



South African
NATIONAL PARKS

2015 - 2025

A DECADE OF LEARNING

Tourism Research in SANParks



South African
NATIONAL PARKS

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Cite this report as: Slabbert, L., Moore, K.T.B., Patton, C., Smit, I.P.J. (2026). A Decade of Learning: Tourism Research in SANParks (2015-2025). South African National Parks.

Cover Photo: Marakele National Park, taken by Rudolph de Girardier

FOREWORD

Tourism is the primary source of revenue for South African National Parks (SANParks), contributing between 48% and 63% of total annual income from 2014 to 2024. This income is vital for supporting SANParks' core conservation mandate and for funding socio-economic initiatives, particularly those benefiting communities living adjacent to the parks.

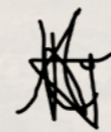
SANParks independently manages over 2 300 accommodation units offering more than 7 000 beds, along with 1 452 campsites that can host over 8 700 campers across 19 national parks spanning six provinces of South Africa. Among these, Table Mountain National Park and Kruger National Park remain two of the country's leading tourist attractions.

This makes SANParks a premier destination for tourism research. Welcoming millions of visitors annually, it offers a wide range of experiences – from self-drive and self-catering options to luxury lodges and exclusive guided tours – catering to diverse visitor preferences and budgets. This diversity provides opportunities for research on various aspects of tourism, including visitor behaviour, socio-economic impacts, responsible tourism, emerging markets, and visitor experience management.

It gives me great pleasure to introduce this publication, which reflects a decade of learning, collaboration, and insight within SANParks' tourism research landscape. The findings and reflections captured here highlight the depth of research conducted across our parks and its growing influence on sustainable tourism management, product development, and visitor experience strategies.

I would like to extend my gratitude to all researchers, SANParks staff, and partner institutions who have contributed to this body of work. Their efforts continue to shape evidence-based decision-making and the future of responsible tourism in South Africa's protected areas.

As SANParks looks to the future, Vision 2040 sets out a new chapter in which conservation and tourism are positioned as interconnected pillars of inclusive growth and environmental resilience. This vision reimagines national parks as living systems that sustain both people and nature. Tourism plays a central role in this transition – not only as a source of revenue, but as a driver of regenerative development that supports livelihoods, strengthens community partnerships, and fosters socio-economic transformation around parks. Within this evolving landscape, research remains an essential enabler of innovation and adaptive management and SANParks embraces research partnerships that advance understanding in this context. As the organisation enters this new chapter, it welcomes collaborative inquiry that generates actionable insights – ensuring that decisions are grounded in evidence and that South Africa's national parks continue to serve as dynamic laboratories for learning, transformation, and responsible stewardship.



Mrs Kaula Mphaphuli
Managing Executive: Tourism Development & Marketing, SANParks

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Photo: Augrabies Falls National Park taken by Rudolph de Gierdier

1.

INTRODUCTION

SANParks plays a pivotal role in South Africa's tourism landscape, being the largest state-run tourism provider and a key driver of responsible tourism. With increasing visitor numbers across its parks, SANParks has continuously adapted its tourism strategy to balance conservation with economic and social sustainability. This has included maintaining subsidies for conservation and socio-economic transformation, as well as cross-subsidizing between parks with differing tourism revenue potential. However, historical challenges such as market maturation, a growing dependence on self-generated tourism income, rising operational costs, and macroeconomic uncertainties have necessitated a more evidence-based approach to tourism management.

Evolution of tourism research in SANParks

Tourism research within SANParks has evolved from a limited, ad hoc activity into a more structured and strategic function supporting evidence-based management. Guided by the Tourism Research Framework developed in 2011, grounded in a social-ecological understanding of tourism in protected areas, the organisation has progressively embedded research into its adaptive management processes. The integration of research into strategic adaptive management became increasingly important to support responsible tourism initiatives, diversify tourism offerings, and enhance visitor experiences. Since 2015, SANParks has expanded its tourism research efforts, incorporating structured processes for identifying knowledge gaps, prioritising research needs, and aligning tourism research with broader strategic goals.

Collaborative research approach

SANParks has embraced a multi-pronged research model that includes close collaboration with academic institutions, internal research capacity development, and the commissioning of research projects. Partnerships with universities and research institutions have facilitated rigorous academic inquiry into tourism dynamics, while in-house research capacity ensures that SANParks can directly engage with tourism trends and operational challenges. Additionally, commissioning external research has allowed SANParks to leverage specialised expertise and industry insights to inform decision-making.

Objectives of tourism research in SANParks

The objectives of tourism research in SANParks are centered on enhancing visitor experiences, promoting responsible tourism, and ensuring the sustainability of tourism operations. The key objectives, as outlined in the latest SANParks Tourism Research Agenda, include:

1. Understanding the visitor and visitor experiences – Gaining insights into visitor demographics, behaviours, expectations, and satisfaction levels to improve tourism offerings.
2. Identifying appropriate markets and products – Researching market trends, new customer segments, and product diversification to maintain competitiveness.
3. Conducting business in a responsible and sustainable manner – Ensuring tourism operations align with sustainability goals, minimise environmental impact, and support local communities.
4. Defining the value of nature-based tourism to society and the economy – Assessing tourism's economic contributions and social benefits, including health and well-being aspects.
5. Enhancing operational efficiency – Evaluating cost-effectiveness, infrastructure maintenance, and service delivery to improve overall tourism operations.

By focusing on these research objectives, SANParks aims to create a tourism framework that balances economic viability, conservation, community beneficiation and visitor satisfaction, ensuring a resilient and sustainable future for national park tourism.

The Research Agenda Process

To guide tourism research effectively, SANParks follows a structured research agenda process implemented every three years. This involves:

- Identifying research needs through consultations with internal stakeholders, including park management and tourism executives.
- Engaging research partners and networks to ensure alignment with national and international tourism trends.
- Prioritising research topics based on strategic importance, urgency, and potential impact.
- Evaluating and reviewing research proposals to ensure methodological rigor and practical relevance.
- Disseminating research findings to inform policy, operational strategies, and tourism development initiatives.

By fostering a structured and dynamic research approach, SANParks aims to ensure that decisions are informed by credible evidence and responsive to changing tourism realities. With a clear framework and structured research process now in place, SANParks has been able to generate a decade's worth of high-quality evidence to guide tourism management and policy decisions. The following section provides an overview of tourism research conducted between 2015 and 2025, highlighting key focus areas, methodological diversity, and the ways in which research findings have informed policies and practices.



Understand the visitor & visitor experience



Identify appropriate markets & products



Conduct business in a responsible & sustainable manner



Define the value of nature-based tourism to society & the economy



Efficient tourism operations

2.

OVERVIEW OF RESEARCH CONDUCTED (2015–2025)

This synthesis of tourism research conducted in South African National Parks (SANParks) between 2015 and 2025 reflects a decade of learning, adaptation, and strategic development. This report aims to showcase the depth and breadth of research initiatives that have shaped and supported evidence-based decision-making across multiple management domains within SANParks. It highlights how structured and collaborative tourism research has become a critical enabler of responsible tourism development, enhanced visitor experience, operational efficiency, and long-term sustainability.

Diversity and breadth of research

The scope of research over the decade encompasses more than 100 reports, publications, thesis and dissertations addressing a wide spectrum of topics – from visitor behaviour and preferences, travel motivations, and willingness to pay, to critical issues such as anti-poaching funding models, climate change impacts, intangible benefits of park visitation, and the role of digital transformation in tourism operations. Research has been conducted across the full park network, with particular depth in iconic parks that attract large numbers of visitors, such as Kruger National Park, Addo Elephant National Park, and Kgalagadi Transfrontier Park. The inclusion of exploratory and applied studies, as well as commissioned investigations and postgraduate research, suggests a balanced commitment to both theoretical insight and practical application.

Broad mix of research designs and partnerships

Methodologically, researchers adopted a diverse range of approaches, from large-scale quantitative visitor surveys and experimental trials to qualitative ethnographic interviews, benchmarking studies, and advanced analytical techniques such as Structural Equation Modelling, GIS mapping, and semantic analysis using Leximancer. The research reflects a multi-pronged approach that integrates in-house expertise, collaborations with universities, and specialised commissioned studies, thereby ensuring both scientific rigour and operational relevance. Increasingly, innovative tools such as AI-based sentiment analysis of social media data, impact evaluations of infrastructure upgrades, and behavioural experiments have expanded methodological agility. This diversity of approaches strengthens the validity of findings and demonstrates how SANParks' research partnerships bridge theory and practice – producing insights that directly inform management decisions.

Research themes and strategic focus areas

The report organises research outputs under six thematic areas:

Theme 1: Resilient and adaptable tourism – This theme reflects SANParks' ongoing effort to strengthen institutional and destination resilience amid a rapidly changing tourism landscape, while recognising the long-term evolution of tourism in South Africa's national parks. Research in this area explores how SANParks has adapted over decades to shifting visitor expectations, emerging travel trends, and societal change – transitioning from a conservation-funding model in the early 20th century to today's hybrid approach that balances commercial viability with ecological integrity.

Studies conducted during and after the COVID-19 period examined how parks can anticipate, absorb, and adapt to uncertainty, ranging from global economic volatility and pandemics to conservation-related crises. This includes work on shifts in visitor travel behaviour, risk perceptions, and spending priorities, which has informed contingency and recovery strategies for operational continuity. Complementary

research examined resilience through a conservation-tourism lens, including visitors' willingness to contribute financially to anti-poaching initiatives in rhino-bearing parks.

Continuous monitoring of domestic and international market trends now forms a key component of SANParks' adaptive management, supporting evidence-based pricing, marketing, and product planning. Collectively, these research efforts – spanning both historical evolution and contemporary adaptation – have strengthened SANParks' capacity to respond proactively to crises, identify emerging risks, and sustain ecological integrity, financial stability, and visitor confidence in a dynamic global environment.

Theme 2: The value of tourism to society – highlights the broad societal value of tourism in national parks, extending beyond biodiversity conservation to encompass economic, psychological, and symbolic dimensions. Research under this theme has demonstrated how time spent in nature contributes to mental health, emotional restoration, and social connection – benefits that became especially visible during the COVID-19 pandemic, when parks offered vital spaces for healing and reflection. Other studies examined the socio-economic contributions of park-based tourism, evaluating how commercialisation initiatives generate employment, stimulate small business development, and create ripple effects in adjacent communities. Complementary work explored the interdependence between conservation and tourism economies, exemplified by a study quantifying the economic and symbolic value of the African Penguin to the regional tourism market. These insights affirm that national parks are not only ecological sanctuaries but also essential public goods that foster community livelihoods, national identity, and the psychological well-being of visitors, making tourism in parks a cornerstone of sustainable development and social resilience.

Theme 3: Responsible and regenerative tourism and environmental challenges – explores the intersection between visitor behaviour, park management, and environmental responsibility, recognising that sustainable tourism depends on both ethical conduct and effective operational systems. Research has addressed a range of pressing environmental issues – from water scarcity and waste reduction to the enforcement of responsible visitor behaviour and the broader implications of climate change. Studies testing behavioural nudges and technology interventions in Kruger National Park revealed that targeted messaging, combined with efficient infrastructure, can significantly reduce water consumption. Research on visitor rule compliance identified widespread participation in deviant leisure practices such as off-road driving and close wildlife encounters, highlighting the need for strengthened environmental ethics, communication, and enforcement strategies. Additional work considered the role of Environmental Control Officers in promoting sustainability and examined how visitor expectations align with SANParks' responsible tourism standards. These studies emphasize that achieving sustainability in protected areas requires continuous alignment between ecological stewardship, visitor engagement, and operational practice – anchoring SANParks' broader shift toward regenerative, rather than merely sustainable, tourism.

Theme 4: Understanding and attracting visitors – encapsulates SANParks' sustained commitment to understanding who its visitors are, why they visit, and how their preferences are evolving in an increasingly diverse tourism landscape. Research has deepened knowledge of overnight visitor behaviour, motivations, and satisfaction, producing one of the most comprehensive segmentation studies undertaken within the organisation. The results reveal a highly loyal, predominantly domestic market with strong intergenerational connections to nature and a preference for multi-park travel experiences. Complementary studies explored the perceptions and participation barriers of underrepresented South African tourists, advancing SANParks' goal of building a more inclusive visitor base. Future-oriented projects such as Tomorrow's Visitor examined the preferences of younger, global, and faith-based travellers, while niche market studies in avitourism, geotourism, and astrotourism highlighted opportunities for innovative product diversification. Together, this body of research has strengthened SANParks' ability to anticipate and respond to shifting visitor expectations, refine marketing strategies, and broaden access to national parks – helping SANParks to remain relevant, inclusive, and competitive in a changing tourism environment.

Theme 5: Managing visitors and experiences - This theme centres on enhancing the quality and diversity of experiences that connect visitors more deeply with national parks. Research has focused on balancing access and conservation, improving visitor flow, and strengthening emotional and educational engagement. Key studies identified practical visitor management solutions for Kruger's congestion challenges, emphasising enforcement, digital tools, and expectation management. Others explored how interpretive storytelling, community inclusion, and technology can revitalise learning and heritage experiences across parks. Innovative projects such as Prompt to Pause and Mindfulness on Guided Activities demonstrated how reflection and sensory awareness can enrich visits and support well-being. This body of work puts SANParks on a path to designing meaningful, memorable, and sustainable visitor experiences that align operational effectiveness with emotional engagement and long-term destination appeal.

Theme 6: Operational efficiency - highlights SANParks' commitment to aligning internal systems, staff capacity, and service delivery to enhance the visitor experience. Research has examined how efficiency extends beyond operational processes to include the emotional and relational aspects of service quality. A key study on the "ideal visitor experience" revealed that perceptions of value, emotional connection, and attachment strongly shape satisfaction and loyalty. These insights inform staff training and visitor engagement practices, reinforcing the importance of empathy, communication, and conservation storytelling in everyday operations. Operational excellence can be achieved when streamlined systems, skilled personnel, and emotionally intelligent service intersect - helping SANParks remain both efficient and visitor-centred in its approach to protected area management.

Together, these themes demonstrate that SANParks' research programme is not an academic exercise but a strategic instrument for adaptive management, policy innovation, and long-term destination stewardship.



Photo: Agulhas National Park taken by Rudolph de Girardier

3. INSIGHTS IN ACTION: A SELECTION OF IMPACTFUL RESEARCH STUDIES

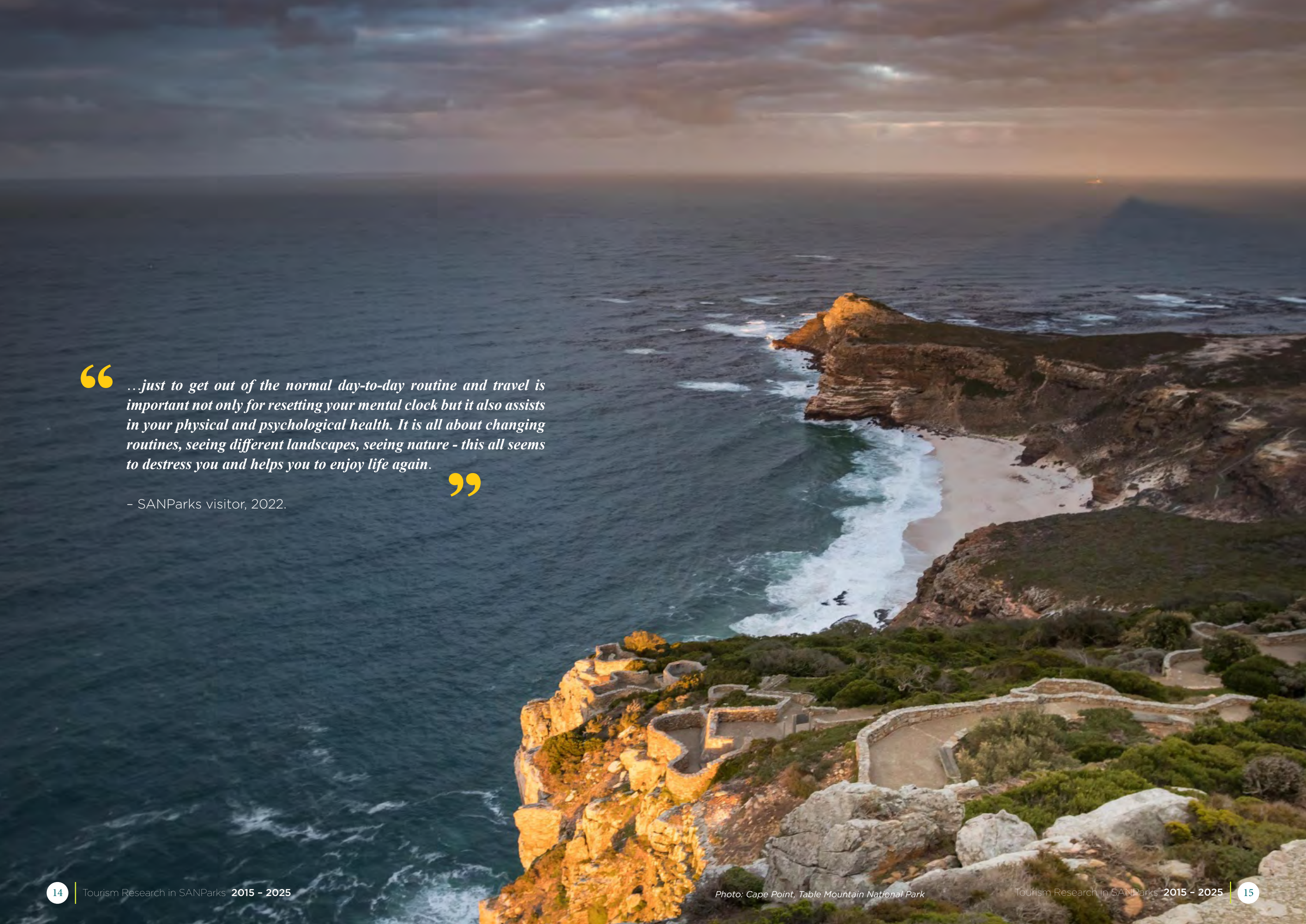
Building on this foundation, the following sections highlight a selection of research projects aligned with the six research themes outlined above. While not an exhaustive account of all tourism-related research conducted in SANParks over the past decade, this report aims to showcase a broad spectrum of studies that illustrate the tangible ways in which research can inform policy and practice, enhance visitor experiences, support community benefits, and advance environmental sustainability. Each study represents a different facet of SANParks' learning journey - showcasing how data, experimentation, and collaboration continue to shape decision-making and strengthen the organisation's custodianship of responsible and resilient tourism.

Note to the readers:

This publication is intended for a diverse audience of practitioners, researchers, and park visitors; accordingly, the abstracts are written in clear, accessible, and non-academic language. Some contributions are drawn from unpublished studies, grey literature, or internal SANParks research reports. For published research, most abstracts also include SANParks-specific management implications that were not part of the authors' original work. To ensure clarity and proper attribution, each abstract provides a recommended citation for this report, and where a related journal article or thesis or dissertation exists, an additional "Further reading" reference is included.



Photo: Cape Point, Table Mountain National Park



“ *...just to get out of the normal day-to-day routine and travel is important not only for resetting your mental clock but it also assists in your physical and psychological health. It is all about changing routines, seeing different landscapes, seeing nature - this all seems to destress you and helps you to enjoy life again.* ”

- SANParks visitor, 2022.

Theme 1:

RESILIENT AND ADAPTABLE TOURISM

Photo: Camdeboo National Park taken by Rudolph de Girardier



ONGOING MONITORING OF TOURISM MARKET CONDITIONS AND TRENDS

Researcher: Liandi Slabbert, SANParks.

Introduction

Ongoing monitoring of economic and tourism market conditions is essential for strategic planning and decision-making in the tourism sector. This research provides insights into global and local economic trends, analysing factors such as inflation, consumer confidence, and fiscal conditions that influence consumer and travel behaviour. Additionally, international and domestic tourism performance is continuously assessed, focusing on visitor arrivals, spending patterns, and demand for different tourism products. The findings help identify emerging market opportunities, risks, and challenges, enabling SANParks to adapt their strategies, pricing models, and marketing efforts to align with shifting economic, consumer and travel dynamics.

Methods

- Market trends and economic outlook: Analysis of global and local economic conditions, including factors such as GDP growth, inflation, interest rates, consumer confidence and other macroeconomic indicators. Additionally, the geopolitical climate is closely monitored, as these factors influence the cost of travel, travel restrictions, and global mobility, all which impact tourism demand.
- Tourism performance and migration data: Reports from Stats SA, UNWTO, IATA, and SA Tourism track international and domestic arrivals, spending behaviours, air travel performance, and visitor demographics to assess the sector's recovery and growth.
- Consumer and travel trends: Insights from international tourism and consumer behaviour reports and surveys highlight changing consumer behaviour and visitor preferences, generational preferences, demand for sustainability, and emerging travel trends that influence tourism decisions.

Key findings from a recent report

- Geopolitical tensions, high debt, and uneven fiscal conditions remain major risks. These factors could impact travel confidence, cost of travel, and long-haul decisions.
- Despite ongoing uncertainties, international tourism has remained resilient, reaching 4% above pre-pandemic levels by the end of 2025. South Africa continued a gradual but steady year-on-year recovery in international arrivals
- Several airlines are expanding or extending Cape Town routes, cementing the Cape as South Africa's strongest long-haul gateway and creating opportunities for Cape-anchored itineraries linking to Kruger, Addo Elephant, and the Garden Route.
- Locally, consumer confidence remains weak with rising living costs dampening discretionary spending and leisure travel. After robust growth in 2023 and 2024, domestic overnight tourism has stabilised in 2025. Holiday travel has declined in both volume and expenditure, reflecting tighter economic conditions, with travellers opting for fewer but longer stays.
- Consumer travel behaviour is evolving, with increased demand for meaningful, value-driven, and tech-integrated experiences. South Africans increasingly seek wellness, cultural heritage, and nature-based travel, often favouring "slow travel" and off-the-grid experiences.
- The rise of AI trip planners, social media "micro-influencers," and instant-payment systems is reshaping booking behaviour.



Management Implications

To remain competitive and responsive in an increasingly dynamic tourism environment, SANParks must continue strengthening its data-driven decision-making processes. Ongoing monitoring of visitor statistics, travel trends, and market conditions enables timely responses to changes in demand and helps inform operational, marketing, and pricing strategies.

Given the rapidly evolving global travel landscape, continuous research into international market shifts should remain a strategic priority. By deepening its understanding of changing traveller motivations, preferences, and barriers in key source markets, SANParks can respond more effectively to global uncertainties while identifying emerging opportunities in new or recovering markets.

SANParks is also well-positioned to promote wellness and reflective experiences in nature. National parks can serve as spaces for healing, mindfulness, and emotional restoration by integrating experiences such as guided meditation, wellness retreats, and interpretive prompts that encourage reflection and connection with nature. These offerings not only enhance visitors' well-being but also reinforce the distinctive value of the national park experience.

On the domestic front, targeted engagement strategies are essential to sustain visitation amid economic pressures. Campaigns that encourage "backyard exploration" - including regional promotions, discounts, and value-for-money packages - can stimulate local travel and maintain steady visitation even during periods of financial strain.

To meet the growing desire for authenticity, SANParks should curate immersive and culturally rich tourism experiences. Collaborations with local communities can bring storytelling, indigenous heritage, and traditional knowledge to life through themed packages and guided experiences, fostering both authenticity and local economic participation.

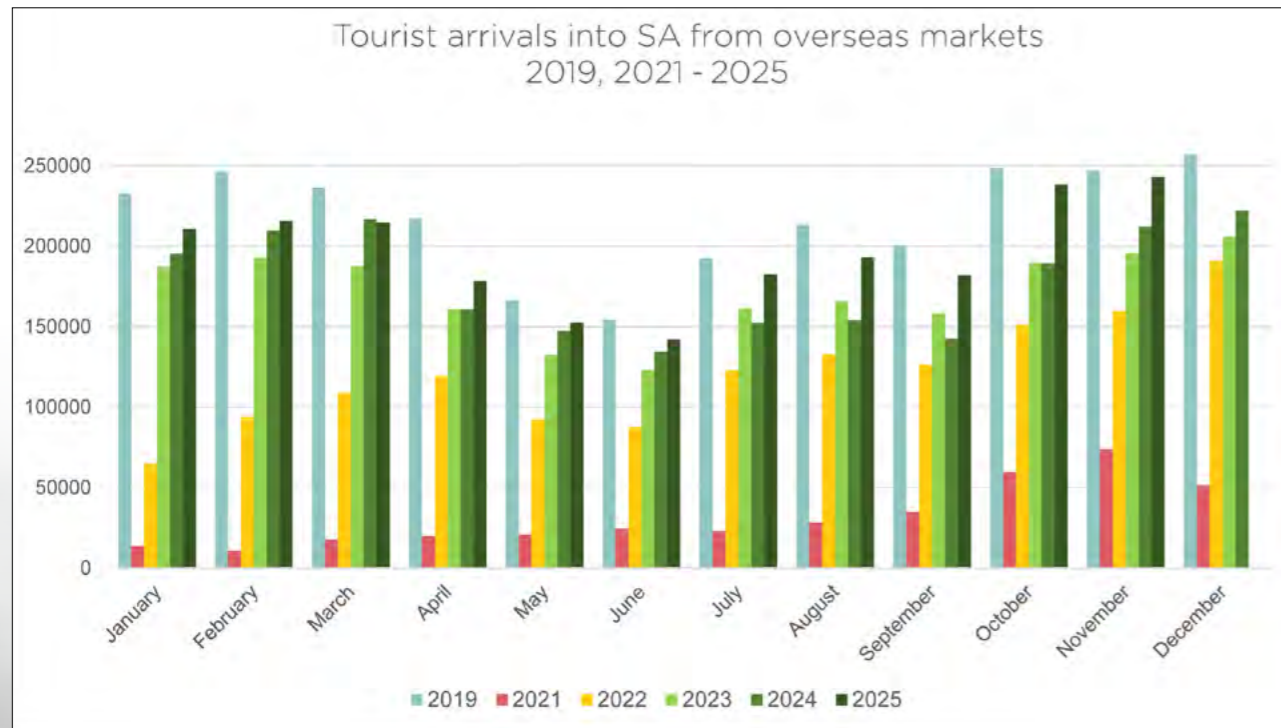
Embracing technology-driven innovation will further enhance the visitor experience. Digital maps, mobile audio guides, virtual reality tools, and AI-enabled personalised itineraries can modernise the park experience, appeal to tech-savvy audiences, and improve navigation, interpretation, and accessibility across diverse visitor segments.

