AN INTEGRATED TOURISM MANAGEMENT FRAMEWORK

FOR THE KRUGER NATIONAL PARK,

SOUTH AFRICA, 2003

by

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OF ABBREVIATIONS AND ACRONYMS

AIDS	Acquired Immune Deficiency Syndrome
ANOVA	Analysis of Variance
ATM	Automatic Teller Machine
CAMPFIRE	Communal Area Management Plan for Indigenous Resources
CBD	Convention on Biological Diversity
DBSA	Development Bank of Southern Africa
DEAT	Department of Environmental Affairs & Tourism
EIA	Environmental Impact Assessment
GLTP	Great Limpopo Transfrontier Park
HIV	Human Immune Deficiency Virus
HR	Human Resources
IDC	Independent Development Corporation
IUCN	International Union for the Conservation of Nature
KNP	Kruger National Park
KZN	KwaZulu-Natal
LAC	Limits of Acceptable Change
MAP	Man and the Biosphere Programme
MEC	Member of Executive Council
NPB	National Parks Board
NPS	National Park Service
PFMA	Public Finance Management Act
PPP	Public-Private Partnership
ROZ	Recreational Opportunity Zoning
RSA	Republic of South Africa
SADC	Southern African Development Community
SARS	Severe Acute Respiratory Syndrome
SATOUR	South African Tourism Board
SD	Standard Deviation
SIC	Standard Industrial Classification Code
SMART	Specific, Measurable, Attainable, Reliable and Time-framed
SWOT	Strengths, Weaknesses, Opportunities and Threats
TFCA	Transfrontier Conservation Areas
THETA	Tourism Hospitality Education and Training Authority
TPC	Thresholds of Potential Concerns
TQM	Total Quality Management
UNCED	United Nations Convention for Environment and Development
UNEP	United Nations Environmental Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
USA	United States of America
VAMP	Visitor Activity Management Process
VERP	Visitor Experience Resource Protection
VIM	Visitor Impact Management
WCED	World Commission on Environment and Development
WCPA	World Commission on Protected Areas
WSSD	World Summit on Sustainable Development
WTO	World Tourism Organization
WTTC	World Travel and Tourism Council
YNP	Yellowstone National Park

DECLARATION

I ……………………………………………................................ hereby declare

that the thesis for the ……………………………………………….…….. degree at

the University of Pretoria, hereby submitted by me, has not previously been submitted

for a degree at this or any other university, and that it is my own work in design and

execution and that all reference material contained therein has been duly

acknowledged.

……………………………………….
Signature

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Date

SUMMARY

TITLE OF THESIS: **An Integrated Tourism Management Framework for the Kruger National Park, South Africa, 2003**

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This study sets out to address problems caused by the lack of an integrated tourism management framework that would give a strategic direction to the delivery of tourism services in the Kruger National Park (KNP). The lack of tourism management plans and capacity in protected areas can be traced back to the classic management approach that concentrates exclusively on biodiversity conservation while paying superficial attention to other equally important management elements such as tourism, community participation, financial viability and governance matters. As a result of such management deficiencies, protected areas are unable to raise sufficient revenue from their tourism business to adequately meet obligations of their conservation mandate, community expectations and maintenance of the tourism facilities. Financial problems lead to over-dependence on diminishing and inflation-eroded state subsidies, thus compromising the effective management of parks. A management approach that does not balance the elements that constitute the management function of a protected area has the potential to destroy the resource base on which the attractiveness of a protected area as a holiday destination hinges and risks alienating tourists. The practice of 'fortress conservation' with protected areas treated as distinct units from their surrounding communities is being challenged worldwide.

Protected area managers are now constantly looking for management paradigms that can harmonize the fundamental functions of conserving biodiversity, delivering tourism services and ensuring financial viability whilst contributing to the socio-economic development and benefits for local people balancing conservation and socio-economic needs. This is the situation in which the KNP finds itself. The study recommends the adoption of an integrated tourism management framework based on adaptive tourism management principles to enable the Park[1] to cope with continuous uncertainties, conflict management, dynamic systems of societal changes, economic changes, changes of ecosystems and bridging the gap between conservation and tourism.

Key terms: *adaptive tourism management principles;*
balancing conservation and socio-economic needs;
benefits for local people;
bridging the gap between conservation and tourism.
effective management;
integrated tourism management framework;
integrated tourism management plan;
protected area tourism;
tourism service-delivery in the Kruger National Park.

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[1] The KNP is also referred to as "the Park" throughout this study.

SAMEVATTING

TITEL VAN PROEFSKRIF:	**'n Geïntegreerde Toerismebestuursraamwerk vir die Nasionale Krugerwildtuin, Suid-Afrika, 2003**
	deur
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PROMOTOR:	**Professor G.D.H. Wilson**
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DEPARTEMENT:	**Toerismebestuur**
FAKULTEIT:	**Ekonomiese en Bestuurswetenskappe**
GRAAD:	**Philosophiae Doctor**

Die doel van die studie is om oplossings te vind vir probleme wat veroorsaak word deur die gebrek aan 'n geïntegreerde toerismebestuursraamwerk wat strategiese rigting aan die lewering van toerismedienste in die Nasionale Krugerwildtuin sal gee. Die gebrek aan toerismebestuursplanne en –kapasiteit in beskermde gebiede kan teruggevoer word tot die klassieke bestuursbenadering wat uitsluitlik op die bewaring van biodiversiteit gekonsentreer het en net oppervlakkige aandag aan ander bestuurselemente gegee het wat ewe belangrik is, soos toerisme, gemeenskapsbetrokkenheid en finansiële lewensvatbaarheid. As gevolg van sodanige gebrekkige bestuur kan beskermde gebiede nie voldoende inkomste uit toerisme genereer om hulle verpligtinge ten opsigte van hulle bewaringsopdrag, gemeenskapsverwagtinge en die instandhouding van toerismefasiliteite na te kom nie. Finansiële probleme lei tot 'n oorafhanklikheid van krimpende staatsubsidies. 'n Bestuursbenadering wat nie 'n balans handhaaf tussen die onderskeie elemente van 'n beskermde gebied nie, hou die gevaar in dat die hulpbronbasis waarop die beskermde gebied se aantreklikheid as 'n toerismebestemming berus vernietig en toeriste vervreem kan word. Die uitsluitende benadering tot bewaring waarvolgens beskermde gebiede as afsonderlike entiteite van aangrensende gemeenskappe bestuur word, word wêreldwyd

bevraagteken. Bestuurders van beskermde gebiede soek voortdurend na bestuursvorme wat die bewaring van biodiversiteit, voorsiening van toerismedienste en finansiële lewensvatbaarheid as fundamentele funksies met mekaar kan versoen en, terselfdertyd, 'n bydrae kan lewer tot die sosio-ekonomiese ontwikkeling van en voordele vir die plaaslike bevolking. Terselfdertyd word 'n balans geskep tussen bewaring en sosio-ekonomiese behoeftes. Dit is ook die situasie waarin die Nasionale Krugerwildtuin sigself bevind. Die studie beveel aan dat 'n geïntegreerde toerismebestuursplan aanvaar word wat op aanpasbare toerismebestuursbeginsels berus en die Wildtuin opgewasse sal maak teen die voortdurende onsekerhede, konflikbestuur, sosiale en ekonomiese veranderings en veranderde ekosisteme en die gaping tussen bewaring en toerisme sal oorbrug.

Sleutelwoorde:

> *aanpasbare toerismebestuursbeginsels;*
> *balans tussen bewaring en sosio-ekonomiese behoeftes;*
> *doeltreffende bestuur;*
> *geïntegreerde toerismebestuursraamwerk;*
> *geïntegreerde toerismebestuurplan;*
> *lewering van toerismedienste in die Nasionale Krugerwildtuin;*
> *oorbrugging van die gaping tussen bewaring en toerisme.*
> *toerisme in beskermde gebiede;*
> *voordele vir plaaslike bevolking.*

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CHAPTER 1

INTRODUCTION

1.1   PROTECTED AREAS UNDER SIEGE

The objective of this chapter is to construct the background to the research problem, present the problem statement and suggest research objectives to be addressed in the investigation process. It also defines the global context in which protected areas are managed and specifically reflect on the type of problems born from a lack of an integrated tourism management plan in protected areas.

The theme of this study is the formulation of an integrated tourism management framework that will bring together the conservation and tourism objectives of the Kruger National Park (KNP) and achieve management effectiveness. Protected areas[2] worldwide are under enormous pressure because they lack integrated management plans that can be used to determine management effectiveness. Management effectiveness refers to the ability of a protected area to deliver environmental, social and economic benefits to a range of stakeholders (Hockings & Phillips, 2003). There is increasing concern that protected areas are not well managed (Dudley *et al.,* 2003) and governments, management agencies and international aid and conservation organizations have begun to devote attention to the question of how to assess management effectiveness of protected areas (Hockings & Phillips, 2003).

A single methodology for assessing management effectiveness is neither desirable nor possible and protected areas should consider developing management plans that will become a "tool box" of approaches from which appropriate methods can be selected to suit individual needs. The need for management plans that can manage, balance and harmonize conservation, tourism and financial resources and bring communities on board to participate in conservation and tourism activities, cannot be overemphasized (Hodgkins, 2001). Unfortunately, existing management plans tend to focus exclusively on conservation of biodiversity in relative exclusion of other collaborating elements like tourism, financial resources, human resource planning, corporate governance and general management that

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[2] Protected area: an area of land and/or sea especially dedicated to the protection and maintenance of biological diversity, and of associated cultural and natural resources, and managed through legal or other effective means (IUCN, 1994).

constitute protected area management. Protected area managers and conservation agencies are not sufficiently qualified or experienced to manage tourism in a professional manner (Strasdas, 2002).

There is wide agreement that much more needs to be done to improve the effectiveness of protected area management (Hockings & Hobson, 2000). It is imperative that when tourism is an integral part of management activities, management frameworks and strategies are put in place to ensure that it supports and maintains the natural and associated socio-cultural values of protected areas (Eagles *et al.*, 2002). Maintaining this delicate balance is a challenge involving difficult judgements on the trade-offs that occur between tourism development and the objectives of natural resource protection for which protected areas are established, and the provision of benefits to the public (Mabunda & Fearnhead, 2003).

Within the broad category of protected areas are national parks, wilderness areas, nature reserves, marine parks and cultural landscapes or sites that are managed for different purposes (IUCN, 1994). A comprehensive classification of protected areas is attached as Annexure 1. Protected areas constitute a critical part of every nation's strategy for dealing with the conservation and sustainable use of biodiversity and landscapes. Although they vary considerably in their objectives and the effectiveness with which they are managed (see Table 1.1), they provide powerful evidence of a nation's commitment to conservation and sustainable development (Harrison, 2002).

TABLE 1.1:   Categorization of protected areas

CATEGORIES	SUMMARIZED DESCRIPTION
Ia	**Strict Nature Reserve/Wilderness Protection Area:** Protected area managed mainly for science
Ib	**Wilderness Area:** Protected area managed mainly for wilderness protection
II	**National Park[3]:** Protected area managed mainly for ecosystem protection and recreation
III	**Natural Monument:** Protected area managed mainly for conservation of specific natural features
IV	**Habitat/Species Management Area:** Protected area managed mainly for conservation through management intervention
V	**Protected Landscape/Seascape:** Protected area managed mainly for landscape/seascape conservation and recreation
VI	**Managed Resource Protected Area:** Protected area managed mainly for the sustainable use of natural ecosystems

Adapted from IUCN, 1994

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[3] Emphasised to highlight the theme of this research study.

The IUCN protected area classification system is based on the individual protected area's primary objective of management.

TABLE 1.2: Management objectives and IUCN protected area management objectives

Management Objective	Ia Strict Nature Reserve	Ib Wilderness Area	II National Park	III Natural Monu-ment	IV Habitat/ Species Man. Area	V Protected Landscape/ Seascape	VI Man. Resource Protected Area
Scientific research	1	3	2	2	2	2	3
Wilderness protection	2	1	2	3	3	-	2
Preservation of species and genetic diversity	1	2	1	1	1	2	1
Maintenance of environmental services	2	1	1	-	1	2	1
Protection of specific cultural/natural features	-	-	2	1	3	1	3
Tourism and recreation[4]	**-**	**2**	**1**	**1**	**3**	**1**	**3**
Education	-	-	2	2	2	2	3
Sustainable use of resources from natural ecosystems	-	3	3	-	2	2	1
Maintenance of cultural/traditional attributes	-	-	-	-	-	1	2
Key: 1 = primary objective; 2 = secondary objective; 3 = potentially applicable objective							

Adapted from IUCN, 1994.

Table 1.2 shows how an analysis of management objectives can be used to identify the most appropriate category. In terms of this classification some kind of recreation and tourism is likely to occur as a management objective in every category of protected areas except Category Ia (the strict nature reserve). It shows that biodiversity protection in protected areas, though a critically important function, is far from being the only purpose and is often not the exclusive purpose of a protected area. It is a fundamental requirement of the IUCN that any protected area should always have a special policy to protect and maintain biodiversity (IUCN, 1994). Such a policy is often expressed in a country's legislation governing conservation systems and an individual park's management plan, and should include all other elements that constitute the management of a protected area such as tourism management, financial

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[4] Emphasised to highlight the theme of this research study.

management, corporate governance, human resources, training and development and other relevant management activities.

In terms of the IUCN categorization of protected areas, Category II areas can use their resources for non-extractive recreation through tourism. According to this designation, a national park is land set aside to promote outstanding natural and scenic areas … "*for scientific, educational and recreational use"* (McNeely *et al.*, 1994:10). National Park areas are not to be materially altered by human activity and extractive resource usage. In other types of protected areas the balance shifts towards sustainable use such as the many Category V national parks found in Europe (Vaughan, 2000). It is in the area of the provision of recreational benefits by national parks that a hiatus exists between conservationists and tourism practitioners (Phillips, 2003a).

1.2   TOURISM MANAGEMENT IN PROTECTED AREAS

The Convention on Biological Diversity (CBD) of 1992 is the framework for national and international actions to build bridges between the needs of nature and mankind. Its objectives include the conservation of ecosystems and species as well as the sustainable use of these resources and the fair sharing of their benefits (Van der Zande, 2003). The challenge that protected areas face is how to conserve biodiversity while at the same time meeting legitimate demand for the socio-economic development of an ever-increasing world population.

Tourism in protected areas focuses on showcasing the best examples of a country's biological and cultural assets. It is no coincidence then, that one of the most urgent points of intersection between tourism and conservation occurs within protected areas, sites chosen because they are a nation's biological and cultural jewels (Boo, 1993). When tourism is a critical component of park management, it is important for a park to have staff members who are experts in the field to ensure that tourist experience is of the highest quality (Eagles *et al.*, 2002).

While protected areas may obviously benefit tourism, tourism can benefit protected areas through exposure of the public to the natural world, creating opportunities for improved environmental education and awareness, generating revenue for maintenance and management of protected areas, job creation in the region and the promotion of economic development of the local communities. Achieving these desirable outcomes is a challenge faced by protected areas today (Boo, 1993).

Tourism will always produce negative environmental impacts despite the best efforts of protected area managers to curb such consequences (Cole *et al.,* 1987; McNeely & Thorsell, 1989; Buckly & Pannell, 1990). Impacts occur at the site or system level. Because tourism in protected areas is drawn to environments that are inherently sensitive, it is vital that the impacts be assessed as accurately as possible to establish if they are acceptable to all role-players. It helps to balance the scales when assessing such impacts by considering what environmental impacts would have occurred if the park and its tourism industry were to be replaced with alternative land use such as agriculture, forestry, mining or urbanization (Dowling, 1993). Table 1.3 lists the negative impacts of human use on the environment. Managing tourism impacts in protected areas is proving to be difficult to accomplish without determining the necessary tourism thresholds of concern as a result of the historical neglect of tourism research by protected area managers (IUCN, 2001).

TABLE 1.3:   Negative impacts of human use on the environment

Trail creation (and deterioration)	Habitat loss
Camp–sites (and deterioration)	Emissions and air pollution
Litter	Firewood collection
Overcrowding	Visual and noise impacts
Tracks and recreation vehicles	Overfishing, undersized fishing
Warehousing and packaging	Impacts on vegetation
Human waste problems	Damage to sand dunes/reefs
Wildlife disturbances, habitation or impact	Soil compaction or erosion
User conflicts	Increased fire risk
Water pollution (physical or biological)	Damage to archaeological sites
Over-development	Trampling (human or horse)
Weeds, fungi and exotic species	Changed water courses
Cultural vandalism	Taking souvenirs (fauna and flora)
Boats damaging dams or river banks	

Sources: Cole *et al.*, 1987; McNeely & Thorsell, 1989; Buckley & Pannell, 1990

Environmental and human use activities are undermining the capacity of ecosystems to assimilate impacts. Ecological functions and habitats are being destroyed at an unprecedented rate and the current level of species loss is greater than at any time in history. Poverty eradication, fuel, food security, provisioning of fresh water, soil conservation, human health, tourism and recreation**,** all depend directly upon maintaining and using the world's natural resources (Van der Zande, 2003).

Table 1.4 details examples of environmental risks associated with tourism activities[5]. It was because of such risks that the concept of ecotourism came into existence.

TABLE 1.4:   Environmental risks from tourism

Elements	Examples of risk from tourism activities
Ecosystems	• The construction of accommodation, tourist centres, infrastructure and other services has a direct impact on the environment because of vegetation removal, animal disturbance, elimination of habitats, impacts on drainage and others • Disruption of wildlife grazing routes by tourist travel
Soils	• Soil compaction occurs in well-used areas • Soil removal and erosion occur and may continue after disturbance is gone
Vegetation	• Concentrated use around facilities has a negative effect on vegetation • Transport may have direct negative impacts on the environment (e.g. vegetation removal, weed transmission, animal disturbance and others) • Fire frequency may change due to tourist and park tourism management
Water	• Increased demands for fresh water • Disposal of sewage or litter in rivers, lakes or oceans • Release of oil and fuel from ships and smaller craft • Propeller-driven watercraft may affect certain aquatic plants and species
Air	• Motorized transportation may cause pollution from emissions
Wildlife	• Hunting and fishing may change population dynamics • Impacts occur on insects and small invertebrates, from effects of transportation, introduction of alien species and others • Disturbance by tourists can be experienced by all species including those that are not attracting tourists • Disturbance can be of several kinds; noise, visual or harassing behaviour • Impacts can last beyond the time of initial contact (e.g. before heart-rate returns normal, or before birds alight, or mammals resume breeding or eating) • Animals might be killed on the roads by cars or by boat impacts or propellers on water surfaces or the sea. • Habituation to humans can cause changed wildlife behaviour such as approaching people for food

Adapted from IUCN, 1994

The rise of ecotourism[6] and sustainable tourism was a direct response to the need to manage impacts of human activities on the environment. Sustainable tourism strategies are designed to manage park tourism to maximize positive benefits and minimize environmental impacts before they occur. This is best achieved through carefully designed management plans (Buckley & Pannell, 1990). A key issue is to be sensitive to cumulative impacts, practice adaptive management (viewing management actions as experiments) and to achieve consensus among stakeholders about how much impact is acceptable and where in the protected area (Cole *et al.*, 1987).

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[5] Scales or indexes of extent of degradation or impact cannot be generalized and would have to be measured at each protected area level.

[6] This study is not about ecotourism; however, it argues for the integration of ecotourism principles in achieving sustainable tourism practice in protected areas to promote management effectiveness.

Tourism stands to lose more if protected areas were to be environmentally degraded and this is likely if it continues to be performed on an *ad hoc*-basis. Protected areas in their traditional definition are "islands" to their communities (Matawonyika, 1989) and the non-involvement of local people in such activities is becoming controversial and threatening their survival in many developing countries (Strasdas, 2002). However, the issue of community involvement should be approached very carefully with sound management strategies to avoid a situation where communities interfere in the professional daily management of the park or the prospects of benefits fuel suspicions and conflict between and within communities (Jaireth & Smyth, 2003). It is good business practice to involve communities in a social investment context without raising unrealistic expectations of entitlement. Tourism in protected areas has evolved in a reactive manner within a weak conceptual and policy framework to embrace social responsibilities and environmental integrity (Carruthers, 1995; Van Sickle & Eagles, 1998).

1.3   LACK OF PRODUCT QUALITY

Another problem associated with the lack of integrated tourism management plans in protected areas is that their tourism businesses lack emphasis on product quality. In the past two decades the tourism industry has experienced a dramatic rise in consumer awareness of the concept of product quality (Eagles, 1995a). The private sector in particular has learnt that consumers demand high quality products and that such products are an important component of market advantage (Eagles & Wind, 1994). Unfortunately, the public sector and organs of state (parastatals) have seriously lagged behind in this area. Most park managers give very little, if any, attention to tourist use quality, the prevailing attitude being that consumers take or leave what is provided. This unfortunate attitude to product quality is faltering as sophisticated tourists with high personal values and tastes frequently pursue those destinations providing higher levels of product quality (Eagles & Wind, 1994; Eagles, 1995a). Poor quality of products can cost a protected area its market share.

1.4   REVENUE GENERATING PROBLEMS

Many protected areas suffer from chronic financial problems that inhibit them from carrying out their conservation mandate adequately due to lack of integrated management plans that compel them to manage parks on business principles without forsaking their environmental management obligation (James, 1999). Protected areas did not see the need that all revenue-earning activities had to generate surplus based on real costs of building, maintaining and operating the facilities (Hughes, 2003). The result has been an over-dependency on state

subsidies without much attention being paid to creating alternative options of revenue generation. It is believed that many conservation agencies of the world are cash-strapped or survive on a shoestring budget (Van Sickle & Eagles, 1998; Eagles *et al.*, 2001).

In the 1980s it appeared that virtually every state in Africa was slashing conservation budgets and thus the funding problem became a risk that had to be considered in future planning processes (Hughes, 2003). The IUCN has noted with concern the continuing under-funding of conservation agencies by governments to such an extent that there are insufficient funds to carry out conservation programmes (James, 1999; Eagles *et al.*, 2002). Reynolds (1995) points out that the National Park Service (NPS) of the United States, the largest government park tourism provider in the world, faced large budget cuts in 1996. Figgis (1993) and Wescott (1995) reported that the Australian park agencies were severely starved for funding. In Queensland, for example, the National Parks Agency complained that the recent expansion in the number of national parks was not matched by an increase in funds for management (Dickie, 1995).

The results of this under-funding are manifesting themselves in infrastructure being in a state of poor repair, some facilities closed during peak holiday periods due to safety risks, inefficient information systems, low levels of tourist services and "paper parks"[7]. Park budgets have not kept pace with tourist use increases (Eagles, 1997). Until the funding noose started tightening, conservation agencies worldwide did not see the need to engage in business/commercial practices such as profit making and marketing. The state provided them with the financial allocations they required to run their operations.

Because of the history of dependence on government funding it is least surprising that commercial and marketing professionals and other non-conservation but relevant practitioners were not previously employed by conservation agencies (Van Sickle & Eagles, 1998). Many existing park tourism systems have been developed from conservation, geography and town-planning frameworks and not from a tourism or commercial business perspective, hence their rigidity in embracing commercial business principles in managing tourism.

According to Lindberg & Enriquez (1994), protected areas have many options to generate revenue besides their traditional funding source, state subsidies, tourist user fees and donor funding. They can raise funds by:

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[7] Paper parks are parks that exist on paper only due to resource constraints and the inability of governments to mobilize sufficient resources to manage such protected areas effectively.

- selling tailor-made specialized park merchandise such as clothing, equipment and publications;

- encouraging major crafting industries around parks where the park agency can facilitate contact between craftsmen and tourists involving communities living within or around the areas, bringing jobs and income to the communities involved;

- selling "intellectual property" associated with their names and images as part of their brand marketing strategies;

- adopting public-private sector partnerships in commercialization programmes where certain non-core businesses are awarded to the private sector with a strong community empowerment component and charge concession fees; and

- collaborating with governments to introduce corporate tax incentives for investment in protected areas.

The problem of finances in protected areas is both complex and sophisticated. Clearly protected area agencies require staff members that are specially trained in financial management, accounting, marketing, fundraising and tourism management to achieve the desired financial objectives. The future of protected areas depends on competent financial management and sound marketing in collaboration with biodiversity management functions (IUCN, 2000).

1.5   LOSS OF BIODIVERSITY DUE TO TOURISM DEVELOPMENT

There exist a group of environmentalists or "green" fanatics that blame tourism for the loss of biodiversity.   Biodiversity refers to *"variability among living organisms from all sources, including terrestrial, marine and other aquatic ecosystems and the ecological complexes of which they are part"* (UNEP, 2002:122). This definition includes diversity within species (genetic diversity), between species and of ecosystems. Biodiversity is a term from ecology rather than from tourism. Biodiversity also provides genetic resources for food and agriculture and therefore constitutes the biological basis for world food security and support for human livelihoods (UNEP, 2002). Protected areas are home to most of the world's biological diversity and the perception that tourism threatens the future survival of the system of protected areas (refer to Tables 1.3 and 1.4 in paragraph 1.2) has resulted in ongoing conflicts between conservationists and tourism practitioners (Bishop *et al.*, 1995).

Some components of biodiversity are significant tourist attractions (Buckley, 1994). For mainstream tourism the best-known biological attractions are large charismatic mammal species such as the Big Five in Africa, bears in Alaska, or whales in the world's coastal areas.

In many parts of the world tourists travel to see forests, wildflowers, birds, fish, coral and many other species of biological life forms (UNEP, 2002).

In reefs and rainforests, for example, it is the diversity of species rather than any single species that attracts tourists (Boo, 1993). Tour guides worldwide, as part of their marketing strategy, emphasize the range of smaller species in selling the total experience in addition to tigers, wolves, polar bears, gorillas or the big mammals of Africa. Even diversity at the genetic level can contribute to tourism as an attraction. Biodiversity therefore provides a primary attraction and critical underpinning for a distinct sub-sector of the tourism industry, namely ecotourism[8] (Buckley, 1994).

Protected areas were created to reduce the loss of biodiversity. However, it is becoming increasingly evident that parks alone cannot adequately solve the problem of misuse of land and habitat destruction. The "green movement" fears that uncontrollable tourism development is a potential threat to conservation of the ever-diminishing biological diversity (Buckley, 1994). Although hailed as a saviour of biodiversity over the years, the system of protected areas has drawn huge criticism from stakeholders who have expressed concerns against the protected area concept as it currently stands (UNEP, 2002). The concerns include, *inter alia:*

- the tendency to treat protected areas as "islands" set apart from the surrounding areas;
- the tendency to see protected areas as an alternative to, rather than one element of a national strategy for the protection of biodiversity;
- failure to integrate the requirements of protected areas into policies of sectors (e.g. agriculture, tourism, transport) which affect them;
- inadequate recognition of the needs and interests of local people upon whose support the long-term survival of protected areas depend; and
- limited public and institutional support for protected areas (Bishop *et al.,* 1995; UNEP, 2002; Phillips, 2003a).

Although all hopes are pinned on tourism to generate sufficient revenue to save struggling protected areas, without integrated management plans tourism might never be a panacea for protected area funding problems because of its dependence on unpredictable variables. For example, if a country experiences political instability, tourism will decline. It can never replace

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[8] Ecotourism is defined by the Ecotourism Society as "responsible travel to natural areas which conserves the environment and improves the wellbeing of the local people" (Lindberg *et al.,* 1998:8). Sensitive environmental destinations like national parks are encouraged by the Ecotourism Society to incorporate ecotourism principles in their tourism business to make it sustainable. Chapter 2 briefly deals with this aspect in a management context to achieve sustainable tourism.

the need for public financing of the conservation mandate (Vaughan, 2000; Harte, 2001). There are signs indicating a new thinking or paradigm shift in the manner in which protected areas are being managed because of the criticisms reflected above.

While no one would seriously argue for doing away with protected areas altogether, many people believe that it is time to look across the board at the way in which protected area policy is developed, implemented and managed, and that this should be done in a multidisciplinary manner rather than viewing each function on an *ad hoc*-basis or in isolation (Hodgkins, 2001). If protected areas are to survive the unpredictable challenges of the complex and dynamic world, they need adaptive management plans that will make them continue to reinvent themselves with time and changing societies.

The Kruger National Park (KNP) is the study unit of this research project and manifests many of the problems associated with a lack of a tourism management plan to guide tourism activities and ensure that the ecological integrity of the park is not eroded.

1.6   MOTIVATION FOR THE STUDY

1.6.1   Conflict between tourism and conservation

The last 100 years of conservation success in the KNP focused on the development of the conservation ethic while tourism happened by default. Conservation and tourism were managed as separate water-tight compartments with conflicting objectives. The approach to tourism management was that tourism should not be allowed to dictate policy to the conservationist as tourism was perceived to be a threat to wildlife and that there was an urgent need to curb park usage by tourists. The management philosophy was not open to the notion of the integration of socio-economic issues into biophysical management. According to Biggs (2003), the level of fragmentation was not only evident between departments but could also be discerned from the tradition in biophysical management of conducting uni-disciplinary and single-species studies by natural scientists.

Incumbents drawn from the pool of rangers and scientists always occupied the position of Park Warden and senior management positions in the KNP. Their approach to tourism management exacerbated the historical restrictive management style. Conservationists disliked the idea that they owed their existence to tourism because the latter was the "goose that was laying the golden egg" (Joubert, 1986a). This animosity would surface when decisions concerning the introduction or expansion of tourism products and facilities were to

be made. Whilst it would have been in the interest of the KNP to provide more products and facilities to maximize income from tourist fees, conservationists would veto such vital revenue-earning initiatives. Tourism in general was treated as a secondary activity and one that did not deserve centre stage attention.

1.6.2   Lack of social research

The KNP database reflects records of documented research studies that have occurred over the last 105 years. The overwhelming majority of research studies are on biological diversity and the remainder is shared between social ecology and tourism (Braack, 1997b). None of the studies conducted to date have attempted to provide the KNP with a management plan that bridges the gap between conservation, tourism, financial management, corporate governance and community involvement imperatives. As a result of this anomaly the few tourism studies that have taken place have tended to be fragmented by addressing single aspects of the tourism product in relative isolation from the tourism industry, needs of tourists, conservation sensitivities, community aspirations, financial considerations and the changing socio-political and economic landscape (Pollard *et al.*, 2003).

The KNP is held in high esteem in biodiversity research management and boasts some of the best-qualified internal and external scientists available in the country. Unfortunately there has been no comparable research of equivalent scope and quality in the field of tourism management despite the dependency of the KNP on revenue earned from this line of its business. The reasons for the dearth of social and tourism research in the KNP are related mainly to historical and capacity reasons.

"Scientific research" in the KNP was always strictly mandated to conduct natural science research and scientists were expected to treat this directive as dogma. In the 1990s a new breed of scientists attempted to engage in social and cultural research but were "discouraged" because this was seen to be the domain of another department. Tourism research was also understood to be the responsibility of the division of tourist management services who then had to conduct such research themselves or contract skilled service providers. This is the reason why the scientific research section performed scientific research and only employed natural scientists. It was only when national legislation in the mid-1990s compelled SANParks to conduct Environmental Impact Assessments (EIAs) for all new developments and renovations that scientists (because there was no one else it could be passed on to) were obliged to take on human-related studies to comply with the new legislation. The lack of focus

on tourism research reflects an institutional shortfall at high level and not a narrow-minded view of the KNP scientists[9].

1.6.3   Qualifications of tourism managers

Many tourism managers and staff in the KNP and other national parks do not hold appropriate tertiary qualifications to meet the need for tourism management, research or to improve service levels (see Table 1.5). A human resource development study commissioned by SANParks in 1999 found that the majority of managers and key staff in the tourism department had no relevant tertiary qualifications in tourism and this deficiency affected their capabilities to develop integrated management plans to improve service quality (SANParks, 1999). The dearth of management and research skills is not experienced only in the tourism department but in social ecology as well, because of the already mentioned historical reasons. There is an urgent need for the development of a management plan that would address research needs and capacity building for tourism and social research.

From Table 1.5 it is clear that many hospitality managers (administrative heads of rest camps) are not trained in tourism or hospitality management, thus resulting in a low skills base for tourism. It is imperative to devise a good human resource development plan to equip staff with the necessary skills to deliver a high quality product.

1.6.4   Previous attempts at formulating management plans

The researcher has uncovered many reports, memoranda and agenda items submitted to the Board of Trustees with regard to the control of tourist behaviour and provisioning of infrastructure in the early days of the KNP. Notable among such reports and memoranda are those pioneered by park wardens Col. Sandenbergh and Louis Steyn in 1947 and 1956 respectively. Sandenbergh was concerned about the future development of tourist facilities and to keep human interference to a minimum (Sandenbergh, 1947). Louis Steyn's report to the Board was specifically focused on curbing uncontrolled and unplanned growth of tourist numbers to the park that in turn forced the Board to provide for more facilities with the risk of debasing the wilderness qualities of the park. Steyn wanted the Board to restrict tourist growth to no more than 80 000 tourists per annum (Steyn, 1956). Those early reports cannot be regarded as tourism management plans. Most of these were simply reacting to tourist-related problems rather than devising proactive policy statements and management guidelines.

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[9] Interview with Dr L.E.O. Braack (a KNP researcher for 25 years and former Head of Scientific Services) on 14 April 2003,

TABLE 1.5:   **Qualifications of senior tourism managers in 2003**

JOB TITLE	CAMP	QUALIFICATIONS
General Manager: Tourism	Skukuza Corporate Office	B Comm Cert in Dev Management (CPMD)
Manager: Hospitality Standards	Skukuza Corporate Office	Dipl in Hotel Management & MBA Tourism
Hospitality Manager …………..	Bataleur …………………………..	Matric
Hospitality Manager …………..	Berg-en-Dal …………………….	Std 8 + Dipl in Hotel Management
Hospitality Manager …………..	Biyamiti …………………………..	Matric
Hospitality Manager …………..	Crocodile Bridge ………………..	GCE 'O' + Dipl in Agricultural Engineering
Hospitality Manager …………..	Letaba ……………………………..	Matric
Hospitality Manager …………..	Lower Sabie …………………….	Std 8
Hospitality Manager …………..	Olifants …………………………..	Matric + CPMD
Hospitality Manager …………..	Orpen …………………………….	BA + HED
Hospitality Manager …………..	Talamati …………………………..	B. Tech in Tourism Management + Nat Dip in Travel
Hospitality Manager …………..	Pretoriuskop …………………….	Matric
Hospitality Manager …………..	Punda Maria …………………….	Matric + Cert in Management
Hospitality Manager …………..	Satara ……………………………..	Matric + Dipl in Hospitality Management
Hospitality Manager …………..	Shimuwini ……………………….	Matric + Dipl in Public Admin
Hospitality Manager …………..	Shingwedzi ………………………	B. Admin
Hospitality Manager …………..	Sirheni …………………………….	Matric + Primary Teachers' Diploma
Hospitality Manager …………..	Skukuza …………………………..	Matric + Cert in IR, Cert in Management Training
Hospitality Manager …………..	Mopani …………………………..	Matric + CPMD

In 1951 a one-man commission of inquiry, the Hoek Commission, was appointed to conduct an investigation into the affairs and administration of the Board. In its report it recommended, among others, the establishment of a Department of Park Development and Tourism in the KNP. This department was tasked with the development of infrastructure that was to dominate the park's agenda for the next 30 years (Hoek Commission, 1952). Although the Hoek Commission helped to establish a formal tourism management structure in the KNP, conservationists largely dominated the Park's decision-making process with very little opportunity provided for participation by tourism staff. The establishment of a tourism department did not yield many benefits, as its approach was to react rather than to be proactive, with capabilities of forecasting and strategic planning. There were no qualified managers in tourism or hospitality to drive the department towards a stated vision. The Hoek Commission's findings were used rather to "transform the administration of the NPB into an all Afrikaner one" (Carruthers, 1995).

In 1981 Dr Tol Pienaar, then KNP Park Warden, submitted a 10 year development plan specifically aimed at development of tourism accommodation and roads (Pienaar, 1981). In this plan there were proposals for the Mopani and Berg-en-Dal rest camps, among others. Due to insufficient funds not all the proposed camps came to fruition. Mopani was a complete miscalculation in terms of size and location. The camp struggles to fill its capacity and is a huge financial drain on the Park's revenue. Subsequently, Dr Salomon Joubert, Pienaar's successor, submitted a revised 10-year plan to the Board mainly for the improvement of tourist facilities (Joubert, 1987). However, there is no evidence that those development plans were linked to integrated tourism management plans or financial resources. Many of them were motivated by public demands for better conveniences and facilities. The general expectation was that government would fund such initiatives.

The current KNP management plan acknowledges its shortcomings in providing for a tourism policy and management plan due to a number of prevailing constraints at the time resulting into superficial attention being paid to tourism. The positions of major potential contributors to such a policy, viz. the Chief Executive, General Manager: Tourism (KNP), Director: KNP and the Director: Tourism and Commercial Development, were vacant and about to be filled. Nevertheless, broad guidelines attesting to tourism being an essential adjunct to the concept of wildlife conservation were adopted. The principles of the Recreational Opportunity Zoning (ROZ Plan[10]) and roads carrying capacities were retained as guidelines for tourism development (Braack & Marais, 1997). The ROZ Plan on its own does not constitute a tourism management plan but is but one of the monitoring tools in a park manager's "tool box" (the ROZ Plan is explained in detail in 3.14.4.)

1.6.5   Lack of strategic direction

Since the introduction of tourism in its parks SANParks never had a tourism department at corporate level (Head Office) until the position of Director of Commercial Development and Tourism was created in 1996 (NPB, 1996). This decision was resisted at Directorate level and was one of the reasons that led to tensions between the then Chief Executive, Dr G A Robinson, and the Board, in protest against what he perceived as watering down the conservation mandate of SANParks. The Board stuck to its intentions and in 1998 Mr Richard Willys was appointed as the first ever Director of Commercial Development and Tourism to

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[10] The Recreation Opportunity Zoning plan (ROZ Plan) describes the different use zones within Kruger, as well as its proposed uses and Limits of Sophistication applicable to the different zones. The zones are (with approximate sizes): Pristine Wilderness (26 %), Primitive Wilderness (33 %), Semi-primitive motorized (32 %), Concession Areas (5 %) and Highly Developed (4 %).

give a strategic direction to tourism and the newly adopted commercialization policy (SANParks, 1998). Unfortunately, the newly created department has not yet succeeded in providing a strategic tourism management plan to give the organization a strategic tourism direction. Many of the recent tourism products such as the concession areas (green fields) and the new Wild Card pricing policy have been added on *ad hoc* basis as a result of pressing needs for financial viability to fund the ever costly conservation needs.

1.6.5   Aspects of tourism already researched in the KNP

There have been a handful of studies on tourism management in the KNP to date. One that is often quoted is by Ferreira & Harmse (1999) on spatial analysis of the social carrying capacity of the roads in the KNP. It identified early warning signals of tourist congestion on roads during peak holiday periods and suggested a sustainable scale for tourism development in the park by using the concept of carrying capacity as a management tool. The study's findings concluded that it would be impossible to determine the "magic number" of tourists for the KNP due to a changing socio-economic and political landscape. Such factors exert pressure on the KNP to make it more available to a broader segment of the population. The study suggests various tourist impact management methods to relieve traffic congestion during peak season and public holidays; however, it does not constitute a holistic tourism management plan.

Novellie *et al.*, (1999) discussed the principle of peripheral development and its relevance to parks under the jurisdiction of SANParks. One of the views suggested in this publication is that peripheral development should be applied as a general rule, and that in future all major developments of infrastructure should be on the periphery rather than in the interior of a park. The consensus was that, although there could be merit in adopting the principle in terms of tourism development for parks in general, there are circumstances in which developments on the periphery of a park could be deleterious. Unfortunately it would not be possible to relocate existing infrastructure to the periphery, as costs would be prohibitive. Novellie *et al.*, (1999) recommended that the principle does not merit the status of a rule but should be one of the options to be considered when supported by the findings of a feasibility study. The discussion paper of Novellie *et al.*, (1999) cannot be regarded as a tourism management plan. It deals with but one aspect.

Van Riet (1987), in an unpublished PhD thesis, developed a computer-based theoretical planning tool for infrastructure development using the KNP as a case study. The study proved that it is possible to reduce the impact of tourism infrastructure development in a national park

through careful planning that blends with the environment in order not to debase the aesthetic qualities of the ecology. The model uses the principles of zoning (ROZ Plan) and the evaluation of existing natural features and landscape facets. By marrying the general practice of landscape architecture with the zoning principles the model was used as a pilot to develop the Berg-en-Dal rest camp in the KNP in 1983. Unfortunately Van Riet's (1987) study does not address the need for a comprehensive tourism management plan.

1.6.6 An "implicit" management plan

In a series of interviews with previous KNP tourism managers, scientists and park wardens it has been confirmed that the Park never had a comprehensive tourism study or management plan to balance the imperatives of conservation, financial viability, tourism, community relations and the business community. A similar problem is also experienced by other national parks under the jurisdiction of SANParks. The current tourism service delivery system evolved from passion, dedication and intuition. It has indeed evolved in a *trial and error* fashion[11]

In the researcher's view the development of tourism in the KNP is largely demand-driven. The management approach has been primarily focused on defining the requisite development and necessary resources to operate the Park to the capacity demanded of it rather than relying on prior surveys and impact assessments to define in advance a sustainable tourism policy statement and management plan. Tourist controls were based on subjective evaluation rather than researched ecological evidence, hence the difficulties to monitor and evaluate them against an established criteria.

The proposal for this study was approved by the SANParks Board on the expectations that it will become a template to assist the KNP and other national parks under its jurisdiction to formulate and concretize their integrated tourism management plans. The envisaged template may also be used with adjustments to suit local or regional variations by other reserves and national parks in Africa. This expression of need by the SANParks Board (with motivations from the researcher, scientific services and the tourism department) makes it imperative and compulsive to have a study that can fill this gap that has been growing for the last 75 years since the introduction of tourism in the KNP.

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[11] Interview with Mr Chris Marais (former KNP Tourism Manager) and Mr Joep Stevens (General Manager of Tourism in the KNP), 15 May 2003.

1.7   PROBLEM STATEMENT

The overall problem of the KNP is a lack of an integrated tourism policy statement (management plan) constructed on scientific data to guide and balance delivery of tourism services with conservation objectives. The lack of a tourism management plan and policy leads to different definitions of park tourism, reactive planning to satisfy demands, conflicting objectives of line function departments, poor understanding of tourists' needs, inconsistent standards of service-delivery, poor product quality, financial under-performance, inadequate maintenance of infrastructure, lack of community participation and absence of indicators to measure the impact of tourism services on the environment and tourists. The void of a tourism management plan risks practising unsustainable tourism that could damage the environment, erode the Parks' attractiveness to tourists and greatly curtail the KNP's market advantage in the nature-based tourism sector.

1.8   RESEARCH AIM AND OBJECTIVES

1.8.1   Research aim

The main aim of this study is to formulate an integrated tourism management framework with broad guidelines to identify tourism and recreational values that underpin tourism service delivery in the KNP. The envisaged tourism management framework could be used as a template by the rest of national parks under SANParks and other protected areas in Africa and the world with adjustments to suit their local conditions.

1.8.2   Research objectives

In order to achieve the overall aim of the study the following objectives are proposed:

- to construct and contextualize background information to the research problem, to define the global context in which protected areas are managed and reflect on the type of problems caused by the lack of an integrated tourism management plan (Chapter 1);
- to define sustainable tourism using principles of ecotourism and draw an international comparative analysis on protected area management systems from which the KNP can draw lessons and benchmarks towards a theoretical integrated tourism management framework (Chapter 2);

- to trace the historical overview of tourism development in the KNP and highlight both successes and failures to guide the formulation of the proposed tourism management framework (Chapter 3);

- to conduct surveys to measure tourist demographics; tourists' satisfaction levels; product quality; measure the effect of commercialization and determine tourism and recreational values that influence tourist choice of the KNP as a tourism destination (Chapter 4);

- to measure and analyse community perceptions and attitudes towards nature conservation and the KNP in particular and also to suggest mechanisms to involve communities in managing the KNP (Chapter 5);

- to suggest an integrated tourism management framework with implementation, monitoring and evaluation strategies for the KNP (Chapter 6); and

- to present findings, recommendations and shortcomings of the study and highlight areas for future research (Chapter 7).

Addressing these objectives will lead to an integrated tourism management framework that can be responsive to internal and external challenges and the specific needs of consumers and neighbouring communities. The aim is to design a local and regionally sound tourism management framework that can be user-friendly and serve as a platform to develop guidelines that will be generically valid as scientific standards. Such scientific standards would be areas of future ongoing research outside the scope of this study because modelling of scientific standards, according to the researcher, takes years to produce.

The research design process followed during the study is presented in Figure 1.1.

1.9   DELIMITATION

This study is about tourism management and administration in the KNP. It should not be misconstrued for a natural science research or wildlife sciences project, as this is what many people associate with research in the KNP.   When studying protected area tourism it is impossible to exclude conservation issues, infrastructure, administrative matters, socio-economic issues and the neighbouring as well as resident communities. This study is about bridging the gap between tourism and conservation in protected areas to raise sufficient tangible deliverables for conservation and communities.

FIGURE 1.1:   Research design and presentation

CHAPTER	OBJECTIVES	OUTCOMES
CHAPTER 1	• Background to research problem • Research methodology	• How protected areas are managed • Lack of tourism management plans • Management problems
CHAPTER 2	• Literature review • Ecotourism/sustainable tourism • Management philosophies • Park tourism practices	• Lessons / benchmarks • Theoretical framework of tourism management plan • Management paradigms
CHAPTER 3	Historical overview of KNP tourism management	• Lack of strategic tourism direction • No tourism management plan • Poor product quality and service standards • Financial underperformance • Lack of criteria to manage impacts • Infrastructure/maintenance problems • Lack of marketing/pricing policy
CHAPTER 4	Empirical research: • Situation analysis • Study visits • Literature study • Surveys • Interviews SWOT analysis on KNP product	• Findings • Interpretation • Discussions and workshop findings (16 and 17 July 2003 with stakeholders)
CHAPTER 5	Community survey	• Communities hold positive views about the KNP and Nature Conservation • No mechanisms for involvement
CHAPTER 6	• Implementation • Monitoring • Evaluation	• Criteria to measure success and failures • Levels of acceptable change • Adjustment of management
CHAPTER 7	Findings (is the problem solved?)	• Recommendations • Shortcomings of the study • Future research areas

1.10   DESCRIPTION OF THE STUDY AREA

The KNP of today had its origins in the 1898 proclamation of the Sabie Game Reserve, a slice of land between the Crocodile and Sabie Rivers. In 1903 the Singwitsi (Shingwedzi) Game Reserve was proclaimed and with subsequent additions and border refinements this entire area was proclaimed as the KNP in 1926. Although there were wildlife reserves proclaimed much earlier in the Transvaal, Cape and Natal, the KNP is the oldest national park in Africa (Mabunda *et al.*, 2003).

The KNP is renowned for its unparalleled wildlife management in the African continent, its diversity of animal species and its variety of vegetation zones. It covers an area of 1 948 528 hectares (19 455 km^2) and lies between 22° 25' and 25° 32' latitude South and between 30° 50' and 32° 2' longitude East. Close on half of the KNP falls within the Limpopo Province and the remaining half in Mpumalanga, the western boundary of the park being a rather arbitrary line across the two provinces (see Figure 1.2). The Lebombo Mountains form the eastern border between the KNP and Mozambique. The Limpopo River forms its northern boundary with Zimbabwe whilst the Crocodile River is its southern limit. The KNP boasts a road network of approximately 7 528 km, comprised of 885 km bitumen and 1 743 km gravel tourist roads and an additional 4 900 km gravel firebreak roads (Schutze, 2002). In geographical size the KNP is equivalent to the state of Massachusetts in the USA, Wales in England and Israel in the Middle East.

The KNP is part of the newly proclaimed Great Limpopo Transfrontier Park (GLTP), which includes the newly established Limpopo National Park in Mozambique (formerly Coudata 16) and Gonarezhou in Zimbabwe (Sandwith & Pfotenhauer, 2002). This linkage creates a massive 38 000 km^2 mega-park where wildlife and tourists will be able to move from one country to another unrestricted by physical and political barriers (SANParks, 2002). The socio-economic spin-offs of this mega-park will be, *inter alia,* the realization of increased revenue for conservation, job creation and the revival of the regional economy after years of a devastating civil war in Mozambique and political crisis in Zimbabwe that has led to social and economic instability resulting in a total collapse of the economy. The Great Limpopo Transfrontier Park is not the focus study area in this project and is merely mentioned to illustrate another paradigm shift in protected area management approach[12].

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[12] In terms of the Great Limpopo Transfrontier Park Treaty signed by the Presidents of South Africa, Mozambique and Zimbabwe, each country retains its sovereignty and statutory obligations in managing parts of the transfrontier park in their territories. The parks (KNP, Gonarezouh and Limpopo) retain their unique tourism, wildlife and community involvement management systems. The Joint Management Board governing the transfrontier park is limited to managing cross-border issues such as disease control, animal migration, immigration and other issues.

FIGURE 1.2: Map of the RSA showing the KNP

1.11 CHOICE OF RESEARCH METHODOLOGY

1.11.1 Is tourism a field for schorlarly inquiry?

The level of scholarship in tourism management has begun to reflect the industry's prominence in the global economic systems and its significance as an agent of social, cultural and environmental change. There has been a traditional view held within the mainstream academic world that tourism studies do not constitute a "serious" field of scholarly enquiry because it lacks theoretical and scientific rigour (Parnwell, 1999). Certainly at SANParks this view is still shared by many natural science researchers although a few individuals among them are becoming interested in tourism research. A few of their works are cited in this study (Braack, 1997a; Venter *et al.*, 1997; Freitag & Biggs, 1998; Novellie *et al.*, 1999; Venter, 2001; Biggs; 2003, Biggs & Rodgers, 2003).

There is a dearth of comprehensive applied tourism research that focuses on the relationship between tourism and conservation, especially in national parks and nature reserves in South Africa and in the rest of the world (Parnwell, 1999). There is an assumption that national parks and nature reserves are a recreational resource and therefore not necessarily in need of tourism research (Page, 2002). Notable exceptions do occur in countries like New Zealand, Australia, Canada and the USA. New Zealand and Australia are probably world leaders in this regard (Eagles *et al.*, 2002).

Although numerous studies of the evolution of national parks exist, the wider analysis, interconnections and transformations that have occurred as a result of tourism activities in protected areas are notably absent from the mainstream tourism literature (Page, 2002). The choice and subsequent success of a research method in tourism studies is largely determined by the area of study, the nature of the topic chosen by the researcher and available resources.

For purposes of this study the researcher used both quantitative and qualitative research methods and a combination of document search and case study methods. This was decided because tourism focuses on phenomena that occur in a real world setting and also because it involves studying tourism in all its complex dimensions. Statistics on their own are unable to convey the emotions and feelings of real world experiences and phenomena to such an extent that the findings of a study might appear to be inconclusive (Leedy & Ormrod, 2001).

1.11.2 Surveys used

Three questionnaires and 60 value-laddering interviews were conducted to measure quantitative and qualitative data on tourist demographics, different quality aspects of the KNP tourism product, tourist opinion on commercialization, personal values that influence tourists' choices of the KNP as a holiday destination and the attitudes of neighbouring communities towards the KNP. The surveys, statistical analysis methods used and results are discussed in detail in Chapters 4 and 5, respectively. It was imperative to use more than one method to triangulate the study for the reason following hereunder.

1.11.3 Triangulation

Triangulation is a term that originally refers to surveying of land with the aid of trigonometry (Bruinsma & Zwanenburg, 1992). Its aim is to study the object of research in at least two ways or more. With the aid of triangulation one can endeavour to achieve objectivity, reliability and

validity in both quantitative and qualitative research (Babbie & Motoun, 2001). Eight types of triangulation techniques were applied in this study.

In **data triangulation** two or more kinds of data sources were used, for example interview data and dossiers. In **method triangulation** two or more research methods were applied, for example two or more data-collection methods such as the questionnaire, interviews, literature study or two or more data analysis methods such as analysis of variance (ANOVA) or classical content analysis (Tredoux & Durrheim, 2002). In **researcher triangulation** the researcher collaborated with other researchers in this study. **Theoretical triangulation** involved elucidating research material starting from different ideas, assumptions, hypotheses and interpretation to see where the data fits in. In **mental triangulation** the researcher endeavoured to establish different ways of thinking and effective relations with regard to the research object. Finally, **multiple triangulation** refers to a situation when more than one form of triangulation was applied in this research study.

Triangulation played an important role in enhancing the reliability and validity of this study. Qualitative research is often blamed for lacking the tenets of 'good' science (Decrop, 1999). In this study, basic criteria to assess the trustworthiness of the qualitative and quantitative approaches were applied. Refining the concepts of corroboration and validation, triangulation strengthens findings by showing that several independent sources converge on them, or at least do not oppose them (Decrop, 1999).

The majority of tourism studies are conducted at one point in time, thereby ignoring the effects of social change and process. **Time triangulation** can go some way in rectifying possible omissions by using cross-sectional and longitudinal approaches (Decrop, 1999; Goddard & Melville, 2001). Tourism in the KNP has undergone an evolution over time due to the influence of internal and external environments. Certain decisions such as to invite private donors to invest in more accommodation units, the introduction of night-drive safaris, outsourcing of shops and restaurants and the allocation of concession areas for the establishment of luxury private lodges were taken in certain contexts. It may happen that such decisions, perceived as correct at the time of their adoption, may now appear as ill conceived when viewed out of context.

A study without this perspective may not make sense to a reader who has no prior knowledge of the KNP. Likewise **space triangulation** was used to overcome the limitation of tourism studies conducted within one culture or subculture. The complex nature of tourism in national parks is best approached from various angles and the multi-method approach of triangulation

was ideal for this purpose. It was important for the researcher to remain objective regardless of his involvement in current SANParks activities (see 1.11.4 below).

1.11.4 Flexibility of the researcher

A researcher's background and position can affect what he chooses to investigate, the angle of investigation, the chosen research method, the findings considered most appropriate and the framing and communication of conclusions. Contemporary theory of knowledge acknowledges the effect of a researcher's position and perspectives, and disputes the notion of a neutral observer (Nagel, 1986).

At the time of this research study, the researcher as Head of the KNP, was presiding over the process of transformation. It is hereby acknowledged that there is a possibility of preconceptions about what park tourism should be about. Preconceptions are not the same as bias and these were avoided by stating them forthright and looking at data, or its interpretation for competing conclusions. There was a continuous questioning of the hypotheses rather than taking them as *a fait accompli*.

1.11.5 Transferability of the study's findings

The aim of research is to produce information that can be shared and applied beyond the study setting. Few studies, irrespective of the method used, can provide findings that are universally transferable. Presentation of contextual background material, such as demographics and study settings, is necessary if the reader is to be able to ascertain to which situations the findings might provide valid information. Research findings are not supposed to be valid for population groups in general (Goddard & Melville, 2001).

Undiscriminating comparison of park tourism in KNP with sub-Saharan Africa draws limited parallels and relevance because of the variations in local philosophies of park tourism, interpretations, legal foundations of protected areas, available resources, politics, social and economic factors. African countries face different individual challenges at any given time. Accordingly, within the four regions of the KNP (South, Central, North and Far North), there might exist different conditions that influence tourism service-delivery.

A comparison between tourism in KNP and in countries in the northern hemisphere with the hope of drawing perfect matches is not realistic either. People in the northern hemisphere have different views of wildlife management and park tourism compared to those in the

southern hemisphere. Northerners view their wildlife more on television and movie screens than *in situ*-situations. In contrast, poor peasant farmers preoccupied with economic survival form the bulk of people living in the southern hemisphere. Many have lost crops and loved ones to wild animals but they also depend on animals and medicinal plants for their food and health. They see wildlife as an integral part of their lives to be controlled by local communities and used in a dynamic and adaptive fashion. Conservationists in the north see it as a series of entities to be segregated and protected in some form of "ecological apartheid" and controlled by centralized bureaucracies (Crowe, 1995).

The purpose of the comparative analysis of international protected area management systems in Chapter 2 is to draw broad lessons to guide the process of developing a KNP tourism management framework but it is not intended for exact replication. Whatever the findings are, it is not always possible to replicate them in different settings.

1.11.6 Interpretation and analysis of research data

The interpretation and analysis process involved an interactive, creative and intuitive examination of the data, all in search for patterns, themes, or emerging insights, each unfolding from the research process and grounded in the data. A thoroughly prepared, rigorously researched and documented analysis is what distinguishes scientific approach from superficial conjecture (Erlandson *et al.*, 1993). Collected data was disassembled and reassembled to find uniqueness in pattern or principle of process or behaviour. Data were subsequently coded, where possible, so that it could be traced back to the interview (via transcript) or document or observation for purposes of a conformability audit to verify the process and research method. The data were analysed and synthesized through a developmental process, continually evolving and emerging through constant comparison of newly acquired data with previously acquired materials.

The theoretical framework played the role of *reading glasses* in this study to enhance its scientific quality. The adaptive management approach principles (see 2.4.1) and the IUCN evaluation frameworks for protected area management effectiveness and provisions (see 2.7.1) of the new National Environment Management: Protected Areas Act, 2003 (see 2.8) were used to draw comparisons with empirical findings to support interpretations.

1.12   LIMITATIONS OF THE STUDY

There is a dearth of social research within protected areas in South Africa. This research gap in park tourism is one of the major difficulties that the researcher encountered during this study. South African academics in conservation and tourism research have not yet paid much attention to the conservation-tourism inter-phase area and there are very few, if any, South African publications in this regard.

South African provincial conservation agencies were reluctant to release financial and statistical information to the researcher for undisclosed reasons. It could be that they were concerned about such information being published in a thesis or that they do not centrally collate their data.

The study's duration was too short to produce a comprehensive picture of tourism seasons experienced by the KNP. Continuous research over five to ten years might establish a pattern or trend of tourism practice and allow adjustments based on research data to be effected (adaptive management principles). This study zoomed in at a particular point in time and continuous research thereafter would be of utmost importance. There is a need to conduct short-term studies on every aspect of park tourism to ultimately establish a tourism research base line.

1.13   SCOPE OF THE STUDY

The thesis will consist of the following chapters:

Chapter 1

This chapter introduces the study setting, background to the research problem, research objectives, motivation for the study and limitations. It outlines the design of the research methodologies and processes to be followed and contextualizes the lack of tourism management plans and related problems in the protected area management system.

Chapter 2

Chapter 2 reviews relevant literature and defines the type of tourism that the KNP practices. It also draws a comparative analysis of international examples of park tourism and protected area management from which the KNP could derive lessons for designing its own tourism management framework. Shortcomings are identified for this research study to address.

Chapter 3

In this chapter the historical overview and management structure of both SANParks and the KNP, are dealt with. It also views tourism growth in the KNP with highlights on successes and failures to assist this study in formulating a tourism management framework that will eventually improve the current situation.

Chapter 4

The focus of this chapter is on the KNP tourism facility, views on commercialization, tourist demographics and service-delivery. It deals with the processing of data collected from observations, questionnaires and interviews using SPSS Windows. Data is analysed and processed and eventually interpreted. Each survey ends with findings and discussions of the processed data presented in tables, graphs, charts and qualitative comments.

Chapter 5

In this chapter the attitudes, perceptions and views of the neighbouring communities are measured in a separate survey and findings presented.

Chapter 6

The chapter suggests an integrated tourism management framework, consisting of tourism and recreational values that must be managed to achieve a sustainable tourism system. It also suggests implementation, monitoring and evaluation plans in the application of the management framework.

Chapter 7

The results, recommendations and shortcomings of the study are presented in this chapter. Further areas of research at post-study level are suggested.

1.14   CONCLUSION

In summary, this study:
- reviews the current tourism shortfalls which have arisen from historic reasons within the KNP;
- compares tourism practice within the KNP and the international context as examples of leading international tourism destinations;
- critically analyses the findings of questionnaire and interview-based surveys in the KNP and adjoining areas to derive an integrated tourism management framework

which should refine tourism practice in a manner more relevant to the demands and expectations of modern society;

- designs an integrated tourism management framework, an implementation strategy and control mechanisms; and

- suggests a continuous process of adaptive management approach to improve the management framework as circumstances evolve in KNP, tourism markets and the international world.

The next chapter gives an exposition of tourism trends and an international comparative analysis of tourism in protected areas.

CHAPTER 2

TOWARDS A THEORETICAL FRAMEWORK IN FORMULATING AN INTEGRATED TOURISM MANAGEMENT FRAMEWORK

The objective of this chapter is to give an exposition and perspective of protected area tourism practice and to draw a comparative analysis of international systems in order to glean lessons that can be applied when formulating an integrated tourism management framework for the KNP. At the end of this chapter a theoretical management framework, underpinned by legal requirements of the Protected Areas Bill, 2003, adaptive management principles and the IUCN evaluation framework, is suggested.

For purposes of this study the term "tourism" has been used to describe tourism activities in the KNP within the sustainable development framework.

2.1   TOURISM PRACTICE IN NATIONAL PARKS

An array of arguments exists about the type, level and extent of tourism that a national park should offer as a product and still ensure that tourists do not destroy the ecological integrity of the resource (Prosser, 1994). One dominant argument is that national parks should practice *ecotourism* as opposed to *mass tourism*[13].

This argument is embedded in the earlier definitions of national parks as illustrated in Chapter 1 and Annexure 1. National Parks (like the KNP) were established primarily to preserve some type of biophysical process or condition such as a wildlife population, habitat, ecosystems, natural landscape or cultural heritage such as a community's cultural tradition (Ceballos-Lascurain, 1996). Tourists visit national parks to understand and appreciate the values for which the areas were established and to gain personal benefits. The number of people taking part in nature-based tourism is growing and the tourism industry has responded to this range of interests by developing many types of niche market packages (Eagles *et al.,* 2002). The process of designing an integrated tourism management plan capable of meeting the expectations of this growing industry can be greatly facilitated by clarity regarding the type of

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[13] Mass tourism refers to holiday packages sold en masse to millions of people without consideration for the carrying capacities, norms, culture and environment of host destinations. It is often associated with environmental degradation and there is a firm belief that practising ecotourism principles in such areas can alleviate the problem and lead to sustainable tourism (Holden, 2000).

tourism that is suitable for national parks and the KNP in particular, and ecotourism is seen as a form of sustainable tourism practice that can meet the expectations.

2.2   INCORPORATING ECOTOURISM PRINCIPLES IN NATIONAL PARKS

Although this research study is not focusing on ecotourism, it is imperative to adopt the principles of this new field and incorporate them into protected area tourism to ensure sustainability of the park's tourism. The prefix "*eco*" to tourism originates from a Greek word "*oikos*" meaning house or habitat. Over the years it has evolved to become synonymous with ecology (Wearing & Neil, 2000). The environment which humankind inhabits is fundamentally his home, dwelling or life-supporting system. Despite the "fashion" the origins of ecotourism are deeply rooted in the philosophical heritage embraced by environmentalists and conservationists (Ziffer, 1989). For the purpose of this study ecotourism is defined as a multi-dimensional philosophy embracing experiential and educational elements that benefit the community.

Numerous definitions[14] of ecotourism exist today. None of the definitions are universally accepted (Litvin, 1996), which reflects the developmental stage of ecotourism as a science. Current definitions and interpretations of ecotourism lead to confusion rather than to an understanding of what ecotourism is.

Ecotourism evolved in reaction to the rapid destruction of the world's natural habitats that were considered to be vital reservoirs of biodiversity (Lindberg *et al.*, 1998). Ecotourism was seen as a viable alternative to logging, oil drilling, mining and other extractive industries. In Africa, ecotourism unfolded as an alternative to a failed colonialist philosophy of wildlife management based on separating people from protected areas (Mfunda, 1998). Faced with rampant poaching activities, some scientists and park managers argued that wildlife would only survive if those living on the park's borders enjoyed some kind of reasonable benefits from wildlife conservation and tourism (Matawonyika, 1989). It is therefore accurate to say ecotourism was the world's acknowledgement of and reaction to sustainable practices in global ecological practices (Diamantis, 1999).

The researcher concurs with the view of Diamantis' (1999) that ecotourism should make tourism practitioners move towards sustainable practices in ecological management.

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[14] In an attempt to streamline the many confusing definitions, the IUCN has endorsed Ceballos-Lascurain's (1987:14) definition of ecotourism as "travel to relatively undisturbed or uncontaminated natural areas with the specific objective of studying, admiring and enjoying the scenery and its wild plants and animals, as well as any existing cultural manifestations (both past and present) found in these areas".

Ecotourism, in other words, should be coherent with the notion of sustainable tourism by adhering to the carrying capacities of the destination, scientific auditing of tourism impacts on the environment and being acceptable to, and supportive of the host communities. A brief description of sustainable tourism follows.

2.3   SUSTAINABLE TOURISM

Earlier reference in this study linked tourism to sustainable development and the relationship between the two concepts. It is imperative to define and understand sustainable tourism in the context of sustainable development as an approach of this study. Because of its development dimension, tourism finds itself in the middle of the sustainable development debate. The Brundtland Report (WCED, 1987) championed the concept of sustainable development and defined it as *"development that meets the needs of the present without compromising the ability of future generations to meet their own needs".* The earth's resources are not unlimited and over-consumption or over-exploitation may lead to the depletion of the resources, thus putting the survival chances of future generations in jeopardy (Swarbrooke, 1999).

The Brundtland Report did not make any noteworthy reference to tourism but its influence has resulted in increasing awareness of and concern about the continuing degradation of the environment and the role that tourism plays in the equation of environmental exploitation. With this increase in awareness the link between sustainable development and tourism has become a reality (Diggines, 1998).

