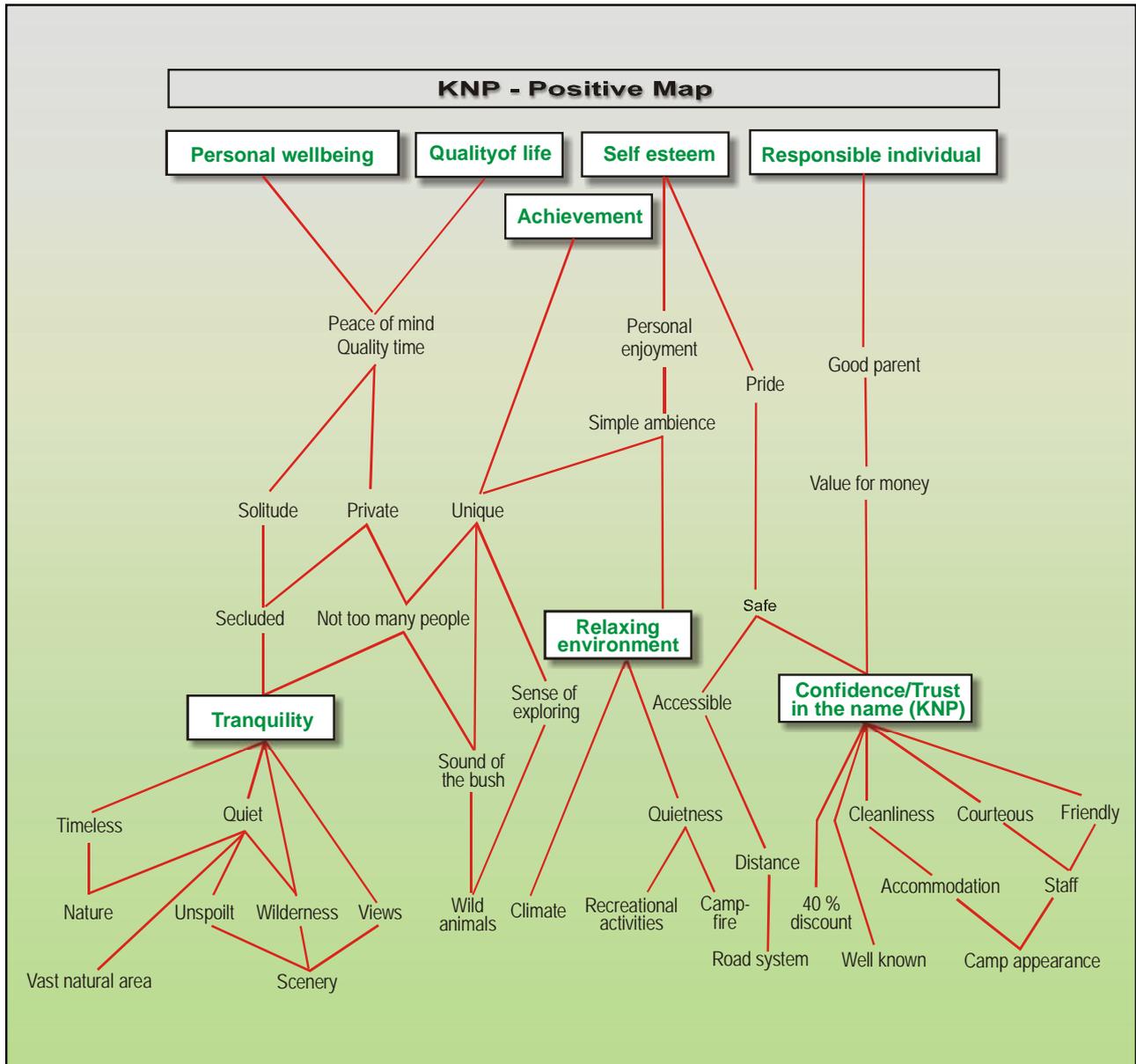
The positive hierarchical structure value map in Figure 4.23 is much busier and more cluttered with positive responses than the negative map in Figure 4.24. The majority of respondents in this interview process regarded a visit to the KNP as something of a status symbol that contributes to their quality of life, personal well-being, self-esteem and achievement in life and makes them feel responsible people in the protection of the environment (A-level Product Attribute). Most of the respondents could be categorized in Stages 3 to 7 (Full nest with