Affordability remains crucial in a price-sensitive market. Loyalty rewards, discounted packages, and careful management of price adjustments will help maintain the parks' reputation as an affordable holiday choice, particularly for domestic travellers.

Finally, SANParks can expand its reach by developing active ecotourism and blended travel opportunities. Experiences that allow visitors to participate in conservation work or community projects create purpose-driven engagement, while designated co-working spaces in select parks cater to the growing "bleisure" (referring to the practice of combining a business trip with personal leisure activities) and remote-working markets. Together, these innovations ensure SANParks remains relevant, inclusive, and aligned with future travel trends.

This structured approach ensures that SANParks' tourism management strategies remain data-driven and responsive to both economic shifts and evolving traveller needs.

Recommended citation: Slabbert, L. (2026). Ongoing monitoring of tourism market conditions and trends. In A Decade of Learning: Tourism Research in SANParks (2015-2025) (pp. 18-20). South African National Parks.



TRACKING VISITOR TRAVEL BEHAVIOUR IN UNCERTAIN TIMES

Researchers: Liandi Slabbert & Izak Smit, SANParks

Background to the Travel Behaviour Study

To better understand the long-term effects of the pandemic on visitor patterns, it is important to first consider the findings of SANParks' Travel Intentions Study (2020), which laid the foundation for the Travel Behaviour Study.

The COVID-19 pandemic had a profound impact on global travel, including visitation to SANParks. Recognising the need to understand how visitor behaviour would be affected, SANParks launched the Travel Intentions Study in April 2020 during the lockdown period. This study aimed to assess visitor sentiment, their willingness to travel post-lockdown, and the barriers preventing travel.

Findings from the 6 668 responses in the 2020 Travel Intentions Study indicated that most visitors chose to postpone rather than cancel their planned trips, particularly domestic travellers. The study also highlighted the deep emotional connection that visitors have with national parks, with many respondents expressing a sense of loss and frustration at being unable to visit. In terms of travel concerns, safety and affordability played a major role in decision-making. While visitors did not generally perceive national parks as high-risk environments for contracting COVID-19, there was considerable anxiety about air travel, sanitation practices at accommodation facilities, and the financial impact of the pandemic. International visitors cited concerns about flight availability, affordability, and potential quarantine measures upon arrival or return. Domestic visitors, on the other hand, were more worried about economic constraints, job security, and limited leave days post-lockdown.

The overwhelming desire to return to nature, coupled with economic constraints, triggered noticeable shifts in travel behaviour. Visitors indicated in the 2020 Travel Intentions Study a preference for remote destinations with fewer crowds (45%), an increased interest in camping as a more affordable and socially distanced accommodation option (37%), and a stronger inclination to travel by car rather than fly (36%). These trends highlight the need for a deeper, long-term study to assess how travel behaviour would continue to evolve as the world adjusted to post-pandemic realities.

The post-pandemic period has been marked by significant economic and geopolitical instability, coupled with escalating living costs – forces that have collectively transformed how people travel and what they value when they do. Considering this, and the results from the Travel Intention Study that was conducted during COVID-19, a need was identified to monitor these travel changes and their underlying drivers over several years, which can help SANParks determine whether the changed travel behaviour from the COVID-19 period was transient; or whether the trend is likely to persist and form part of a permanently altered visitor behaviour.

Methods

Preliminary work involved the analysis of available data from SANParks tourism systems as part of an ongoing investigation into changes in travel behaviour and buying patterns. A comparison of SANParks' tourism and reservation data from a pre-pandemic year (October 2018–September 2019) and a mid-pandemic year (October 2020–September 2021) revealed several notable shifts in visitor behaviour. The period October 2020 to September 2021 was one of gradual reopening but unstable recovery for travel to South Africa. International borders technically reopened in late 2020, yet travel remained highly constrained as several events disrupted the recovery's momentum, including new COVID-19 variants, bans from key foreign markets, regional travel restrictions and civil unrest in July 2021.



Photo: Bontebok National Park taken by Rudolph de Girardier

When comparing visitation by domestic guests before and mid-pandemic, most parks recorded an increase in the number of overnight guest entries – that is, the total count of overnight stays made by domestic visitors (whether camping or staying in fixed accommodation). Camping unit occupancy improved substantially in the year 2021. In most parks, the average length of stay increased. International visitors are known for shorter stays as they often have a long itinerary of destinations and attractions on a single trip. It is, therefore, accepted that the absence of the international segment from the visitor profile in the early phase of the recovery period would influence the length of stay statistics.

Building on these findings, along with that of the initial Travel Intentions study, SANParks launched a more comprehensive Travel Behaviour Study in 2022, when travel restrictions were lifted in most countries (except in Asia). This study used a quantitative research approach, employing an online survey targeting visitors who had booked accommodation at SANParks over the preceding five years (2018–2022). The sample included domestic and international visitors, with 3 092 fully completed responses collected between June and July 2022.

The survey investigated:

- Shifts in visitor attitudes towards nature, travel, and national parks.
- Evolving travel behaviour and destination choices and changing patterns in park-specific travel.
- Impact of national park visits on well-being.
- Future travel outlook and influencing factors including anticipated travel behaviour, financial constraints, and ongoing concerns affecting future trip planning.

Who responded?

A total of 3 430 respondents participated in the survey, representing visitors with varying levels of engagement with SANParks. The largest share of participants (43%) were regular visitors who travel to parks once or twice a year, while 29% visited three or more times annually and 25% visited every couple of years. Only a small minority had either visited a park once prior to the pandemic (2%) or began visiting for the first time during the pandemic (1%). As expected, most respondents were South Africans (87%), mainly from Gauteng (43%) and the Western Cape (26%). The 13% of international respondents were primarily from traditional overseas markets – the United Kingdom (25%), Germany (18%), and the Netherlands (12%) – with smaller representations from the United States, Australia, Switzerland, France, and Canada. The sample was dominated by older visitors, with 77% aged 55 years or older, and men (63%) were more prevalent, likely reflecting booking patterns in older households.

In terms of park preferences, the Kruger National Park was by far the most visited (89%), followed by Kgalagadi Transfrontier Park (36%) and Addo Elephant National Park (35%). Other popular parks included Karoo, Au-grabies Falls, West Coast, Garden Route, Golden Gate Highlands, and Mountain Zebra National Parks, all collectively visited by roughly a quarter of respondents. The sample was also diverse in accommodation choices: 79% used fixed accommodation, 44% made use of camping facilities, and 18% occasionally entered as day visitors with many visitors alternating between accommodation types. This blend of loyal, repeat visitors with flexible travel styles and cross-park engagement reflects a mature, experience-driven visitor base that remains deeply connected to SANParks.

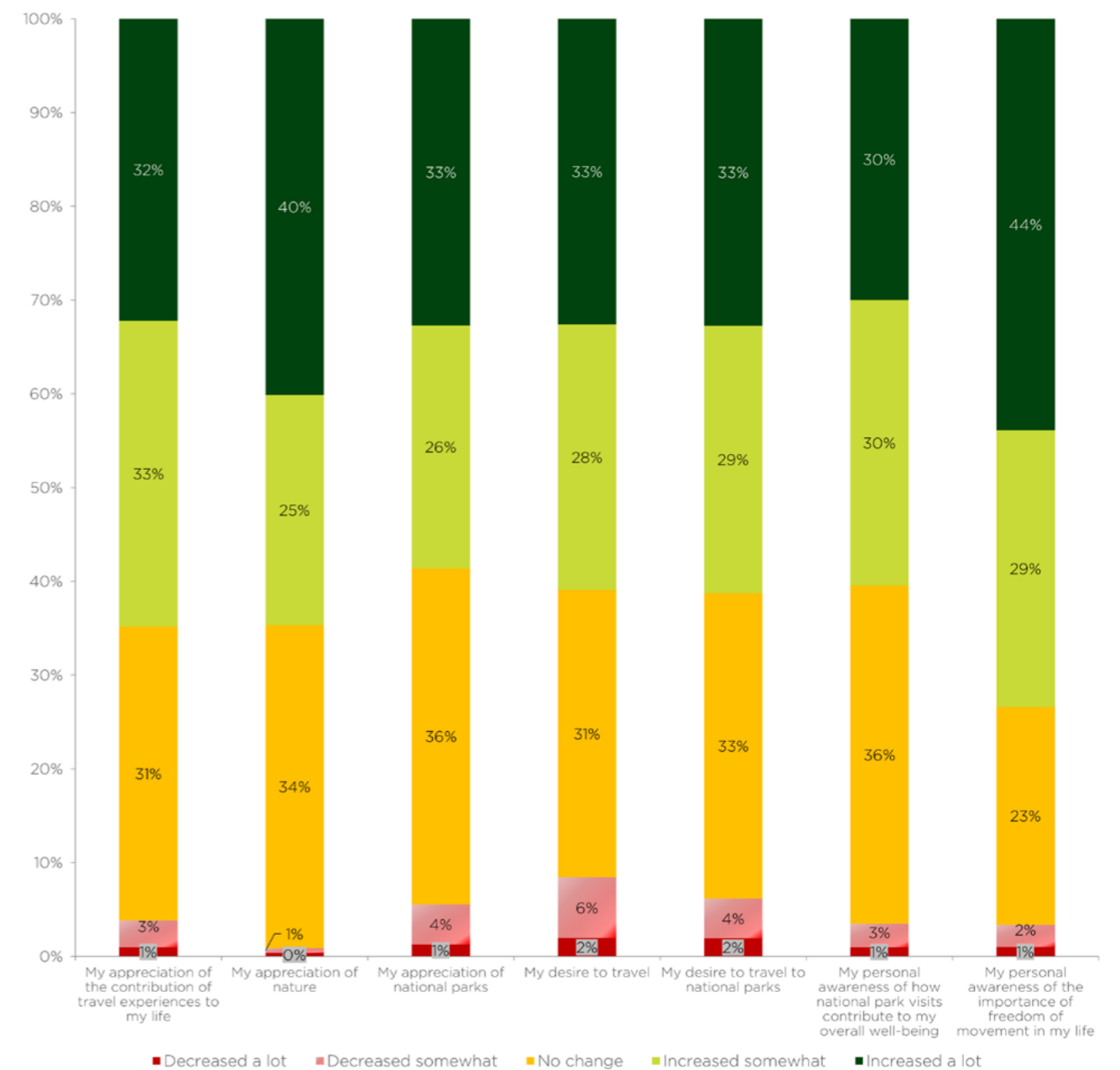
Key findings

Respondents reflected on how their attitudes and behaviour changed during the two-year period (August 2020 and June 2022) compared to before the pandemic, revealing several key shifts in visitor behaviour, including:

Increased appreciation for nature and national parks

The study found that visitors developed a stronger emotional connection to nature and national parks during the pandemic. 40% of respondents reported a significant increase in their appreciation for nature, and many saw national park visits as essential for mental well-being. This highlights the growing importance of nature-based tourism in stress relief and personal fulfilment.

How have the following aspects changed in your life in the past two years (if at all)? (n=3430)



Budget conscious travel behaviour

Economic uncertainty and rising living costs have made visitors more price-sensitive when planning trips. 80% of respondents indicated that financial considerations have become more important, with many actively seeking affordable accommodation options and shifting their travel patterns to off-peak periods, when rates are lower. This suggests a trend toward value-for-money tourism offerings.

Longer but fewer trips

While some visitors reduced their overall number of trips, those who did travel tended to stay longer in one place. This behaviour was particularly evident among campers, who extended their stays to make trips more cost-effective. The trend suggests that travellers are prioritising immersive experiences over frequent short getaways.

Shift in park preferences

Visitors showed a strong preference for familiar destinations, with 53% choosing to revisit their favourite national parks. A smaller but notable segment (18%) opted for less crowded parks, reflecting a broader trend toward socially distanced and remote travel experiences. This shift indicates a need for parks to balance accessibility with conservation and crowd management.

Growth in camping

The study revealed an increase in the popularity of camping during the two-year period, compared to pre-pandemic times, driven by both economic and experiential factors. Camping offered a more affordable alternative to fixed accommodation, particularly as visitors became more budget conscious. Additionally, it aligned with a growing preference for self-sufficiency, open spaces, and nature immersion, making it an attractive option for post-pandemic travel. The study further highlights the heterogeneous nature of national park visitors' accommodation preferences, with a significant degree of flexibility in accommodation choices. This trend is particularly evident among camping guests, as only 39% use camping facilities exclusively, while the majority (44%) alternate between camping and fixed accommodation. Additionally, 12% switch between all three options - camping, fixed accommodation, and day visits - while 5% combine camping with day visits.

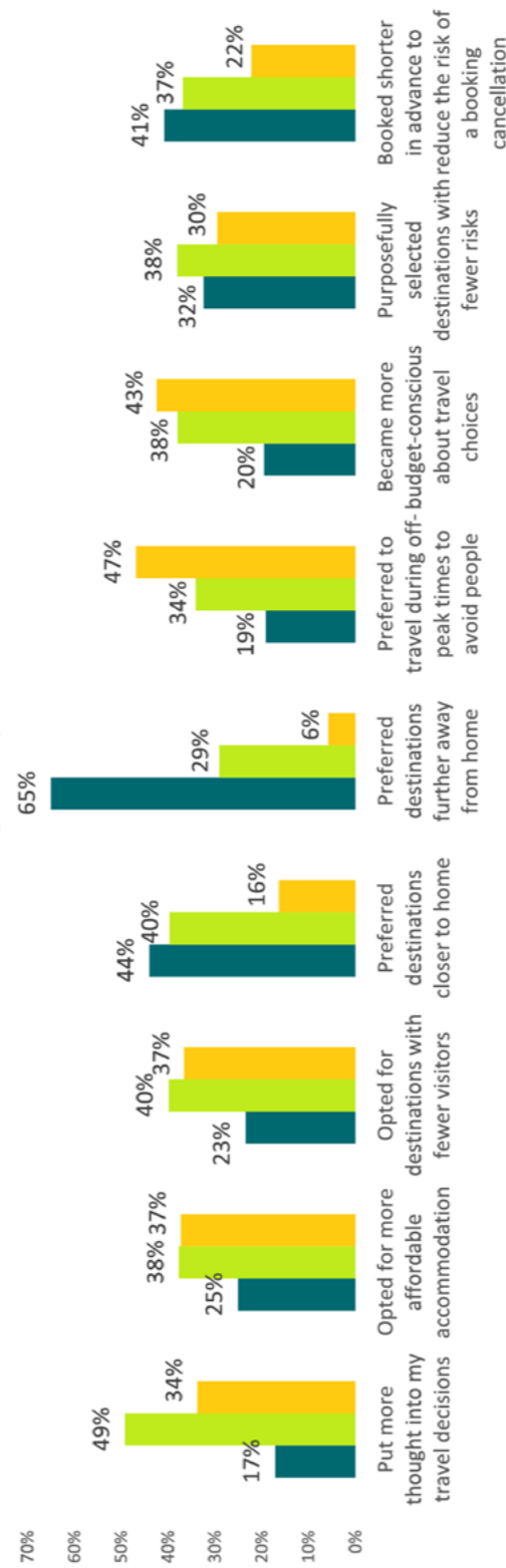
Financial pressures limiting travel opportunities

Rising fuel prices, inflation, and personal financial strain significantly impacted travel behaviour, with 27% of visitors reducing the number of overnight trips they took during the two-year period compared to pre-pandemic times. Some visitors opted to combine trips and extend their stays to mitigate travel costs, while others postponed visits entirely.

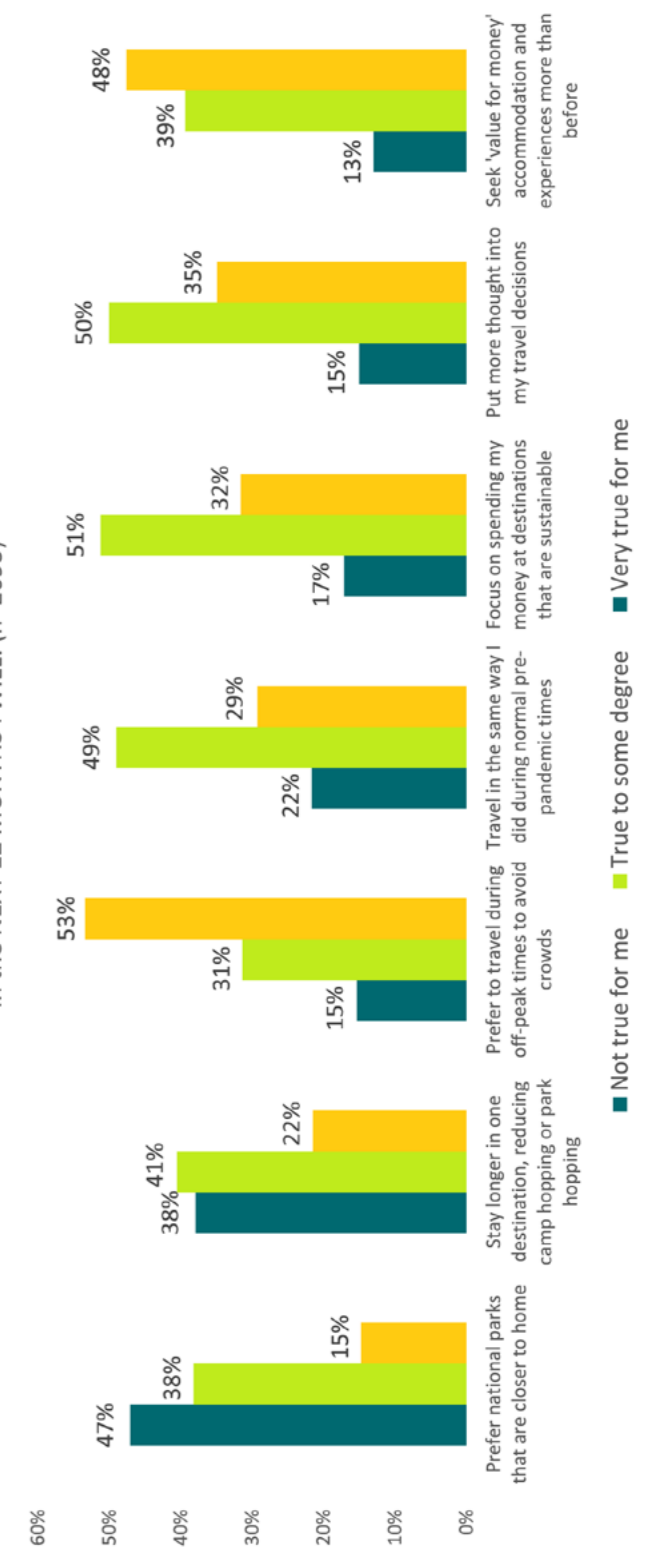
Future travel concerns and behaviour adjustments

Many respondents indicated they expected financial pressures to continue affecting their travel plans in the coming 12 months. 23% believed their ability to visit national parks would be negatively impacted, while 53% planned to travel during off-peak seasons to manage costs. These findings suggest a need for adaptive marketing strategies that cater to budget-conscious visitors while encouraging continued engagement with SANParks.

In what ways did your travel behaviour change in the last 2 years compared to pre-pandemic times (n=3137)



Which of the following statements do you think will be true for you in the next year? In the NEXT 12 MONTHS I WILL: (n=2095)



Management implications

While affordability and changing visitor expectations are reshaping travel choices, a strong sense of loyalty and emotional connection to national parks remains evident. To safeguard this support base and stimulate growth, SANParks should focus on adaptive pricing, product diversification, market-specific strategies, and continuous insight-driven management.

Pricing, affordability, and value for money

Affordability remains the strongest influence on travel behaviour. Even loyal visitors are adjusting their habits in response to rising living costs by taking fewer trips, staying longer to save on travel expenses, and choosing camping or lower-cost accommodation. SANParks should focus on perceived value rather than competing purely on price. This includes reviewing tariff structures to align cost and quality, offering flexible pricing such as off-peak or long-stay discounts, and communicating clearly about what rates include. Diversified pricing models, including seasonal offers, loyalty rewards, and bundled multi-park packages, can maintain both affordability and revenue stability.

Product development and longer stays

The rise in camping and self-catering reflects a growing preference for autonomy, affordability, and immersion in nature. SANParks should continue to enhance camping facilities while maintaining comfort and quality in fixed accommodation to retain higher-value segments. Introducing mid-range family units, affordable couple retreats, and eco-lodges focused on wellness could broaden appeal without reducing accessibility. With more visitors choosing fewer but longer trips, extended-stay incentives, park-to-park itineraries, and “slow travel” experiences that combine recreation, learning, and restoration can help reposition parks as destinations for personal well-being rather than short getaways.

Domestic market resilience and recovery

The domestic market remains SANParks’ core strength. Communication should reinforce the health, emotional, and family benefits of visiting parks, positioning them as safe, affordable, and restorative spaces. Domestic non-visitors, particularly middle-income families, represent untapped potential. Campaigns highlighting accessibility, affordability, and ease of booking, supported by partnerships with schools, communities, and provincial tourism organisations, can help rebuild and expand this market.

Managing crowding and visitor confidence

Many visitors now travel during off-peak periods to avoid crowds and reduce perceived risks. SANParks can encourage this through targeted off-peak promotions, careful capacity management during peak seasons, and clear communication on safety and hygiene. These actions enhance visitor confidence while helping to distribute demand more evenly across parks and seasons.

Emotional connection and storytelling

Visitors’ strong emotional attachment to nature continues to define the SANParks brand. This connection can be deepened through storytelling initiatives such as visitor testimonials, digital narratives, and interpretation programmes that convey the cultural and emotional value of nature. These efforts strengthen loyalty, advocacy, and the long-term relevance of national parks.

Monitoring and adaptive management

Visitor behaviour is increasingly influenced by factors outside SANParks’ control, including economic uncertainty and global instability. Continuous monitoring is therefore essential. SANParks should embed regular behavioural and sentiment tracking to identify emerging trends early and adapt its pricing, marketing, and product strategies accordingly. Evidence-based and flexible management will be key to building resilience in an unpredictable environment.

Recommended citation: Slabbert, L. and Smit, I.P.J. (2026). Tracking visitor travel behaviour in uncertain times. In A Decade of Learning: Tourism Research in SANParks (2015–2025) (pp. 21–27). South African National Parks.

*Related internal report:
Slabbert, L. and Smit, I.P.J. (2022). Research Report: An investigation into the travel behaviour of South African national park visitors in the context of recent world events. South African National Parks.*

Photo: Valley of Desolation, Camdeboo National Park taken by Liandi Slabbert

CONTINGENCY STRATEGIES FOR NATIONAL PARKS DURING COVID-19: THE CASE OF KRUGER NATIONAL PARK

Researcher: Madeline Huyser, North-West University.

Introduction

The Kruger National Park (KNP), as the country's largest and most visited park, faced significant operational and financial difficulties during the COVID-19 pandemic. This study was conducted in 2021 to assess the contingency strategies implemented by KNP management during the pandemic to remain operational while ensuring visitor safety and satisfaction. The research also aimed to identify lessons learned that could inform future crisis management strategies in SANParks.

Methods

The study utilised a mixed-methods approach:

- **Quantitative research:** Visitor surveys were conducted across KNP's main camps (Skukuza, Satara, and Berg-en-Dal) in December 2021, using convenience sampling, resulting in 284 completed questionnaires. The survey assessed visitor satisfaction with COVID-19 protocols.
- **Qualitative research:** Semi-structured interviews were conducted with six park managers to explore contingency strategies, operational challenges, and best practices. A thematic analysis was used to extract key themes from the interviews.

Who were the visitors who participated?

The majority of KNP visitors were South African (86%), with international respondents (14%) representing countries such as Israel, Germany, Belgium, the USA, and France. The sample included a slightly higher proportion of male respondents (56%) compared to females (44%). In terms of age distribution, the largest group of visitors fell within the 30-39 age range (23%), followed by those in their 20s (17%) and 40s (16%), with an average respondent age of 46 years. Education levels were generally high, with 30% holding a bachelor's degree, 24% possessing postgraduate qualifications, and 21% with professional certifications. Employment-wise, most respondents were employed (80%), while 10% were pensioners or retirees.

The survey also revealed strong visitor loyalty, with respondents having visited the park an average of 2.7 times per year before the COVID-19 pandemic and 2.5 times per year post-pandemic, indicating a relatively stable return rate despite global travel disruptions.

Key findings

High satisfaction with COVID-19 protocols:

Visitors expressed high levels of satisfaction with the social distancing measures, use of face coverings, and hand sanitising protocols at reception, demonstrating their strong approval of the park's approach to health and safety.

Perception of the park as a safe and relaxing environment:

Visitors generally agree that national parks provide a safe and ideal holiday destination during a pandemic, largely due to their wide-open spaces and the lack of crowds. The findings suggest that visitors are willing to follow social distancing guidelines and perceive national parks as a safe option for their families. Visitors believed the health and safety measures did not negatively impact their experience. Notably, concerns about risk management before visiting the park had little impact on travel decisions, giving KNP and SANParks a competitive advantage in attracting visitors during crises.

Communication:

Visitors found the SANParks website to be an effective source of COVID-19 safety information, reinforcing the importance of digital communication tools like websites and social media in keeping the public informed.

Strong visitor loyalty and willingness to return:

Most visitors expressed a high likelihood of revisiting and recommending the park, highlighting the importance of the local market in sustaining tourism during crises like the pandemic.

Operational adjustments:

Park management introduced social distancing measures, sanitisation protocols, and digital booking systems to minimise contact. Despite these efforts, maintaining staff health and morale was a challenge.