Given the global environmental crises emanating from a variety of reasons including over-exploitation of natural resources in the world, particularly in developing countries, it is essential that all forms of tourism based on natural or man-made resources contribute to the sustainable use of resources (UNEP, 2002). The target of sustainable tourism should be balanced tourism where no one element predominates (Muller, 1994). Sustainable tourism is a form of planning and management whereby tourism is viewed in a holistic manner and different interests such as ecological, financial, community and tourists satisfaction are addressed (Swarbrooke, 1999). Tourist satisfaction is regarded by Yuksel *et al.,* (1999) as the most important goal of sustainable tourism to be considered when a tourism management framework is designed.

While the current tourism product in KNP may in certain instances be compatible with the principles of sustainable development there are issues that are contrary to the definition of the concept. The tourism planning process in the KNP does not involve various role-players such

as the tourism industry, marketers, communities and tourism practitioners. In fact, planning is based on budgeting without a proper analysis of the situation and the changing market needs. Current business plans of both KNP and Head Office are not based on any tourism policy management plans.

When a management plan for tourism is designed, it may be appropriate to answer the following questions:

- how can one best understand the conditions in which tourism operates;
- what goals should be attained;
- what actions should be taken to achieve the goals;
- how can success and the extent to which actions taken have brought about change be measured;
- what must be done to achieve management effectiveness in future;
- how can acquired knowledge be captured to prevent the same mistakes from happening in future; and
- how can acquired knowledge be shared with other practitioners (Salafsky & Margolius, 2001)

To provide answers to the above questions will be to begin the process of adaptive management[15] and to provide a management philosophy for tourism. Tourism has many spatial and temporal elements that need to be harnessed into a management approach to address its development in a dynamic environment. Adaptive management is widely used in ecosystem management and can be applied to tourism management with minor adjustments to suit the nature of tourism. The next section describes in detail the adaptive management approach in the context of sustainable tourism management in protected areas.

2.4   ADAPTIVE MANAGEMENT AND TOURISM

2.4.1   Adaptive management in the context of sustainable tourism

The adaptive management philosophy is a relatively new phenomenon or concept and has begun gaining popularity in the mainstream conservation community. Its roots are found in many disciplines such as science, philosophy, social science, business management, professional practice and, recently, ecosystem management. Salafsky *et al.*, (2001:12) defines adaptive management as management that: "… *incorporates research into conservation*

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[15] Adaptive management is a management approach that places emphasis on strong goal setting, integration of design, management and systematic monitoring in order to adapt and learn (Salafsky *et al.*, 2001:12).

action. Specifically it is the integration of design, management and monitoring to systematically test assumptions in order to adapt and learn".

Adaptive management is meant to be a process of defining actions, decision-making and learning in which an organization or group responsible for sustainable tourism of a particular park is responsive to biophysical and social changes and is able to respond quickly and appropriately to such changes (Salafsky & Margoluis, 1999b). In order to make sound management decisions under complex and evolving tourism conditions an organization must be able to:

- continuously test assumptions and hypotheses;
- experiment with alternative approaches to resolve problems and address pertinent issues;
- generate, analyse and use relevant and reliable data and information;
- determine the impacts of its chosen course of action; and
- learn from failure as well as from success and apply such lessons to future programme decisions (Margolius & Salafsky, 2001).

An organization's ability to understand and react to the complex and dynamic ecological and social environment at a given environment is a major determinant of its success (Noble, 1999). In order to meet the challenge of understanding this complexity and making appropriate programme decisions, organizations must be able to obtain, process and use appropriate information. Adaptive management is fundamentally a framework for systematic analysis and learning. Salafsky *et al.,* (2001) identify three cardinal elements of adaptive management that should be observed when using the methodology. These include testing assumptions, adaptation and learning.

- **Testing assumptions** is about systematically trying different interventions to achieve a desired outcome (as opposed to sticking to one plan for 10-20 years).

- **Adaptation** deals systematically with using information obtained through monitoring to take action to improve a programme (as opposed to guesswork and intuition).

- **Learning** is about systematically documenting programme processes and results so that lessons can be integrated into institution-level decision-making and shared with broader practitioner and academic communities (Holling, 1978).

Several conditions that warrant the use of an adaptive management approach have been identified:

- **Complex systems:** Tourism is influenced by geographical factors such as climate, weather, winds, currents and soil; ecological factors; social factors like culture, demographic family structures and religion; political factors such as types of government and policy towards tourism. There are also economic factors like cash needs, employment opportunities, exchange rates and markets, and there are random factors like disease (e.g. SARS), economic crashes or disasters that can cause instability (Gunderson *et al.*, 1995) e.g. September 11.

- **Unpredictable change:** This is changes in market expectations, political systems and human hopes. Not all change is linear and predictable. The possibility of sudden change makes adaptability an essential element of tourism (Margolius & Salafsky, 1998).

- **Competition:** It is important to stay one step ahead of competitors. Commercial developers are finding ways to get around zoning laws. Expensive advertising is being used to influence public opinion. Organizations that are most strategic and can adapt the best and most efficiently have the greatest chance of thriving and staying ahead of competition (Salafsky & Margolius, 1999a). Tourism is one industry where an organization must conduct business intelligence and stay one step ahead of the pack to survive (Salafsky & Margolius, 1999b).

- **Immediate action:** Despite the constantly and unpredictably changing world and incomplete information, especially in tourism, efforts to gain more knowledge should not stop. Life will not stop and immediate remedial action is necessary (Salafsky & Margolius, 1999a; 1999b).

- **Incomplete information**. The task of measuring and fully understanding the tourism phenomenon at a given site is difficult, if not impossible. Information on natural, human, social, political and economic resources is rarely complete. As a result, complete knowledge cannot be a necessary precondition to design and implement sustainable tourism policies. Important knowledge gaps should be identified and addressed early in the tourism plan project in order to make the best decisions (Gunderson *et al.*, 1995).

- **Learning and improvement**. The degree of continuing change and habitat alteration indicates how human beings have improved their subsistence. The challenge is to stimulate novelty, build in flexibility, adaptability and learning to help manage sustainable tourism. Success will ultimately only happen when protected area

managers can learn and improve their tourism management efforts (Margolius & Salafsky, 1998).

The Scientific Research Section of the KNP already implements a unique version of adaptive ecosystem management based on recent developments in ecology and business management. New paradigms in ecology stress complex adaptive systems and heterogeneity, and business management now emphasizes that organizations need to continually re-invent themselves. The Research Section's strategic adaptive management, the new name of the programme, places emphasis on the forward-looking component rather than a reactive mode. It has a strong goal-setting component evidenced by a well-developed objectives hierarchy and strongly articulated monitoring end-points called Thresholds of Potential Concerns or TPCs (Biggs & Rodgers, 2003). TPCs are defined as upper and lower levels along a continuum of change in selected environmental indicators. They act as hypotheses of acceptable limits of change in the ecosystem structure (Biggs & Rodgers, 2003). Unfortunately, this management approach is designed and applied to biodiversity conservation only and not to tourism management or park administration as a whole, one of the objectives that this study suggests should be targeted.

2.4.2   Adaptive management cycle

In order to be able to implement the principles of adaptive management it is imperative to understand how the management cycle of this model works.

- The starting point of the cycle of adaptive management involves determining what the overall tourism **mission** is.

- Once this is clear, **Step A** involves assessing the conditions and determining the major threats to tourism at the project site. Using a **conceptual model** the project team defines the conditions and relationships between key factors at their disposal.

- **Step B** involves using this model to develop a **project management plan** that outlines the results that the project team would like to accomplish and the specific actions that the team will undertake to achieve the intended results.

- **Step C** involves developing a **monitoring plan** for assessing progress in implementing the project.

- **Step D** involves **implementing actions** and the monitoring plan.

- **Step E** involves **analysing data** collected during the monitoring effort and communicating the information obtained from the project to appropriate audiences.

- Finally the project team uses the results of this analysis to **change the project** and learn how to do it better in future.

- Based on feedback information, the project team may want to **modify** the conceptual model, management framework or monitoring plan (see Figure 2.1).

FIGURE 2.1: Adaptive management cycle
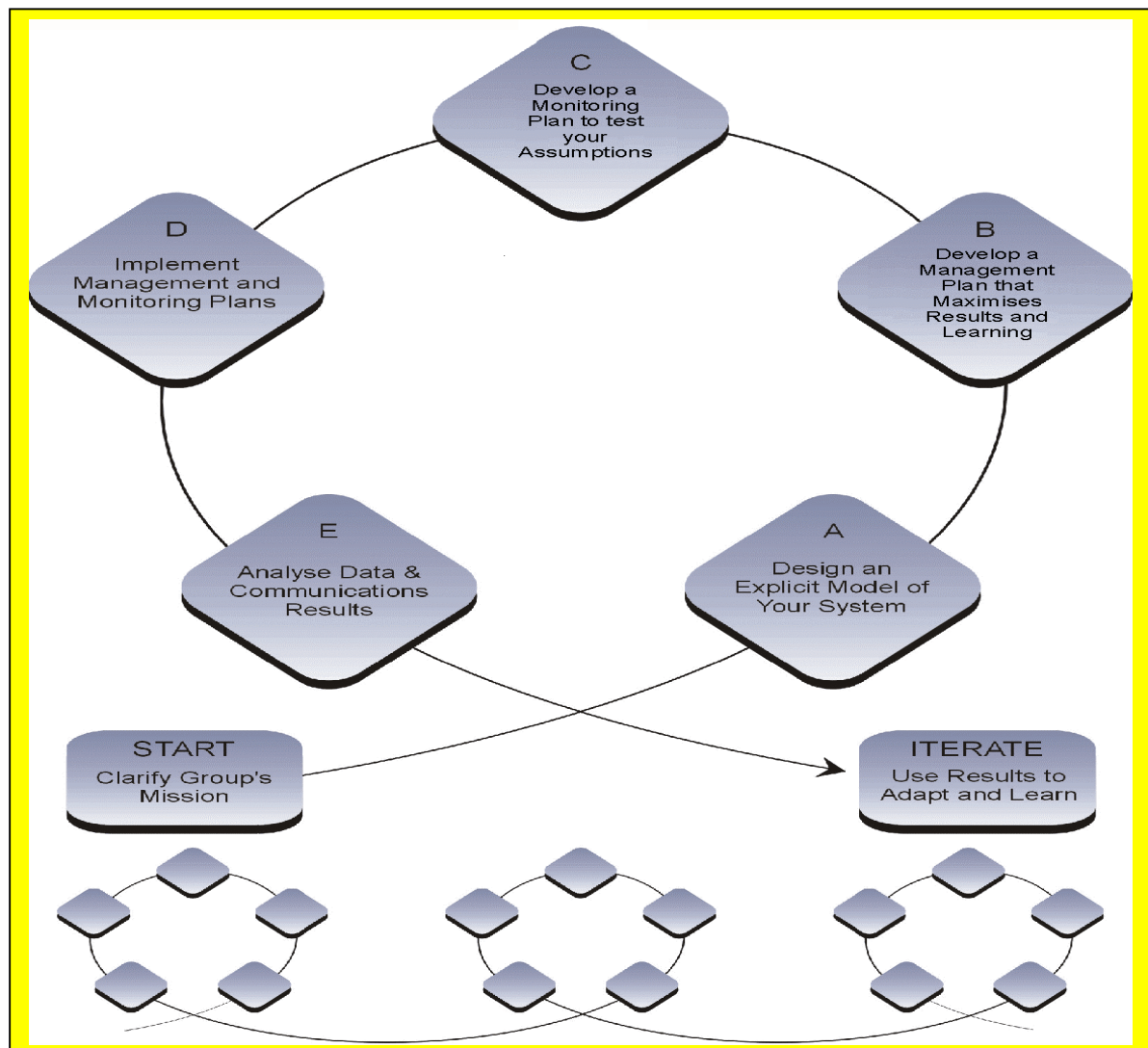
Adapted from Salafsky *et al.*, 2001:34

2.4.3   Adaptive management as a tourism management philosophy

Tourism manifests all the characteristics of ecosystems management. Tourism resources in protected areas are both consumptive and non-consumptive. They consist of both natural and

highly developed tourism landscapes (Berkes & Folke, 1998). The list includes, *inter alia,* the atmosphere, water resources, wildlife, landscapes, people, local cultures, shops, banks, medical facilities, roads and accommodation units (Healy, 1994). The quality and quantity of these constituent resources change due to tourist use or because protected area managers change them to achieve certain outcomes (Selsky & Memon, 2001). After being subjected to an imperceptible evolution and changes on a continuous basis the tourism resources undergo transformations. Like natural resources, tourism resources are also heterogeneous and variable (Hunter, 1997). Their elements intermingle within space and over time when used as a tourist experience. Within the continuum of tourist experience uses there exist multiple, overlapping and potentially conflicting uses and user groups (Selsky & Memon, 2001). Tourism resources possess characteristics of common pool resource elements and public goods constituting a diversified and tightly connected resource base that is indispensable for the integrity of the tourist experience (Bromly, 1991; Holling *et al.*, 1998; Ostrom *et al.*, 1999).

Tourism, like all activities, modifies the quality and quantity of the natural environment, yet its impacts on both the environment and socio-cultural resources are difficult to disentangle and analyse (Briassoulis, 2000). The diversity of protected area tourism activities requires the adoption of an adaptive resource management approach. The adaptive management paradigm could underpin the development of tourism management options (Berkes & Folke, 1998, Holling *et al.*, 1998). Adaptive management embraces wide participation, indigenous knowledge, continuous monitoring, flexible policy design and frequent review of management practices (see adaptive tourism management process in Figure 6.1). This process accommodates dynamic change and uncertainty in a way no other method does (Berkes & Folke, 1998). It is best suited to address the spatial and temporal variability of the tourism resources to respond efficiently to the inherent uncertainty of current and future demands for and supply of resources, to facilitate trade-offs among multiple and conflicting stakeholder interests (Hunter, 1997).

To underpin the suggested integrated tourism management plan for the KNP, the researcher has adopted the principles of adaptive management as a management philosophy for this study. Possible widespread adoption of an adaptive approach to tourism management will occur once protected area managers are able to acknowledge past mistakes, learn from them and make appropriate adjustments to the current tourism management practices. The following section conducts a comparative analysis of international and local systems of protected area management practices to glean lessons that can help shape the formulation of the KNP tourism management framework. In an attempt to practice sustainable tourism,

adaptive management has triggered a major paradigm shift in global protected area management, as it will be demonstrated in 2.5.

2.5   COMPARATIVE ANALYSIS OF GLOBAL MANAGEMENT APPROACHES

2.5.1   General background

Over 60 000 protected areas have now been established worldwide, covering approximately 12 % percent of the globe (Phillips, 2003a). About 1470 protected areas are national parks of the classic model, while the rest are given a wide variety of other designations, especially those established after 1960. Australia alone has at least 45 different types of protected areas (McNeely *et al.*, 1994; Green & Paine, 1997).

Since their establishment, protected areas have been regarded more as enclaves of species refuge rather than places for recreation, spiritual revival and economic benefits. For reasons embedded in history, protected areas tend to have a strong orientation to environmental protection and they have responded to "people issues" as problems rather than opportunities. People have been treated as clients of a commercial business at best – a "necessary evil" for financial support – or as undesirable interlopers at worst. Protected area managers have tended to underestimate the need for a management approach, informed by science or research, that enhances the relationships between such protected areas and society at large. (McCool *et al.*, 2003). Tourism and communities are some of the "people issues" that protected area managers have mostly ignored or treated with disdain.

2.5.2   Protected area management paradigms

The nature and character of protected areas can be traced to the management paradigms that created them. The paradigms can be categorized into two distinct periods of their evolution:

- the classic paradigm of protected areas (1860-1960s), also known as the Yellowstone model era (Phillips, 2003a); and

- the modern paradigm of protected area management (heralded by the advent of the World Parks Congress on Protected Areas held in Seattle 1962, Yellowstone Grand-Teton 1972, Bali 1982, Caracas 1992 and Durban 2003 and the World Summit on Sustainable Development held in Johannesburg in 2002).

Each of these management paradigms is characterized by overlapping programmes that signalled adaptive management tendencies such as changing attitudes, thoughts and dynamic approaches to the challenges posed by the complex task of managing protected areas.

2.5.3   Classic paradigm

Until the 1960s the climate in which protected areas were set up around the world favoured a top-down and rather exclusive view of protected areas. Large game parks were established without much concern for their impact on local people, socio-economic conditions and the general political climate. This approach fitted well with the autocratic style of colonial administration (especially in Africa). The prevailing view was that government knew best, public opinion was something officials helped to shape and not to be influenced by local people (Phillips, 2003a).

The management emphasis for most of the 20th century, not only in the USA but throughout the Americas, Australia, Africa and Asia, was on creating parks in which people did not hunt, gather, herd, farm, fell trees or even collect medicinal herbs. Wherever governments fully implemented such parks, the results were catastrophic for indigenous people. Many were forced from their indigenous homes and stripped of their possessions and human dignity. People were forced to settle outside of the parks and "*found that the natural resources of their former lands, which constituted the mainstay of their economies, were now off-limits*" (Stevens, 1997:31).

They also found that long-standing customary subsistence resource uses that were critical to physical and cultural survival became criminalized and were discouraged by fences, armed patrols and threats of jail terms and fines. Settlements became "illegal squatting" and traditional resource use became "poaching". In these conditions, *"subsistence practices became clandestine activity and traditional local resource management institutions and other conservation practices were often abandoned in the areas that became managed as protected areas"…* (Stevens, 1997:32-33).

The scientific foundation upon which the selection of protected areas was based was limited. Often the boundaries of protected areas were arbitrarily drawn based on superficial knowledge. More generally the idea of inter- or multi-disciplinary working was in its infancy. The great majority of people working in the area or profession made little effort to build bridges to others employed in related fields. Many classic paradigm protected areas came into being

at a simpler time in a less complex world (Phillips, 2003a). The characteristics of the classic paradigm are summarized in Table 2.1.

TABLE 2.1:   Classic paradigm characteristics

Protected areas of the classic paradigm are:

- planned and managed against the impact of people (except for tourists), and especially to exclude local people;

- managed by central government, or at the very least set up at the instigation of central government,

- financed by the taxpayer;

- set aside for conservation, in the sense that the land (or water) is seen as taken out of productive use,

- managed with little regard for the local community, who are rarely consulted on management intentions and might not even be informed of them;

- managed by natural scientists or natural resource experts alone;

- developed separately – that is planned one by one, in an *ad hoc* manner;

- managed as "islands" – that is managed without regard for the surrounding areas;

- established mainly for scenic protection, with a major emphasis on how things look rather than how natural systems function;

- managed mainly for tourists, whose interests normally prevail over those of local people;

- managed reactively within a short timescale, with little regard for the need to learn from experience;

- about the protection of existing natural and landscape assets – not about the restoration of lost values;

- viewed primarily as a national asset, with national considerations prevailing over local ones;

- viewed exclusively as a national concern, with little or no regard for international obligations; and

- management of protected areas is treated as an essentially technocratic exercise, with little regard for political considerations.

Adapted from Phillips, 2003a

Under the classic paradigm there are many examples of forced removals of indigenous communities to establish protected areas all over the world, e.g. the Masaai from the Serengeti, Tangarire and Manyara, the Ik of Uganda from the Kidepo National Park, the Phoka of Malawi from Myika National Park, about 22 000 people from the Royal Chitwan National Park in Nepal (Stevens, 1997) and the Makuleke in the KNP (Carruthers, 1995). Suffice to say, the classic paradigm sowed deep resentment between protected areas and their associated communities. At the decennial international IUCN congresses on national parks and protected areas in Bali in 1982 and Caracas in 1992, the classic model was challenged with members calling for a new approach to managing relationships between protected areas and indigenous communities (IUCN, 1992).

The classic paradigm has bequeathed to the world a legacy that today raises human rights issues as well as questions about the meaning of wilderness, the goals of conservation and the role of indigenous people in protected area management. When tourists came to parks, they were treated with the same attitude meted out to the evicted indigenous communities. The classic paradigm treated tourism planning as an after-thought in a "patch and seal" approach (McNeely, 1993). The evicted communities were denied opportunities to participate and benefit from the tourism business built on their former indigenous homes. The seed of conflict between conservationists and tourism was planted in the classic model and allowed to spread across the globe. However, by the 1960s things started to change with more and more calls for new or modern approaches in managing protected areas (IUCN, 1992).

2.5.4   Modern paradigm

The modern paradigm in protected area management is still in its infancy stage. It took 100 years for the classic paradigm to entrench itself as an unquestionable dogma of protected area management philosophy worldwide and obviously it will take decades for the emerging modern paradigm to become accepted across the world. The modern paradigm, emerged at the World Parks Congresses at Seattle in 1962, Yellowstone-Grand /Teton National Park in 1972, Bali in 1982, Caracas in 1992 and most recently in Durban 2003. At these congresses the classic paradigm came under heavy criticism and new progressive attitudes began to emerge (IUCN, 1992).

During the 1970s, Raymond Dasmann, a respected ecologist working for the IUCN for a decade, led the campaign that warned that "*protected areas cannot survive as islands surrounded by hostile people who have lost the land that was once their home*" (Dasmann, 1976:166). Pressure was mounting amongst IUCN members to engage in efforts that would rethink the way in which protected areas had been handling matters involving indigenous people, acknowledging that the establishment of protected areas had contributed immensely to the impoverishment of these people. The meetings of the IUCN's General Assembly in Zaire in 1975 and in Switzerland in 1981 called on governments, planners and conservationists to "*take into account the still existing, very large reservoir of traditional knowledge, philosophy and experience within local cultures which must provide a significant basis for the evolution of future management policies and planning actions*" (McNeely & Pitt, 1985:4).

The classic paradigm neglected or ignored historical community systems of natural resource management when it introduced the protected area management systems. Prior to colonial

experience considerable parts of land (and water) were managed as common property, a practice prevalent in indigenous territories and marine areas (Kothari *et al.*, 2000). Many indigenous communities had various types of local resource management systems based on considerable local knowledge and included defining and demarcating use zones, the protection of sacred sites, limitations on harvest amounts, seasons of resource use, customs concerning gathering and hunting, shifting cultivation and the use of fire in managing ecosystems (Stevens, 1997; Kothari *et al.*, 2000; Colchester, 2003).

Traditional leaders like King Shaka set aside a royal game reserve in the Umfolozi district of Zululand in the 1820s to control hunting and trade in wildlife products. Commoners were not allowed to hunt in the game reserve and strict protection was introduced with the extension of proscription to clan totems such as crocodile, lion and elephant that could not be killed[16] (Carruthers, 1995). Species-specific cultural regulations involved taboos on hunting and gathering, restrictions on the basis of gender, age and social standing of the natural resource user and customary laws (primarily orally communicated) to ensure that individual groups followed such practices (Colchester, 2003).

Land-use practices were often carefully crafted to local environmental and ecological conditions e.g. climate, terrain, water and living communities. Such adaptive practices based on local knowledge enabled indigenous peoples to live well and with confidence in diverse and at times difficult environments (Stevens, 1997; Kothari *et al.*, 2000). The colonial powers created national parks and forest departments, based on the mindset of distrust of the colonized and disregard of their indigenous knowledge and capacity to take informed decisions (Kothari *et al.*, 2000). The modern paradigm seeks to reverse the injustices of the past by rekindling relationships that will eventually recognize indigenous conservation knowledge in protected area management.

2.5.5   Influence of World Parks Congress on management of protected areas

Since the 1962 World Parks Congress in Seattle the world's protected area agencies and their respective governments have been meeting under the auspices of the IUCN to discuss strategies and techniques of improving the management of the protected areas of the world (UNEP, 2002). Although more than 12 % of the world's land surface is now in some form of protection (IUCN, 2004) there exist little or no idea of whether management of individual

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[16] In African communities people with the surnames Ndlovu (elephant), Tau (lion) or Ngwenya (crocodile) regard these animals with spiritual attitudes of respect, restraint, awe, humility, care, reciprocity and love. They don't kill or eat them. This practice was one of the cultural conservation methods ignored by colonial conservationists (Stevens, 1997).

protected areas or of whole systems is effective (Hockings & Phillips, 2003). More importantly, the little that is known suggests that many protected areas are being seriously degraded. Many are in danger of losing the very values for which they were originally protected (Hockings *et al.,* 2003a).

Management effectiveness begins with the formulation of a management plan with clear indicators to measure the overall ecosystem health and develop methods of managing global threats on the wider landscape. Adequacy and appropriateness of management examines how management is being undertaken; whether plans are in place, whether staff and funds are sufficient to meet basic needs and whether management meets best practice standards for the region and country (Hockings *et al.*, 2003a).

Furthermore, management effectiveness should assess whether protected areas are achieving their stated aims. Measures include biological elements (such as key species are surviving, recovering or declining), and cultural, social and economic aspects (such as tourism and recreational use and the attitudes of the local communities). To improve management of protected areas, effective management needs to be resilient and adapt to changing circumstances. In response to the call made at the Fourth (Caracas) World Parks Congress to improve management effectiveness, the IUCN formed a Task Force within the World Commission on Protected Areas (WCPA) in 1996 to develop a system for monitoring management effectiveness of protected areas (Hockings *et al.,* 2003b). This aspect is dealt with in detail in 2.7 of this thesis.

The 1992 Caracas Declaration in particular called for new partnerships between "parks and people" and this call heralded a radical shift from the classic management paradigm that had declared protected areas enclaves of *ecological apartheid* to the adoption of policies that are sensitive to people's customs and traditions to safeguard their interests (McNeely, 1993).

In analysing the recommendations of the four previous World Parks Congresses, from Seattle (1962) to Durban (2003) which had immense impact on the evolution of management regimes in protected areas, it is possible to identify critical milestones that influenced the agenda of these decennial congresses:

- the 1972 UN Conference on the Human Environment held in Stockholm could be regarded as the watershed that signalled the end of a colonial period of conservation (classic paradigm) (Eidsvik, 1980);

- the development, around the same time, of the biosphere reserve concept by the United Nations Educational, Scientific and Cultural Organization (UNESCO), with its idea of a core area for strict environment protection, surrounded by buffer and transitional zones and its integration of conservation and development (McNeely, 1993);

- the publication of the World Conservation Strategy in 1980, which expressed new thinking on conservation and its relationship to development (IUCN, 1986);

- the adoption of Agenda 21 and the Convention on Biological Diversity at the 1992 UNCED, held in Rio de Janeiro (McNeely, 1993); and

- the World Summit on Sustainable Development (WSSD), 26th August to 4th September 2002[17] agreed in the main to:

  o halve the number of people that have no access to sanitation by 2015;

  o minimize the harmful effects on health and the environment from the production and use of chemicals by 2020;

  o stop the decline in fish stocks and restore them to sustainable levels by 2015;

  o significantly reduce the loss of biological diversity by 2010;

  o substantially increase the use of renewable energies in global energy consumption;

  o set up a 10 year framework for programmes on sustainable consumption and production;

  o strongly support a world solidarity fund to eradicate poverty; and

  o support African countries to implement food security by 2005[18] (DEAT, 2002).

- the Vth World Parks Congress in Durban, 8 to 17 September 2003, pledged support for active engagement in:

  o promoting protected areas as beneficial assets for sustainable development, biodiversity and wider environmental conservation;

  o including stakeholders in conservation to spread benefits beyond boundaries of protected areas;

  o developing a global system that will focus on closing the gaps in protected areas systems e.g. marine areas, grasslands, plants and fish;

  o improving planning and management to promote effective management of protected areas; and

  o increasing financial support by leveraging resources from public, private and charitable sources for the maintenance of protected areas[19] (IUCN, 2004).

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[17] Department of Environmental Affairs and Tourism, 2002. A Summary of The World Summit on Sustainable Development, Johannesburg, Tyrrell Associates.

[18] WSSD Action Plan encourages the use of ecotourism and sustainable tourism principles.

[19] IUCN 2003. Durban Accord: Our Global Commitment for the People and the Earth's Protected Areas, Draft of 7 September 2003, Vth IUCN World Parks Congress, Durban South Africa, 8-17 September 2003.

The contrast between the classic and the modern paradigms is very striking. There is a continuous search or a revolution that is turning what was heralded 40 years ago as novel in protected area management approaches into an established management approach. The modern paradigm touches on many aspects of the way society operates and how nature functions. Such aspects include scientific understanding, socio-cultural awareness, the acknowledgement of human rights, political developments, general developments in management practices, technological advances and economic forces. Phillips (2003a) describes the main characteristics of the modern paradigm in Table 2.2.

TABLE 2.2:   Modern paradigm characteristics

The modern paradigm characteristics for protected areas are:
- managed with, for and in some cases by local people – that is people are no longer seen as passive recipients of protected area policy but as active partners, even initiators and leaders in some cases;
- managed by many partners, thus different tiers of government, local communities and indigenous groups, the private sector, NGOs and others are all engaged in protected area management – a function of decentralization and devolution which is occurring in many countries;
- managed with social and economic objectives, as well as conservation and recreation;
- financed through a variety of means to supplement – or replace – government subsidy;
- managed by people with a range of skills, especially people-related skills;
- managed to help meet the needs of local people, who are increasingly seen as essential beneficiaries of protected area policies, economically and socially;
- planned as part of national, regional and international systems, with protected areas developed as part of a family of sites. The Convention on Biological Diversity (CBD) makes the development of protected area systems a requirement (Article 8a);
- developed as "networks", that is with strictly protected areas which are buffered and linked by green corridors, and integrated into adjacent land that is managed in a sustainable manner by communities for ecotourism purposes;
- often set up for scientific, economic and cultural reasons – the rationale for the establishment of protected areas therefore becoming too sophisticated;
- managed so that the needs of local people are considered alongside those of tourists;
- managed adaptively in a long-term perspective, with management being a learning process;
- about restoration and rehabilitation as well as protection, so that lost or eroded values can be recovered;
- viewed as a community asset, balancing the idea of national heritage;
- viewed as an international concern and with the management of such areas guided by international responsibilities and duties as well as national and local concerns; and
- selection, planning and management viewed as essentially a political exercise, requiring sensitivity, consultation and astute judgement.

Adapted from Phillips (2003a)

The modern paradigm calls for the re-engineering of protected area management and the re-education of politicians and the public (learning as advocated by the adaptive management approach) so that they understand the modern paradigm of protected area management. It requires the re-orientation of development assistance policies so as to integrate protected areas into poverty alleviation projects and strategies. Bringing about such a revolution has not been easy. There are many people who – for good reasons or bad – do not wish to hear that the values and policies associated with protected area management are now very different from those that prevailed in the past (classic paradigm). There are some officials in the profession who still yearn for the old certainties.

2.5.6   Co-management and partnerships

It is perhaps appropriate that the first bold initiatives toward effective rethinking of the classic model of protected area management came from the country that invented it in the first place. The New Federal National Park Directives of 1987 put increased efforts in motion to address Native American rights and concerns in the USA national parks. According to these regulations Native Americans, when authorized by law or treaty rights, have rights to harvest and collect plants, fish, mammals and birds for traditional subsistence or religious activities. The same regulations encourage the establishment of advisory groups that include Native Americans wherever natural or cultural resource management decisions may affect subsistence activities, sacred sites or other historic resources of Native Americans (Flores *et al.,* 1990; Nabokov & Loendoorf, 2002).

Since the 1992 Caracas Declaration, protected areas that demonstrate the new thinking have been established in many parts of the world. Some are officially designated as conservation areas, wildlife management areas and biosphere reserves. Others, including those in Australia, Canada and Alaska, are national parks that were previously based on the classic paradigm (Davey & Phillips, 1998). Included in this new wave of paradigm shift in protected area management is the new phenomenon of Transfrontier Conservation Areas (TFCA), where two or more conservation areas previously divided by political and physical boundaries are joined together as a contiguous ecological conservation unit with no barriers (McNeely *et al.,* 1994). New alliances and co-management approaches are making a bold appearance in protected area management and these changes require more innovative and an open management style than the previously closed and rigid classic paradigm thinking.

 A few examples of these emerging management regimes and how they manage tourism will now be dealt with.

2.5.7   Tourism management in Australian protected areas

The case of Australia provides a fresh perspective on the modern paradigm of tourism management in protected areas. Tourism is an important foreign exchange earner for Australia and of major economic importance for that country. Much of it occurs in areas of high natural and cultural value. Aboriginal communities owning protected area land look to ecotourism as a way to achieve economic independence. At Kakadu National Park entrance fees contribute income to the community. In 1992, the Mutitjulu community at Uluru-Kata Tjuta National Park earned more than US$500 000 from gate takings alone (Uluru Board of Management & Parks Australia, 2000). The community has ultimate say over tourist access to sacred sites, Aboriginal living areas, ceremonial areas or hunting areas. The general policy of these national parks is to educate the public regarding cultural reasons for restricted access or closure of certain parts of a park. This approach is valuable in that it not only helps overcome negative reaction toward regulations but also helps to promote the concept that the park is a living cultural landscape (Altman & Allen, 1992).

The Aborigines own tourism infrastructure such as hotels, roadhouses and tour companies. For example, at Kakadu National Park, the Gagudju community association owns and manages a large resort inside the park along with one of the most successful tour companies in the area. On the other hand, communities are concerned about uncontrollable tourist activities. Tourism can compete directly with subsistence activities. For public relations and safety reasons, Aboriginal rangers educate the public on hunting and gathering and the need for regulations (Johnstone, 1991; Kakadu Board of Management & Parks Australia, 1998).

Balancing the needs of the tourism industry, park tourists and specialist recreation groups with the needs of indigenous inhabitants is a major juggling act for the protected area manager. Policies that protect cultural values and the privacy of individuals, yet at the same time catering for one of the biggest industries in Australia, tourism, are in place and working quite well. Measures are being taken to protect not only the indigenous culture and ecology of protected areas, but also the interests of tourists through effective and responsible interventions. Effective management of the ecological characteristics of protected areas in Australia relies on interaction of traditional ecological knowledge and scientific knowledge (see 2.5.4). There is a belief among the Australians that contemporary protected area management cannot succeed in maintaining biodiversity "... *without an understanding of traditional management methods that were in place before European settlement*" (Lewis, 1992:21).

Employment opportunities for Aboriginal people living in communities distant from centres of industry and commerce are few – conservation land management being one of the fewest. Affirmative Action policies adopted by some Australian conservation agencies have led to increased Aboriginal employment and training in many protected areas. A cross-departmental strategy has led to the establishment of a 30 % Aboriginal employment target by the conservation authorities for Uluru and Kakadu national parks. Unfortunately for Aboriginal people with ties to protected areas, such strategies have not been adopted to the same extent by state conservation agencies. The commonwealth Aboriginal Employment Development Programme in nature conservation management has been established to tackle this problem and results are encouraging (Barry, 1995).

There are many common factors between the Australian and South African histories of protected area evolution. Both systems were previously discriminatory and denied indigenous sections of their populations the right to participate in the management and enjoyment of their respective natural heritage systems. However in Australia the awakening came much earlier and today the protected area management system embraces indigenous people, their culture and knowledge. The Australian system holds valuable lessons for the protected areas of the world in general and South Africa in particular concerning the integration of indigenous communities into protected area management systems or what is better known as Community Based Conservation Management.

The main lesson is the direct involvement of indigenous communities in the management of protected areas and the use of indigenous knowledge. Recently there has been a strong inclination towards commercializing non-core functions by managers of protected areas as a result of the need to raise sufficient revenue and to concentrate on the park's core-business, biodiversity conservation.

2.5.8 Commercialization at Yellowstone National Park (YNP)

2.5.8.1 Origins

The dilemma of attaining financial viability has been with protected areas since their inception all over the world (James, 1999). As a result of their inability to mobilize sufficient financial resources, many conservation agencies worldwide are unable to deliver adequately on their conservation mandates (Littlejohn, 1996). Many are seeking better strategies to optimize returns from their tourism and commercial operations (Bath, 1994). Although it was difficult at the beginning, YNP seems to have lived up to its tradition of being a torchbearer in the

management of wild lands on business principles and practices by designing a system that has now become known as "commercialization". The practice of outsourcing non-core commercial and tourism operations/activities to enable conservationists to focus on the core business of biodiversity conservation has become an acceptable trend worldwide (Haines, 1996a & 1996b).

Since its establishment, YNP has gone through several financial crises to raise sufficient revenue from its operations to finance running costs. From the inception of YNP funding appropriated by Congress was not sufficient to meet all the costs. It then introduced the system of concessionaires to operate the park's commercial operations and businesses such as accommodation, shops, restaurants, trails and medical facilities with the hope of making a good return on the investment (Haines, 1996a; 1996b). YNP is regarded by world conservation agencies as a template for commercialization in saving cash-strapped conservation institutions (Bath, 1994). It remains to be seen whether commercialization will be the panacea of protected area management (commercialization is described in detail in 3.12).

YNP has four primary concession contracts to provide food and accommodation, merchandise goods, fuel service stations, guided tours and medical care. There are more than 100 other smaller business contracts covering a variety of activities like backcountry trips, guided fishing expeditions, snowmobile and coach tours, guided photographic safaris, research expeditions, and many other commercial activities (Littlejohn, 1996). Enterprises running businesses within the Park's premises are required to pay some type of annual fee. The four primary concessionaires are also responsible for all maintenance and improvements to the government-owned facilities assigned to them. The services that concessionaires provide and the rates they charge to tourists are subject to the park's approval. In addition to the checks and balances, all commercial operations are subjected to close monitoring to ensure that tourists receive quality services with minimal effect on park resources and other tourists. Concessionaire staff, numbering about 3 500 seasonal workers, is trained on park interpretation and mission because they are in close contact with tourists. A staff complement of eight professionals is responsible for managing the concessionaire contracts and total quality assurance management (Bath, 1994; Haines 1996b; YNP, 2000). There may be criticisms against commercialization in protected areas but YNP's programme appears to be well thought out and is managed by professionals and experts in the fields of business and tourism. It makes a world of difference[20].

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[20] Study visit to Yellowstone National Park, October 2002.

2.5.8.2 Budget

YNP receives the bulk of its funding from the US Congress' appropriation of tax dollars to the NPS. Although it would appear that there has been a slight monetary increase since 1980 (US$9,6m – 22,4m in 1998), the real inflation-adjusted operating budget has decreased by one percent during that period while visitation has grown by 50 %. In the financial year 2000 YNP received a base budget increase for annual legislated pay increases (see Table 2.3). What Yellowstone receives after submitting their estimates is far below their current needs. The accumulated backlog caused by decreasing budgets, capital backlog, maintenance of infra-structure and chronic under-funding of projects is estimated at US$700 million (YNP, 2000).

TABLE 2.3:   Yellowstone budget 2000

RECURRING	OPERATIONS & MAINTENANCE ($)	INVESTMENTS ($)	TOTAL ($)
Yellowstone Base Budget (operations)	23 041 000		23 041 000
Cost Recovery Special Use Fees	3 561 300		3 561 300
SUBTOTAL	*26 602 300*		*26 602 300*
NON-RECURRING			
Once-off Appropriated Projects	1 294 900	1 983 500	3 278 400
Private Donations	330 000		330 000
Fee Demonstration Programme	1 852 000	808 800	2 660 800
SUBTOTAL	*3 476 900*	*2 792 300*	*6 269 200*
CAPITAL IMPROVEMENTS			
NPS Construction Projects	516 000	2 511 000	3 027 000
Federal Highway Programme		9 000 000	9 000 000
SUBTOTAL	*516 000*	*11 511 000*	*12 027 000*
OVERALL TOTAL	**30 595 200**	**14 303 300**	**44 898 500**

Adapted from YNP (2000)

Much of the park's budget is allocated to fixed and mandated costs that are beyond its control. These include salaries/benefits, higher utility costs and increased water and sewage testing, employee background investigations and increasing visitation (by providing infrastructure). After meeting all these expenditures, minimal funding remains for adequate resource protection (conservation), tourist services and maintenance of park infrastructure (besides that which is allocated to concessionaires for commercial trade). Successive park managers have been forced to reduce staff, postpone maintenance of infrastructure, reduce interpretation

programmes, close some facilities during high season, not replace old and unsafe vehicles[21]. YNP managers estimate that it would need an additional US$20 million per annum to meet its operational and maintenance needs (YNP, 2000). Despite the financial difficulties, which are embedded in the founding charter of YNP, the commercialization programme has very positive lessons for emulation.

2.5.8.3   Reasons for success

There are several reasons why commercialization is successful at YNP:

- the concept of commercialization enjoys wide public and government support in the USA;

- congress created tax incentives for corporate businesses to invest in protected areas through commercialization;

- there is a management plan to regulate the operation of concessionaires at park level, no interference from Washington NPS headquarters;

- norms, standards and prices of goods and services have been jointly set by the park and the concessionaires;

- concessionaires offer services and products of high quality to the public;

- the park employs a team of eight tourism/hospitality/commercial specialists, a dietician and the local health inspector to monitor and evaluate the quality assurance and standards of the outsourced operations;

- maintenance of park infrastructure allocated to concessionaires greatly relieves the universal problem of poor maintenance levels;

- the medical rescue programme is efficient and of world-class standards; and

- the interpretation services, trails and outdoor exhibitions are highly developed for tourist enjoyment.

The search for alternative revenue sources for protected areas will continue as long as there is a near universal under-investment in nature management systems (Wells, 1997). Commercialization, however, should be confined to those non-core function commodities where a park lacks expertise and innovation. Another recent innovative protected area management approach is the Biosphere Reserve concept.

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[21] Similar cost-curtailment strategies are being implemented in the KNP resulting in retrenchment of staff and poor tourism facilities.

2.5.9   Buffer zones and Biosphere reserves

The origins of the Biosphere Reserve concept can be traced back to the Biosphere Conference organized by UNESCO in 1968. Biosphere reserves are designed to meet one of the most challenging issues that the world is facing today: how to conserve biodiversity and maintain healthy natural systems which, at the same time, meet material needs and aspirations of a growing number of people. To date, the "Man and the Biosphere" Programme (MAP) consists of a network of 408 sites with approximately 20 sites added annually (Bridgewater, 2002).

Biosphere reserves operate beyond protected areas. Their conservation objective is supported by research, monitoring and training activities on the one, and on the other hand is pursued by systematically involving the cooperation and interests of the local population concerned (UNEP, 2002).

The 1980's ushered in new experiments in the establishment of buffer zones, which represented important novel developments in protected area management and sustainable tourism. Buffer zones have for long been a feature of the UNESCO-sponsored biosphere reserve concept, where the management of surrounding areas according to a policy of limited or sustainable use of resources, protects the park's core conservation area (Western, 1994). One known example of a Biosphere Reserve concept is Zimbabwe's Communal Area Management Plan for Indigenous Resources (CAMPFIRE).

2.5.9.1 CAMPFIRE in Zimbabwe (Biosphere)

In 1988, a rural development programme, modelled on the UNESCO biosphere reserve concept, was established on communal land in Zimbabwe. The CAMPFIRE approach granted communities greater authority to manage wildlife on their communal lands, including the power to establish programmes for controlled wildlife harvesting for subsistence use and to gain a share of safari hunting revenues (sustainable tourism principles – see 2.4.1). In terms of this programme, revenue from wildlife may be applied for the common good of communities or shared among community members. In some cases district councils retain much of the revenue for use in community projects with very little eventually reaching individual households. CAMPFIRE was initially implemented in two Zambezi valley district councils, one of which surrounds Matusadona National Park on three sides. By 1993, more than 40 % of the total districts in Zimbabwe's communal areas had CAMPFIRE programmes running, involving

more than a quarter of a million people (Adams & McShane, 1992; Mbanefo & De Boerr, 1993; Metcalfe, 1994).

The significance of the CAMPFIRE programme was that it was designed to tackle environmental management and food security problems at grassroots level. It sought to help rural communities to manage their resources, especially wildlife, for their own development, thus advancing the concept of sustainable tourism. The programme's overall aim was to alleviate rural poverty by giving rural communities autonomy over resource management. It was also intended to demonstrate to them that wildlife is not necessarily just a hindrance to arable agriculture but also a resource that could produce food security (Logan & Moseley, 2001:3). CAMPFIRE compared arable cultivation, cattle rearing and wildlife management to economic alternatives vying for the use of the same scarce land and water resources. According to Murphree (1997), one of the most positive features of CAMPFIRE was seen to be its Zimbabwean origin. It was a programme for Zimbabweans by Zimbabweans seeking a solution to a Zimbabwean protected area management dilemma.

Further research is essential to quantify whether CAMPFIRE is a successful programme in economic and social terms. In the researcher's view the land reform crisis in Zimbabwe appears to have complicated matters for protected area management and it will take years to achieve the objectives of any rural development programme like CAMPFIRE.

Despite a lack of measured impacts of CAMPFIRE on the improvement of the quality of life of rural communities in Zimbabwe, the programme represents a radical shift from the colonial approach towards managing wildlife and adjacent park communities. It could become one of the mechanisms to manage stakeholders with different or conflicting objectives towards a common goal (one of the adaptive management principles – see 2.4.3).

2.5.9.2 *Transfrontier Conservation Areas (TFCA)*

The notion of conservation areas merging across political and physical boundaries is not new. Canada and the USA are credited with the honour of having established the first transfrontier park, namely the Glacier International Peace Park (USA) and Waterton Lakes National Park (Canada) in 1932. Today there are no fewer than 169 transfrontier protected area complexes worldwide, involving 113 countries. In Africa there are 35 complexes, involving 34 countries and 148 individual protected areas. These areas represent nearly 10 % of the world's network of protected areas and highlight their importance as a modern paradigm for the management of protected areas (Van der Linde *et al.*, 2001).

Albert National Park was the first TFCA in Africa, established by the Belgian colonial regime in 1925 to conserve natural resources in two countries. It spanned the colonial states of Ruanda-Burundi and the Congo. After independence in the early 1960s the Rwandan part became Parc des Volcans (Volcanoes National Park), while the Congolese part became Virunga National Park (Wilkie *et al.*, 2001). Poland and Czechoslovakia signed the Krakow Protocol in 1925 to set a framework for establishing international cooperation to manage border parks (Thorsell, 1990).

In southern Africa, the Kalahari Gemsbok National Park in South Africa and the Gemsbok National Park in Botswana have co-existed alongside one another for decades, unfettered by any dividing border fence. However, while wildlife ranged freely across the border, the area was never managed as a common entity (SANParks, 2002).

It was not until leading South African businessman Dr Anton Rupert[22] conceived the brilliant idea of promoting peace in southern Africa through conservation that the idea of "parks without boundaries" became an established concept in this region. In 1990, he established the Peace Parks Foundation and invited prominent leaders such as Nelson Mandela, as well as Prince Bernhard of the Netherlands, to be official Patrons and reflect the integrity of the Foundation's ideals. Through the facilitation and influence of the Foundation, the Southern African Development Community (SADC) has endorsed the principle of development across borders through transfrontier conservation.

In many African countries, including those in southern Africa, the primary reasoning for the establishment of transfrontier parks is economic development, given the people's dependency on natural resources. It is also integrating broader environmental concerns and natural resource management. The potential for nature-based tourism is very high and yet it is still under-exploited (Griffin *et al.*, 2001).

SANParks and its regional counterparts have pioneered the implementation of this SADC cross-border development strategy. The Kgalagadi Transfrontier Park was established on 7 April 1999 when the Presidents of Botswana and South Africa signed the treaty that gave birth to this park. A Joint Management Board oversees the implementation of the park management plan (Sandwith *et al.*, 2001).

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[22] Dr Rupert has recently retired as Chairman/President of the World Wide Fund South Africa but remains its chief patron. He is credited with many conservation success stories in southern Africa including the concept of transfrontier parks.

The Great Limpopo Transfrontier Park referred to in 1.10 was proclaimed in December 2002 when the Presidents of Zimbabwe, Mozambique and South Africa signed a joint treaty in Xai Xai, Mozambique. The mega-park consists of the KNP (South Africa), Gonarezhou National Park (Zimbabwe) and Limpopo National Park (Mozambique). The result is 3,5 million hectares of conservation land with enormous benefits for wildlife, tourism and community development. When fully developed it will become one of the largest international protected areas in the world (Sandwith *et al.*, 2001).

Discussions are well underway between conservation agencies in Namibia and South Africa on the establishment of the Ai-Ais/Richtersveld Transfrontier Park along the Orange River. Similar initiatives are in place for the Limpopo-Shashe Transfrontier Park, covering conservation areas in Botswana, South Africa and Zimbabwe (Griffin *et al.*, 2001).

Provincial conservation agencies are also involved in a number of transfrontier parks such as the Maloti-Drakensberg Transfrontier Park between South Africa, Lesotho and the Lebombo Transfrontier Park involving South Africa, Swaziland and Mozambique (Sandwith & Pfotenhauer, 2002). In southern African context, South Africa and SANParks are leading the pack in creating more transfrontier parks (SANParks, 2002). There are 20 transfrontier park initiatives in southern Africa alone. These TFCAs are not the focus of this study but are cited to illustrate yet more important innovative developments in the management of protected areas, with benefits likely to accrue to communities in the tourism business.

2.6   EVALUATION OF TOURISM MANAGEMENT IN PARKS

2.6.1   Tourism trends in protected areas

It is unusual in the field of protected area management to find all the applications of "best practice" or benchmarks in a single system; many such areas are good at doing some things (conservation) but perhaps not so good at others (tourism management). However, benchmarking is a more acceptable business practice in the business sector than in protected area management. It will take many years for benchmarks or indicators of best practice for protected areas to be established and standardised especially in a sector that still frowns at mixing business principles with conservation. Benchmarking is an essential practice to establish the standards of management, which protected areas should strive to achieve (see Annexure 15).

Overall, protected area managers have done relatively well in protecting and managing the environment (Harte, 2001). However, they cannot claim the same level of success in the areas of community participation, tourism management, corporate governance, financial management, human resource management, information management and technology. These are areas where conservationists do not always command the best of qualifications, skills and experience. Yet, without these areas, the equation of protected area management is incomplete, and long-term sustainability is in jeopardy. Protected areas are reluctant participants in commercial business operations, tourism management, marketing, fundraising and financial management (Eagles, 1997). The trends in Table 2.4 were noted from the management plans analysed.

TABLE 2.4:   Common weaknesses of park management plans

After studying the management plans of African, Australian, American, Canadian and Asian national parks, the following characteristics were observed by the researcher:

- Many management plans are old and range between 10 to 20 years old.
- Parks are established as non-profit organs of state and are not functioning like private sector profit-orientated businesses.
- The main purpose of their establishment is biodiversity protection, provisioning of recreational enjoyment to the public and benefit-sharing with their neighbouring communities.
- Tourism is narrowly interpreted as tourist management services often managed by staff who have no training in hospitality services or tourism.
- There are no specific researched tourism management plans.
- Corporate governance and financial management skills are lacking.
- Linkages between socio-economic sectors and biodiversity conservation are lacking.
- With the exception of the KNP many protected areas around the world receive 100 % of their funding from treasury or international donor organizations and are not dependent on tourism revenue to manage their operations.
- They receive far less funding than what they budget for every year causing an incremental backlog which has now reached crisis level.
- Most parks are all beginning to address their financial problems by turning to commercialization of their non-conservation products as an alternative to raise funds.
- Most national parks are not allowed to keep revenue raised from tourism themselves but pay it into central government treasury.
- In general, there are no defined mechanisms to involve communities living adjacent to the parks.
- Tourism facilities are not adequately maintained because of an inability to generate adequate revenue from either state coffers, donor organizations or tourism resources.
- They do not seem to have paid much attention to issues of corporate governance/administration and strategic management to achieve market advantage or competitive edge, probably for reasons associated with their status as quasi-government institutions.

Although pockets of excellence of tourism practice in protected areas exist as demonstrated elsewhere in this thesis, tourism in general tends to be relegated into secondary importance. In the 401-page IUCN report on the current state of protected areas worldwide (McNeely *et al.*, 1994), tourism appears to be an after-thought. Only eight brief sections are dedicated to tourism management and the collective coverage in this internationally important guide on protected area management would take up no more than four pages.

The current tendency for protected area managers to give tourism issues stepchild attention, almost as an afterthought, suggests, in the researcher's opinion, a basic flaw in the policy development process that makes it impossible to manage tourism professionally.

The general impression gleaned from park management plans and systems analysed in this study is that an overall, integrated tourism management philosophy is lacking. This tends to result in any attention to tourism issues being reduced to a regulation of tourist behaviour and providing interpretive services on conservation products. There exists a strong and legitimate emphasis on protection of the environment but, unfortunately, in relative isolation from balancing the needs of tourists, the tourism industry, financial viability and community needs. The manifold reasons for these deficiencies are found in the conceptualization and constitution of protected areas dating back to the two previous centuries' management paradigms. Tourism in protected areas is stuck in the time and place of previous eras.

Aspects of skills capacity in protected area management deserve urgent attention. Although protected areas employ many people and sometimes may even appear over-staffed, specialist tourism management warrant strengthening in many countries. To date, most senior protected area managers responsible for tourism are graduates of forestry, biological sciences, geography and wildlife conservation. *"In view of the complexities of issues faced in protected area management, protected areas need additional staff trained in other disciplines, particularly administration/management, tourism, social services, economics, financial management, business development, rural development and public relations"* (McNeely *et al.*, 1994:195).

In general, the economic benefits from tourism have thus far been suboptimal due to a lack of business approach in the packaging of products and marketing to a robust national and international market. Without integrated marketing plans, value-based pricing models and accrued benefits for local communities living in protected areas, the impact of tourism in protected areas will remain minimal and under-achieved. Although there are instances where local communities benefit from protected area tourism as is the case in Australia and New

Zealand, many communities living adjacent to protected areas the world over have neither access to tourism benefits nor the opportunities to participate in policy formulation and the general management of the parks (Dobias *et al.*, 1998).

2.6.2 Managing tourism impacts

Most of the management plans analysed in this research made reference to tourism impacts and the need to curtail tourism expansion in order to minimize such negative impacts. However, there were no explicit baseline, indicators or thresholds against which to monitor impacts. However some of the management plans reflect a deep understanding of managing impacts without explaining how such impacts would be measured, monitored and managed. For example, most parks have established zones for recreational activities but there are no indicators of how these are managed to prevent overuse. The KNP has identified a set of Threshold of Potential Concerns (TPCs) based on the ROZ Plan to monitor wilderness qualities (see Annexure 4) but never implemented it effectively due to shortage of skilled staff and funding.

Among the issues highlighted by management plans are carrying capacities and managing tourist impacts.

2.6.2.1 Carrying capacities

One area of tourism operations that has been broadly researched by ecologists and scientists is the concept of carrying capacity. In the late 1960s and early 1970s the Malthus' Population theory discussions about looming limits of the earth's carrying capacity due to population and economic explosion initiated widespread development of environmental awareness (Stankey *et al.*, 1985). The dual mandate of conservation and public enjoyment for national parks and nature reserves created a major challenge for protected areas with high visitation. In the USA, the National Parks and Recreation Act (P.L. 95-625) of 1978 prescribed that superintendents of national parks identify and implement commitments for tourist carrying capacities in order to define standards to protect the environment from human degradation. Since the 1940s, USA park planners have been struggling without great success to find the correct balance between conservation and tourism (Lindberg & Hawkins, 1993).

Similarly, not much research has been done in the management plans analysed in this study to determine what research has been done so far and how such plans are controlled. Tourism carrying capacity is still very much a thumb-suck estimate without much solid research, monitoring or interpretation of results anywhere in the world (Mathieson & Wall, 1982).

Carrying capacity is conventionally defined as the *number* of tourists an area can sustain without degrading natural resources and tourist experiences (Peterson, 1996). In tourism, different definitions of carrying capacities as well as a multitude of differing aims lead to equivocal applications. It is difficult to determine such a specific *number*. Mathieson & Wall (1982) point out that separate capacities exist for each of the economic, physical and social subsystems of relevance in a protected area. Lindberg *et al.*, (1997) express considerable discontentment with the concept of carrying capacity in tourism. They claim that the concept is not adequate to address the complexity found in tourism situations. In particular, they criticize the concept as being imprecise, a fact that hinders its operational application.

Furthermore, the subjectivity of the concept is often not realized by policy proponents who often perceive it as a scientifically objective concept. In its application to tourism planning, its focus on tourist use-levels or numbers of tourists is considered by Lindberg *et al.,* (1997) to be misguided and simplistic. It is clear that, in its application to applied ecology, the concept of carrying capacities involves normative characteristics and multiple levels that often vary, depending on the objectives. Arrow *et al.*, (1995) conclude that carrying capacities in their nature are not fixed, static or simple relations. They are contingent on technology, preferences and the structures of production and consumption. They are also contingent on the ever-changing state of interactions between the physical and biotic environments. A single number for human carrying capacity would be meaningless because the consequences of human innovation and biological evolution are inherently unknown. Carrying capacities are far from being universal constants. Thus carrying capacity is ambiguous. More modern concepts of carrying capacity have moved away from simplistic use of mere numbers of tourists, and rather use a range of parameters that measure impacts on biophysical resources and social conditions. When the KNP decides to review its current management plan, it will be advisable to develop a system of indicators against which tourism carrying capacity can be measured. The design of such a system of indicators will be the result of a process rather than an event.

2.6.2.2   *Tourist impacts*

Although the concept of carrying capacity was widely researched during the 1960s and '70s, in practice, carrying capacity did not generate effective and politically viable solutions to tourist management problems (McCool, 1990). In response to the practical differences of defining carrying capacity, a number of research-based management planning tools were developed as alternative strategies. Perhaps the most well known of these is the Limits of Acceptable Change (LAC). Holden (2000:142) defines LAC as "*a set of indicators which are reflective of an area's environmental conditions and against which standards and rates of change can be*

assessed". However, a number of other tools including the Recreational Opportunity Zone (ROZ), Visitor Impact Management (VIM) and Visitor Activity Management Process (VAMP) (see 6.8.2) have been developed by researchers working for the US NPS for use in their parks which have severe tourist congestion problems (Giongo *et al.*, 1994). These tourist planning and management tools address four fundamental planning steps in this debate:

- determine the current situation;
- decide what situation is desired;
- establish how to move from current to desired situation; and
- monitor and evaluate progress or success in attaining the desired situation.

In comparison with carrying capacity, the emphasis of these management tools has moved from defining limits to the number of tourists, to defining the degree of change that is acceptable within the system. This refers to social as well as ecological factors and is based on evaluating the state of the system by reference to a number of suitable indicators (Stankey *et al.*, 1985).

Once indicator limits have been defined, direct and indirect site and tourist management strategies can be implemented. Direct tactics for limiting use include the controlling of overall volume of tourists, dispersing use patterns away from heavily used areas, concentrating use patterns in designated areas away from fragile used areas, seasonal closure at sensitive times of the year and spatial zoning by level and form of use. Indirect tactics include tourist education and raising awareness of impacts (Giongo *et al.*, 1994).

Park managers should accept that inherent in management and planning tools like LAC, VIM, VAMP, ROZ, and others, two fundamental principles underscore tourism management in protected areas. One is that environmental impacts are an inevitable consequence of recreation whether based on consumptive or on non-consumptive use. The second principle is that environmental impacts are acceptable within the boundaries of established critical thresholds (Shelby & Heberlein, 1986; Kuss *et al.*, 1990). The chief objective of park managers is to determine such critical thresholds.

The determination of these critical thresholds involves quantitative assessments of environmental change and social judgment about the acceptability of such changes. As society's concern for the health of the natural environment increases, public attitudes will continue to exert considerable influence on environmental management and policy. Increasing environmental concern is a global phenomenon and not limited to specific national parks. If

LAC and VIM are going to yield successful results, research on tourism is needed to identify dimensions of social acceptability for different classes of impacts and the key precursors or correlates for them. As such, the influence of public concern on environmental impact judgement warrants research attention. Park users should also be targeted for such research because often tourist and manager perceptions regarding impacts diverge. What managers perceive as serious or noticeable negative impacts, go in many instances unnoticed by tourists and exert little influence on their experiences (Peterson, 1974; Downing & Clark, 1979; Lucas, 1979 & Lucas, 1980). This is also a long-drawn process that requires not just one study at a point in time but continuous research.

Protected area managers must set measurable goals to evaluate their effectiveness. Such evaluation mechanisms should be an integral part of their detailed integrated tourism policy statements for specific parks. A generic plan for such an evaluation framework has been suggested by the World Commission on Protected Areas (WCPA) of the IUCN.

2.7 EVALUATION CRITERIA FOR PROTECTED AREAS

2.7.1 Evaluation framework and indicators

It was alluded in 1.1 and 2.6.1 that protected areas do not seem to be efficiently and effectively managed (Dudley *et al.*, 1999) and that there is an urgent need to assess their management effectiveness.

However, in an almost infinitely diverse world, there can never be just one standard methodology for such a task. A sophisticated approach that will work in a wealthy country in North America may not work in sub-Saharan Africa; a process suitable for a vast area like the Great Barrier Reef Marine Park in Australia may be inappropriate for a small marine reserve; a methodology for a wilderness area in Alaska could be difficult to apply to a lived-in protected landscape in Western Europe (Hockings & Hobson, 2000). Equally, it may be difficult to apply the same methodology in assessing the management effectiveness of different national parks under SANParks' jurisdiction. Nevertheless, it is imperative to design an evaluation system to assess management effectiveness.

The worldwide trend has been the consideration of certification systems that relate to other components of natural resource management (forest management, ecotourism, ISO 14000) to extract elements that may be applicable in protected areas. In addition, a number of issues from the literature on general programme evaluation (e.g. evaluation forms and approaches,

who should be involved in evaluation, etc.) that has methodological implications have been examined. Non-methodological concerns have been considered only briefly and mostly only to the extent that they throw light upon methodological issues. Finally, some issues that are specific to the evaluation of protected area management (e.g. consideration of threats and local/regional differences in protected area management) have also been discussed (Silsbee & Peterson, 1991).

WCPA has suggested a framework for evaluation that can be flexibly applied to meet the needs of protected areas in different circumstances (Hockings *et al.*, in press). The framework is based on two principles:

- it must be strongly linked to the concerns and interests of managers; and

- it should be useable by managers in a wide range of circumstances around the world.

The framework suggests the division of evaluation into six elements; viz. context, planning, input, process, output and outcome (see Table 2.5).

2.7.2   How the evaluation framework works

2.7.2.1 Context*: It examines the conservation and other values of the protected area, its current status and the particular threats and opportunities that affect it, including the broad policy environment (including tourism). It helps to provide information about management focus by considering the particular threats and vulnerabilities of the area (Hockings, 1998; Hockings & Hobson, 2000).

2.7.2.2 Planning: This element focuses on articulating a vision of the intended outcomes for the protected area system or park. Assessment may consider the appropriateness of national protected area policies, plans for protected area systems, the design of individual protected areas and plans for their management. In particular, it can consider the design of a protected area in relation to the integrity and status of the resource. Issues of ecological nature and tourism will be of utmost importance, including shape, size, location and detailed management plans with indicators and measurement instruments (Hakizumwami, 2000; Ervin, 2000).

TABLE 2.5:   IUCN evaluation framework for protected areas

Elements of evaluation	Context	Planning	Input	Process	Output	Outcome
Explanation	*Where are we now?* Assessment of importance, threats and policy environment	*Where do we want to be?* Assessments of PA design and planning	*What do we need?* Assessment of resources needed to carry out management	*How do we go about it?* Assessment of way in which management is conducted	*What were the results?* An assessment of the implementation of management programmes and actions; delivery of products and services	*What did we achieve?* An assessment of the outcomes and the extent to which they achieved objectives
Criteria that are assessed	Significance Threats Vulnerability National context	Protected area legislation and policy Protected area system design Reserve design Management planning	Resourcing of agency Resourcing of site Partners	Suitability of management processes	Results of management actions Services and products	Impacts: effecs of management in relation to objectives
Focus of evaluation	Status	Appropriateness	Resources	Efficiency Appropriateness	Effectiveness	Effectiveness Appropriateness

Adapted from Hockings *et al.*, (in press)

2.7.2.3 *Input and process*: These elements respectively provide for intermittent assessments of the adequacy of resources and the standards of management systems relative to achieving the management objectives of a site. Assessment is based primarily on data about available resources and management processes that can be used to evaluate the effectiveness of management of individual protected areas or protected area systems. Inputs generally include a measure of resources (staff, funds, equipment, facilities) required at either agency or site level along with consideration of partners. The adequacy of management processes can be assessed through a wide variety of indicators, ranging from issues of day-to-day maintenance through to the adequacy of approaches to local communities, consumers of park tourism and various types of natural and cultural resource management (Ervin, 2000).

2.7.2.4 *Outputs*: Output evaluation considers what was done by management and examines the extent to which specific targets may be set through management plans or business plans. The focus of output monitoring is not so much on whether these actions have achieved their desired objectives (this is the domain of outcome evaluation), but on whether or not the activities have been carried out as scheduled and what progress is being made in the implementation of long-term management plans (Hockings & Hobson, 2000).

2.7.2.5   ***Outcomes***: This section assesses whether management has been successful in achieving the objectives established by a management plan, national plans and, ultimately, the aims of the IUCN category of protected areas (in this case Category II for national parks). Approaches to outcome evaluation involve long-term monitoring of the condition of the biological and cultural resources of the site/system; socio-economic aspects (tourism) of use and impacts of the site/system's management on local communities. In the final analysis, outcome evaluation is the true test of management effectiveness. The main constraint of this approach is that the scope of monitoring required is significant, especially given the lack of attention afforded to this aspect of protected area management in the past (with tourism emerging as the most neglected area of management). Thus, the selection of indicators to be monitored is critical. Outcome evaluation is most meaningful where concrete objectives for management have been specified, either in national legislation and policies or in site-specific management plans (Hockings, 1998; Hockings & Hobson, 2000; Hakizumwami, 2000; Ervin, 2000).

The Evaluation Framework provides a basis for designing systems for the assessment of management effectiveness. The Framework also provides a context for understanding the approach taken by various methodologies that have been developed over the last 20 years to assess management effectiveness of protected areas (Ervin, 2000). The Evaluation Framework shares similarities with the adaptive management cycle stages (see 2.4.2), and focuses attention on the establishment of a common vision, situation analysis (assessment), programme planning, implementation, monitoring and evaluation of the management process.

The Framework's principles will be adopted and adapted by this study in designing a tourism management framework for KNP. When a tourism management plan is being designed, the legal basis upon which a protected area is established becomes a critical point of departure. The legal framework of the KNP follows hereunder.