TABLE 4.26: Clustering of positive and negative attributes

TYPE OF DECISION-MAKING	POSITIVE ATTRIBUTES	NEGATIVE ATTRIBUTES
High-level decision-making <i>(Personal Values or A-level)</i>	Achievement Personal well-being Quality of life Responsible individual Self-esteem	Financially unaffordable, financial insecurity hinders personal enjoyment of the park
Psychological consequences <i>(B-level)</i>	Accessible Confidence/Trust in the KNP brand Good parenting to children Not too many people Peace of mind Personal enjoyment Pride Private Quality time Relaxing environment Safe Secluded Sense of exploring Simple ambiance Solitude Tranquility Unique Value for money	Expensive Loss of income Not quiet anymore
Functional or low-level decision-making values <i>(C-level)</i>	40 % discount for pensioners Accommodation Camp appearance Campfire Cleanliness Climate Courteous, friendly staff Distance Nature Quietness Recreational activities Roads system Scenery Sounds of the bush Timeless Unspoilt Vast natural area Views Well known Wild animals Wilderness	Catering (poor food) Distance Lack of activities for kids Lack of recreational facilities Malaria Price hikes Toll gates Unemployment (cannot find work)

children, to empty nest with no children living at home) (see Annexure 12). They felt that a visit to the KNP contributes to good parenthood because children learn more about the importance of environmental protection from their parents.

FIGURE 4.23: Hierarchical value structure map (positive)