Financial challenges:

A sharp decline in international visitors led to financial strain. Strategies such as cost-cutting, shifting focus to domestic tourism, and operational streamlining were employed to mitigate losses.

Management implications

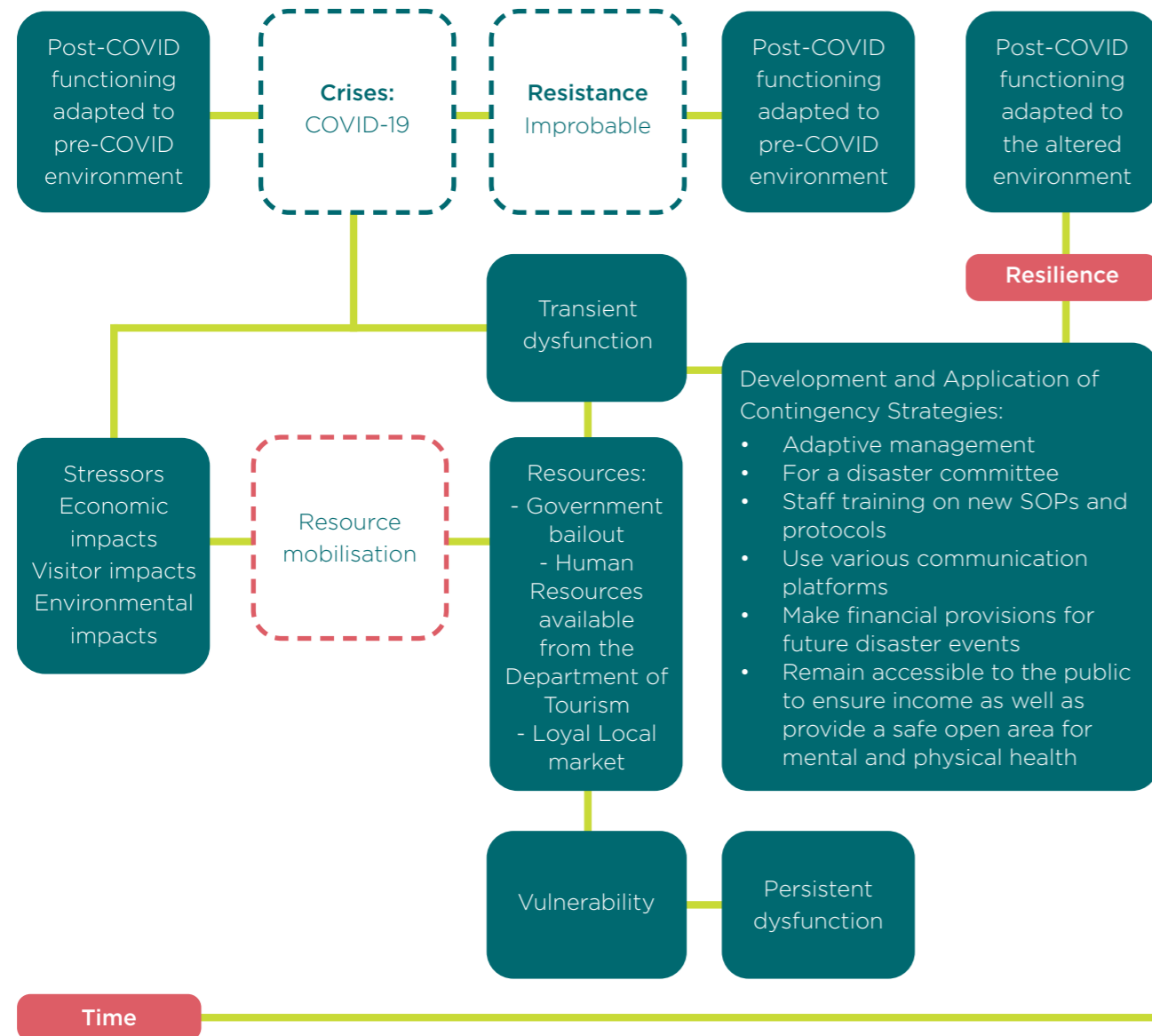
The study highlighted the importance of future preparedness, emphasising the need for proactive crisis management strategies. These include robust health protocols, operational adjustments, the establishment of a dedicated disaster response team, and the strengthening of communication channels to ensure swift and coordinated action during crises.

A further recommendation is investment in contactless services, such as digital check-in systems and mobile-based visitor information platforms, which could enhance both safety and efficiency. In addition, the findings pointed to the necessity of improving hygiene facilities, calling for additional investment in ablution blocks and sanitisation stations to meet evolving visitor expectations.

To support long-term resilience, the study highlighted the value of diversifying revenue streams. This involves reducing overreliance on international tourists by engaging the domestic market more effectively and exploring alternative income sources, including virtual tourism offerings and conservation-based experiences.

The research also noted the need for transparent and accessible cancellation policies, which play a crucial role in reducing visitor uncertainty and improving the overall booking experience.

Finally, the study proposed positioning SANParks as a crisis-ready tourism destination. By leveraging the parks' strong reputation as safe and trusted nature-based experiences, management can develop strategic crisis-response plans that reinforce SANParks as the preferred choice for visitors during future pandemics or other global disruptions. By implementing these strategies, SANParks can enhance its resilience to future crises while maintaining visitor satisfaction and financial stability.



A COVID-19 Resilience Model as Applied to National Parks' Contingency Strategies. This aligns with the concept of psychosocial consequences in the aftermath of disasters, as Norris et al. (2008) described.

Recommended citation: Huyser, M.M. (2026). Contingency strategies for national parks during COVID-19: The case of Kruger National Park. In *A Decade of Learning: Tourism Research in SANParks (2015-2025)* (pp. 28-30). South African National Parks.

Related article: Huyser, M. M., van der Merwe, P., & Ali, A. (2025). Contingency Strategies to Foster Resilience in National Parks During Crisis Events such as COVID-19. *Tourism Planning & Development*, 1-22.

PERCEPTIONS OF PROPOSED ANTI-POACHING FEES AMONG VISITORS TO RHINO PARKS

Researcher: Liandi Slabbert, SANParks.

Introduction

The steady increase in illegal wildlife trade – particularly rhino poaching – since 2007 had necessitated substantial anti-poaching measures by SANParks. These interventions had yielded a number of successes but had also driven operating costs to levels that were not financially sustainable at the time.

SANParks continued to receive financial support from government, donors, NGOs, the SANParks Honorary Rangers and the public. Ongoing funding was essential to cover the replacement, maintenance and operational costs of anti-poaching technologies and equipment, as well as additional human-capital costs.

Faced with these challenges, one option considered in 2017 was an anti-poaching fee (levy) added to the existing conservation fee for visitors to parks with rhinos. The funds would be ring-fenced under a specific project code to ensure direct application to anti-poaching initiatives. The fee was envisaged as temporary and would be removed once wildlife crime was brought under control. Acknowledging the potential impact on visitors, the SANParks Executive Committee recommended that visitor opinions on the proposed fee be formally gathered before any implementation.

Methods

The research was conducted in-house using a quantitative survey approach. The target population consisted of individuals who had visited any of the seven national parks which have rhinos, during the preceding three years. Both day visitors and overnight guests were invited via email to participate in a web-based survey. Specifically, invitations were sent to overnight visitors and to day visitors with active Wild Card memberships who had travelled to one or more of the seven parks between July 2014 and August 2017. Only customers who had previously consented to be contacted by SANParks for research purposes were approached. Data collection took place during August and early September 2017.

Who participated?

A total of 7 147 visitors participated in the online survey conducted in August of 2017. The sample included both overnight (61%) and day visitors (39%), with data collected from visitors across seven national parks with rhino populations. The Kruger National Park was the most represented park, contributing over half the responses (53%), followed by Addo Elephant (16%), Mountain Zebra (8%), and others including Marakele, Mokala, Karoo, and Mapungubwe National Parks. The majority of respondents were South African residents (91%), with strong provincial representation from Gauteng (39%) and the Western Cape (21%), followed by notable contributions from the Eastern Cape, Mpumalanga, and KwaZulu-Natal. The age profile skewed significantly older, with 62% aged 56 and above, reflecting a mature, loyal visitor base.

Key findings

Previous visitor support towards anti-poaching efforts

Visitors to the seven national parks indicated they had previously supported anti-poaching efforts in a variety of ways. The most common contributions were purchasing souvenirs (49%) and donating money (44%), indicating a strong preference for financial support through both direct donations and park-related purchases. Other forms of engagement included raising awareness on social media (22%), volunteering time (8%), and joining rhino activist groups (7%). A smaller group of respondents (2%) contributed by writing letters that were published in the media. Notably, 20% of respondents had not yet made any contribution, suggesting potential for further visitor engagement in anti-poaching initiatives.

Overall support for the anti-poaching fee

Overall, visitors across all seven parks appeared willing to financially support the anti-poaching initiative (supported by 79%). However, 60% of them indicated that their support would depend on the affordability and cost implications of the proposed fee. A fifth of participants opposed the idea entirely, with 6% stating they would consider not returning to the park if such a fee was introduced.

The results reflect a strong overall willingness among visitors to contribute financially to rhino conservation efforts, while also emphasising the need to carefully balance funding requirements with visitor sensitivity to additional costs.

Level of support	Percentage	Number of respondents
I support it fully, regardless of the cost	19%	1 378
Depends on the costs implications for me, but I support it	60%	4 297
I do not support this decision, but will still visit the Park	14%	1 029
I do not support this decision and will stop visiting the Park	6%	443

Answered: 7 147

Preferred methods of payment

Nearly half of respondents (49%) indicated a preference for the anti-poaching fee to be implemented by increasing the existing Conservation and Wild Card fees. Around 25% supported adding a percentage-based levy to booking fees, similar to the current community levies, while 20% favoured a voluntary contribution model offering predetermined donation amounts. Several respondents used the comment section to suggest a blended approach, combining compulsory fees with an optional top-up. Others recommended that SANParks first trial visible and accessible voluntary payment options at gates and camps, and evaluate their effectiveness before implementing any mandatory fees. These comments also revealed a general lack of awareness among visitors about SANParks' current donation channels, suggesting the need for improved visibility and communication around existing fundraising mechanisms.

Preferred method of payment	Percentage	Number of responses
1. Increase conservation fees and Wild Card fees	48.8%	3 106
2. As a % of a visitor's booking fees	25.0%	1 590
3. Voluntary contribution	20.4%	1 299
4. Other	2.4%	127
5. Fixed amount per visitor	1.5%	95
6. Let international visitors foot the bill	0.9%	57
7. Let government foot the bill	0.7%	42
8. Combination of methods	0.4%	25

Willingness to Pay

Most respondents indicated that a 10% increase in both the Conservation Fee and Wild Card would be acceptable, while a 5% increase was generally considered reasonable for booking fees. Among those preferring to contribute voluntarily, the majority felt that a contribution of R50 per park visit would be appropriate.

Willingness To Pay	Median, Mode and Average	Number of responses
Increase conservation fees by:	Median 10% Mode 10% Average 16.97%	3 006
Increase Wild Card fees by:	Median 10% Mode 10% Average 14.78%	3 006
Charge a % on top of accommodation booking fees	Median 5% Mode 5% Average 6.9%	1 576
How much, in South African Rands, would you be willing to contribute to anti-poaching on a single visit to the Park?	Median R50 Mode R50 Average R75.45	1 105

Management Implications

To support the successful implementation of an anti-poaching fee, integrating the fee into existing Conservation and Wild Card fees would offer visitors a clear, simplified cost structure, increasing transparency and ease of payment. In parallel, management should consider introducing voluntary top-up donation options – both at park entry points and online – allowing visitors to contribute additional funds in convenient, predefined amounts (e.g. R10, R20 or R50), which could enhance overall contributions from those willing to give more.

There is also a need to significantly improve the visibility and accessibility of SANParks' official donation channels, as many visitors remain unaware of current opportunities to support anti-poaching. To maintain public support, SANParks should commit to reviewing and potentially removing the fee once the poaching crisis is under control, reinforcing the message that this is a temporary, purpose-driven intervention.

Finally, a comprehensive communication strategy is essential to build and maintain public trust. This should include transparent messaging about how funds are managed, SANParks' commitment to fighting corruption, and regular updates on progress and achievements in anti-poaching efforts. Clear, consistent communication will be key in securing long-term visitor support and confidence in the initiative.

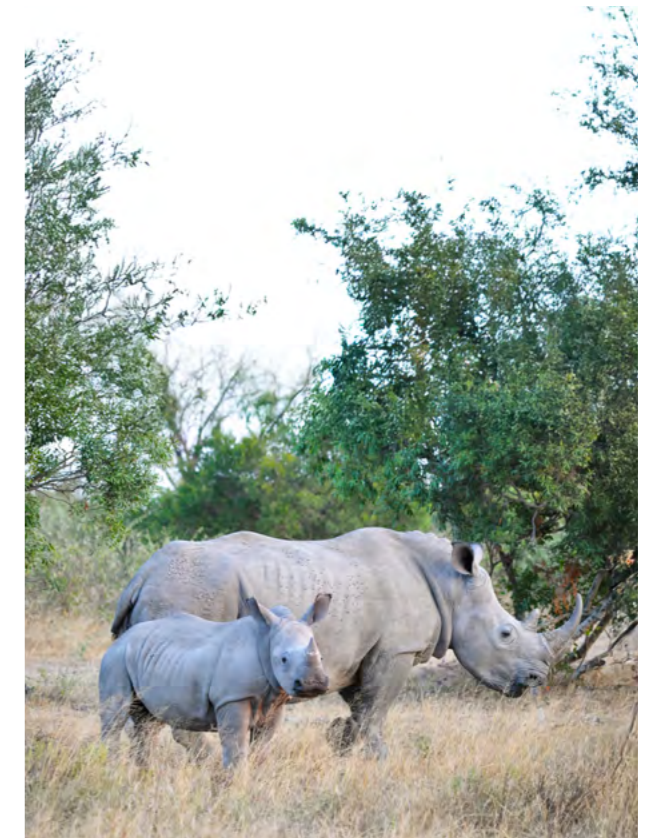


Photo: Kevin Moore

Recommended citation: Slabbert, L. (2026). Perceptions of proposed anti-poaching fees among visitors to rhino parks. In A Decade of Learning: Tourism Research in SANParks (2015-2025) (pp. 31-33). South African National Parks.

Related internal report: Slabbert, L. (2017). Research report: Perceptions of proposed anti-poaching fees among visitors to rhino parks. South African National Parks.

KRUGER THROUGH THE AGES: TOURISM'S EVOLUTION IN THE PARK

Researcher: Joep Stevens

Introduction

This study examines the century-long evolution of tourism in Kruger National Park (KNP), showing how it transformed into a primary mechanism to fund, thereby sustain, conservation. KNP's tourism model has repeatedly adapted to policy changes, external shocks and shifting societal expectations. By dividing the last century into distinct phases of governance and product development – from pioneering access to today's hybrid public-private model – it illustrates how diversification, evidence-led pricing, and continuous market monitoring have strengthened institutional resilience. The long-run visitor trend and changing revenue mix provide proof of adaptive capacity: The park anticipates, absorbs and learns from disruption, maintaining ecological integrity and visitor confidence in a dynamic environment.

Early beginnings

Since the formal inception of conservation in the Lowveld in 1898, funding the enterprise has been a central concern. By the mid-1920s, a notable shift occurred: the notion that wildlife could be enjoyed without being destroyed crystallised into early eco-tourism. When KNP was proclaimed on 31 May 1926, tourism was recognised as both recreation and as a practical means to fund conservation. This linkage has remained a defining feature of KNP's commercial model, albeit one continually reshaped by political eras, public expectations, and institutional priorities. Post-1994, for instance, national social priorities and real declines in operational grants intensified the pressure on SANParks to grow self-generated income, even as government support for land expansion and infrastructure increased.

Phases of tourism development in Kruger National Park

A historical analysis organises KNP's tourism story into five phases, each with distinct operational arrangements and market dynamics. The framework below visually anchors these decades, emphasising how governance arrangements (who runs what), infrastructure, and market composition co-evolved to produce today's diversified portfolio.

Phase	Start	End	Approximate Duration	Title and brief characteristics of phase / era
1	1923	1930	4 years	Early pioneering years characterised by trial and error
2	1930	1945	15 years	Several small operators were appointed to run all commercial activities (retail and food) while simultaneously checking in overnight guests
3	1946	1955	11 years	After World War II, when volumes increased, a single operator, called Kruger Park Services, was appointed for all camps. They managed shops, restaurants, filling stations and garages, while SANParks managed the camps.
4	1955	2001	45 years	A fundamental and very significant policy change took place in 1955 when SANParks decided to operate all commercial activities in-house.
5	2001	2025	24 years	SANParks continues to operate the bulk of rest camps and outsources non-core commercial activities, such as shops and restaurants, and put out opportunities for full-service lodges with exclusive traversing in seven locations across the Park. A variety of several other commercial opportunities are identified and awarded to successful bidders during this phase.

Phase 1 – Pioneering (to 1930)

A short, experimental period of trial and error as officials, visitors, and early service providers tested the fundamentals: How to move, host, and provision people in a vast, remote landscape. Facilities were rudimentary; access and supply chains were uncertain. Yet the core proposition formed: conservation, funded in part by tourism.

Phase 2 – Multi-operator outsourcing (1930–1945)

SANParks appointed several small operators to run retail and food services and to check in overnight guests. This distributed model extended reach quickly, but with uneven standards and coordination costs. Still, visitor routines took shape and repeat use began to grow.

Phase 3 – Single-operator consolidation (1946–1955)

Rising post-war demand prompted a single commercial operator (Kruger Park Services) to run shops, restaurants, fuel, and garages, while SANParks retained camp management. The consolidation improved consistency and service reliability across camps and roads.

Phase 4 – In-house era (1955–2001)

A fundamental policy shift in 1955 brought most commercial activities in-house. For nearly half a century, SANParks operated the commercial engine itself, building a system of self-catering rest camps intertwined with nature-based mobility (self-drive, picnics, hides, loops). The model cemented KNP's identity as affordable wilderness access at scale, while achieving financial stability through volume and operational control.

Phase 5 – The hybrid model (2001–present)

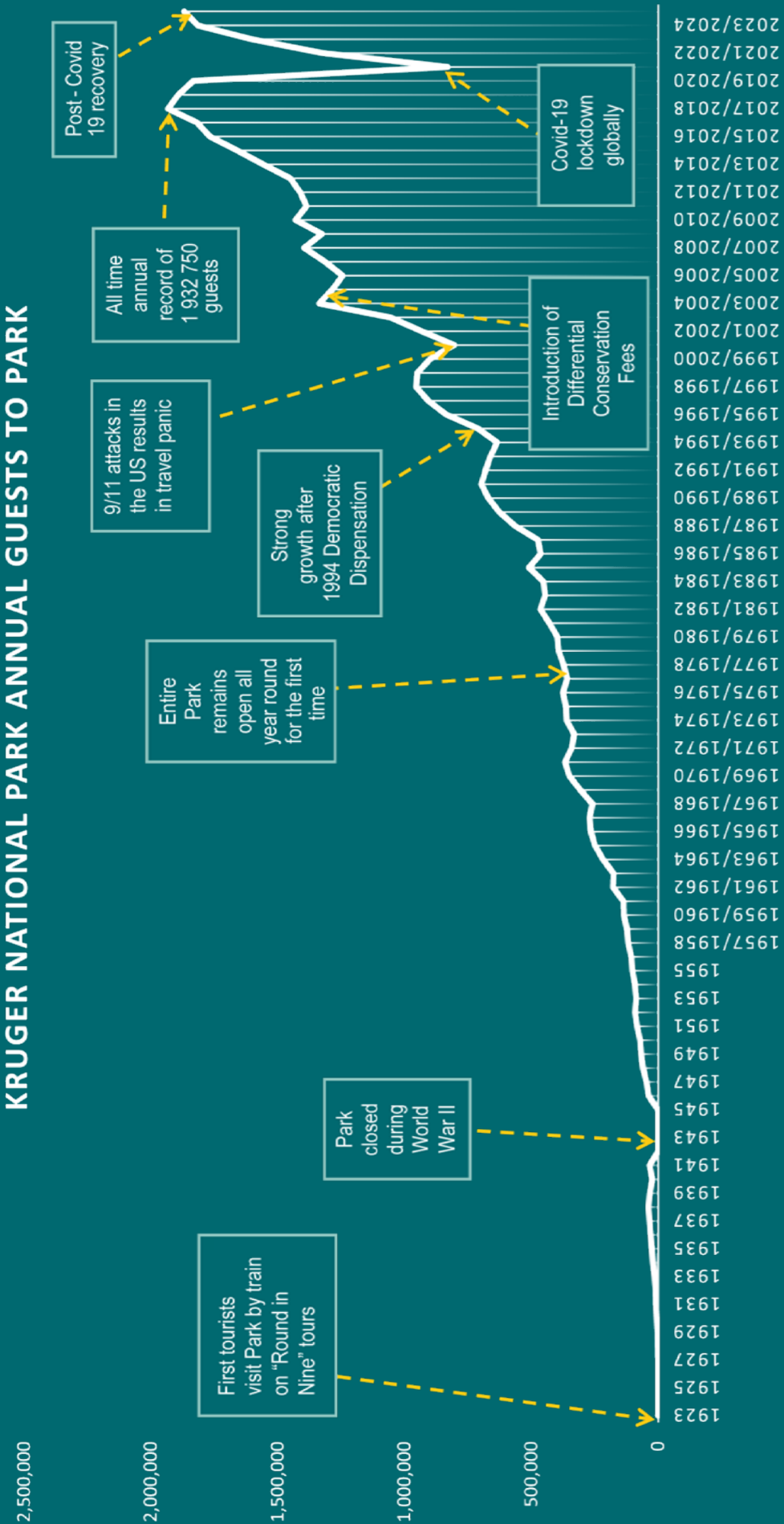
From 2001, KNP retained its core rest-camp business in-house, but outsourced non-core services (shops, restaurants, selected experiences) and introduced full-service private lodges on concession areas with exclusive traversing. Today's model is a hybrid: SANParks focuses on its strengths in protected-area hospitality, access, and core products, while the private sector provides capital, innovation, and premium market reach. A small subset of facilities runs on management agreements with limited capital exposure for operators. The result is a broader, tiered product ladder that serves domestic and international markets without diluting conservation integrity.

Visitor growth through the decades

The long-run visitation curve tells a story of thresholds and inflection points: early, modest growth under difficult logistics; a post-war surge as roads, vehicles, and national leisure habits expanded; steady self-drive tourism booms during the in-house era; post-1994 diversification as domestic markets broadened; and, more recently, the sharp COVID-19 trough followed by a resilient rebound.

These turning points align with the phases above: Access improvements and consistent camp services lifted volumes in the mid-century; the in-house era locked in affordability and reliability; and the hybrid era added premium layers without abandoning the democratic access that underpins Kruger's social licence.

KRUGER NATIONAL PARK ANNUAL GUESTS TO PARK



Evolution of Tourism Business Model and Commercialisation

Phase 1

1923-1926

Pre-proclamation years

Phase 2

1926-1930

Early pioneering years

Phase 3

1930-1945

Several small operators appointed - retail, food, fuel and camp administration

Phase 4

1945-1955

Single outsourced operator "Kruger Park services" retail, food & fuel

Phase 5

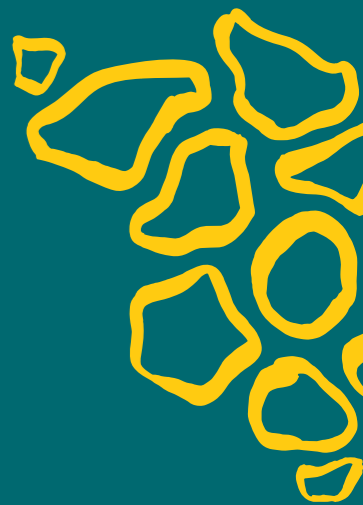
1955-2001

Fundamental change and all commercial activities are operated in house by SANParks, including vehicle fleet, building construction and maintenance. Game activities, such as Wilderness trails (1978), drives, walks and bush braais (1995) are introduced.

Phase 6

2001-2025

Hybrid model with SANParks operating rest camps, gates and fuel. Start operating in the five star plus concession lodges through PPP's. Outsource non-core activities such as retail, food, building construction, vehicle fleet, etc. Introduce several other PPP's e.g. airport, health spa, golf course, etc. several community-owned lodges open to the public.