2.8   LEGAL BASIS FOR KNP TOURISM MANAGEMENT FRAMEWORK

2.8.1   National Parks Act, 1976 (Act No. 57 of 1976)

The National Parks Act, 1976 (Act No. 57 of 1976) currently forms the basis for the management of all national parks in South Africa. Since 1994 the said National Parks Act has undergone a series of amendments to sections that were either an embarrassment to the new

society (with racist connotations) or had effectively prevented the organization from performing its duties as expected. It is ironic that the legislation that established SANParks as a premier conservation agency in South Africa is out of step with a transforming country and out of kilter with the changing times and the challenges that it faces (Msimang *et al.*, 2003).

The national parliament is currently deliberating on a new bill, the National Environment Management: Protected Areas Bill (also known as the Protected Areas Bill) to give expression to the White Paper on the Conservation and Sustainable Use Policy of South Africa's Biological Diversity (1997). The proposed Protected Areas Bill will deal with the system of protected area management more broadly than the said National Parks Act and the National Environmental Management Act, 1989 (Act No. 107 of 1989). It will link the system of protected area management with current government policies and programmes, involving communities who live around national parks as participating stakeholders in the management processes of parks (DEAT, 2003). The Bill will also make communities beneficiaries of proceeds accruing from conservation and tourism activities that take place in parks. It will give effect to an ideal of meaningful participation of communities that is already championed by the IUCN worldwide.

2.8.2   Protected Areas Bill (Gazette No. 25052 of 3 June 2003) and management plans

The National Parks Act does not provide details on how protected areas should deal with the issue of drafting management plans or evaluation of management effectiveness. The Protected Areas Bill, Section 76, (Gazette No. 25052 of 3 June 2003) will change this situation. Section 40(1)(2) of the Bill will set management evaluation criteria for protected areas. The management authority of a protected area must manage the area exclusively for the purpose for which it was established, taking into consideration provincial legislation or municipal by-laws that affect it (DEAT, 2003).

Section 41(1) states that "*the objective of a management plan is to ensure the protection, conservation and management of a protected area concerned in a manner which is consistent with the objectives of this Act and for the purpose it was declared*". Section 41(2) defines the content of a management plan as:

- a coordinated policy framework;
- such planning measures, controls and performance criteria as may be prescribed;
- a programme for the implementation of the framework and its costing; and
- procedures for public participation.

The management effectiveness of a protected area will be measured against this criteria (DEAT, 2003). Section 42 (1) allows the management authority of a protected area to enter into an agreement with another organ of state, a local community, an individual or other party to co-manage a park. Such an agreement may allow for:

- the delegation of powers by or to the management authority or from the other party to the agreement;
- the apportionment of any income generated from the management of a park or other form of benefit sharing between the parties;
- the collection, catching or use of biological resources subject to provisions of the Protected Areas Act;
- access to sites of cultural or religious significance in the area;
- occupation of the protected area or portions thereof; and
- any other relevant matter (DEAT, 2003).

Section 43(1)-(4) of the Protected Areas Bill deals with performance indicators. The Minister or Member of the Executive Council (MEC) responsible for protected areas may establish indicators for monitoring performance with regard to the management of national or provincial protected areas. External auditors may be appointed to monitor a management authority's compliance with the overall objectives of the management plan (DEAT, 2003).

Sections 54 – 79 (Chapter 5) of the Bill deals with the continued existence of SANParks after the repeal of the National Parks Act (1976) during the current (2003) parliamentary session. The sections provide criteria for the selection and appointment of the governing body and define the functions, powers and operating procedures of the SANParks Board. (The management structure of SANParks is discussed in 3.3.) It also provides procedures for general administration and financial matters. SANParks is regarded as a Schedule 2 public entity for purposes of the Public Finance Management Act, 1999 (Act No. 1 of 1999) (PFMA) (as amended by Act 29 of 1999) and must comply with the provisions of the PFMA. The Minister of Environmental Affairs and Tourism has supervisory powers over SANParks (DEAT, 2003).

Any management plan proposed by SANParks or national parks under its jurisdiction is obliged to follow the procedures and prescriptions of the Protected Areas Bill once it has become law. This legal framework should be considered when drafting the tourism management framework.

2.9 THEORETICAL TOURISM MANAGEMENT FRAMEWORK

According to Keyser (2002), the tourism system is complex, comprising a number of sectors viz. market, destination, travel and marketing (see Figure 2.2). Furthermore, tourism operates in a social, environmental, political, economic and technological macro-environment. When formulating a management plan, the interdisciplinary perspective of tourism should be taken into consideration. This perspective is lacking in many park tourism plans.

FIGURE 2.2:   Tourism system
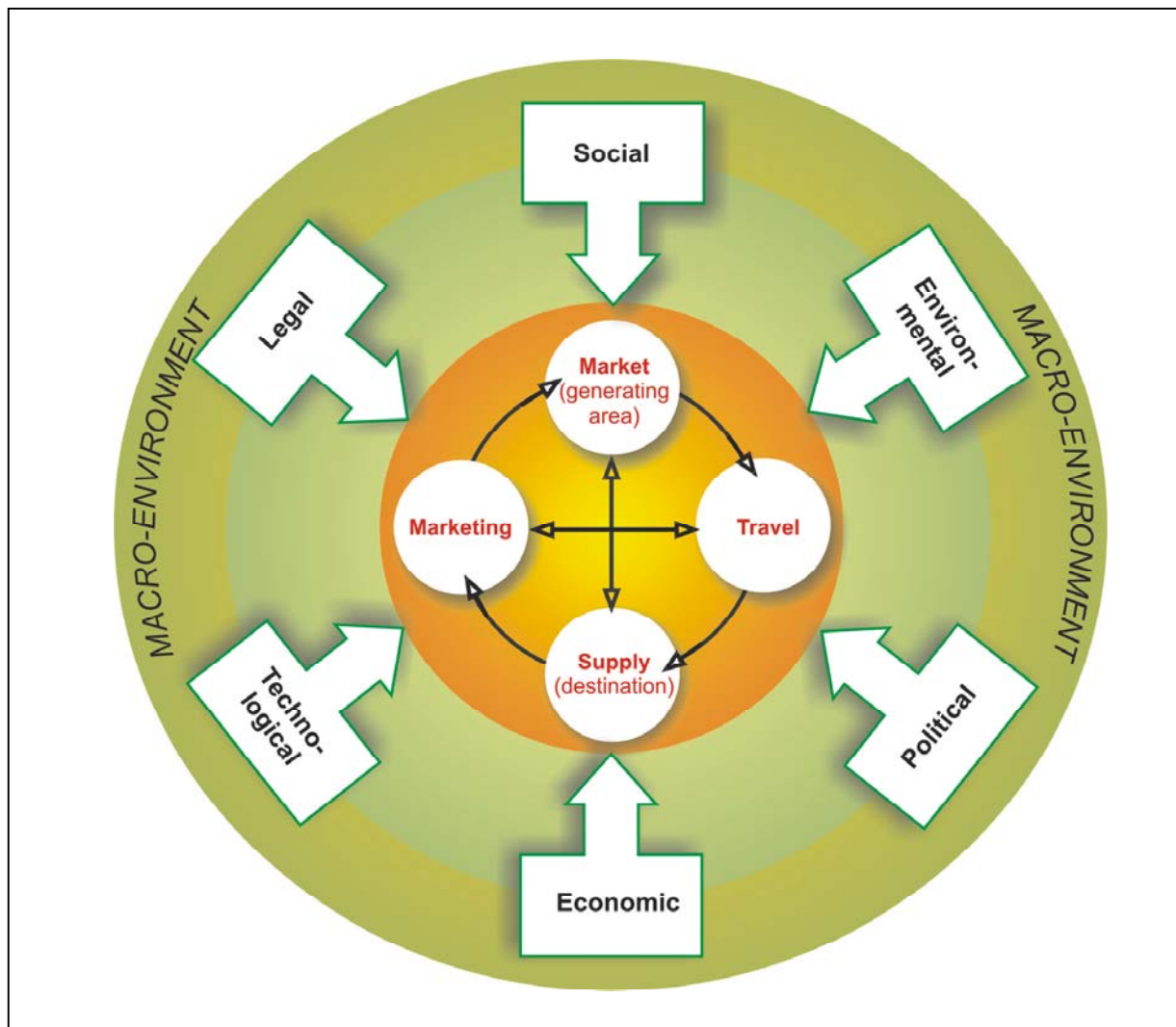
Adapted from Keyser (2002:23)

The following suggested elements should constitute a structure for an integrated tourism management framework for the KNP or any other protected area.

2.9.1   Elements of the theoretical management framework

This tourism management framework is born from the adaptive management cycle with its seven steps of development (see 2.4.2) and the common framework within which evaluation and monitoring programmes to test management effectiveness can be implemented (see the IUCN Evaluation Framework in Table 2.5 (2.7.1). When designing a tourism management framework it is imperative to include a vision, the current situation, intended outcomes, resources required, an implementation plan, monitoring and evaluation. The theoretical framework is suggested below and will be used to guide the framework in Chapter 6.

2.9.1.1   Vision and strategic objectives
- setting overall direction;
- reflecting and reinforcing general development objectives (in line with the objectives of the protected area); and
- management philosophy (sustainable tourism and adaptive management).

2.9.1.2   Situation analysis (collecting synthesizing and interpreting data and information)
- institutional arrangements, existing policies and plans, tourism product, tourism plant; and
- market/demand analysis.

2.9.1.3   Planning of programmes (intended outcomes)
- sensitive development/maintenance of infrastructure and products;
- setting criteria (indicators) to manage tourism impacts;
- tourist management (enforcement of regulations, enhancing tourist experience and tourist activity management process);
- product quality and service standards (indicators);
- marketing plan (business research/intelligence product segmentation, pricing policy, branding, marketing actions);
- setting financial targets (primary and secondary income);
- budget planning (capital and operational);
- linkages with the tourism industry; and
- tourism research.

2.9.1.4   Human resources development plan

- job analysis;

- recruitment and selection;

- human resource development;

- employee relations;

- occupational health and safety; and

- performance evaluation.

2.9.1.5   Implementation plan

- institutional arrangements;

- roles and responsibilities; and

- timeframes and resources.

2.9.1.6   Social responsibility

- communities owning land inside the park (e.g. Makuleke in northern KNP[23]);

- communities who do not own land inside the park; and

- environmental education.

2.9.1.7   Monitoring and evaluation

- developing a Monitoring Plan with indicators, procedures, analysis methods and resources for implementation (IUCN Evaluation Framework);

- monitoring tourist impacts;

- monitoring service quality; and

- corporate governance and compliance with the PFMA (South Africa, 1999).

2.9.1.8   Review of Management Plan (5 years)

- adjustment of plan and learning (adaptive management principles).

2.9.2   Business plan

From this management framework an annual business plan with measurable targets or key performance areas will be developed (see 6.14 about business planning).

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[23] The restitution process resulted in an agreement with SANParks returning land ownership to the Makuleke community after they were deprived of their land through the forced removal policy in 1969.

2.10   CONCLUSION

The objective of this chapter was to analyse protected area management systems and their management to illustrate benchmarks that could guide the development of a theoretical tourism management framework for the KNP. The chapter has revealed that there has been an evolution in the management systems of parks over decades. Whereas people were excluded in the classic management paradigm, the modern paradigm calls for an integrated approach to protected area management. Different systems ranging from co-management and biosphere reserves to transfrontier parks exist as part of the broadening of the scope of protected area management. The twin components of biodiversity conservation and public enjoyment are integrated through the individual protected area's ability to raise sufficient finance to manage its activities.

The relevance of ecotourism and sustainable tourism principles in providing human benefits to the public to make parks sustainable was emphasized. It was demonstrated that although profit is not the primary motive for establishing protected areas, such protected areas will not realize their primary objectives without a strong financial muscle and good governance. Tourism is a legitimate and legal function that could contribute immensely to the conservation of biological diversity in protected areas. Park management plans lack integrated tourism direction. Government does not have the capability to access capital funding for product development on a scale that would optimize returns on tourism opportunities.

Protected areas tend to be seen and managed as islands, ignoring the essential links with local communities, other stakeholders and the wider natural environment beyond their boundaries. Many of the existing protected areas do not measure the effectiveness of their management plans against set criteria to evaluate their progress. A theoretical framework to underpin the development of a tourism management framework was suggested.

In Chapter 3 the historical exposition of tourism in the KNP will be discussed within the management context of both KNP and SANParks, to draw lessons that will be applied in the proposed tourism management framework. The management structures of SANParks and the KNP will also add perspective on how tourism has been managed in the past to enable the study to make future improvements.

CHAPTER 3

HISTORICAL OVERVIEW OF TOURISM DEVELOPMENT IN THE KNP

3.1   INFLUENCE OF AFRIKANER NATIONALISM

The objective of this chapter is to provide an exposition of the historical overview of tourism development in the KNP. It also explains the management structures of both the KNP and SANParks to illustrate how tourism is managed in relation to other park activities. It highlights successes and failures of the KNP tourism system to facilitate the formulation of an integrated management framework for tourism.

The creation of any national park anywhere in the world can only be understood in the context of time and place when the event took place (Carruthers, 1995). Apart from the need for formal protection of wildlife, which in South Africa was almost exterminated through hunting in the late 19th century (Mabunda *et al.*, 2003), the proclamation of the KNP was influenced by many intertwined circumstances including political, economic, social and cultural imperatives (Cock & Koch, 1994). On the one hand there was a general acceptance that the principle of a national park was morally correct, that the viewing and studying of wildlife constituted a legitimate and desirable action in furthering the protection of the wildlife ideal (Carruthers, 1995; Pollard *et al.*, 2003). On the other hand there were socio-political and economic reasons that are often glossed over when the story of the KNP's success is related by ecologists.

The KNP was proclaimed during a period when an aggressive, though perhaps still nascent, Afrikaner nationalism and a search for a white South African identity were unfolding (O'Meara, 1983). This national identity was manifested in the unveiling of a new South African Flag (1928), the adoption of Afrikaans as an official language (1925), the revival of Voortrekker traditions by the Ossewa Brandwag Movement led by Dr Hans van Rensburg, the resurfacing of republican ideals and the loosening of imperial ties with Britain (Davenport & Saunders, 2000). It was against this backdrop that Eskom (the electricity utility), Yskor (Iron & Steel Corporation) and others were established as a form of state economic intervention to support the growing nationalism economically (O'Meara, 1983). In the private sector Afrikaner-led businesses such as Sanlam, Uniewinkels and Volkskas supported the Union Government's economic policies in dealing with the poor white problem (O'Meara, 1983). The establishment of the NPB added value to the government's programme of offering employment opportunities

- promote academic scientific research.

3.3.1.3 Tourism Department

- maximize (financial) contributions from tourism operations;
- create appropriate opportunities for public use, benefit and enjoyment;
- create benefits for local communities;
- create opportunities for academic research; and
- balance tourism and conservation objectives.

3.3.1.4 People and Conservation[25]

- improve demographics of park attendance to represent all South Africans;
- promote environmental education in South Africa;
- build good relationships with local communities; and
- build support among staff.

3.3.1.5 Corporate Services Department

- human resources management;
- finance; and
- information technology, legal services, administration, capacity building and purchasing.

3.3.1.6 Parks Department

- various operational conservation, tourism and support services of 19 smaller parks excluding the KNP.

3.3.1.7 KNP Department

- Various operational conservation, tourism and support services in the KNP (SANParks, 2002, McKinsey, 2002).

3.3.2 KNP in the SANParks stable

The KNP derives its mandate from the main SANParks vision and mission. The mission statement of the KNP is "*to maintain biodiversity in all its natural facets and fluxes, and to*

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[25] New name since structure review in 2002 when it was then called Constituency Building.

to unskilled and semi-skilled whites (Carruthers, 1995). It was a precursor to the present day Affirmative Action.

South Africa was not an exception in the nationalistic interpretation of wildlife conservation in that early era. Countries like the USA had led the way by doing the same when establishing their national parks (Clepper, 1966). The reliance on nature as proof of national greatness began in earnest after American independence from Great Britain. The USA idea of national parks had nothing to do with preservation of nature but the mobilization of the American national feeling to satisfy a painfully felt desire for time- honoured traditions for the New World as opposed to the Old World (Europe) (Runte, 1987). In Australia, the sentiments of nationalism fed upon and encouraged the romanticization of the Australian frontier experience (Birckhead, 1992; Wallace, 1992). National parks appear to be connected to a certain stage in a country's cultural evolution and help to weld together different groups. In the KNP's case the national park status it achieved in 1926 played a crucial role in the unification of English-speaking and Afrikaans-speaking white South Africans despite their cultural differences and economically different orientations (O'Meara, 1983). The two groups found common ground and consolidated their interests in conservation to the total exclusion of black people from this newly found national interest (Carruthers, 1995).

3.2   SCIENTIFIC CONSERVATION

From the conservation perspective, and as part of the classic paradigm of protected area management, initial philosophical views regarding the KNP were influenced and shaped by internationally reputable thinkers, philosophers, scientists, biologists, preachers and activists who developed the idea of environmentalism and its significance to the survival of all life forms (Fabricius *et al.*, 2001). This was in response to the dramatic environmental degradation caused by the Industrial Revolution in Europe (Guha, 2000).

The responses to environmental degradation led to an ideology of "scientific conservation". This new ideology of rational management of resource areas brought forests and other natural resources under state control (Commoner, 1972). The growth of the wilderness idea was a direct response to the ideology of "scientific conservation". American intellectuals such as John Muir, Aldo Leopold, Ralph Waldo Emerson and Henry David Thoreau followed the examples of the likes of Shelley, Byron, Wordsworth and Keats in promoting the idea of preserving wilderness areas from the onslaught of the plough and the bulldozer (Runte, 1987). In colonies like South Africa, large areas were cleared of the indigenous people and conserved for the exclusive use of white colonizers and their progeny (Guha, 2000).

Rolston (1989), in his work *Philosophy Gone Wild,* exerts a great influence on environmental ethics based on homeostasis and natural laws. According to the homeostasis theory the planetary system is essentially closed and life proceeds by recycling transformation, a principle that is embraced by the adaptive management approach. The recycling of systems results into a balance of nature and energy in a dynamic evolutionary process. Rolston sees it as an ethical and moral obligation for mankind to come to terms with his environment and the resources at his disposal, promoting rather than disrupting those great cycles of nature – of water movement, energy flow and transformation (similar to the cycle stages of the adaptive management process) – that has made life possible. Mankind must seek to achieve a "steady state". The planet is a homeostatic system of finite resources and careless use of such resources has implications of an impending tragedy.

Rolston (1989) further argues that the wilderness is the scarcest resource and is threatened with imminent extinction if drastic steps are not taken to protect it. Nature is so special to man because it yields commodity, beauty, wisdom, discipline and spiritual healing. Certain areas and landscapes are preserved for their beauty and value and should be protected from destruction by man. Wild beauty adds spiritual quality to life and therefore wilderness is not a luxury but a necessity for the protection of humanized nature and for the preservation of mental health.

The question that this study raises is how, in a developing country like South Arica where poverty prevails at such high levels, can it be justifiable to preserve natural resources for its sake alone and in total exclusion of human use or enjoyment as these early environmental philosophers suggest? Even in First World countries like the USA, Canada, Australia and New Zealand, national parks were set aside for human recreational enjoyment and nation building in addition to wilderness preservation (Pigram & Sundell, 1997).

The early history of the KNP and its tourism growth was influenced to a large extent by these philosophical viewpoints of environmentalism. The traits of this era are still very much alive in the KNP today as it will be demonstrated later in the philosophical position and wilderness management approaches of the different epochs of management in the park. It is imperative to briefly analyse the organizational structure and functions of SANParks and the KNP to facilitate a deeper understanding of the problems associated with a lack of a tourism management plan in the KNP and how tourism has been managed in relation to other functions since 1927.

3.3   SANPARKS AND KNP MANAGEMENT STRUCTURES

When the KNP was opened for tourists in 1927 the function of tourist management was incorporated in the ranger's primary activities. Rangers built accommodation, roads and regulated tourist behaviour (Carruthers, 1995). Until 1998 no Department of Tourism existed at the Pretoria Head Office of National Parks Board (NPB, 1996). The responsibility of this department includes, *inter-alia,* giving strategic direction to marketing, product development, sales and tourism standards within a conservation context. Phillips (2003b) describes the general policy statement and the management capacity of the Department as "very weak". Its functions are narrow when it comes to helping business units (national parks) in formulating management plans with checks and balances to manage tourism impacts and service quality. The 2003 corporate tourism business plan approved by the Directorate resembles that of a hotel group operating in an urban environment. It does not reflect the crosscutting edges of a symbiotic relationship that exist between conservation and tourism in a protected area management system context. It lacks a management philosophy to guide tourism development in a protected area and perpetrates the "two-systems-in-one" approach between tourism and conservation. Its focus is purely financial and marketing. The corporate tourism department has yet to give a comprehensive strategic tourism direction to the individual national parks.

3.3.1   Head office (Pretoria)

SANParks is established as a non-profit organ of state by a parliamentary statute, the National Parks Act, 1976 (Act No. 57 of 1976), as amended. The Minister of the Department of Environmental Affairs and Tourism is the political head responsible for SANParks and appoints the 18-member non-executive Board of Trustees (see Figure 3.1) to manage a system of 20 national parks across the country. The Board's term of office is three years and it is accountable for the overall performance of the organization. The Board has delegated the day-to-day management of SANParks activities to the Chief Executive and his team of Directors (executive managers).

The vision of SANParks is *"national parks will be the pride and joy of all South Africans".* The mission to achieve this vision is captured in three components:

- Protection of biodiversity through a network of national parks;
- Public use, benefit and enjoyment of national parks; and
- Building a constituency for conservation.

The mission's objectives are captured in the corporate business plan (SANParks, 2002) under different departments, as follows:

FIGURE 3.1: Organizational structure of SANParks

Minister of Environmental Affairs & Tourism

Board

Chief Executive

Executive Manager

Kruger National Park	Parks	Conservation Services	Corporate Services	People and Conservation	Tourism
Various operational functions	Various operational functions	- Scientific services - New Park plan/develop - Wildlife management - Flight services - Environ management systems	- HR - Finance - Legal - IT - Admin - Capacity building - Purchasing	- National awareness - Environ education - Local community programme co-ordination	- Marketing - Product development - Sales (trade) - Direct sales - Tourism standards

Communications

Commercialization

3.3.1.1 Chief Executive Officer

- strategic direction for all national parks;
- corporate Communications and Public Relations;
- commercialization as a special project[24];
- internal audit; and
- board secretariat.

3.3.1.2 Conservation Services Department

- effectively manage current parks to protect biodiversity;
- establish new parks to cover representative biomes unique to South Africa; and

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[24] Commercialization is currently managed as a special project attached to the CEO's office. This arrangement will probably be reversed when the function will be merged with the tourism department.

provide human benefits in keeping with the mission of SANParks in a manner that detracts as little as possible from the wilderness qualities of the KNP …" (Braack, 1997a)[26].

The KNP is one of the key departments reporting to the Chief Executive and because of its size, number of employees (2000) and critical mass in revenue generation (80 % of SANParks tourism turnover), it functions as a semi-autonomous business unit and has decentralized head quarters at Skukuza. Like all directorates in SANParks, the KNP has a director, who is a member of the national directorate participating in the overall management of the organization (see Figure 3.2). The KNP is a matured product in the SANParks product range. Its annual budget is approximately R250 million, including grants and donations in kind.

FIGURE 3.2:   KNP management structure, 1 April 2003
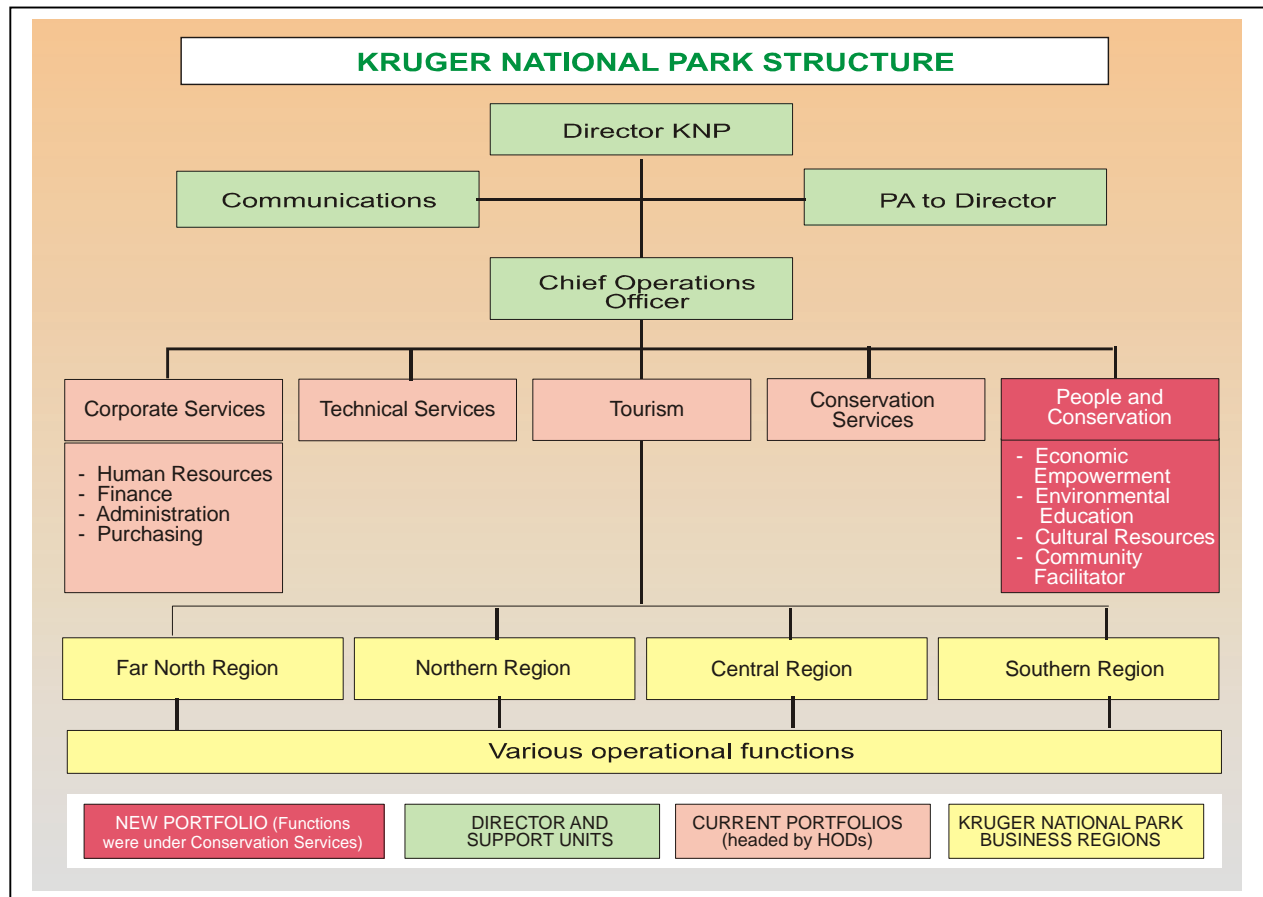
From the missions of both SANParks and the KNP it is evident that national parks exist for three reasons, viz. conservation management, provisioning of public benefits through sustainable tourism and establishing mutually beneficial partnerships with communities.

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[26] Currently a review process for improving the mission and objectives to accommodate tourism objectives is underway.

National parks are not created for financial gain but for intangible aesthetic, spiritual and societal values.

However, to achieve their mission, money is needed and because of shrinking state subsidies it becomes imperative for national parks to use their natural resources to generate maximum benefits to carry out these functions (Mabunda *et al.*, 2003). In the developed world the cost of national parks administration and operation is entirely borne by the state through the fiscus, but South Africa is not such a rich country (Mabunda & Fearnhead, 2003). Given the realities of past inequities the state is faced with challenges of providing social services, educational facilities, health facilities (including fighting the HIV/Aids pandemic), addressing the housing backlog and rising unemployment, and many other pressing needs. The future survival of national parks depends on finding innovative ways of generating revenue and embracing corporate governance practices (Mabunda & Fearnhead, 2003). The KNP, being the first national park under the old NPB to offer tourism services, laid a foundation for the development of a funding model based on offering tourism services to the public. It is therefore imperative to explore the history of tourism development to gleam lessons to be used in the proposed tourism management framework. An account of how this has evolved follows.

### 3.4	ROLE OF EARLY GAME RANGERS IN TOURISM DEVELOPMENT

Tourism in the KNP owes its origin to the dedication and commitment of the park's early game rangers who built the initial tourist accommodation from wattle and daub material (Joubert, 1986a). By 1929 about 17 such huts had been built at Skukuza, eight at Pretoriuskop, four at Malelane, three at Lower Sabie, 22 at Satara, eight at Olifants, four at Gorge[27] and 12 at Letaba as initial accommodation for tourists. Tourists had to provide their own linen and food and had to fetch water from the nearest rivers or wells (Joubert, 1986a, 1986b). Unfortunately, development was often retarded by insufficient funds. In 1929 the total amount available to cover all operational and capital expenses was £11 000, comprised of grants from both central government and the provincial administrations. Progress was further delayed by periods of severe drought and poverty caused by years of depression and World War II (National Parks Board of Trustees, 1976).

In the researcher's view credit must be given to the early KNP game rangers and their black labourers for the yeoman service rendered in laying a solid foundation for the successful

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[27] An old camp on the Olifants River gorge which was discontinued.

management of a national park that has become an icon in South Africa's national parks management system. They did this under severe constraints in a harsh untamed environment and nothing should be taken away from this achievement. If it were not for those humble beginnings there would be no world-famous KNP to showcase to the world today.

During the Twentieth Century much has been achieved in the KNP. However, as posterity now views the traversed distance, a few mistakes (to be covered in the rest of the thesis) come to the fore. Undoubtedly more mistakes will be made in the future in equally good faith. It is for the new generation management to move with the times and bring current market and ecological trends on board in sharpening service-delivery for the enjoyment of the tourists and to make the KNP the pride and joy of all citizens rather than to apportion blame.

A new business model, commericalization, is being pursued and non-core activities such as shops and restaurants are being outsourced to enable park management to concentrate on core business in line with the new SANParks mission. To do this effectively, management must be based on a solid scientific foundation and on structures that allow the KNP to adapt and respond quickly to an ever-changing system (Mabunda *et al.*, 2003). According to Pollard *et al.*, (2003:422), *"Kruger's managers need to understand the broader landscape patterns and how they have changed"* and adapt accordingly. It is therefore necessary to probe whether the KNP's current business model is up to this challenge.

3.5   BUSINESS PERFORMANCE OF THE KNP

In the context of a developing economy, a national park that conserves two million hectares of wilderness area, hosts over one million tourists per year, is 100 % self-funded from its tourism operations, generates R220 million tourism revenue (approximately R30 million is raised from donors and grant funding), directly employs approximately 2 000 people and is perceived *"to be offering local populations accessibility to their heritage"* is considered a goose that lays the golden egg. Its sustainability is crucial in terms of both conservation and economic development (Ferreira & Harmse 1999, Stevens, 2002). Whilst the above facts reflect an image of an organization that is performing well financially, reality reveals otherwise.

Fearnhead (2003) challenges Ferreira & Harmse's (1999) perception of the KNP's successful business performance. He argues that SANParks' business performance had been traditionally poor in all departments except conservation. In tourism the levels of productivity and service were far below industry norms. Costs of sales were found to be three times higher than those in the private sector. To compensate for the lack of skills and poor quality products,

SANParks staffing levels were overloaded with personnel. For example there would be more waiters than clients in the Skukuza Restaurant until a process named Operation Prevail, a staff reduction restructuring programme, right-sized the KNP in June 2001 (SANParks, 2002; Fearnhead, 2003). The profitability of the KNP is therefore circumstantial and not sustainable.

3.6   ECONOMIC IMPACT OF KNP TOURISM

Tourism revenue generated from protected areas constitutes a large part of the country's economy. Unfortunately, economic evaluation data of this kind is scarce and often unreliable. For example, tourism is not conventionally defined as an industry sector in South Africa and it does not have its own Standard Industrial Classification Code (SIC). Elements of tourism appear under various industry classifications such as transport, accommodation, retail, hotels and others (Keyser, 2002). It is not possible at this stage to know precisely what the KNP's economic impact is on the South African economy.

As a result of such deficiencies, societies tend to undervalue the benefits derived from protected areas and do not support providing capital injection needed to maximize the flow of benefits. Although the economic evaluation impacts of the KNP have not been conclusively measured to date, there exist measurements of the value of all financial transactions made by tourists, government and donors. Impacts have been measured in terms of labour income and the number of jobs created (McKinsey, 2002).

The KNP serves as a major conservation and tourism resource base to the rest of Africa and some of the Western countries constantly use the template as an example of best practice in biodiversity conservation. The KNP is one of the strongest South African brands (Grant Thornton Kessel Feinstein, 2001). A sizeable number of people abroad recognize the name of KNP better than the names of the new provinces of South Africa or the country itself. Research by independent institutions like SA Tourism and Kessel Feinstein show it to be one of the destinations most inbound tourists wish to visit. Accordingly it enjoys the predominant position as a tourist destination, estimated to constitute 16 % of the total ecotourism market in South Africa. SA Tourism records reflect that 31,5 % of all long-haul tourists visit the KNP. This makes it the second most visited destination after Cape Town. The per capita-spending in the KNP amounts to R315 per person per day. Approximately 65 % of all tourists to South Africa express a wish of having the KNP on their itinerary and that makes it (KNP) a major reason to visit South Africa. The significance of the KNP to the overall tourism spend of R27 billion by inbound tourists is that, without the KNP, more than 50 % of tourists would stay away from South Africa (McKinsey, 2002).

Approximately 2 000 permanent and 500 seasonal employees are directly and indirectly employed by the KNP. The newly established concession areas will generate another 683 permanent jobs excluding employment created during the construction phase. In general, concessionaires have undertaken to recruit 79 % of their employees from previously disadvantaged communities. Concessionaires have also undertaken to outsource minimum guaranteed Rand amounts of contracts with a commitment of R 6,3 million per annum by the third and following years (Mabunda & Fearnhead, 2003).

Statistics South Africa should be approached to design a programme in its economic data-collection system to accommodate in future the impact of protected area tourism and tourism in general to the economy. Such a step will make government realize the economic value of the national parks system to the general economy and the people of this country.

3.7   HISTORICAL GROWTH OF TOURIST NUMBERS

According to manual data collected over past decades, indicators point to an explosion in tourist numbers over the past 75 years of tourism services in the KNP. Whereas only three vehicles entered the park in 1927 and the total revenue earned was £3, 1928 saw a slight increase with the number of motor vehicles reaching 180, bringing with them 850 tourists (Carruthers, 1995). However, progress was delayed by periods of severe drought and poverty caused by the post-1929 worldwide depression. There was no money to create adequate infrastructure and the installation of the first windmill was made possible only in 1929 through a donation of £150. Since then many benefactors have assisted with donations that were used beneficially for both nature conservation and tourism infrastructure projects (Raad van Kuratore vir Nasionale Parke, 1976).

The post-World War II period was characterized by further tourist growth motivated by the quest for white unity, nationalism and a people bent on forgetting the difficult war years (Carruthers, 1995). Tourist numbers increased from 45 465 in 1947 to 366 381 by 1970. The meteoric growth influenced the Board to introduce a reservations system in 1957 to allow a smooth flow of tourists to available facilities. This did not deter tourists from flocking to what had become a "pilgrimage" for white South Africans (Brynard, 1962). Table 3.1 indicates the growth of tourist numbers in the last 20 years in the KNP.

TABLE 3.1:   KNP tourist numbers over 20 years, 1982/83 – 2002/03

FINANCIAL YEAR 01/04 - 31/03	TOTAL NUMBER OF GUESTS	% CHANGE	NUMBER OF FOREIGN GUESTS	% CHANGE	% OF TOTAL
1982/1983	445 661		35 931		8,1
1983/1984	451 780	1,4	33 796	-5,9	7,5
1984/1985	509 173	12,7	30 778	-8,9	6,0
1985/1986	462 657	-9,1	26 640	-13,4	5,8
1986/1987	474 066	2,5	15 167	-43,1	3,2
1987/1988	563 989	19,0	24 247	59,9	4,3
1988/1989	625 772	11,0	53 046	118,8	8,5
1989/1990	669 167	6,9	71 090	34,0	10,6
1990/1991	696 757	4,1	78 811	10,9	11,3
1991/1992	680 443	-2,3	61 112	-22,5	9,0
1992/1993	660 568	-2,9	65 005	6,4	9,8
1993/1994	635 044	-3,9	52 287	-19,6	8,2
1994/1995	710 734	11,9	75 775	44,9	10,7
1995/1996	835 393	17,5	154 871	104,4	18,5
1996/1997	906 999	8,6	181 502	17,2	20,0
1997/1998	954 398	5,2	193 600	6,7	20,3
1998/1999	948 732	-0,6	201 423	4,0	21,2
1999/2000	898 191	-5,3	210 603	4,6	23,4
2000/2001	804 060	-10,5	202 161	-4,0	25,1
2001/2002	933 488	16,1	214 903	6,3	23,0
2002/2003	1 059 122	13,5	280 606	30,6	26,5

Adapted from Stevens, 2002

For many decades successive Park Wardens have debated at length the extent and limits to which tourist enjoyment of the park's facilities and products could be met without debasing the wilderness qualities of the park (Braack, 1997a). As early as 1930, Col. James Stevenson-Hamilton, the first Park Warden, reported that the rest camps were "overflowing" with more than 30 cars putting pressure onto the 500 km of new tourist roads (Brynard, 1962). At that time facilities were grossly insufficient (to what they are today) and as a result of these problems, tourists slept in tents or in their cars. The Park's rangers had no alternative but to accommodate some of the tourists on the verandas of their own homes (Joubert, 1986a). Each Park Warden had his own view of the tourism service reaching full capacity and on how it was to be designed and executed in order to meet growing tourist numbers. There were no written management plans or policy to regulate tourism services. Most of their ideas were motivated by their unselfish love of the park and personal concerns.

Tourist regulations therefore evolved in direct response to practical circumstances and tourist demands for more accommodation and conveniences (Carruthers, 1995).   In 1956 Park Warden Louis Steyn tried to persuade the Board to peg the limit of tourists to 80 000 per year (Steyn, 1956). The Board never implemented the suggested limit and numbers have since grown and exceeded the one million mark per year without any visible loss of appeal to the public (see Table 3.1) (Stevens, 2002). During the 1970s and 80s the opening up of the park to tourists all year round, the rapid expansion of infrastructure provisioning[28] (roads and accommodation) and the successful malaria control programme gave park tourism an unprecedented tourist growth (KNP, 1990).   However, concerns are beginning to emerge about traffic congestion during peak holiday periods in the southern region of the park (Ferreira & Harmse, 1999).

The KNP experienced a decline of tourists between 1991-1994 because the country was boiling with acts of violence between political factions. Concerns about random violence deterred tourists and numbers to the KNP plummeted. In 2000 the park was hit by devastating floods that washed away infrastructure and caused extensive damage amounting to over R100 million. The park was closed for 10 months with no trade and that affected its revenue and tourist numbers (Stevens, 2002). Tourism is a vulnerable commodity and managers need to build in contingency measures in their management plans to be able to deal with cash flows or operational financial commitments when such crunch times arrive.   One such contingency plan is to grow domestic tourism to support protected areas.

There has been a massive increase of foreign tourists (25 %) to the KNP in the last five years. After the terrorist bombing of the World Trade Centre in New York on 11 September 2001, South Africa was perceived as the safest destination in the world and foreign tourists to the KNP have increased tremendously since that time. Figures released by Statistics South Africa show that 6,4 million tourists visited South Africa in 2002, an increase of 1,8 million compared to 2001. The country continues to be the world's most rapidly growing destinations with tourist figures jumping 20,1 % in the first quarter of 2002. The KNP and Cape Town continue to be major attractions although tourists are also venturing to other destinations (Sunday Times, 2003)[29]. The KNP faces tough competition from African and national parks around the world and needs to address such competition strategically to return its market share.

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[28] Massive investments to improve facilities and roads were made between 1958-1989.
[29] The strength of the Rand at R6.30 – R6.90 between October 2003 and April 2004 has made South Africa an expensive and thus unattractive destination that is still performing well on average. This has led to the decrease of tourist arrivals compared to early 2003.

3.8   COMPETITIVE ENVIRONMENT

Table 3.2 summarizes the competitive environment in which the KNP operates. The KNP competes against larger regional destinations featuring different products such as beaches, shopping malls, restaurants, casinos, big hotels and natural features rather than provincial or national parks. Notable competitors include the Western Cape, North-West (because of Sun City), KwaZulu-Natal and Eastern Cape (due to the beaches) and the growing private reserves/luxury lodges niche. There is no provincial or national park offering the same products as the KNP that attracts over one million tourists per annum in Africa; however, parks in East Africa compete at a comparable level with the KNP (IFC, 2001). These include the Ngorongoro, Serengeti, Masai Mara, Selous, Tsavo and Nairobi, to mention but a few (Matawonyika, 1989). The competitive advantage of the KNP is its developed wildlife product and its world renown brand. The private lodges along the KNP western boundary focus on the overseas top-end luxury market segment with heavy leanings on the KNP. They all use the KNP as the drawcard in their marketing strategies that they border the world-famous KNP (IFC, 2001).

Hotels and guesthouses in the Lowveld area offer more luxury levels of accommodation compared to the KNP at similar rates or lower for tour groups. The safari open-vehicle industry has established a niche for itself by offering to transport guests from neighbouring hotels and guesthouses for a day's trip to enjoy the superior KNP wildlife product. The chalet accommodation offered in KNP is basic, simple and unattractive to travellers with city hotel expectations while domestic tourists find KNP accommodation to be reasonable and affordable (see results of survey on accommodation and commercialization in 4.2.5). The biggest plus-factor for the Western Cape, North-West and the Eastern Cape is their malaria-free status which is used by marketers to lure tourists away from the KNP (although such negative marketing is detrimental to the attractiveness of South Africa as a tourism destination). However, thanks to successful malaria-control programmes run by the KNP, malaria incidents have been reduced remarkably. The KNP also competes with similar destinations in the SADC region. These include parks in Botswana, Mozambique, Zambia and the East African countries of Tanzania and Kenya (IFC, 2001). In the international arena the KNP competes with fine parks in the USA, Canada, Australia, New Zealand, South America and Europe. The accommodation facilities on offer in overseas parks are benchmarked at hotel levels and are far superior in quality to those offered in the KNP (SANParks, 2001). One of the questions this study seeks to answer is whether tourists want luxury hotel accommodation or simple, clean and natural accommodation when visiting a park (see 4.2).

TABLE 3.2:   Competitive environment for KNP

CONSUMER NEEDS	KNP COMPETITIVE EDGE	COMPETITORS	COMPETITORS' COMPETITIVE EDGE
Ecotourism destination	Large well-known brand/ Conservation status well recognized/ Large surface area/ Extensive biodiversity	Provincial reserves (local and national)	Location
		Private reserves (local and national)	Location and higher service standards and product quality Well-established distribution network.
		Other national parks in SA	Location and different identity (landscape)
		National parks in Botswana, Tanzania, Zambia, Kenya etc.	Less developed and more rustic
		National parks in the USA, Canada, Australia, New Zealand, Asia, Europe, Central & South America	Closer to home/ free from malaria if outside tropics
Leisure destination	A well-known and well established experience which is attractive due to uncomplicated freedom provided in planning ones experience/ Reasonable value for money	Coastal destinations (KwaZulu-Natal, Eastern Cape and Western Cape)	Better during peak SA holiday season (December) and provides a good experience for families
		Provincial and private reserves	Location and service standards.
		Moçambique	Good value for money, scenery, adventure, coastline, culture
		Botswana	Good national parks/ more rustic and less developed
Luxury game lodge destination	All brand-new and placed within a world-renowned park	Adjoining private reserves	Well-established market distribution network
General overnight destination	Well-established and stable brand/ unique night ambience, no unnatural disturbances/ night sounds	Overnight network on periphery of Park (B&B, hotels, time-share, golf estates, guesthouses)	Less overheads and better prices with better standard of service (value for money)
General day visit destination	Very affordable (Wild Card)/ well-known brand/ large surface area/ well-established infrastructure/ well-managed/ safe destination with law enforcement	Drakensberg escarpment	Huge diversity of tourism attractions – scenery, waterfalls, adventure, historic, fishing
		Private reserves	Location

Adapted from KNP, 1990; SANParks, 2001; IFC 2001: Stevens, 2002; value-laddering (see Table 4.26)

The KNP will continue to face tough competition from hotels and guesthouses situated around its borders mainly in the independent budget traveller group and the luxury market segment. Because of the history of providing poor food and beverage services rendered by the park's restaurant and cafeteria outlets, guests in these two groups prefer to stay outside the park for better food and comfort and only enter the park as day visitors to enjoy the park's superior wildlife viewing product (McKinsey, 2002). After the recent outsourcing of restaurants and facilities as part of the commercialization programme (see 3.12), guests perceive service

levels and the quality of food to be poorer than they were before outsourcing (see 4.2.7). This matter needs urgent remedial action.

3.9   KNP OCCUPANCIES

Table 3.3 shows the occupancies of the KNP between 1993/94 – 2002/03. Unit occupancies have vacillated between 66 % and 78 % due to market fluctuations in the domestic and international sources of tourists to the KNP. Bed occupancies have traditionally been poor and the KNP has not succeeded in achieving break-even results on the number of beds sold (Fearnhead, 2003). This results in under-performance, which should be addressed by various strategies such as accepting last-minute bookings, jerking up the reservations system (which does not immediately reflect available accommodation after cancellations) and a vigorous promotion strategy to fill vacant beds during low seasons. The overall SANParks tourism performance (Annexure 2) shows that, in general, bed occupancies are lower than unit occupancies. The KNP sells 92,8 % of game drive seats, 94,8 % of day walks and 52,6 % of wilderness trails while there is very little similar business generated by other national parks with similar potential (see Annexure 2). The business of tourism is not optimized in KNP and there are many opportunities that could be opened with proper management of the tourism portfolio in all national parks as it is suggested in this study.

TABLE 3.3:   KNP occupancies over 10 years, 1993/94 – 2002/03

YEARS	UNIT OCCUPANCY	VARIANCE (%)	BED OCCUPANCY	VARIANCE (%)
1993/94	70,7		58,6	
1994/95	71,5	+0,8	58,7	+0,1
1995/96	78,6	+7,1	64,5	+5,8
1996/97	77,2	-1,4	62,4	-2,1
1997/98	74,2	-3,0	60,1	-2,3
1998/99	71,7	-2,5	57,5	-2,6
1999/00	66,6	-5,1	53,8	-3,7
2000/01	65,3	-1,3	52,3	-1,5
2001/02	69,7	-4,4	56,2	+3,9
2002/03	74,8	+5,1	59,8	+3,6

Adapted from KNP Annual Reports, 1993-2003

During the 2001/2 financial year the KNP only sold 51,6 % of its beds and 69,6 % of its units, thus performing far below its potential (Stevens, 2002). The importance of filling beds with

occupants cannot be over-emphasized. Less people per unit or hut results in lost revenue for the unoccupied beds. The cost of not marketing the KNP is evident on the low bed occupancy rate. The image that the KNP is inaccessible because it is fully booked abounds in the minds of the public. Only a sound marketing plan, as part of an integrated SANParks marketing plan, can address this issue. What needs to be done is to determine the type of strategy and the exact role of where this marketing activity should take place within the organization. The KNP has 80 % of the total number of beds in SANParks and is therefore justified in having its own marketing section.

3.10   QUALITY OF KNP PRODUCTS

In the case of the KNP, product quality covers scenic beauty, wildlife attraction, cultural experiences, wilderness qualities of the park in general, interpretation services, information dissemination, cleanliness of accommodation and surroundings, high service levels, house-keeping and hospitality, good food and beverages[30], road infrastructure, transportation, staff training, health and safety of tourists. These make up an attractive product mix. Unfortunately, senior managers at SANParks are still arguing about what constitute their product, let alone its quality.

Product quality has the potential to develop an institutions' market advantage as part of the broader destination marketing strategy. The key to gaining such a market advantage is by setting measurable standards that can be monitored by means of ongoing surveys. According to Van der Walt *et al.* (1998) a competitive advantage can be generated if an enterprise can add value to its product range that its competitors cannot emulate. This implies performing some activities better, at a lower cost or completely different from its competitors. It is therefore important that the KNP should conduct a competitor analysis survey to identify its own value-added chain as well as that of its competition.

The assessment of tourist perceptions about the current tourism and recreational value system in the KNP in Chapter 4 indicates the shortcomings of the product. Briefly, current park customers expect standards of service levels of infrastructure and quality of amenities in the KNP to be equivalent with those in comparably priced destinations outside the park. They want soft linen (not hard, starched linen), new sheets and towels (not threadbare), a good and healthy diet (not greasy canteen food), an option of double beds, televisions (where appropriate), telephones, swimming pools, facilities for children, night-time activities and

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[30] Tourists expect good food but there are serious complaints about the quality of the food in the restaurants and cafeteria (see Chapter 4).

interactive wildlife experiences. The question of whether televisions, swimming pools, hot-air balloons and telephones are acceptable in a national park remains a contentious and recurring debate. Current thinking by conservationists in the KNP constrains such innovations. In future, such matters should be thoroughly investigated by means of credible surveys and all possibilities weighed before implementation.

Although the early game rangers and scientists did a commendable job in developing the KNP product to the level where it is today, this park now has very limited prospects of tourism success in today's highly competitive global tourism markets and in satisfying the expectations of a changing South African society. It is on the basis of these reasons that the KNP needs to graduate from the "game ranger tourism approach" to a new comprehensive and modernized tourism system by improving the quality of its products. Any management plan should encompass the above elements and aspirations to meet the robust challenges of biodiversity conservation, the dynamic tourism market and the transforming South African society. Such a system should consider adopting appropriate pricing policies to keep tourists happy and generate a fair return on the business.

3.11   PRICING POLICY

There is no recorded evidence of the existence of a pricing policy in the KNP or SANParks prior to 2003. According to Carruthers (1995) the NPB suffered in the past from a perennial shortage of money because charges were minimal and revenue earned from tourists did not meet the initial high expectations raised. The government was unwilling to commit financial support for tourism development. Tourist regulations and pricing of products evolved in response to practical circumstances (KNP, 1946). As a result of such a pricing history many of the products and services rendered by the KNP and other parks are either priced below or above current market prices and prices do not match the value of goods and products.

Traditionally, entrance fees to the KNP have been kept low as part of a broader social or educational objective, in order to facilitate "accessibility" to what is regarded as a national heritage. Such an approach might have been appropriate in a country that could afford it, because easy access does seem to cultivate an appreciation for wildlife and national parks and such a gesture generates political goodwill. However, South Africa is a developing country facing many socio-economic problems (Mabunda & Fearnhead, 2003). Only the relatively affluent and rich groups could afford to pay these "low" prices and such a benefit brings with it a high opportunity cost. The dilemma is exacerbated when the increase in international tourists is taken into account. It would therefore be unrealistic to expect the South African

Government to subsidize the use of the national natural heritage by affluent foreign tourists. Undercharging simply increases the cost to the national treasury of maintaining the park's estate and it represents an opportunity cost to biodiversity (Msimang *et al.*, 2003).

The pricing policy is a key element of park tourism worldwide. In wealthier countries protected areas are seen as a public good for the benefit of all members of society. The state funds all park operations. In poorer countries other public services like education, health, housing, social grants and other needs are deemed to be more deserving of scarce public funds. When this happens, protected areas must earn revenue from tourism or other forms of resource use as suggested earlier in 1.4 of this thesis (Eagles *et al.*, 2002).

Each park is unique and established according to a set of objectives. When formulating pricing policies, park managers must take into consideration the unique characteristics of the park, values of the area, the park's objectives and a focused rationale for fees. Each rationale must be clearly defined in order to defend it against scrutiny from park users and political bodies (Mabunda & Fearnhead, 2003).

In examining pricing schemes for access to protected areas in both developed and developing countries, Brown (2001) concluded that prices should be based on tourist demand for access (see Table 3.4). Park managers should choose fee levels that are neither capricious nor inequitable. A range of pricing schemes can be used for protected areas but flexibility in fee structure is crucial.

TABLE 3.4:   Pricing schemes applicable to protected areas

PRICING SCHEME	DESCRIPTION
Peak load pricing	Different prices for different times, depending on demand.
Comparable pricing	Pricing based on average of user fees charged by other parks for equivalent attractions or services (difficulties may arise when a park is unique and there are no other comparables on which to benchmark).
Marginal cost pricing	Prices set where the added costs equal the added benefits derived from a park; prices set at the intersection of the marginal cost and marginal benefit curve.
Multi-tiered pricing	Different prices based on residency, age, location, etc. (these have been found to yield more revenue than high or low fees alone, but have limitations).
Differential pricing	Different prices based on level of service offered (e.g. different prices for camp-sites in different locations of a park may result in a more even distribution of use or increase in revenue). Different prices based on citizenship (foreign nationals paying more than locals).

Adapted from Brown, 2001

The revision of pricing policies is usually accompanied by an unavoidable price increase for certain categories of tourists, especially foreigners. Tour operators in South Africa are against the differential gate fees (Wild Card) introduced on 1 June 2003, in terms of which foreign tourists are charged more than South Africans. Very often concerns that increased fees will discourage tourists from visiting have proved to be unfounded. For example, in Costa Rica tour operators were strongly opposed to the introduction of a two-tiered fee structure, yet revenues actually went up. Similarly, when fees were doubled in Grand Canyon, Yellowstone and Western Canadian national parks, tourist numbers remained the same. In Ontario provincial parks in Canada fee increases of over 40 % resulted in substantial increases in tourists. The new income allowed for the provision of better and new recreational services, so attracting more tourists (Moos, 2002). Tourists are generally ready to pay for improved product quality.

The SANParks Wild Card is partly an attempt to introduce a pricing policy (see Annexure 3). Unfortunately, it addresses admission fee issues only (conservation fees) and leaves the whole question of product and service pricing in abeyance. The proposed tourism management framework should raise the awareness and the need to create a pricing structure to address accommodation, experiential products and other activities offered by the KNP. According to the McKinsey Report historical poor pricing has contributed to the current financial under-performance of the KNP (McKinsey, 2002). The problem of financial under-performance has coerced the KNP and SANParks to consider alternative models of revenue generation such as "commercialization".

3.12   COMMERCIALIZATION AS A CONSERVATION STRATEGY

The term "commercialization" evokes different emotions in different people because of the wide spectrum of management options it can entail (Hughes, 2003; Mabunda & Fearnhead, 2003). It could mean development of a basic service ethic to complete privatisation of parks involving the selling of both land and infrastructure (IFC, 2001). In the case of SANParks, commercialization implies an intention to generate additional revenue as a means of ensuring better conservation of national parks. This additional revenue is generated by granting the private sector the opportunity to operate within national parks but without alienating any of the assets (Mabunda & Fearnhead, 2003).

Private companies are awarded concessions within national parks, i.e. an opportunity to build and operate a tourism facility or to take over an existing line of business like shops, restaurants, petrol stations, cleaning, the laundry, garden services, small bush camps and

concession sites (to build luxury lodges to cater for the top end of the market) (IFC, 2001). Concessionaires are expected to design, construct, operate, maintain and manage the assets they take over from SANParks for a contract term ranging from nine to 20 years under strict environmental management regulations. The Public-Private-Partnership (PPP) must exhibit the correct mix of financial strength, requisite business experience and strong empowerment credentials amounting to 20% shareholding by the empowerment component. It is estimated that, at maturity, tax receipts from commercialisation will be R60 million per annum. Commercialization at SANParks is a conservation strategy that will allow staff to concentrate on the core business, viz. conservation, and outsource peripheral businesses to PPP Partners (Fearnhead, 2003).

The founders of the KNP probably had neither understanding nor the intention of implementing "commercialization" in a conservation area (Mabunda & Fearnhead, 2003). It is now a reality that state subsidy grants, the traditional sources of funding, are fast diminishing worldwide (James, 1999). Despite the reluctance of conservationists to associate nature conservation with money, the twin components of biodiversity conservation and human access within national parks are integrated through finance. The biodiversity component has the typical public-good characteristics and no one should be excluded from enjoying its benefits (Mabunda & Fearnhead, 2003). By contrast, tourism is also another public good consumed by those who are willing to pay for it. Because protected areas have both attributes it is possible to charge for some aspects of the tourism public good and to employ the net proceeds to subsidize the environmental management component (IFC, 2001).

There are many conservationists who do not share the view that protected areas should be financially self-reliant (Kumleben *et al.*, 1998). They believe the state should pay for it, but in a country that has many competing socio-economic needs for state financial resources, it will be naïve to expect the state to fund conservation of biodiversity entirely from the public purse (Mabunda & Fearnhead, 2003). Protected area managers are increasingly turning their attention to finding innovative tourism-based funding strategies such as "commercialization" of trade businesses in parks, facility rentals, concessions and involvement of the private sector in conservation areas (Hughes, 2003).

As Hughes (2003) remarked, commercialization faces considerable opposition from the public and such a scenario compounds the complexities of the dilemma. Critics of commercialization claim that the system has a controversial history and is not sustainable. They further claim that it leads to exclusivity by hiking tariffs and the wholesale selling of animals to raise money for

investment. It would appear that the focus of commercialization is too much on profit rather than biodiversity and heritage management (Macleod, 2003).

Tourists that are looking for quietness and a simple life to escape modern city squalor are bitterly complaining about the "commercialization" of the KNP's products sold in the shops, cafeteria and restaurants. They also complain about the use of modern utensils and equipment in the self-catering units. They demand African cuisine rather than Euro-centric or American junk food as symbolized by the advent of McDonald and Burger King. There is a substantial voiceless but powerful resistance to what tourists believe is over-commercialization of KNP products (see survey in Chapter 4).

There exist within SANParks internal conflicts and suspicions between conservationists and top management on matters of levels of tourism emphasis, commercialization strategy, product range, pricing, marketing, norms, standards, and general tourist management systems. The Scientific Services section in the KNP feels that it was not fully involved in the feasibility study before the concession areas were introduced. The KNP rangers feel they were "coerced" into submission by management against a background of a massive restructuring process dubbed, "Operation Prevail", that was underway. The continued management of the concessionaires by the Head Office-based commercialization unit, detached from both the park and the tourism department, seems to be widening the gaps and blurring defining lines between policy and operational roles. It is difficult to manage relationships between concessionaires and park staff because such relationships are perceived to be a prerogative of the commercialization unit in Pretoria and not park-based officials[31].

Some environmentalists, like Dr Ian Player (a former Board member), are concerned about what appears to be an exclusive focus on fundraising by park managers at the expense of sound conservation management (M-Net, 2001). The fear is that commercialization in the KNP may be encouraged exclusively for financial gain with potential negative impacts on the park's natural resource management. On the other hand, the tourism industry, consisting of suppliers, tour operators and distributors, is very worried and vulnerable to this argument. It is possible that in future, when environmental deterioration may become evident due to lack of proper park tourism development plans and strategies, the "green movement" could blame the tourism industry for this damage and could exert considerable pressure on the government and the public to have tourism in the KNP severely curtailed (Venter, 2002).

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[31] Interview with Danie Pienaar, Head of Scientific Services, KNP, 13 May 2003.

Whilst there is a legitimate need for commercialization in protected areas it is imperative for SANParks to take the expressed concerns of the public and internal stakeholders into consideration. There were many spontaneous remarks made by respondents on the subject of commercialization and in the general remarks section of all the questionnaires and in interviews (see Chapter 4) during the empirical phase of the study. Because of the huge public outcry on commercialization, the researcher suggests that SANParks conducts intensive research that can be published and feasibility studies per project to demonstrate how commercialization will impact on the management of the park system before embarking on further commercialization options.

3.13   FINANCIAL VIABILITY

There are many conservationists who are really offended by the thought that the conservation of wildlife or biodiversity should pay its own way and believe that Government has the responsibility to protect biodiversity (Mabunda & Fearnhead, 2003). A formal expression of this sentiment appeared in the report emanating from an Investigation into the Institutional Arrangements for Nature Conservation in South Africa (also known as the Kumleben Commission of 1998).

The Kumleben Commission concluded that: *"nature conservation as such can never be self-supporting. … It is therefore short-sighted and fallacious to expect a protected area to be economically self-sufficient"* (Kumleben *et al.*, 1998).

There are flaws in this argument because there are national parks that are so attractive to tourists that they generate revenue and make a surplus to maintain themselves adequately. In this category are the KNP, Tsitsikamma, Cape Peninsula, Kgalagadi Transfrontier Park, Mountain Zebra, Golden Gate and Addo Elephant National Park. However, there are those that will never become financially viable in the short and medium-term because, although they protect important biomes, they are not attractive to tourists. This category includes many of the developing national parks under SANParks (Mabunda & Fearnhead, 2003).

National parks in South Africa are part of a collective system and the collective could become self-funding because the contribution from the first category of parks is greater than the loss by the second category (SANParks, 2001). There has always been reluctance among some of the previous and present SANParks managers to place self-funding on the list of national parks objectives, apparently out of fear that the government would withdraw its subsidy grant.

No funding sources are guaranteed in a country that has to address an array of socio-economic needs because of the apartheid legacy of imbalances (Khumalo, 2001). Good governance requires that SANParks devise strategies to mitigate the inherent financial risks by becoming enterprising to generate more funding. Currently the state subsidizes the organization to the tune of R63,6 million (18 %) of the total SANParks budget. The balance is generated from tourism revenue, donations and sales of fauna and flora (Mabunda & Fearnhead, 2003). The finance directorate estimate of a sufficient budget is in the region of R650 million per annum to meet the current backlog on maintenance and capital projects adequately.

The government grant over the last ten years (1993/94 – 2002/03) has not increased significantly to compensate for inflation (see Table 3.5). In its 1989 submission to the Board of Trade and Industry's investigation of strategies to stimulate tourism growth in South Africa, the South African Tourism Board (SATOUR) predicted that the state subsidy to the then NPB would grow from R33 million in 1990, to R59 million by 1995, to R103 million by the year 2000 and to R182 million by the year 2005. During this period the NPB (SANParks) would devise innovative means to raise revenue to enable it to cease to be a drain on the treasury and be financially independent (RSA, 1990). Unfortunately this has not happened. The financial squeeze did not begin after 1994 as many people are led to believe by the media but was evident since the creation of protected areas because of poor governance and financial management skills. The new government started to improve the situation by re-instating the inflation-eroded R12 million roads grant discontinued in 1998. Furthermore, government has also agreed to fund the national park development programme to expand the national parks system by acquiring additional land from existing owners. The numbers are substantial: R8 million for 2002/3, R42 million for 2003/4 and R51 million in 2004/5. There is, therefore, little substance to a questioning of the government's support and commitment to funding the country's national parks although there is much room for improvement to fund the environmental management component adequately (Mabunda & Fearnhead, 2003).

Poverty relief funds amounting to approximately R250 million in the 2003/2004 financial year were also channeled to labour-intensive projects to help build more infrastructures for conservation and tourism purposes in all national parks under SANParks. This is "ring-fenced": money that cannot be used to fund operational costs like salaries and purchases. However, the government still insists that it will not subsidize national parks indefinitely, and at some future stage SANParks will be weaned from the public purse (Financial Mail, 2001). This

is all the more reason for commercialization and the adoption of a new business model that will replace the state subsidy grant[32] when government decides to pull the plug on SANParks. Unfortunately, very few sections of the public are at this stage aware of this predicament facing SANParks management.

TABLE 3.5:   Government grants allocated to SANParks over 10 years, 1993/94 – 2002/03

South African National Parks: *GRANT HISTORY*			
Financial year	**Government R**	**Roads R**	**Total R**
1993/94	40 905 000	9 625 000	50 530 000
1994/95	39 648 738	9 660 000	49 308 738
1995/96	39 814 000	10 635 000	50 449 000
1996/97	46 209 000	11 688 000	57 897 000
1997/98	46 439 000	12 857 004	59 296 004
1998/99	50 000 000	0	50 000 000
1999/00	51 000 000	0	50 000 000
2000/01	51 000 000	0	50 000 000
2001/02	51 683 000	12 000 000	63 683 000
2002/03	48 752 000	12 000 000	60 752 000

Adapted from KNP Annual Reports, 1993-2003

Despite some setbacks, the KNP is the only national park in the world that is self-reliant and finances its entire operation from revenue raised from tourism (see Financial Statement in Tables 3.6 and 3.7). In addition, it cross-subsidizes other national parks within the network of SANParks that are still at a developmental stage.

However, (in the researcher's opinion) the financial viability of the KNP as reflected in Tables 3.6 and 3.7, needs to be put into perspective to arrive at a better understanding of the financial constraints under which it operates. If the costs of buildings, depreciation, income tax, property rates, real cost of car rentals (which are hugely discounted presently), donations and other liabilities were to be included as overheads, the current profit margin would be drastically reduced or wiped out completely. The KNP still depends on substantial donations for tourism

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[32] The Government grant is transferred to SANParks corporate budget and not to that of the KNP (see Tables 3.6 & 3.7). These amounts exclude poverty relief grants which are a once-off phenomenon.