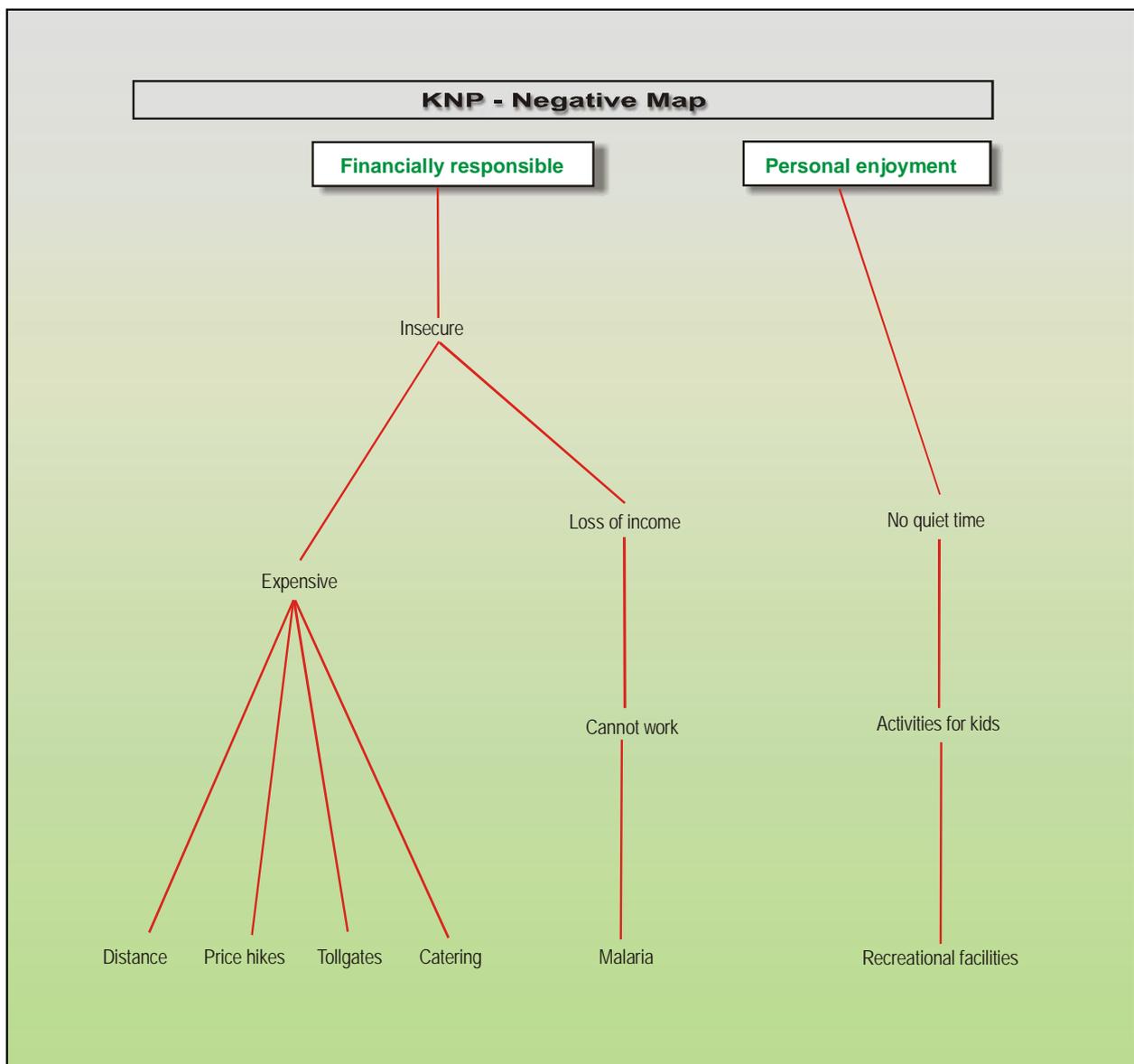


One of the positive attributes expressed by many respondents is the role that wilderness qualities play in the total enhancement of experience of a KNP visit, thus becoming an important deciding value in a choice of holiday destination. Wilderness qualities in the positive map in Figure 4.23 are captured in attributes such as solitude, simple ambience, secluded, timeless, relaxed environment, wilderness, sounds of the bush, tranquility, vast natural area, scenery, views, wild animals and climate. Although these attributes range between Product Attributes Levels B and C, they play a very important role in attracting city dwellers that are looking for peace and quietness in nature. The management of wilderness qualities in the KNP should continue to be part of the tourism management framework (see ROZ Plan, 3.14.4).

During the interviewing process respondents made positive remarks to staff about perceived improvements initiated by Park management over the last three to four years. This generates more trust in the KNP brand. Many of the respondents felt that the KNP was value for money and this observation plays a role in their decision-making.

The negative map (Figure 4.24) is less busy and represents a minority view. The ladders in the map are not dominant and are likely to be present in any product. A small minority felt that the KNP is expensive and unaffordable. A few overseas respondents cited malaria as a threat to their decision-making. The lack of recreational facilities, poor facilities for children, poor

FIGURE 4.24: Hierarchical value structure map (negative)



food, expensive tollgates, price hikes and long distances to travel were often commented upon as negative attributes to their enjoyment of the park. Although the negative map is statistically insignificant, tourists have a tendency to remember a single bad experience out of many positive ones. It is imperative for the KNP management to take these negative comments, no matter how trivial, seriously and improve on the issues that tourists complain about.

Overall, the value-laddering interviews produced invaluable positive information about high-level, medium and low-level decision-making attributes that influence prospective tourists' decision on the choice of a holiday destination. These attributes are the KNP's unique selling points. The proposed management framework should strengthen the role of the ROZ Plan and other indicators of limits of acceptable change in the tourism system, in order not to detract from the Park's unique selling points.

4.4 CONCLUSION

The objective of this chapter was to scientifically establish the demographics of the KNP's tourists and measure the attitudes and perceptions of ratings by tourists of the tourism service-delivery system of the KNP. It was found that the KNP is a truly international holiday destination, attracting tourists from 36 countries (according to these surveys) worldwide and it is competing with the best holiday destinations in the world. It caters for a highly sophisticated nature-conscious customer base, with a high education level, that is looking for something special in the range of products on offer.

The overall finding is that mixed feelings exist among tourists over the level of satisfaction with the product range. Whilst there are pockets of excellence in the service-delivery system, there are also high frequencies of inconsistencies in product quality, standards, services, infrastructure-maintenance and customer services. The KNP's service delivery is unpredictable.

The survey on accommodation-service delivery revealed concerns about the implementation and impact of commercialization in the KNP. Tourists complained that commercialization was eroding the "Kruger Culture". The proposed tourism management framework will have to add a cautionary clause on how this conservation strategy is implemented. SANParks should commission extensive independent research on commercialization before continuing with this strategy.

Furthermore, the measurement exercise sought to establish the real motivations behind tourists' decision to spend their holiday in the KNP. In the Value-laddering interviews that were conducted, respondents indicated that the natural environment, tranquility, aesthetic beauty, wilderness qualities and relaxed atmosphere in the park are the real reasons behind their choice of the KNP as a holiday destination. The wilderness qualities cited in the positive map of the constructed Means-End-Chain should be considered as a unique selling point when the proposed tourism management framework is drafted.

Protected area tourism is not only constituted of the tourism facilities, recreation activities and tourists (whose values have been measured in the three surveys discussed in this chapter). There are other, equally important elements, such as tour operators, destination marketing organizations and communities living adjacent to parks. The opinions of these elements are crucial to the development of an integrated tourism management framework. In Chapter 3 it was alluded that relationships of the KNP with its neighbours were characterized by undertones of mistrust and tensions. Chapter 5 seeks to explore these undertones in a survey designed to determine the state of the park's relations with its adjacent communities.