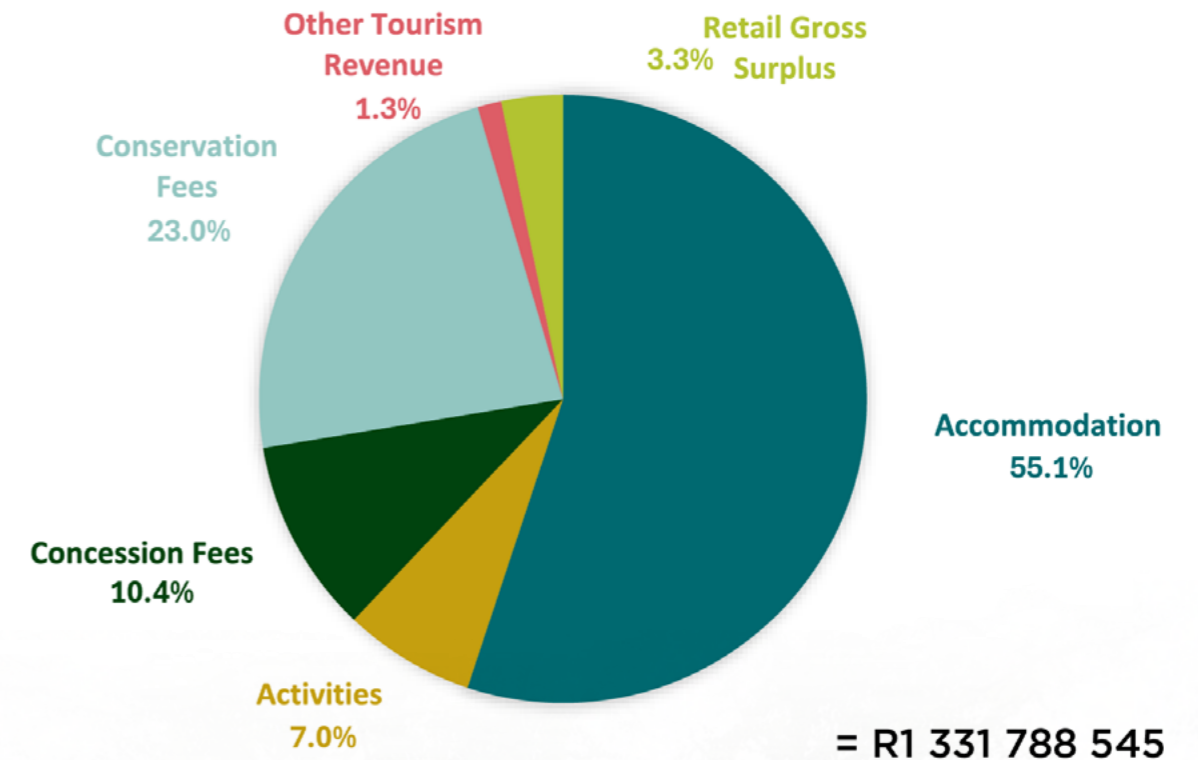
Revenue composition: From accommodation-led to diversified

The modern revenue, witnessed through a comparison of tourism revenue composition in 2001/02 with that of 2024/25, story has four strands:

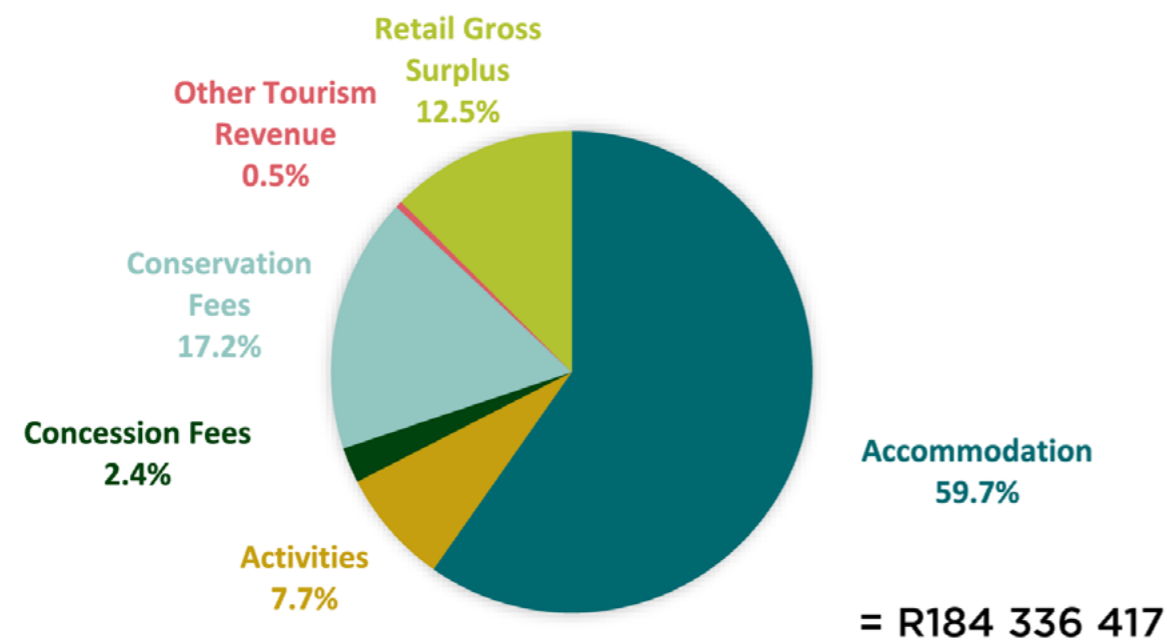
1. Accommodation remains the cornerstone. Bed- and unit-based income is the model's backbone, reflecting Kruger's unique self-catering culture and loyalty base. Accommodation grew about 6.7 times in nominal terms (R110.1m → R733.8m), however, it is sensitive to maintenance cycles and capacity constraints and now forms part of a broader, more balanced mix of tourism revenue.
2. Conservation fees (incl. Wild Card) have grown in weight and strategic role. Conservation income rose roughly 9.7 times (R31.6m → R306.8m) and increased its weight from -17.1% to -23.0% of tourism revenue, reflecting maturing tariffs, Wild Card value, and the rebound in international visitation.
3. Concessions and facilities rental broaden and stabilise. Concession fees increased about 31 times (R4.4m → R137.9m), with their share increasing from 2.4% to 10.4%, suggesting that the hybrid model and PPPs now make a material, stabilising contribution alongside core in-house offerings.
4. Activities and retail are smaller revenue lines, but they make a meaningful contribution by diversifying income. Activities track visitation cycles and product packaging; retail gross profit provides steady contribution, largely via fuel and shops. Activities scaled 6.5 times (R14.3m → R93.0m) while holding a 7-8% share, closely tracking visitation and packaging. Retail gross surplus grew 1.9 times in rand terms (R23.1m → R43.5m) but its mix share fell from 12.5% to 3.3%, consistent with outsourcing dynamics that shift retail turnover off SANParks' books while still supporting visitor experience.

Together, these shifts show a clear evolution from an accommodation-led income profile to a diversified portfolio where conservation fees and PPP-linked concession income carry increasing weight — hallmarks of a resilient hybrid era.

TOURISM REVENUE COMPOSITION FOR 2024/25



TOURISM REVENUE COMPOSITION FOR 2001/2



Comparison of tourism revenue composition, 2001/02 vs 2024/25

KNP's century-long commercial journey demonstrates an organisation able to anticipate, absorb, and adapt: anticipating by aligning policy and partnerships with fiscal reality (e.g., the 1999 commercialisation strategy); absorbing shocks through a diversified revenue base and a strong domestic core; and adapting products, prices and access to maintain ecological integrity and visitor confidence. The hybrid model is not an end state but a capability – a way of structuring roles, capital, and risk so that the park can continue to fund conservation while expanding inclusion and safeguarding the experience that makes Kruger National Park a world-class wildlife destination.

Recommended citation: Stevens, J. (2026). *Kruger through the ages: Tourism's evolution in the park. In A Decade of Learning: Tourism Research in SANParks (2015-2025) (pp. 34-39). South African National Parks.*



Photo: Shingwedzi rest camp, Kruger National Park taken by Joep Stevens

Theme 2:

THE VALUE OF TOURISM IN PARKS TO SOCIETY

Photo: Garden Route National Park taken by JP van Niekerk

INTANGIBLE BENEFITS OF VISITING NATIONAL PARKS

Researcher: Nellie de Crom, Tshwane University of Technology.

Introduction

Understanding the intangible benefits of visiting national parks has become increasingly important in demonstrating their broader value to society beyond biodiversity conservation and economic returns. This study, conducted over a number of years, explored how visitors experience and articulate non-material benefits such as peace, awe, humility, spiritual enrichment, and self-reflection. By focusing on nine national parks across South Africa, the research sought to capture both the shared and park-specific dimensions of these intangible experiences.

Methods

A qualitative, interpretivist approach was used, combining semi-structured questionnaires, participant narratives, and visual data (photographs). Data were thematically analysed to identify recurring patterns in visitor experiences, supported by direct quotations to highlight depth and authenticity. The study framework drew on concepts of virtues and values of nature, recognising that intangible benefits often emerge through sensory awareness, emotional reflection, and meaning-making in park settings.

Studies were conducted in Agulhas, Augrabies Falls, Bontebok, Camdeboo, Golden Gate Highlands, Mapungubwe, Marakele, Mokala National Parks and Kgalagadi Transfrontier Park. Findings from these parks help to refine understanding and broaden the applicability of the research to different park environments and visitor groups.

Key findings

Shared intangible benefits across parks

Across all nine parks, visitors consistently described heightened sensory awareness – noticing the sounds of birds, the smell of soil after rain, the textures of rock formations, or the silence of vast landscapes. These sensory encounters deepened into mindfulness and reflection, with visitors slowing down and “being in the moment”.

Visitors also expressed strong affective and spiritual responses, including awe, humility, gratitude, and connection to creation. Experiences were often described as transformative, offering peace, renewal, and perspective on life:

“It was a very humbling moment... I realised how small and vulnerable we are on this earth”
(Golden Gate Highlands NP visitor).

Many linked encounters to personal metaphors, such as survival in harsh conditions (Kgalagadi) or resilience in the face of ageing (Augrabies quiver trees).

Analysis of visitor narratives reflected all six virtues (wisdom, courage, humanity, justice, temperance, transcendence) and eight values of nature (solitude, oneness, primitiveness, timelessness, humility, care, self-knowledge, spirituality). For example, visitors described courage in overcoming fears on mountain trails (Golden Gate Highlands), humility in feeling insignificant beneath vast skies (Camdeboo), compassion for drought-stricken animals (Marakele), and transcendence through gratitude and spirituality (Mokala, Mapungubwe).

Park-specific highlights

While the benefits were shared, each park revealed unique emphases:

Agulhas

symbolism of the southern tip and humility in standing where two oceans meet.

Augrabies Falls

multi-sensory immersion in the waterfall and various landscapes; resilience symbolised by dying quiver trees.

Bontebok

tranquillity, family bonding, and intimacy with small-scale features like fynbos and birdlife.

Camdeboo

awe of dramatic landscapes in the Valley of Desolation, with mystical qualities.

Golden Gate

grandeur of sandstone cliffs and mountains, inspiring life metaphors and spirituality.

Kgalagadi

silence, stars, remoteness, and survival metaphors in the harsh desert environment.

Mapungubwe

blending wilderness with cultural heritage, baobabs and heritage sites evoking humility and timelessness.

Marakele

close wildlife encounters (especially elephants and vultures), emotional connections, and lasting happiness effects.

Mokala

peace, opportunities for close observation of wildlife without the presence of predators, gratitude, and a sense of belonging.

These diverse emphases highlight the depth and variety of intangible benefits that parks provide, ranging from symbolic meaning and cultural heritage to sensory immersion, reflection, and spirituality.





The 'vastness' experienced by a participant visiting the Valley of Desolation in Camdeboo National Park is described as 'mystical' and a metaphor of what he would like his life to be.

“

**It was a very humbling moment...
I realised how small and vulnerable
we are on this earth**

”

(Golden Gate Highlands NP visitor).



Photographs of visitors in Augrabies Falls National Park, experiencing times of solitude, peace and quiet described as 'spiritually uplifting'.



Flowering aloes seen as "a special sighting" by participants visiting Bontebok National Park.



A spider web and flowers photographed by a participant in Bontebok National Park regarded as "something significant" to stop at.



Colours displayed on the Brandwag at GGHNP at different times of the day regarded as spiritually inspiring.

Management implications

This study highlights the significance of intangible, non-material benefits as a central part of the value that national parks provide to society. Protecting and enhancing these benefits requires a management approach that extends beyond infrastructure and wildlife conservation to also nurture the conditions that foster peace, reflection, and meaning-making. Parks such as Kgalagadi and Mapungubwe illustrate the importance of safeguarding silence, remoteness, and solitude, while others emphasise the symbolic or cultural dimensions of place, such as the southern tip at Agulhas or the heritage sites at Mapungubwe.

Creating opportunities for visitors to pause, reflect, and engage their senses can be supported through unobtrusive interventions such as interpretive markers, quiet zones, and mindfulness prompts at key sites including viewpoints, hides, and camps. Equally important is the protection of features that visitors describe as spiritually or emotionally significant – from quiver trees and camelthorn groves to vulture colonies and river confluences.

The findings also underscore the role of parks in strengthening social bonds. Experiences of family togetherness, storytelling around campfires, and group reflection emerged as integral to wellbeing, suggesting that park management should continue to support inclusive and accessible facilities that encourage shared experiences. Finally, intangible benefits should be more explicitly integrated into how parks are presented to the public, ensuring that marketing and interpretation capture not only the wildlife and scenic qualities of parks, but also the peace, humility, and sense of renewal that they foster.

By recognising these dimensions, SANParks can position itself not only as a custodian of biodiversity, but also as a steward of human wellbeing, cultural connection, and spiritual enrichment.

Building on the insights from De Crom's initial study on the intangible benefits of visiting national parks, new research opportunities emerged, including a PhD study and two mini-projects. These projects serve as direct extensions of the original research, further exploring and refining this important topic.



Recommended citation: De Crom, E.P. (2026). Intangible benefits of visiting national parks. In A Decade of Learning: Tourism Research in SANParks (2015-2025) (pp. 42-46). South African National Parks.

PhD study by Ms ME Brand

A PhD study expands on ongoing research into the intangible benefits of visiting national parks, aiming to quantify these experiences and develop a practical tool for protected area managers. Using a mixed-methods approach, the study explores how visitors connect with nature, ensuring parks are managed not only for biodiversity conservation but also to enhance psychological and emotional well-being.



“ *Freedom of movement and just being in the bush is good for the soul. It is a great family holiday, relaxing and spending quality time with the kids away from all distractions (devices, work, etc.)* ”

– SANParks visitor, 2022.

STUDY OVERVIEW: NATIONAL PARKS AS PLACES OF PSYCHOLOGICAL HEALING DURING THE COVID-19 PANDEMIC

Researcher: Liandi Slabbert, SANParks.

During the COVID-19 period, many South Africans turned to protected areas for respite, reflection and a sense of normality. This project considered how visits to South African National Parks related to facets of visitor well-being, and how time in nature may have intersected with experiences of restoration, emotional regulation, self-directed travel and social connection. The intention is to situate national parks not only as recreational assets but also as places that can support psychological resilience in times of personal or societal disruption.

Context and rationale

Previous research suggests that access to nature is associated with benefits such as stress relief, attentional reset and opportunities for perspective-taking. At the same time, the pandemic altered everyday routines, constrained mobility and limited many traditional coping behaviours. Within this context, South African National Parks offered distinctive settings where visitors could engage with nature through self-directed experiences. The project seeks to understand how such engagements relate to dimensions of well-being that matter for individuals, families and communities, and how these relationships might inform future visitor services and access strategies.

Broad approach

Using a single open-ended prompt administered across the parks system through an online questionnaire distributed in 2022, we gathered nearly 2 000 visitor narratives. Through structured thematic coding, these accounts were distilled into high-level indicators that support broad, comparative reporting. We explore how visitors describe time in nature and make meaning from landscapes and wildlife, particularly around restoration, autonomy and appreciation of place, and we consider how these narratives relate to perceived opportunities for psychological and physical benefit and to visitor stewardship. The forthcoming peer-reviewed article will set out the analytical approach in full and examine nuances, limitations and alternative explanations.

Intended contribution

By bringing together visitor perspectives from across the parks system, the project aims to contribute an integrated view of how nature-based experiences may support well-being, and how management can balance these benefits with protected area mandates. The manuscript will consider practical implications for inclusive access and the provision of opportunities for contemplation alongside other forms of recreation. It will also reflect on how lessons from the pandemic period might inform resilient approaches to access during future disruptions.

Editorial note

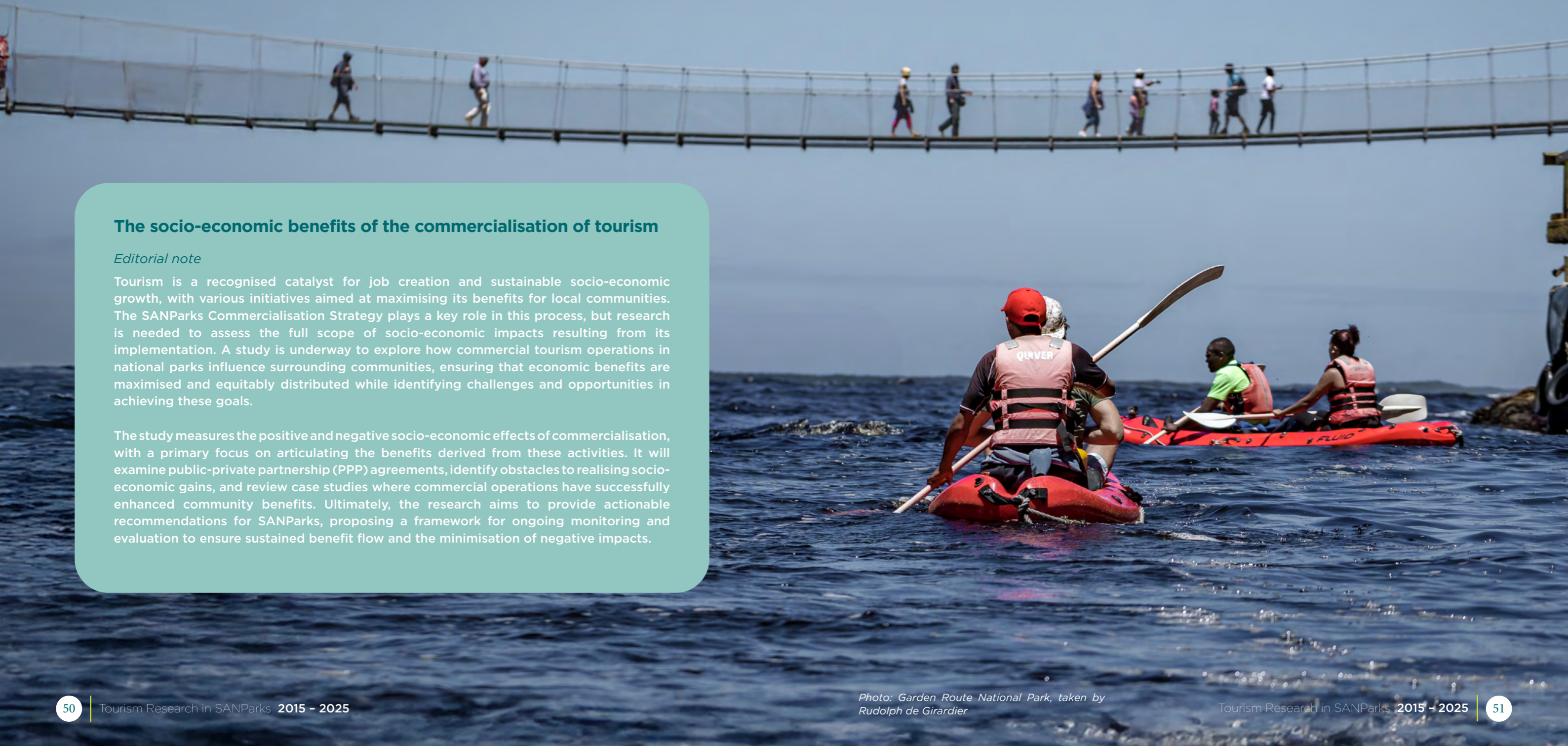
This synopsis is a non-technical overview. It does not disclose original results, numerical data, quotations or figures, and it should not be cited as a scientific publication. Full methodology, analyses and findings will appear in a forthcoming peer-reviewed article, which will also discuss limitations and management implications in detail.

The socio-economic benefits of the commercialisation of tourism

Editorial note

Tourism is a recognised catalyst for job creation and sustainable socio-economic growth, with various initiatives aimed at maximising its benefits for local communities. The SANParks Commercialisation Strategy plays a key role in this process, but research is needed to assess the full scope of socio-economic impacts resulting from its implementation. A study is underway to explore how commercial tourism operations in national parks influence surrounding communities, ensuring that economic benefits are maximised and equitably distributed while identifying challenges and opportunities in achieving these goals.

The study measures the positive and negative socio-economic effects of commercialisation, with a primary focus on articulating the benefits derived from these activities. It will examine public-private partnership (PPP) agreements, identify obstacles to realising socio-economic gains, and review case studies where commercial operations have successfully enhanced community benefits. Ultimately, the research aims to provide actionable recommendations for SANParks, proposing a framework for ongoing monitoring and evaluation to ensure sustained benefit flow and the minimisation of negative impacts.





Theme 3:

RESPONSIBLE AND REGENERATIVE TOURISM AND ENVIRONMENTAL CHALLENGES

Photo of Wilderness beach, Garden Route National Park, taken by Rudolph de Girardier

VISITOR PARTICIPATION IN DEVIANT LEISURE PRACTICES IN A SOUTH AFRICAN NATIONAL PARK

Researchers: Michael Kuseni and Uwe Hermann, Tshwane University of Technology.

Kruger National Park (KNP) is one of South Africa’s most visited protected areas, attracting millions of visitors annually. While tourism contributes significantly to conservation funding and economic sustainability, it also poses challenges in maintaining responsible visitor behaviour. The study investigated the extent to which visitors at Kruger National Park (KNP) engage in deviant leisure practices (DLPs), behaviours that violate established codes of conduct, and the underlying causes of such actions. With tourism growing globally, particularly in protected areas, this research highlights a concerning issue for park managers tasked with balancing conservation efforts and visitor experiences.

Using a quantitative approach, the study surveyed 237 visitors to KNP in 2024. The findings reveal a significant degree of non-compliance with the park’s rules, with a predominant participation in practices such as getting close to wild animals to take pictures (92%), driving off-road to see animals (71%), failing to adhere to speed limits (65%) and not using water responsibly while in the park (65%). The study identifies that the primary motivations behind these deviant behaviours include the desire to create memorable experiences, being in “holiday mode,” and the perceived lack of enforcement of park rules. Interestingly, behaviours such as littering and bringing prohibited items into the park were less common, suggesting that some DLPs are more ingrained in visitor habits or perceived as less harmful.

By highlighting the widespread nature of DLPs at KNP, the study showed the importance of developing effective management strategies to safeguard the park’s resources and ensure sustainable tourism practices.

Reasons for Participating in Deviant Leisure	Most Frequent Reasons	Moderate Reasons	Least Frequent Reasons
I drove above the speed limit because ...	To make time for the gate closing time (at the camp or park gates).	An emergency is out of control.	There was no law enforcement around so I wouldn't be caught.
I used water unsparingly at the KNP because ...	Lack of water-saving mechanism available.	I was not aware of the importance of conserving water.	I am generally not mindful of such practices while on holiday.
I fed animals at KNP because ...	Food does not harm animals.	I felt personally obliged to feed animals as I feed them at home.	Most people around me were feeding them.
I got close to wild animals because ...	I wanted to create memorable experiences.	I was in the 'holiday mode' and not mindful.	I have an emotional affinity or proximity towards them.
I stopped in the middle of the road and climbed out of the car sunroof because...	I wanted to see the animal clearly and at close range.	Circumstances are out of control (it is hot at KNP, so fresh air is needed).	I am used to my old habit of climbing out of my car sunroof.
I missed gate closing time because ...	I was hoping to find more animals.	I got stuck in traffic at a wildlife sighting.	I was lost while driving in the park.
I used electricity unsparingly because ...	A few gadgets in the park save electricity.	I am used to my old habit of not saving electricity.	I had paid for it when I paid for this trip; hence, I was using my money.
I littered because ...	There were few refuse bins in the areas I visited.	There is no incentive for not littering at KNP.	I have negative emotions about animals.
I got into an overcrowded area and made a loud noise because ...	My friends and family members were making loud noises.	It was because of circumstances out of my control.	It is pleasant to be overcrowded and make noise while on holidays.



Recommended citation: Kuseni, M., & Hermann, U.P. (2026). Visitor participation in deviant leisure practices in a South African national park. In A Decade of Learning: Tourism Research in SANParks (2015–2025) (pp. 54–55). South African National Parks.

Related articles: Kuseni, M., & Hermann, U.P. (2025). Visitor Participation in Deviant Leisure Practices in a South African National Park. Tourism and Hospitality, 6(2), 53. <https://doi.org/10.3390/tourhosp6020053>

Kuseni, M & Hermann, U.P. 2025. An investigation of perceived situational factors influencing responsible tourist consumption behaviours in the Kruger National Park, Environmental and Sustainability Indicators, 28(2025). <https://doi.org/10.1016/j.indic.2025.100931>

Photo: A glamping event in the Kruger National Park taken by Izak Smit

SHOWER WATER USAGE IN KRUGER NATIONAL PARK TOURIST ACCOMMODATION:

Effectiveness of technology and information intervention to reduce use

Researchers: Izak Smit (SANParks), Nico P.J. de Bruyn (University of Pretoria).

Introduction


Water scarcity is a growing global challenge, with tourism contributing significantly to freshwater consumption. In nature-based tourism destinations like Kruger National Park (KNP), encouraging the responsible use of water by visitors is essential for two main reasons. Firstly, to maintain sustainability of resource use while accommodating high visitor numbers, and secondly, to use park visits as opportunities to inspire visitors to adopt resource-conserving behaviours, even after returning home. The study aimed to assess the effectiveness of two interventions – a behavioural information campaign (infographics) and a novel water-saving shower technology (Triton Xerophyte®) – in reducing water usage in tourist accommodation units. The infographics aimed to use simple, yet unconventional, information to stimulate water saving behaviour, whilst the Triton Xerophyte® aimed to reduce shower water usage mainly by featuring an electronically controlled mixer that recirculates water until warm water is available and only then released from the showerhead (i.e. no wasting water down drain until shower reaches optimal temperature). The research sought to determine the potential of these interventions to minimise water waste, promote sustainable visitor behaviour, and enhance conservation efforts.




Methods

The study employed a nine-month experimental trial at KNP's Skukuza rest camp between November 2020 and August 2021, involving ten identical tourist chalets divided into four treatment groups: control (no intervention), infographics-only, technology-only, and a combination of both interventions. Water meters and smart monitoring systems were installed in all chalets to measure total shower duration, total water volume, and flow rate per each individual shower event. Additionally, external factors such as ambient temperature were recorded to assess their impact on water usage and effectiveness of the interventions.