TABLE 3.6:   KNP financial statement, 2002/03

Kruger National Park
INCOME STATEMENT

	Actual 2002/03	Budget 2002/03	Actual 2001/02
Gross Revenue	**-234 241 586**	**-223 172 409**	**-233 449 645**
Retail Income	*-15 400 095*	*-15 692 458*	*-21 681 263*
A005 - Facilities Rental	-15 012 363	-13 130 205	-6 201 161
Gross Profit	*-387 732*	*-2 562 253*	*-15 480 102*
GP %	*0*	*0*	*0*
A010 - Sales in retail outlets	-36 666 534	-34 425 730	-72 927 744
A020 - Cost of sales	36 278 802	31 863 477	57 447 642
B010 - Tourism income	-178 227 591	-173 268 590	-154 320 740
C005 - Concession fees	-4 335 098	-2 347 884	0
Gross Operating Revenue	-197 962 784	-191 308 932	-176 002 003
C010 – Other income	-28 242 803	-8 057 118	-12 902 790
D010 – Government grant	0	0	0
D020 – Road grant	0	0	0
D030 – Grant – Local authorities	0	0	0
Total Income	**-226 205 587**	**-199 366 050**	**-188 904 793**
M010 - Human resource costs	103 750 183	103 206 886	97 826 206
D010 - HR costs (establishment table)	80 673 240	83 139 170	77 597 567
D013 - Pension / Provident fund	7 141 517	7 744 058	7 112 209
D014 - Other Post retirement b	0	0	0
D020 - HR costs – Other	16 150 800	12 680 607	13 573 140
D030 - Capitalizing – HR costs	-215 374	-356 949	-456 707
M020 - Maintenance costs	18 637 015	11 939 935	13 348 537
M040 - Other expenditure	63 034 819	48 962 786	37 942 601
M030 – Depreciation	6 867 865	5 962 346	6 275 626
Total Expenditure	**192 289 882**	**170 071 953**	**155 392 973**
EBITA	*-33 915 705*	*-29 294 097*	*-33 511 820*
M050 - Finance costs	990 522	3 617 452	1 991 186
Profit from Operations	**-32 925 183**	**-25 676 645**	**-31 520 634**
P050 - Restructuring costs	0	0	0
P040 - Discontinuation costs	0	0	308 689
P060 - Donation	-546 803	-104 000	-412 720
P020 - Grant – Land acquisition	0	0	0
P030 - Sales fauna & flora – L	-3 262 883	-2 820 000	0
Profit from ordinary activities	**-36 734 869**	**-28 600 645**	**-31 624 665**
C010 - Abnormal expenses	0	0	144 000
S010 - Extraordinary income	-2 597 791	0	-12 029 228
S011 - Extraordinary flood grant	0	0	0
T010 - Extraordinary expenses	4 485 715	0	12 847 263
T012 - KNP Fire Disaster Investigation	1 051 247	0	2 000 000
Net Profit	**-33 795 698**	**-28 600 645**	**-28 662 630**

TABLE 3.7:   **SANParks overall financial statement, 2002/03**

South African National Parks
INCOME STATEMENT

	Actual 2002/03	Budget 2002/03	Actual 2001/02
Gross Revenue	**-317 096 544**	**-305 132 749**	**-315 047 843**
Retail Income	*-19 586 830*	*-20 388 602*	*-29 152 214*
A005 - Facilities Rental	-17 786 173	-15 380 267	-7 531 939
Gross Profit	**-1 800 657**	**-5 008 335**	**-21 620 275**
GP %	**0**	**0**	**0**
A010 - Sales in retail outlets	-45 715 309	-46 591 662	-94 584 012
A020 - Cost of sales	43 914 652	41 583 327	72 963 727
B010 - Tourism income	-247 333 986	-240 712 936	-212 800 313
C005 - Concession fees	-6 261 076	-2 447 884	-131 579
Gross Operating Revenue	**-273 181 892**	**-263 549 422**	**-242 084 106**
C010 - Other income	-43 220 302	-16 690 868	-32 275 408
D010 - Government grant	-48 752 000	-48 752 000	-51 683 000
D020 - Road grant	-12 000 000	-12 000 000	-12 000 000
D030 - Grant – Local authorities	-11 506 230	-11 800 000	-11 530 172
Total Income	**-388 660 424**	**-352 792 290**	**-349 572 686**
M010 - Human resource costs	203 437 369	188 890 679	187 842 386
D010 - HR costs (establishment table)	142 843 361	153 449 575	136 327 829
D013 - Pension / Provident fund	11 912 927	13 163 117	11 698 826
D014 - Other Post retirement b	15 263 288	725 888	19 333 534
D020 - HR costs – Other	32 633 167	21 709 048	20 939 555
D030 - Capitalizing – HR costs	-215 374	-356 949	-457 358
M020 - Maintenance costs	34 444 058	26 591 604	21 943 666
M040 - Other expenditure	138 110 105	119 253 213	107 589 885
M030 – Depreciation	12 149 746	10 314 239	10 959 336
Total Expenditure	**388 141 278**	**344 849 735**	**328 335 273**
EBITA	*-519 146*	*-7 942 555*	*-21 237 413*
M050 - Finance costs	-6 284 698	1 219 207	2 480 740
Profit from Operations	**-6 803 844**	**-6 723 348**	**-18 756 673**
P050 - Restructuring costs	0	0	8 061 012
P040 - Discontinuation costs	0	0	389 522
P060 - Donation	-17 388 121	-104 000	-5 801 240
P020 - Grant – Land acquisition	-8 000 000	0	-8 000 000
P030 - Sales fauna & flora – L	-24 018 896	-2 844 000	-15 175 729
Profit from ordinary activities	**-56 210 861**	**-9 671 348**	**-39 283 108**
C010 - Abnormal expenses	0	0	144 000
S010 - Extraordinary income	-2 597 791	0	-12 029 228
S011 - Extraordinary flood grant	0	0	-18 000 000
T010 - Extraordinary expenses	6 428 538	0	14 241 441
T012 - KNP Fire Disaster Investigation	1 051 247	0	2 000 000
Net Profit	**-51 328 867**	**-9 671 348**	**-52 926 895**

accommodation, development of the transfrontier initiative, game capture, scientific research (US$3.5 million from the Mellon Foundation), veterinary medicines, anti-poaching activities and upgrading of staff accommodation. If these were to be paid from its operating account, the KNP would be forced to close down some of its non-profitable small private and bushveld camps to improve the bottom line. After spending 54 % of its budget on support services (salaries, statutory compliances, skills development fund, regional levies and others) very little money remains for capital projects and maintenance of infrastructure. It is unacceptable that the KNP spends a mere 15 % of its budget on its core business (conservation) and 31 % on tourism services (see Figure 3.3). Due to years of budget cutbacks there is a huge backlog on infrastructure maintenance and this threatens the attractiveness of its tourism facilities and services to tourists.

The reason why overall SANParks' profitability is not increasing lies in the management capabilities of business units, which resort under the Parks Department (19 parks excluding the KNP). Conservationists who have very elementary or no financial, business and tourism management skills manage most of these parks. With the exception of Table Mountain, Tsitsikamma, Augrabies, Kgalagadi and Addo, all 16 national parks under the Parks Department are currently showing huge losses. The total contribution to the revenue earnings of SANParks (see Table 3.7) by parks other than KNP amounts to R83 million in the pool of R317 million. This situation does not bode well for the future financial independence for SANParks. The new commercialization strategy is unlikely to succeed if managers who do not believe in "marrying" conservation with commercial principles continue to be heads of some of the loss-making national parks.

FIGURE 3.3:   KNP budget allocation, 2002/03
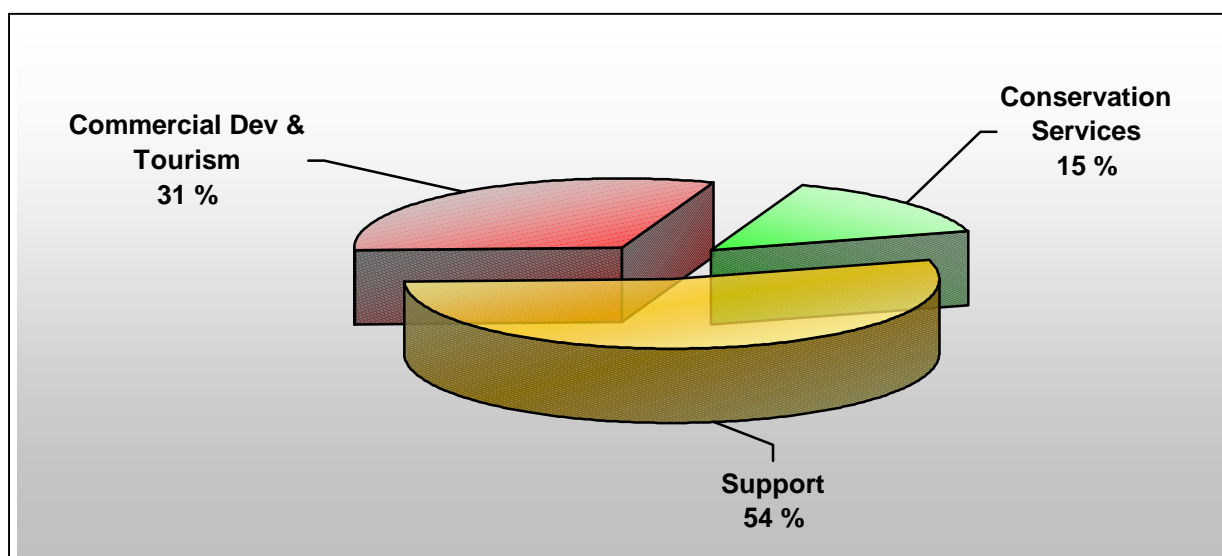
Adapted from Stevens, 2002

3.14 WILDERNESS QUALITIES AND TOURISM PLANNING

3.14.1 Era of the game rangers (1898-1950)

The early years of protected area tourism worldwide unfolded without an overall policy structure or goal and such a scenario constituted a threat to the environment in which tourism activities were to be established. According to the documented history of the KNP, the delivery of tourism services was influenced at different periods by various approaches based on the maintenance of wilderness qualities (Mabunda *et al.*, 2003).

During Stevenson Hamilton's administration (1902-1946), the *balance of nature* approach led to a *keep it simple and wild* wilderness philosophy. During the late 1940s the new Warden, Col. Sandenbergh, espoused the view that nature should be left undisturbed, human impact should be kept to the minimum and luxuries and comforts were unnecessary because the park was a place of rest away from the hustle and bustle of civilized life. He was most concerned about creating a tranquil atmosphere wherein people would experience peace and have refuge from the widespread squalor of urban life (Joubert, 1996a, 1986b).

3.14.2 Era of the scientists (1950-2003)

Stevenson-Hamilton also contributed to the retardation of tourism growth. His view was that tourists came for a wilderness experience and not for comfort or entertainment. He refused to upgrade accommodation or to provide conveniences because he believed that tourists came to the park for rustic and primitive natural experiences (Carruthers, 1995). This view became part of the founding philosophy of tourism in the park and still enjoys support from a segment of nature-conscious tourists, particularly among older clients.

The era of the Scientists commenced in the 1950s and brought another dimension to the debate on the maintenance of wilderness qualities of the park. The park's pioneer biologist, Dr T.G. Nel, perceived the existence of a 'paradox' in the thesis of *'preservation' vs. 'recreation'* in any national parks' conservation mandate. He believed that tourists to national parks have a deep-seated love of wild nature that should be honoured and that such sanctuaries should be prevented from degenerating into playgrounds for human beings. He compared national parks to an absolute sacred trust for the preservation of fauna and flora and not a holiday resort with hotels, cinemas, tennis courts and other amenities. He challenged the NPB to make a choice whether it wanted national parks to duplicate the features and entertainment of other resorts

or to preserve the parks for something distinct and better in the national life of South Africans. Although he was not totally opposed to the reality of tourism in the KNP, he disliked the centre-stage status granted to tourism on the pretext that it was the "*goose that was laying the golden egg"* and intimations that the park's success and future survival was dependent upon its ability to generate revenue through tourism (Joubert, 1986a, 1986b).

The views of Dr Rocco Knobel, Chief Director of the NPB and also NPB Board member during the 1950 to 1960s period, dominated prevalent philosophies on the direction that tourism was expected to take in the 1960s. According to Knobel, as quoted by Joubert (1986c), it is a half-truth that tourists go to the KNP to see animals in their natural surroundings, they could do that much cheaper and easier by going to a zoological garden…

> *"there is much more than that – there is that nostalgia about the romantic past of the Voortrekkers and the 1820 Settlers, the return to a little adventure, to a simple lifestyle, to camp fires that keep on burning, to bright starlit skies, to the inconvenience of roasting meat on glowing embers, to get away from neatly and fully set tables, to have eyes burning from mopani smoke, to feel the heat from fore and the cold from aft and so many things that are unique to the outdoors. Things of which we may never deprive our children…"* .

Dr Knobel's remarks add credence to the observations by Carruthers (1995) regarding the ideological agenda of promoting Afrikaner nationalism that was 'enveloped' in wildlife appreciation with the founding of the KNP. Tourism in KNP was also couched to promote a South African national identity within the framework of Afrikaner Nationalism and *baasskap* (Cock & Fig, 2000) as part of the apartheid national way of life.

The KNP was not to be developed into a commercialized recreation resort but a tranquil bushveld destination with an atmosphere that would be amenable to *geestelike verdieping* (spiritual enrichment) (Joubert, 1986b). The major values of conservation were scientific value, economic viability and cultural heritage. Subsequent development towards an increase in tourist accommodation was often subjected to strict control and sometimes refused. For example, restaurants, although necessary, were not encouraged because they promoted *verstedeliking* (urbanization). Tourists were encouraged to cook their own food over open fires. Paraffin lanterns were preferred to electricity in the huts. Tourist numbers were curtailed and heavy fines imposed on tourists whose behaviour was incongruent with rules and regulations of the park. Organized tours in big busses and conferences were discouraged because they interfered with the bookings of individual tourists (Joubert, 1986d). The lives of tourists in the park, in the researcher's view, were prescribed and controlled by the authorities with a myriad of laws that constituted overzealous officialdom.

3.14.3   Wilderness and management plans

During the 1980s ecologists worldwide, following the approach used in town planning, streamlined tourism development planning ideas into one policy document called a *Master Plan* (Eagles *et al.*, 2002). Generally speaking tourism planning has been defined as a process based on research and evaluation, which seeks to optimize the potential contribution of tourism to human welfare and environmental quality (Tosun & Jenkins, 1998). In protected area management this planning device was used to protect the wilderness qualities of the environment. It was during this era that Dr S.J.C. Joubert, an accomplished biologist and subsequently a KNP Director during the 1990s, began an arduous but successful project of documenting the management approaches and history of the park from its inception. Joubert's six volume Master Plan serves as the basis for newer management plans and without it the entire history of the Parks conservation and tourism activities would have been lost.

In ensuring that the concept of development planning is applied (through Master Plans) by protected areas, the IUCN strongly advises member countries to adopt zonation of recreational areas in their management plans to manage tourist activities and protect the environment against degradation (IUCN, 1994). As discussed earlier, wilderness areas – as part of a zoning system – and their management have been under discussion in the KNP over many decades. Earlier scientists of the KNP deserve praise for taking the first steps towards establishing a tourism management framework by introducing proposals for zoning of wilderness areas. Such wilderness areas are defined in the USA in terms of the Wilderness Act of 1964, as follows;

> "*A Wilderness, in contrast with those areas where man and his own works dominate the landscape, is hereby recognized as an area where the earth and its community of life are untrammelled by man, where man himself is a visitor who does not remain…*" (Cheney *et al.*, 1996)

When dealing with the issue of wilderness there are two important components of the concept that need to be understood. Firstly, there is the concept of wilderness zones and zoning of conservation areas to make provision for the preservation of wilderness areas. The protection of such declared wilderness areas from the impacts of man should be achieved through legislation. Unfortunately, the promulgation of such legislation has not yet been successful in South Africa. A major problem with demarcation and formal proclamation of such wilderness areas in a national park is that it creates an impression that other areas outside such wilderness areas may be developed or that they do not qualify as wilderness areas (Venter, 2001). The second point relates to the creation of the Recreational Opportunity Zones (ROZ) Plan, which is discussed in detail hereunder.

3.14.4   Recreational Opportunity Zones (ROZ) plan

It is imperative to know that "wilderness qu

alities" are not only found within the most pristine "untrammelled" wilderness areas; other areas within a national park which have tourism infrastructure and tourist traffic also have critical and important qualities of open space, wildlife, peace and serenity, natural sounds, all of which contribute to what collectively constitute "wilderness". Such attributes of wilderness need to be managed, or rather they need to be protected from the vagaries of humans by active management measures. The extent to which these wilderness attributes can be protected is enhanced by the development of a zoning plan, with different zones having different degrees of tourism impact and wilderness protection (see Annexure 4). In the KNP this has been achieved by the implementation of the ROZ Plan (Venter *et al.*, 1997).

To illustrate this principle and also how it may be applied in practice, the following example may be useful. In a rest camp wilderness qualities are promoted, *inter alia,* through the application of a specific type of architecture (thatched rondavels), siting of a camp (on the bank of a river or foot of a mountain), layout of the camp and gardens, as well as blending the rest camp with surrounding natural bush (Van Riet, 1987). The most recent trend is to do away with fencing of rest camps to enhance the experience of the wild. In areas used for trails and walks, different wilderness qualities apply and are maintained by preserving the wild and undeveloped character of the area, by providing a rustic experience and by restricting the number of tourists entering the area. Such areas are vitally important to:

- provide a pristine or primitive wilderness experience to tourists who prefer that kind of recreation; and
- keep future options open for use of the area in a manner that is compatible with a wilderness.

Even the use of directional signage in the KNP is influenced by the quest to protect the wilderness of the park to a large extent. Signs are produced from material taken from the surrounding environment. Stone pyramids or walls of about one meter in height are constructed to make them elephant-proof. Colours are selected to blend with the environment. No advertising billboards or bright neon lights are allowed because of the potential to erode wilderness qualities. The width of roads is narrower than town or city roads to give a tourist a different and pleasing experience compared to the freeways of Gauteng or other urban areas. The speed limit in the park is 50 km/h on tarred and 40km/h on gravel roads for the safety of animals and tourists but also for purposes of ensuring a tranquil atmosphere.

Early zoning efforts were designed to set aside extensive representative landscape types for ecosystems management (for management of rare species) and tourism development purposes. Wilderness areas were to be conserved for their own sake and kept "untouched" by man (Braack, 1997a). Over the years unsubstantiated perceptions, real or imagined, have emerged alluding that there is no part of the KNP or aspect of biodiversity that has been negatively affected by tourism development. Only three percent of the park, excluding the new concession areas, is directly affected by infrastructure such as camps, roads, dams, lookout points, picnic spots and other developments for tourists (Braack, 1997b). However, this view of no tourism impacts is challenged by literature that proves the existence of tourism impact on the environment (see 1.2).

Current reasoning is that biodiversity is not significantly affected by tourism and therefore there should be no reason to exclude humans from any area of the park. The current ROZ Plan management approach is to offer a broad range of wilderness qualities to all tourists depending on their expectations, levels of need *(and personal values in terms of this research study)*. Except for possible short-term biodiversity conservation or security reasons, there is no justification to exclude humans from any area or zone anywhere in the KNP. By managing the use of such areas the impact of humans can be controlled, limited or temporarily terminated. The whole of KNP was therefore zoned within a hierarchy of wilderness management areas that are based on their pristineness and potential use (Cheney *et al.*, 1996; Venter *et al.*, 1997). The ROZ Plan represents a major paradigm shift in the park's tourism development planning and wilderness management. Figure 3.4 shows the wilderness zones and tourism activities in such zones while details of related activities are attached as in Annexure 4.

3.14.5 Spiritual and experiential qualities

Spiritual and experiential qualities of the wilderness refer to the ambience and spirit of a place that are influenced by the physical characteristics of the area and the potential activities and experiences associated with such an area (Cheney *et al.*, 1996). It is a well-known fact that staying in a large rest camp in the KNP is an unforgettable experience for certain categories of tourists. Other tourists (*depending on their personal values* and preferences) prefer more rustic and primitive experiences and tend to shun the larger rest camps and main tourists roads (Venter *et al.*, 1997). One of the objectives in this study is to measure the values, preferences and attitudes of tourists that make them decide on the KNP as their holiday destination (see 4.3). Such information will bolster the drive to continue protecting wilderness qualities because of the role that they might be playing in the choice and enjoyment of the park's experience by tourists.

FIGURE 3.4:   Recreational Opportunity Zoning map of the KNP
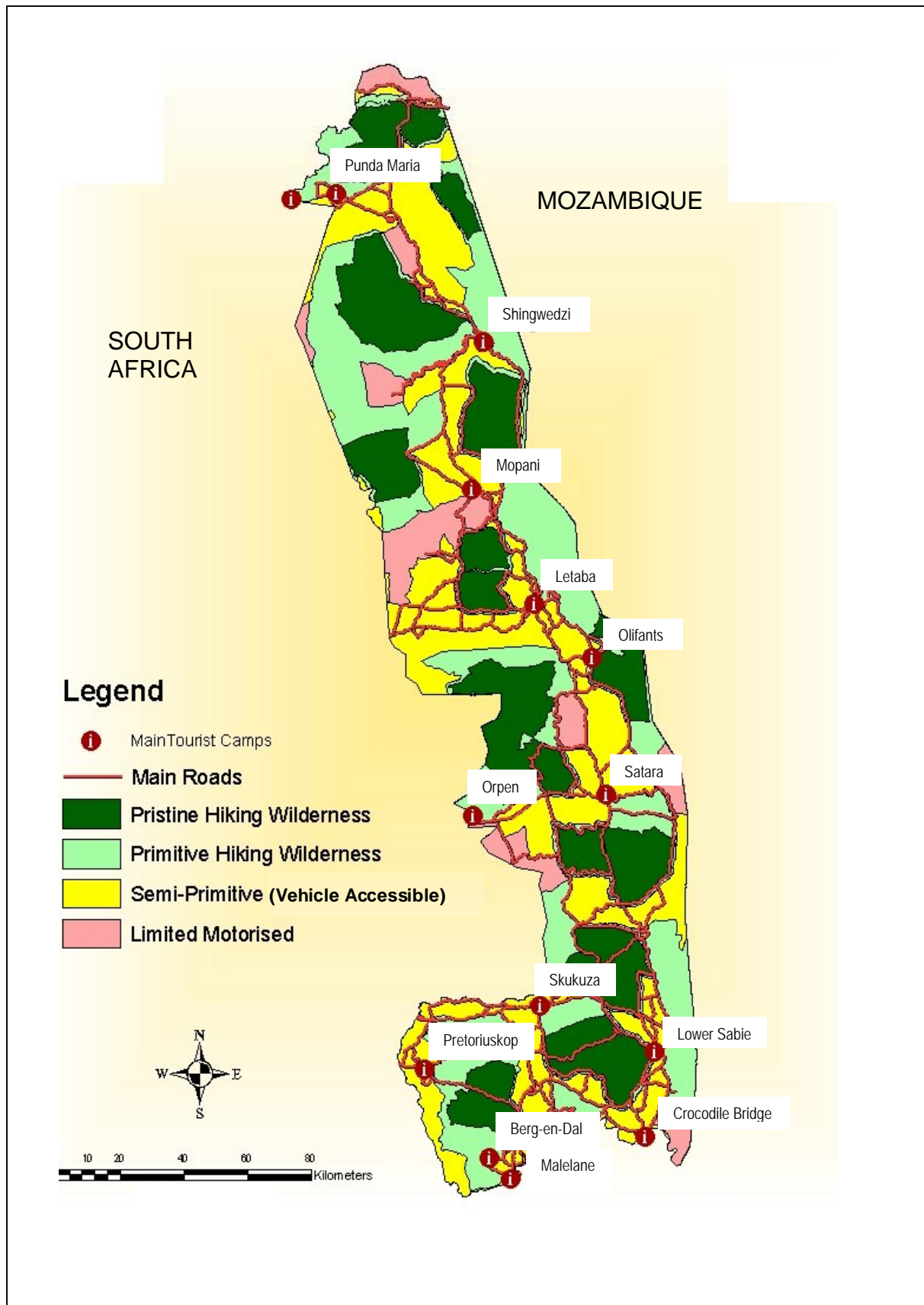
Adapted from Braack, 1997b

According to the researcher the ROZ Plan in itself or applied in isolation from other essential components of tourism does not constitute a tourism management plan but rather is one of the planning tools available to a park manager to be used in tourism development planning. Nonetheless, the ROZ Plan has managed to keep the KNP in a state of relative ecological health that contributes to it being a much sought-after destination.

3.15   RELATIONSHIP WITH NEIGHBOURING COMMUNITIES

Protected areas the world over, through the leadership of the IUCN, have come to accept that adjacent communities are legitimate partners in the conservation and tourism activities of parks (SANParks, 2000). Many pieces of legislation establishing protected areas explicitly embrace adjacent communities as stakeholders and beneficiaries of proceeds accruing from conservation activities. There exist very few systems that still advocate "parks without people" (IUCN, 1994). The new Protected Areas Bill of 2003 makes it compulsory for Park authorities to embrace communities living adjacent to them in formal partnership relationships (see 2.8.2).

One of the major problems facing the KNP today is its lack of legitimacy amongst the three million black people living on its doorstep, who continue to "smell the cherry" from a distance (Makoe, 2002). Communities, whether living in the Park's staff villages or outside the park, have seldom been involved in decision-making processes (Cock & Koch, 1994). Their experience of the Park evokes episodes of running for their lives from escaped problem animals and runaway fires. For more than a century different Park authorities have regarded communities living adjacent to it as potential poachers and this relationship has bred animosity between the Park and its neighbours (Makoe, 2002). Denial by Park management that such uneasy relationships exist between the Park and its adjacent communities further compounded the problem (Cock & Fig, 2000). There are many issues concerning the KNP that remain a concern for adjoining communities.

Among the issues that disturb neighbouring communities is the economic value that they believe they should be deriving from the Park (SANParks, 2000). Provision of service and goods were traditionally awarded on tender to large urban-based white-owned corporations to the total exclusion of the neighbouring black communities (Cock & Koch, 1994). Economic opportunities and contracts were – and still are – not entirely open to black entrepreneurs, manufacturers, consultants and suppliers of goods and services, although black enterprises comply with required standards (Cock & Fig, 2000).

According to Blignaut & Moolman (2004), the political legacy of apartheid might have ceased but economic and environmental consequences are still prevalent. They cite the poverty-stricken and environmentally degraded area of Bushbuckridge, which borders the KNP, as still excluded from the benefits accruing from the KNP. They suggest that the KNP management should consider broadening the conservation corridor by incorporating the Bushbuckridge communal land as an IUCN Category VI protected area. Such a protected area will allow sustainable resource harvesting by communities within a proper managerial and institutional system to promote trade in ecosystem goods and services.

The KNP has a long history of animosity between itself and neighbouring communities for a variety of historical and current reasons (Pollard *et al.*, 2003). The past livestock control policies and conservation laws that rendered black people liable for arrest if found in possession of wildlife outside reserves, created animosity between the Park and its neighbouring communities (Davenport & Saunders, 2000). The so-called "betterment schemes" of the previous government imposed crippling restrictions on black people's livestock and agricultural production and helped to undermine the African tradition of conservation and agriculture (Pollard *et al.*, 2003).

An emerging view among conservationists, supported by good business practice, is that successful management of protected areas must include the cooperation and support of local people. This view is strongly supported by Blignaut & Moolman (2004) as quoted above. The exclusion of people who live adjacent to protected areas from sustainable use of natural resources without providing them with alternatives is increasingly viewed as politically unfeasible and is increasing tensions between the KNP and its neighbours (Blignaut & Moolman, 2004; SANParks, 2000). In many countries the response of protected areas to this challenge has been the linkage of biological diversity in protected areas with local social and economic development (Matawonyika, 1989; Watson & Sanders, 1997).

While the core objective of such projects is protected area conservation, they aim to achieve their goals by promoting socio-economic development and providing local people with alternative income sources that do not threaten to deplete the plants and animals within parks. Such projects, where they are in operation, have become the vanguard of what will undoubtedly develop into a broad array of initiatives attempting to link conservation and socio-economic development (Blignaut & Moolman, 2004). Examples of such programmes may include, *inter alia,* agro-forestry, wildlife utilization, irrigation and water management, soil enhancement and erosion control and the improvement of agricultural yields in general (Brandon & Wells, 1992).

Unfortunately there is very little, if any, similar park-initiated or sponsored activities happening along the western and southern boundaries of the KNP. The role and success of the Social Ecology division introduced in 1995 will need to be evaluated to determine its impact so as to effect adjustments for future success (see Survey on Relationships with Adjacent Communities in Chapter 5).

The Centre for Wildlife Management at the University of Pretoria, commissioned Herman Els to conduct a study among the black employees of the KNP between May and July 1994 (Els, 1994).   The objective of the study was to measure existing value-judgements of black employees concerning certain aspects of nature and nature conservation. Another objective was to indicate the degree in which the value-judgements concerning nature and nature conservation of black employees of the KNP differed from those existing in black communities adjacent to the KNP. Information about value judgements of the black communities adjacent to the KNP has been gathered since 1991 as part of a larger research project in the Mnisi tribal authority area (Mhala District: Limpopo Province). The University of Pretoria study found that:

- selected trees (Kiaat, Maroela, Groenklapper, Rooi-Essenhout (Mahogany) and Hardekool) are regarded as beautiful because of their usefulness for subsistence (e.g. their fruit, shade and as a source of energy). In this regard the response of KNP employees was in agreement with those of people living in adjacent rural areas.

- respondents were almost equally divided on the question if man should accept responsibility for the care of the above trees (No – 46,6 %; Yes – 51,4 %).

- respondents regarded domestic animals as beautiful and not dangerous and also considered it man's responsibility to care for these animals.

- an overwhelming majority of respondents considered lions, elephants, hippos, buffalo, blue wildebeest, eland and crocodiles as dangerous animals. Consequently they maintained that man has no reason to accept responsibility for the care (conservation) of these animals.

- almost all (97,8 %) the respondents indicated that man should not care for wild animals as he should for domestic animals.

- overall, the research indicated that there is no real difference between black employees in the rest camps and the black communities adjacent to the KNP regarding perceptions and value-judgements of nature and nature conservation in the KNP (Els, 1994).

The conclusion of the study was that the KNP cares more for wild animals and the rich white tourists who visited the park. Communities and black employees resented the fact that they were not allowed to harvest firewood, medicinal plants and meat from the Park. They also felt aggrieved that wild animals, which destroyed their crops, had grass to eat while their cattle starved to death during drought periods. The study concluded that it would benefit the park to take comprehensive steps to communicate its mission to its own personnel as well as to the adjacent rural communities and to become involved in rural socio-economic development. This was subsequently done through the introduction of a Social Ecology division in 1995 (SANParks, 2000). Involving communities in tourism development could improve their economic situation and could be the only long-term value-added sustainable development path open for the future survival of the KNP.

Another important milestone in the evolution of tourism development in the KNP was the Park's effort to provide and maintain tourism infrastructure and facilities.

3.16   PARK INFRASTRUCTURE AND MAINTENANCE

On his retirement in 1945 Stevenson-Hamilton conceded that the KNP was never in a sound financial position to build rest camps and roads and never had a development plan that was ecologically friendly. This was so because *"in the early days we lived perforce from hand to mouth"*. Rest camps were not well sited and were built in the middle of the Park. He advised that, in future, new camps and hotels should be built on the periphery or outside the western boundary of the KNP with tourists being encouraged to move from west to east rather than the current south-north movement (Joubert, 1986a).

Due to the increase of tourist numbers after World War II the Board decided in the late fifties that tourism infrastructure should be upgraded and expanded to accommodate more tourists. It was then decided to establish a Division of the Engineer, later renamed Technical Services. The first park engineer, Albert Kuschke, was appointed in 1958 and the division's budget was £58 000. This budget has grown dramatically through the years and by the 1990s it amounted to R60 million per annum (KNP, 1990). The mandate of the technical division was, and still remains, management of capital projects (buildings and roads) and maintenance of infrastructure, equipment, plant and vehicles (lately on an outsourced basis) (Laubscher, 1999).

The construction and maintenance of buildings and roads infrastructure, water and sewage lines and camp fences are the most critical functions supporting tourism services in the Park.

The KNP has more than 3 000 buildings, 12 water purification plants, 45 boreholes, 11 solid waste sites, 1 743 km of gravel tourist roads, 4 900 km fire break roads and 885 km of tar roads (KNP, 2003). Without this infrastructure there would be serious negative impact on the tourists' wilderness experience.

Most of the camps in KNP were constructed between 1928 and 1991 when tourists were fewer. Many of these facilities are now aging (see Annexure 5).

Table 3.8 shows the total values, calculated according to the World Bank norms and maintenance benchmarks, and the 2002/03 KNP budget for infrastructure. From the allocated budget of R41 million the KNP experiences a shortfall of R32,5 million for 2002/03 financial year.

TABLE 3.8:   KNP infrastructure replacement values, maintenance benchmarks and current budget, 2002/03

INFRASTRUCTURE	REPLACEMENT VALUE	MAINTENANCE P.A.	KNP BUDGET
Roads and bridges	R 996 million	2 %: R 19 million	R 14 million
Tourist & staff accommodation	R 465 million	7-10 %: R 33-R46 million	R 27 million
Support infrastructure (underground pipelines water, sewage and electricity)	R 80 million	7-10 %: R 5,6 – R 8 million	(Included in the R27 million budget above)
TOTAL	R 1 500 million	R 73,5 million (taken the highest figures)	R 41 million

Adapted from Schraader, 2003

Apart from the accumulated maintenance backlog, the KNP roads maintenance budget lags behind with R54 million. Most roads, sewage and water reticulation systems in the KNP have reached the end of their life cycles and need reconstruction. Due to shortages of funds emanating from decades of under-funding, successive Park Wardens took suicidal decisions and applied cutbacks on maintenance of fixed infrastructure and refurbishment of facilities. Funds set aside for this purpose were grossly insufficient given the extent of the maintenance scope. There have been many complaints induced by the aging furniture, linen and other equipment that affect tourists' enjoyment. The total maintenance and refurbishment backlog in the KNP stands at R 120 million (plus inflation and rising building costs) (Stevens, 2002; Schraader, 2003). Infrastructure is an important element of product and services rendered by

a tourism destination. Should infrastructure be allowed to deteriorate, the attractiveness of a destination is seriously debilitated (Eagles *et al.*, 2001).

The development of a national park product cycle takes decades to blossom into a profitable tourism venture. For example, Addo National Park near Port Elizabeth was established in 1931 and after 72 years it has recently managed to break even. Bontebok National Park near Swellendam was established in 1931, Mountain Zebra National Park in 1937, Augrabies National Park in 1966, to mention but a few. All these national parks have only begun realising financial surpluses recently but they have played a very important role in conserving representative biomes or landscapes that occur in South Africa only.

In the researcher's view there is a need to evaluate a national park's success in terms of a triple bottom line, *i.e.* environmentally, socially and financially. To use the financial yardstick alone is misleading and simplistic. Society does not create national parks for profit purposes but to conserve natural, cultural and historical value systems. Financial prudence in terms of resource utilization should remain obligatory for a national park but not as a measurement of success or failure. The state, on behalf of the nation, will always have a financial contribution role to play. National parks should consider adopting business strategies and marketing strategies to survive and thrive.

The lack of a marketing track record in the KNP in particular and SANParks in general has negatively influenced tourism growth to a considerable level.

3.17 MARKETING RESEARCH AND STRATEGY

3.17.1 Public sector and marketing

Owing to the long history of financing through government grants, the policy of pricing and revenue generation in national parks and protected areas is seriously neglected in the public sector (Laarman & Gregersin, 1996). Also state-owned protected areas and conservation agencies did not pay adequate attention to marketing their products or experiences to their prospective and current clients. National parks were not managed on business principles until very recently, and only after governments worldwide began instituting severe cutbacks on the subsidy grants allocated by treasury departments (Van Sickle & Eagles, 1998).

Diggines (1998) found that, although the KNP had aggregates of the marketing function residing under the jurisdiction of the Manager for Public Relations and Marketing, in reality professional marketing functions were non-existent. It had always been the belief of previous and current KNP managers that, because of its international conservation reputation, the KNP would market itself. To a limited extent it did market itself, although in recent times the KNP has faced tough competition from provincial conservation agencies such as the North-West Parks & Tourism Board, KZN Wildlife and private nature reserves (see 3.8). The theoretical management framework in Chapter 2 (see 2.9.1) suggests that the KNP should consider developing a marketing plan based on research or surveys of tourist needs. Surveys are an essential prerequisite for drawing up a marketing plan.

3.17.2   Tourist surveys

The management of the KNP is not aware of its tourist profiles because it does not conduct surveys to obtain information that will help it to adequately plan for products and services to meet tourist expectations. No effort is made to analyse the guest cards filled in at the end of each visit and even if they would be analysed the results would be flawed due to not following sampling or statistical procedures. Protected area managers must conduct market research in order to understand their tourist profiles. Examples of relevant questions asked by planners should include the following:

- who are the tourists and what are their characteristics?
- where do they come from and how did they get here?
- what percentage of tourists is domestic and international?
- how long do they stay?
- how many tourists are currently visiting the park?
- what do they do during their stay?
- what attitudes and expectations do they have?
- what would tourists like to see?
- what motivated them to choose a specific protected area as their destination?
- how satisfied are they with their visit? (Eagles *et al.*, 2001:54)[33].

Learning about and analysing tourist needs and expectations better enables park managers to provide satisfying experiences that will meet tourist expectations. Focusing on specific market segments enables park managers to target tourists more effectively. It must be pointed out,

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[33] The tourist survey conducted in this study used the variables quoted by Eagles *et al.*, 2001:54 and revealed interesting results (see Chapter 4).

though, that tourists may express a desire for a particular experience, which may be incompatible with an area's image. The development of such infrastructure could be in conflict with the objectives of the protected area (Eagles, 1995b). This is the reason, for instance, why there are no casinos or hot-air balloons in the KNP.

Surveys can reveal important information to a park manager, such as who is not visiting and why (e.g. there are no more than 12 % black visitors to national parks in South Africa). Potential tourism markets can be identified for purposes of expansion. Surveys can also be useful to anticipate future conditions and trends. Identification of the types of activities that are popular with tourists enables park managers to identify appropriate sources of advertising. Magazines and journals such as *Getaway,* for example, may be a good medium of advertising. Upscale travel supplements in newspapers are other sources. Planners and managers can collaborate with tourism operators to develop brochures that should indicate the purpose and uniqueness of the destination (Eagles *et al.*, 2000). It is vital for a park to understand the behaviour of its consumers to be able to plan appropriately.

3.17.3   Consumer marketing

Successful organizations require extensive information on consumer behaviour and conduct extensive research to achieve this. *Consumer behaviour is the study of individuals, groups, or organizations and the processes they use to select, secure, use and dispose of products, services, experiences or ideas to satisfy needs and the impact that these processes have on the consumer and society* (Hawkins *et al.*, 2001:7).

Personal values play an important role in an individual's lifestyle and provide a direct and useful explanation of the multitude of interests, outlooks on life, consumption priorities and activities that determine lifestyle. Personal values are likely to determine what attributes a consumer will seek out in a product or service and are partly responsible for the formation of attitudes towards brands, companies, establishments and market place alternatives (Muller, 1991). In the case of international (and local) tourism it can be expected that values determine a consumer's choice of vacation destination and other economic behaviour related to foreign travel for pleasure. A concept of personal values will give tourism planners who work in global tourism markets, travel agents, tourists and destinations like protected areas a means of identifying the target segment through profiles that match attributes to personal values. The relationship between personal values and tourists' behaviour has tangible positive implications for marketing practitioners and policy-makers in the tourism industry because

value orientations predicts the importance people attach to specific destinations (Mellot, 1993). This is the reason behind the use of Value-laddering interviews in 4.3 if this study,

Due to the lack of a management framework and the non-existence of market research on the behaviour of its consumers, the KNP is missing an opportunity to draw profiles of its clients and market segment for purposes of mapping products and services to satisfy the needs of such consumers. Any tourism management framework designed for the KNP should include as one of its core elements market research that emphasizes consumer behaviour analysis as a basis for a continuous marketing strategy. This is because of the reality of dynamic environments, changing clientele profiles and the futuristic nature of tourism. Such a marketing approach may throw light on the reasons why people of different market segments visit or do not visit the KNP and help to strategically position the Park to meet and satisfy the needs of its clients. It would further help the KNP to strategically position itself as a preferred destination within a broader destination-marketing context and global competition.

3.18   CONCLUSION

In this chapter the historical overview of tourism growth in the KNP was discussed. SANParks and KNP organizational structures charged with tourism management and their relationships with other departments and divisions were also discussed. From this historical and organizational structure overview it is evident that tourist numbers have increased over the years and that the KNP has been and is still struggling in managing and delivering tourism services with unavoidable negative consequences on the quality of the products and services offered. There is a lack of an integrated approach to tourism management in relation to conservation/wilderness activities. Many of the employees responsible for tourism have no formal training in tourism management and contribute to the lack of quality assurance in products and services rendered. Generally the business performance of SANParks has been poor and so is that of the KNP. Due to an inability to raise sufficient revenue from tourism and government sources the Park is unable to implement cyclic maintenance on its infrastructure and refurbishment of tourist facilities. The lack of maintenance has seriously debilitated the attractiveness of the KNP as an overnight destination although, because of its global reputation and local brand loyalty, it can still draw tourists from South Africa and all over the world. The adoption of commercialization as a conservation strategy seems to have been a step in the right direction and there are strong indications that the initiative will pay dividends. However, there are some concerns over the implementation process of this new strategy and its effective management in a practical context.

Concerns have been expressed on the lack of meaningful and visible community involvement in the tourism activities of the KNP when compared to the tourism industry norms. If the Park's future is to be secured, management should consider implementing innovative means of constructive engagement with the communities to ensure that benefits accruing from conservation activities are equitably shared.

Both the mainstream tourism industry and protected areas worldwide and the KNP in particular have had a blind spot for the emerging protected area tourism phenomenon. The complexity of tourism management in the KNP is often underestimated. Managers should balance environmental protection with tourist use of the resources. However, they (managers) are struggling to deal with the demands of tourists, local residents' participation, regional interests, alignment with the national government objectives and the private tourism industry without a theoretical reference and management skills base. If the KNP and other protected areas are to succeed in managing tourism in sensitive areas, they need to establish criteria and indicators to manage tourism impacts on the environment. The current tourism facilities and tourist satisfaction levels will now be measured in Chapter 4 to establish tourism and recreational values for improvement by the proposed management framework.

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 sample[34] 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.

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[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 coefficients[35]. 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

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[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 commercial-ization, 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

Strongly disagree	☹	🙁	😐	☺	🙂	Strongly agree
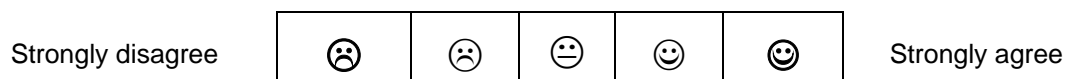
It was decided to use a five-point scale rather than a seven-point scale in the present study and also to use smiling/scowling faces to indicate degree of agreement to the item content. Several participants in the pilot studies complained that the questionnaire used was too long and a seven-point scale 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	N	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 plots[36] 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

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[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**
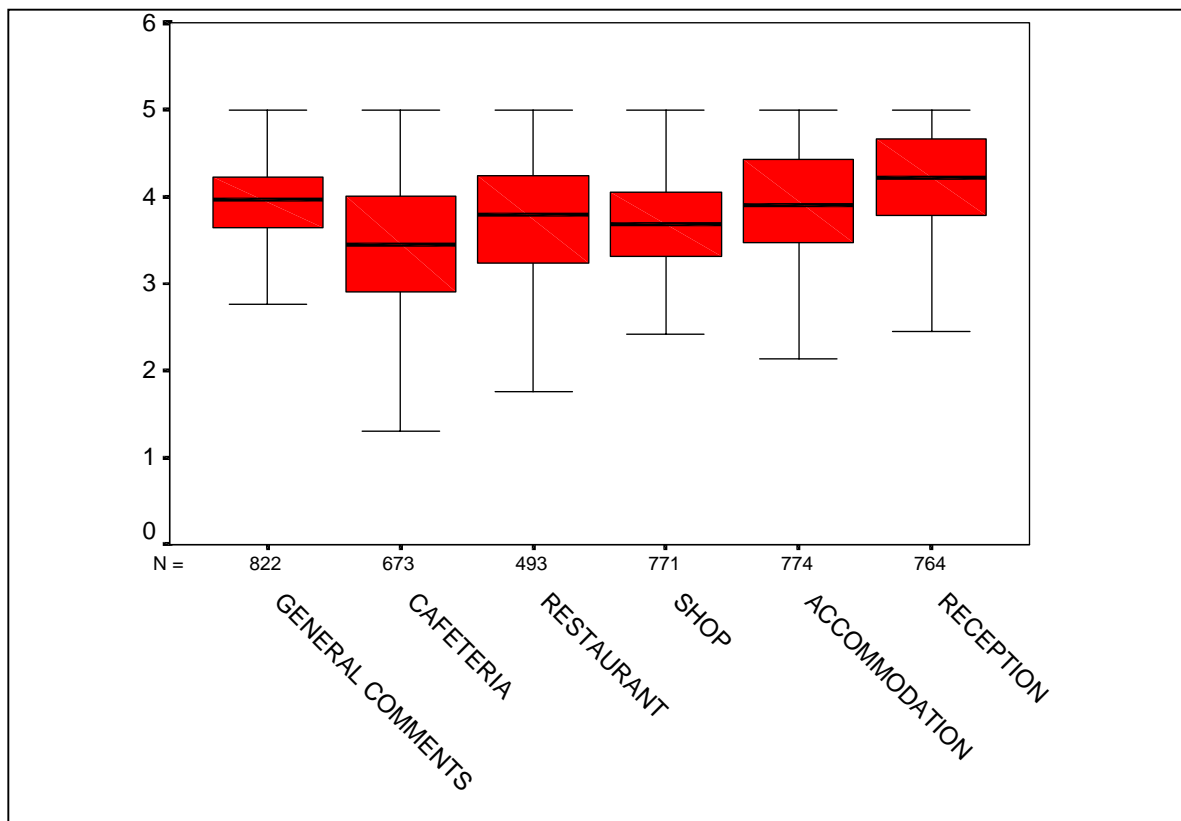
the cafeteria, restaurant and to a certain extent the shop merchandise were the most unsatisfactory variables. What makes it worse is that the KNP outsourced these services on 15 September 2001 to try and improve standards and service. Although the accommodation variable is average, there are concerns 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 adjustment[37] 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:

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[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

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[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
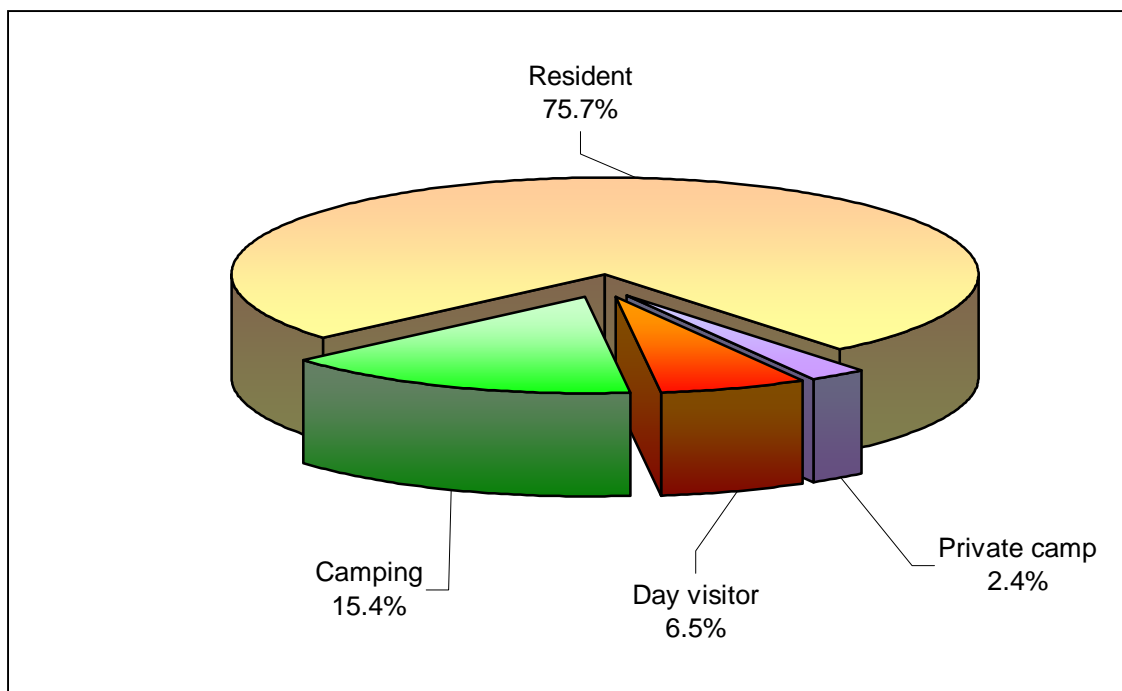
4.1.4.3   Number of nights stayed at the camp

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
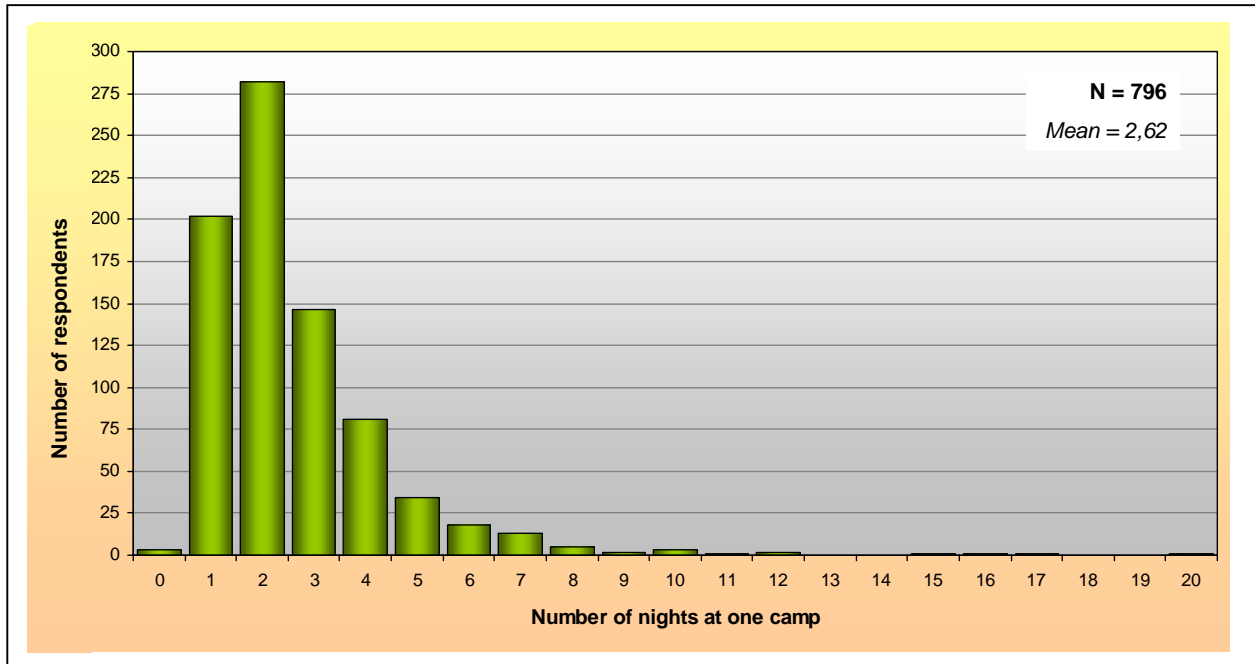
4.1.4.4   *Number of nights stayed in KNP during present visit*

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
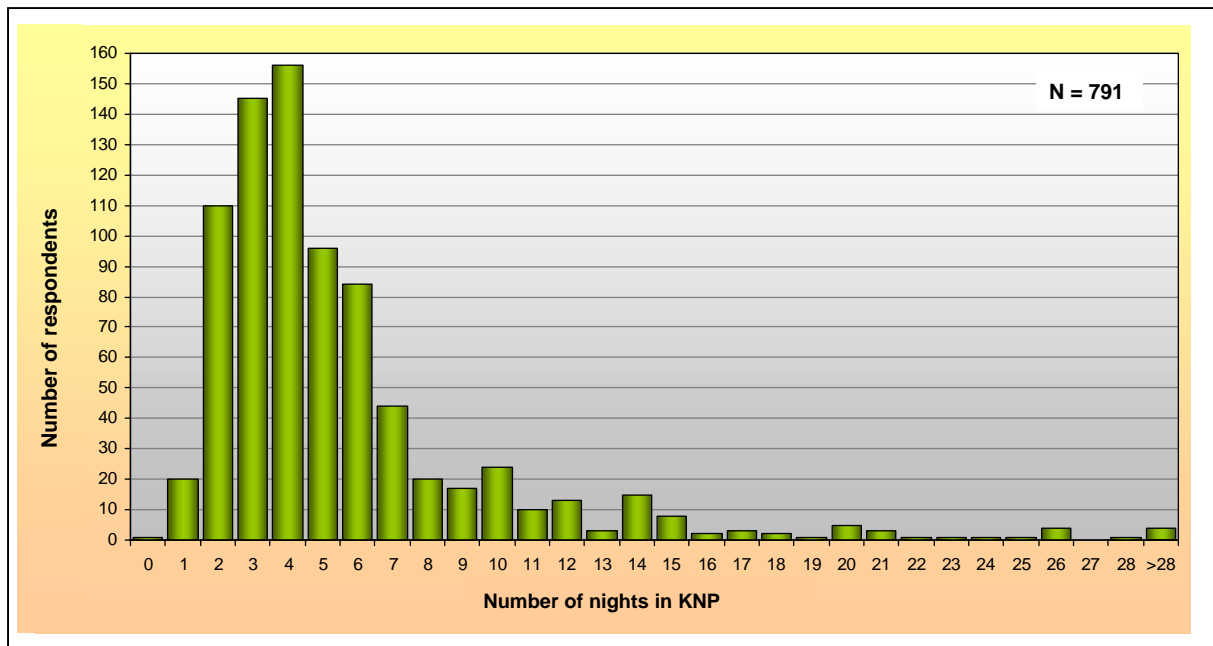
FIGURE 4.5: Size of party visiting the KNP
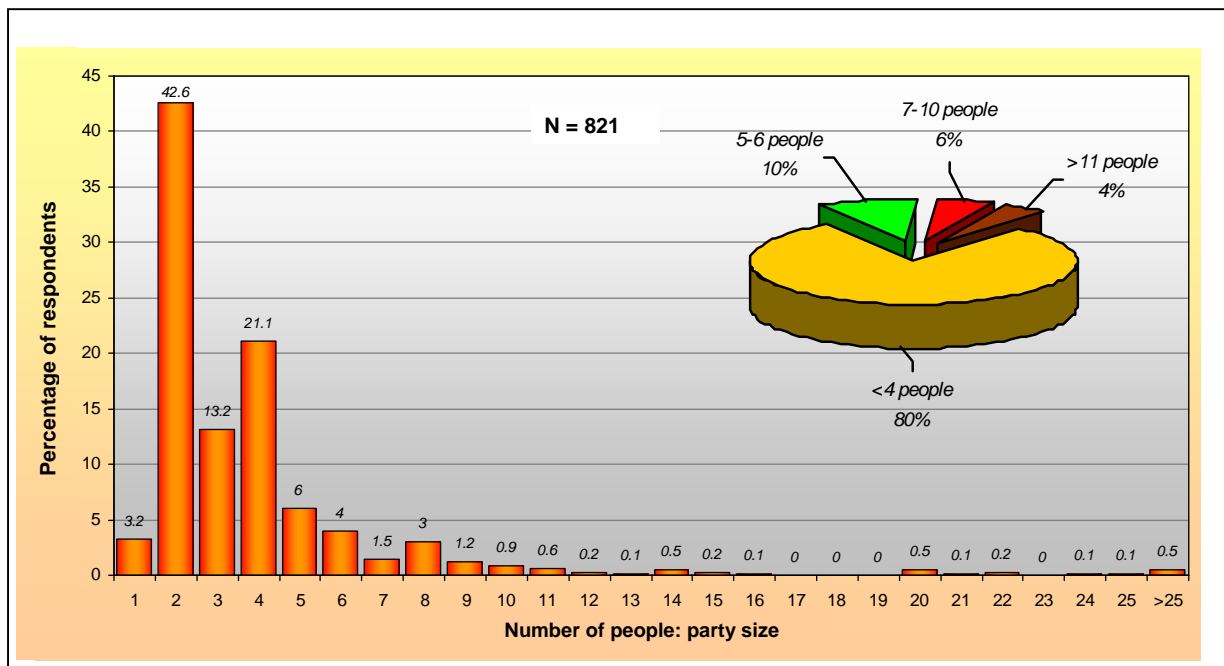
4.1.4.6   *Frequency of visits to the KNP*

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
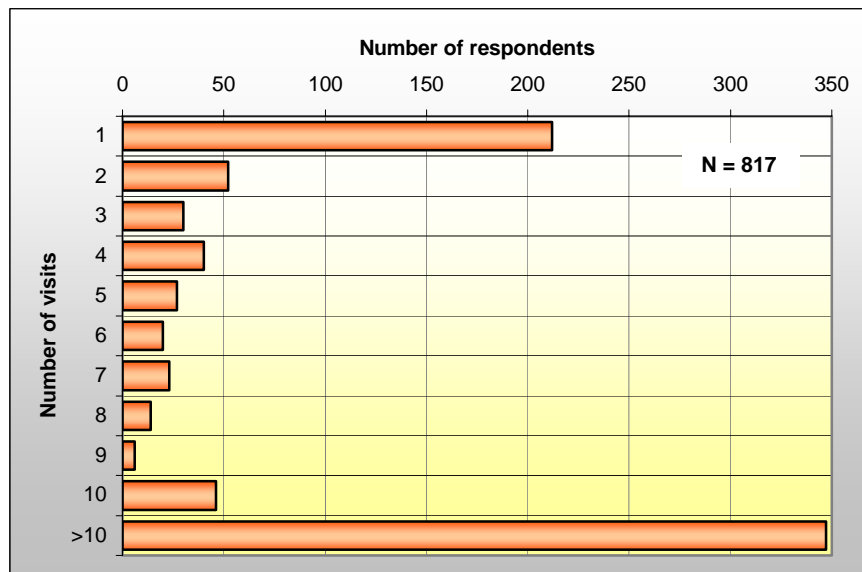
4.1.4.7   Age and gender of the participants

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)
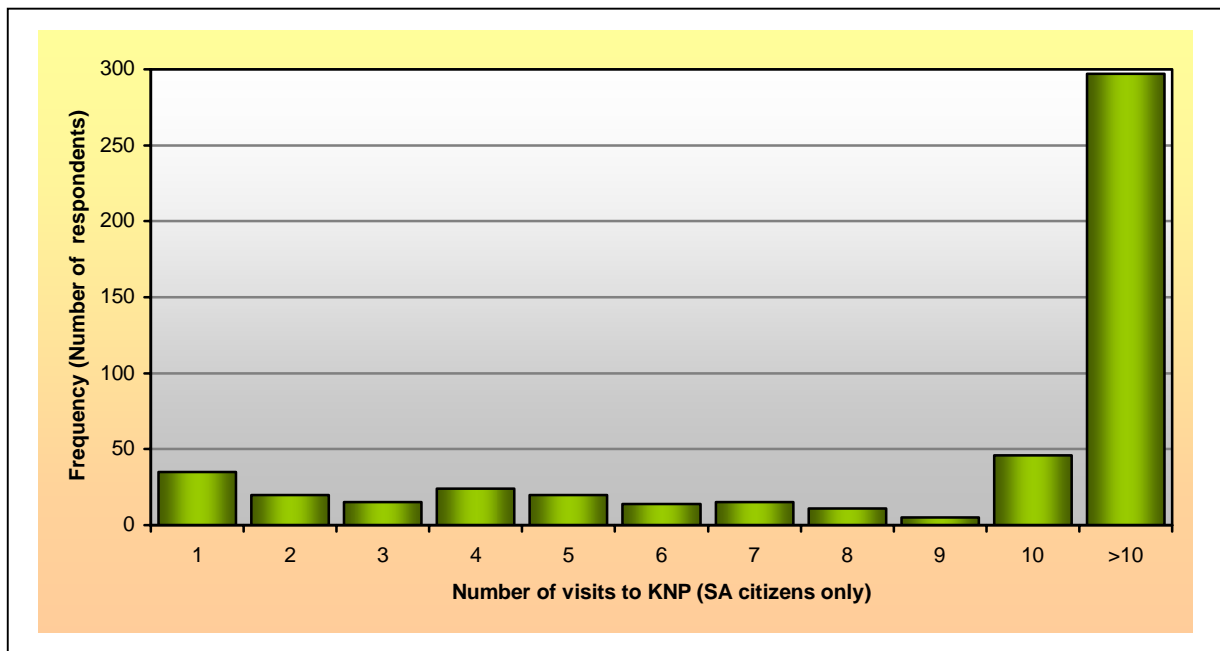
TABLE 4.6:   Age distribution of the participants

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 (continued)	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 *(continued)*	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*"
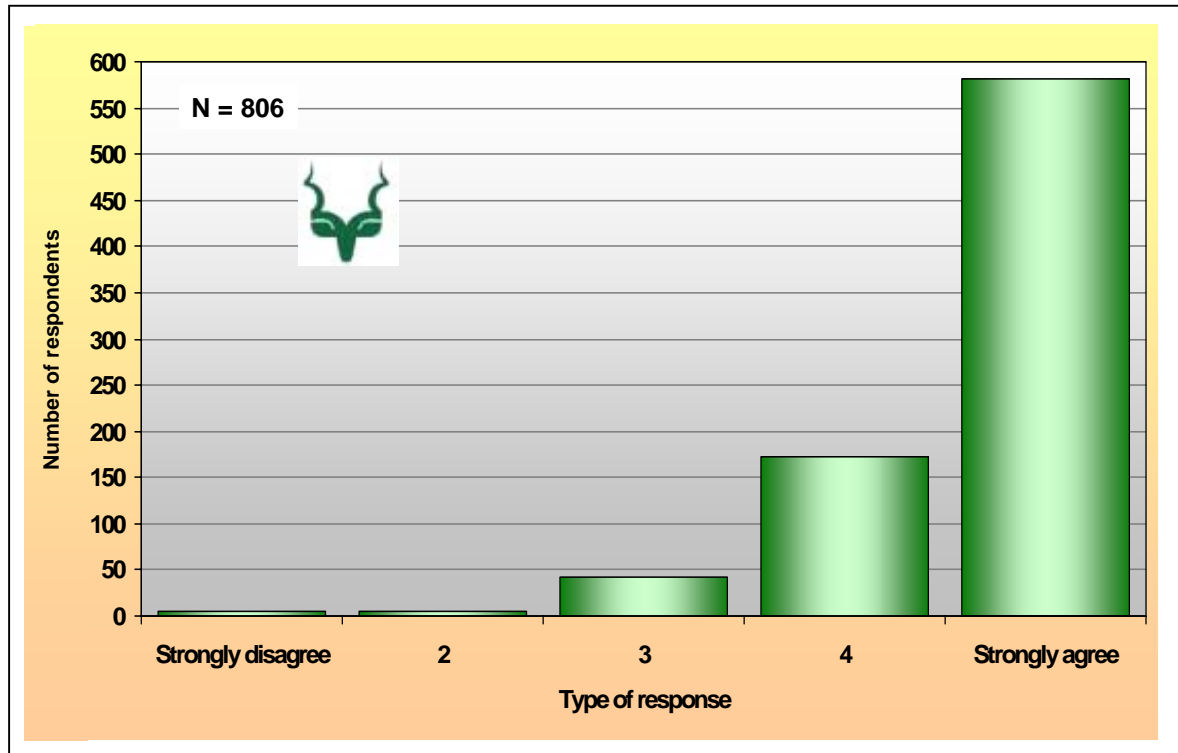
FIGURE 4.9:   Responses of the total sample to "*commercialization has a positive effect from the tourists' point of view*"
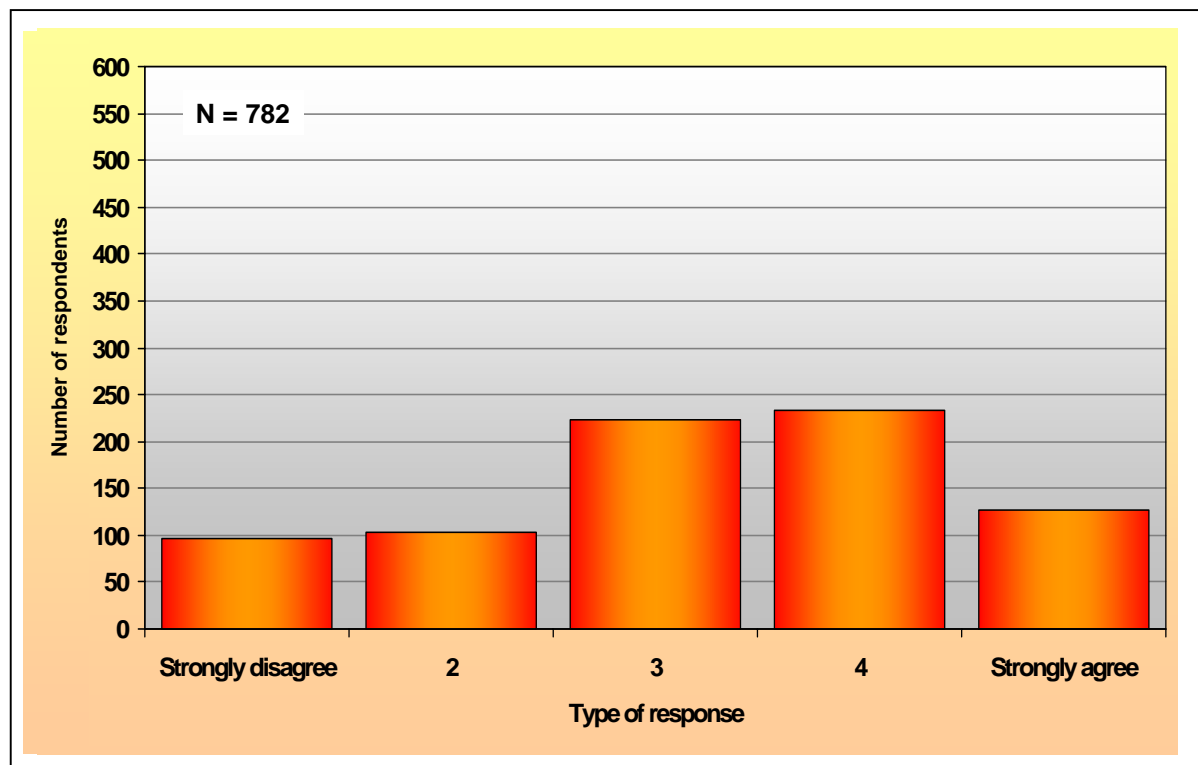
FIGURE 4.10:   Responses of the total sample to "*visible commercialization is destroying the Kruger experience*"
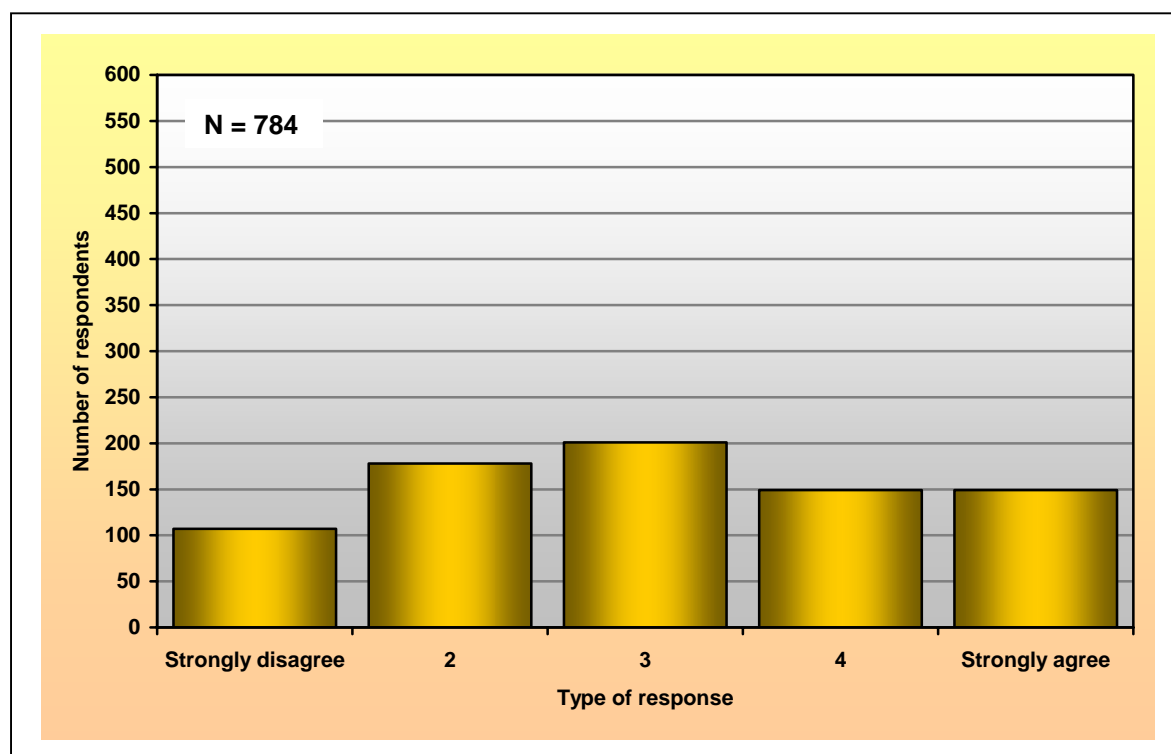
From the results given in Table 4.14 and Figures 4.9 and 4.10, it is clear that tourists feel very strongly that the identity of the KNP should be retained. In fact, 93,5 % of the participants agreed or strongly agreed with the statement. This sentiment was particularly strong among South African citizens 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*"
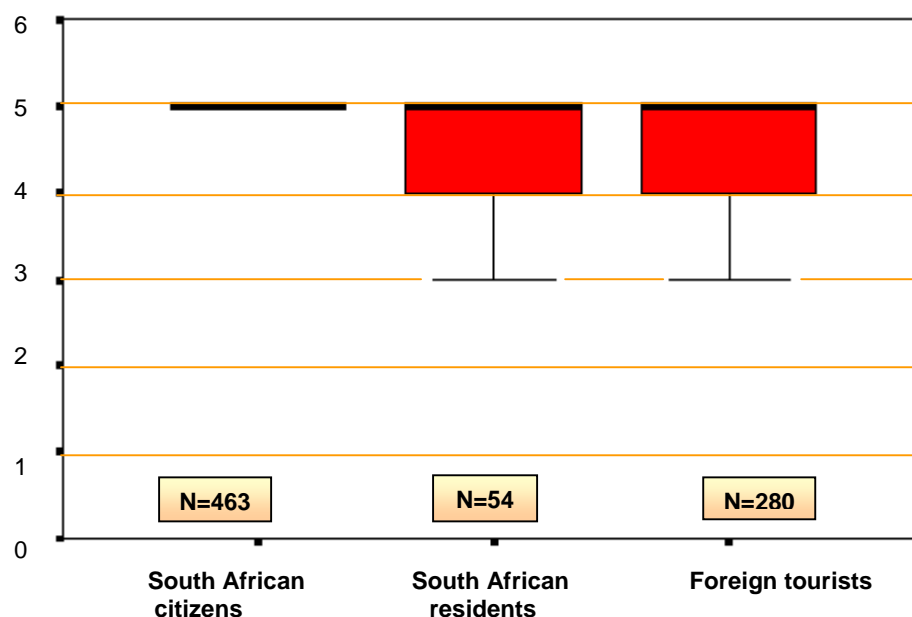
The distributions of the responses to the individual items in the questionnaire are given In Appendix 7. It should be noted that five tourists to Biyamiti indicated that they were reporting on the cafeteria at the camp, two Biyamiti tourists reported on its restaurant and one reported on its shop. These 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 orderned[39] 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.