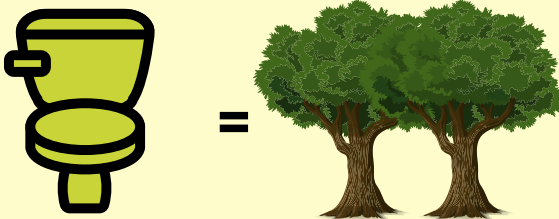
USE WATER MEASUREDLY





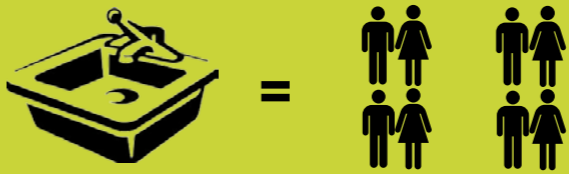
1 MINUTE SHOWER = 8 LITRES WATER

For every minute you shower shorter, you save enough water for 2 impalas for a day



1 TOILET FLUSH = 10 LITRES WATER


Every toilet flush equates to water for 2 average knobthorn trees per day - only flush when necessary



FILLED SINK = 16 LITRES WATER

Fill half a sink and wash many items together rather than few at a time, saving up to 8 litres of drinking water for people dependent on the river

USE WATER TO SHOW YOU CARE FOR THOSE WITH WHOM YOU SHARE



MEET THE SABIE WHEN YOU OPEN YOUR TAP



The water in this unit is purified water from the Sabie River

FEARFUL RIVER



Sabie comes from "Ulusaba" (Tsonga), meaning "fearful river" - apt considering the many crocodiles and hippos that have called the river home for centuries. The Sabie runs for 110 km within Kruger. The Sabie is the only river in Kruger that has never dried up, even though it almost did in September 1992 when it slowed to a mere trickle. February 2000 the river experienced its biggest recorded flood with 7 million liters/second (enough to fill 3 Olympic pools every second) - what a fearful sight!

SABIE RIVER WATER FACTORY



Although a large proportion of the Sabie river and its catchment is protected within Kruger, only 1% of the water comes from run-off within the park. The mountains to the west of Kruger supply 80% of the flow. It is therefore critical that this water factory is well looked after and that all users living within the river catchment area take good care of it. Kruger continuously exchanges information with its neighbours as looking after the river is a collective effort and a joint responsibility.

A RIVER FOR ALL....



The Sabie river is widely regarded as the most biodiverse river in the country. 300 crocodiles, 800 hippos, 49 families of "gaggattjies" (water insects) and more than 30 fish species inhabit the river. Biodiversity survey results are among the highest in the country. Furthermore, 750 000 people live in the Sabie river catchment and are dependent on the river for survival one way or another.

....ALSO FOR YOU



During your stay in Skukuza, the Sabie will also be at your service. The refreshing water you drink from the taps in this unit is kindly gifted by this river. Each minute you shower you extract about 10 litres of water out of the Sabie; each toilet flush is another 10 litres. The plants, animals and humans living in or around the river share the wonderfully clean and cool waters of the Sabie, but request you to use it responsibly.

BE MINDFUL AND ACT RESPECTFUL AS YOU ENJOY THE GENEROSITY OF THE SABIE

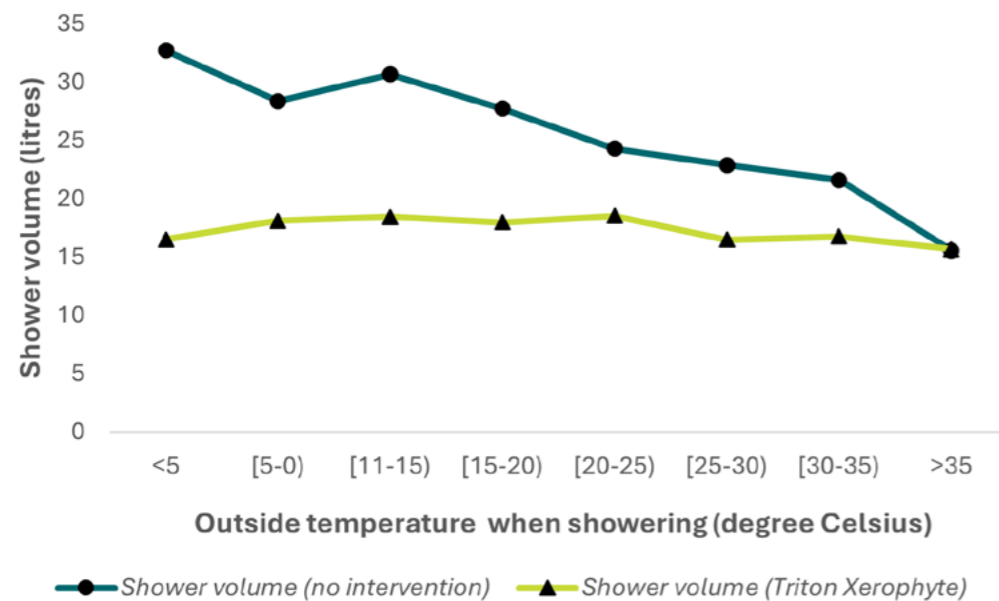


Infographics encouraging visitors to save water during their stay in Kruger National Park. The message is framed to be context-specific to the park, rather than relying on generic wording such as "Please use water sparingly" or "Water is Africa's most precious resource."

Key Findings

- The tested technology intervention, the Triton Xerophyte® - a newly patented water-saving digital shower, led to an average 30% reduction in water use, proving to be the most effective intervention.
- Infographics posters alone had limited success, slightly reducing shower duration but unexpectedly increasing total water consumption due to varying flow rates.
- The combination of both interventions yielded the highest efficiency, cutting water use by 32%.
- Visitors tended to take longer and more water-intensive showers in colder ambient temperatures, but the Triton Xerophyte® mitigated this effect, maintaining consistent water savings. Under cooler ambient conditions, the water saving potential of the Triton Xerophyte increased, with up to 50% reduction in water usage during cold conditions (<5°C).

Comparisons with external studies indicated that KNP visitors already used significantly less water and showered significantly shorter than the general public, suggesting a higher baseline awareness of conservation.



Shower water usage of visitors increased significantly during cold weather due to wasting water down the drain while waiting for water to heat up. This wasting of water was reduced with the Triton Xerophyte, which ensured no water is released from showerhead until the water in the shower mixer has reached the required temperature, saving up to 50% water at cold temperatures.

Management Implications

The findings highlight the importance of integrating technology-driven solutions in conservation areas to enhance resource efficiency. While education-based interventions can complement these efforts, they may require refinement to be fully effective. The Triton Xerophyte® technology presents an opportunity for scaling water conservation efforts, particularly in cold-climate locations or facilities with long water distribution systems. Park management should consider incremental investment in water-saving infrastructure and explore potential corporate sponsorship to fund large-scale implementations. Additionally, conservation messaging should be strengthened to further influence visitor behaviour beyond the park, fostering broader water-conscious practices.

Recommended citation: Smit, I.P.J. and de Bruyn, P.J.N. (2026). Shower water usage in Kruger National Park tourist accommodation: Effectiveness of technology and information intervention to reduce use. In A Decade of Learning: Tourism Research in SANParks (2015-2025) (pp. 56-58). South African National Parks.

Related article: Smit, I.P.J. and de Bruyn, P.J.N., 2022. Shower water usage in Kruger National Park tourist accommodation: effectiveness of technology and information intervention to reduce use. Environmental Science: Water Research & Technology, 8(7), pp.1497-1506.

EVALUATING THE ROLE OF ENVIRONMENTAL CONTROL OFFICERS IN RESPONSIBLE TOURISM AT KRUGER NATIONAL PARK

Researcher: Audrey Kekana, North-West University.

Sustainable development is essential for balancing environmental protection, economic growth, and social well-being. In South Africa, regulatory measures such as responsible tourism principles (SANS 1162) and Environmental Impact Assessments (EIAs) under the National Environmental Management Act (NEMA) aim to minimise environmental harm. To align with these principles, SANParks introduced private concessions within Kruger National Park (KNP) in 2001, ensuring that tourism developments bring social and economic benefits while maintaining environmental responsibility. Independent Environmental Control Officers (ECOs) were appointed to monitor compliance with EIA follow-ups at these private concessions, yet their effectiveness in ensuring sustainability remained unclear.

This study, conducted during the period 2018 – 2020, assessed the role and impact of ECOs in promoting responsible tourism in KNP. A literature review explored the role of EIA follow-ups, while structured interviews with SANParks personnel and concession staff provided insights into the perceived effectiveness of ECOs. The findings indicate that ECOs play a valuable role in ensuring compliance through bi-annual audits and monitoring activities, reinforcing responsible tourism principles. However, the study was limited to KNP-specific mandates, and further research is needed to evaluate ECOs' effectiveness in broader tourism contexts. It is recommended that future EIA follow-ups incorporate economic, social, and environmental dimensions to fully achieve sustainable development objectives.

An Environmental Control Officer together with a team of SANParks staff are required to conduct bi-annual audits and inspections in the concessions in order to assess compliance. The following pictures from Figures 1 to 4 are but some of the evidence provided during the audit process:

Recommended citation: Kekana, M.A. (2026). Evaluating the role of Environmental Control Officers in responsible tourism at Kruger National Park. In A Decade of Learning: Tourism Research in SANParks (2015-2025) (pp. 59-60). South African National Parks.

Related dissertation: Kekana, M.A., 2021. The value of independent Environmental Control Officers in responsible tourism: a Kruger National Park perspective (North-West University, South Africa). Available at: <https://dspace.nwu.ac.za/handle/10394/37879>



Fuel storage area bunded at Singita Lebombo.



Official records of a concession including off road driving register, rifle register, rangers' qualifications and the procedure on dealing with concession rifles.

Grey water reticulation installed, and grey water used for car wash, watering of gardens etc.



Wastewater treatment plant at Imbali Safari Lodge



Waste cages at Singita Lebombo

KRUGER NATIONAL PARK VISITORS' WILLINGNESS TO SWITCH FROM SINGLE-USE PLASTIC BOTTLED WATER TO ALTERNATIVES

Researchers: Liandi Slabbert and Kevin Moore, SANParks

Introduction

As global concern grows over the environmental impact of single-use plastics, bottled water has come under increasing scrutiny for its significant ecological footprint, largely due to the use of polyethylene terephthalate (PET) and the high energy demands of its production and distribution. In 2018, South Africa reportedly recycled over 2.3 billion PET bottles, equivalent to around 519,370 tons, highlighting high consumption and waste generation levels. These facts raised questions about the promotion of bottled water, particularly in environmentally sensitive areas such as national parks. Despite SANParks' commitment to responsible tourism, large volumes of bottled water continue to be sold in park shops, highlighting a potential contradiction in sustainability practice.

This exploratory study aimed to investigate visitor perceptions, behaviours, and awareness related to single use bottled water in South African national parks. It sought to understand why visitors consume bottled water, their average daily usage, and where they typically source it. The study also explored visitors' recycling habits, their perceptions of recycling infrastructure within parks, and their willingness to switch to more sustainable alternatives, such as multi-use containers. By gathering these insights, the research aimed to inform future policy and practice aligned with SANParks' environmental values.

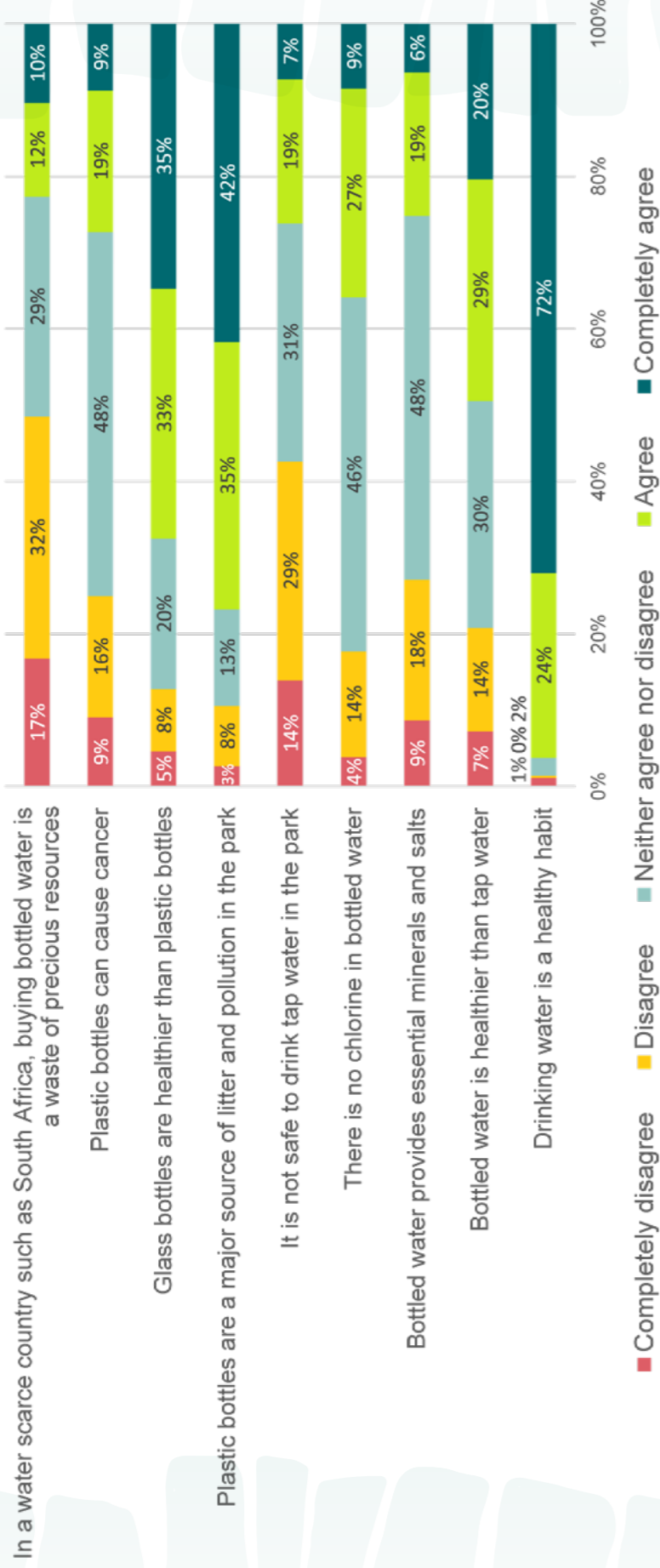
Methods

The study followed a survey research strategy, targeting both overnight and day visitors to Kruger National Park who had visited within the preceding 12 months. A link to an online survey was distributed to visitors via email during the period August 2017 to April 2018. More than 3300 responses were received.

Who responded?

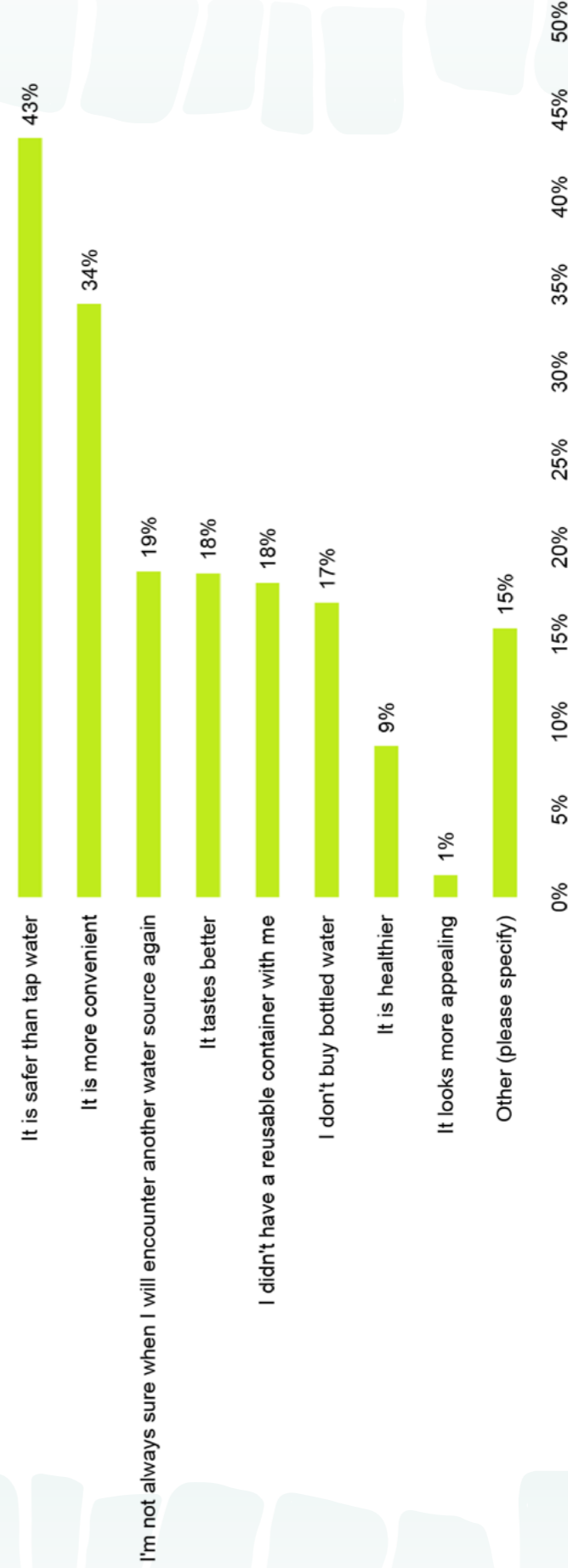
Most respondents reported travelling in small groups, with over half (54.5% usually visiting with one or two companions, 36.9% with three to five people, 6% with larger groups of more than five, and only 2.6% typically travelling alone. Most participants were married (80%), and the sample was slightly male-skewed, with 58% male and 42% female. The overwhelming majority of respondents (92%) were South African residents, with notable international representation from countries like Germany and France. Among the South African respondents, the largest share (49%) came from Gauteng, followed by smaller proportions from the Western Cape, Mpumalanga, and KwaZulu-Natal. The age distribution was skewed towards older visitors, with the highest representation among those aged 56 and above, reflecting a more mature and likely returning visitor base.

Level of agreement on perceptions about bottled and tap water (n=3281)



Perceptions about bottled and tap water (% of respondents)

Why do you buy single-use plastic bottled water? (n=3355)



Reasons cited for purchasing single-use plastic bottled water (% of respondents)

Key Findings

Perceptions about bottled and tap water

Most respondents strongly agreed that drinking water is a healthy habit, with 72% completely agreeing and another 24% agreeing, indicating widespread awareness of the importance of hydration. However, perceptions around bottled water's health benefits were more divided – while 49% agreed that bottled water is healthier than tap water, another 29% remained neutral about the subject. Views on the safety of tap water in the park were also mixed, with nearly 42% disagreeing or completely disagreeing that it is unsafe while another 31% remained neutral.

Environmental concerns were more pronounced: 42% completely agreed and 35% agreed that plastic bottles are a major source of pollution in the park. Interestingly, there was low agreement with the statement that buying bottled water is a waste of precious resources, with only 22% agreeing, and 48% actively disagreeing - highlighting a gap in awareness around water scarcity and sustainability messaging.

Source of bottled water

Most respondents (64%) purchase bottled water from shops, kiosks, or restaurants inside the park, making these outlets the primary point of sale. A significant portion (44%) also buy bottled water outside the park, suggesting consumption decisions are made in advance. Only 17% of respondents indicated they do not buy bottled water at all.

Recycling habits and accessibility

While a large proportion (63%) reported that they always recycle plastic bottles and packaging, fewer visitors agreed that appropriate recycling bins are easily accessible (42% “always”, 29% “occasionally”). Only about half (49%) consistently noticed the availability of recycling bins, suggesting room for infrastructure improvement and awareness.

Willingness to switch to alternatives

Many visitors expressed openness to sustainable alternatives should the Park decide to ban single-use plastic bottled water. More than 80% were likely or highly likely to bring their own reusable bottles. Most respondents (56%) indicated they would likely purchase a SANParks-branded durable plastic bottle, while 44% expressed interest in buying a SANParks-branded aluminium bottle. Additionally, 40% said they would consider purchasing glass bottled water, even if it came at a higher price.

Willingness to switch to alternatives if single-use plastic bottled water were banned from parks

Which of the following options would you likely opt for if single-use plastic bottled water were banned from parks?	% of respondents who answered “Likely” or “Highly likely”
I would bring along my own multi-use bottle	81%
I would purchase a SANParks branded durable plastic (multi-use) bottle in the Park and use it for the remainder of my stay	56%
I would purchase a SANParks branded aluminium (multi-use) bottle in the Park and use it for the remainder of my stay	44%
I would purchase glass bottled water even if it was more expensive	40%
I would not buy any water, but rather consume more cool drinks and other beverages	12%

Preferences for refilling options

Visitors were asked about their preferred sources of drinking water during their visit to the Park and expressed support for a range of alternatives. Nearly 90% indicated they would be willing to refill their bottles with clean spring water provided at dedicated refill stations, while 76% were prepared to pay a small fee to refill with purified water at shops or reception areas. Just over half (54%) said they would

bring their own water from home, whereas only 35% were comfortable refilling from a regular tap. Fewer than 10% preferred to increase their consumption of soft drinks instead, highlighting a strong preference for accessible and sustainable water options.

These findings suggest that while bottled water is still widely used, visitors are open to changing their behaviour – particularly if alternative options are accessible, affordable, and clearly communicated. Recycling habits are present but hampered by limited infrastructure visibility, and visitor perceptions around bottled vs. tap water highlight the need for targeted educational messaging.

Management Implications

1. Introduce water refill stations across the park

Given the strong visitor support for refilling reusable bottles – with nearly 90% in favour of spring water refill stations and 76% willing to pay a small fee – SANParks should invest in convenient and visible water refill infrastructure at camps, shops, and reception areas. This would offer a sustainable alternative to single-use plastic bottles and meet visitor expectations for safe drinking water.

2. Promote SANParks-branded reusable water bottles

With many visitors indicating willingness to purchase SANParks-branded reusable plastic (56%) or aluminium bottles (44%), there is a clear opportunity to introduce and promote reusable merchandise. This could generate additional revenue, reduce waste, and serve as a visible commitment to sustainability.

3. Improve recycling infrastructure and visibility

Although many visitors (63%) reported they always recycle, only about half consistently noticed recycling bins, indicating the need for better signage, more visible bin placement, and public messaging to improve recycling behaviour and reduce plastic waste in parks.

4. Address knowledge gaps through targeted communication

There is widespread concern about plastic pollution, yet a low awareness of water scarcity issues, with nearly half of respondents disagreeing that bottled water is a waste of resources. SANParks should develop education campaigns to highlight the environmental impact of bottled water, the value of water in a dry country, and the safety of park tap water where applicable.

5. Re-evaluate bottled water sales in park outlets

As 64% of respondents say they buy bottled water inside the park, SANParks has direct control over a major source of plastic consumption. A phased reduction or ban on single use bottled water, combined with the provision of alternatives (refill stations, reusable bottles), would align with responsible tourism principles.

6. Support behavioural change with incentives and clear messaging

Since many visitors base their bottled water use on perceived safety and convenience, SANParks should provide clear, trustworthy information about tap water quality, and offer incentives for reusable bottle use, such as discounted refills or loyalty perks, to shift behaviour towards more sustainable habits.

Recommended citation: Slabbert, L. & Moore, K.T.B. (2026). Kruger National Park visitors' willingness to switch from single-use plastic bottled water to alternatives. In A Decade of Learning: Tourism Research in SANParks (2015–2025) (pp. 61-65). South African National Parks.

Related internal report: Slabbert, L. & Moore, K.T.B. (2018). Research report: Kruger National Park visitors' willingness to switch from single-use plastic bottled water to alternatives (2017-2018). South African National Parks.



ENVIRONMENTAL MANAGEMENT EXPECTATIONS VERSUS EXPERIENCES OF TOURISTS IN KNP

Researchers: Anneli Douglas (University of Pretoria), Jan-Albert Wessels (University of South Africa), Jenny Pope (Integral Sustainability), Angus Morrison-Saunders (Edith Cowan University)

Introduction

Sustainable tourism development and responsible tourism practices in SANParks rely on decision-making tools like Environmental Impact Assessments (EIAs) and visitor expectation and experience surveys. Aligning these tools is crucial to enhance their quality, effectiveness, and purpose within the context of sustainability in protected areas.

Methods

Focusing on Kruger National Park, researchers comprehensively appraised EIAs for three projects: additional tents at Tamboti Camp, improvements to Satara's caravan and camping facilities, and the Skukuza Safari Lodge. They developed a scale to measure visitor expectations and experiences against EIA expectations, incorporating responsible tourism guidelines. A paper-based questionnaire, consisting of 38 items across six categories, was distributed to a convenience sample of 201 day and overnight visitors, both domestic and international in 2019. Respondents were asked to rate the importance (expectations) of various responsible tourism aspects when visiting any camp in Kruger National Park, followed by their experience (performance) specifically at Tamboti and Satara camps. Ratings were captured on a 5-point scale, with expectations ranging from 1 (not important) to 5 (extremely important), and experiences from 1 (extremely poor) to 5 (excellent).

Who participated?

The final sample consisted of 201 respondents, with a nearly even gender distribution (48% male and 52% female) and an average age of 43, ranging from 18 to 80 years old. The vast majority of respondents were South African residents, although international representation included visitors from the Netherlands, France, the UK, and the USA. Educationally, most respondents were highly educated, with 45% holding a postgraduate degree, followed by 23% with a diploma or certificate, 21% with an undergraduate degree, and 11% with only secondary schooling. Most participants were Wild Card members (64%), indicating a strong affiliation with SANParks, and they reported visiting the park an average of 18.5 times, with some visiting as many as 200 times. In terms of travel companions, the majority (65%) visited with family, followed by those travelling with friends and family (18%), friends alone (12%), solo (3%), and a small number with special interest groups (1%).

Key findings

Expectations were highest for biodiversity protection, landscape preservation, and safety, with actual performance rated best for adequate fencing, biodiversity protection, and indigenous landscaping. The Biodiversity and Geology category had both the highest expectation (mean=4.63) and performance (mean=4.19), reflecting SANParks' conservation mandate. While expectations were also high for energy, water and air (mean=4.35), performance was strongest in electricity availability and odour management. The biggest gap appeared in compliance and enforcement, largely due to limited interpretive signage and perceived lack of rule enforcement, possibly due to resource prioritisation for anti-poaching efforts. Performance in access and traffic management often exceeded expectations, while visual and aesthetic and local culture scored lowest in importance, indicating that wildlife and nature remain the primary visitor drawcards. Visitors showed little support for limiting private vehicle use, suggesting low willingness to compromise convenience for environmental gain. Notably, nine items were rated higher in performance than in expectation. Since feedback was camp-specific, results should not be generalised to the entire park.

Management implications

This study represents a pioneering effort to determine if visitor surveys can serve as a measure for EIA follow-up, effectively making it a pilot study. Further research is essential to provide a more comprehensive view and to develop holistic recommendations. Several areas for future research have been identified to strengthen the findings:

- Extent of EIA utilisation: To what extent are EIAs used to guide and manage visitor behaviour to reduce environmental impacts?
- Alignment with SANParks strategy: How aligned are EIAs with SANParks' context and strategic direction?
- Incorporating sustainability principles: What additional considerations could be included in SANParks EIAs to better reflect sustainability principles and the principles of sustainable and responsible tourism?
- Visitor pro-environmental behaviour: Are some visitors to SANParks more inclined to engage in pro-environmental behaviour than others?

To address these questions, further research is needed in other national parks, such as Mokala National Park, Kgalagadi Transfrontier Park, or Mapungubwe National Park. This research will depend on access to EIAs of new developments within these parks. As a first effort, this study not only provides valuable insights for park management but also delivers practical survey instruments that can be refined and applied in future projects, ensuring ongoing learning and stronger integration of visitor perspectives into EIA follow-up.



Photo: Liandi Slabbert

Environmental management expectations vs. environmental management experiences

	Expectation mean	Experience mean		Expectation mean	Experience mean
Visual and Aesthetic			Biodiversity and Geology		
Aesthetic appeal	3.78	3.71	Preservation of geology & landscape	4.64	4.14
Rustic setting	3.91	3.96	Protection of Biodiversity	4.80	4.22
Architecture of buildings blend with environment	4.03	4.02	Areas include only indigenous species	4.46	4.20
Buildings have an ecologically responsible design	4.12	3.38	Average	4.63	4.19
Natural building material was used	3.88	3.62	Compliance, enforcement for safety and awareness		
Sufficient outside lighting	3.32	3.58	Sustainability education / awareness	4.10	3.38
Minimal visual impact	4.06	3.77	Interpretive information	4.12	3.14
Consider local culture in architecture	3.44	3.64	Enforcement of park rules	4.52	3.50
Privacy from other visitors and staff	3.98	3.78	Adequate fencing	4.25	4.23
Average	3.84	3.72	Safety & Security	4.54	4.07
Energy, Water and Air			Average		
			4.31 3.66		
Energy, Water and Air			Access and Traffic		
Effective waste management	4.48	3.65			
Water conservation management	4.42	3.48	Management of congestion	4.20	3.58
Energy efficiency	4.38	3.57	Sufficient game viewing routes	4.51	4.06
Electricity availability	4.03	4.20	Road quality	4.15	3.92
Noise levels management	4.42	3.95	Access to facilities and products	3.68	3.97
Recycling	4.35	3.59	Limiting of private transport	3.31	3.47
Light pollution management	4.18	3.90	Sufficient parking	3.77	4.16
Odour management	4.44	4.02	Cellular reception	3.36	3.31
Water quality for human consumption	4.46	3.90	Universal accessibility (disabilities)	4.04	3.66
Average	4.35	3.81	Opportunity to get to viewpoints, bridges or picnic spots	3.81	3.84
Local Community			Average		
			3.87 3.77		
Employ local community	4.24	4.02			
Opportunities for tourists to interact with locals	3.29	3.34			
Access to local products	3.57	3.34			
Average	3.70	3.57			

Recommended citation: Douglas, A. Wessels, J.A., Pope, J., Morrison-Saunders, A., (2026). Environmental management expectations versus experiences of tourists in KNP. In *A Decade of Learning: Tourism Research in SANParks (2015-2025)* (pp. 67-69). South African National Parks.

“ *Open quiet natural beauty is vital to my sense of peacefulness* ”
– SANParks visitor, 2022.



SANPARKS STUDY ON ASSESSING CLIMATE CHANGE VULNERABILITY IN SOUTH AFRICA'S NATIONAL PARKS



Summary written by SANParks Scientific Services

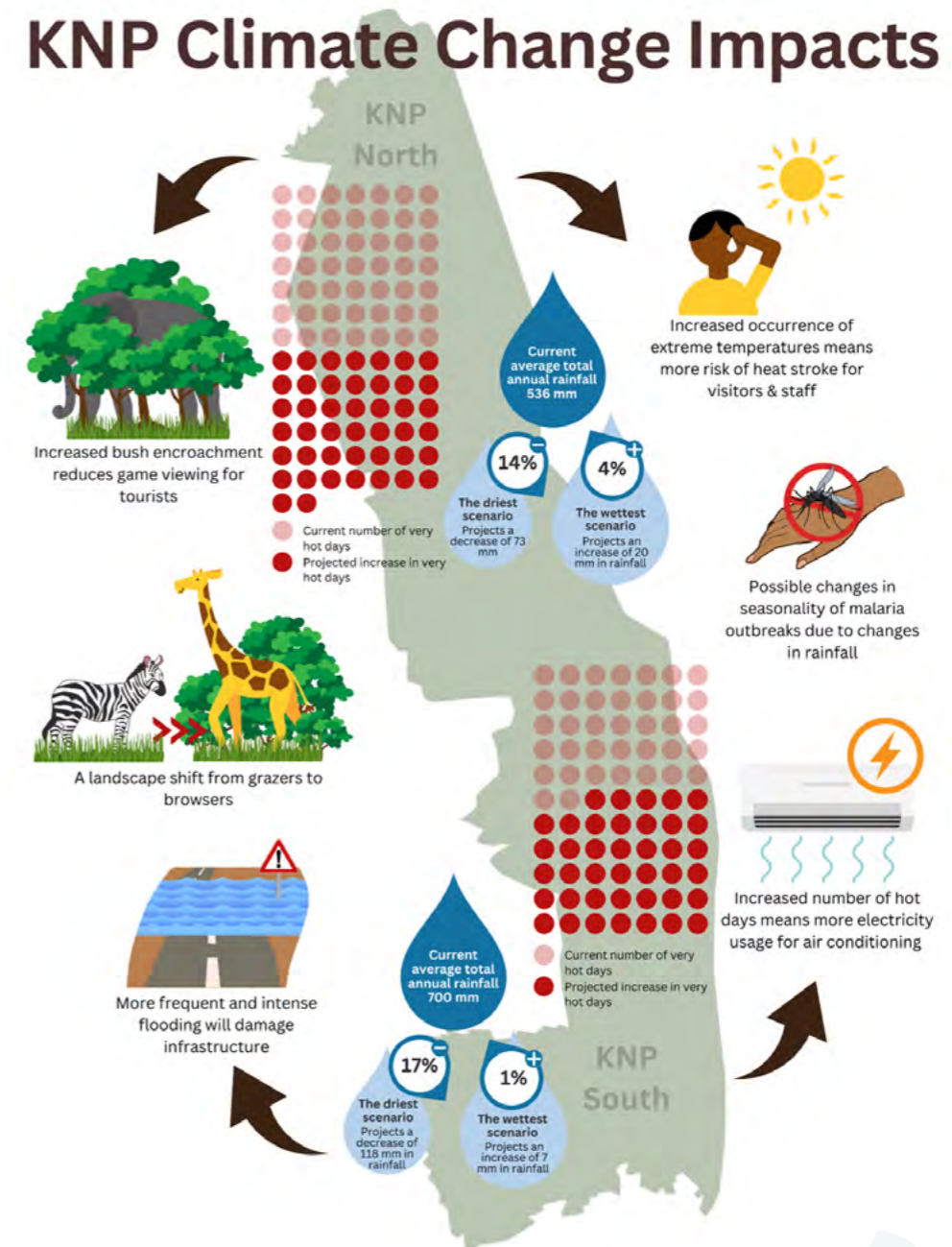
SANParks scientists conduct research on the anticipated impacts of climate change on ecosystems, infrastructure, and tourism within national parks. The research highlights both the growing risks and emerging opportunities for tourism across South Africa's protected areas and emphasises the necessity for targeted management strategies to support species adaptation, safeguard cultural and infrastructural assets, and maintain tourism viability amidst evolving environmental conditions.

Studies led by SANParks Scientific Services and partners have advanced understanding of how temperature increases, drought, altered rainfall, and extreme weather events are reshaping visitor patterns, ecosystem dynamics, and affecting the park infrastructure that enables memorable tourism experiences. In Table Mountain National Park, water availability is a key concern for the future, while in Kruger and Au-grabies Falls national parks warming trends may make certain activities uncomfortably hot. In West Coast National Park, shifts in rainfall patterns may alter the timing of floral displays that attract large visitor numbers. Research into visitation has showed definite patterns in relation to temperatures, with occupancy decreasing at high temperatures. While longer warm seasons may extend local tourism windows in the cooler southern parts of the country, they may also go hand in hand with increased frequency of heat-related emergencies, and water shortages, with impacts on sanitation infrastructure.

Discussing the implications of climate change for tourism and related operations at a workshop in Cape Town, July 2023



KNP Climate Change Impacts



STUDIES ON THE LINK BETWEEN SPECIES OF CONCERN AND TOURISM

Key park-level vulnerabilities have been researched alongside the review of park management plans. Across the board, infrastructure and visitor safety under extreme heat and storm events require consideration of disaster risk planning, while loss of charismatic species and degradation of landscapes are of concern for tourism attractiveness. Coastal parks face added exposure to sea-level rise, wind damage, and erosion. A factor that has not yet been researched is the potential impact on long-haul travellers who may no longer wish to undertake journeys that generate a large carbon footprint. Strengthened local tourism could help offset potential declines in long-haul international visitors as global travel behaviour responds to climate concerns.

Looking ahead, future research should move beyond vulnerability assessment to integrated, solution-oriented approaches. Priorities include understanding visitor behaviour and safety under extreme conditions; linking ecological changes to visitor experience and economic outcomes; mapping climate risks to infrastructure; and evaluating the cost-effectiveness of adaptation options such as cooling measures, water reuse, or trail redesign. Developing standardised data systems for visitor incidents, microclimate monitoring, and phenology tracking will be critical. A coordinated tourism-climate research programme, grounded in cross-disciplinary partnerships, can help SANParks identify where adaptation investment will yield the greatest resilience gains, ensuring that South Africa's protected areas remain both ecologically sustainable and viable tourism destinations under a changing climate.

To learn more about SANParks' climate change research go to: <https://www.sanparks.org/conservation/scientific-services/tag?climate-change>

This body of work is complemented by that of others, including Coldrey et al. (2022), who assessed the vulnerability of South Africa's national parks to climate change through a comparative framework evaluating exposure, adaptive capacity, and management resilience).

Related article:
Coldrey, K.M., Turpie, J.K., Midgley, G., Scheiter, S., Hannah, L., Roehrdanz, P.R. and Foden, W.B. (2022) 'Assessing protected area vulnerability to climate change in a case study of South African national parks', *Conservation Biology*, e13941. <https://doi.org/10.1111/cobi.13941>.

THE IMPACT OF RHINO POACHING ON TOURISM IN KRUGER NATIONAL PARK

Researchers: Berendien Lubbe, Elizabeth Ann du Preez, Anneli Douglas, Felicité Fairer-Wessels, University of Pretoria

Introduction

Wildlife tourism plays a central role in attracting both domestic and international visitors, often driven by the desire to reconnect with nature and encounter iconic, charismatic species like the Big Five. The threat to rhino populations due to poaching has triggered important questions about how these conservation challenges and its related security measures affect tourist motivations, experiences, and future visitation. While visitors may still value the opportunity to see endangered species, the implications of intensified anti-poaching efforts on tourism remained unclear. This study, commissioned by SANParks in conjunction with the Department of Environmental Affairs, the United Nations Environment Programme, the Global Environmental Fund, and Ezemvelo KZN Wildlife, explores the impact of rhino poaching on tourism, focusing on visitor awareness, perceptions, and responses to both poaching activities and management interventions.

Methods

In 2016, researchers used a two-step process: first, face-to-face semi-structured interviews to explore tourists' experiences and perceptions of poaching; then focus groups to examine how proposed anti-poaching measures might shape future visitor experiences. Data were collected in Kruger National Park (KNP) and Hluhluwe-iMfolozi Game Reserve. In KNP, 120 tourists were interviewed across five accommodation types and camps, while additional focus groups were conducted to explore perceptions of proposed anti-poaching measures. A combination of quantitative survey responses and qualitative insights from open-ended questions and group discussions ensured a comprehensive understanding of the measurable trends in visitor perceptions and the deeper concerns underlying their responses. While both parks were included in the data collection, this report focuses on findings relating to Kruger National Park.

Key findings

Rhinos emerged as the second most popular animal visitors wanted to see, mainly because of their endangered status and symbolic value. However, while rhinos were important, they were not the primary driver of visitation. Visitors prioritised experiencing wildlife in their natural state, seeing a variety of species, and enjoying the scenery and safety of the park.

Most domestic visitors were aware of rhino poaching, with many demonstrating knowledge of poaching statistics and drivers of rhino horn demand. The issue evoked strong emotions, with visitors expressing frustration that “not enough is being done.” Most indicated willingness to contribute to anti-poaching through donations, volunteering, or awareness activities.

Around a third of participants reportedly had been personally affected by poaching-related incidents, such as seeing carcasses, hearing gunshots, or encountering anti-poaching patrols. While these did not deter current visits, they raised doubts about future visits and contributed to feelings of unease about safety. More frequent visitors were most exposed to such incidents.

Visitors generally complied with anti-poaching measures such as delays at entry gates and roadblocks, though some measures caused discomfort. The most negatively perceived intervention was regular helicopter patrols, which disrupted the sense of tranquillity and could deter future visits. Visitors also highlighted a lack of transparent communication from SANParks, leading to speculation and distrust.

Management implications

The findings highlight that SANParks faces a delicate balancing act in Kruger National Park. On the one hand, rhino poaching has increased global awareness of conservation issues and intensified visitor interest in rhinos as an endangered species. On the other hand, visible poaching incidents and intrusive anti-poaching measures risk unsettling tourists and undermining their sense of safety and enjoyment.

Management must therefore prioritise transparent communication and trust-building, ensuring visitors are informed about both the scale of the poaching crisis, as well as the successes of anti-poaching interventions. Regular updates via official channels, reception staff, and interpretive materials can counter speculation and demonstrate accountability.

Anti-poaching strategies should aim to be effective yet minimally disruptive. Measures that directly affect the park’s tranquillity should be carefully managed and explained to visitors. When restrictions are unavoidable, SANParks can frame them as part of a shared responsibility for protecting rhinos, reinforcing visitors’ willingness to support conservation.

Finally, the findings highlight the importance of leveraging visitor support. Many visitors expressed willingness to contribute financially or through advocacy, which presents opportunities for innovative fundraising campaigns, donations, or conservation-linked tourism products. Harnessing this goodwill can transform visitors from passive observers into active partners in rhino protection.

By addressing these areas, SANParks can mitigate the potential negative impact of poaching on tourism while strengthening its conservation mandate and sustaining Kruger National Park as a leading wildlife tourism destination.

Recommended citation: Lubbe, B. A., du Preez, E. A., Douglas, A., & Fairer-Wessels, F. (2026). The impact of rhino poaching on tourism in Kruger National Park. In A Decade of Learning: Tourism Research in SANParks (2015–2025) (pp. 75–76). South African National Parks.

Related article:

Lubbe, B. A., du Preez, E. A., Douglas, A., & Fairer-Wessels, F. (2017). The impact of rhino poaching on tourist experiences and future visitation to National Parks in South Africa. Current Issues in Tourism, 22(1), 8–15. <https://doi.org/10.1080/13683500.2017.1343807>

THE PERCEIVED TOURISM ATTRACTION VALUE OF RHINOS AS A TOURISM PRODUCT

Researcher: Lindie du Plessis, North-West University.

Introduction

Wildlife resources are a cornerstone of South Africa’s tourism competitiveness, with the Kruger National Park (KNP) internationally renowned for its Big Five offering. Among these, rhinos represent both a critical conservation concern due to escalating poaching and a unique tourism attraction that influences visitor experiences. Statistics on the decline in rhino numbers highlight the urgent need to understand the perceived tourism value of rhinos, particularly within KNP, where their presence contributes to the park’s iconic status. This study investigated the tourism attraction value of rhinos by exploring visitor motivations, the importance of rhinos to their park experiences, and how conservation practices such as dehorning and enclosures might influence future visitation interventions.

Methods

Structured interviews were conducted with 35 overnight visitors to KNP during December 2021, across rest camps including Crocodile Bridge, Lower Sabie, Pretoriuskop, Satara, and Skukuza. Visitors were selected based on their experience of the Big Five and willingness to participate. Data was gathered on socio-demographic profiles, motivations, perceptions of rhinos, and attitudes towards conservation strategies. Interviews were transcribed and analysed using Creswell’s six-step framework for thematic qualitative analysis. Trustworthiness was ensured through expert review of the interview schedule and data triangulation.

Key findings

The socio-demographic profile indicated that most respondents were South African, English- or Afrikaans-speaking, over 40 years of age, and long-term repeat visitors to KNP. Motivations centred on being in nature (71%), relaxation (54%), and getting away (34%), with family and tradition also featuring. While the Big Five was valued, most participants (77%) stated that sightings were a “bonus” rather than essential, though rhinos were consistently mentioned as one of the most significant species.

Presented with a scenario of rhino extinction, 31% of participants said they would continue visiting KNP, 11% would stop visiting, and 57% would split their time between KNP and other parks still hosting rhinos. This highlights both loyalty to KNP and the importance of rhinos in destination choice. The majority (27 out of 35) felt that the absence of rhinos would negatively affect their experience, particularly due to educational and emotional reasons such as the desire to show children rhinos in the wild.

Respondents expressed strong support for conservation actions. Many saw awareness campaigns (13 participants), better governance and anti-poaching management (9 participants), and financial contributions (9 participants) as essential. Opinions on conservation methods were divided:

- Smaller enclosures were supported by some as a secure option, though others feared it would feel like a zoo, or enable corruption.
- Willingness to pay: Over half (51%) indicated willingness to pay additional fees to see rhinos in protected enclosures, with others agreeing only if funds were transparently managed.
- Dehorning: Most participants disliked the practice, emphasising the symbolic and aesthetic importance of horns, especially for children’s experiences, though some reluctantly accepted it as a safety measure.

STUDIES ON THE LINK BETWEEN SPECIES OF CONCERN AND TOURISM

Management implications

The findings emphasise the tourism and conservation value of rhinos for KNP and South African tourism more broadly. Their presence contributes to the authenticity of the Big Five experience and significantly shapes visitor satisfaction and destination loyalty.

Several recommendations were made for park management. Firstly, there is a need to strengthen anti-poaching governance and improve transparency, as many visitors expressed concerns about corruption and a lack of trust in current systems. Rebuilding public confidence is essential if conservation strategies are to be effective and widely supported. Secondly, the research highlights that visitors are willing to contribute towards rhino conservation, both financially and through advocacy. Management should therefore find ways to leverage this support more actively – whether by expanding awareness campaigns, promoting conservation messages throughout the park, or introducing optional conservation fees and donation mechanisms that are transparent and well-managed. Third, alternative conservation strategies such as the creation of secure enclosures should be considered. While many visitors recognised the value of such measures in protecting rhinos, others raised concerns about the experience becoming too like a zoo. Management would therefore need to balance the benefits of safety with the importance of maintaining a natural, authentic experience for visitors. Finally, interpretation and education efforts should be enhanced to ensure that visitors continue to engage meaningfully with rhino conservation, even if opportunities to view rhinos in the wild become less frequent. One option could be to establish dedicated rhino interpretation centres within the park, offering interactive educational experiences that highlight conservation challenges and successes. This could help sustain visitor interest and awareness, while also deepening their understanding of the broader significance of rhino protection.

Overall, this study demonstrates that rhinos hold significant perceived tourism attraction value and that their conservation is not only vital for biodiversity but also for sustaining the competitive advantage of the Kruger National Park as a leading wildlife tourism destination

Recommended citation: Du Plessis, E. (2026). The perceived tourism attraction value of rhinos as a tourism product. In A Decade of Learning: Tourism Research in SANParks (pp. 77-78). South African National Parks.

THE SOCIO-ECONOMIC VALUE OF THE AFRICAN PENGUIN

Commissioned by the Endangered Wildlife Trust and conducted by Anchor Environmental

The African penguin, endemic to southern Africa, has suffered a dramatic population decline of over 95% in the past century due to habitat destruction, overfishing, and increasing human activities. This rapid decline poses significant ecological, economic, and reputational risks for South Africa. The study was commissioned by the Endangered Wildlife Trust to assess the socio-economic value of African penguins, particularly their impact on tourism, property values, conservation funding, and public willingness to pay for their protection. Given their role in drawing domestic and international visitors, the research aimed to provide decision-makers with a comprehensive understanding of the species' broader economic contributions and the potential losses if conservation efforts fail. The study employed a mixed-method approach, combining existing literature, statistical data, surveys, and expert interviews. Tourism value was assessed through visitor statistics, contingent valuation methods, and travel cost analysis, focusing on key colonies such as Boulders Beach in Table Mountain National Park. A public willingness-to-pay survey estimated the species' existence value, while additional qualitative assessments explored the impact of penguins on property markets, education, and media representation. Economic modelling was used to estimate the total economic contribution of penguin-related tourism and its broader financial influence on South Africa.

The full report is available at: <https://ewt.org/wp-content/uploads/2024/10/African-Penguin-Socio-Economic-Report-14-Oct-2024.pdf>





Theme 4:

UNDERSTANDING AND ATTRACTING VISITORS TO PARKS

Photo: Augrabies Falls National Park taken by Rudolph de Girardier

A MARKET SEGMENTATION OF OVERNIGHT VISITORS TO NATIONAL PARKS

Researcher: Liandi Slabbert, SANParks.

Introduction

This segmentation study of overnight visitors analysed preferences, behaviours, and socio-demographic characteristics to identify distinct market segments. The study, conducted in the years 2018 to 2019, aimed to provide SANParks with actionable insights to better understand its overnight visitor base, guide product development, refine marketing strategies, and ultimately strengthen both visitor satisfaction and organisational sustainability.

Overnight visitors contribute significantly to revenue generation, yet their needs, expectations, and behaviours shift in response to broader social, economic, and environmental changes. By understanding the preferences, motives, and perceptions that drive overnight visitation, SANParks can identify priority segments, refine offerings, and inform sustainable tourism management and strategic decision-making while strengthening its competitiveness in a dynamic environment.

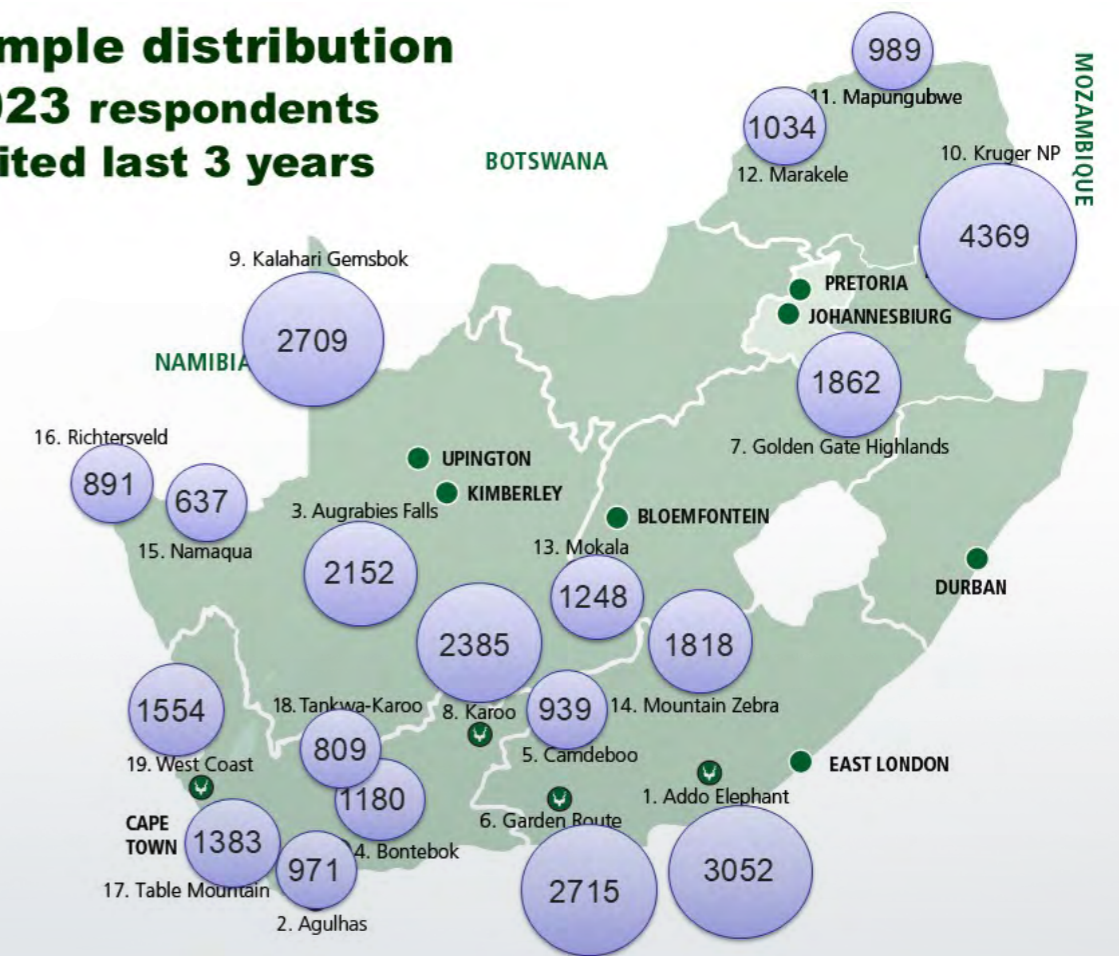
Methods

Responses were collected from 6 023 overnight visitors via online (5 238) and paper-based (785) surveys across multiple parks. The survey covered demographics, behaviour, psychographics, and preferences for accommodation, activities and ecotourism values. With support from the University of Pretoria, factor analyses were run on park motivations and destination-choice factors. Cluster analysis was used to identify visitor segments using a combination of visitor motivations, destination choices, relationship with SANParks, and ecotourism predisposition.