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[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 repondents' 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
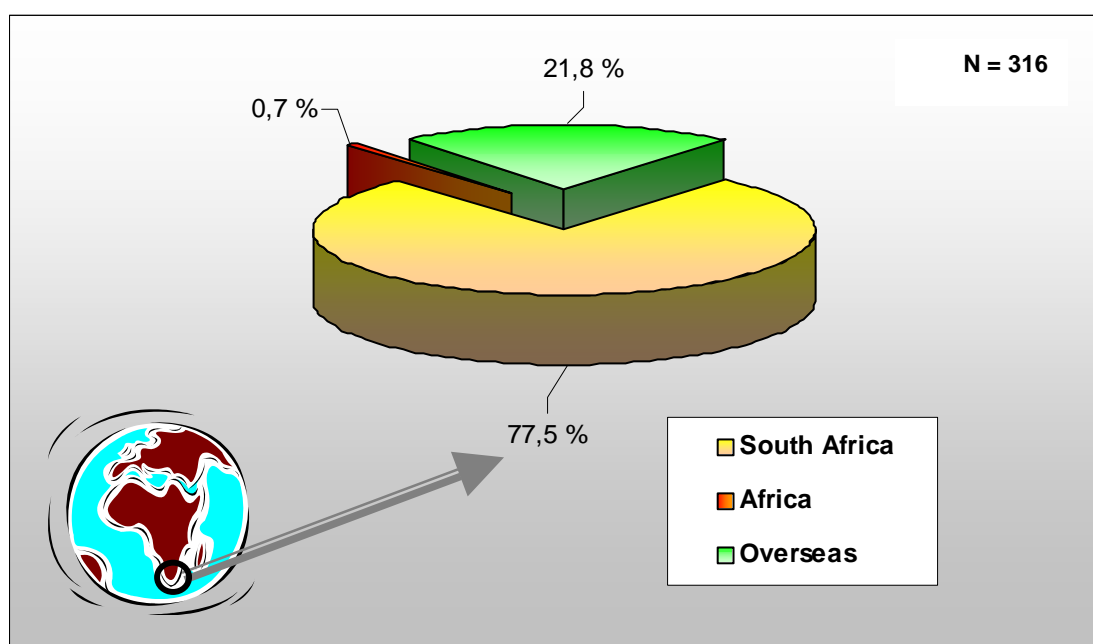
4.2.4.2   Size of touring party

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
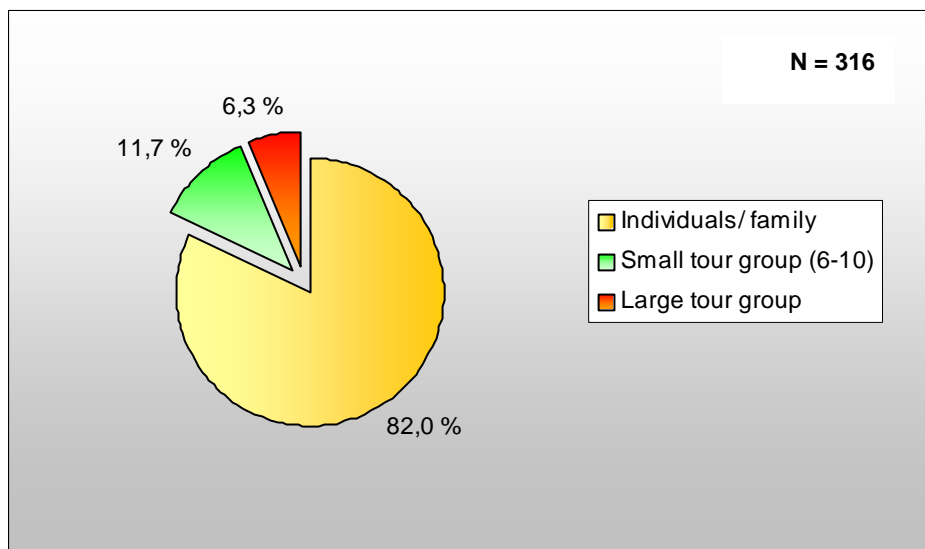
4.2.4.3   *Frequency of visits*

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
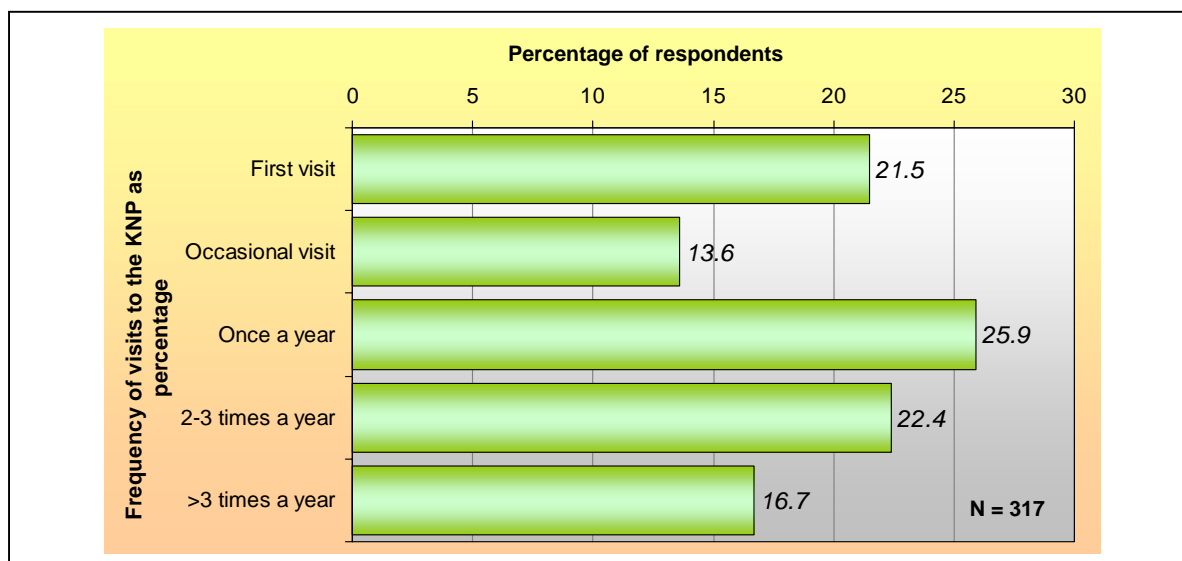
4.2.4.4   Camps

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

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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
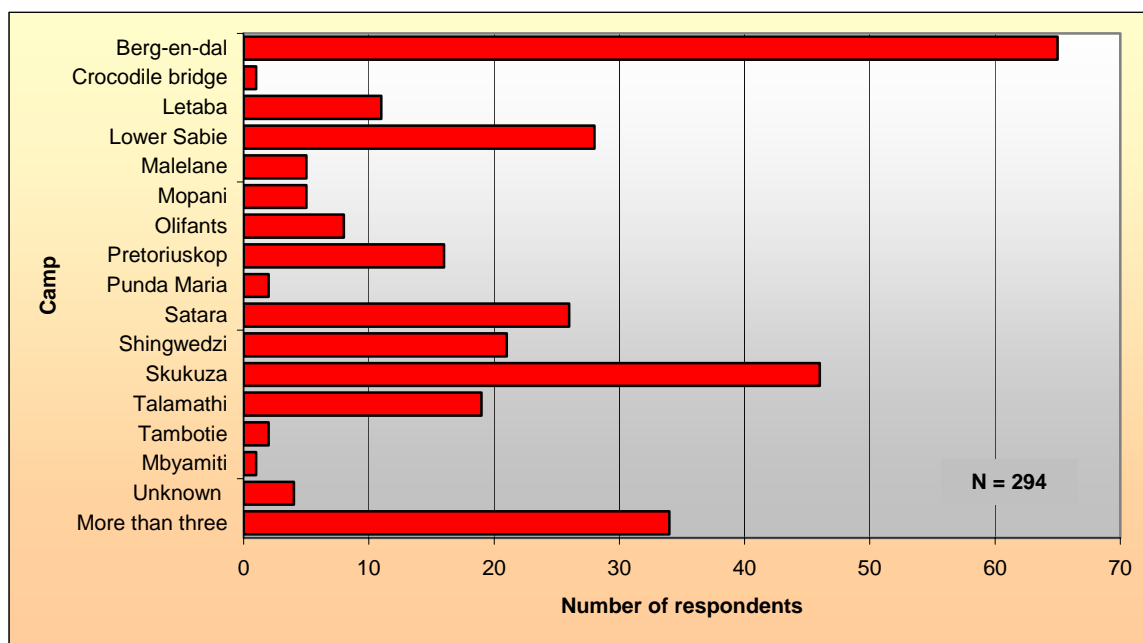
4.2.5 Accommodation satisfaction

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)
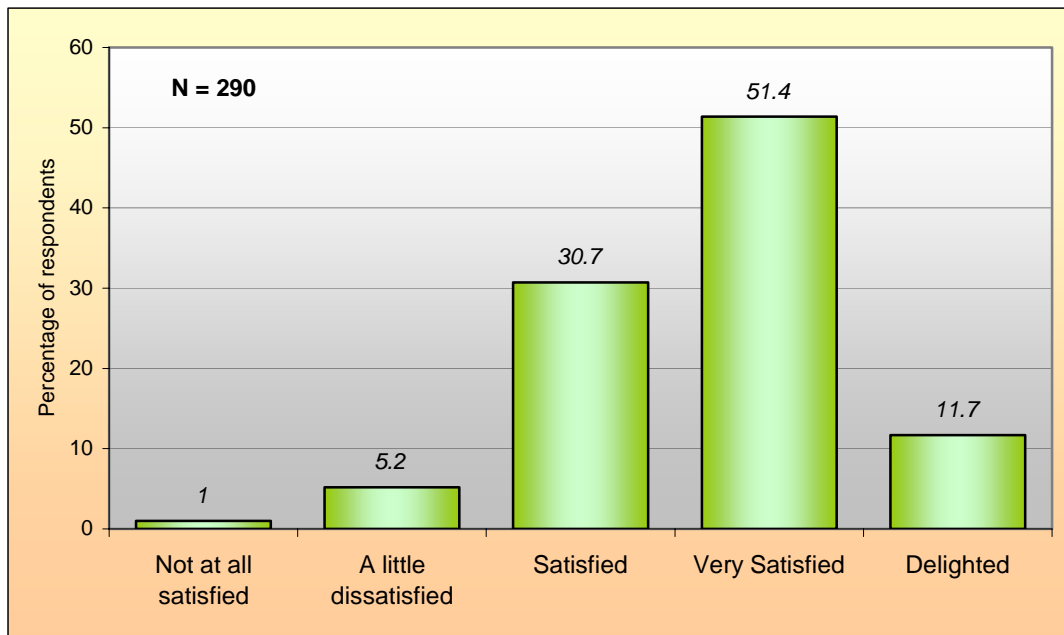
4.2.5.2 Satisfaction of South African and foreign respondents

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)
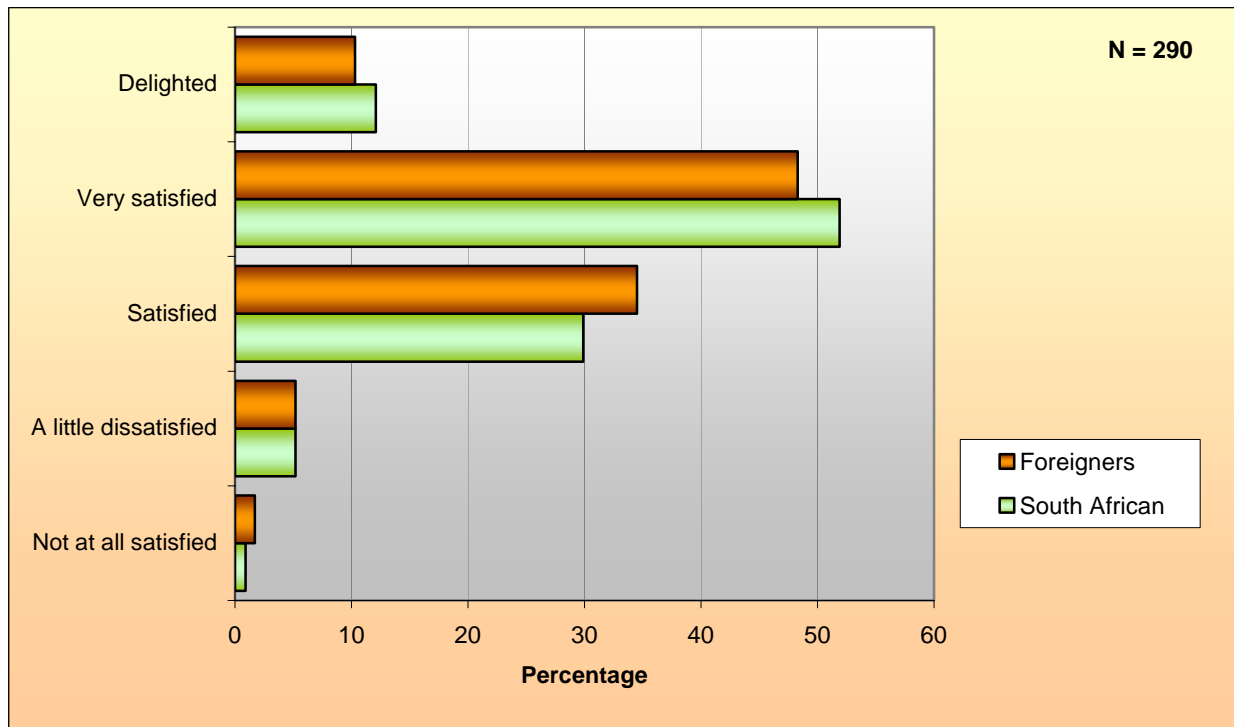
4.2.5.3   *Outsourcing of accommodation*

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 %**

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FIGURE 4.18: Percentage of responses of South Africans and foreigners regarding the outsourcing of accommodation
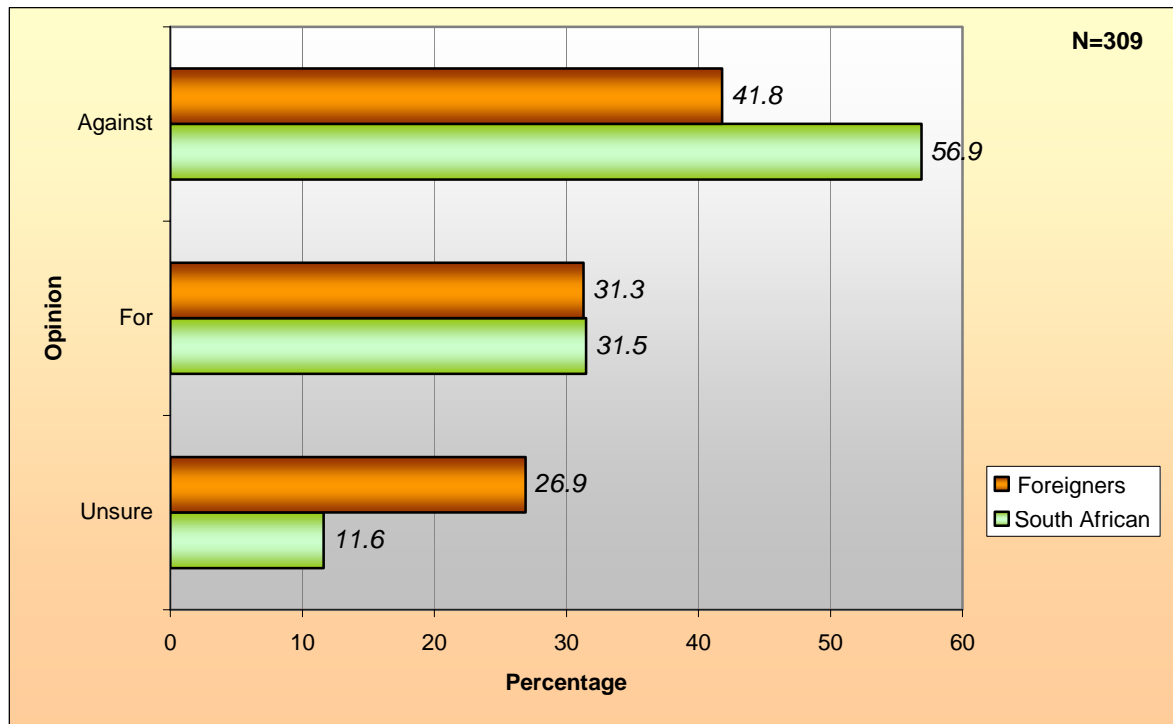
Respondents who were opposed to outsourcing gave a number of different reasons for their opinions. These are listed below:

- 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 pensioners[40];

- 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.

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[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
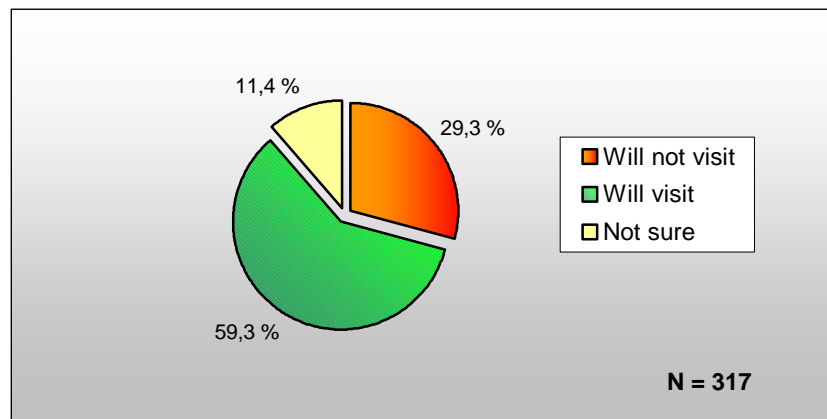
4.2.5.5   Different accommodation rates for foreigners

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**
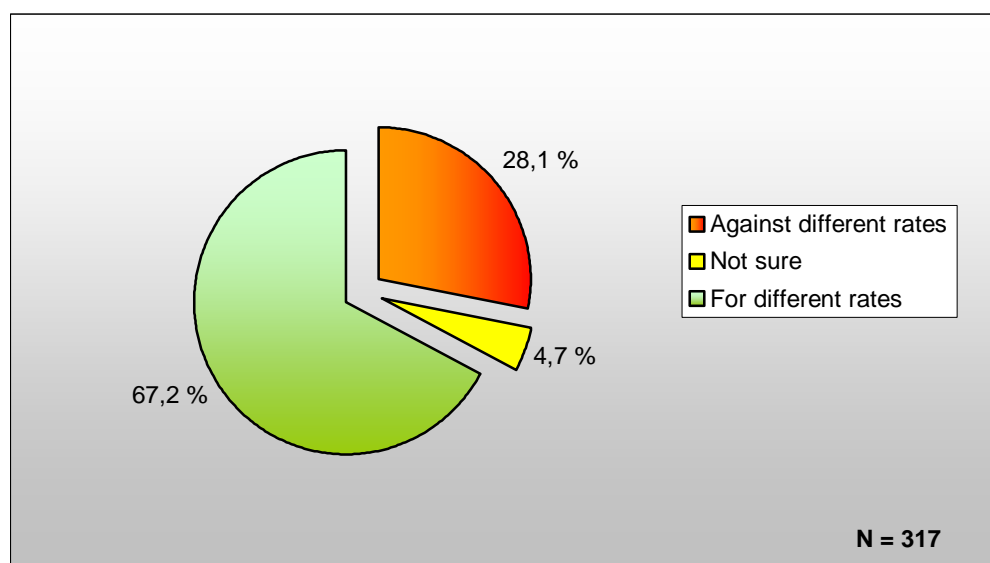
The 213 respondents who agreed that foreigners should pay different rates, were asked to indicate what kind of difference they would consider to be fair. The majority of this group considered '50 % more' to be fair (see Table 4.24 and Figure 4.21). Very few respondents considered 'three times the price 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

N = 213
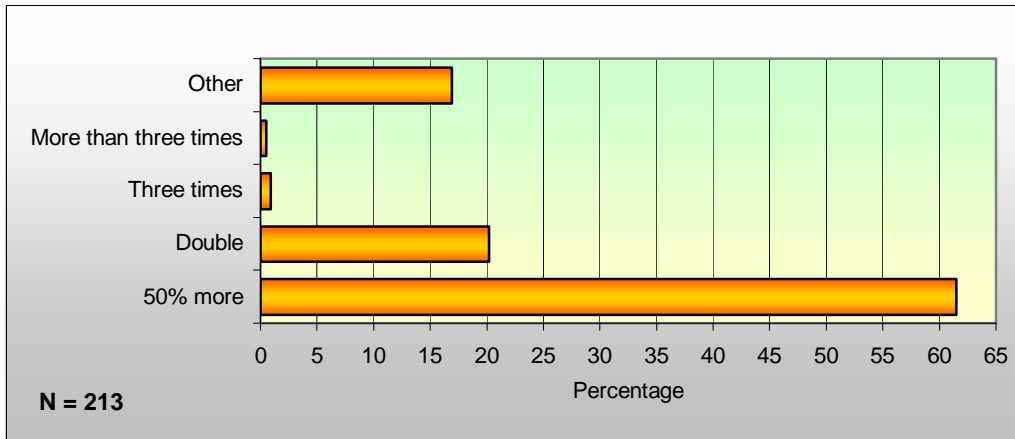
4.2.5.5.2   AGREEMENT BY SOUTH AFRICAN AND FOREIGN RESPONDENTS

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

N = 316

158
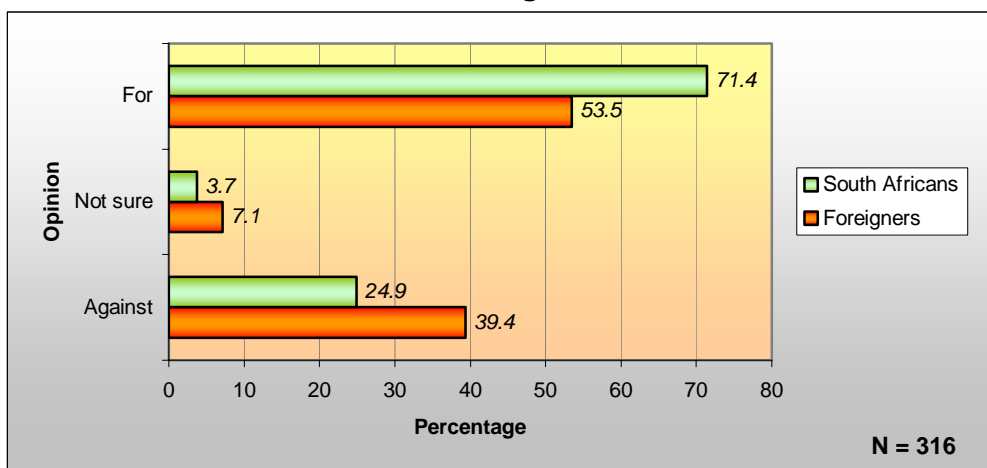
4.2.6   Discussion and interpretation

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 clattered 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 *(Personal Values or A-level)*	Achievement Personal well-being Quality of life Responsible individual Self-esteem	Financially unaffordable, financial insecurity hinders personal enjoyment of the park
Psychological consequences *(B-level)*	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 *(C-level)*	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)
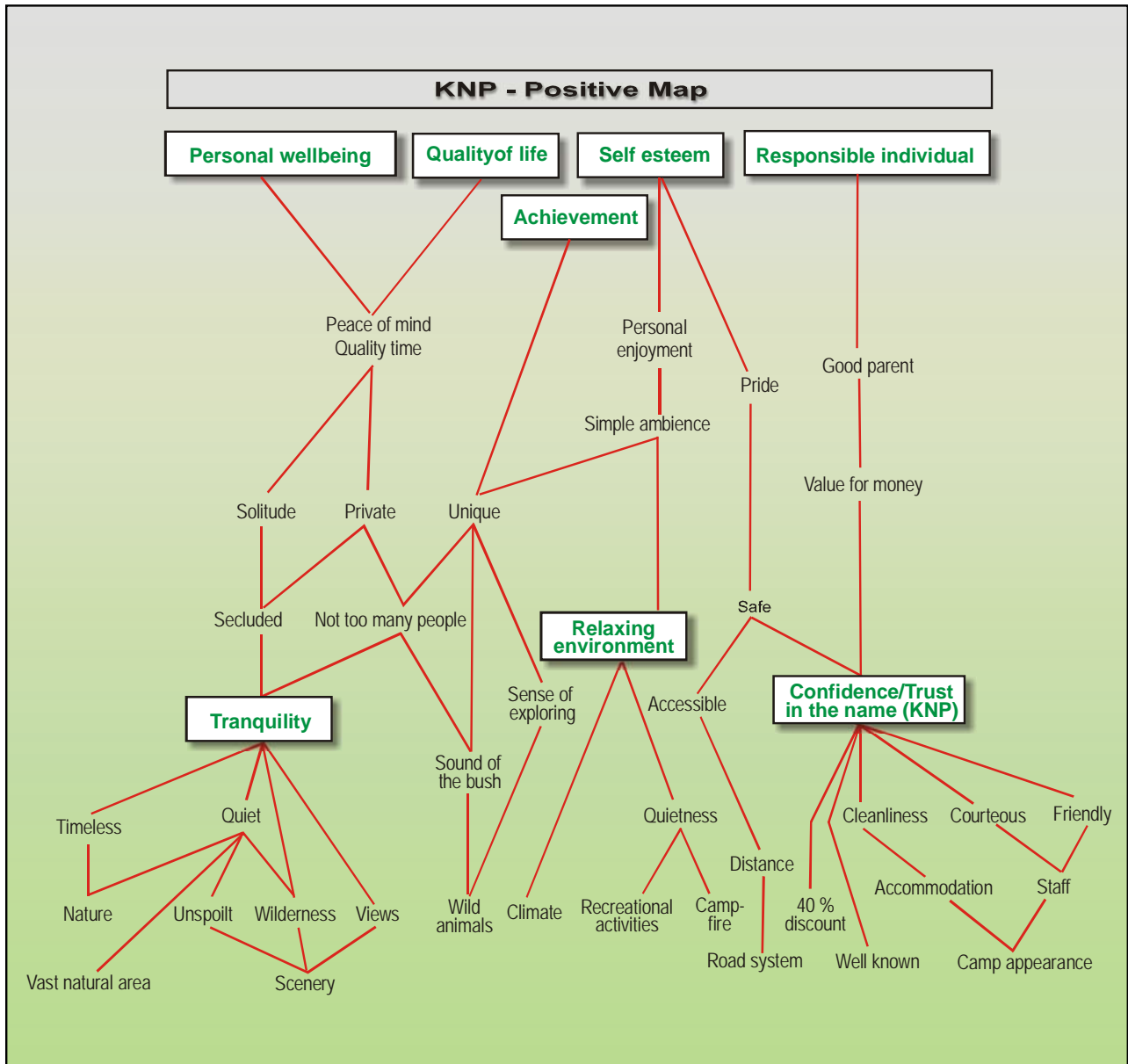
One of the positive attributes expressed by many respondents is the role that wilderness qualities play in the total enhancement of experience of a KNP visit, thus becoming an important deciding value in a choice of holiday destination. Wilderness qualities in the positive map in Figure 4.23 are captured in attributes such as solitude, simple ambiance, 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)
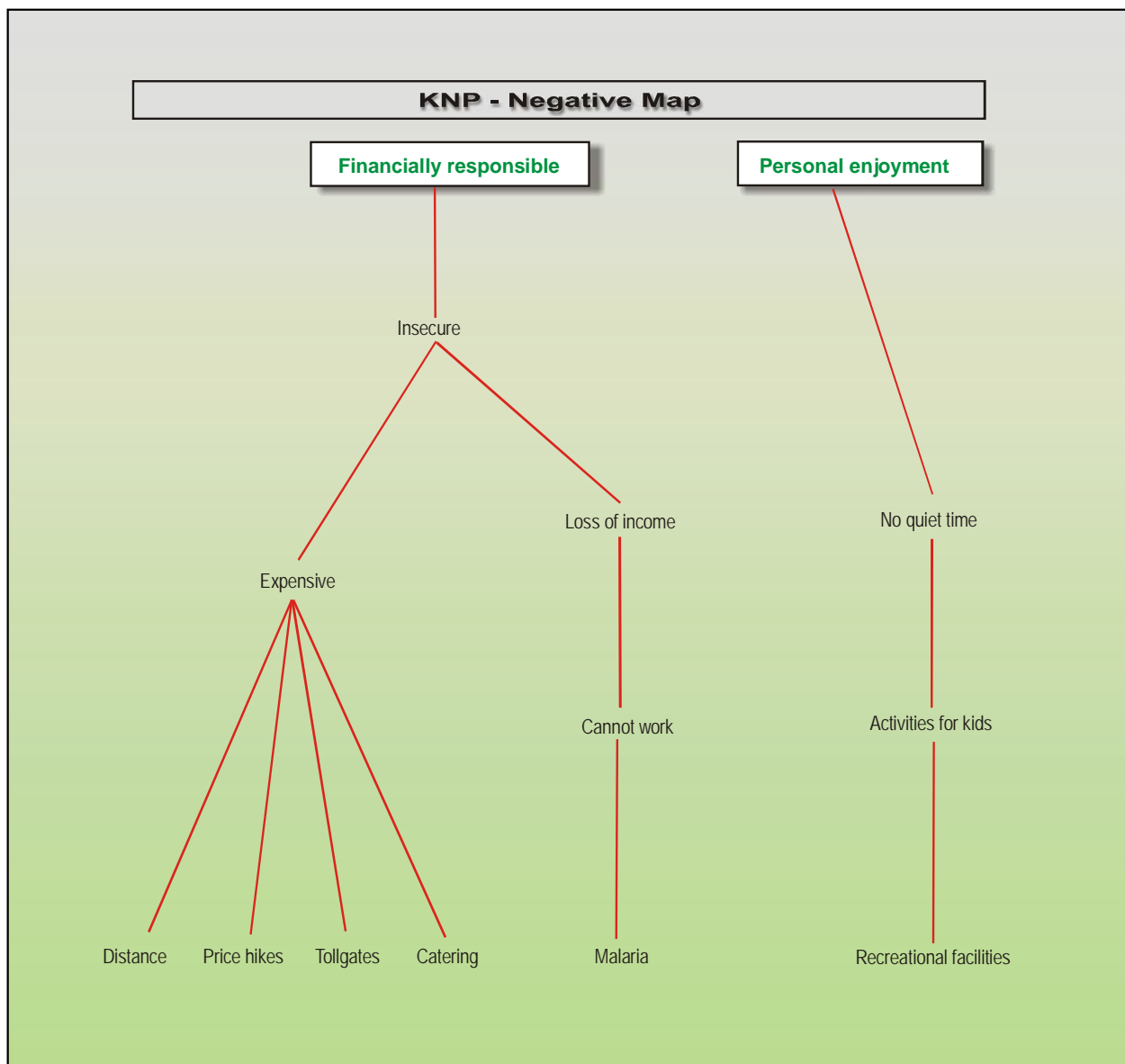
food, expensive tollgates, price hikes and long distances to travel were often commented upon as negative attributes to their enjoyment of the park. Although the negative map is statistically insignificant, tourists have a tendency to remember a single bad experience out of many positive ones. It is 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.

CHAPTER 5

BENEFITS BEYOND BOUNDARIES – RHETORIC OR REALITY?

The objective of this chapter is to measure the level of awareness, attitudes and perceptions of communities living around the KNP regarding their involvement in tourism and conservation activities. A brief background is followed by a survey which tries to determine whether there are tangible benefits flowing from protected areas to adjacent communities.

The relationship between communities and protected areas is "a marriage of heaven and hell" (Borrini-Feyerrabend, 2003). When protected areas came into existence, park managers seldom thought of sacred community areas that date back centuries and the vast conservation contributions (refer to Chapter 3) made by indigenous communities to the management of natural areas. Indigenous and local communities have devised and implemented conservation regimes for millennia using mechanisms ranging from sacred prohibitions to detailed rules for access (Jaireth & Smyth, 2003). In all, community conservation is hardly ever acknowledged and local people are too often erroneously perceived as enemies of nature (Blignaut & Moolman, 2004).

The study by Els (1994) referred to in 3.15 is an example of the reflection of perceptions, attitudes and values that black employees in the rest camps of the KNP and the adjacent communities had about the KNP and nature conservation in general. They did not see any value in conserving wild animals and had a negative view about nature conservation and the KNP.

5.1   RATIONALE FOR THE SURVEY

The survey was conducted in the neighbouring communities of the KNP to determine levels of awareness, attitudes and perceptions with regard to their involvement in park activities as stakeholders and also to obtain information on future improvements on community relations and other issues that affect neighbouring communities.

5.2   OBJECTIVES

The objective was twofold – on the one hand to obtain quantitative information in the form of a survey questionnaire (see Annexure 10) in terms of general attitudes and perceptions of the

communities about KNP-related issues. On the other hand, open-ended questions were also posed to obtain qualitative information that gives a more subjective, richer and deeper view of exactly how the neighbouring communities view various aspects of the KNP's conservation and tourism activities.

5.3   RESEARCH METHOD

The researcher drew up the initial questionnaire and allowed the Social Ecology division of the KNP to use their knowledge and experience in sharpening the questions. For piloting purposes, the researcher and his team went to the Belfast community outside Kruger Gate to pilot the questionnaires. Based on the initial feedback and experiences of this pilot run, some changes were made to the questionnaire. It was noted that the questionnaire took a long time to complete, since the researchers had to talk to the participants and write down their answers. The fact that the questionnaire had to be in English (for data to be captured and interpreted) often necessitated that questions first be translated into the local language, posed, and then the answers provided by participants in their own language had to be translated back into English and written on the form by the researcher.

5.3.1   Data collection

Members of the Social Ecology division and field researchers (five Nature Conservation Diploma student interns from Pretoria Technikon) were provided with copies of the questionnaire and asked to complete the questionnaires themselves when visiting the respondents' homes. A target of approximately 200 questionnaires was initially set but only 130 were returned.

The research team completed the questionnaires and these were sent back to the researcher for data capturing and coding.

5.3.2   Sample

The target sample were individuals from the neighbouring communities. These individuals were purposefully selected to participate in the survey by employees from the Social Ecology division of the KNP.

5.3.3   Method of data analysis

Quantitative questions were coded and percentages and/or number of responses on specific distracters could be conveyed using descriptive statistics – mostly frequencies. It was also possible to consider the mean scores per question, although with the Likert-type scale (statement with answer options ranging from Strongly Disagree to Strongly Agree), this would just give an indication of the general view or attitude, since it is not a standardized scale.

With regard to the qualitative questions, responses from participants were typed and grouped according to topic area. In the next phase, themes were identified under each topic, thereafter the data was again ordened and built into sub-themes.

Qualitative data provides a deeper understanding and does not attempt to generalize. To this effect, it is more subjective and provides the viewpoint from the respondent's position. Attempts were made to cover the richness of information received in such a way that no important themes or identified topics were omitted.

5.4   RESULTS

The results are presented in three sections. Firstly, descriptive information on the sample is given. Thereafter, the quantitative results and the qualitative results are provided separately.

5.4.1   Sample

A total of 130 questionnaires were returned. Some of the questions provided biographical information and the sample is thus described based on this information. Figure 5.1 shows the gender distribution of the sample.

Figure 5.2 shows the distribution of age groups for the participants.

It should be noted that this sample can not be considered representative, since participants were not randomly selected in any way. Nevertheless, a good age distribution is evident from the above figure.

Next, the language distribution for the participant group is shown in Figure 5.3. The largest two groups in terms of language were the Siswati and the xiTsonga groups.

FIGURE 5.1:   Gender distribution (as percentage) of the sample

N = 130

Unknown — 14

Female — 32

Male — 84

Percentage of respondents
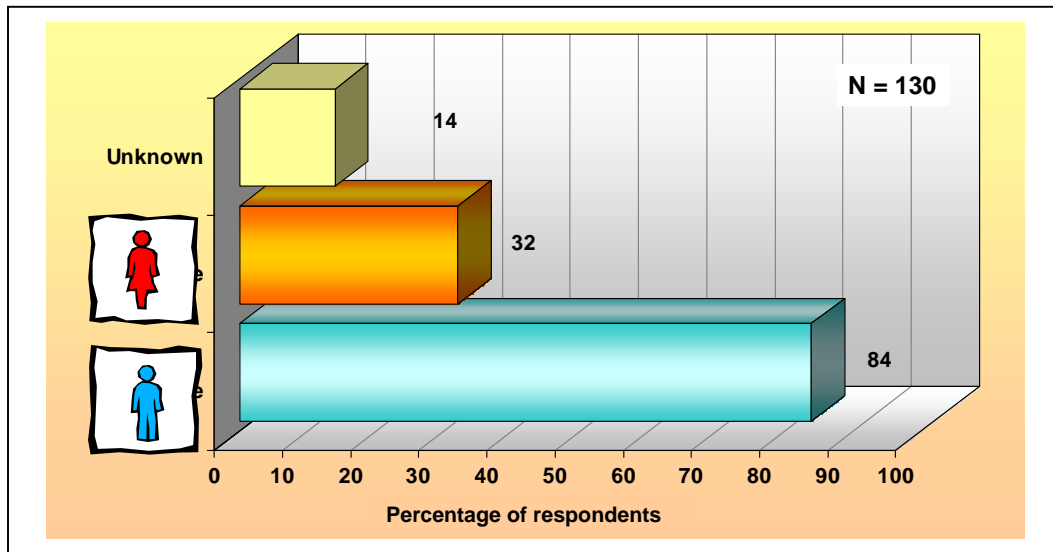
FIGURE 5.2:   Age distribution (as percentage) of the sample

N = 130

Age group	Percentage
Unknown	2
<20	23
20-29	15
30-39	28
40-49	18
50-59	8
>60 years	6

Percentage of respondents — Age group
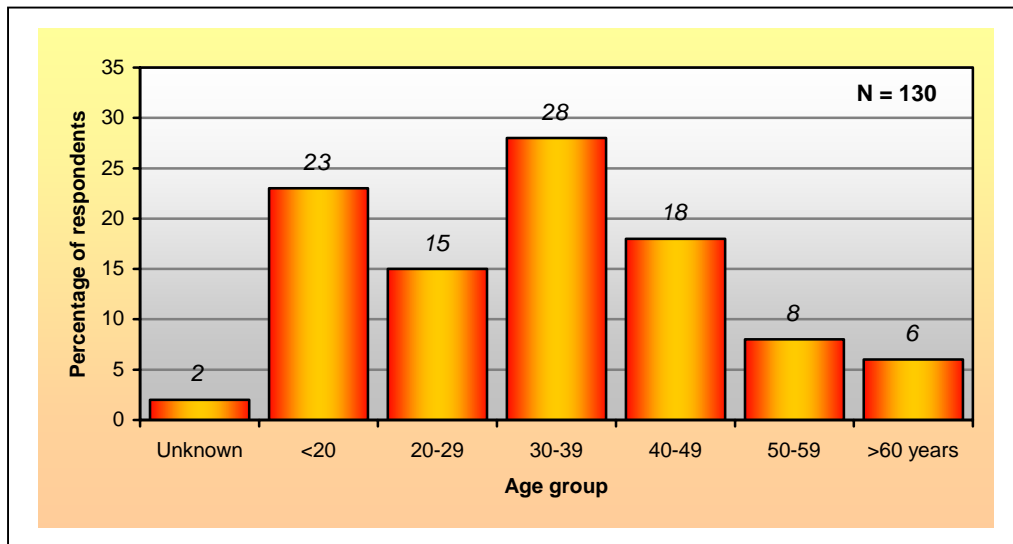
FIGURE 5.3:   Language distribution (as percentage) of the sample

N = 130

Language group	Percentage
Unknown	3
English	1
Setswana	2
Sepedi	4
Sesotho	7
Vavhenda	15
XiTsonga	30
Siswati	38

Percentage of respondents — Language group

172
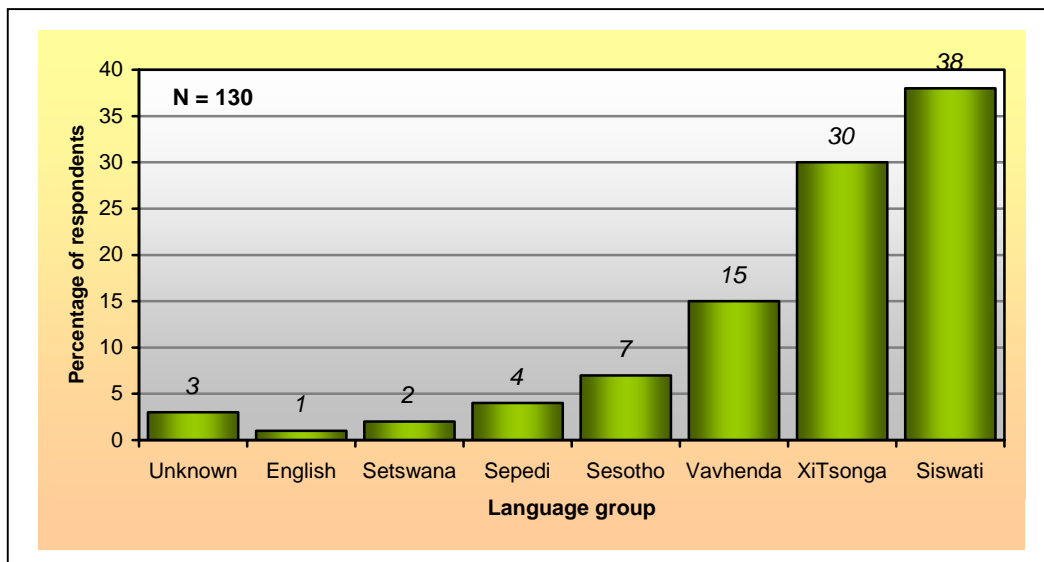
The average length of time that people have stayed in the community is 26,7 years, which is quite a long time (see Figure 5.4). It probably indicates that a large number of the participants have lived all or nearly all of their lives in the particular community.

FIGURE 5.4:   Length of time lived in the community
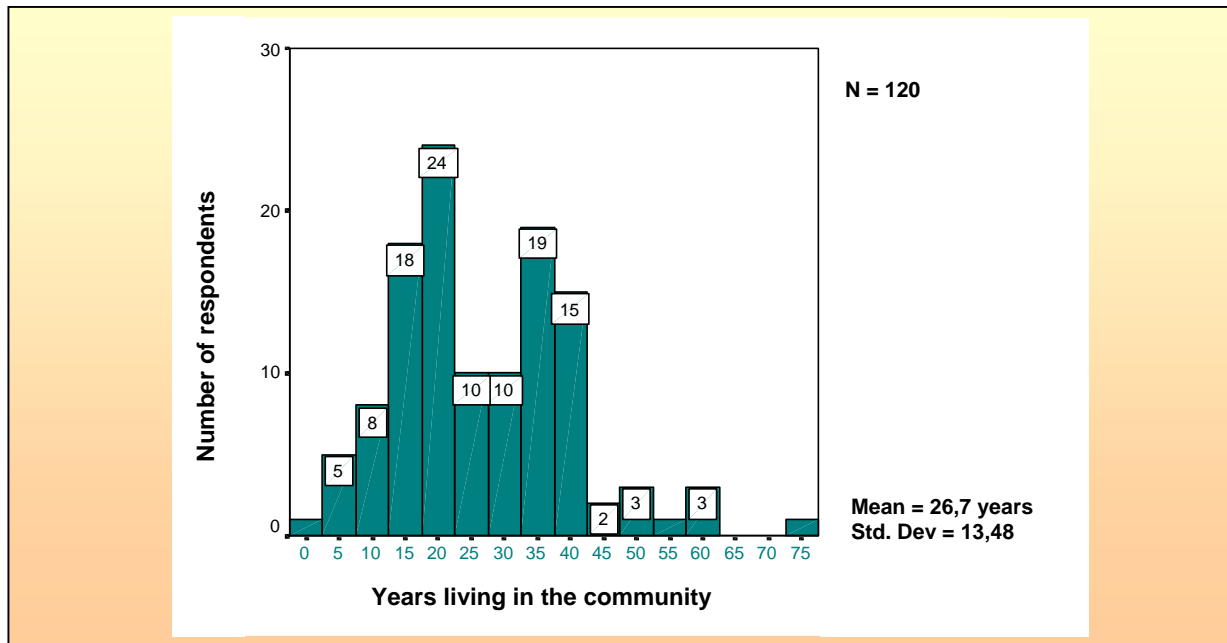
People from a total of 49 different villages in 30 tribal areas were included in the sample. Since very few individuals from each village and area were included, it would not make much sense to group their results in any way.

5.4.2   Quantitative results

The complete frequency distribution of alternatives chosen for the total group per question is provided in Annexure 11. In this section, an overview of the quantitative results is provided.

A total of 70,6 % of the sample indicated that they had visited the KNP, with almost half (35,3 %) indicating that they had visited the KNP for recreational purposes. With regard to questions posed about the number of times the KNP has been visited as a tourist, the results for those who have visited the park are provided in Figure 5.5.

A total of 9,4 % of the respondents indicated that they themselves had worked for (or are currently working for) the KNP, while 30 % of the sample indicated that someone in their family had worked for or are presently working for the KNP.

FIGURE 5.5: **Respondents' number of visits to the KNP as tourist**
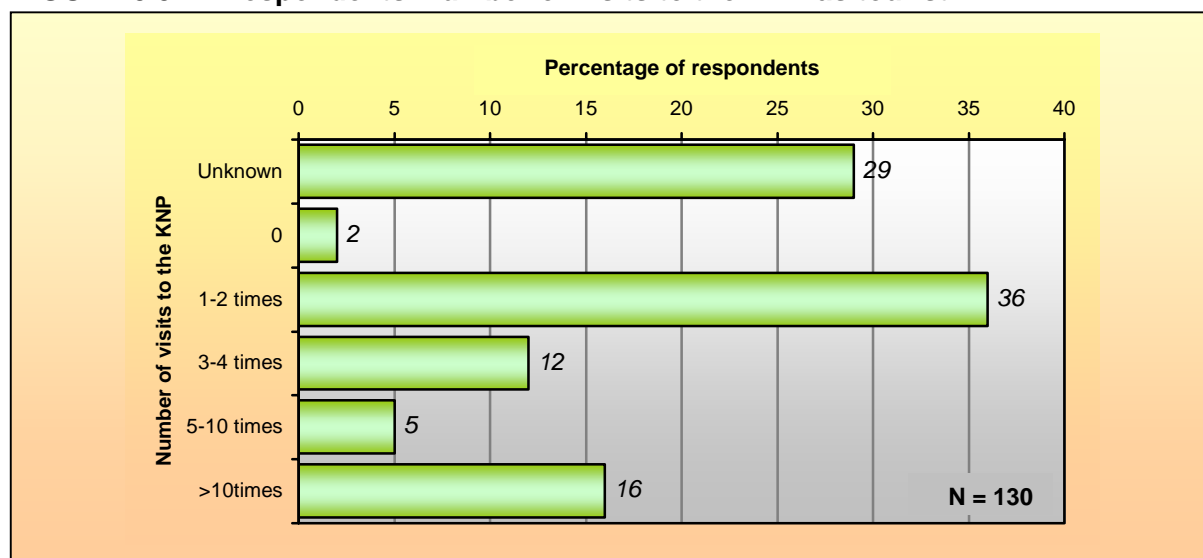
In response to a question about their awareness of formal meetings between the KNP and their local community, 46,8% (n=59) of the respondents indicated that they were aware of such meetings.

The above information indicates that the sample can be considered to be reasonably well-informed about matters pertaining to KNP issues. Since a large percentage (70,6 %) of them have actually visited the park, their comments were based on their own personal experience of the park.

The mean scores on the remaining quantitative questions (5-point Likert scale) are indicated in Table 5.1 below. The distribution of responses is indicated in Annexure 11.

Only questions 39 and 45 were phrased in a negative manner (i.e. so that agreement would indicate a negative attitude or a potential problem area). On the whole, the means scores show responses in the direction of agreement (means > 3). More useful information can be obtained by viewing the distribution of responses per question (see Annexure 11).

In the present sample there are no clear groupings that could sensibly be compared with each other. Therefore the results for this survey are presented for the group as a whole.

5.4.3 **Qualitative results**

The qualitative results are based on transcriptions of comments covering 30 pages made in response to the open-ended questions posed in the questionnaire. These were first grouped

together per question thereafter themes were identified. The most prevalent themes are summarized as part of the discussion and interpretations in 5.5 below.

TABLE 5.1:   Descriptive results for quantitative Likert-scale questions

Descriptive Statistics					
Question	N	Minimum	Maximum	Mean	Standard Deviation
Q28	122	1	5	4,87	0,655
Q29	122	1	5	4,90	0,552
Q30	121	1	5	4,79	0,686
Q31	120	1	5	4,55	1,114
Q32	117	1	5	4,70	0,780
Q33	120	1	5	3,31	1,576
Q34	117	1	5	3,06	1,604
Q35	121	1	5	2,62	1,685
Q36	121	1	5	4,36	1,365
Q38	121	1	5	4,23	1,283
Q39	120	1	5	3,71	1,652
Q40	121	1	5	4,39	1,150
Q41	117	1	5	3,96	1,392
Q42	112	1	5	3,46	1,681
Q43	118	1	5	4,52	1,175
Q44	117	1	5	4,33	1,333
Q45	116	1	5	4,75	0,864
Q46	116	1	5	4,11	1,394
Q47	117	1	5	4,56	0,995
Q48	114	1	5	4,84	0,525
Valid N (listwise)	102				

5.5   DISCUSSION AND INTERPRETATION

The sample was not representative but one of convenience due to the preparedness and availability of the respondents to answer the questionnaire. The Social Ecology group drew participants from their operational regions named Forums. Most of the participants therefore had some prior exposure to the park's activities. The fact that most of the respondents in the survey have lived on average 26,7 years in areas adjacent to the park made them knowledgeable about what is happening in the region.

From the mean scores reflected in Table 5.1 and Annexure 11 it is evident that the respondents were positive about the KNP, nature conservation and its value for future generations. Communities want to participate and they view the park in a positive light. This is quite a dramatic swing from the results of the study carried out by Els (1994) and referred to in

3.15, and from perceptions currently held by some park managers who think that communities do not appreciate nature conservation. The Social Ecology division has succeeded to a relative extent in the last six to seven years of its existence to normalize relations between the Park and its neighbours. There are a few issues that communities are concerned about.

The neighbouring communities' attitudes and perceptions towards the KNP were also measured and found to be positive. This was an unexpected finding, given the fact that previous studies by Els (1994), Carruthers (1995), Cock & Fig (2000), Pollard *et al* (2003), and Blignaut & Moolman (2004) detected intense animosity between communities and the KNP. This finding is also confirmed by Magome (in press) in his survey on relationships between the KNP and 10 communities on the western boundary of the KNP. Magome (in press) states that there is no animosity between communities and the KNP and that communities are willing to be involved in conservation and tourism management activities. It is therefore evident that communities are prepared and willing to be part of their heritage although they have expressed concerns on how Park management relates to them as stakeholders.

However, mixed feelings prevailed about the affordability of prices charged for admission, accommodation and other services. There was a strong feeling that a special rate should be created for local communities. It was also felt that, although tourists bring much needed revenue to the local economy, they also unwittingly push up prices of goods in the area.

There was an overwhelming consensus that the KNP should invest a portion of its tourism earnings into a community development fund to assist in the building of public facilities like schools, roads and clinics. Communities want to benefit from the business of supplying services to the Park. In general, communities would appreciate the opportunity to formally participate in the development of conservation and tourism policy in the KNP because they are affected by these activities in various ways. They still experience serious problems with escaped animals from the Park that plunder their crops, kill their livestock and threaten their lives.

From the qualitative remarks it transpired that the respondents regard the KNP as a national asset. Such a status warrants cheaper rates than those of private lodges.   Communities regard the Park as a preferred recreational destination where they can also learn about wildlife and the environment. However, the reality is that most members of neighbouring communities visit the Park as day visitors and there are not enough day-visitor areas where they can achieve this "spiritual upliftment". Communities would want to share not just craft and art

experience with tourists but their culture too. Unfortunately, the current management system in the Park offers them limited opportunities to realize their aspirations.

While communities acknowledge that there are some job opportunities for them in the Park, there are no other tangible benefits from the Park's existence in their midst. They do not know "how and what should they benefit from the Park". There is no formal relationship or mechanism in place to facilitate such a benefit-sharing scheme thus confirming the findings of Blignaut and Moolman (2004). They (communities) would like to see a closer and more frequent contact with the Park authorities in meetings and to discuss matters of common interest. The Park can only become "*Xa Mina – Xa Wena*" (Its Mine –- its Yours) if both the Park and communities work together and share benefits. Communities are protective of the Park's resources and would not like to see an unsustainable use of resources. They do not want to graze their livestock in the park, collect firewood or hunt animals (although they had earlier expressed such desires in Els' (1994) study). The use of medicinal plants should be regulated and managed by trained people. Animals should be conserved for future generations. Overall the survey found the community's attitude and perceptions about the Park to be positive. Communities seem to be ready to participate in tourism and conservation policy formulation and implementation activities in the KNP whilst management is under the impression they are not.

5.6   SWOT ANALYSIS

Based on the surveys and findings discussed in the previous chapters, the researcher suggested a cascade of Strength, Weaknesses, Opportunities and Threats (SWOT) Analysis that should be considered when formulating the KNP's integrated tourism management framework. The SWOT Analysis Table is attached as Annexure 13.

The chapters on literature review, historical overview and the cascade of surveys conducted in this study reveal strengths, weaknesses, opportunities and threats (SWOT) for the KNP tourism service-delivery system. A comprehensive evaluation of the findings of the survey follows.

5.7   COMPREHENSIVE EVALUATION OF SURVEYS

The respondents in the KNP surveys discussed in Chapters 4 and 5 manifest mixed feelings about their overall experience. A comprehensive summary of the survey findings is:

- the KNP lacks an overall vision/mission and management framework to manage tourism;

- there has been no adequate and effective identification and management of tourism and recreational values which underpin service-delivery in KNP;

- exist no system to evaluate tourist motivation, expectations and satisfaction and market segments;

- although there are pockets of service and product excellence in some camps, service-delivery is generally unpredictable, inconsistent and suffering from perennial poor quality effects;

- tourism service-delivery is fragmented with both tourism and conservation activities operating in isolation from each other;

- the Park's unique selling point, the vast wilderness areas, are grossly under-exploited;

- tourism staff are under-qualified and untrained in hospitality management to effectively and competently manage tourism;

- the perennial shortage of money results in tourism facilities being poorly maintained;

- there are concerns about the implementation and effect of the commercialization strategy on the wilderness qualities of the Park;

- there are no indicators to manage tourism impacts to protect the Park's wilderness qualities and enhance tourist experience;

- tourists are attracted by the Park's natural and wilderness qualities and the KNP should manage these through its management plans; and

- although communities display positive attitudes towards the KNP and aspects of conservation and tourism activities, they do not derive any tangible benefits towards the improvement of their socio-economic status.

5.8   CONCLUSION

From the findings of these surveys it is evident that the KNP needs an integrated tourism management framework that describes how tourism and recreation values will be managed in accordance with the Park's primary objectives. Such a management framework should be a broad policy guideline with clear performance indicators to measure effectiveness. Chapter 6 suggests such an integrated management framework in detail.

CHAPTER 6

FORMULATING A TOURISM MANAGEMENT FRAMEWORK

6.1   MANAGEMENT CONTEXT

In this chapter only the framework is suggested as a template and helicopter's view to guide the formulation of an integrated tourism management framework. The findings of the literature study and surveys are used to kick-start the development of possible indicators or thresholds of potential concerns (TPCs) to measure tourism performance and impacts on the environment. Aspects such as a management philosophy, tourism-recreation values, hospitality standards to measure product and service quality, grading of the tourism facility, human resource planning, financial management, business planning and marketing are discussed as essential elements of a tourism management framework. The expected outcome is a generic framework that will evolve in time through adaptive management into a fully integrated tourism management framework.

6.2   LEGAL BASIS

The past decade has seen a major process of environmental law reform that has repealed environmental legislation passed during the apartheid era and replaced it with legislation that reflects the policies and approaches of the post-1994 government. To this effect two Bills have been formulated to give detail to the legal framework governing biodiversity planning and protected area management. The National Environmental Management: Biodiversity Bill, 2003, deals with the establishment of a biodiversity planning system that will provide the basis for the identification of biological life forms to be placed under formal protection in either a provincial or national park/nature reserve context. The National Environmental Management: Protected Areas Bill, 2003, provides for the identification of a management authority for each protected area that must manage it according to a management plan that meets agreed-upon national standards. The implementation of these Bills will mean that norms and standards for the achievement of key policy objectives will be set and regular reporting will occur to enable regular evaluation of the management effectiveness of the protected areas at site or system levels[41].

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[41] Workshop held at Skukuza on 16-17th July 2003

The National Environmental Management: Protected Areas Bill, 2003, will govern the management of all protected areas in South Africa (see 2.8). According to this Bill the purpose for creating a national park should be to

- protect
    - the area if it is of national or international biodiversity importance or is or contains a viable, representative sample of South Africa's natural systems, scenic areas or cultural heritage site, or
    - the ecological integrity of one or more ecosystems in the area;
- prevent exploitation or occupation inconsistent with the protection of the ecological integrity of the area;
- provide spiritual, scientific, educational, recreational and tourism opportunities which are environmentally compatible; and
- contribute to economic development (DEAT, 2003).

6.3   PREPARATION OF A MANAGEMENT FRAMEWORK

6.3.1   The process

The National Environmental Management: Protected Areas Bill, 2003, requires that a management plan be prepared for each national park. A management plan is a strategic policy document that outlines how a park or nature reserve will be managed in years ahead. It is not a static piece of paper but rather a dynamic technical document that has to be improved at regular intervals as circumstances change. Planning in general should not be done in isolation by an individual (expert) but should rather involve internal as well as external stakeholders.

Cohen & Eimicke (1995:196) define a strategy as "*the basic pattern of current and planned resource deployments and environmental interaction that indicates how an organization will achieve its objectives*". According to the authors, **strategy** formulation involves the following steps:

- defining objectives – what are the desired outcomes?
- identifying potential activities – what means can be devised to accomplish the objectives?

- describing actual and potential organizational capabilities – what activities can be implemented by the organization?

- projecting the expected results of specific activities – to what degree *will* these activities result in the accomplishment of specific objectives?

- assessing the impact of specific activities – to what degree *did* these activities result in the accomplishment of specific objectives? and

- correcting midcourse – what changes are needed in activities, resource allocation or objectives?

In its simplistic understanding a ***management*** plan involves the following activities:

- defining tasks and responsibilities;
- setting time lines for achieving goals;
- benchmarking (indicators) against which progress can be measured; and
- determining resource needs.

A ***business*** plan will focus on the identification of resource needs and is intended to give a clear picture of the following:

- financial needs that must be met in order to implement the proposed management framework, and

- potential revenue sources to help meet the needs.

A full discussion of the business plan is beyond the scope of this research project, although aspects of it will be discussed at the end of this chapter (see 6.14).

The proposed KNP tourism management framework should ultimately become a strategy based on the above steps to achieve the specific objectives of ensuring the protection, conservation and management of the KNP in a manner that is consistent with the primary goals of its establishment as enshrined in its founding legislation. The National Environmental Management: Protected Areas Bill, 2003, prescribes the procedures for the adoption of a management plan as follows:

- management conducts a situation analysis and prepares a draft plan as an initial discussion document;

- the draft plan is put up for public comment for a prescribed period ranging between one and six months (or more depending on the size of the park, stage of development and range of values to be protected);

- public comments are received and the plan is referred to the SANParks Board of Trustees for consideration;

- the SANParks Board may endorse the plan after considering the recommendations of management and the public or may refer the plan back to management for further investigation or improvement;

- once the plan has been adopted by the Board, it will be referred to the Minister of Environmental Affairs and Tourism for final approval; and

- the entire process of developing a management plan may take anything between 12 and 24 months depending on the complexity of issues involved[42].