Who participated?

Most respondents were domestic travellers (91%). The sample included slightly more males (57%) than females (43%). Visitors were predominantly older: 62% were aged 56 or older, with a further 20% aged 46 to 55, indicating a mature visitor base. Among those who disclosed their children's ages, 39% had minor children and 31% had school-aged children. Respondents were longstanding supporters of SANParks, with 71% holding a current Wild Card. A significant majority of respondents developed an early connection with national parks, with 56% first exposed as minors (under 18) and a further 30% introduced as young adults, highlighting the long-standing and intergenerational nature of their relationship with SANParks. Travel decisions were typically made with immediate family (68%). Group sizes were generally small: most visitors travelled in pairs (57%), followed by 33% in groups of three to five people, typically family parties.

Sample distribution 6 023 respondents Visited last 3 years



Sample distribution

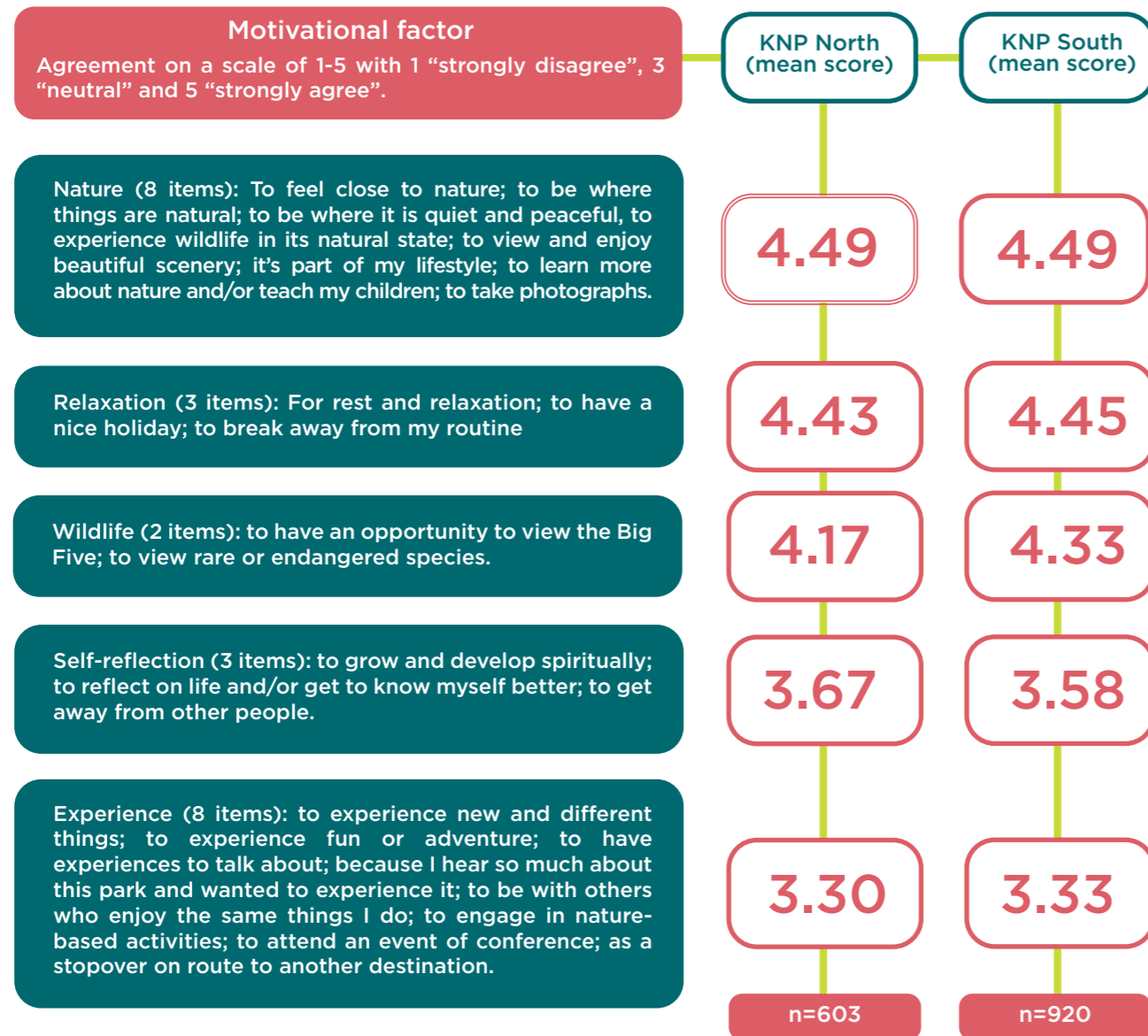


Key Findings

Travel behaviour

Most overnight visitors are frequent and loyal travellers, with 45% visiting at least one park four or more times in a three-year period. This loyalty is accompanied by a broad travel footprint – nearly half of respondents had explored five or more parks in that same timeframe, suggesting that park-goers are not confined to a single destination but actively seek variety across the SANParks network. In Kruger specifically, stays tend to be longer than in other parks, with roughly half of visitors staying between four and seven nights and about one in five extending visits beyond a week. This pattern indicates a high level of commitment, time investment and emotional connection to the park experience.

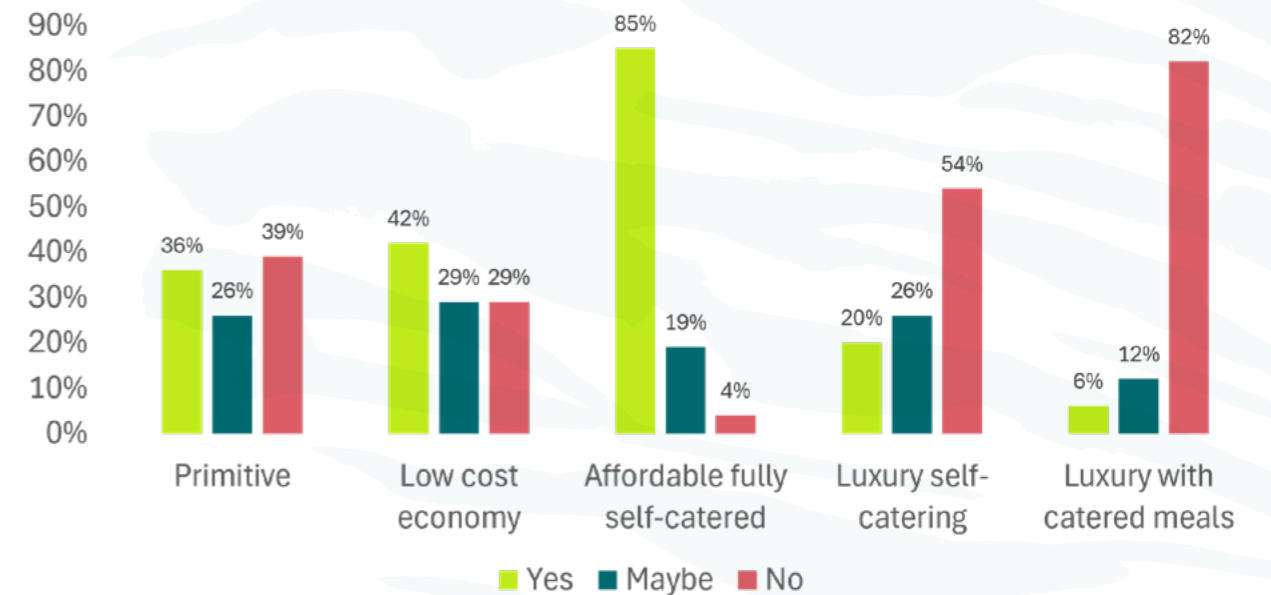
Motivations for visiting Kruger National Park



Interest in fixed accommodation options

This sample of overnight visitors showed a clear preference for affordable, fully equipped self-catering accommodation, with 85% expressing interest in this option. Primitive and low-cost economy units drew more moderate interest (36% and 42% respectively), although nearly a third of respondents said they would not consider these types. Luxury self-catering units were less appealing, attracting only 20% interest, while 54% actively declined this option. The least popular choice by far was luxury hotel or lodge accommodation with catered meals, rejected by 82% of visitors. Overall, these results highlight that the typical overnight park guest is cost-conscious and prefers simple, self-sufficient accommodation that aligns with an authentic, nature-based experience.

Interest in fixed accommodation options



Interest in fixed accommodation options

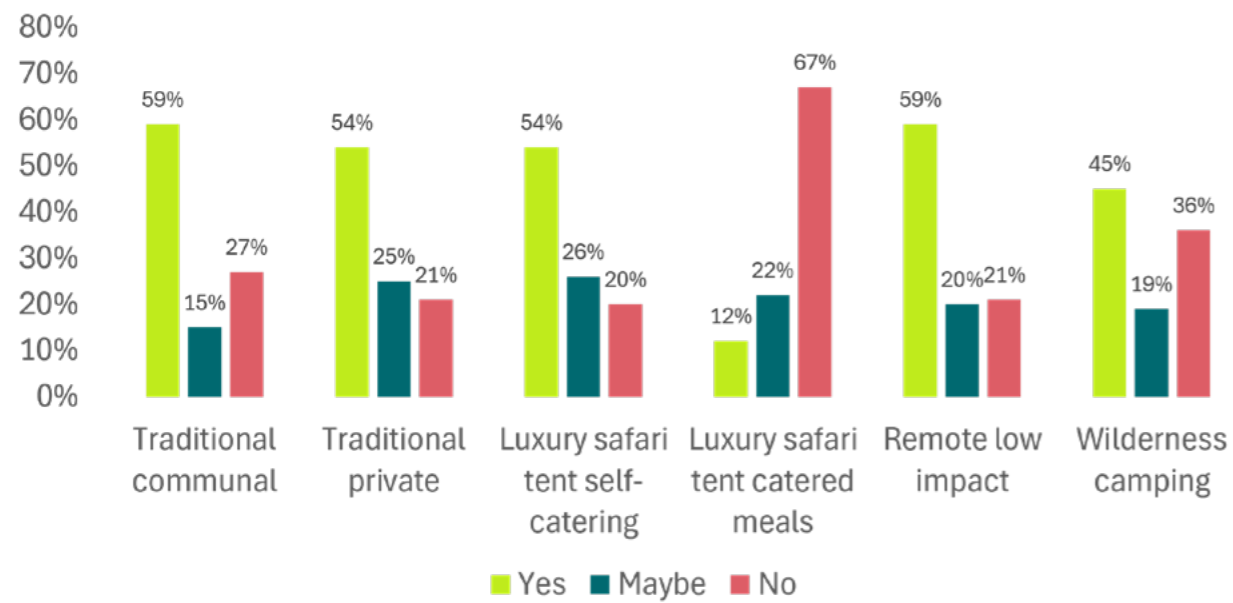
Type	Description
Primitive	Primitive accommodation - no electricity with communal kitchens and ablutions
Low cost economy	Low cost economy units - bungalows or huts with communal kitchens
Affordable self-catering	Affordable and fully equipped self-catering chalet / bungalow / cottage
Luxury self-catering	Luxury self-catering chalet / cottage with modern furniture and satellite television
Luxury hotel or lodge	Luxury hotel or lodge accommodation with catered meals and satellite television

Interest in camping accommodation options

The results reveal strong interest among overnight visitors in a range of camping accommodation options. Traditional campsites remain the most popular, with 59% of respondents expressing interest in campsites with communal ablutions, and 54% favouring premium sites with private ablutions. Similarly, luxury safari tents equipped for self-catering are also appealing to 54% of visitors. However, luxury safari tents offering catered meals appear less desirable, with 67% saying they would not consider this option. Remote camping with low-impact infrastructure holds substantial appeal, matching traditional campsites at 59% interest. Wilderness camping attracts moderate interest (45%), though a notable 36% indicated they would not consider it – suggesting that while some visitors value rustic, remote experiences, comfort and accessibility remain important factors.

Type	Description
Traditional campsite	Traditional campsite with communal ablutions
Premium campsite	Premium campsite with private ablutions
Luxury safari tent self-catering	Luxury safari tent fully equipped for self-catering
Luxury safari tent catered meals	Luxury safari tent with catered meals
Remote camping	Campsite in a remote area of the Park - low impact fencing, water and enviroloos provided, solar or no power.
Wilderness camping	Wilderness campsite - remote with no fences, no water, no power and no facilities whatsoever

Interest in camping accommodation options



When selecting nature-based destinations, overnight visitors to national parks prioritise experiences that immerse them in the natural environment. Respondents rated the importance of different destination attributes on a five-point Likert scale ranging from 1 = Not important at all to 5 = Very important. The results show that the highest-rated factors influencing destination choice were safety against crime (mean = 4.74), opportunity to spend time in nature (4.67), and opportunity to see wildlife (4.60).

Other key considerations included fair accommodation pricing (4.58), the ability to escape from crowds (4.48), and ease of booking (4.46). Factors such as wilderness feeling (4.40) and quality of accommodation (4.18) also scored highly, indicating that visitors value tranquil, safe, and affordable nature experiences that combine comfort with authenticity. In contrast, aspects like connectivity, social opportunities, and activities for children ranked lowest, reflecting the limited importance of technology, entertainment, and social interaction in the national park experience.

To better understand the underlying dimensions shaping these preferences, an Exploratory Factor Analysis was conducted. The analysis identified four coherent factors explaining the main patterns in visitor priorities: Accommodation - encompassing quality, official grading, and favourable reviews (mean = 3.68); Nature - reflecting immersion in natural settings, wildlife viewing, and wilderness feeling (mean = 4.53); Experience - related to novelty, adventure, sightseeing, and opportunities to socialise (mean = 3.00); Family-friendly - covering family accommodation and activities for children (mean = 2.71).

Together, these results confirm that the core motivations for choosing a destination are strongly nature-driven, supported by safe, affordable, and self-directed experiences, while social, entertainment, and child-oriented amenities play a secondary role in destination decision-making.

TOP PRIORITIES WHEN CHOOSING NATURE-BASED DESTINATIONS

Importance on a scale of 1-5 with 5 “very important” and 1 “not important at all”.

Nature

4.53

- Opportunity to spend time in nature
- Opportunity to see wildlife
- The destination should allow me to escape from the crowds
- Destination should have a wilderness feeling

4.66
4.59
4.48
4.40

Accommodation

3.68

- Safety against crime
- Ease of booking
- Quality of the accommodation
- Accommodation should have a beautiful view
- Safety against wild animals
- Accommodation should have received favourable reviews from other users
- Accommodation should have good official star grading
- Shops and good restaurant must be available nearby
- Good connectivity at the destination

4.74
4.46
4.18
4.09
3.42
3.34
3.10
3.02
3.00

Experience

3.00

- Opportunity to see and experience new things
- Opportunities for sightseeing nearby
- Adventure activities nearby
- The destination provides opportunities to meet and socialise with other people

3.94
3.08
2.66
2.32

Family friendly

2.71

- Accommodation should cater for families
- Availability of activities that cater for children

3.18
2.25

Management implications

View visitors as part of a park network: The strong tendency of travellers to visit multiple parks indicates that visitors should be viewed as part of a system-wide network, not tied to single destinations. This supports opportunities for cross-promotion, loyalty optimisation (e.g. Wild Card), and multi-park itineraries that deepen engagement across the SANParks portfolio.

Prioritise immersive, nature-focused experiences: Overnight visitors value nature immersion, tranquillity, and self-sufficiency over luxury or commercial offerings. Demand is strongest for camping, self-catering, and remote low-impact options, while catered luxury tents attract limited interest. Product development should therefore focus on enhancing and diversifying self-catering and nature-integrated accommodation, with luxury offerings limited to flagship destinations and niche markets where exclusivity complements the parks' core value of affordable, authentic nature experiences.

Affordability and quality drive visitation: Across all visitor segments, fair pricing, well-maintained facilities, and quality accommodation are key motivators for repeat visitation. Sustaining infrastructure and pricing strategically is therefore essential to retain loyal guests and attract new ones.

Align with visitors' ecotourism values: Most overnight visitors already display strong ecotourism-oriented attitudes – including appreciation for nature, ethical travel, and willingness to support conservation. SANParks can confidently expand nature-based, educational, and conservation-linked experiences that reinforce these existing values.

Balance connectivity with wilderness: While many guests seek digital disconnection, a portion – especially in Kruger – expresses interest in WiFi in main camps or limited access zones. Providing selective connectivity can improve satisfaction without undermining the sense of wilderness.

Deepen understanding of international markets: Current data show a dominance of domestic travellers in survey responses. To grow international visitation, SANParks needs further insight into source markets' motivations and behaviours, enabling more targeted marketing and product design aligned with their expectations.

Recommended citation: Slabbert, L. (2026). A market segmentation of overnight visitors to national parks. In A Decade of Learning: Tourism Research in SANParks (2015-2025) (pp. 82-88). South African National Parks.

Related internal report: Slabbert, L. (2019). Research report: Market Segmentation of Overnight Visitors to South African National Parks. South African National Parks.

SOUTH AFRICA'S NATIONAL PARKS AS A TOURIST DESTINATION FROM THE PERSPECTIVE OF THE NON-TRADITIONAL MARKET

Research conducted by MarkData in partnership with Consumer Conversations. Summary compiled by Liandi Slabbert.

Introduction

In 2016, SANParks commissioned MarkData and Consumer Conversations to investigate the perceptions and barriers faced by non-traditional tourists in visiting South African national parks. The research aimed to understand why these tourists, particularly Black domestic tourists from Gauteng, do not visit national parks and how SANParks can attract them.

Methods

Researchers used qualitative focus groups to explore perceptions of SANParks among domestic travellers who take at least one overnight leisure trip a year but had never visited a national park. Participants (ages 21-55; African, Coloured, and Indian; from Living Standards Measure categories 7-10) were recruited in Gauteng. Researchers ran one discussion with a holiday stokvel – (a savings / club of friends who pool money through the year and travel together as a group). The Stokvel group was included to introduce this community to SANParks and ensure parks become part of their holiday “consideration” set.

Discussions were run by moderators who matched the groups' profiles, in participants' preferred languages, at central venues with one-way mirrors so SANParks staff could observe. Sessions were audio/video recorded, transcribed verbatim (and translated where necessary). In addition to guided discussion, participants completed self-completion “collage” exercises depicting an ideal holiday and their perceptions of SANParks.

In total, 20 groups (5-8 people each; n=28) were conducted across Johannesburg/Pretoria.





Key findings

Low awareness and knowledge gaps

Across groups there was limited awareness of SANParks' mandate and product offering. This low baseline knowledge produced generalised images (e.g., grouping SANParks with "private game lodges"), which in turn seeded multiple misconceptions, such as being unaffordable.

Perceptions and misconceptions

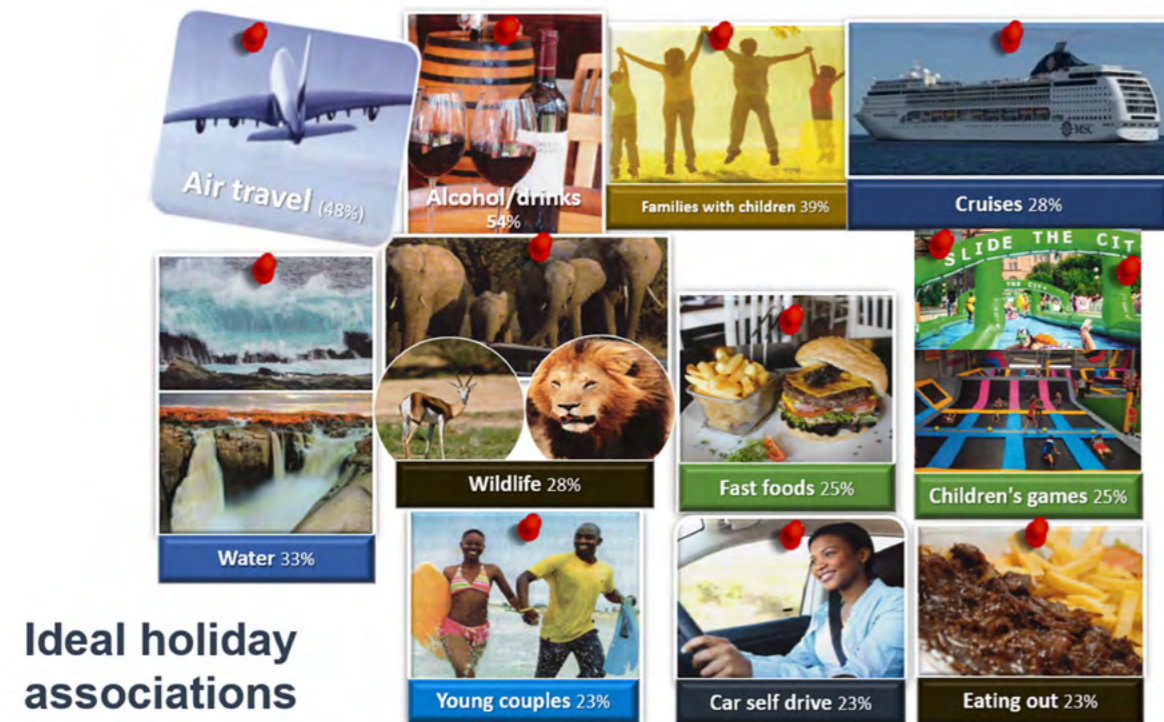
Many participants viewed SANParks as catering mainly to "foreigners" or "wealthier white tourists," often due to confusion between national parks and private game reserves, and assumptions that prices are set for dollar-spending visitors. Safety concerns also emerged, including misconceptions about wild animals roaming near accommodation, which further reinforced psychological and social distance from the brand.

Preferences and choice drivers

Price remains the strongest determinant of holiday choice. For families, facilities and activities for children are decisive. Many respondents preferred accommodation offering hotel-like comfort and convenience – such as Wi-Fi, DSTV, a refrigerator, and proximity to shops or entertainment – while some regarded thatched or self-catering units as a less desirable. Amenities and available activities were almost as important as accommodation itself, particularly for households travelling with children.

Expectations

Non-traditional visitors often anticipate boredom if the offer is "just game drives," and they expect SANParks to supply a clear daily itinerary / action plan with varied activities; communications should be explicit about costs. These expectations reflect a desire for structure, entertainment variety, and transparent pricing to reduce perceived risk.



A collage depicting the expectations of an ideal holiday among the non-traditional market studied (% of respondents choosing a particular category)

Ideal holiday associations



Further expectations of an ideal holiday among the non-traditional market studied (% of respondents choosing a particular category)

Management implications

The study recommends a focused, multi-pronged strategy to expand visitation from non-traditional markets. Awareness and perceptions should be addressed through targeted marketing that emphasises SANParks' affordability, diversity of experiences, and accessibility. This should be complemented by school and community outreach initiatives to build familiarity and affinity from an early age.

Enhancing the visitor experience is equally important. Upgrading amenities to align with contemporary expectations, such as family-friendly facilities and selected premium options, will broaden appeal across market segments. Introducing more cultural, recreational, and interpretive activities can enrich the experience for those seeking variety beyond traditional wildlife viewing.

Safety and comfort concerns should be proactively managed by communicating SANParks' safety protocols clearly and ensuring accommodation standards meet the needs of different visitor profiles, from families to luxury-oriented travellers. Investments in Wi-Fi and mobile connectivity, where feasible, will further improve convenience and align with the expectations of digitally connected guests.

Demand stimulation can be achieved through promotions and discounted packages targeting families and groups, as well as seasonal deals to encourage off-peak travel. Finally, partnerships with tour operators, local businesses, and surrounding communities will be essential to develop appealing packages, enhance the overall experience, and ensure that tourism benefits are shared more inclusively within local economies.

Recommended citation: SANParks (2026). South Africa's national parks as a tourist destination from the perspective of the non-traditional market. In *A Decade of Learning: Tourism Research in SANParks (2015–2025)* (pp. 89-91). South African National Parks.

SANPARKS BRAND AWARENESS ASSESSMENT

Research conducted by Ask Afrika in partnership with Urban Econ. Summary compiled by Liandi Slabbert.

Introduction

This study was commissioned to assess SANParks' brand awareness, perceptions, and overall appeal as a tourism offering among the broader South African public – particularly focusing on non-traditional and emerging market segments. The research aims to deliver evidence-based insights to strengthen SANParks' position as a preferred nature-based destination for domestic travellers. The objectives were as follows: first, to evaluate awareness and recognition of the SANParks' brand and its conservation and tourism offerings; second, to assess public perceptions, particularly in terms of affordability, accessibility, and desirability; third, to explore barriers to visitation, and the influence of information sources; and finally, to identify strategies that support market growth and future sustainability by attracting more diverse, younger, and first-time visitors.

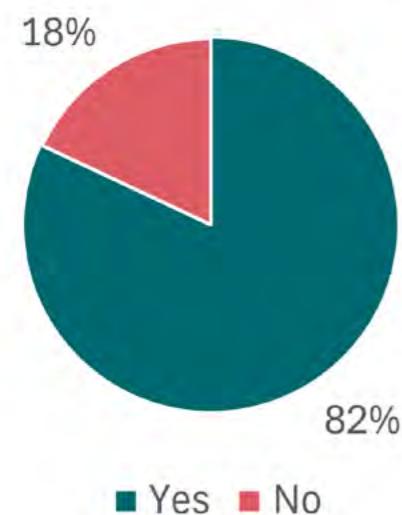
Methods

A quantitative survey approach was adopted, using a structured questionnaire distributed to a sample of 8 340 South Africans aged 18 and older. Data collection took place towards the end of 2024 and was conducted through a combination of online panel surveys (n = 5 792) and face-to-face (F2F) interviews (n = 2 548) to ensure demographic and regional representation. Sampling quotas were set based on income, age, location, and parental status to focus on respondents with the financial means to travel. Extensive quality control checks – including supervisor validations, and pilot testing – were implemented to ensure data reliability. The study sample included a racially diverse group (69% Black African, 15% White, 13% Coloured, 4% Indian/Asian), with 74% being parents – offering rich insight into the family travel market.