After Ministerial approval has been obtained, no operation may be undertaken within the national park unless it is in accordance with the plan. A ***management*** plan must contain

- policies, planning measures, controls and performance criteria as may be prescribed;

- an implementation programme and associated costing; and

- performance indicators to assess performance.

The Minister has powers to set performance indicators against which a national park's performance may be measured and to appoint an independent assessor to carry out such an audit in a legally binding exercise to enforce compliance with the overall objectives of a management plan and the Act (DEAT, 2003).

6.3.2   Definition guidelines

For purposes of preparing a management plan, the Workshop delegates[43] adopted the IUCN Guidelines for Protected Area Management which defines a protected area as *"a natural area of land/or sea, designated to*

> *(a)   protect the ecological integrity of one or more ecosystems for present and future generations;*

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[42] The researcher convened a workshop on the 16-17th July 2003, attended by KNP and Head Office managers and practitioners for presentation of the research results and to make contributions to the management framework formulation process (see 6.4)

[43] Workshop held at Skukuza on 16-17th July 2003.

(b)   *exclude exploitation or occupation inimical to the purposes of designation of the area; and*

(c)   *provide a foundation for the spiritual, educational, recreational and tourist opportunities, all of which must be environmentally and culturally compatible"* (IUCN, 1994).

Tourism and recreation services in the KNP offer tourists a range of activities and experiences to enjoy. The emphasis in tourism and recreation provision is on encouraging learning, understanding and enjoyment of the natural and cultural environment. The KNP offers 7 325 beds per night inclusive of camping and chalet accommodation. In addition, tourists can enjoy day walks from camps, night and day drive safaris, film shows, bush braais or a round of golf and wind down the day with a meal at any of the Park's restaurants. All these services and facilities should be provided under the following policy guidelines suggested at the Workshop held at Skukuza on 16-17th July 2003:

- facilities for tourism and recreational use will be provided consistent with the conservation ethic of the KNP;

- interpretive and educational information will be provided at facilities to promote understanding and enjoyment of natural and cultural features;

- the attitudes and preferences of Park tourists and in particular special interest groups such as the elderly, disabled and school children will be considered in the management of tourism and recreational use;

- the impact of tourist use will be monitored and protective measures undertaken as necessary, consistent with the objectives of this management framework;

- it is usually inappropriate to create artificial features that are inconsistent with the purpose of providing ecotourism and recreation opportunities and care will be taken not to debase the wilderness qualities of the Park when providing infrastructure;

- commercial trade opportunities will be supported where they contribute to an increase in the range of recreation opportunities available and are consistent with the objectives of the management framework;

- the development of facilities for tourism and recreation will be encouraged, provided they are compatible with long-term planning and management of the Park;

- concession holders of all types will be required to undertake operations in accordance with approved and specified schedules. No activities that restrict the activities of other Park users will be permitted; and

- interpretation and environmental education programmes will seek to assist guests to understand, appreciate and enjoy the Park as a natural heritage.

In general, research will be encouraged in the assessment of the impact of tourists and tourist facilities on natural ecosystem.

6.4   CONSULTATIVE WORKSHOPS

On completion of the surveys (see 4.1, 4.2, 4.3 and 5.1), the researcher convened two consultative workshops to share with KNP managers and key tourism operational staff the findings of the surveys. It was mentioned in 2.9. that a management plan must reflect the needs and priorities of those who will implement it. It should be a product of a constructive partnership with all relevant stakeholders. The National Environmental Management: Protected Areas Bill, 2003, insists on a consultative process that should involve both internal and external stakeholders (Cowan *et al.*, 2003).

The first workshop referred to above, was held on 16-17th July 2003 at Skukuza and attended by tourism managers, scientists, game rangers, administration officers, human resources practitioners, finance staff and representatives of organized labour. The researcher presented his findings while senior researchers and managers also participated by presenting papers to provide the current status of the situation in KNP with regard to tourism and conservation management. The meeting jointly deliberated format on the proposed mission statement for tourism in group-dynamics . The four groups worked on four themes, as follows:

- balance between tourism and conservation of biophysical properties;
- tourism opportunities arising from the ROZ Plan;
- tourism programme designed to meet tourist expectations; and
- underlying support that influences tourism (environmental law reform, human resources (HR) and finance, and infrastructure development and maintenance).

The working groups generated notes on flip charts that were later interpreted and collated by the researcher into synthesized themes. From the notes, the Workshop was guided by the researcher in formulating and generating the mission statement, specific objectives, secondary objectives and tourism policy guidelines to underpin the proposed management framework (see Annexure 14). Working groups were formed across disciplinary divides (encouraging an integrated approach) to suggest critical environmental indicators or criteria against which tourism performance will be measured. This will be an ongoing process led mainly by the Conservation Services Division in collaboration with both the Tourism and Finance Divisions.

The second workshop was held on 19 and 20 August 2003 at Skukuza to deliberate on the process that will formulate detailed hospitality standards to measure service quality in the KNP. Among others, duty managers, hospitality service managers, regional managers, Head Office tourism directorate, tour operators and an external facilitator attended the workshop. The workshop's brief included the development of a standardised reporting and presentation format, an implementation plan and a monitoring and evaluation plan. A working group with specific time frames was formed to drive the process. Initial ideas were brainstormed and these are presented in 6.6 of this research thesis.

6.5   MANAGEMENT PARADIGM

For purposes of developing the new tourism management framework the adaptive management paradigm was adopted (see 2.4). It is based on the premise that tourism operates in fast changing (internal and external) environments. Such environments are complex, unpredictable and operate on rarely complete information or certainties. The ability of a tourism establishment to adapt swiftly to sudden changes and customer needs constitutes its strength or resilience and facilitates survival in turbulent market conditions. Strong goal-setting and establishment of indicators or thresholds of potential concerns (TPCs) to manage performance are the keys to survival of a tourism business (Biggs & Rodgers, 2003). The management plan should have monitoring and evaluation plans to assess progress, derive lessons and iterate (use results to adapt and learn). Adaptive management is fundamentally a framework of systematic analysis and learning.

Figure 6.1 represents the adaptive tourism management process (customized from the initial adaptive management cycle depicted in Figure 2.1 (2.4.2)) to be followed in the formulation and the review of this management framework after its first five-year cycle. However, it will not be possible to cover all the stages in this framework because the proposed framework is at its initial stage of development. Steps 1 to 4 of the adaptive tourism management process were discussed extensively at the two workshops and consensus was reached on the tourism mission, objectives, tourism and recreational values and what would constitute initial indicators to measure service quality and environmental impacts of tourism. The three stages of development are described in a logical sequence below. Steps 5-10 will be reached once the management framework is operational and the desired indicator/TPC has been reached. This phase is discussed in 6.6.2.2 (Tourism and Recreational Values).

FIGURE 6.1: Adaptive tourism management process
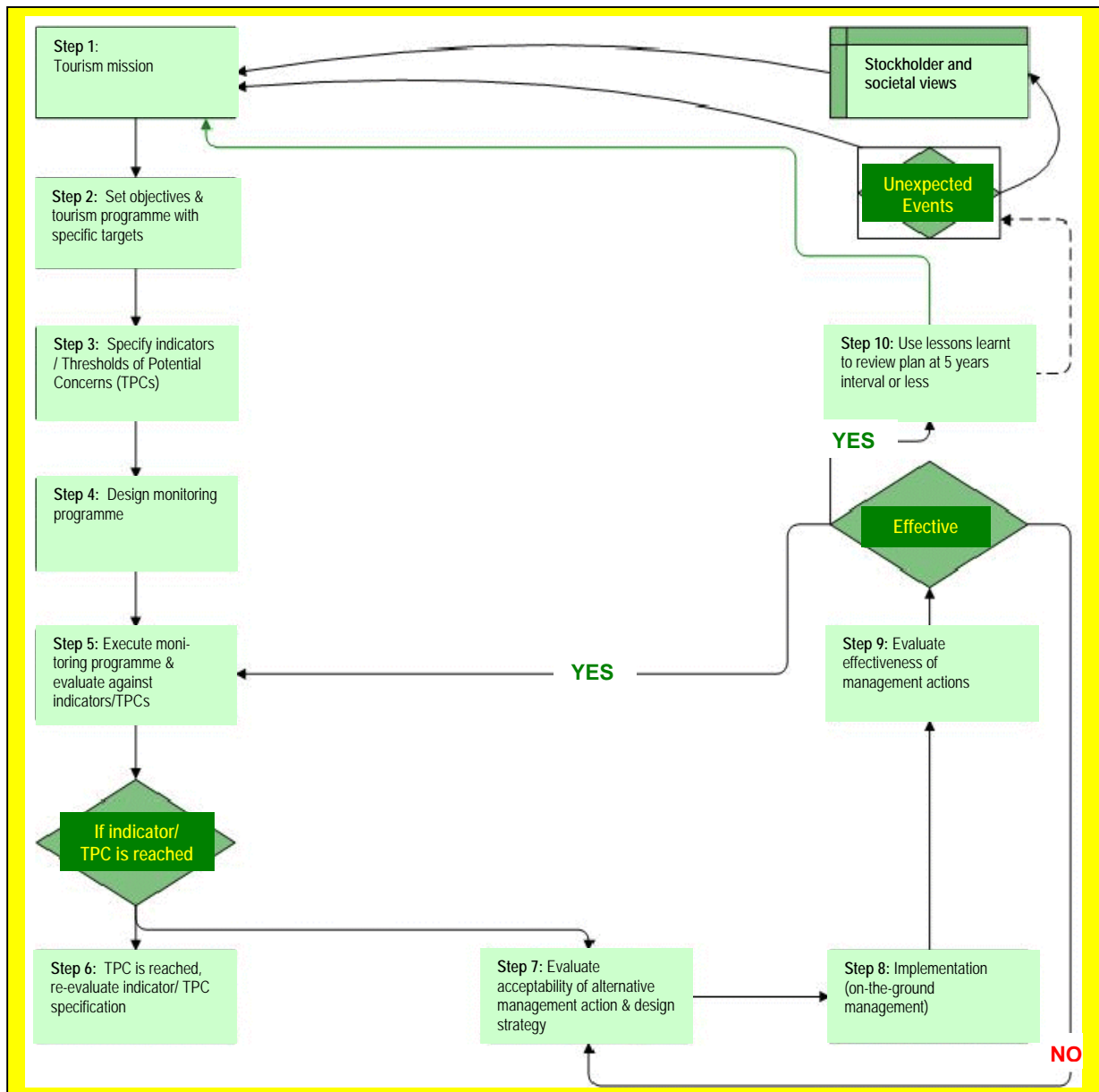
6.6   ADAPTIVE TOURISM MANAGEMENT PROCESS

6.6.1   Step 1 (Tourism mission)

"*To develop, manage and enhance a range of sustainable tourism products, in synergy with the KNP conservation ethic[44]. This will be done by satisfying evolving market needs, through predictable service excellence[45], high quality standards and infrastructure. Sound business principles will be used to generate revenue from the tourism initiative to support the SANParks conservation mandate*".

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[44] Conservation ethic: A set of integrated environmental management principles that protect the park's wilderness qualities (Venter, 2001).

[45] Predictable service excellence: Service that matches customer expectations by offering guaranteed, high quality, consistent and reliable service to avoid a mismatch of end-user expectations and vendor sales pitch (Deierlein, 1991; Bierce, 2001).

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6.6.2   Step 2 (Set objectives and tourism programme with specific targets)

6.6.2.1   Main objectives

1. Develop an integrated socio-ecological plan to act as a basis for development of sustainable tourism. This plan must embrace social values, be compliant with all reasonable biodiversity conservation needs, embrace principles of resilience and sustainability and the KNP conservation ethic, be financially viable and contain practical tools and indicators.

2. Investigate and enhance all underlying enabling factors that promote the success of sustainable tourism.

3. Study, analyse and respond to current and future market needs in the nature tourism sector and develop an appropriate range of products in accordance with the integrated socio-ecological plan.

4. Implement a service-delivery programme for tourism products and services within a total quality management (TQM) framework. This should be achieved through the provisioning of a continuum of products/services along the full chain of tourist access, travel, entry, accommodation, interpretation, wilderness qualities, effective marketing and appreciation of community cultures.

5. Generate sufficient revenue to allow funding of conservation initiatives, maintenance of infrastructure and contribution to community programmes, and

6. Create mechanisms to establish a sense of partnership between the KNP and its neighbours in a manner that contributes to social upliftment, good neighbourliness and advancement of conservation goals[46].

The main objectives are subdivided into secondary objectives and specific areas that the process of developing the management plan should follow (see Annexure 14: Mission Statement and Objectives). The implementation of these objectives will lead to a better understanding of the tourism and recreational value system that the KNP offers to tourists.

6.6.2.2   Tourism and recreation values

National Parks are created and managed to conserve, protect and preserve places which have significant natural, cultural and recreational values. Conservation is undertaken on the

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[46] Workshop held in Skukuza on 16-17th July 2003

principle that there is fundamental value in ensuring the survival of natural systems, the presence of landscapes and the recognition of cultural connection on behalf of current and future generations (Weaver, 2001). It is also recognised that people, culture and the environment are inseparable. It is due to this connection with people that the National Parks system in South Africa is created to provide appropriate and sustainable opportunities for people to enjoy, appreciate and learn about their natural and cultural values. The public use component is provided by means of careful management of tourism and recreational values of a park system.   This is done through the development of appropriate facilities in an ecologically sustainable manner at levels that are consistent with each park's category of classification, values of individual parks and visitor and stakeholder expectations (New South Wales National Parks and Wildlife Service, 2004).

Tourism and recreational values form part of Step 2 of the adaptive tourism management process. The surveys discussed in Chapter 4 revealed that tourism and recreation values in the KNP have not been adequately identified or addressed in previous management planning initiatives. Tourism and recreation values are important considerations for a management plan formulation process to reflect global trends for a more sustainable, responsible and well-managed tourism business (WTO, 1999; De Lacey *et al.*, 2002). In addition, the role of protected areas as important tourism and recreation destinations, has become increasingly understood in the last 20 years since the first management plans appeared on the scene (Weaver & Opperman, 2000; Weaver, 2001). Conservation agencies need to administer tourism and recreation professionally and to actively manage these values. This is one area where not much progress has been achieved by conservationists (see 2.6 and the whole of Chapter 4). The tourism industry, governments, communities and tourism destination managers have recognized the need for environmental-friendly, economically and socially sustainable tourism and recreation (WTTC, 1996; Newsome *et al.,* 2002). Conservation legislation in South Africa is currently in the process of being amended to reflect these changes.

The formulation of any tourism management plan in South Africa should recognise the guidelines of the White Paper on the development and promotion of tourism. The White Paper assesses the conditions under which tourism as an industry is managed in South Africa and identifies constraints and opportunities. Among others it identifies the KNP as a key icon and an internationally renowned attraction. The White Paper concludes that it is not the stock of natural resources that will determine South Africa's competitiveness as a tourism destination but rather how well these resources are managed and to what extent they are complemented

with relevant innovations (DEAT, 1996). The tourism and recreational values of the KNP underpin its attractiveness and competitiveness among other tourism destinations in the world.

Clarke & Stankey (1979) describe tourism and recreation values as the combination of physical (such as scenery), biological (native plants and animals), social (family, friends and/or other tourists) and managerial (facilities and regulations imposed at a recreation setting) conditions that give value to a place. Simply put, a tourism and recreation value should be understood as the function of the perceived ability of that opportunity (setting) to provide certain activities and experiences.

Typically, a range of tourism and recreation *values* underpins a visit to the KNP. As a natural area it has spiritual, cultural and biophysical values used by consumers of its services to describe its tourism and recreation opportunity. Tourism and recreation *opportunities* are a means by which a tourist acquires experiences and fulfils aspirations. Some of the aspirations revealed in the Value-laddering hierarchical value maps in 4.3 include the escape motivation, relaxation and play, strengthening family bonds, prestige, social interaction, educational opportunity, self-fulfilment, wish-fulfilment and shopping for park-specific products. Motivation to travel as revealed in the surveys result from the set of needs and attitudes that predispose individuals to act in a specific goal oriented manner. Motivation is therefore an inner state that directs behaviour to achieve specific goals. Natural areas such as the KNP play an important role in both tourist and excursionist satisfaction by providing areas that can potentially offer experiences of challenge, escape, relaxation, self-discovery and spiritual awareness.

The surveys have revealed that tourism and recreational values in the KNP are underpinned by a number of *attributes* that help to make up a recreation opportunity setting and the recreation value of that setting. Attributes are influenced by geographical, social, managerial and intrinsic *factors* such as proximity to markets, accessibility to markets, cultural links, availability of services, affordability, peace and stability, positive market image, pro-tourism policies and availability of attractions. The adequate and effective management of *attributes* will be a major contribution to the total management of the tourism and recreation values of the Park.

 In this thesis, each of the tourism and recreational values, is assessed relative to the dependence of its attributes on the Park, the condition of the attributes, the trend in its condition, pressures on the attribute, knowledge gaps and opportunities. It is an exercise that assesses the overall condition of tourism and recreation values for the Park and the trend in condition or TPC. Based on this assessment the tourism and recreational values become the

basis for the formulation of performance and monitoring indicators. Figure 6.2 present these tourism and recreational values which were generated from the surveys discussed in Chapters 4 and 5.

FIGURE 6.2:   Tourism and recreational values in the KNP
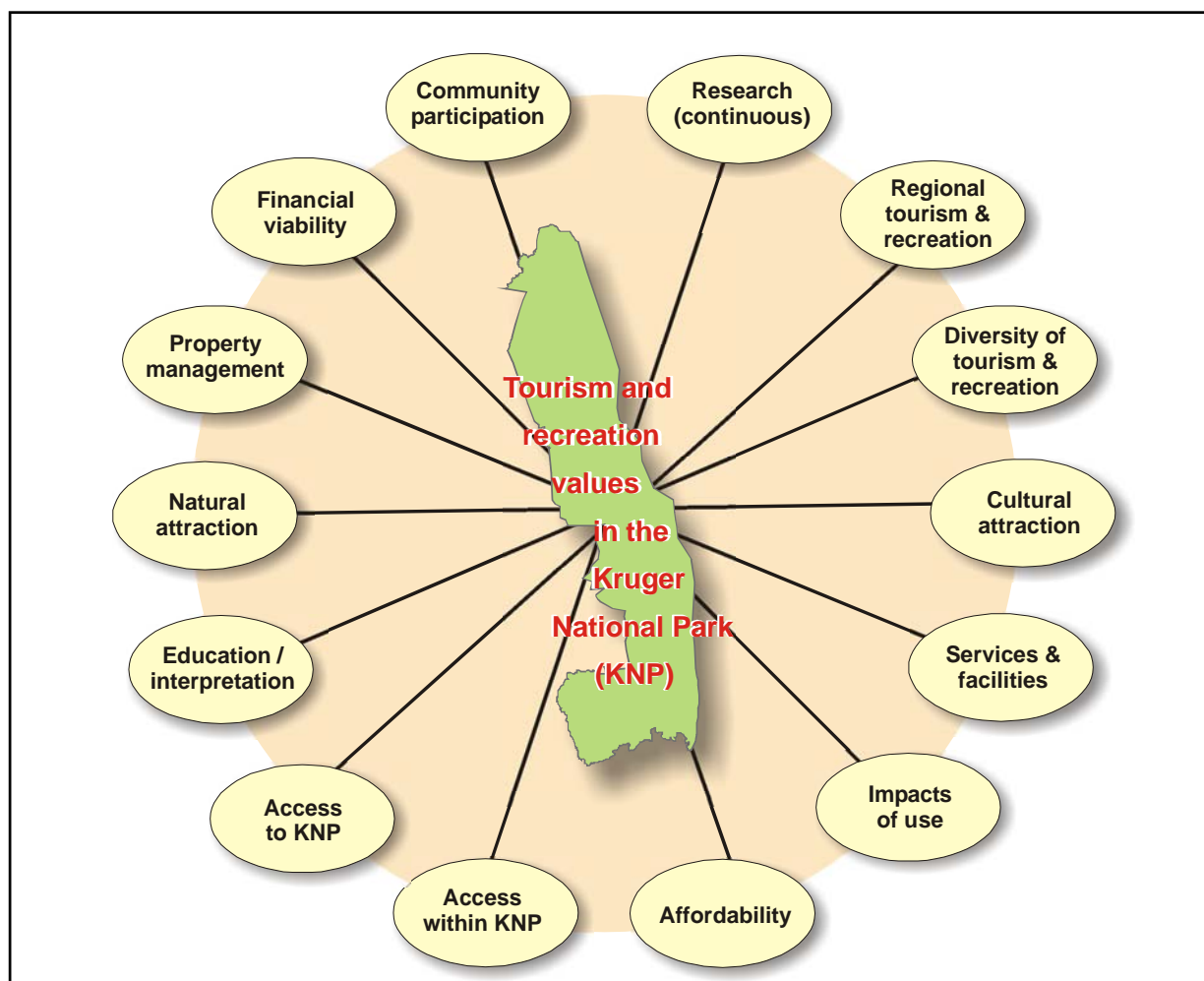
The identified tourism and recreational values (with their attributes) are further discussed and listed in 6.4 and Annexure 14 as a Monitoring and Evaluating Plan.

6.6.2.3   Thresholds of Potential Concerns (TPCs)

According to Biggs & Rodgers (2003) TPCs[47] are a set of operational goals that together define the spatio-temporal heterogeneity condition for which the KNP ecosystem is managed. TPCs are upper and lower levels along a continuum of change in selected environmental

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[47] The concept of TPC is used as a synonym for indicators and limits of acceptable change in this study. The nuances of a TPC are those of being a worry level, a hypothesis to examine or an area of change in an achievable environmental goal (Biggs & Rodgers, 2003).

indicators. When this level is reached or when modelling predicts it will be reached (Steps 5-10), it prompts an assessment of the causes of the extent of change. The assessment provides the basis for deciding whether management action is needed to moderate the change or recalibrate the TPC. TPCs form the basis of an inductive approach to adaptive management as they are invariably hypotheses of limits of acceptable change in ecosystem structure, function and composition. As such, their validity and appropriateness are always open to challenge and they must be adaptively modified as understanding and experience of the system being managed increases. Protected area tourism occurs within the same ecosystem and manifests similar spatio-temporal heterogeneity characteristics as explained in 2.4. The recent strategic review by McKinsey (2002) proposed this adaptive management approach for wider use within SANParks. The identified tourism and recreational values can be converted into TPCs or indicators to measure the limits of acceptable change of the KNP's tourism system.

For example, in the southern KNP there is a clear indication of severe tourist congestion that threatens the quality of game viewing and tranquillity. Public concerns continue to be raised regarding overcrowding on the roads, in public facilities and at animal sightings. This is an indication that a TPC has been reached and prompts management to intervene to improve the situation. The approach calls for further modelling with other tourism and recreational values to determine their current and future conditions. These attributes will be explained in detail in 6.12 and Table 6.2.

6.7   STEP 3 (SPECIFY INDICATORS)

6.7.1   Reasons for hospitality standards (indicators)

In the field of hospitality management the concept of TPCs is synonymous with standards[48]. Prompted by the survey's findings of lack of emphasis on quality assurance and service consistency, a second workshop was convened on 19 and 20 August 2003 to discuss the matter and suggest key areas on which to base the KNP's hospitality standards (indicators or TPCs) for products and services offered. Currently there are no formal measurable standards set to monitor the quality of the hospitality service and products. Implementation of tourism programmes is influenced by what each hospitality manager has experienced in his/her previous workplace. According to the researcher the Park's rest camp accommodation is not graded like hotel and guesthouse establishments to determine the level of service and

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[48] A measure serving as a basis or example or principle to which others conform or should conform or by which accuracy or quality of others is judged (Fowler & Fowler, 1991).

standards to be maintained. In order to deliver predictable service of high quality, the Park's accommodation will have to be graded and standards set. There are many reasons why standards are essential in the KNP:

- standards are a reflection of shared values in the hospitality industry;

- they (standards) are a logical and critical intervention to improve product quality to meet customer expectations;

- they assist in meeting personal values and aspirations of each guest;

- they play a critical role in performance management;

- they can be used to create an organizational culture during the induction process;

- they improve competitiveness and market share;

- they can improve tourist safety, security and health; and

- staff understand what is expected of them and act accordingly[49].

The lack of hospitality standards seriously militates against the attractiveness of the KNP as a holiday destination when compared to lodges on its borders and the private nature reserves. The process of formulating standards that are specific, measurable, attainable, reliable and time-framed (SMART) can be lengthy and tedious (between 6-12 months). It was decided that a standards formulation committee be set up to drive the process that will lead to the finalization of this requirement.

6.7.2   Grading by the Tourism Grading Council

The first step towards establishing measurable standards for the KNP's tourism and hospitality facilities should commence with a formal grading exercise by the Tourism Grading Council of South Africa, better known as the Grading Council. The Grading Councils lays down minimum standards and criteria for allocating star ratings for serviced accommodation (hotels, lodges, guesthouses and bed and breakfast establishments) and caravan and camping facilities. The KNP facilities and service would fall within both categories (serviced accommodation and caravan and camping facilities). The wildlife product would be excluded from this grading exercise.

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[49] Workshop held at Skukuza on 19-20th August 2003

Minimum general standards for serviced accommodation establishments and caravan parks include the following:

- maintenance of a high degree of general safety and security;
- a high standard of cleanliness and comfort fit for the purpose intended;
- compliance with relevant statutory requirements such as business license, registration, public liability insurance, health and safety certificates, safe buildings, etc.;
- accessibility throughout the year except during renovations;
- offering high standards of courtesy to tourists and dealing with complaints promptly; and
- friendly and efficient service, marketing, reservations and pricing approach appropriate to the style of the establishment (Tourism Grading Council of South Africa, 2002).

The elements for **hotel accommodation,** as defined by the Grading Council, is based on guests' expectations and covers the following areas:

- physical structures (exterior of the buildings);
- bedrooms;
- bathrooms;
- public areas;
- dining facilities;
- food and beverage;
- services and service; and
- housekeeping.

The Grading Council defines the elements for **caravan and camping facilities** to include the following:

- exterior of buildings and grounds;
- sites;
- ablutions / bathrooms;
- scullery;
- laundry;

- communal / public areas;

- housekeeping; and

- general conditions of the hotel environment (Tourism Grading Council of South Africa, 2002).

The process of grading all tourism and recreation facilities in the KNP may take approximately six months or more to go through every tourism and recreation value item. Once the camps have been graded and star-rated, the process of determining standards based on guest expectations in accordance with the grading, can commence. A pilot study was fast-tracked for Skukuza rest camp to test the idea[50].

6.7.3   Formulating hospitality standards

6.7.3.1   Process

Formulating standards for a tourism establishment like a hotel and restaurant involves observations and research that happens over an extended period of time. It is even more difficult in the case of the KNP where tourism imperatives would have to be balanced with the KNP conservation ethic. The exercise of standards formulation in itself will be a long process rather than an event. The following steps are critical and involve the following processes:

- establish a KNP Standards Steering Committee;

- form Standards Generating Forums in the regions of the KNP to feed suggestions to the Standards Steering Committee;

- link with external Standards Generating Bodies via the Tourism Hospitality Education and Training Authority (THETA);

- grading process facilitated by the Tourism Grading Council of South Africa, (discussed in 6.7.2).

- external assistance with the development of templates, writing text, presentation and facilitation;

- effective communication and staff training for delivery; and

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[50] Skukuza Camp was graded as a pilot study from July to November 2003. The stars rating ranged from two stars for camping sites, three stars for ordinary budget huts and four stars for both guesthouses and river view semi-luxury huts. Additional recommendations were made to improve privacy of the 4-star graded units.

- effective quality assurance and evaluation systems[51].

The functions of the KNP Standards Steering Committee are to coordinate various structures, regions, concession partners, tour operators and the Tourism Department at Head Office during the formulation process. It will also seek to establish a reliable feedback system into the entire process of developing a tourism management plan. The detailed process of standards formulation will be based on specific areas and items of the KNP's tourism system.

6.7.4 Potential areas for hospitality standards

There are many areas that require standards setting and implementation[52] in the life of a tourism establishment like the KNP. It is beyond the scope of this research study to explain in detail how each standard will be developed and maintained. However, it is within the project's scope to identify some of the areas that deserve attention. Such standards will ensure that, from the initial stage of booking a holiday until checking out, tourists receive value for their money and enjoy an unforgettable experience. Several such areas are stated below:

6.7.4.1   Reservation systems

Telephone etiquette	Walk-ins
Telephonic/facsimile bookings	Internet bookings
Wild Card loyalty programme	Conference/group bookings
Cancellation procedures	Handling of payments/refunds
Booking confirmation	Complimentary bookings (official)
Pensioners' bookings	Last-minute bookings

6.7.4.2   Front office

Entrance gates	- arrival, departure and security checks
Wild Card fast access	- swiping gate to be constructed at all entrances
Telephone etiquette at reception	
Check-in and check-out at reception	- how long should a tourist stand in a queue
Control procedure	
Tourist information service	- rules and regulations for tourist safety

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[51] Workshop held at Skukuza on 19-20th August 2003.
[52] The potential areas for standardization were identified by the working groups of the Workshop of 19-20th August 2003 and were improved and arranged by the researcher.

<table>
<tr><td></td><td>camp gate closure times, payable rates,
services and products offered, directional maps,
latest sightings, recreation facilities
such as swimming pools, telephones,
emergency and medical services, etc.</td></tr>
<tr><td>Tourist escort service from
reception to accommodation</td><td>- often tourists get lost trying to locate
their allocated accommodation units.</td></tr>
</table>

6.7.4.3   General appearance of staff

Uniform	Tourist etiquette

6.7.4.4   Architectural and building design specifications

Design of physical buildings	
Interior décor and finishing touches	
Maintenance control	- reporting, fixing and feedback
Water quality control	
Waste removal	

6.7.4.5   Housekeeping

Public areas	- common cooking kitchens, day-visitor areas, swimming pools and others
Ablutions	
Laundry services	
Camping sites	- electrical points, braai stands, dust bins, ablutions, landscaping
Linen, bed sizes, furnishing and curtaining	
Utensils and crockery for self catering	
Unit servicing	- making beds, cleaning and customer care
Pest control	- given earlier complaints about bats and cockroaches
Lost property	
Stock control	- linen room and units

Grounds and gardening

Filling stations   - fuel

Procurement

6.7.4.6 Accommodation

Unit grading   - stars rating

Refurbishing and upgrading   - category and types;

Aesthetic aspects

Facilities for people with disabilities   - access

Occupational health and safety   - especially at public swimming pools

Information pack in rooms

Guest questionnaires   - "Did we meet your expectations?

Maps

Directory of services

Marketing information

Camping

Signage specification

Control of people and staff movement

6.7.4.7 Maintenance of camp wilderness qualities

Control of vehicle movement   - in the camp with late permits

Staff movement   - between the workplace and

                                         residential compounds

Noise control   - late-night partying (tourists)

                                         and early morning staff shifts

Control of problem animals   - in the camps

6.7.4.8 Educational interpretation service

Tourist information sessions   - videos, lectures and film shows

Day walks

Day and night safari game drives

Trails

4x4 trails

Information centres

Environmental education school groups

Science tourism special groups

The development and maintenance of best practice norms and standards on the listed items or activities will enable management to manage possible impacts or pressures that might bear on the facilities and services which are discussed below. Currently these are managed on *ad hoc* and inconsistent manner.

6.8   PRESSURE ON SERVICES AND FACILITIES

6.8.1   Infrastructure maintenance

The existing facilities were developed over a period of approximately 75 years and are not necessarily compatible with modern design, safety and maintenance standards. They may be having an unacceptable environmental impact and/or are inadequate to satisfy existing or projected tourism demand and use patterns. A major review of existing facilities is required and clearer priorities for maintenance and upgrading of facilities or removal need to be developed to ensure that conservation and recreation objectives can both be met in a management environment of limited resources. Some facilities may need to be temporarily or permanently closed or maintained to a reduced standard[53].

In this proposed management plan the KNP will undertake a systematic review of all tourism and recreational facilities in the Park to determine their environmental impact, maintenance requirements and costs, any hazards to public safety and the current and projected demand for those facilities. The review will be used in the management plan that will be finally submitted to the Minister (in accordance with The National Environmental Management: Biodiversity Bill, 2003 referred to in 2.8.2) to develop priorities for maintenance or upgrading and the basis for allocation of the capital and maintenance budgets.

Closely related to the issue of pressure on facilities and services is the problem associated with the lack of programmes to monitor tourist use. If management is not aware of what tourists are doing in different parts of the Park and also what the impact on such activities is, it will be difficult to anticipate challenges and mitigate their impact on facilities and experiences.

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6.8.2   Tourist-use monitoring programmes

Tourist-use monitoring programmes are widely used in North America, Australasia and South East Asia. They are essentially established and maintained, in cooperation with relevant interest groups, with the following objectives to:

- determine the pattern of recreation use including locations, types of use, number of tourists and seasonal distribution of use;
- identify tourist needs;
- identify and, where possible, quantify tourist impacts on the Park's natural and cultural features; and
- provide a more objective basis for future management of tourism and recreation in the Park.

The KNP will progressively research, implement and promote similar tourist use monitoring programmes but customized for its own tourist health and safety through:

- regular inspection and assessment of tourist facilities;
- identification and adoption of appropriate tourist facility standards;
- incident analysis and assessment of groups at risk; and
- targeting of tourist safety information programmes to groups at risk[54].

There are no known examples of tourist-use management programmes in South Africa or elsewhere in Africa, except for rules regulating tourist behaviour in national or provincial parks. Some of the well-known tourist-use management programmes identified by Eagles *et al.* (2002) and widely used in the USA, Canada and Australia include the following (see also 2.6.2):

- **Limits of Acceptable Change (LAC):** the process of identifying appropriate and acceptable resource and social conditions and the actions needed to protect or achieve those desired conditions. It involves the following nine action steps:

  - identify areas of concerns and issues;
  - define and describe opportunity classes (based on the concept of the ROZ Plan);

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- select indicators of resources and social conditions;

- draw an inventory of existing resources and social conditions;

- specify standards for resource and social indicators for each opportunity class;

- identify alternative opportunity-class allocations;

- identify management actions for each alternative;

- evaluate and select preferred alternatives; and

- implement actions and monitor conditions (Eagles *et al.*, 2002).

- **Visitor Impact Management (VIM):** a process that addresses three basic issues relating to impact: problem conditions, potential causal factors and potential management strategies. It was developed and researched for the USA National Park Service, USA Wildlife & Fish Service and USA Forestry Department. It involves the following eight action steps:

    - conduct pre-assessment database review;

    - review management objectives;

    - select key indicators;

    - select standards for key impact indicators;

    - compare standards and existing conditions;

    - identify probable causes of impacts;

    - identify management strategies; and

    - implement (Eagles *et al.*, 2002).

- **Visitor Experience Resource Protection (VERP)**: a new model dealing with carrying capacity in terms of the quality of resources and the quality of tourist experience (refer to 2.6.2.2). It contains a prescription for desired future resource and social conditions, defining what levels of use are appropriate, where, when and why. This programme was developed by the USA National Park Service for use in its national parks with high tourist numbers like Yellowstone and Yosemite. It involves the following steps:

    - assemble a multidisciplinary project team;

    - develop a public involvement strategy;

    - develop statements of park purpose, significance and primary interpretive themes; identify planning mandates and constraints;

    - analyse park resources and existing tourist use;

    - describe a potential of tourist experiences and resource conditions (potential prescriptive zones);

- allocate the potential zones to specific locations within the park (prescriptive management zones);

- select indicators and specify standards for each zone; develop a monitoring plan;

- monitor resource and social indicators; and

- take management actions (Giongo *et al.*, 1994, Eagles *et al.*, 2002).

- **Visitor Activity Management Planning (VAMP)**: a model developed by Parks Canada to provide guidance for planning and management of new parks, developing parks and established parks. The process uses a model based on a hierarchy of decisions within the management framework. Management plan decisions relate to the selection and creation of opportunities for tourists to experience the Park's heritage settings through appropriate educational and recreational activities. It involves the following action steps:

  - develop terms of reference for the project;
  - confirm existing park purpose and objectives statement;
  - organize a database describing park ecosystems and settings, potential tourist educational and recreational opportunities, existing tourist activities and services and the regional context;
  - produce alternative tourist activity concepts for these settings, experiences to be supported, tourist market segments, levels of service guidelines and roles of the region and the tourism industry;
  - create a park management plan, including the park's purpose and role, management objectives and guidelines, regional relationships and the role of the tourism industry; and
  - implement – set priorities for park conservation and park-service planning (Giongo *et al.*, 1994; Holden, 2000, Eagles *et al.*, 2002).

- **The last of these models is the ROZ Plan,** which was discussed in Chapter 3. It means the division of a park into a hierarchy of management areas or zones based on the pristine state and potential use to control the impact of human use.

There are both advantages and disadvantages for each of the above tourist-use management programmes and their application to individual protected areas will depend on the suitability of the option in addressing the Park's regional and national challenges. It will also depend on the availability of resources to scientifically carry out such programmes. The KNP has made

extensive investments in the ROZ Plan option and initial efforts should be focused on implementing what is already known about the ROZ Plan before attempting other options that are equally necessary to manage the increasing number of tourists to the Park. For example, the full potential of tourism and recreational opportunities of wilderness areas in the KNP have not been comprehensively utilized. There is room to introduce more wilderness trails and low-impact ecotourism products with minimal cost.

The KNP's roads network constitutes an important attribute and provides access from outside and within the KNP. This aspect also warrants some guidelines when a tourism management framework is developed.

6.8.3   Carrying capacity of roads

Roads within the Park will be maintained at a standard consistent with their relative high-volume use and their relative importance in providing access to Park features of significant tourism and recreation value. The following actions are needed:

- review the use of public roads in the KNP by heavy vehicles such as busses and trucks, because of their impact on the roads' surface and the increase of traffic within the Park;

- regular review of public roads to ensure that they are managed within acceptable environmental and financial limits, that user conflicts are minimized and appropriate levels of public safety are provided;

- close public roads which are no longer required or which cannot be maintained within acceptable environmental and financial limits, after consultation with relevant interest groups; and

- consultation with the Traffic Departments, local government and tourism organizations leading to the dissemination of appropriate information to Park tourists on public access roads and warning signs to be erected where necessary to promote tourist safety (e.g. the re-routing of traffic on the R40 White River-Hazyview road instead of the Legogote-Numbi R40 to avoid increased crime incidents involving tourists en route to the KNP)[55].

6.8.4   Day visitors

Day visitors constitute the bulk of tourists to the KNP and the lack of adequate facilities dedicated to day visitors is leading to conflict between day visitors and overnight visitors.

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Since the introduction of the Wild Card loyalty programme, public ablutions have been unable to cope with huge numbers of day visitors during peak holiday and weekend periods. There is an urgent need to establish day-visitor facilities similar to the Skukuza Day Centre (outside the main rest camp) in all the regions. This will alleviate the congestion and overcrowding inside rest camps. Pressure is unbearable at the shops, cafeterias, tearooms and picnic-spots due to this sudden surge of tourists to the Park.

In the final management framework a detailed schedule of the assessed tourism and recreation needs should be included to address the above concerns strategically. Once all the elements of the Park's tourism and recreational values are understood and defined, it is possible to draw a list of SMART standards as part of the tourism management framework. The success of any management plan depends on the availability of a suitable and capable human capital.

6.9   HUMAN RESOURCE PLANNING

Human resources are considered the most valuable asset for any organization or company today. A company's edge is no longer found in its products only but in its people as well. The KNP needs a human resource (HR) plan that will generate motivation, performance and good customer relations (Lado & Wilson, 1994). Several aspects of an HR plan should be given priority.

6.9.1   Aims of a Human Resource Plan

These include:
- integrating HR needs into the tourism management plan;
- making front-line staff (e.g. receptionists, rangers, housekeepers, interpretation and educational officers in tourist centres) a visible public expression of the management philosophy of the KNP;
- inculcating a positive relationship between tourists and the park staff; and
- recruiting and employing competent staff that will be better placed to protect the environment, involve local communities and share a positive conservation message with tourists.

To achieve the above aims, a thorough understanding of staff's abilities to deliver on the job is achieved through a job analysis.

6.9.2   Job analysis

A job analysis exercise should be conducted on all tourism-related positions and a specific and detailed job description attached to each job. Job analysis is a systematic process of determining the nature or content of a work assignment through collection of relevant information (see Table 6.1).

TABLE 6.1:   Job analysis process

Planning and staffing	Employee development	Employee maintenance
Current and future staffing needs	Inform employee about performance standards	Determine compensation
Recruiting information	Training	Health and safety
Selection criteria	Performance appraisal	Labour relations to bargain over job responsibilities
Performance results	Career planning	Promotion opportunities

Some aspects of the job analysis process are explained below:

- At the beginning of a work assignment employees should be orientated on work expectations and performance standards to dispel false expectations and avoid later disenchantment.
- Training seminars will help to enhance an employee's performance in specialized areas such as customer service or equipment handling.
- Employees often seek advancement through promotions, thus by clearly communicating job specifications and desirable work outcomes for each job they will be in a better position to measure their own success and growth.
- A job analysis process can provide the criteria for the content and qualifications required for each job on which decisions for compensation can be based:
  - it can safeguard equity by standardizing pay structures;
  - it can be used to identify potential job hazards such as exposure or vulnerability to wildlife contact and help management to minimize risk (e.g. field rangers and guides are always exposed to animal attacks and malaria), and
- With a job analysis discussions with labour unions can be facilitated in times of bargaining for improvement of working conditions (McKenzie & Matthew, 1998).

Once the job analysis process is over, the needs for training and development become apparent and enables management to plan for human resources development.

6.9.3   Human resource development

Training and development is a vital investment in staff and should be strategically planned and focused on the development of employee's fundamental competencies to perform their jobs to the highest standards (Lado & Wilson, 1994). From the survey findings discussed in Chapters 4 and 5, it is recommended that training be provided to KNP tourism staff in the following areas:

- customer service;
- tourist and community relations;
- financial planning and business skills;
- environmental education and interpretation;
- conflict resolution skills;
- ecological research and monitoring;
- public relations and communication; and
- the conservation ethic of the KNP[56].

Equally important to human resource development is the encouragement of team effort among employees.

6.9.4   Organizational development

Organizational development is concerned with an improvement of the energy generated when employees work together. Such programmes contribute to improving the quality of life at work, team building and loyalty (Garavan, 1991). It helps employees to be able to deal with difficult tourists to the Park.

- Career development is focused on helping individual employees to prepare for future upward mobility (promotion) in the organization.
- The benefits for preparing employees include job satisfaction, motivation and a desire to contribute and perform with direction and purpose (Roth *et al.*, 1991).

To achieve this, the KNP will have to enter into partnerships with higher education and training institutions to design certification programmes, educational diplomas or degrees, and apprenticeships/learnerships for continuing professional development.

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With all the necessary skills and capabilities available, it becomes possible for managers to assess the performance of their staff and their organization.

6.9.5 Performance evaluation

Performance evaluation will enable managers to communicate to staff how well they are doing and, if necessary, provide reasons why changes should be made:

- information will be gained through a continuous collection, analysis and evaluation of data on individual employees;
- an effective evaluation system will determine if human resource management is helping to achieve the conservation tourism objectives of the Park; and
- performance evaluation tied to remuneration levels is one way to encourage performance of employees (Khumalo, 2001).

Once the HR and other component plans are in place, it becomes imperative to match the plans to available financial resources. It was alluded earlier in the study that the financial viability of both KNP and SANParks is circumstantial (see 3.13).

6.10 FINANCIAL MANAGEMENT

Financing mechanisms for protected areas rely on a market-based approach of valuating and marketing goods and services (Visser & Erasmus, 2002). This approach is an innovative departure from heavy reliance on ever diminishing state subsidy grants. However, it should be viewed as a complementary alternative to government appropriations and not a substitute (Havard Business Essentials, 2002). An integrated tourism management plan should have a sound financial plan as its strategic component. The financial plan should have components that will support tourism management. The elements in 6.10.1 to 6.10.5 should constitute such a financial plan.

6.10.1 Management of revenue sources (cash management)

The management of all relevant processes and procedures applicable to revenue collection is imperative to achieve the following benefits for the KNP:

- improved revenue flow (cash flow);
- improved cash management and more accurate cash-forecasting ability;
- greater interest earning on investments;

- greater budgetary control and the ability to complete projects timeously;

- improved credit worthiness and reduction in borrowing costs; and

- cash-in exceeding cash-out (Harvard Business Essentials, 2002).

The KNP's revenue generation streams that need closer management are entrance fees, the daily conservation fees (per diem), adventure activities (day walks, night drives, wilderness trails, etc.), accommodation, concession contracts, debtors, interests on investments, rentals for services, donations, fundraising and the government subsidies. This function is strictly regulated by Section 7 of the PFMA (Responsibility for Cash Management and Banking) and it should be emphasized when drawing up a management plan in conjunction with budgeting (South Africa, 1999).

6.10.2 Budgeting

The budgeting process can be incremental, programme-based or zero-based and it must remain an instrument by which expenditures are linked to revenue and park objectives. The budget should reflect the following needs:

- policy objectives;

- financial implications associated with the objectives;

- realistic estimates that allow orderly financial management of activities;

- performance plans; and

- intended outcomes (Whiteley, 2004).

The budget should have the following components:

- Operating budget:
  - compiled for a short-term and normally for a period of one year. It deals with revenue and expenditure on daily activities;
  - consists of operating costs (stock, human resources, technology, telephone, service supplies); and
  - maintenance of existing infrastructure.
- Capital budget, providing for:
  - replacement of assets;
  - expansion of the organization;
  - product diversification; and
  - research into new technological advancements (Whiteley, 2004).

The next step is for managers and their staff to know how to manage financial resources in a manner that optimizes revenue-earning opportunities and prevents wasteful and fruitless expenditure in compliance to the PFMA (South Africa, 1999).

6.10.3   Financial management system

Establish a financial management system for the entire Park and specifically the tourism function:

- as a management information system;
- to provide managers and all staff with rationalized budget information;
- to meet all requirements for recording all accounting transactions;
- to provide an efficient financial control system so that possible areas of over-spending and under-spending may be determined timeously;
- to provide a basis for revenue and cost calculation;
- to provide any additional financial and statistical information;
- to establish standard procedures; and
- to allocate codes to spending objectives to the level of each respective functional unit so that each transaction can be processed according to the relevant responsibility to keep track of the flow of funds and overall expenditure versus the budget (Gitman, 2003).

Linked to the Financial Management System are issues of asset and risk management discussed in 6.10.4.

6.10.4   Other important financial management aspects

- *Asset management* – ensure proper control of assets and keeping of an asset register to be used as part of the for the organization.
- *Risk management* – identify the potential for unwanted and negative consequences and the probability and severity of such adverse effects (e.g. what would happen to the KNP if there would be a terrorist attack on foreign tourists?).
- *Financial and performance reporting* – using the following performance indicators:

    - effectiveness   =   doing the right things;
    - efficiency   =   doing things the right way;
    - economy   =   doing things cheap;

> \- equity = doing right (as being fair) (Whiteley, 2004).

Unfortunately, many of the current tourism staff have no financial management training to contribute effectively in managing the Park's financial resources and budget programmes. It is imperative for these members of staff to receive on-the-job training on financial management.

6.10.5 Financial management training

A programme for the training of non-financial managers for all tourism managers (and managing staff from the natural science departments) should be designed to enable staff to

- understand the contents of financial statements (short term and annual reports);
- appreciate the role of financial reporting and its contribution towards investment decision-making and performance measurement;
- use financial information to comment on the financial position and financial performance of the KNP for the period under review;
- forecast the financial needs of the KNP based on its future operational plans;
- understand the importance of the budgeting process as a means of achieving both a productive work force and financial targets; and
- appreciate the importance of the cost of capital in the value creation process (Gitman, 2003).

It is also imperative for the KNP to grow its business by broadening its market share. This can only happen with the help of an integrated marketing plan.

6.11 MARKETING PLAN

Both marketing and sales are necessary if a business hopes to effectively compete in today's globalized marketplace (Mellot, 1993). Marketing is the foundation upon which sales are done. Marketing seeks out demand, identifies products and services that will satisfy demands, and then employs strategic sales and advertising techniques to reach customers (Van der Walt *et al.*, 1998).

Figure 6.3 presents the basic steps that should be followed in the development of a marketing plan for the KNP.

FIGURE 6.3:   Marketing plan cycle

The plan should help to achieve the following objectives:

- instituting a highly focused national and international marketing initiative for the KNP as a holiday destination to increase market share;

- segmentation of the market with specific market segments profiled to match specific guest facilities and activities;

- development of the KNP brand and brand image as a focused component of marketing activities;

- development of relationships with the travel trade through data base (Internet) marketing, trade visits and trade shows;

- enhancing and expanding relationships with the media whereby a proactive interaction is developed; and

- initiating a suitable and sustainable advertising campaign supported by editorial exposure to increase market awareness, and organizational image[57].

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[57] Workshop held at Skukuza on 19-20th August 2003 (It was decided that a fully integrated marketing plan will use Figure 6.3 as a foundation and will be developed by the Directorate Tourism and Marketing in collaboration with the KNP tourism division; marketing is a corporate-driven function at SANParks)

A well-constructed marketing plan is a blueprint for guiding the sales effort. These self-explanatory six steps, once they have been transformed into an integrated marketing framework, will provide an effective sequence that minimizes wasteful efforts and ensures a systematic approach for increasing sales and market share. The full development of an integrated marketing framework falls outside the scope of this study. After developing most of the components of the tourism plan, it is important to formulate indicators or criteria that will be used in the monitoring and evaluation phase of the management framework. This exercise follows in 6.12.

6.12   EXAMPLE OF AN INTEGRATED MATRIX OF TOURISM AND ENVIRONMENTAL ATTRIBUTES

In 6.6.2.2 of this chapter certain attributes that constitute the tourism experience in the KNP were identified from the results of the surveys. These attributes subsequently contribute to the creation of tourism and recreational values. In Table 6.2 the attributes are converted into performance and monitoring indicators or TPCs for tourism performance by illustrating how they are interlocked as a system, highlighting existing pressures, knowledge gaps and suggesting opportunities for improvement.

6.13   IMPLEMENTATION PLAN

6.13.1   Implementation plan schedule

The implementation of a management plan is a legal requirement in terms of The National Environmental Management: Protected Areas Bill, 2003. Relative priorities and the process of implementation are set out in Table 6.3. These priorities will be determined in the context of the SANParks Directorate and the KNP strategic plans and will be subject to the availability of staff and funds.

6.13.2   Implementation strategies

- Undertake an annual review of progress in implementing the completed management plan.
- Undertake after five years an assessment of the effectiveness of managing the park in accordance with the approved management plan and of the degree of success in achieving the plan's objectives and desired outcomes. Base evaluation on the monitoring and evaluation plan guidelines following below.

Every management plan needs a business plan to facilitate implementation.

TABLE 6.2:   **Matrix of tourism and environmental attributes**

ATTRIBUTE	IMPORTANCE	DEPENDENCE ON THE PARK	TRENDS AND CONDITIONS	PRESSURES	KNOWLEDGE GAPS	OPPORTUNITIES
Central reservations	Vital link between tourists and the Park.	Partial dependence on the reservation office in Skukuza. Large volumes are booked centrally in Pretoria.	Manual system, no internet bookings. Clients hold on too long on the phone. Disparity between booked and available accommodation.	Increasing frustrations from clients. Loss of business to competitors.	Operators do not know the product and are unable to refer clients to camps offering similar alternative products. Most staff are casual and lack commitment.	Introduction of new reservation system, RoomSeeker, might improve current situation. Investigate insourcing / outsourcing options.
Natural attraction	Extraordinary aesthetic scenic beauty and fauna & flora. KNP size, diversity and natural heritage status is nationally and internationally important.	No other national park in the country offers same diversity of species and wilderness qualities.	Tourism has visible effects e.g. road kills, overcrowding, traffic congestion. Trampling of picnic and camping areas. Erosion of trails. Feeding animals. Poaching. Invasives – plants & animals).	Unlimited development for commercial purposes. Increased tourist numbers. Disease outbreaks like Bovine TB, anthrax, foot & mouth, Invasives – plants & animals. Poaching. Poor water quality	Need for scientific knowledge on relationship between tourism and conservation of biodiversity. Lack of monitoring evaluation.	Research to establish baseline levels on environmental-tourism management interaction. Need to establish monitoring systems.
Cultural attraction	Rich and diverse cultural setting of local communities, prehistoric African Kingdoms e.g. Thulamela, Masorini, Alabassini, Bushman rock art, Cultural heritage nationally important.	Intrinsic and historic cultural heritage values are completely reliant on Park setting and importance.	Conditions of Thulamela, Masorini and Albassini are generally good. Need to map Bushman rock art and other cultural sites of the indigenous homes of evicted communities. Interpretation of cultural sites is poor and needs upgrading.	Issues associated with access, use, maintenance and interpretation. Direct pressure from communities who demand formal recognition. Land claims by the Baphalaborwa, Ntimane, Tenbosch possible threat. KNP might become a series of conservancies managed by communities.	Knowledge is needed about the cultural history of the Park, including detailed local history along with understanding of the Park's relevance to local communities.	Further recognition and appreciation of local history and cultures through the development of cultural tourism. Improve interpretation services with information outlets. Providing alternative compensation to successful claimants to retain a contiguous KNP. *… continues*

TABLE 6.2:   Matrix of tourism and environmental attributes (continued)

ATTRIBUTE	IMPORTANCE	DEPENDENCE ON THE PARK	TRENDS AND CONDITIONS	PRESSURES	KNOWLEDGE GAPS	OPPORTUNITIES
Access to destination	Park is accessible by road through 9 entrance gates connecting to major roads. Majority of tourists come by cars, some by coaches and small percentage by air.. Hoedspruit, Kruger Mpumalanga Int and Phalaborwa airports. Access roads are in good condition.	Access and availability of public transport are not dependant on the Park. Good communication lines should be kept open with provincial governments and National Roads Agency.	Recent road improvements improved travel safety. The distance from the KMIA and Hoedspruit airports are a drawback to tourists travelling by air. Air fares extremely high e.g. R2300 return KMIA-JHB. Absence of public bus service curtails individual backpackers.	High maintenance costs for access roads to the Park. Expensive toll gates on both the N1 and N4 discourage motorists from visiting the Park. Traffic congestion during peak holiday seasons especially in the southern region. Effects of crime on travelers e.g. hijackings.	Carrying capacity of key access roads is unknown. The life expectancy of access depends on current conditions and alternative access opportunities e.g. public transport including train services up to Hazyview station.	Co-operation with tiers of government at provincial and local levels to improve roads and transportation systems. Co-operation with the police and community forums to improve tourist safety from crime.
Access within destination	Within the Park there is a major high quality south-north bitumen-sealed road. There's a road network that provides ready access to a wide range of recreation opportunities. Access decisions determine the diversity of recreational opportunities for tourists.	Access system within the Park is dependent on the Park's available resources e.g. roads grant.	Many of the Park's roads infrastructure valued at R1 billion are approaching the end of their life-cycle. Road maintenance has lagged behind and closing poor quality roads to tourists limits their opportunity to experience the Park's diversity.	High maintenance costs for the Parks' roads and trails infrastructure reduces the quality of tourist experience. The visiting public risks accidents and serious injuries, which might lead to liquidations.	Lack of knowledge of tourist use profiles for the different forms of access provided for the Park; cost-benefit analyses of investments in the provisioning and maintenance of access for tourism and recreation and environmental effects of the provision of access.	Improvements in transport efficiencies from gateway towns such as White River, Nelspruit, Komatipoort, Giyani, Hoedspruit, Phalaborwa, Musina and others. Limiting of heavy vehicles (coaches and trucks) on Park roads, and others. *… continues*

TABLE 6.2: Matrix of tourism and environmental attributes (continued)

ATTRIBUTE	IMPORTANCE	DEPENDENCE ON THE PARK	TRENDS AND CONDITIONS	PRESSURES	KNOWLEDGE GAPS	OPPORTUNITIES
Services and facilities	Rest camps, picnic spots, camping, day walks, wilderness trails, game drives, golf, conferencing, food and beverage outlets, signage are important aspects of tourist attraction.	The facilities and services are dependent on the Park's budget and ability to raise sufficient revenue.	High diversity of recreation facilities. Incremental increases of tourist sites is a potential management problem.	Overuse and unsustainable use of facilities; high cost of maintenance; poor quality maintenance and inconsistent design of facilities; pressure from tourist demands.	Lack of tourist feedback on existing services and facilities; tourist movements in the region and Park.	Introduce framework for sustainable management and tourist use limits. Design facilities to meet tourist expectations. Conduct multi-purpose surveys. Set gate quotas. Possible reservation system for day visitors.
Diversity of tourism and recreation facilities	From wilderness trails to the "urban" settings of Skukuza and similar camps, The KNP offers wide range of products from the quiet atmosphere, scenic qualities and the charismatic African mammals.	Totally dependent on the Park's management interventions.	There is no active management planning guidance and policy controls to control the nature of facilities provided at particular settings. There is strong probability of incremental hardening of sites in the absence of such guidance. Complaints of overcrowding are increasing.	Environmental and perceptual impacts are exerting pressure. These are associated with increasing tourist numbers and new activities. More vehicles on the road are a visible impact. Potential for conflict between tourist groups and within groups. Heavy congestion during weekends and holidays.	Absence of a recreation opportunity setting management model for tourism and recreation. Lack of information about activities and tourist use including trends.	Establishment of competency and capacity to manage for recreation opportunities and supply and demand. Establish programmes that will foster appreciation and enjoyment of natural and cultural heritage. Involve local tourism authorities and tour operators. *… continues*

TABLE 6.2:   Matrix of tourism and environmental attributes (continued)

ATTRIBUTE	IMPORTANCE	DEPENDENCE ON THE PARK	TRENDS AND CONDITIONS	PRESSURES	KNOWLEDGE GAPS	OPPORTUNITIES
Education and Interpretation	KNP provides rich opportunities for informal experiential learning and for education through formal classes, study groups and major conferences. Aspects of the Park's heritage are part of the national education curriculum. Interpretation is the key to convey education.	Park plays essential role in setting the scene for educational and interpretation opportunities. Many aspects of the educational experience are park dependent.	Whilst there is a range of environmental educational programmes linked to the Park, there could be far more. Poor link between the Park and learning groups. No formal links with local education departments. Lack of tourist centres for educational and learning purposes.	Poor knowledge on the intrinsic values of the Park including cultural heritage values. Too few opportunities for the growing number of tourists. Lack of diversity in the educational experience (natural science only). No system of establishing minimum standards of Interpreters/educators in the Park.	More knowledge is needed on the educational use of the Park. Market research should be conducted to identify opportunities for educational use and the type of education experiences that attracts tourists.	Facilitating the potential for educational /interpretation use of the Park. This could involve the provision of a range of educational activities, including activities prior to arrival at the destination. Collaboration with tour operators to assist with educational experience.
Impact of use	Impacts of use need to be managed to retain the tourism and recreation values of the Park. Tourism and recreation needs to be sustainable and based on environmental management performance that meets agreed performance targets. Quantifiable environmental management performance outcomes are possible under a benchmarking system.	Dependent on the Park and the cooperation of the tourism industry, government and local communities.	The global environmental criteria identified by Agenda 21 for the travel and tourism industry give criteria for managing impacts. This document helped to underpin a global environmental certification scheme for travel and tourism called Green Globe 21. It recognizes 10 key performance areas for environmental and social management performance by the tourism industry.	Lack of active management of tourism and recreation and limits of tourist use. Absence of monitoring of tourist use. Lack of monitoring of the environmental performance management of tourism and recreation. Lack of active and applied tourism and recreation research programme and the adaptive use of its findings; poor management of services and facilities and overcrowding, including supply and demand.	Need for quantified environmental performance baseline levels for key criteria specific to the KNP and for supplementary indicators for monitoring.	Opportunity to introduce a tourism performance evaluation system through - adaptive research, - continuous improvement in environmental performance, - limits of use for destinations and active, - continuous and professional management of tourism and - recreation in the Park. *… continues*

TABLE 6.2:   Matrix of tourism and environmental indicators (continued)

INDICATOR	IMPORTANCE	DEPENDENCE ON THE PARK	TRENDS AND CONDITIONS	PRESSURES	KNOWLEDGE GAPS	OPPORTUNITIES
Financial viability	Without adequate financing the Park cannot deliver on its mission and mandate. Government is directing public resources to more pressing socio-economic causes as a result of Apartheid imbalances. The Park should use its resources optimally without sacrificing ecological integrity.	Dependent on the Park's innovative use of its natural assets.	Poor financial performance. Inability of the system to optimally collect payable fees. Massive fraudulent activities at receptions. Lack of training in business / commercial operations.	Difficulties in financing capital and maintenance projects. Inability to meet competitive packages to attract best qualified staff. Lack of funds to finance programmes such as marketing and community development funds.	Financial and business management skills. Lack of knowledge in international fundraising (Foundations, World Bank, Global Environmental Fund, GTZ).	Improve revenue collection system and plug leakages. Provide training in the business and financial field. Create new revenue generating options other than entrance fees. Raise loan/grant funding with IDC/DBSA and others for product development.
Affordability	Affordability and diversity of costs of recreational and tourism opportunities are imperative at local, regional and international level. Multi-tiered systems can meet the various needs of markets and local people.	Affordability is influenced by a range of costs associated with providing services, market trends and economic climate.	Park offers different packages to different market segments. Differential pricing has been introduced for admission. Prices are affordable although recent price hikes have been met with opposition mainly by tour operators.	Adjacent communities demand "flat rates". Tour operators are unhappy with the conservation fee paid by overseas tourists per day in addition to their accommodation and subsistence costs. Increases are caused by high costs of maintenance, shrinking allocations for government subsidies and other causes.	Lack of detailed information on the actual cost of providing services and facilities for tourism and recreation opportunities. Lack of state funding formula for environmental management.	Recognition of the actual costs borne in the provision of tourism and recreation opportunities provided by the KNP. Explanation to the public how revenue collected is spent in improvement of facilities for public enjoyment. Provide the state with actual funding needs for conservation based on real costs of environmental management.

… continues

TABLE 6.2: Matrix of tourism and environmental attributes (continued)

ATTRIBUTE	IMPORTANCE	DEPENDENCE ON THE PARK	TRENDS AND CONDITIONS	PRESSURES	KNOWLEDGE GAPS	OPPORTUNITIES
Community participation	Community involvement in the Park's activities is crucial for the Park's future survival. It is a universal call of the Conference of Parties 7, of the CBD, to involve communities in protected areas management.	Dependent on both the Park's sincerity and the community's preparedness to accept responsibilities.	There exist a few programmes but more could be done.	Communities demand tangible benefits rather than just jobs. The new legislation will make it obligatory for the Park to formally involve communities in policy-making and benefit sharing schemes.	Lack of social research on awareness levels, opportunities for community development and facilitation.	Fast-track projects like Mariyeta, Mhinga and Mdluli contractual Parks to enable communities with land to participate in ecotourism development. Encourage partnerships on community development schemes. Contribute a financial portion of the tourism business to worthy community projects. Identify new contractual parties on communal lands e.g. Bushbuck-ridge and the Rooibos bushveld in the KNP.
Regional tourism and recreation opportunities	Regional tourism complements the Park. The region is of national significance as a tourism destination.	The region complements the Park and there is interdependency.	To facilitate cooperative management and redirect tourism demand to equally attractive destinations. Integrated approach to tourism management brings massive improvements.	Demands for more facilities in the KNP exert more pressure on the Park. Changes in land use in adjacent areas to the Park e.g. Malelane, Komatipoort-Marloth Park, Hazyview, Phalaborwa, and others. Increased demand for more commercial opportunities in the Park.	Lack of information about the diversity of recreation opportunities and tourist activities across the region and how the KNP contributes to these.	Coordination and integration between KNP, provincial tourism should be harnessed to develop a clear regional tourism strategy. The diversity of tourism opportunities in the region should be encouraged to promote the region as a distinct destination.

TABLE 6.3:   Implementation plan schedule

Activity	Participants	Priority	Target date
Tourism Mission.	All tourism and conservation staff from KNP and Head Office.	**High**	30 November 2003
Objectives and goals.	All tourism and conservation staff from KNP and Head Office.	**High**	30 November 2003
Financial management plan.	KNP Finance and tourism staff.	**Ongoing**	31 December 2003
Review of existing tourism infrastructure to determine priorities for maintenance and upgrading.	KNP Hospitality, Technical Services and Tourism Managers.	**High**	31 March 2004
Business Plan.	Finance, Tourism and Fundraising managers.	**Ongoing**	1 April 2004
Drawing of a socio-ecological plan to balance tourism and recreation values with conservation and social imperatives.	KNP scientists, ecologists, Tourism managers and social ecologists.	**High**	30 June 2004
Human resource plan with job analysis, performance management systems, training.	Tourism staff and HR department.	**Medium**	30 June 2004
Development of a marketing plan.	KNP & Head Office staff.	**High**	30 June 2004
Grading of the tourism facilities and services.	Tourism Grading Council in consultation with KNP tourism staff.	**High**	31 July 2004
Formulation of hospitality standards or indicators to guide and measure service and product quality.	KNP tourism staff, THETA, Tourism Grading Council.	**High**	31 October 2004
Formulation of environmental indicators/ standards to guide and measure tourist experience.	KNP ecologists, scientists, game rangers and tourism staff.	**High**	31 October 2004
Tourist management programmes.	Tourism and conservation staff.	**Ongoing**	31 December 2004 (two six months interval surveys must have been carried out)
Research to help understand natural, cultural and tourism resources for effective management.	Natural and Social researchers.	**Ongoing**	Need for base-line tourism research by 31 December 2004
Finalization of tourism management plan.	All staff in tourism, approval by the SANParks Directorate, Board and the Minister.	**Medium**	31 March 2005
Plan review.	All KNP and Head Office tourism and conservation staff.	**Low**	31 March 2009

KEY to priorities:

High	urgent and/or very important actions already underway or planned for immediate implementation
Medium	actions which are important but not urgent
Low	actions which may be deferred in favour of other priorities
Ongoing	current actions already underway

6.14   DEVELOPMENT OF A BUSINESS PLAN

6.14.1   Why a business management approach?

The idea behind a "business approach" to park management is to encourage protected area managers to view their job, in part, as running a business. However, in this case, unlike in the

private sector, the objective of the business is not to make profit but to improve the management of the protected area and make it financially as well as ecologically and socially sustainable. In terms of the Public Finance Management Act of 1999, section 53(3) … *a public entity (listed in Schedule 3) may not budget for a deficit and may not accumulate surpluses unless the prior written approval of the National Treasury has been obtained* (South Africa, 1999). The KNP is thus a non-profit organ of state. However, it must ensure that it operates on a clean and efficient financial management system and controls.

6.14.2   Development process

In order to pursue new sources of funding a solid business plan should be developed. The basic steps of this process include:

- Defining the activities to be implemented (the socio-ecological and tourism plans);
- Quantifying the financial needs according to the planned activities;
- Identifying existing and new potential funding sources and funding gaps; and
- Developing a fundraising strategy (Havard Business Essentials, 2002).

From the researcher's experience in doing business plans (as Director KNP for the past six years and currently as Chief Executive Officer of SANParks), a business plan should naturally flow from the comprehensive management plan of the protected area. However, the opposite is also true: that it is best if the business plan is developed in concert with the management plan so that they may influence each other. For example, if planned management activities in the short term are financially unrealistic, this will emerge during the business planning process and the management plan can be adjusted accordingly. But it should be understood that, by and large, the business plan is a means of achieving the management plan, not the other way around. Ultimately, the financial details and funding sources identified in the business plan will be incorporated into the management plan. Khumalo (2001), concurs with the two way approach of doing business plans explained above.

A business plan will also contain the key performance areas (KPAs) for the management of the protected area with set targets. This exercise may become too detailed and Park-specific and does not form part of the current exercise in this study.

6.15   MONITORING AND EVALUATION PLAN

6.15.1   Why monitoring and evaluation?

In Chapter 2 (2.9.1) the need for developing a monitoring and evaluation tool or plan for a protected area was alluded to. The IUCN has developed a framework that can be adapted to suit the objectives and prevalent conditions in a specific park. It is imperative to develop clear criteria for assessments, trends, outcomes and outputs. Monitoring is a systematic and periodic measurement of key indicators of biophysical and social conditions. Systematic implies that there should be an explicit plan with set indicators and predetermined stages of monitoring.   Monitoring requires ample funding, trained personnel, access to data and sufficient time to implement the monitoring programme. At the workshop of 16-17th July 2003 participants agreed that the monitoring of tourism in the KNP should be on:

- **monitoring tourist impacts**: Tourists to the Park bring both environmental and social impacts. Measurable indicators must be developed to allow periodic assessments of such impacts and to determine corrective action; and

- **monitoring service quality**: This will involve collecting, analysing and evaluating information about the fulfilment of tourist needs and expectations.

6.15.2   Who should monitor?

Staff should be appropriately trained to perform audits, but the help of the following people can also be enlisted:

- field staff and rangers;
- the local community;
- tourists;
- tour operators; and
- researchers from institutions of higher learning or research bodies.

6.15.3   Steps to develop and implement a monitoring plan

6.15.3.1   Planning for monitoring

- form a steering committee; and
- hold a meeting with role-players and agree on terms of reference.

6.15.3.2   Developing a monitoring plan

- identify impacts and indicators to be monitored;
- select methods of measurement;
- identify limits of acceptable change; and
- develop an operational monitoring plan.

6.15.3.3   Conducting monitoring and applying results

- train staff, managers and other role-players;
- carry out monitoring and examine data; and
- present monitoring results.

6.15.3.4   Evaluation

- evaluate the effectiveness, reliability and validity of the monitoring programme; and
- reiterate results and apply lessons learned to improve the situation to achieve desirable results.

6.15.3.5   Monitoring instruments

The researcher recommends the following instruments to monitor service quality:

- interviews and personal visits to guests;
- comment book;
- suggestion box;
- mystery customers[58];
- unannounced visits by management; and
- tourist questionnaire.

Measuring i.e. monitoring environmental and social impacts will take time to accomplish but the researcher suggests an evaluation technique based on the identified tourism and recreational values (see 6.6.2.2). The instrument will need to be standardized until it can lead to repeatable results from which reliable evaluation conclusions can be drawn. A lot of piloting

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[58] This is a methodology used in the tourism industry to ascertain the performance and levels of service delivery of a tourism establishment through the eyes of the customer.

and statistical adjustments would have to take place before this instrument can be adopted. An example of a single item (Table 6.4) is included below and the rest of the items appear in Annexure 15.

Concepts such as "condition" and "trend in condition" can mean many things and apply to attributes in many ways. For the purposes of this monitoring and evaluation exercise and the workshop activities from which this table was derived, these terms have been generally used to refer to the principal components of the attributes determined as being significant (e.g. natural value of the KNP) and an interpretation of the condition status of those attributes. The trend in condition simply refers to whether the attribute's condition is static, improving or declining in its condition.

TABLE 6.4:   Natural attraction value

ATTRIBUTES	CRITERIA FOR ASSESSMENT	EVALUATION					MONITORING				
		Excellent	Very good	Satisfactory	Poor	Very poor	Improving generally	Improving slightly	No visible/net change	Declining in some areas	Widespread
NATURAL SCENERY	Undisturbed, no human structures										
WILDLIFE	Presence of various species of animals and plants										
WILDERNESS QUALITIES	Atmosphere of peace and tranquility										
SOILS	Non-eroded, non-compacted trails, campsites, picnic spots, etc.										
WATER QUALITY	Unpolluted rivers/ streams										
STATUS OF AIR QUALITY	Unpolluted air, green-house gas emissions minimized										
NATURAL NOISE LEVEL	No artificial noise										
LIGHT IMPACTS	Electric light system promotes opportunity to experience night life and the stars without light pollution										
OVERCROWDING	Noise control in camps										
BUILDINGS	Appearance of buildings blends with environment										

Each of the attributes can be rated on a 1-5 Likert Scale to assess its condition. The rated score can be balanced by marking with X the trend of each criteria assessed. Where appropriate qualitative remarks can be added to substantiate or add perspective on the indicators that are being measured. To improve monitoring and evaluation tools continuous research must be encouraged in the field of tourism management.

6.16   TOURISM RESEARCH

The need for continuous research in the field of tourism was identified as one of the attributes that can add value to tourism and recreation. The primary function of research is to assist in the understanding of the KNP's natural and cultural resources and use and to provide information that will contribute to effective management. There is an urgent need to conduct more surveys and research on aspects such as market segmentation, tourist profiles, seasonality, customer satisfaction, service quality, tourist needs, tourism impacts on biodiversity and the Park's resources, infrastructure and suitability of facilities, opportunities for additional tourism and recreational experiences, levels of community participation and many other areas of the subject. Such research should provide an adequate basis for improved park management and effectiveness.

6.17   CONCLUSION

The objective of this chapter was to suggest a framework or helicopter's view of guidelines that can be used to develop an integrated tourism management framework for the KNP. It charts the process to be followed by KNP managers and stakeholders when developing an integrated tourism management plan. In terms of the current conservation law reform process in South Africa (driven by DEAT) the task of developing a management plan is no longer an exclusive preserve of the "expert" alone but a collaborative process that involves various stakeholders from within and outside the KNP. An "expert" such as the researcher can only suggest a guide, framework or roadmap to be followed. The development of a management plan is a public participatory process that must be underpinned by the principles of transparency, consultation and honesty. However, KNP managers have an inalienable primary obligation of developing a business plan that will be based on the management plan. The new protected area law reform process compels protected areas to produce benefits beyond their boundaries for the socio-economic benefit of communities that live around the Park and the intention to this effect should be reflected in the development of a management plan.

Furthermore, this chapter suggests the adoption of the IUCN definition (see Table 1.1) of a national park and the IUCN evaluation framework on management effectiveness to guide the process of developing a tourism management plan. The researcher noted with concern that DEAT did not follow the IUCN classification in the drafting of the The National Environmental Management: Biodiversity Bill, 2003, currently being tabled in parliament. This move might become problematic for South African conservation agencies when participating at international platforms where protected area classification is involved.

Integration means the comprehensive coverage of biodiversity conservation, recreational activities, financial imperatives, social needs, business and governance practices to ensure the Park's survival and self-reliance. In this chapter the conservation ethic and policy guidelines were identified within which tourism facilities and services should be provided for both the enjoyment of the public and protection of the Park's ecological integrity. The mission, objectives and goals of providing tourism and recreational services were developed within the context of the adaptive management philosophy that accepts the view that the successful delivery of tourism services and products depends on the continuous adaptation and improvements of quality, strategy and techniques. To develop service quality and standards the KNP's facilities must be graded in accordance with the requirements of the Tourism Grading Council. Tourism does not exist in a vacuum but in a complex and often unpredictable environment that continuously reinvents itself. The preferences of tourism consumers change frequently and an adaptive tourism system is more likely to continue to meet the needs of its clients than a static and inflexible system would.

In this chapter, fourteen (14) tourism and recreational values that underpin tourism service-delivery in the KNP were identified. They have been evaluated and found to be in varied conditions, subject to various pressures. These tourism and recreational values represent attributes that attract tourists to the KNP and should be used as indicators for measuring management effectiveness and customer satisfaction levels. The success of the KNP's tourism product and services will depend heavily on the active and competent management of the identified tourism and recreational values. This can be achieved through an adaptive management approach that focuses on:

- sustainable use of resources;
- limits of tourist use management;
- environmental performance audit (with attributes);
- sound financial, human resources, marketing and corporate governance practices;
- proper grading of products and services;

- setting of hospitality and quality assurance standards;
- applying business management principles to conservation;
- designing practical monitoring and evaluation plans to assess tourism performance;
- active involvement of communities in protected area management; and
- continuous tourism-research activities.

There is an urgent need for the professional management of tourism in the KNP through a balanced and integrated tourism management framework as suggested in this study. Such a move will contribute to the effective management of the Park by generating sufficient revenue to implement all activities associated with its mandate. In an almost infinitely diverse world there can never be just one standard methodology or type of management plan. The challenge is to develop a scientifically researched "toolbox" of approaches that are derived from a single broad conceptual framework over an extended period of time. This study alone is but a small step towards the establishment of a solid research baseline on which to base the development of the KNP's tourism management plan. An integrated approach that goes beyond the traditional focus on biodiversity conservation, as suggested in this framework, is but one of the many potential solutions to the lack of effective management of the tourism function in protected areas.

In the last chapter of this study the overall and specific findings, recommendations and shortcomings are presented in conclusion to the research project.

CHAPTER 7

FINDINGS, RECOMMENDATIONS AND SHORTCOMINGS OF THE STUDY

This chapter concludes this research study by synthesizing findings, recommendations and shortcomings of the thesis. It summarizes first the overall findings and recommendations of the entire study and secondly the specific findings and recommendations of the research objectives per chapter. Shortcomings and further areas for future research are also highlighted.

7.1 RESOLUTION OF THE RESEARCH PROBLEM

7.1.1 Terms of reference

The research problem, which served as the terms of reference for the study, was based on the premise that the KNP lacks an integrated tourism policy statement (management plan) constructed from scientific data to guide and balance tourism service delivery with conservation and community involvement objectives. The lack of an integrated tourism management plan created different meanings and interpretations of tourism recreational values, poor understanding of tourists' needs, inconsistent norms and standards of service levels, financial under-performance, poor maintenance of infrastructure, exclusion of communities from active participation and lack of performance indicators to measure tourism service quality and human use impacts on the environment.

7.1.2 Overall findings

Tourism and recreational values are not adequately recognized and managed in the Park's current management plan that, in the first place, should incorporate strategies for their conservation. The knowledge base for tourism and recreational values and tourist needs is fragmented, uncoordinated, rigid and overtaken by market trends. The KNP's tourism staff, from housekeeping to management, is largely under-prepared and untrained for their operational responsibilities. There are no clear human resource plans or financial performance plans to drive tourism. The pressure on the Park's ecosystems and ecological processes, as a result of the increase of tourist use and intensification of regional developments on its southern and western boundaries, threatens the natural attractiveness of the KNP as a nature-based holiday destination. The reality of minimal financial returns on the

tourism business caused by the lack of professional capabilities to manage tourism contributes to the Park's inability to adequately maintain tourism facilities leading to inability to meet growing demand. This inability to maintain tourism facilities erodes the quality of the product and debilitates the tourism value of the Park. The lack of service quality standards, indicators and measurement instruments to assess profound tourism impacts on the Park's values is cause for concern. Although the survey on community participation revealed the existence of positive relationships between the adjacent communities and the KNP, the significant social values and dimensions are largely unknown at this stage. Such values must be recognized as distinct from, but potentially arising from other values including recreation, aesthetics, personal and community identity, educational, spiritual, ideological, cultural and historic imperatives. The slight improvement in relationships with adjacent communities is to be welcomed and serves as a stepping stone for future improvement.

7.1.3   Overall recommendations

The tourism and recreational values of the KNP should be given special recognition in the Park's main Management Plan (Masterplan) as suggested in the framework in Chapter 6. A structured programme of tourism research and knowledge management should be used in continually updating the knowledge base of the Park's conservation and tourism values. This will require a multi-disciplinary leadership (consisting of trained strategic managers, financial experts, tourism practitioners, marketing professionals, public relations practitioners and social scientists in addition to ecologists and rangers).

The Park should be managed conservatively and sustainably to ensure that its values are not degraded and that the pressures that might contribute to the degradation of values are identified and managed through an integrated management plan before degradation occurs. Adaptive management, as suggested in the framework, is needed to provide a management philosophy to ensure that management strategies can be changed if they prove to be ineffective in protecting the system or improving results.

New approaches to tourism and recreation management now include sustainable use management, limits of use management, environmental performance management and business, community and authority accountability for environmental performance outcomes. The framework provided in Chapter 6 addresses these imperatives. The specific findings and recommendations of the objectives stated in each chapter of the study are presented in Table 7.1.

TABLE 7.1:   Specific findings and recommendations on the research objectives

CHAPTER	OBJECTIVES	FINDINGS	RECOMMENDATIONS
Chapter 1	Construct the background to the research problem	Tourism in protected areas is not managed in an integrated and professional manner with existing park management framework. A conflict exists that creates a gulf between tourism and conservation objectives. In many parks no tourism management framework exist.	Protected areas must develop tourism management plans as part of their broad policy statements in order to manage tourism in an integrated, coordinated and professional manner to avoid degradation of the natural resource base and to meet tourist expectations.
Chapter 2	Define the type of tourism practiced in protected areas, draw comparative international benchmarks to be used in developing a theoretical management framework for the KNP	Lack of common understanding in defining the types of tourism practiced by the KNP. Lack of a management philosophy, monitoring and evaluation plans to guide the development of tourism management plans. Different management models exist for different countries and parks. Overall, tourism does not constitute a serious area of management. Protected area managers are not qualified or experienced in tourism management, finance and marketing.	Protected areas should adopt the principles of ecotourism and sustainable tourism as guidelines for their tourism products and service delivery. A Management framework should be based on a legal framework and the adaptive management philosophy to accommodate changing circumstances. The changing management paradigms from the classic to the modern era should be reflected in the management framework. Management frameworks should be practical with measurable outcomes. The IUCN evaluation framework could be adapted to suit local conditions.
Chapter 3	Derive lessons from the KNP's historical background of tourism development to influence proposed management framework	The KNP wildlife product is well developed and indicators (ROZ Plan) exist to manage the wilderness qualities of the product. However, tourism has evolved without business acumen, with non-involvement of adjacent communities, poor infrastructure maintenance, inability to raise sufficient revenue, ignorance to tourist needs and lack of marketing.	It is imperative to create a tourism and recreational value system that will balance business and environmental imperatives for the survival of the KNP. The proposed management framework should include aspects of community participation, environmental impact management, proper maintenance of facilities, marketing and efficient management of finances to achieve financial viability. There is a need to explore innovative business options to maximize tourism revenue e.g. commercialization.
Chapter 4	Measure the demographic profiles of tourists, consumer personal motivation, tourist satisfaction levels and tourists' views on commercialization	KNP tourists come from across the globe and are predominantly highly educated. The KNP's natural attraction is the main draw-card for tourists. Tourists manifest mixed feelings about the quality of the product and are generally divided on the effect of commercialization on the Park in general and accommodation in particular.	The KNP needs a tourism management system that will protect tourism and recreational values that attract tourists. Tourists come to the Park in the main for peace of mind, tranquility, self-esteem, relaxation, confidence in the KNP brand and unspoilt wildness. These values must be protected in the management framework. There are clear reasons to be concerned about the manner in which the commercialization programme is being implemented. Further research and comprehensive planning need to take place before the programme can be expanded.

… continues

TABLE 7.1:   Specific findings and recommendations on the research objectives (continued)

CHAPTER	OBJECTIVES	FINDINGS	RECOMMENDATIONS
Chapter 5	Determine levels of community awareness attitudes and perceptions about the KNP and nature conservation	Contrary to earlier findings by Els (1994), communities are positive about nature conservation and the value of wild animals. They are concerned though that there are no mechanisms that channel benefits to them directly.	Although the social dimensions of Park management have been determined on the utilitarian spheres of tourism, recreation and public education, little is known about the spiritual, ideological and community identity elements of the Park experience. It is important to know how people perceive or value the Park experience or what that experience really means to them.
Chapter 6	Suggest an integrated tourism management framework which identifies tourism and recreational values	A framework is presented with a mission statement, management aspects, standards, indicators for assessing service quality and impacts.	The framework constitutes a template that will guide the development of an integrated tourism management plan with clear implementation phases or stages and time frames.
Additional finding	Ecotourism and sustainable tourism principles	In general the KNP products lack emphasis on ecotourism and sustainable use principles	The new framework should put emphasis on Community-based Natural Resource Management activities along the lines of Zimbabwe's CAMPFIRE programme or UNESCO's Biosphere reserves (2.5.9 and 2.5.9.1). Biosphere reserves are areas of protected ecosystems where solutions to reconcile the conservation of biodiversity with its sustainable use are promoted.
Additional finding	Utilization of State subsidy grant	Currently the government partly subsidizes SANParks to the tune of 18 % of its total operational budget. Plans are in the pipeline to eventually cut this subsidy grant and make SANParks financially independent from Treasury.	The whole world over there is no conservation agency that is not supported financially by the state. The conservation of a nation's natural and cultural heritage is a primary function of the government of the day. Given the enormity of the facilities' backlog in the KNP, SANParks alone will never succeed to address the shortfall. Revenue raised from tourism should rather be used to meet operating costs such as salaries, refurbishment of tourism facilities, interior décor, production of information brochures, marketing, meeting linen and cutlery and other operational needs. The state subsidy should cover both capital and maintenance of land acquisition for Park expansion, physical buildings, roads infrastructure and purchasing aircrafts. The grant should be inflation-linked and increased proportionally annually. It is unrealistic to expect SANParks to cover these costs from a system that is partly profitable because some parks have no tourism value at present.
Additional finding	Demands motivated by commercial pressure to expand tourism facilities	Uncontrollable expansion of the Park's facilities as a result of tourism demand affects the Park's values.	Management of all development needs to give priority to conservation of the core values of the Park, on which sustainable tourism and high quality tourist experience depends. A monitoring and evaluation plan with assessed indicators is suggested.

7.2 SHORTCOMINGS OF THE STUDY

7.2.1 Sample sizes

Although the sample size of the main survey was reasonably big, *N=836*, the sizes of the other three surveys were relatively small (*N=317, N=60 and N=130*) due to time and logistic constraints. The minimum sample size for a credible study differs from discipline to discipline and from one research topic to another. Most opinion surveys cannot get away with less than 1000 respondents, and most sociological and epidemiological studies require many hundreds of subjects. However, in some social research studies sample sizes of 30 to 100 subjects are a common occurrence. In some disciplines, where there is little variance in measurements, even single subject research may be found. The advantage of a large sample, on the other hand, is that the effect of missing data, as explained (see 4.1.3.4), does not influence the findings in a significant way.

It may be advisable to expand the sample sizes on the effect of commercialization on the Park's experience, community attitudes, value-laddering interviews and tourist satisfaction levels in a post-study research exercise as part of the continuous research endeavour to establish a social research base line for decision-making and strengthening of management effectiveness.

7.2.2 Knowledge gaps in social science research

Throughout this research study it has been necessary to emphasize the extent of inadequate social research information upon which the social dimension of planning and management could be better grounded. Whilst there are literally thousands of papers of pre-eminent quality in the natural science discipline in the KNP, only a handful were published in the social sciences (not commissioned by the Park), and most of them are of very superficial quality. There is no basic comparability over time and any comments on trends can only be impressional and based on professional judgement rather than hard scientific data.

7.2.3 Time constraints

The duration of this research study prevented the researcher from covering trends associated with the development process of the tourism management plan over time. In terms of the projected process the envisaged management plan will only be completed in March 2005 to allow the public participation process as prescribed by new legislation (see implementation plan 6.13).

7.2.4   Broad scope of tourism management

It was not humanly possible to cover the wide range of aspects associated with tourism management in a protected area in a single study. The fact that there were no scientific tourism studies conducted by the KNP research section prior to this one made it impossible to draw parallels from previous relevant research experience. Some aspects of this thesis, such as community participation in tourism activities, transfrontier parks, marketing, social research, the role of tour operators and the economic value of tourism, are only superficially covered in this study and would each constitute a distinct study in their own right. Tourism is a broad and complex field, composed of a number of sectors (see 2.9).

7.2.5   Combination of social and natural science methodology

The triangulation of natural and social science methodologies, although a widely acceptable approach in academic research, is very difficult to harmonize and to produce a coherent set of results. It requires advanced research skills, time and extraordinary abilities to refine the technique in order to arrive at compatible results each time the approach is applied. However, the researcher made an attempt that can be refined in further studies.

7.2.6   Tourism and recreational values

The fourteen (14) tourism and recreational values identified in this study (see 6.6.2.2) are by no means comprehensive. This is what the study could unravel within the time and scope constraints associated with this study. Further research could produce more tourism and recreational values that might add enormous value to the successful management of tourism in the KNP.

7.2.7   Tourist awareness and satisfaction

It is imperative to conduct regular surveys to determine values that underpin visitation. It was not possible to conduct repeated surveys to establish trends in this regard. Important aspects or variables include rating tourist satisfaction levels on availability and cleanliness of toilet facilities, walking trails, picnic spots, car parking, scenic driving, tourist information centres, information display boards, direction and information signs, availability of water and understaffing.

7.3   AREAS FOR FUTURE RESEARCH

The purpose of this study was to create an overview that could be used as a template with minor adjustments by protected areas, including the KNP, to develop integrated tourism management plans. Future research could possibly cover the following areas:

- tourist-use profiles for the different forms of access to and within the KNP; cost-benefit analysis of investments in the provision and maintenance of access for tourism and recreation and the environmental effects of the provision of access;

- the strategic environmental, social and economic impact of the commercialization programme;

- seasonal variations of tourism in the KNP;

- evaluation of the tourism impact on fauna, flora, geomorphology, water quality, wilderness and natural aesthetics and how it impacts on the natural attraction of the Park;

- aspects of the cultural history of the park including details of local people, history and nature and how these dynamics have influenced the cultural heritage of the Park (as part of cultural tourism);

- collaboration with the communities and the tourism industry in the management of tourism and recreational values at Park and regional level;

- implementation plans for sustainable tourism and recreation, including supply and demand management in the context of global and local criteria;

- market research into opportunities for educational use and the types of education experiences that currently attract tourists;

- modelling a fresh approach to the concept of carrying capacity along the lines suggested in 2.6.2;

- tourist feedback on existing services and facilities and unmet needs; supply and demand management; trends in tourists' expectations and experiences of services and facilities and movements in the region and the Park;

- financial modelling on the actual cost of providing services and facilities for tourism and recreation opportunities and possible funding sources;

- an integrated approach to managing tourism and recreation opportunities and activities across the region and how the KNP contributes to efforts by provincial tourism and conservation agencies, local government and the private sector; and

- determination of the socio-economic impacts of the Park's tourism on the local community, surrounding areas and the regional economy.

7.4   CONCLUSION

This study revealed that the KNP is a destination of significant importance in an international setting for biodiversity uniqueness and for international tourism. The Park is also a major scientific and tourist attraction on the domestic front. Although there are no reliable statistics available because of manual collection mechanisms, some significant correlation exists between the KNP's tourism foreign exchange earnings and the general health of the economy. The KNP is the second most visited destination in South Africa after Cape Town and therefore it is difficult to imagine any level of international destination marketing that would ignore the significance of this national icon. It makes perfect sense that tourism in the Park should be managed in the most professional and efficient manner to meet both the domestic and the international market's expectations. The condition of the Park as a tourism destination in terms of its quality of accommodation, staff, transport, accessibility, restaurants, shopping and recreation should reflect high standards for the Park to be rated higher than other destinations the world over. Failure to keep pace with reasonable and appropriate customer demands or changes in the external tourism environment may result in the KNP becoming unattractive and taking a debilitating blow from competition.

There is clearly some tension between the conservation and the tourism-use objectives of the Park, and decisions on biodiversity conservation would always have implications for tourism use. Whatever the nature and magnitude of the problem, the solution lies in a professional and scientific management approach to tourism through an integrated tourism management plan. The integrated tourism management framework suggested in this study can go a long way in helping to generate sufficient revenue, balance conservation with tourism and community needs and apply the required synergies among the various management objectives in protected area management.

It will be in the interest of present and future generations if tourism in the KNP were to be undertaken sensitively and in keeping with ecologically sustainable development and ecotourism principles to enhance the conservation status of the Park. The integrated tourism management framework suggested in this study will contribute directly to the KNP Management Plan (Master Plan) that translates the statutory basis for the management of the Park. With such an integrated tourism management framework the KNP will be able to assess the marginal costs of operating nature tourism and recreation and enhance revenue return.

Revenue will then be invested back into the maintenance of tourism facilities to achieve management effectiveness and tourist experience. This is a critical part of the ecologically sustainable tourist-use planning framework being introduced by SANParks through its commercialization programme.

On the question of community involvement the future of the KNP is bleak if it does not take advantage of the positive atmosphere that now prevails on its borders. The government of the day is sympathetic to institutions that join hands in the total transformation of the country. The KNP must play an even more visible role in reducing the frontiers of poverty by ensuring broadening of its ecosystem benefits and services to communities. Community based conservation programmes can go a long way in ensuring that communities living on its door-step are actively involved in conservation and ecotourism projects.

The study recognizes that a balance is possible between management for long-term conservation of the KNP and tourism demand, but there are limits to use, which must be identified by detailed planning and be managed. Such planning will upgrade the level of tourism opportunities for the public's enjoyment, community involvement and will directly have an influence on the improvement of the socio-economic conditions of adjacent communities in fulfilling SANParks' mission of making national parks the "pride and joy of all South Africans".

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ANNEXURE 1
IUCN CLASSIFICATION OF PROTECTED AREAS

CATE-GORIES	THE MODIFIED SYSTEM OF PROTECTED AREAS CATEGORIES AGREED AT THE IV WORLD CONGRESS ON NATIONAL PARKS AND PROTECTED AREAS
Ia	**Strict nature reserve/wilderness protection area:** managed mainly for science or wilderness protection – an area of land/or sea possessing some outstanding or representative ecosystems, geological or physiological features and/or species, available primarily for scientific research and/or environmental monitoring.
I	**Wilderness area:** protected area managed mainly for wilderness protection- large area of unmodified or slightly modified land and/or sea, retaining its natural characteristics and influence, without permanent or significant habitation, which is protected and managed to preserve its natural condition.
II	**National Park**: protected area managed mainly for ecosystem conservation and recreation. Natural areas of land and/or sea, designated (a) protect the ecological integrity of one or more ecosystems for this and future generations, (b) exclude exploitation or occupation inimical to the purposes of designation of the area and (c) provide a foundation for spiritual, scientific, educational, recreational and visitor opportunities, all of which must be environmentally and culturally compatible.
III	**Natural Monument**: protected areas managed mainly for conservation of specific features. Areas containing one, or more, specific natural/cultural feature which is of outstanding or unique value because of its inherent rarity, representative or aesthetic qualities or cultural significance.
IV	**Habitat/Species Management Area**: protected areas managed mainly for conservation through management intervention. Areas of land and/or sea subject to active intervention for management purposes so as to ensure the maintenance of habitats and/or to meet the requirements of specific species.
V	**Protected Landscape/Seascape**: protected areas managed mainly for conservation through management intervention. Areas of land, with coast and sea appropriate, where the interaction of people and nature over time has produced an area of distinct character with significant aesthetic, cultural and/or ecological value, and often with high biological diversity. Safeguarding the integrity of this traditional interaction is vital to the protection, maintenance and evolution of such an area.
VI	**Managed Resource Protected Area**: protected areas managed mainly for the sustainable use of natural ecosystems. Areas containing predominantly unmodified natural systems, managed to ensure long term protection and maintenance of biological diversity, while providing at the same time a sustainable flow of natural products and services to meet community needs.

ANNEXURE 2
SANPARKS TOURISM PERFORMANCE 2002/03

PARK	ACCOMMODATION (EXCL CAMPING)						CAMPER NIGHTS SOLD	% OF TOTAL	GUESTS TO PARK	% OF TOTAL	GAME DRIVE SEATS SOLD	% OF TOTAL	DAY WALKS (PERSONS) SOLD	% OF TOTAL	PERSONS ON WILDERNESS TRAILS
	UNIT NIGHTS SOLD	% OF TOTAL	UNIT OCCUPANCY	BED NIGHTS SOLD	% OF TOTAL	BED OCCUPANCY									
ADDO	14247	3,1	92,2 %	35028	3,0	52,9 %	12179	2,7	122123	4,0					
AUGRABIES	11056	2,4	51,5 %	25376	2,2	30,8 %	13637	3,0	69535	2,3	914	0,6	282	1,3	460
BONTEBOK	472	0,1	43,2 %	1352	0,1	20,6 %	4528	1,0	15638	0,5					
CAPE PENINSULA									1289161	42,6					
GOLDEN GATE	3361	0,7	68,0 %	11235	1,0	42,6 %	13709	3,1	24287	0,8			130	0,6	
KAROO	8127	1,8	80,1 %	21024	1,8	53,5 %	10434	2,3	33595	1,1	1870	1,3			
KGALAGADI	17858	3,8	67,0 %	45881	4,0	52,8 %	38422	8,6	76601	2,5	6957	4,7	656	3,0	4
KRUGER	364214	78,5	74,8 %	888366	77,0	59,9 %	272535	60,9	1059122	35,0	137704	92,8	20735	94,8	4709
MARAKELE	2146	0,5	55,2 %	5769	0,5	30,2 %	2184	0,5	11895	0,4					
MOUNTAIN ZEBRA	4641	1,0	64,4 %	11881	1,0	40,1 %	3808	0,9	16351	0,5	488	0,3	75	0,3	
RICHTERSVELD	87	0,0	23,8 %	472	0,0	12,9 %	12892	2,9	4489	0,1					
TSITSIKAMMA	24580	5,3	76,9 %	73838	6,4	60,6 %	43562	9,7	203678	6,7					3787
VAALBOS	304	0,1	35,1 %	1027	0,1	22,9 %	490	0,1	1818	0,1	432	0,3			
VHEMBI-DONGOLA	183	0,0	22,0 %	303	0,0	18,2 %			538	0,0					
WEST COAST	557	0,1	38,9 %	2195	0,2	25,1 %			71259	2,4					
WILDERNESS	12311	2,7	50,0 %	29763	2,6	31,3 %	19226	4,3	24952	0,8					
SANPARKS TOTAL	464144	100,0	72,8 %	1153510	100,0	55,6 %	447606	100,0	3025042	100,0	148365	100,0	21878	100,0	8960

ANNEXURE 3
SANPARKS WILD CARD INFORMATION FLYER

What makes the card so WILD?

The WILD card is a world-class smart card loyalty programme that makes tourism to National Parks in Southern Africa more accessible, easier, safer and Infinitely more rewarding than ever before. It is a joint initiative by South African National Parks (SANParks) and INFINITY – South Africa's leading loyalty and smart card management company.

The WILD card is smart* and uniquely designed to provide travellers, like yourself, with added value when visiting any National Park. WILD card membership is valid for 1 year for South African residents, 6 months for SADC nationals and offers FREE unlimited entry (subject to visitor capacity) to all parks. Due to high demand during busy periods, parks close to guests unless they have accommodation or day visits reserved in advance.

Enjoy the numerous WILD benefits plus earn CashBack Rewards (real money) from thousands of Infinity partners countrywide on travel, adventures, accommodation, airlines, car hire, tours, leisure, dining, movies, entertainment, attractions, shopping and much more. Spend more earn more! CashBack Rewards are paid in cash, credited directly to your card - you don't have to wait for months to spend your CashBack Rewards – they are available immediately to be redeemed at any partner you choose. CashBack Rewards are also available within the parks.

What is a smart* card?

Smart cards are the latest innovation in card technology. A small computer chip is embedded in the card and activated as the card is inserted into a credit card terminal. It both stores and processes information, so your card becomes a PIN protected and secure purse! Access into the parks is controlled by the rules embedded in your smart WILD card.

What are CashBack Rewards?

CashBack is exactly what it says – real money that is automatically loaded into the chip's purse of your WILD card, whenever and wherever you use it at participating Infinity partners countrywide. Because your card is smart - you can choose to spend your CashBack Rewards immediately after earning it, or save it to buy something special, at any of the partners. Remember, your card now works at over 2 000 Infinity partners.

The WILD Card gives you endless benefits:

- You do not have to pay anytime you enter your favourite National park – your WILD membership gives you FREE and unlimited access.

- The membership fee is not only aimed at Individuals, but accommodates the needs of Couples and Families.

- WILD members get a FREE up-to-date WILD guide, which provides information on where to earn CashBack Rewards, what to do, where to go, how to find your way around the parks and much more.

PLUS . . .

- Endless rewards - keep enjoying the benefits for as long as you remain an active WILD member.

- Entertainment rewards – huge CashBack Rewards of up to 40% to South Africa's most popular tourist attractions.

- Travel rewards - make your travel reservations through Infinity and earn CashBack Rewards up to 20% on holiday packages and accommodation.

- Car rental rewards - get preferential rates and 7% CashBack.

- Airline rewards - get preferential rates and 3% CashBack.

- Accommodation rewards - up to 20% CashBack at hundreds of places.

- Gardening rewards - get 5% CashBack at popular nurseries.

- Refreshment rewards - get 5% CashBack Rewards at many of South Africa's restaurants, including any Mugg & Bean countrywide.

- Shopping rewards – present your card at any of the growing number of Infinity partners countrywide and earn endless CashBack Rewards.

- Instant rewards – you do not have to wait for months to use your rewards, they are available immediately.

- Competition rewards – you enjoy automatic FREE entry into Infinity's monthly draw to win cash, holiday and leisure prizes worth more than R50,000.00. Simply use your card at least 5 times a month at our partners and you are guaranteed a prize.

- Movie rewards – get 25% CashBack Rewards on your first ticket from any Nu Metro or IMAX theatre countrywide, plus 5% on all subsequent tickets, as well as 5% CashBack at the refreshment counters.

Special offers – you will receive endless, on-going WILD offers via SMS and e-mail.

ANNEXURE 4
ROZ PLAN ZONES AND ALLOWED ACTIVITIES

Zone	Definition	Possible Activities
PROCLAIMED WILDERNESS AREAS (ONLY GUIDED, NON-MOTORIZED ENTRANCE PERMITTED)		
A Pristine Hiking Wilderness	* Unmodified natural environment * The purest form of wilderness possible * No evidence of modern man having manipulated the ecosystem in any way, past or present * No sight as far as the eye can see, or sound of modern man (except for passing aircraft but with high probability of no overfly) - own noise only * No roads or other infrastructure in or peripheral to the area	* Backpacking/hiking/walking for one group at a time * Possibly allow small boats down river as well as horse/ camel/ elephant trails
B Primitive Hiking Wilderness	* Essentially unmodified natural environment * No evidence of modern man having manipulated the ecosystem in recent past * Views of outside development or Park infrastructure may be visible in the distance from certain vantage points. Sounds of vehicles/trains may sometimes be audible in the distance * No roads or other infrastructure in the area. The area is buffered from roads by next zone * Potential for rehabilitation to Zone A	* As above BUT may allow small numbers of groups into area at the same time * May allow sleeping in portable tent or in open on edge of zone applying no-trace camping ethic
GENERAL VISITOR AREAS (GUIDED OR UNGUIDED MOTORIZED ENTRANCE PERMITTED)		
C Semi-primitive (Motorized) Wilderness	* Slightly modified natural environment * Limited evidence of modern man having manipulated the ecosystem * Views of outside development or Park infrastructure possible but infrequent * Roads (mainly ungravelled) or other infrastructure present but limited to the minimum required for management and tourism activities	* Guided or unguided 4x4 tent safaris or trails * Guided hikes, walks, bird courses, tree courses, environmental education courses and courses in general bushcraft * Game viewing by 4x4 or other suitable vehicles on rustic tracks and small roads * Unaccompanied alighting from vehicles at certain points * Primitive and low-cost camping with own tent, or in small tented or rustic camps
D Limited Access Motorized Areas	* Slightly to moderately modified natural environment * Limited evidence of modern man having manipulated the ecosystem * Views of outside development or Park infrastructure possible but infrequent * Gravelled roads or other infrastructure present but limited to the minimum required for management and tourism activities	* Motorized guided and unguided game viewing on gravel roads, including open vehicles * Guided motorized day and night drives with open vehicles from low density high-income luxury camps * Short guided day walks

ANNEXURE 4: ROZ PLAN ZONES AND ALLOWED ACTIVITIES *(continued)*

Zone	Definition	Possible Activities
E Motorized Areas	* Traditional game viewing routes with associated road infrastructure, picnic sites, viewpoints, bridges, self-guided trails, etc. * Occur as corridors in zones described above * Moderately strongly modified natural environment * Evidence of modern man having manipulated the ecosystem	* General game viewing by sedan cars, buses and approved open vehicles * Alighting from vehicles not allowed except at designated areas (lookout points, hides, large bridges, etc.) * Guided motorized day and night drives from rest camps
F High-density Development Areas	* Highly modified natural environment (restcamps, staff villages, administration buildings, rangers posts, etc.) developed for visitors and administration * Modern amenities very much in evidence * Facilities to buy goods such as food, petrol, curios, etc. are available * Many other non-game reserve dependant facilities such as swimming pools are provided	* All activities associated with staying in a restcamp, e.g. shopping, film shows, etc. * Contact with surrounding natural areas provided through paths along camp fence, hides, etc.
G Edutainment Centres	* Highly modified areas combining entertainment, environmental education and upliftment of local communities. * Can be ultra noisy * Designed in such a way that it serves local communities and attracts tourists	* Activities associated with cultural entertainment centres e.g. picnicking, dancing, singing, cooking, etc. * Selling of arts and crafts to tourists * Hosting of community events

ANNEXURE 5
CAMPS: HISTORIC OVERVIEW AND MAINTENANCE REQUIREMENTS

REST CAMP	YEAR OPENED	DESCRIPTION OF FACILITIES	ASSESSMENT OF CONDITION	DEVELOPMENT POTENTIAL	MAINTENANCE REQUIREMENTS
Balule	1930	6 huts & 15 camp sites	Ablution run down. Old historic camp	Huts need upgrading for possible lodge development	R250K
Bateleur	1988	7 family cottages	Fairly good condition	Additional services could do	R300K
Berg-en-Dal	1984	70 camp sites, 69 bungalows, 23 family cottages, 2 guest houses	After 20 years facilities are aging	Needs to be converted to world class conference destination	R 5 million
Biyamiti	1991	15 family cottages	Fairly good condition	Additional conveniences such as a kitchen and lapa	R300K
Boulders	1985	1 x 4 bedroomed bush lodge	Facility is run down. Serious bat nesting problems	Can be upgraded into a luxury lodge	R1,5 million
Crocodile Bridge	1930	12 camp sites, 8 budget tents & 23 bungalows	Good condition	Normal maintenance required	R500K
Letaba	1930	55 camps sites, 20 budget tents, 86 bungalows, 10 family cottages & 2 guest houses	Accommodation in reasonable condition but needs maintenance. Market segmentation necessary	Product can be diversified to cater for more segments. Riverview huts need upgrading to luxury levels	R3 million
Lower Sabie	1936	34 camp sites, 30 huts, 64 bungalows, 2 family cottages, 24 semi-luxury tents & 1 guest house	Bulk of accommodation units were built in the 1960s and need total revamp	Six new luxury tents are required	R10 million
Malelane	1930	15 camp sites and 5 bungalows	Very old buildings which need renovation	Close proximity to urban centre and suitable for a lodge	R300K
Marula	1967	20 camps sites	Needs landscaping & levelling	Has potential for more camping sites	R750K
Mopani	1991	57 bungalows, 45 family cottages, 1 guest house	Camp is relatively new but needs interior décor	Has potential to become a conference destination because of its 500 beds per night capacity	R3,5 million
Olifants	1960	111 bungalows & 2 guest houses	Facilities are over 40 years old and camp needs facelift	Riverview units should be upgraded into luxury units	R6 million
Orpen	1954	12 huts & 5 family cottages	Huts are old and need serious upgrading	Entrance gate shop needs attention, need for restaurant	R1,2 m (excluding new restaurant)

REST CAMP	YEAR OPENED	DESCRIPTION OF FACILITIES	ASSESSMENT OF CONDITION	DEVELOPMENT POTENTIAL	MAINTENANCE REQUIREMENTS
Pretoriuskop	1928	40 camp sites, 77 huts, 54 bungalows, 4 family cottages & 2 guest houses	Units are aged and need extensive upgrading	Market segmentation	R5 million
Punda Maria	1932	23 bungalows & 50 camp sites	Needs interior décor. Camp sites need landscaping & ablution blocks renewed	Historical character of the hartebees type huts need to be retained.	R2,5 million
Roodewal	1990	1 x 5 bedroom bush lodge	Reasonable condition	Can be turned into a luxury lodge	R250K
Satara	1928	74 camp sites; 151 bungalows, 10 family cottages; 3 guests houses	Virtually all accommodation need maintenance & upgrading to meet market segments	Upgrades should be based on a marketing plan with specific market segment targets	R7,5 million
Shimuwini	1991	15 family cottages	Facilities in good condition	Need for a kitchen and lapa	R300K
Shingwedzi	1934	50 camp sites, 24 huts, 54 bungalows, 1 family cottage & 1 guest house	Historic hartebees type bungalows must be maintained, Interior décor needs serious attention	Water problems restrain further development. Fly camps should be considered. Interior decorations are urgently needed	R2 million
Sirheni	1991	15 family cottages	Fairly good condition	Lapa and a kitchen could add value	R300K
Skukuza	1928	1 dormitory for 72 school children, 80 camp sites, 31 budget tents, 179 bungalows, 16 family cottages, 20 river view semi-luxury huts & 4 guest houses	Upgrades are necessary in 70 % of the units. Campsites need proper landscaping. Tents and ablution blocks need to be replaced	Accommodation product must be properly segmented to meet guest profiles.	R15 million
Talamati	1991	15 family cottages	Fairly good facilities	Need a small kitchen & a lapa	R300K
Tamboti	1995	30 budget & 10 semi-luxury tents	Satisfactory	Additional services e.g. a lapa and small kitchen could do	R300K
TOTAL		**4 273 beds + 3 090 camp sites = 7 363**			R66 050 000

ANNEXURE 6
KRUGER NATIONAL PARK QUESTIONNAIRE:
TOURIST SURVEY

Why this questionnaire?   Certain changes are being implemented in the KNP in order to streamline its functions and improve its services. A research project has been registered to obtain information about what various stakeholders think about some of these changes. This information should be useful to management in their decision making.

What we would like you to do? The questionnaire consists of statements to which you have to indicate how much you agree or disagree on a 5-point scale. You should be able to complete the questionnaire in approximately **15** minutes. Although some personal information is required for research purposes, no names are asked. The questionnaire is therefore completed anonymously. **Only the researchers will see the individual questionnaires.** Please complete ALL the questions.

Which camp? Please indicate below for which camp you are completing the questionnaire.

Camp: …………………………………………..

Note that if there are sections that you cannot report on for this particular camp, you may report on another camp for a particular section. Please indicate the name of the camp in the appropriate space at the top of that section.

Thank you for your cooperation and willingness to participate in this survey!!

GENERAL INFORMATION

Please complete the following. Indicate what applies to you with a cross (X).

Today's date:

y	y	y	y	m	m	d	d

Which category applies to your present visit?

Day visitor	Camping	Hut Hut number: ………..	Private Camp

How many nights are you staying at this camp? ....

How many nights are you staying in the KNP during this visit?...

How many people are in your party?..

How many times have you visited the KNP? (Including the present visit)

1	2	3	4	5	6	7	8	9	10	More than 10 times

Your age in years:

-19	20-29	30-39	40-54	55-64	65+

Gender:

Female	**Male**

I am a

South African citizen	South African resident	Foreign visitor

Country of origin: ....
Home language: ....
Marital status:

Married/Living with a partner	Single	Divorced/Widowed

What is your highest educational qualification?

0-11 years education	12 years (high school completed)	Tertiary: 1-3 years (diploma or first degree)	Tertiary: 4+ years (higher degree)

For all further questions, please indicate the extent to which you agree or disagree with the statements below by making a cross in the appropriate block. Please respond to all the statements. Fill in the camp name at the top of each section if you are not reporting on the same camp given on the front page.

GENERAL COMMENTS

2. The KNP should retain its identity by means of its emblem, decorations and staff uniforms
Strongly disagree | ☹ | ☺ | ☺ | ☺ | ☺ | Strongly agree

3. The gardens are neat and well tended
Strongly disagree | ☹ | ☺ | ☺ | ☺ | ☺ | Strongly agree

4. The gate services are efficient
Strongly disagree | ☹ | ☺ | ☺ | ☺ | ☺ | Strongly agree

5. Information services in the camp meet with my expectations
Strongly disagree | ☹ | ☺ | ☺ | ☺ | ☺ | Strongly agree

6. Information services are accessible
Strongly disagree | ☹ | ☺ | ☺ | ☺ | ☺ | Strongly agree

7. It is easy to find one's way inside the camp
Strongly disagree | ☹ | ☺ | ☺ | ☺ | ☺ | Strongly agree

8. Laundry services are adequate
Strongly disagree | ☹ | ☺ | ☺ | ☺ | ☺ | Strongly agree

9. Exhibitions are interesting and informative
Strongly disagree | ☹ | ☺ | ☺ | ☺ | ☺ | Strongly agree

10. Tourists are well-behaved in the park
Strongly disagree | ☹ | ☺ | ☺ | ☺ | ☺ | Strongly agree

11. Day drives are a sought-after KNP activity
Strongly disagree | ☹ | ☺ | ☺ | ☺ | ☺ | Strongly agree

12. Picnic spots and other stopover points are well maintained
Strongly disagree | ☹ | ☺ | ☺ | ☺ | ☺ | Strongly agree

13. Visitors can easily locate the animals
Strongly disagree | ☹ | ☺ | ☺ | ☺ | ☺ | Strongly agree

14. Commercialization has a positive effect from the tourists' point of view
Strongly disagree | ☹ | ☺ | ☺ | ☺ | ☺ | Strongly agree

15. Night drives offer an exclusive bush experience
Strongly disagree | ☹ | ☺ | ☺ | ☺ | ☺ | Strongly agree

16. Night drives offer good value for money
Strongly disagree | ☹ | ☺ | ☺ | ☺ | ☺ | Strongly agree

17. Tourists keep to the rules of the park
Strongly disagree | ☹ | ☺ | ☺ | ☺ | ☺ | Strongly agree

18. There are too many official vehicles on the roads
Strongly disagree | ☹ | ☺ | ☺ | ☺ | ☺ | Strongly agree

19. Nature conservation appears to be well taken care of
Strongly disagree | ☹ | ☺ | ☺ | ☺ | ☺ | Strongly agree

20. The roads surrounding the camp are well maintained
Strongly disagree | ☹ | ☺ | ☺ | ☺ | ☺ | Strongly agree

21. Visible commercialization is destroying the 'Kruger experience'
    Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

22. Drinking points offer a good opportunity for game viewing
    Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

23. Picnic sites provide adequate facilities
    Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

24. The KNP is too crowded with people
    Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

25. Films and other information (i.e. exhibitions) meet with my expectations
    Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

26. The Kruger experience is spoiled by noise in the camp
    Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

27. The services provided by the camp are easily accessible
    Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

28. Entertainment for tourists, such as film shows or swimming pools are spoiling the 'Kruger experience'
    Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

Anything else you want to share with us or point out to us?

....

....

....

CAFETERIA

Camp for which you are completing this section: _____
                                                    [camp name if not the same as front page]

29. The atmosphere of the cafeteria is pleasant
    Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

30. Food is well prepared
    Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

31. The variety of dishes offered is adequate
    Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

32. The food is attractively presented
    Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

33. The service in the cafeteria is up to standard
    Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

34. The food appears wholesome and healthy
    Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

… continues

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35. The cafeteria offers good value for money
Strongly disagree   ☹   ☹   ☺   ☹   ☹   Strongly agree

36. The décor inside the cafeteria is attractive
Strongly disagree   ☹   ☹   ☺   ☹   ☹   Strongly agree

37. The staff in the cafeteria is friendly and helpful
Strongly disagree   ☹   ☹   ☺   ☹   ☹   Strongly agree

38. The type of food offered by the cafeteria meets with my expectations
Strongly disagree   ☹   ☹   ☺   ☹   ☹   Strongly agree

39. A sufficient variety of health foods are available to choose from
Strongly disagree   ☹   ☹   ☺   ☹   ☹   Strongly agree

40. The cafeteria atmosphere fits and enhances the 'Kruger bush experience'
Strongly disagree   ☹   ☹   ☺   ☹   ☹   Strongly agree

41. The prices of meals are reasonable
Strongly disagree   ☹   ☹   ☺   ☹   ☹   Strongly agree

42. The menu caters for special diets
Strongly disagree   ☹   ☹   ☺   ☹   ☹   Strongly agree

43. The business hours of the cafeteria suit my needs
Strongly disagree   ☹   ☹   ☺   ☹   ☹   Strongly agree

44. The cafeteria is well positioned to allow tourists to experience nature
Strongly disagree   ☹   ☹   ☺   ☹   ☹   Strongly agree

45. The external appearance of the cafeteria is imaginative
Strongly disagree   ☹   ☹   ☹   ☹   Strongly agree

46. The décor inside the cafeteria is suitable
Strongly disagree   ☹   ☹   ☺   ☹   ☹   Strongly agree

47. The cafeteria is easily accessible
Strongly disagree   ☹   ☹   ☺   ☹   ☹   Strongly agree

48. Bar facilities at the cafeteria are adequate
Strongly disagree   ☹   ☹   ☺   ☹   ☹   Strongly agree

49. The cafeteria should stay open later at night
Strongly disagree   ☹   ☹   ☺   ☹   ☹   Strongly agree

Do you have specific comments regarding the cafeteria?

....

....

....

RESTAURANT
Camp for which you are completing this section: _____
[camp name if not the same as front page]

… continues

50. The atmosphere in the restaurant is pleasant
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

51. The food is well prepared
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

52. The variety of dishes offered is adequate
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

53. The food is presented attractively
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

54. The service in the restaurant is up to standard
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

55. The food appears wholesome and healthy
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

56. The restaurant offers good value for money
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

57. The décor inside the restaurant is attractive
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

58. The waiters in the restaurant are friendly and helpful
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

59. The type of food offered by the restaurant meets with my expectations
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

60. A sufficient variety of health foods are available to choose from
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

61. The restaurant atmosphere fits and enhances the 'Kruger bush experience'
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

62. Meals are reasonably priced
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

63. The menu caters for special diets
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

64. The business hours of the restaurant suit my needs
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

65. The restaurant is well positioned to allow tourists to experience nature
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

66. The external appearance of the restaurant is imaginative
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

67. The décor inside the restaurant is attractive
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

68. The restaurant is easily accessible
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

…continues

69. The bar facilities at the restaurant are adequate
    Strongly disagree [☹ | ☹ | ☺ | ☹ | ☹] Strongly agree

70. The restaurant should stay open later at night
    Strongly disagree [☹ | ☹ | ☺ | ☹ | ☹] Strongly agree

Do you have specific comments regarding the restaurant?

....

....

....

SHOP

Camp for which you are completing this section: _____
                                                   [camp name if not the same as front page]

71. The atmosphere of the shop is pleasant
    Strongly disagree [☹ | ☹ | ☺ | ☹ | ☹] Strongly agree

72. The shop stocks high quality groceries
    Strongly disagree [☹ | ☹ | ☺ | ☹ | ☹] Strongly agree

73. Souvenirs in the shop are of a high quality
    Strongly disagree [☹ | ☹ | ☺ | ☹ | ☹] Strongly agree

74. The shop offers a sufficient variety of items
    Strongly disagree [☹ | ☹ | ☺ | ☹ | ☹] Strongly agree

75. The shop stocks interesting products
    Strongly disagree [☹ | ☹ | ☺ | ☹ | ☹] Strongly agree

76. Most items sold in the shop are useful during a KNP visit
    Strongly disagree [☹ | ☹ | ☺ | ☹ | ☹] Strongly agree

77. The shop sells attractive curio items
    Strongly disagree [☹ | ☹ | ☺ | ☹ | ☹] Strongly agree

78. KNP shops should sell luxury items
    Strongly disagree [☹ | ☹ | ☺ | ☹ | ☹] Strongly agree

79. I can buy necessary items for my KNP visit in the shop
    Strongly disagree [☹ | ☹ | ☺ | ☹ | ☹] Strongly agree

80. The service in the shop is good
    Strongly disagree [☹ | ☹ | ☺ | ☹ | ☹] Strongly agree

81. The shop offers good value for money
    Strongly disagree [☹ | ☹ | ☺ | ☹ | ☹] Strongly agree

82. Perishable foods are mostly fresh
    Strongly disagree [☹ | ☹ | ☺ | ☹ | ☹] Strongly agree

83. The type of items offered by the shop meets with my expectations
    Strongly disagree [☹ | ☹ | ☺ | ☹ | ☹] Strongly agree

84. The range of goods offered in the shop meets with my expectation
    Strongly disagree [☹ | ☹ | ☺ | ☹ | ☹] Strongly agree

… continues

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85. The food sold in the shop is reasonably priced
Strongly disagree [☹ | ☹ | ☺ | ☺ | ☺] Strongly agree

86. I prefer to bring my self-catering ingredients with me
Strongly disagree [☹ | ☹ | ☺ | ☺ | ☺] Strongly agree

87. The business hours of the shop suit my needs
Strongly disagree [☹ | ☹ | ☺ | ☺ | ☺] Strongly agree

88. The shop is easily accessible
Strongly disagree [☹ | ☹ | ☺ | ☺ | ☺] Strongly agree

89. I buy only basic items such as milk, bread and firewood at the shop.
Strongly disagree [☹ | ☹ | ☺ | ☺ | ☺] Strongly agree

Do you have specific comments regarding the shop?

....

....

....

ACCOMMODATION

Camp for which you are completing this section: _____
[camp name if not the same as front page]

90. The atmosphere of the accommodation facilities is pleasant
Strongly disagree [☹ | ☹ | ☺ | ☺ | ☺] Strongly agree

91. The quality of the accommodation is high
Strongly disagree [☹ | ☹ | ☺ | ☺ | ☺] Strongly agree

92. The variety of accommodation offered is sufficient
Strongly disagree [☹ | ☹ | ☺ | ☺ | ☺] Strongly agree

93. The exteriors of the accommodation units are interesting
Strongly disagree [☹ | ☹ | ☺ | ☺ | ☺] Strongly agree

94. The interiors of the accommodation units are attractive
Strongly disagree [☹ | ☹ | ☺ | ☺ | ☺] Strongly agree

95. The accommodation units meet my needs regarding comfort
Strongly disagree [☹ | ☹ | ☺ | ☺ | ☺] Strongly agree

96. The bathroom facilities meet with my expectations
Strongly disagree [☹ | ☹ | ☺ | ☺ | ☺] Strongly agree

97. High standards of cleanliness are maintained
Strongly disagree [☹ | ☹ | ☺ | ☺ | ☺] Strongly agree

98. The service for accommodation is good
Strongly disagree [☹ | ☹ | ☺ | ☺ | ☺] Strongly agree

… continues

99. The accommodation offers good value for money
Strongly disagree | ☹ | ☹ | ☺ | ☺ | ☺ | Strongly agree

100. The type of accommodation offered meets with my expectations
Strongly disagree | ☹ | ☹ | ☺ | ☺ | ☺ | Strongly agree

101. The accommodation offers an exclusive bush experience
Strongly disagree | ☹ | ☹ | ☺ | ☺ | ☺ | Strongly agree

102. Check-in times for accommodation are convenient
Strongly disagree | ☹ | ☹ | ☺ | ☺ | ☺ | Strongly agree

103. Check- out times for accommodation are convenient
Strongly disagree | ☹ | ☹ | ☺ | ☺ | ☺ | Strongly agree

104. Decorations in the huts are tasteful
Strongly disagree | ☹ | ☹ | ☺ | ☺ | ☺ | Strongly agree

105. Accommodation neatness is up to standard
Strongly disagree | ☹ | ☹ | ☺ | ☺ | ☺ | Strongly agree

106. KNP accommodation rates compare favourably with similar accommodation elsewhere
Strongly disagree | ☹ | ☹ | ☺ | ☺ | ☺ | Strongly agree

107. The rates for the various kinds of accommodation are fair
Strongly disagree | ☹ | ☹ | ☺ | ☺ | ☺ | Strongly agree

108. The standard of facilities in the huts match the cost
Strongly disagree | ☹ | ☹ | ☺ | ☺ | ☺ | Strongly agree

109. The variety of affordable accommodation options is adequate
Strongly disagree | ☹ | ☹ | ☺ | ☺ | ☺ | Strongly agree

110. There should be more options for luxury accommodation in the park
Strongly disagree | ☹ | ☹ | ☺ | ☺ | ☺ | Strongly agree

Do you have specific comments regarding the accommodation?

....

....

....

RECEPTION

Camp for which you are completing this section: _____
[camp name if not the same as front page]

111. The reception area has a pleasant atmosphere
Strongly disagree | ☹ | ☹ | ☺ | ☺ | ☺ | Strongly agree

112. The reception office is attractive
Strongly disagree | ☹ | ☹ | ☺ | ☺ | ☺ | Strongly agree

113. Staff members at reception are competent

Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

114. Staff members at reception are helpful
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

115. Staff members at reception are friendly
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

116. The quality of service at reception is good
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

117. The information offered by reception staff is good
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

118. There is too much queuing at reception
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

119. Business hours of reception are adequate
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

120. Reception is easily accessible
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

121. Reception hours are convenient
Strongly disagree | ☹ | ☹ | ☺ | ☹ | ☹ | Strongly agree

Do you have specific comments regarding reception?

....

....

....

ANNEXURE 7
DISTRIBUTIONS OF RESPONSES TO THE 120 INDIVIDUAL ITEMS IN THE QUESTIONNAIRE

General: Responses to items

		Strongly disagree	2	3	4	Strongly agree	Total
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
Gardens are neat and well tended	Count	10	18	85	309	384	806
	%	1,2	2,2	10,5	38,3	47,6	100,0
The gate services are efficient	Count	15	21	68	287	409	800
	%	1,9	2,6	8,5	35,9	51,1	100,0
Information services in the camp meet with my expectations	Count	9	37	122	332	290	790
	%	1,1	4,7	15,4	42,0	36,7	100,0
Information services are accessible	Count	15	22	125	347	283	792
	%	1,9	2,8	15,8	43,8	35,7	100,0
It is easy to find one's way inside the camp	Count	7	19	71	282	427	806
	%	0,9	2,4	8,8	35,0	53,0	100,0
Laundry services are adequate	Count	9	25	157	211	185	587
	%	1,5	4,3	26,7	35,9	31,5	100,0
Exhibitions are interesting and informative	Count	6	24	165	291	236	722
	%	0,8	3,3	22,9	40,3	32,7	100,0
Tourists are well-behaved in the park	Count	36	56	157	342	211	802
	%	4,5	7,0	19,6	42,6	26,3	100,0
Day drives are a sought-after KNP activity	Count	30	54	192	203	224	703
	%	4,3	7,7	27,3	28,9	31,9	100,0
Picnic spots and other stopover points are well maintained	Count	12	22	84	288	378	784
	%	1,5	2,8	10,7	36,7	48,2	100,0
Visitors can easily locate animals	Count	19	55	201	322	188	785
	%	2,4	7,0	25,6	41,0	23,9	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
Night drives offer an exclusive bush experience	Count	19	28	107	226	340	720
	%	2,6	3,9	14,9	31,4	47,2	100,0
Night drives offer good value for money	Count	32	52	174	240	195	693
	%	4,6	7,5	25,1	34,6	28,1	100,0
Tourists keep to the rules of the park	Count	60	96	181	309	145	791
	%	7,6	12,1	22,9	39,1	18,3	100,0
There are too many official vehicles on the roads	Count	207	244	197	85	68	801
	%	25,8	30,5	24,6	10,6	8,5	100,0
Nature conservation appears to be well taken care of	Count	11	25	103	327	330	796
	%	1,4	3,1	12,9	41,1	41,5	100,0

…continues

		Strongly disagree	2	3	4	Strongly agree	Total
The roads surrounding the camp are well maintained	Count	13	19	52	318	402	804
	%	1,6	2,4	6,5	39,6	50,0	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
Drinking points offer a good opportunity for game viewing	Count	19	53	147	263	303	785
	%	2,4	6,8	18,7	33,5	38,6	100,0
Picnic sites provide adequate facilities	Count	8	17	120	303	319	767
	%	1,0	2,2	15,6	39,5	41,6	100,0
The KNP is too crowded with people	Count	149	288	204	106	51	798
	%	18,7	36,1	25,6	13,3	6,4	100,0
Films and other information (i.e. exhibitions) meet with my expectations	Count	27	61	216	227	133	664
	%	4,1	9,2	32,5	34,2	20,0	100,0
The Kruger experience is spoiled by noise in the camp	Count	249	252	115	90	85	791
	%	31,5	31,9	14,5	11,4	10,7	100,0
The services provided by the camp are easily accessible	Count	5	14	88	364	324	795
	%	0,6	1,8	11,1	45,8	40,8	100,0
Entertainment for tourists, such as film shows or swimming pools are spoiling the "Kruger experience"	Count	313	206	130	68	54	771
	%	40,6	26,7	16,9	8,8	7,0	100,0

Cafeteria: Camp for which you are completing this section:

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	**Olifants**	66	7,9	21,9	21.9
	Shingwedzi	7	0,8	2,3	24.2
	Letaba	18	2,2	6,0	30.1
	Punda Maria	3	0,4	1,0	31.1
	Mopani	5	0,6	1,7	32.8
	Satara	70	8,4	23,2	56,0
	Berg-en-Dal	25	3,0	8,3	64,2
	Skukuza	60	7,2	19,9	84,1
	Lower Sabie	32	3,8	10,6	94,7
	Pretoriuskop	9	1,1	3,0	97,7
	Biyamiti	5	0,6	1,7	99,3
	Tshokwane	1	0,1	0,3	99,7
	Day visitor	1	0,1	0,3	100,0
	Total	302	36,1	100,0	
Missing	**System**	534	63,9		
Total		836	100.0		

Cafeteria: Responses to items

		Strongly disagree	2	3	4	Strongly agree	Total
The atmosphere of the cafeteria is pleasant	Count	48	59	149	250	158	664
	%	7,2%	8,9%	22,4%	37,7%	23,8%	100,0%
Food is well prepared	Count	51	67	153	235	134	640
	%	8,0%	10,5%	23,9%	36,7%	20,9%	100,0%
The variety of dishes offered is adequate	Count	66	92	159	218	108	643
	%	10,3%	14,3%	24,7%	33,9%	16,8%	100,0%
The food is attractively presented	Count	49	83	178	226	105	641
	%	7,6%	12,9%	27,8%	35,3%	16,4%	100,0%
The service in the cafeteria is up to standard	Count	65	78	159	221	122	645
	%	10,1%	12,1%	24,7%	34,3%	18,9%	100,0%
Food appears wholesome and healthy	Count	56	85	177	227	97	642
	%	8,7%	13,2%	27,6%	35,4%	15,1%	100,0%
The cafeteria offers good value for money	Count	63	99	166	208	107	643
	%	9,8%	15,4%	25,8%	32,3%	16,6%	100,0%
The decor inside the cafeteria is attractive	Count	64	96	164	213	111	648
	%	9,9%	14,8%	25,3%	32,9%	17,1%	100,0%
The staff in the cafeteria is friendly and helpful	Count	33	52	108	270	191	654
	%	5,0%	8,0%	16,5%	41,3%	29,2%	100,0%
The type of food offered by the cafeteria meets with my expectations	Count	70	93	157	222	98	640
	%	10,9%	14,5%	24,5%	34,7%	15,3%	100,0%
Sufficient variety of health foods are available to choose from	Count	101	113	184	167	61	626
	%	16,1%	18,1%	29,4%	26,7%	9,7%	100,0%
The cafeteria atmosphere fits and enhances the "Kruger bush experience"	Count	91	103	165	184	99	642
	%	14,2%	16,0%	25,7%	28,7%	15,4%	100,0%
The prices of the meals are reasonable	Count	78	82	185	208	88	641
	%	12,2%	12,8%	28,9%	32,4%	13,7%	100,0%
The menu caters for special diets	Count	106	118	221	73	25	543
	%	19,5%	21,7%	40,7%	13,4%	4,6%	100,0%
The business hours of the cafeteria suit my needs	Count	35	53	105	261	174	628
	%	5,6%	8,4%	16,7%	41,6%	27,7%	100,0%
The cafeteria is well positioned to allow tourists to experience nature	Count	10	34	101	256	238	639
	%	1,6%	5,3%	15,8%	40,1%	37,2%	100,0%
The external appearance of the cafeteria is imaginative	Count	52	73	189	197	129	640
	%	8,1%	11,4%	29,5%	30,8%	20,2%	100,0%
The decor inside the cafeteria is suitable	Count	53	80	192	210	103	638
	%	8,3%	12,5%	30,1%	32,9%	16,1%	100,0%
The cafeteria is easily accessible	Count	5	7	79	317	236	644
	%	0,8%	1,1%	12,3%	49,2%	36,6%	100,0%
Bar facilities at the cafeteria are adequate	Count	34	37	145	241	131	588
	%	5,8%	6,3%	24,7%	41,0%	22,3%	100,0%
The cafeteria should stay open later at night	Count	134	98	139	114	140	625
	%	21,4%	15,7%	22,2%	18,2%	22,4%	100,0%

… continues

Restaurant: Camp for which you are completing this section:

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Olifants	51	6,1	22,9	22,9
	Shingwedzi	5	0,6	2,2	25,1
	Letaba	26	3,1	11,7	36,8
	Punda Maria	3	0,4	1,3	38,1
	Mopani	5	0,6	2,2	40,4
	Satara	47	5,6	21,1	61,4
	Berg-en-Dal	20	2,4	9,0	70,4
	Skukuza	26	3,1	11,7	82,1
	Lower Sabie	35	4,2	15,7	97,8
	Pretoriuskop	3	0,4	1,3	99,1
	Biyamiti	2	0,2	0,9	100,0
	Total	223	26,7	100,0	
Missing	System	613	73,3		
Total		836	100.0		

Restaurant: Responses to items

		Strongly disagree	2	3	4	Strongly agree	Total
The atmosphere in the restaurant is pleasant	Count	12	26	73	210	154	475
	%	2,5%	5,5%	15,4%	44,2%	32,4%	100,0%
Food is well prepared	Count	21	34	72	200	140	467
	%	4,5%	7,3%	15,4%	42,8%	30,0%	100,0%
The variety of dishes offered is adequate	Count	35	52	92	171	114	464
	%	7,5%	11,2%	19,8%	36,9%	24,6%	100,0%
Food is presented attractively	Count	20	38	88	190	128	464
	%	4,3%	8,2%	19,0%	40,9%	27,6%	100,0%
The service in the restaurant is up to standard	Count	24	25	88	191	135	463
	%	5,2%	5,4%	19,0%	41,3%	29,2%	100,0%
Food appears wholesome and healthy	Count	19	33	101	199	108	460
	%	4,1%	7,2%	22,0%	43,3%	23,5%	100,0%
The restaurant offers good value for money	Count	44	63	95	164	97	463
	%	9,5%	13,6%	20,5%	35,4%	21,0%	100,0%
The décor inside the cafeteria is attractive	Count	19	28	84	178	156	465
	%	4,1%	6,0%	18,1%	38,3%	33,5%	100,0%
The staff in the restaurant is friendly and helpful	Count	10	15	63	190	188	466
	%	2,1%	3,2%	13,5%	40,8%	40,3%	100,0%
The type of food offered by the restaurant meets with my expectations	Count	42	45	94	176	106	463
	%	9,1%	9,7%	20,3%	38,0%	22,9%	100,0%
Sufficient variety of health foods are available to choose from	Count	41	62	139	135	67	444
	%	9,2%	14,0%	31,3%	30,4%	15,1%	100,0%

… continues

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		Strongly disagree	2	3	4	Strongly agree	Total
The restaurant atmosphere fits and enhances the "Kruger bush experience"	Count	21	32	101	178	132	464
	%	4,5%	6,9%	21,8%	38,4%	28,4%	100,0%
Meals are reasonably priced	Count	56	68	104	167	71	466
	%	12,0%	14,6%	22,3%	35,8%	15,2%	100,0%
The menu caters for special diets	Count	53	66	159	70	35	383
	%	13,8%	17,2%	41,5%	18,3%	9,1%	100,0%
The restaurant's business hours suit my needs	Count	12	24	81	198	144	459
	%	2,6%	5,2%	17,6%	43,1%	31,4%	100,0%
The restaurant is well positioned to allow tourists to experience nature	Count	14	19	78	164	193	468
	%	3,0%	4,1%	16,7%	35,0%	41,2%	100,0%
The external appearance of the restaurant is imaginative	Count	18	35	124	167	121	465
	%	3,9%	7,5%	26,7%	35,9%	26,0%	100,0%
The décor inside the restaurant is suitable	Count	16	29	84	182	154	465
	%	3,4%	6,2%	18,1%	39,1%	33,1%	100,0%
The restaurant is easily accessible	Count	5	7	39	210	208	469
	%	1,1%	1,5%	8,3%	44,8%	44,3%	100,0%
Bar facilities at the restaurant are adequate	Count	15	25	66	193	130	429
	%	3,5%	5,8%	15,4%	45,0%	30,3%	100,0%
The restaurant should stay open later at night	Count	96	70	129	84	76	455
	%	21,1%	15,4%	28,4%	18,5%	16,7%	100,0%

Shop: Camp for which you are completing this section:

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Olifants	68	8,1	23,4	23,4
	Shingwedzi	6	0,7	2,1	25,5
	Letaba	31	3,7	10,7	36,2
	Punda Maria	5	0,6	1,7	37,9
	Mopani	6	0,7	2,1	40,0
	Satara	45	5,4	15,5	55,5
	Berg-en-Dal	25	3,0	8,6	64,1
	Skukuza	42	5,0	14,5	78,6
	Lower Sabie	41	4,9	14,1	92,8
	Orpen	1	0,1	0,3	93,1
	Pretoriuskop	7	0,8	2,4	95,5
	Crocodile camp	9	1,1	3,1	98,6
	Biyamiti	1	0,1	0,3	99,0
	All	3	0,4	1,0	100,0
	Total	290	34,7	100,0	
Missing	System	546	65,3		
Total		836	100,0		

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Shop: Responses to items

		Strongly disagree	2	3	4	Strongly agree	Total
The atmosphere of the shop is pleasant	Count	18	31	145	326	244	764
	%	2,4%	4,1%	19,0%	42,7%	31,9%	100,0%
The shop stocks high quality groceries	Count	21	69	169	334	162	755
	%	2,8%	9,1%	22,4%	44,2%	21,5%	100,0%
Souvenirs in the shop are of high quality	Count	15	42	157	339	200	753
	%	2,0%	5,6%	20,8%	45,0%	26,6%	100,0%
The shop offers a sufficient variety of items	Count	12	45	122	361	224	764
	%	1,6%	5,9%	16,0%	47,3%	29,3%	100,0%
The shop stocks interesting products	Count	12	47	151	349	203	762
	%	1,6%	6,2%	19,8%	45,8%	26,6%	100,0%
Most items sold in the shop are useful during a KNP visit	Count	8	37	128	372	216	761
	%	1,1%	4,9%	16,8%	48,9%	28,4%	100,0%
The shop sells attractive curio items	Count	21	41	150	326	217	755
	%	2,8%	5,4%	19,9%	43,2%	28,7%	100,0%
KNP shops should sell luxury items	Count	221	163	210	98	65	757
	%	29,2%	21,5%	27,7%	12,9%	8,6%	100,0%
I can buy necessary items for my KNP visit in the shop	Count	14	25	95	341	289	764
	%	1,8%	3,3%	12,4%	44,6%	37,8%	100,0%
The service in the shop is good	Count	22	44	113	319	267	765
	%	2,9%	5,8%	14,8%	41,7%	34,9%	100,0%
The shop offers good value for money	Count	84	123	204	235	115	761
	%	11,0%	16,2%	26,8%	30,9%	15,1%	100,0%
Perishable foods are mostly fresh	Count	36	90	192	298	128	744
	%	4,8%	12,1%	25,8%	40,1%	17,2%	100,0%
The type of items offered by the shop meet with my expectations	Count	17	61	161	329	191	759
	%	2,2%	8,0%	21,2%	43,3%	25,2%	100,0%
The range of goods offered in the shop meets with my expectation	Count	15	58	151	342	194	760
	%	2,0%	7,6%	19,9%	45,0%	25,5%	100,0%
The food sold in the shop is reasonably priced	Count	95	106	208	266	84	759
	%	12,5%	14,0%	27,4%	35,0%	11,1%	100,0%
I prefer to bring my self-catering ingredients with me	Count	74	77	113	180	305	749
	%	9,9%	10,3%	15,1%	24,0%	40,7%	100,0%
The shop's business hours suit my needs	Count	32	50	91	302	286	761
	%	4,2%	6,6%	12,0%	39,7%	37,6%	100,0%
The shop is easily accessible	Count	1	5	52	312	392	762
	%	,1%	0,7%	6,8%	40,9%	51,4%	100,0%
I buy only basic items such as milk, bread and firewood at the shop	Count	100	116	141	175	215	747
	%	13,4%	15,5%	18,9%	23,4%	28,8%	100,0%

Accommodation: Camp for which you are completing this section:

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	**Olifants**	72	8,6	25,7	25,7
	Shingwedzi	8	1,0	2,9	28,6
	Letaba	26	3,1	9,3	37,9
	Punda Maria	1	0,1	0,4	38,2
	Satara	57	6,8	20,4	58,6
	Berg-en-Dal	29	3,5	10,4	68,9
	Balule	1	0,1	0,4	69,3
	Skukuza	24	2,9	8,6	77,9
	Lower Sabie	20	2,4	7,1	85,0
	Pretoriuskop	9	1,1	3,2	88,2
	Crocodile camp	7	0,8	2,5	90,7
	Biyamiti	22	2,6	7,9	98,6
	All	4	0,5	1,4	100,0
	Total	280	33,5	100,0	
Missing	**System**	556	66,5		
Total		836	100,0		

Accommodation: Responses to items

		Strongly disagree	2	3	4	Strongly agree	Total
The atmosphere of the accommodation facilities is pleasant	**Count**	5	16	68	317	358	764
	%	0,7%	2,1%	8,9%	41,5%	46,9%	100,0%
The quality of the accommodation is high	**Count**	28	58	148	275	248	757
	%	3,7%	7,7%	19,6%	36,3%	32,8%	100,0%
The variety of accommodation offered is sufficient	**Count**	18	43	110	303	275	749
	%	2,4%	5,7%	14,7%	40,5%	36,7%	100,0%
The exteriors of the accommodation units are interesting	**Count**	17	35	128	314	261	755
	%	2,3%	4,6%	17,0%	41,6%	34,6%	100,0%
The interiors of the accommodation units are attractive	**Count**	30	74	173	261	203	741
	%	4,0%	10,0%	23,3%	35,2%	27,4%	100,0%
The accommodations units meets my needs regarding comfort	**Count**	26	46	104	290	275	741
	%	3,5%	6,2%	14,0%	39,1%	37,1%	100,0%
The bathroom facilities meet with my expectations	**Count**	40	57	130	292	241	760
	%	5,3%	7,5%	17,1%	38,4%	31,7%	100,0%
High standards of cleanliness are maintained	**Count**	25	44	103	277	311	760
	%	3,3%	5,8%	13,6%	36,4%	40,9%	100,0%
The service for accommodation is good	**Count**	12	22	107	313	295	749
	%	1,6%	2,9%	14,3%	41,8%	39,4%	100,0%
The accommodation offers good value for money	**Count**	33	55	148	279	237	752
	%	4,4%	7,3%	19,7%	37,1%	31,5%	100,0%

… continues

		Strongly disagree	2	3	4	Strongly agree	Total
The type of accommodation offered meets with my expectations	Count	20	38	100	324	275	757
	%	2,6%	5,0%	13,2%	42,8%	36,3%	100,0%
The accommodation offers an exclusive bush experience	Count	28	60	158	272	237	755
	%	3,7%	7,9%	20,9%	36,0%	31,4%	100,0%
Check-in times for accommodation are convenient	Count	16	31	85	350	275	757
	%	2,1%	4,1%	11,2%	46,2%	36,3%	100,0%
Check-out times for accommodation are convenient	Count	30	72	117	296	237	752
	%	4,0%	9,6%	15,6%	39,4%	31,5%	100,0%
Decorations in the huts are tasteful	Count	51	83	188	253	144	719
	%	7,1%	11,5%	26,1%	35,2%	20,0%	100,0%
Accommodation neatness is up to standard	Count	13	44	104	308	269	738
	%	1,8%	6,0%	14,1%	41,7%	36,4%	100,0%
KNP accommodation rates compare favourably with similar accommodation elsewhere	Count	52	53	164	250	210	729
	%	7,1%	7,3%	22,5%	34,3%	28,8%	100,0%
The rates for the various kinds of accommodation are fair	Count	40	60	171	291	178	740
	%	5,4%	8,1%	23,1%	39,3%	24,1%	100,0%
The standards of facilities in the huts match the cost	Count	53	76	154	257	179	719
	%	7,4%	10,6%	21,4%	35,7%	24,9%	100,0%
The variety of affordable accommodation options is adequate	Count	38	71	159	272	191	731
	%	5,2%	9,7%	21,8%	37,2%	26,1%	100,0%
There should be more options for luxury accommodation in the park	Count	227	141	150	115	116	749
	%	30,3%	18,8%	20,0%	15,4%	15,5%	100,0%

Reception: Camp for which you are completing this section:

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Olifants	58	6,9	23,1	23,1
	Shingwedzi	5	0,6	2,0	25,1
	Letaba	23	2,8	9,2	34,3
	Punda Maria	2	0,2	0,8	35,1
	Mopani	1	0,1	0,4	35,5
	Satara	53	6,3	21,1	56,6
	Berg-en-Dal	31	3,7	12,4	68,9
	Skukuza	25	3,0	10,0	78,9
	Lower Sabie	15	1,8	6,0	84,9
	Pretoriuskop	10	1,2	4,0	88,8
	Crocodile camp	12	1,4	4,8	93,6
	Biyamiti	15	1,8	6,0	99,6
	All	1	0,1	0,4	100,0
	Total	251	30,0	100,0	
Missing	System	585	70,0		
Total		836	100,0		

… continues

Reception: Responses to items

		Strongly disagree	2	3	4	Strongly agree	Total
The reception area has a pleasant atmosphere	Count	10	19	100	310	321	760
	%	1,3%	2,5%	13,2%	40,8%	42,2%	100,0%
The reception office is attractive	Count	7	41	141	283	291	763
	%	,9%	5,4%	18,5%	37,1%	38,1%	100,0%
Staff members at reception are competent	Count	19	23	78	292	351	763
	%	2,5%	3,0%	10,2%	38,3%	46,0%	100,0%
Staff members at reception are helpful	Count	15	22	60	282	384	763
	%	2,0%	2,9%	7,9%	37,0%	50,3%	100,0%
Staff members at reception are friendly	Count	16	22	61	254	410	763
	%	2,1%	2,9%	8,0%	33,3%	53,7%	100,0%
The quality of service at reception is good	Count	22	25	85	279	350	761
	%	2,9%	3,3%	11,2%	36,7%	46,0%	100,0%
The information offered by receptions staff is good	Count	25	27	114	294	297	757
	%	3,3%	3,6%	15,1%	38,8%	39,2%	100,0%
There is too much queuing at reception	Count	242	198	123	119	65	747
	%	32,4%	26,5%	16,5%	15,9%	8,7%	100,0%
Reception's business hours are adequate	Count	8	21	89	329	299	746
	%	1,1%	2,8%	11,9%	44,1%	40,1%	100,0%
Reception is easily accessible	Count	2	5	43	301	408	759
	%	,3%	0,7%	5,7%	39,7%	53,8%	100,0%
Reception hours are convenient	Count	6	20	74	310	340	750
	%	,8%	2,7%	9,9%	41,3%	45,3%	100,0%

ANNEXURE 8
USER SURVEY ON OUTSOURCING ACCOMMODATION
IN THE KRUGER NATIONAL PARK

In order to give the staff at *South African National Parks* the opportunity to focus on their core business, biodiversity conservation, we are presently investigating the possibility of outsourcing the accommodation facilities, which has become the trend in conservation areas worldwide. For this purpose you are kindly requested to complete the following questionnaire.

YOUR COUNTRY OF ORIGIN (Please mark with an X)		
South Africa	Rest of Africa	Overseas

SIZE OF YOUR PARTY (Please mark with an X)		
Individuals or family group	Small tour group (6-10)	Large tour group

FREQUENCY OF YOUR VISITS TO THE PARK (Please mark with an X)				
First visit	Occasional visit (less than once a year)	Once a year	Two or three times a year	More than three times a year

1. Did you stay overnight in one of the camps in Kruger or have you stayed overnight in the past?

    YES / NO ……………………………………

Name of camp:

Please rate your overall satisfaction of accommodation in the camp				
1	**2**	**3**	**4**	**5**
Not at all satisfied	A little dissatisfied	Satisfied	Very satisfied	Delighted

2. How do you feel about *accommodation outsourcing* i.e. that private operators manage the accommodation facilities on a concession basis?

    ....
    ....
    ....

3. Outsourcing may result in improved accommodation facilities but this also implies charging market related prices. If there were an increase in fees, would you still come to the Park? YES/NO

4. As South Africans are already paying tax and contributing to the *National Conservation Fund*, do you think it would be acceptable to charge foreigners more for accommodation? YES / NO   - IF YES…………..

50% more than the price	Double the price	Three times the price	More than three times the price

5. Your recommendations for improving accommodation facilities at the park

    ....
    ....

Thank you for your cooperation.

ANNEXURE 9
KRUGER NATIONAL PARK OUTSOURCING QUESTIONNAIRE CODES

ID (text): 001-400

Country

South Africa	1
Rest of Africa	2
Overseas	3

CountrTx (text)

If country of origin is specified for the overseas and rest of Africa visitors then type it in.

Size

Individuals/ family/ friends	1
Small tour group (6-10)	2
Large tour group	3

Visits

First visit	1
Occasional visit	2
Once a year	3
Two/ three times a year	4
More than three times a year	5

Overnite (Q1)

Yes	1
No	2

Camp (Q1)

Berg-en-Dal	1
Crocodile Bridge	2
Letaba	3
Lower Sabie	4
Malelane	5
Mopani	6
Olifants	7
Pretoriuskop	8
Punda Maria	9
Satara	10
Shingwedzi	11
Skukuza	12
Talamathi	13
Tambotie	14
More than three camps	15
Biyamiti	16

… continues

<u>Happy</u> (Q1)

Not at all satisfied	1
A little dissatisfied	2
Satisfied	3
Very satisfied	4
Delighted	5

<u>Outsource</u> (Q2)

For	1
Not sure	0
Against	-1

<u>OutsourceTx</u> (Q2 text)

Type in text

<u>Fees</u> (Q3)

Yes	1
Not sure	0
No	-1

<u>FeesTxt</u> (Q3 text)

Type in text (if any)

<u>Foreign</u> (Q4)

Yes	1
Not sure	0
No	-1

<u>Amount</u> (Q4)

If not specified leave blank

50% more	1
Double	2
Three times	3
More than three times	4

<u>AmtTxt</u> (Q4 text)

Type in text (if any)

<u>Improve</u> (Q5 text)

Type in text

ANNEXURE 10
SURVEY ON RELATIONSHIPS BETWEEN THE KRUGER NATIONAL PARK AND NEIGHBOURING COMMUNITIES

What is this questionnaire about? The Kruger National Park (KNP) management is presently investigating better ways of community involvement. The purpose of this questionnaire is to assess the perceptions of communities living around the KNP on community facilitation, environmental education / interpretation; economic empowerment and cultural heritage management. Eventually the information gathered could be used in the development of an *eco-tourism model*, which could hopefully be used in national parks world-wide.

Please note that there are no right or wrong answers to the questions. The respondents will also remain anonymous. The results will be presented to the local municipalities as well as to the existing forums for communication between the KNP and her neighbours.

What is expected of you? You are kindly requested to complete the following questionnaire, which consists of three parts:

Section A: Consists of biographical and general information. Although some personal information is required for research purposes, no names are asked. The questionnaire is therefore completed anonymously.

Section B: Consists of qualitative questions with the aim of getting your views on the benefits the KNP could hold for local communities as well as your ideas on possible future communication structures. Even if you have never visited the KNP you might have some valuable ideas and perceptions!

Section C: Consists of statements to which you are requested to indicate your level of agreement or disagreement on a 5-point scale.

Time frame for completion of the questionnaire? You should be able to complete the questionnaire in approximately 30 minutes. Please complete ALL the questions.

Thank you for your support

David Mabunda
RESEARCHER

PLEASE MARK YOUR RESPONSES WITH AN "X" IN THE APPROPRIATE BLOCK OR GIVE THE INFORMATION ASKED. PUT A QUESTION MARK (?) NEXT TO ANY QUESTIONS WHERE YOU DO NOT KNOW THE ANSWER.

SECTION A: BIOGRAPHICAL AND GENERAL INFORMATION

1.   Gender: Male / Female

2.   Age group

Under 20	20 – 29	30-39	40-49	50-59	Over 60	

3.   Home language

ShiVenda	Siswati	IsiZulu	isiXhosa
IsiNdebele	Sesotho	Setswana	xiTsonga
Afrikaans	English	Sepedi	

4.   How long have you lived in this community? _____years

5.   Name of village: _____

6.   Tribal area: _____

7.   Have you ever visited the KNP for recreational purposes?   Yes / No

8.   How often have you visited the KNP as a tourist?

1 -2 times	3-5 times	6-10 times	More than 10

9.   Have you ever stayed overnight in the KNP at a tourist?   Yes / No

10.   Do any of your family work for the KNP?   Yes / No

11.   Have you ever worked for the KNP?   Yes / No

12.   Do you know of any formal meetings between the KNP and your community?

Yes / No

SECTION B: QUALITATIVE QUESTIONS

PLEASE PROVIDE US WITH A SHORT EXPLANATION TO EACH OF THE FOLLOWING QUESTIONS

13.   Is there a difference between a national park, such as the KNP and a private lodge? Explain your answer.
....
....

14.   Suppose you have the money, would KNP be your preferred recreational destination and why or why not?
....

15.   Does your community benefit in any way from the existence of the KNP and if so how?
....

16.   Have you personally benefited from the existence of the KNP and if so how?
....

17.   Do you have any ideas how you think the communities could benefit more from the existence of the KNP in the future?
....

… continues

18.   Is it necessary for the leaders of your community to meet with the KNP management?
....

19.   How would you structure these meetings to ensure that the communication between the communities and the KNP is effective and what issues should they discuss?
....

20.   How often should meetings with the KNP management take place and where should the meetings be held?
....

21.   If you had the opportunity to meet with the KNP management, what issues would **you** want to discuss with them?
....

22.   Do you support the people providing arts and crafts and if so why?
....

23.   Over the years carvers bordering the KNP have been using natural resources to produce their artefacts. Do you think that it is right that they should plough back into nature and if so how?
....

24.   Do you think that the KNP slogan "xa-mina xa-wena" (which implies that the KNP belongs to us all) is true and explain why or why not?
....

25.   Some people believe that the communities bordering the KNP should be allowed to benefit from the existence of the park by collecting firewood, obtaining medicinal plants, and thatching. What is your opinion?
....

26.   Some people believe that the communities bordering the KNP should be allowed to graze their livestock in the park. What is your opinion?
....

27.   Some people believe that the communities bordering the KNP should be allowed to hunt in the park. What is your opinion?
....

SECTION C: QUANTITATIVE QUESTIONS

Please respond to the following statements by ticking one of the blocks on a 5-Point scale to indicate your view (Your view could range from *One = strongly disagree* to *five = strongly agree*).   **Put a question mark next to any questions where you do not know the answer.**

28.   I love nature and I believe one should protect the natural environment.
        Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree

29.   Nature should be protected for future generations.
        Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree

30.   People from neighbouring communities should be well educated about nature conservation.
        Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree

31.   I am of the opinion that the KNP is primarily there to protect nature.
        Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree

32.   As a South African I feel proud of the KNP as our symbol of natural heritage.
        Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree

33.   The admission fee of R30 per person per day for day visitors is reasonable.
        Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree

… continues

34.   The prices for accommodation in the KNP are reasonable.
       Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree

35.   Prices of shops and restaurants in the KNP are reasonable.
       Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree

36.   Local communities should be given a special admission fee to the Park.
       Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree

37.   Local communities should be given their own rate for accommodation in the Park.
       Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree

38.   Tourists travelling to the KNP bring much needed revenue to local people by purchasing goods along the road.
       Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree

39.   Tourists travelling to the KNP are pushing prices up, (such as food and household commodities) and making it more expensive for locals.
       Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree

40.   Tourists to the KNP should be encouraged to spend time in the neighbouring communities to learn about local culture, lifestyle and food.
       Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree

41.   One of the benefits of the existence of the KNP is that it provides direct and indirect job opportunities to local people.
       Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree

42.   If culling is implemented, KNP management should make animal by-products harvested available to local people at reasonable prices.
       Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree

43.   The KNP management should invest a percentage of its tourism profits into the development of community facilities such as roads, schools, clinics etc.
       Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree

44.   Supplies to the KNP's shops and restaurants should be sourced from neighbouring communities.
       Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree

45.   Animals escaping from the park are a problem as they cause damage such as destroying of crops, livestock and human life.
       Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree

46.   The existence of the KNP brings improvement to local standards of living.
       Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree

47.   Local communities should be consulted in the development of tourism policy for the KNP.
       Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree

48.   The KNP has an important role to play in terms of protecting the heritage of the people.
       Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree

49.   I view the KNP as my own pride and joy.
       Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree

       Thank you for your time and effort to complete this questionnaire!

ANNEXURE 11
FREQUENCY DISTRIBUTION OF ANSWERS PER QUESTION ON COMMUNITY QUESTIONNAIRE

Q28   I love nature and I believe one should protect the natural environment
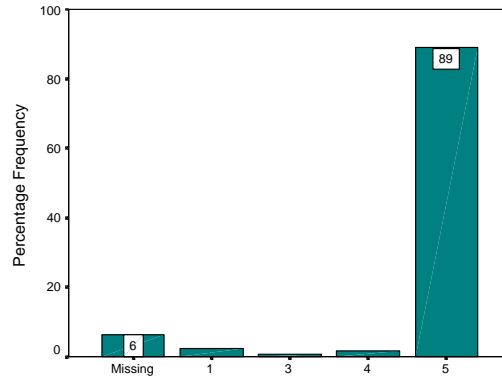
Q29:   Nature should be protected for future generations
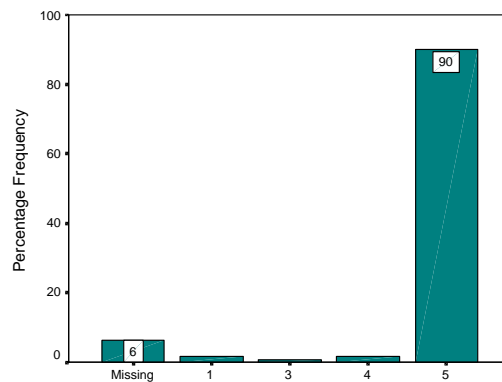
Q30:   People from neighbouring communities should be well educated about nature conservation

… continues

283
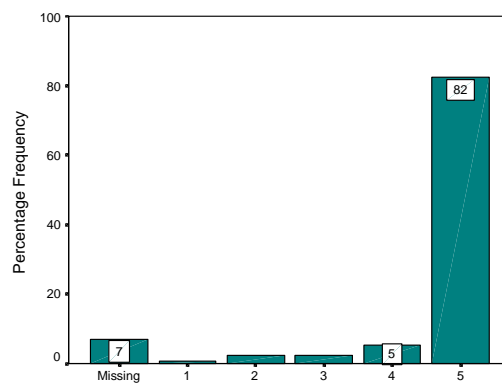
Q31:   I am of the opinion that the KNP is primarily there to protect nature
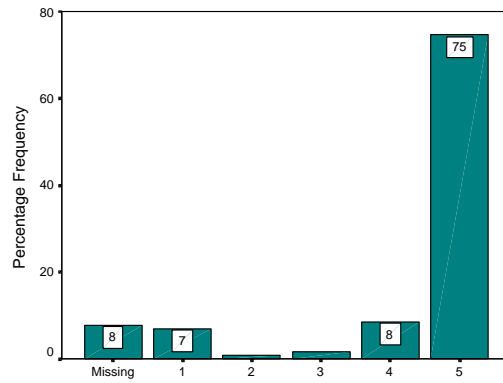
Q31

Q32:   I view the KNP as my own pride and joy
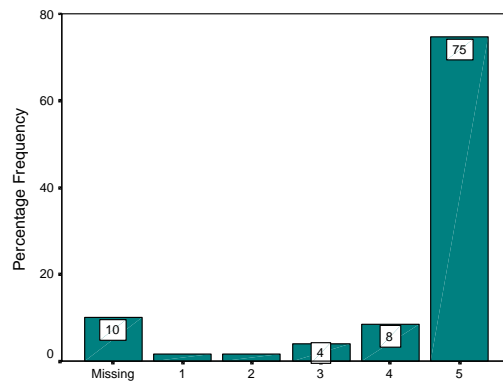
Q32

Q33:   The admission fee of R30 per person per day for day visitors is reasonable
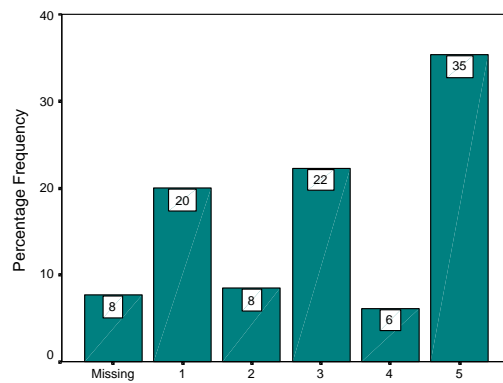
Q33

… continues

Q34: The prices for accommodation in the KNP are reasonable
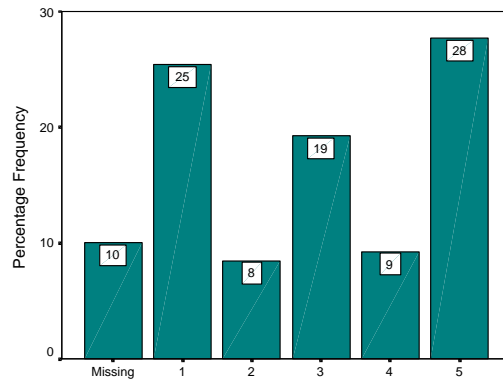
Q34

Q35: Prices of shops and restaurants in the KNP are reasonable
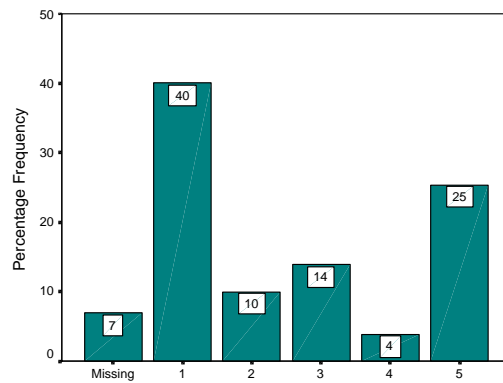
Q35

Q36: Local communities should be given a special admission fee to the park
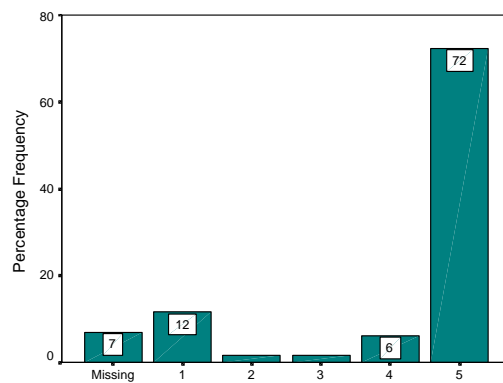
Q36

… continues

Q37:   Local communities should be given their own rate for accommodation in the park.
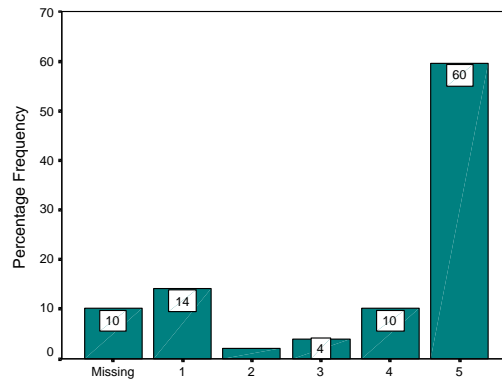
Q37

Q38:   Tourists travelling to the KNP bring much needed revenue to local people by purchasing goods along the road
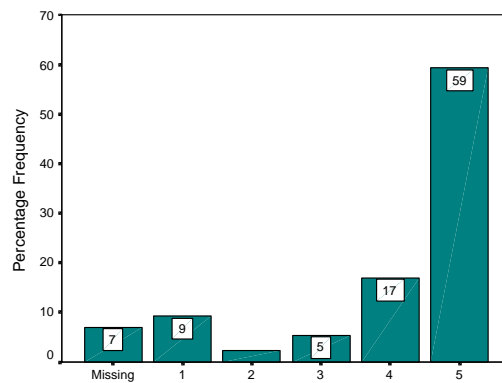
Q38

Q39:   Tourists travelling to the KNP are pushing prices up (such as food and household commodities) and making it more expensive for locals.

Q39

… continues
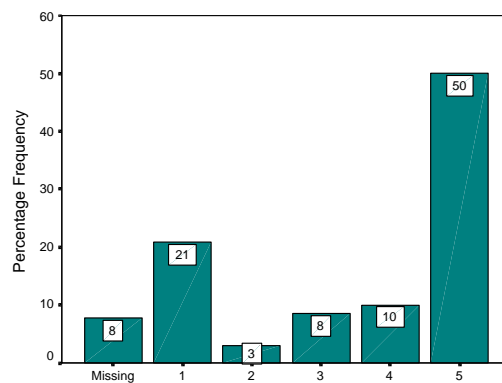
Q40: Tourists to the KNP should be encouraged to spend time in the neighbouring communities to learn about local culture, lifestyle and food.
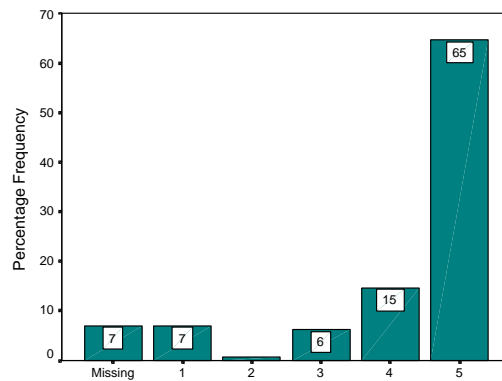
Q40

Q41: One of the benefits of the existence of the KNP is that it provides direct and indirect job opportunities to local people
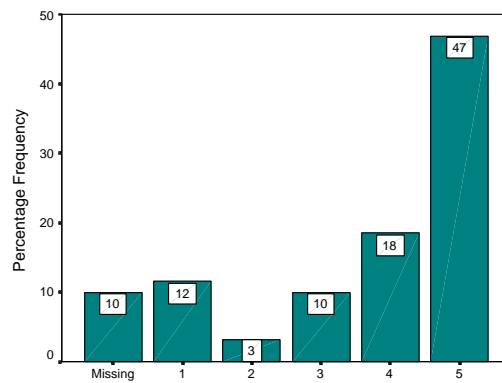
Q41

Q42: If culling is implemented, KNP management should make animal by-products harvested available to local people at reasonable prices

Q42

… continues

287
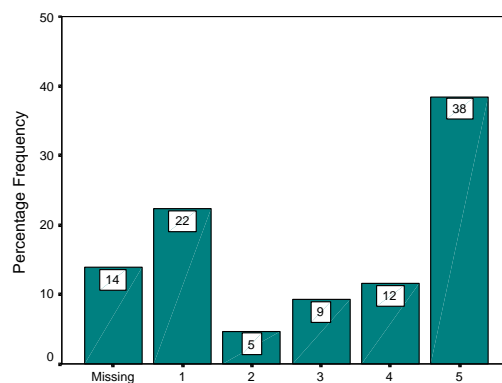
Q43:   The KNP management should invest a percentage of its tourism profits into the development of community facilities such as roads, schools, clinics, etc.
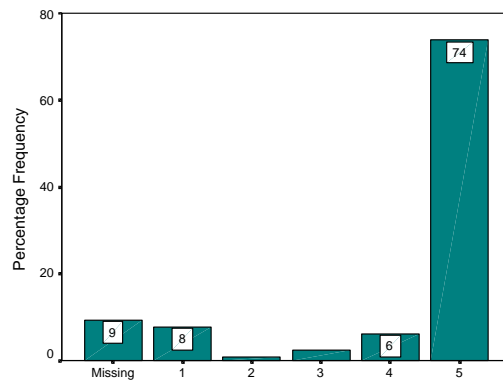
Q43

Q44:   Supplies to the KNP shops and restaurants should be sourced from neighbouring communities
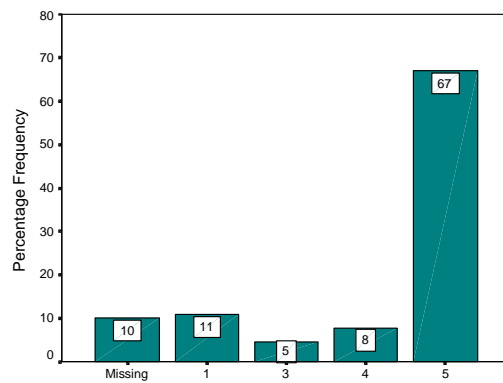
Q44

Q45:   Animals escaping from the park are a problem as they cause damage such as destroying of crops, livestock and human life

Q45

… continues
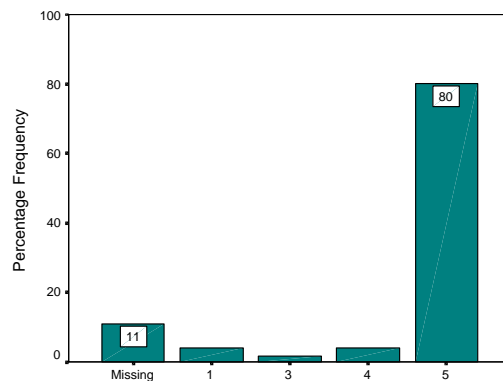
Q46:   The esixtence of the KNP brings improvement to local standards of living
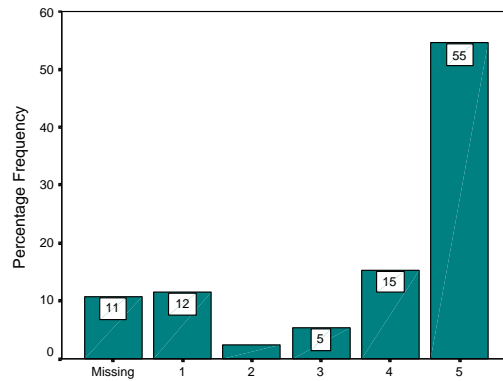
Q46

Q47:   Local communities should be consulted in the development of tourism policy for the KNP.
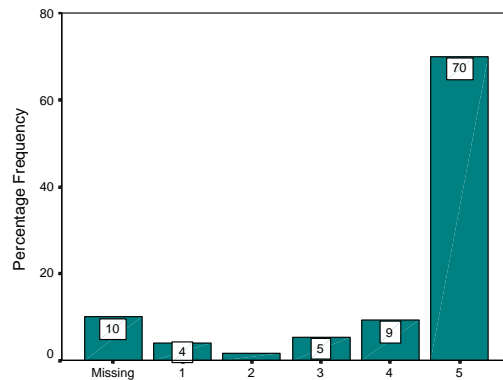
Q47

Q48:   The KNP has an important role to play in terms of protecting the heritage of the people.
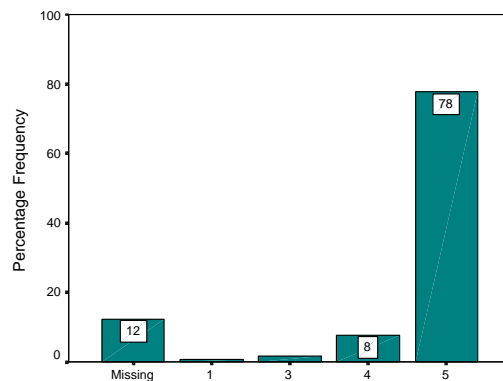
Q48

… continues

ANNEXURE 12
INTERVIEW SCHEDULE FOR VALUE-LADDERING

Personal Information

Age

60

Life Stage
- *Stage 1 -*   bachelor stage: young, single people not living at home
- *Stage 2 -*   newly married couple: young, no children
- *Stage 3 -*   full nest 1: youngest child under 6
- *Stage 4 -*   full nest 2: youngest child 6 or older
- *Stage 5 -*   full nest 3: older couple with dependent children
- *Stage 6 -*   empty nest 1: older couple, no children living at home.
- *Stage 7 -*   empty nest 2: older couple, no children living at home. Household head retired.
- *Stage 8 -*   solitary survivor, in labour force
- *Stage 9 -*   solitary survivor, retired.

Stage 6

Language

Afrikaans
English
Sotho
IsiZulu
Other Specify

English

Gender

Male

Characteristics/ Attributes

Destination	Positive pole	Negative pole	Destination
Kenya	Buy about any sighting		
	Fly-over safaris		
	Great migrations		
Biyamiti	Quiet relaxing surroundings		
	Good quality accommodation		
	Doing the hunt on your own		

Value 1

Quiet relaxing surroundings – you feel like being in the bush.

Consequence

No one bothers you, you are in the bush, and there is a private road where there are not a lot of cars making dust and noise.

Consequence

I live and worked in Johannesburg. I want peace and quiet when I come to the bush. We love the bush camps because it is comfortable and very quiet.

Attribute

There is nothing to distract you from just relaxing and doing your own thing.

Value 2

Good quality accommodation – the accommodation is comfortable.

Consequence

There is nothing spectacular about the furniture, but the whole setup is comfortable considering it being in the bush.

Consequence

We love going to the bush, but we don't want to spend a fortune and we don't want to sleep in tents – Biyamiti has got the right balance of it together.

Attribute

Comfort without paying an arm or leg for it – affordable within the accommodation range.

Value 3

Doing the hunt on your own – a lot of people needs a "Jeep-jockey" to show them animals – we like to hunt ourselves.

Consequence

When you get the animals, or whatever you see, it gives you a feeling of satisfaction – it was your hunt and your find.

Consequence

My wife and I do this together. It gives you that feeling of togetherness. You are sharing the satisfaction of finding the animal etc.

Attribute

As a couple you need to do things together to be able to grow together – "hunting" in the Kruger Park gives us as a couple the chance to do something together – yes it is good for the marriage.

ANNEXURE 13
SWOT ANALYSIS EXERCISE

STRENGTHS

DESCRIPTION	TRENDS	DEVELOPMENTAL ACTION
Established infrastructure (tourism plant, roads network & products)	High cost of infrastructure and services	Optimize utilization of available capacity
Loyal staff with long service	Employment runs according to family lines	Staff training to upgrade knowledge
Favourable exchange rate for foreign visitors	KNP becoming a more popular destination for foreign visitors	More effective marketing locally and internationally
Safe holiday destination	Relatively safe compared to the rest of the country especially Gauteng	Market as such and portray as part of KNP's image
World renown brand name	Increasing awareness from all over the world	Develop adventure activities to add value to the customer's experience
Educational levels of skilled staff (scientists, rangers, guides) are of world class	Setting high standards of interpretative products	Publish research works in internationally acclaimed journals
Strong support network in place	Effective communication and support structure	Standard of conservation services to the benefit of all citizens
Excellent pool of technically qualified support staff in infrastructure building and maintenance	Qualified technical experts such as engineers, technicians and artisans	Assist with training of trade workers
Communication network infrastructure in place	Network system in place to cater for all administration a financial system management	Effective use of the systems to achieve management objectives. Further training of more staff in using the system
Existence of planning tools for tourism, e.g. ROZ Plan.	Feasibility studies and EIAs before development projects.	Develop indicators of thresholds of potential concerns for tourism.

WEAKNESSES

DESCRIPTION	TRENDS	DEVELOPMENTAL ACTION
Lack of a vision and an integrated tourism management plan	Ad hoc development of plans, programmes and products leading to poor quality of services and products	Develop a comprehensive strategic tourism management plan for the KNP
Ineffective and costly reservations system with little support from central reservations	Guests are irritated by inability to provide a professional reservation and front office system	Devise new customer and user-friendly system
Limited financial resources	Over-dependence on decreasing government grants & donations	Strengthen business unit system better to generate more revenue through better performance
Very hot summer climate	No swimming pools in certain camps	Provide all camps with swimming pools
Malaria risk	Visitors are scared of malaria	Demonstrate how KNP fights malaria in conjunction with Provincial Health Departments

DESCRIPTION	TRENDS	DEVELOPMENTAL ACTION
Distance from cities	Increase in fuel and toll road prices	Sell affordable out of season packages
Lack of adequate facilities for day visitors	Conflict between day and overnight visitors for camp facilities	Expand the outside camps day visitor areas with bush surroundings
Lack of recreational facilities and activities inside the camps	Families are looking for recreational facilities for their children	Provide facilities such as swimming pools, play grounds and internet café
Poor staff accommodation	Staff demoralized because of housing shortages & congestion in staff compounds. Unfriendly attitude towards guests	Provide adequate accommodation for essential staff. Non-essential staff must live at their homes and commute to work daily
Outdated interior décor in accommodation units	Falling out of line with industry norm	Effective refurbishment plans plus adequate availability of funds
Low capital and maintenance budget	Capital budget not sufficient to cover maintenance and new recapitalization projects	Generate more revenue from commercial operations and set up a sufficient capital and maintenance budget
Lack of customer service culture among staff	Staff working in direct contact with guests is unskilled and has low training levels (e.g. housekeeping)	Training in customer services for staff is imperative and set up information desks or kiosks
Lack of adequate information brochures, pamphlets, etc	First time visitors do not know where to go and how to get around	More user-friendly info-packs, brochures and be made available at information desks or kiosks
Poor standards of MICE facilities	Growing MICE market in RSA. Ability to add wilderness experience to delegates	Provide more professional MICE facilities with state of the art equipment
Inconsistency in service standards	Camps provide services of varying standards and qualities	Intensive training programmes for staff. Involve Technikons and Universities
Inadequate funding for staff training and development	Need for multi-skilled staff	Develop a strategic training and development programme for staff. Liaise with THETA
Pricing problems	Inconsistencies in pricing of products and goods	Develop a pricing policy
Camps not graded according to market segments	Lack of diversity and flexibility in product range and poor service	Consult Grading Council and grade camps into segments
Low remuneration packages.	High turn-over of professional and skilled staff. Inability to attract highly qualified staff.	Benchmark salary packages with the market. Introduce performance contract employment for managers.

OPPORTUNITIES

DESCRIPTION	TRENDS	DEVELOPMENTAL ACTIONS
Effective marketing	Growing competition base	Aggressive and effective marketing campaign / Internet marketing
Multi-skilled labour market	Demand for multi-skilled staff	Training programmes plus market-related salary packages

DESCRIPTION	TRENDS	DEVELOPMENTAL ACTIONS
Growing demand for ecotourism products	New competitors entering the market	Develop customer-focused products
Great Limpopo Transfrontier Park	Worldwide phenomenon in conservation management	Enhanced tourism opportunities for KNP to improve northern camps occupancies
New Regional Airport (Kruger Mpumalanga International Airport	Chartered and scheduled international flights to link up with Cape Town, Durban & Sun City	Increased occupancies for KNP with more volumes because of easy and affordable airlink
Adopting new pricing policy	An established practice in other countries	Capacity to enhance income generation
All inclusive packaged holiday destination	An established practice in the Tourism industry	Customers should be able to book all services and products online before leaving their homes for the holiday
Becoming business orientated	Cost-effective and financially feasible approach	Providing a professional approach
Reliable financial and visitor information readily available	Integrity of data questionable	Expenditure and cost allocation control
Government support for SANParks.	SANParks called upon to lead country conservation initiatives such as Transfrontier Parks and the World Parks Congress.	Use political support to leverage allocation of more resources for capital projects.

THREATS

DESCRIPTION	TRENDS	DEVELOPMENTAL ACTIONS
Poor services in the restaurants and cafeteria	Complaints are increasing	Performance contract for the concessionaire or cancellation of the contract
Competitive standards of other product owners	Competition focus on excellent customer service	Improve service standards
Malaria	Guests worried about risks of contracting malaria	Proper communication as well as preventive measures
Outbreak of wildlife-related diseases such as foot & mouth. Bovine TB, etc	Decreasing and not communicable to human beings	Proper PR strategy to allay visitors' fears
Poaching	Under control and stable	Communicate successes against poachers to reassure the public
Crime	Petty theft of guests' property by staff, rooms in KNP have no locks, hijackings of visitors en route to the KNP	Install safes and locks in chalets; vet staff, join hands with local police in fighting crime against tourists, render assistance to tourists who fall victims of crime on their way to the park
Volatile market with currency changes.	Western hemisphere currencies are stronger than the rand.	Introduce a dual pricing policy for all products.

MISSION STATEMENT AND OBJECTIVES HIERACHY

To develop, manage and enhance a range of sustainable tourism products,

in synergy with the KNP conservation ethic.

This will be done by satisfying evolving market needs, through predictable service excellence*,

high quality standards and infrastructure.

Sound business principles will be used to generate revenue from the tourism initiative to support the

SANParks conservation mandate.

MISSION STATEMENT

Objective 1

Develop an integrated socio-ecological plan to act as a basis for development of sustainable tourism. This plan must embrace social values, be compliant with all reasonable biodiversity conservation needs, embrace the principles of resilience and sustainability and the KNP conservation ethic and be financially viable, and contain practical guidelines, tools and indicators

Objective 2

Study, analyse and respond to current and future market needs in the nature-based tourism sector and develop an appropriate range of products in accordance with the integrated plan

Objective 3

Implement a service-delivery programme for tourism products and manage and enhance these in a quality controlled manner. Interpretation, appreciation of wilderness and of community linkages should form part of the visitor experience.

Objective 4

From service-delivery generate sufficient revenue to allow funding of conservation initiatives, maintenance of infrastructure and contribute to community programmes

Objective 5

Investigate and enhance all underlying enabling factors which promote the success of sustainable tourism

To establish a sense of partnership between the KNP and its neighbours in a manner that contributes to social upliftment good neighbourliness and advancement of conservation goals

Objective 1

Develop an integrated socio-ecological plan to act as a basis for development of sustainable tourism. This plan must embrace social values, be compliant with all reasonable biodiversity conservation needs, embrace the principles of resilience and sustainability and the KNP conservation ethic and be financially viable, and contain practical tools and indicators

| Develop an integrated socio-ecological plan as a base for sustainable tourism | Establish or use existing mechanisms for joint decision-making (inter-disciplinary, interdepartmental and all appropriate stakeholders) | Build common understanding by promoting interchange of information and mutual empathy between different departments and disciplines, and by establishing joint challenges at operational levels | Promote regional consultation by involving an extended range of stakeholders in the tourism-conservation in and around the KNP hence enhancing complementary and integrated products | Understand critical links between tourists, numbers and activities vs thresholds of use and environmental impacts and institute appropriate monitoring and an appropriate monitoring programme built into SAM programme |

Investigate sources of ideas:

KNP Master plan

Social Ecology Plan

McKinsey

Plus fresh and ancillary ideas e.g. Berkes and Folke and resilience ideas from Panarchy

NEMA, IEMP and legislation which will replace it

KNP Exco

Project teams to include wide range of stakeholders

Select concrete examples in which tourism and conservation are mutually interdependent

Involve Science-management tourism days

Communications and PR Section in supporting common understanding

NGOs

Concessionaires

TFCA

Regional stakeholders agencies around the KNP day-quota issue

See Appendix A

Appendix A: BALANCING GOAL

RESEARCH

•Impact of roads: different types; fragmentation effects; impacts of vehicle and human tracks; noise pollution sources and amelioration

•Human footprints at different scales; development saturation profiles limiting tourism footprint by development of more smaller or tented camps vs placing more beds in bigger camps

•Meeting tourism needs with more rustic products

•Effect of modes of transport

•Facilitation of distribution and handling of tourists; use of financial, logistic and other incentives to spread tourists

•Developing a fresh approach to "tourism carrying capacity" issue e.g. Day Quotas

•Mutual impact/influence of adjacent conservation areas

•Feasibility of peripheral development

•Leveraging of unutilised opportunities within ROZ* framework (see goal)

•MONITORING

•Develop a monitoring and evaluation tool (adapt IUCN framework). Develop an appropriate toolbox to balance visitor needs with impacts e.g. Eagles list : VIM, VERP, VAMP, LAC, ROZ*

•Describe procedures and methods of analysis for a range of themes of interest

• Examples of themes of interest: Direct resource use (water, wood, gravel, sand, waste). Development of footprint thresholds and conventional biophysical TPCs.

• Capitalise on relevant sections of existing biophysical monitoring programme, some of which are immediately applicable e.g. erosion (roads)

• Creation and practical deployment of perceptual thresholds (levels of irritation or unacceptability). For an example of perceptual thresholds see existing Wilderness TPCs.

• Threshold should be SMART (Specific, Measurable, Attainable, Realistic and have a Time-frame)

•Because ROZ has been so influential in KNP, and appears to offer much scope for tourism development and modulation (even auditing) a worshop session identified goals related to this:

• scan ROZ and indentify compliance levels and gaps, and develop the use of ROZ as a marketing tool

•Develop an implementation plan for these new ROZ-based activities and products

• Enhance buy-in and legitimacy of ROZ

Objective 2

Study, analyse and respond to current and future market needs in the nature-based tourism sector and develop an appropriate range of products in accordance with the integrated plan

Limited guidance for this goal was available from the workshop, as follows:

• development of ROZ-embedded business opportunities. See * on previous page

• market analysis (suggested at workshop, in our opinion not brought out strongly enough)

• strategic partnerships with other tourism and service organisations (eg car hire/airline)

• increasing need for adequate-level interpretation and related facilities (need for visitor centres and information desks)

We suggest the goal can be further organized and unpacked e.g. risk analysis, linkages with other tourism status and scenario planners etc

Objective 3. Implement a service-delivery programme for tourism products, and manage and enhance this in a quality controlled manner, by providing a continuum of products and services along the full chain of visitor accession, travel, entry, accommodation and experiences (including interpretation, appreciation of wilderness and of community linkages) supported by appropriate marketing.

Advertisement & promotion including visitor loyalty programmes

Reservations

Easy access & signage to the KNP

Gates service

Front Office & Information

Accommodation

Shops & restaurants

Other camp facilities e.g. ablutions, swimming pools, film shows

Enhancement of wilderness appreciation, conservation information and community linkages

Marketing support for all stages in the continuum

Way forward for this goal;

▪Formulate each stub properly by formulating each one as a sub-goal with a verb and meaningful statement

▪Generate underneath each sub-goal explicit objective/s, these should be SMART (Specific, Measurable, Attainable, Realistic and have a Time-frame). If you feel a need for one more general guiding statement in between then generate the specific SMART statement one level lower

Objective 4. Generate from service-delivery sufficient revenue to allow funding of conservation initiatives, maintenance of infrastructure and contribute to community programmes

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Revenue generation oprtions

Entrance fees

Recreation fees

Accommodation fees

Leases and rent fees

Merchandise fees from goods sold at reception

Influence allocation, percentage to KNP and different themes (community projects)

Strategic analysis to determine resource allocation

Funds to be allocated according to strategic contributions

Efficient collection of revenue from all sources

Contractual rates from cocessionnaires

Debtors

Safari Industry rates

Rental of houses

Water & Electricity

Gvt rebates e.g SETAS

Traffic and late arrival fines

Leverage additional funding

Increase of gvt grant for capital projects

Government poverty relief

Fund-raising, (Foundations)

Merchandise sales

Licensing of intellectual property

Charge for parking

Cross-product marketing

Tax-incentive based private investment

Objective 5. Investigate and enhance all underlying enabling factors which promote the success of sustainable tourism

| Appreciate & comply with legal environment relevant to tourism | Management of contractual environment for tourism | Ensure adequate staffing and working conditions | Ensure adequate current and future infrastructure planning and maintenance | Ensure adequate financial resources for tourism in particular for supporting infrastructure | Provide information technology to support successful tourism operation |

Concessionna ires

Contractual parks

Legal compliances

Skills Workplace Plan

As per Blake

Develop plan to secure funding

Research

Internet booking

Reservations system

Internet access for tourists

Tourism White paper

Protected Area legislation

Restitution Act

Plan and launch Friends of KNP Membership Scheme

Other stubs?

ANNEXURE 15
FOURTEEN SCALE MONITORING AND EVALUATION PLAN

1.   PROPERTY MANAGEMENT VALUE

ATTRIBUTES	CRITERIA FOR ASSESSMENT	EVALUATION					MONITORING				
		Excellent	Very good	Satisfactory	Poor	Very poor	Improving generally	Improving slightly	No visible/net change	Declining in some areas	Widespread
RESERVATIONS	Efficiency and responsiveness										
FRONT OFFICE	Check-in and check-out										
HOUSEKEEPING	Room readiness to receive guests Staff assistance with guests Needs in general										

2.   NATURAL ATTRACTION VALUE

ATTRIBUTES	CRITERIA FOR ASSESSMENT	EVALUATION					MONITORING				
		Excellent	Very good	Satisfactory	Poor	Very poor	Improving generally	Improving slightly	No visible/net change	Declining in some areas	Widespread
NATURAL SCENERY	Undisturbed, no human structures										
WILDLIFE	Presence of various species of animals and plants										
WILDERNESS QUALITIES	Atmosphere of peace and tranquillity										
SOILS	Non-eroded, non-compacted trails, campsites, picnic spots, etc										
WATER QUALITY	Unpolluted rivers/ streams										
STATUS OF AIR QUALITY	Unpolluted air, green-house gas emissions minimized										
NATURAL NOISE LEVEL	No artificial noise										
LIGHT IMPACTS	Electric light system promotes opportunity to experience night life and the stars without light pollution										
OVERCROWDING	Noise control in camps										
BUILDINGS	Appearance of buildings blends with environment										

3.   CULTURAL ATTRACTION VALUE

ATTRIBUTES	CRITERIA FOR ASSESSMENT	EVALUATION					MONITORING				
		Excellent	Very good	Satisfactory	Poor	Very poor	Improving generally	Improving slightly	No visible/net change	Declining in some areas	Widespread
CONSERVED STATUS OF INDIGENOUS/ PREHISTORIC COMMUNITIES	Sites adequately protected, no signs of vandalism										
CONSERVED STATUS OF HISTORIC CULTURAL HERITAGE SITES	Sites adequately protected, good interpretation services to appreciate historical/cultural heritage										

4.   ACCESS TO KNP VALUE

ATTRIBUTES	CRITERIA FOR ASSESSMENT	EVALUATION					MONITORING				
		Excellent	Very good	Satisfactory	Poor	Very poor	Improving generally	Improving slightly	No visible/net change	Declining in some areas	Widespread
ROADS NETWORK	Condition of access roads										
AIR TRAVEL	Connection/transfer services from the local airports to the Park										
PUBLIC TRANSPORT	Availability of public transport to individual travellers without private vehicles										

5.   ACCESS WITHIN KNP VALUE

ATTRIBUTES	CRITERIA FOR ASSESSMENT	EVALUATION					MONITORING				
		Excellent	Very good	Satisfactory	Poor	Very poor	Improving generally	Improving slightly	No visible/net change	Declining in some areas	Widespread
ROADS NETWORK CONDITION	Tarred roads										
	Gravel roads										
TRAFFIC CONGESTION	Effect of traffic congestion on game viewing experience										
SIGNAGE	Visible and clear directional signs										

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6.   SERVICES AND FACILITIES VALUE

ATTRIBUTES	CRITERIA FOR ASSESSMENT	EVALUATION					MONITORING				
		Excellent	Very good	Satisfactory	Poor	Very poor	Improving generally	Improving slightly	No visible/net change	Declining in some areas	Widespread
PLANNING	The nature and sophistication of visitor services and facilities are appropriate for a conservation area										
VISITOR SERVICES	There is no unplanned or inconsistent incremental hardening of visitor destination settings										
	There is a diversity of visitor services and facilities for the Park										
CONDITION OF FACILITIES	Visitor services and facilities are designed to reflect the limits of sustainable visitor use for tourism and recreation										
VISITOR SURVEY	The nature of the visitor services and facilities provided are safe and are designed to deal with natural and human caused incidents like fire, storms, weather, extremes, etc.										
PRODUCT AND SERVICE QUALITY	Meeting custiomer expectations										

7.   DIVERSITY OF TOURISM AND RECREATION FACILITIES VALUE

ATTRIBUTES	CRITERIA FOR ASSESSMENT	EVALUATION					MONITORING				
		Excellent	Very good	Satisfactory	Poor	Very poor	Improving generally	Improving slightly	No visible/net change	Declining in some areas	Widespread
DIVERSITY OF TOURISM AND RECREATION FACILITIES	Wide range of appropriate facilities and services to promote wilderness experiences										
	Recreation and wilderness settings are actively managed to maintain a diversity of settings										

8.   **EDUCATION AND INTERPRETATION VALUE**

ATTRIBUTES	CRITERIA FOR ASSESSMENT	EVALUATION					MONITORING				
		Excellent	Very good	Satisfactory	Poor	Very poor	Improving generally	Improving slightly	No visible/net change	Declining in some areas	Widespread
EDUCATION AND LEARNING OPPORTUNITIES	Educational/Interpretation opportunities available to: • school groups • adult education groups • for University students • to neighbouring communities										
QUALITY OF EDUCATION AND INTERPRETATION	Depth of education and interpretation opportunities potentially available and utilized: • learning from oral tradition (elders) • learning from local communities • learning from tourism industry • learning from scientists/ rangers • learning from international conservation experience										
FACILITIES	Educational and interpretation facilities' quality e.g. visitor centres										
EFFECTIVENESS OF INTERPRETATION OFFICERS	Training levels of Education/Interpretation Officers										

9.   **IMPACT OF USE VALUE**

ATTRIBUTES	CRITERIA FOR ASSESSMENT	EVALUATION					MONITORING				
		Excellent	Very good	Satisfactory	Poor	Very poor	Improving generally	Improving slightly	No visible/net change	Declining in some areas	Widespread
FUEL	Energy consumption										
WATER	Water usage/conservation										
GASES	Greenhouse gas reduction										
WASTE DISPOSAL	Solid waste reduction										
	Liquid waste reduction										
NOISE	Noise reduction										
SOCIO-ECONOMIC IMPACT	Socio-economic impact on communities e.g. job creation/ entrepreneurial skills transfer										
TOURIST DAMAGE	Tourist effect on wildlife eg road kills, animal feeding, taking away of souvenirs, etc										

10.   FINANCIAL VIABILITY VALUE

ATTRIBUTES	CRITERIA FOR ASSESSMENT	EVALUATION					MONITORING				
		Excellent	Very good	Satisfactory	Poor	Very poor	Improving generally	Improving slightly	No visible/net change	Declining in some areas	Widespread
CASH MANAGEMENT	Cash flow										
	Tourism income										
	Financing of capital and maintenance programmes										
REVENUE STREAMS	Tourism performance (unit and bed occupancies) **UNIT** **BED**										
	Commercialization of non-core functions										
	Fundraising										
	Concession contracts										
SOCIAL RESPONSABILITY	Social investment in community projects										
	Development assistance										
COMPLIANCES	Compliance with financial codes of practice GAAP & PFMA										

11.   AFFORDABILITY VALUE

ATTRIBUTES	CRITERIA FOR ASSESSMENT	EVALUATION					MONITORING				
		Excellent	Very good	Satisfactory	Poor	Very poor	Improving generally	Improving slightly	No visible/net change	Declining in some areas	Widespread
AFFORDABILITY	Competition for the provision of services and facilities for visitors is effective										
	Demand and supply is carefully managed, consistent with the sustainable limits of visitor use										
	Park user fees value for money										

12.   COMMUNITY PARTICIPATION VALUE

ATTRIBUTES	CRITERIA FOR ASSESSMENT	EVALUATION					MONITORING				
		Excellent	Very good	Satisfactory	Poor	Very poor	Improving generally	Improving slightly	No visible/net change	Declining in some areas	Widespread
COMMUNITY PARTICIPATION	Involvement of communities in conservation and tourism activities										
	Joint projects with communities to improve their well-being										
	Creating education opportunities for the community to learn										

13.   REGIONAL OPPORTUNITIES TOURISM AND RECREATION VALUE

ATTRIBUTES	CRITERIA FOR ASSESSMENT	EVALUATION					MONITORING				
		Excellent	Very good	Satisfactory	Poor	Very poor	Improving generally	Improving slightly	No visible/net change	Declining in some areas	Widespread
INTERACTION WITH LOCAL TOURISM BODIES	Cooperation with local tourism industry on development programmes										
MARKETING	Facilitation of joint marketing and promotion efforts										
DISTRIBUTION CHANNELS OF TOURISTS	Regional resources are managed in an integrated manner										
	Integrated approach in sharing tourism volumes with establishments outside the Park to alleviate overcrowding										

14.   RESEARCH VALUE

ATTRIBUTES	CRITERIA FOR ASSESSMENT	EVALUATION					MONITORING				
		Excellent	Very good	Satisfactory	Poor	Very poor	Improving generally	Improving slightly	No visible/net change	Declining in some areas	Widespread
FUNDING	Visitor use limits										
	Designing facilities and services to meet visitor expectations										
HUMAN CAPITAL	Supply/demand management										
	Visitor satisfaction surveys										
RESEARCH CRITERIA	Quality of visitor experience										
	Forecasts										
	Modelling with impact management techniques										
	Market image										
	Business intelligence										