Key findings

Brand and logo awareness: 82% of respondents recognised the SANParks logo, but only 42% fully understood what SANParks stands for; 23% had never heard of it.

Are you familiar with the logo displayed below?



Awareness of individual parks

Awareness of individual parks varied widely among domestic respondents. Well-known parks such as Kruger, Table Mountain, Karoo, Garden Route, Mapungubwe and Addo Elephant recorded the highest levels of recognition, while smaller or more remote parks like Bontebok, Camdeboo, and Namaqua had much lower visibility. This highlights the need for targeted marketing efforts to increase awareness and promote a more balanced distribution of visitors across the broader SANParks' network.

Visitation patterns:

Kruger and Table Mountain dominate with the highest historical and recent visitation, while smaller parks remain largely unknown and under-visited.

Perceptions:

Visitors rate most parks highly for scenic beauty and enjoyment, but concerns remain around affordability, limited child-friendly activities, and inconsistent service.

Information sources:

Most people rely on digital platforms and word of mouth for travel planning. However, many still lack clarity about SANParks' government affiliation.

Conversion funnel:

High levels of park awareness don't always translate into visitation – highlighting a gap between brand recognition and action.

Management Implications

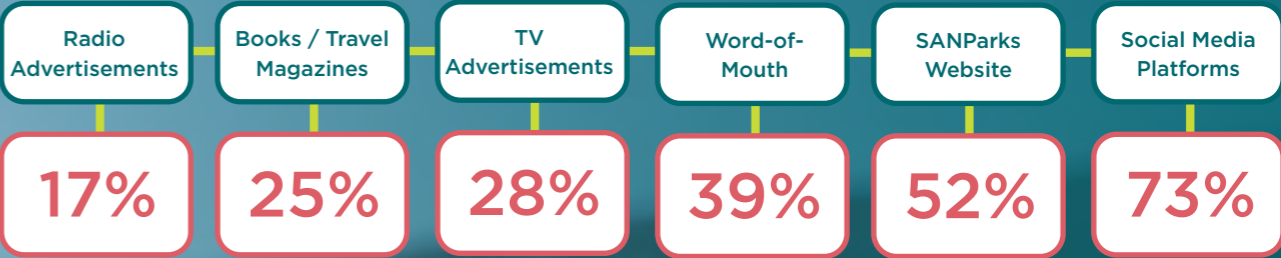
The SANParks' Brand Awareness study highlights several strategic priorities to guide future marketing and visitor engagement efforts. Firstly, SANParks should work to expand awareness beyond its flagship parks (such as Kruger and Table Mountain) by actively promoting lesser-known destinations and creating compelling stories around them. Strengthening public understanding of SANParks' mandate as a government-affiliated conservation agency is also critical to building trust and improving brand clarity, especially among new audiences.

Affordability and accessibility continue to be major barriers, suggesting the need for pricing flexibility, more inclusive packages, and enhanced visibility of low-cost nature experiences. With a large proportion of the market comprising families, there's strong justification for developing child-friendly infrastructure and educational programming to foster future loyalty. At the same time, SANParks should sharpen its digital presence by embracing social media storytelling and platform-specific marketing strategies to connect with younger, diverse segments. Lastly, visitor behaviour shows that most guests travel across multiple parks, underscoring the need for integrated marketing, cross-promotion, and loyalty initiatives that reflect the interconnected nature of park experiences.

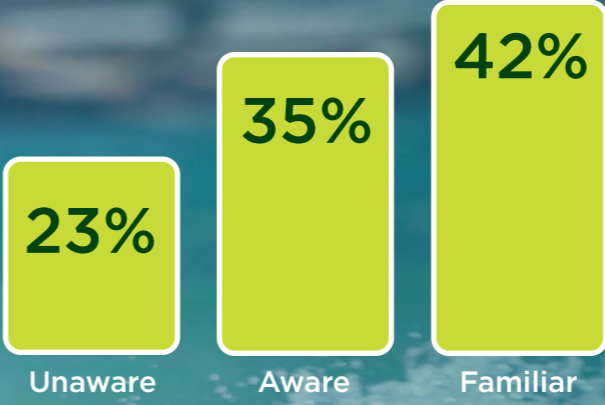
By implementing these recommendations, SANParks can enhance its brand awareness, increase visitor engagement, and strengthen its position as a premier nature-based tourism destination.



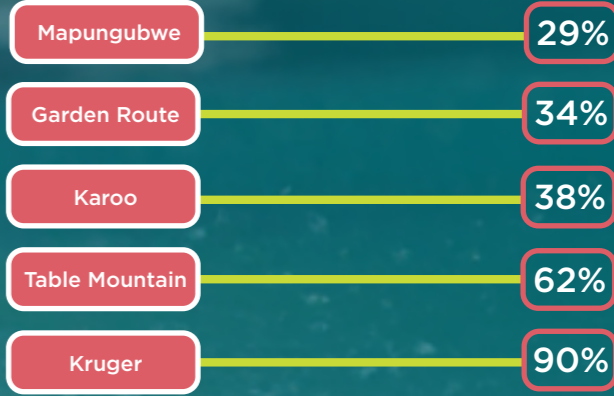
Where do visitors hear about SANParks?



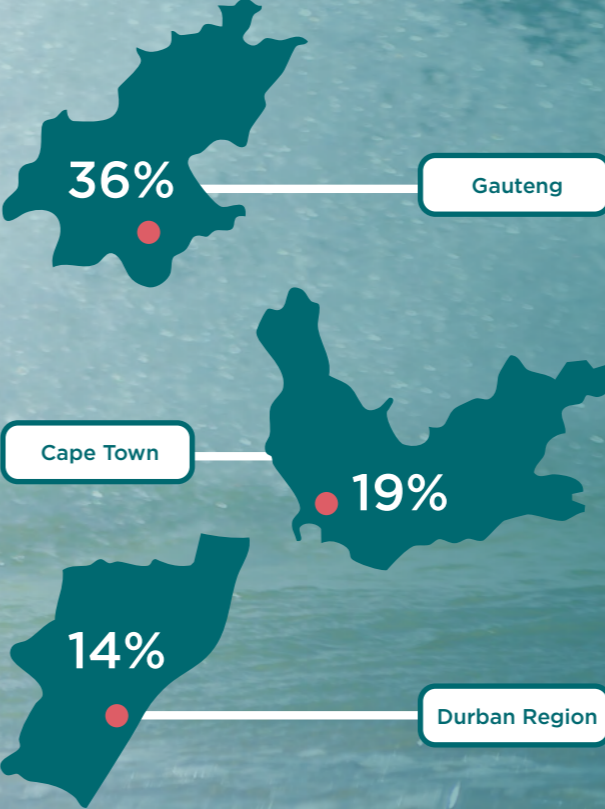
How aware are visitors of SANParks?



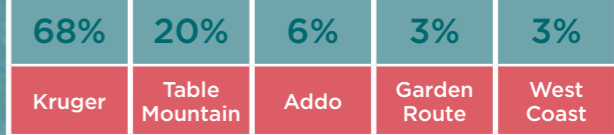
How familiar are visitors with SANParks?



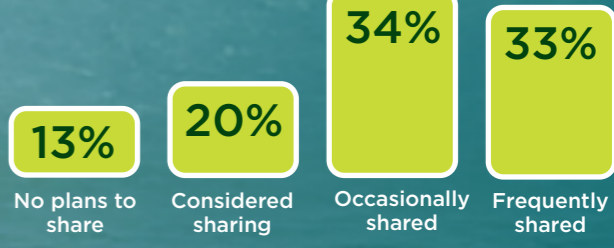
From which regions do they visit?



Where have they most recently visited?



Do they share their visit on social media?



Which platforms do they use?



Recommended citation: SANParks. (2026). SANParks Brand Awareness Assessment. In A Decade of Learning: Tourism Research in SANParks (2015–2025) (pp. 92-97). South African National Parks.

Photo: West Coast National Park taken by Rudolph de Girardier

BEYOND THE BIG FIVE: VISITORS' AND NON-VISITORS' PERCEPTIONS OF KRUGER NATIONAL PARK

Researchers: Karen Hughes, Pierre Benckendorff, Roy Ballantyne, Mucha Mkono, Faith Ong, Stella Echentille and Edward Hughes, University of Queensland.

Introduction

This study explores how current visitors and potential new audiences perceive Kruger National Park (KNP), with the aim of identifying opportunities to diversify and enhance visitor experiences. Amidst growing competition post-COVID-19 and the need to appeal to a broader demographic, the research examines not only the appeal of KNP's wildlife offering but also perceptions of its facilities, services, and potential for cultural experiences. The project is driven by SANParks' objective to sustain and grow KNP's appeal through a deeper understanding of what draws and deters various market segments.

Methods

A mixed-methods design explored perceptions of the KNP visitor experience: 1 904 visitor surveys went to KNP's own database (Oct–Nov 2022), and 596 non-visitor surveys were fielded in Jan 2023 to South Africans 18+ years who had visited a national park but not KNP. Complementing the survey data, 333 TripAdvisor reviews were subjected to both thematic and semantic analysis using Leximancer software to extract key sentiment and topic clusters. To contextualise the findings, desktop audits of other national parks in South Africa and abroad were also conducted.

Who participated?

The profile of KNP visitors revealed a predominantly domestic audience (83%), characterised by an older demographic with a median age of 63. Most were repeat visitors (98%), often travelling as couples, and typically staying for a median of six nights. The majority fell into the 'empty nesters' or 'older singles' life stages. In contrast, the non-visitor sample presented a younger profile, with a median age of 32. Around 64% were full nesters, or families with school-aged children, while 43% had children under 6 years of age.

Key findings

Visitor and non-visitor differences

- Visitors place significantly greater importance on core nature-based motives such as experiencing wildlife in its natural state, being close to nature, and enjoying the outdoors.
- In contrast, non-visitors rated motives such as learning about local culture, having a romantic holiday, and meeting other visitors as significantly more important than visitors did.
- Overall, the data indicates that visitors are primarily driven by ecological and restorative experiences, while non-visitors are more diverse in their motivations, with stronger interest in cultural, social, and leisure-oriented aspects.

Visitors' and non-visitors' motivations for visiting national parks

Motives	Visitors	Non-Visitors	t-value
Experiencing wildlife in its natural state	4.94	4.35	20.49***
Being close to nature	4.89	4.38	17.29***
Enjoying the outdoors	4.83	4.31	17.79***
Enjoying the scenery	4.79	4.39	13.43***
Escaping from everyday life	4.67	4.03	16.26***
Learning about the wildlife	4.58	4.29	8.47***
Somewhere to rest and relax	4.55	4.32	6.98***
Spending time with family or friends	4.15	4.35	5.00***
Feeling that I belong	4.07	4.04	0.71 (ns)
Learning about biodiversity	3.99	4.11	3.28 (ns)
Going on an adventure	3.97	4.29	8.64***
Reliving memories from past trips	3.97	3.86	2.52(ns)
Experiencing new things	3.96	4.37	11.29***
Learning about the landscape	3.93	4.08	3.84*
Learning about the plants	3.81	4.06	6.34***
Spending time on my own	3.73	3.82	1.83(ns)
Learning about the park's history	3.65	4.15	12.57***
Learning about local culture	2.83	4.05	27.69***
Having a romantic holiday	2.66	3.84	24.58***
Meeting other visitors	2.48	3.67	25.27***

Note *** = p < 0.001, * = p < 0.05, (ns) = not significant; Scale 1 = Not at all important...5 = Very important

Perceptions of national parks and KNP

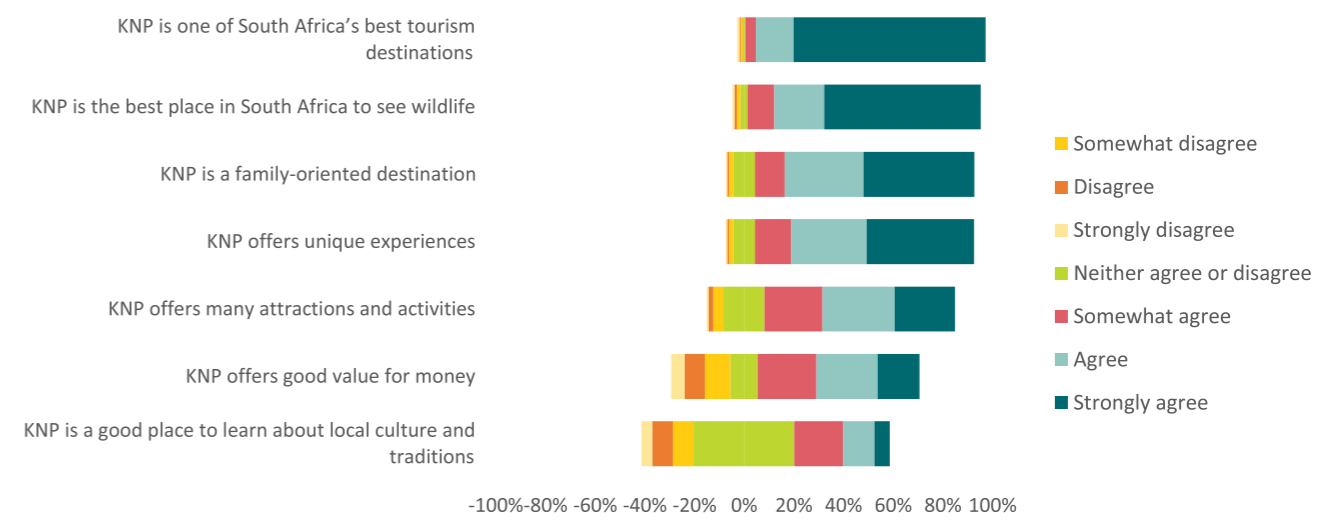
Visitors and non-visitors shared similar views on key factors influencing their choice of nature-based holidays, such as bird and wildlife variety, safety, atmosphere, well-maintained facilities, and affordability.

Visitors showed a stronger preference for immersive, self-directed experiences such as self-drives, wildlife viewing, sunsets, and barbecuing. In contrast, non-visitors placed greater value on guided walks, tours, bush braais, dining, and Big Five sightings – likely reflecting their limited prior exposure. Non-visitors showed moderate interest in wilderness trails, night-time activities, and cultural encounters, while visitors were generally less drawn to these. Although neither group prioritised activities like outdoor cinemas, exercise, or spa treatments, non-visitors rated them more favourably, highlighting opportunities to broaden KNP's appeal.

Both visitors and non-visitors rated KNP highly as a tourism destination. Visitors were in strong agreement that KNP is the best place to view wildlife in South Africa. Perceptions among visitors were more mixed regarding KNP's value for money and its role in promoting local culture and traditions, with a notable share of respondents either neutral or in disagreement.

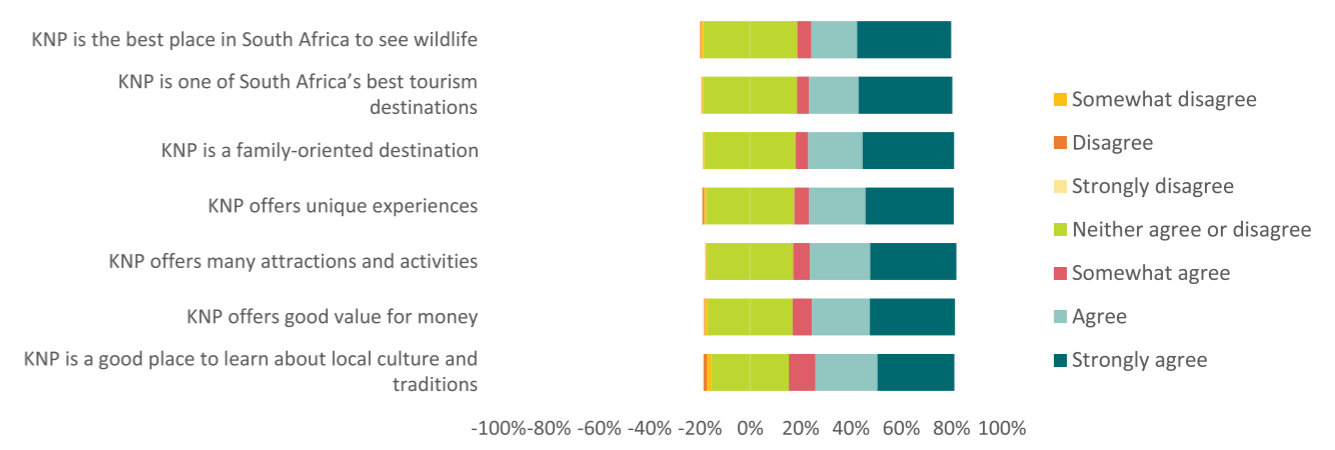


Photo: Kruger Shalati supplied by SANParks



Visitors' perceptions of KNP

Non-visitors showed consistently neutral responses across all items, indicating limited awareness of KNP's offerings. This is reinforced by the high proportion selecting "neither agree nor disagree." As with visitors, the weakest agreement was on KNP being a place to learn about local culture and traditions.



Non-visitors' perceptions of KNP

Interest in all new proposed activities differed significantly between visitors and non-visitors, with non-visitors consistently showing greater enthusiasm overall. Non-visitors rated cultural activities – such as traditional food tasting, cultural sites, crafts, performances, and guided tours highly. Both groups supported the idea of stargazing, while dining under the stars drew slightly less interest. These findings suggest cultural experiences may not resonate with current visitors but could be key to attracting and diversifying KNP's future visitor base.

Likelihood of participating in new visitor activities

Motives	Visitors	Non-Visitors	t-value
Dinner under the stars	4.79	5.66	23.84
Stargazing safari	4.76	6.18	21.71
Learn about traditional tracking and hunting techniques	4.34	5.88	20.25
Purchase locally produced art/craft or souvenirs	3.93	5.91	27.52
Visit a cultural site	3.51	5.98	34.26
Listen to locals tell their personal stories	3.35	5.63	29.27
Learn about or try traditional food	3.26	6.04	38.32
Visit an indigenous cultural centre or gallery	3.2	5.81	35.1
Go on a cultural tour with a local guide	3.02	5.81	35.98
See a traditional dance, music or cultural performance	2.9	5.86	38.66
Multi-day cultural hiking experience	2.71	5.9	43.92
Stay in community-based accommodation	2.42	5.38	37.58
Segway/electric bike tours	2.23	5.68	46.16

Note. All $p < 0.001$; Scale: 1 = Extremely unlikely...9 = Extremely likely

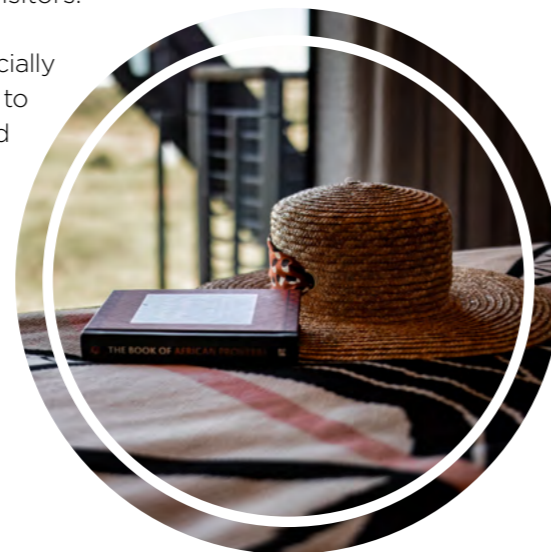
Management implications

To effectively meet the needs of both loyal return visitors and emerging markets, SANParks should adopt a multi-faceted approach to visitor experience and product development. Enhancing the self-drive infrastructure and improving access to wildlife viewing opportunities can significantly improve the overall experience for long-time guests. Simultaneously, upgrading accommodation and comfort-related amenities will ensure higher satisfaction levels across visitor segments.

Diversifying the product offering is equally important. SANParks could consider incorporating cultural elements into its visitor experience to appeal to non-visitors, while ensuring these additions do not compromise the expectations of current markets. Expanding guided experiences is another key strategy, as these are particularly attractive to first-time and younger visitors.

Connectivity and convenience remain critical, especially for potential visitors who prioritise access to Wi-Fi and mobile coverage. Addressing these needs in a phased and location-specific manner could bridge the gap between expectations and current offerings.

From a marketing perspective, targeted campaigns should address common concerns around safety and emphasise the availability of guided and cultural experiences. Lastly, SANParks should invest in ongoing visitor research and stakeholder engagement to ensure offerings remain relevant and responsive to evolving preferences.



Recommended citation: Hughes, K., Benckendorff, P., Ballantyne, R., Mkono, M, Ong, F., Echentille, S. & Hughes, E. (2026). Beyond the Big Five: Visitors' and non-visitors' perceptions of Kruger National Park. In A Decade of Learning: Tourism Research in SANParks (2015-2025) (pp. 98-102). South African National Parks.

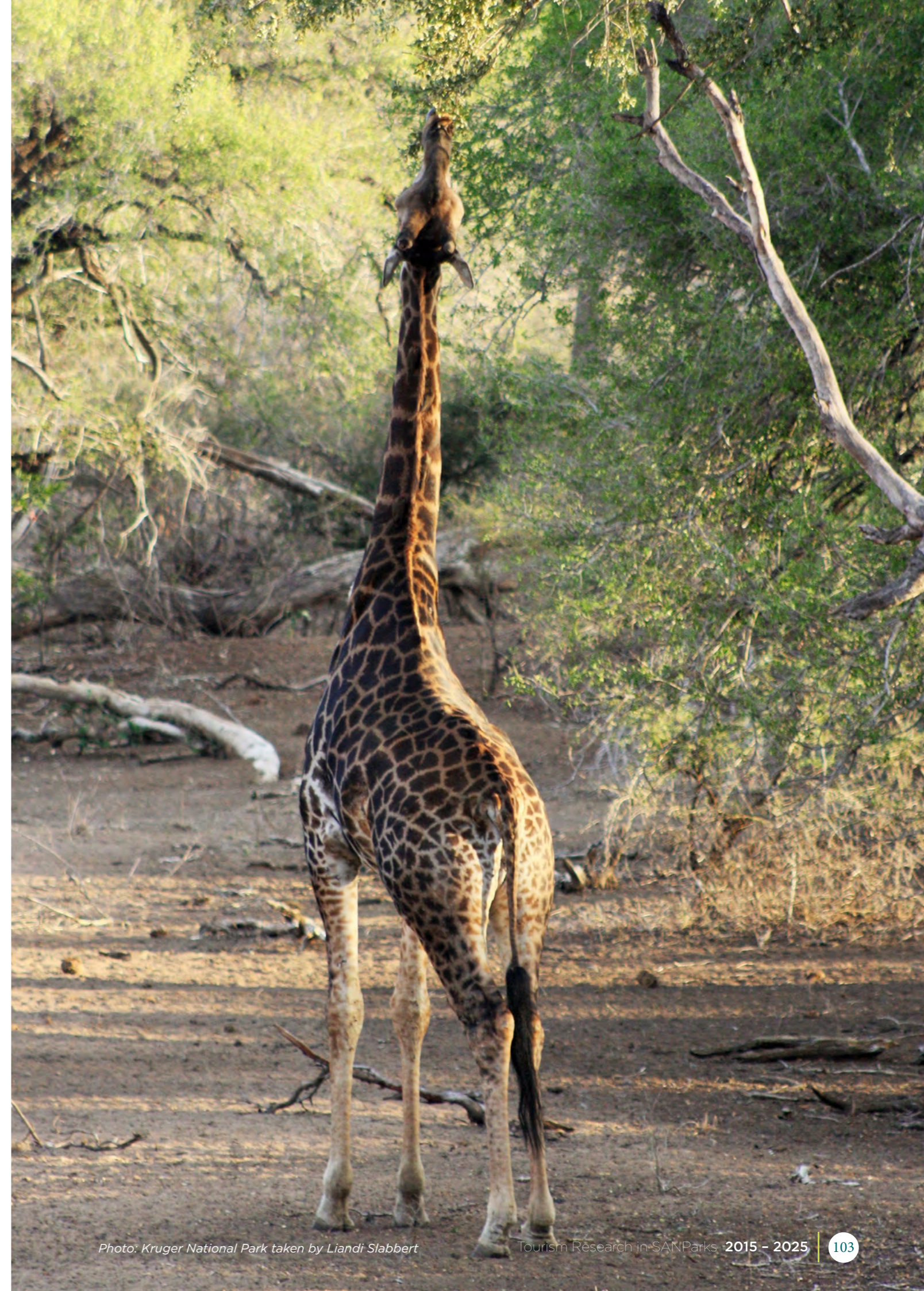


Photo: Kruger National Park taken by Liandi Slabbert

TOMORROW'S VISITOR – RESEARCHING POTENTIAL NEW MARKETS FOR SOUTH AFRICAN NATIONAL PARKS

Researcher: Liandi Slabbert, SANParks.

Following the COVID-19 pandemic, SANParks placed greater emphasis on exploring the potential of emerging visitor markets. During 2021 and 2022, several desk research initiatives were undertaken to assess the tourism opportunities presented by Generation Z travellers, Halal tourists, the Chinese market and visitors from West Africa.

Below is a high-level synthesis from multiple in-house studies to better understand the behaviours, needs, and perceptions of these markets and to guide SANParks' strategic marketing and product diversification

Generation Z

Gen Z, born between 1997 and 2012, is a hyperconnected, socially conscious, and diverse generation that places a premium on authentic experiences, personal growth, and environmental responsibility. While they currently have less spending power than older generations, they represent the fastest-growing travel market, with a strong interest in adventure, nature, wellness, and digital engagement. For Gen Z, travel is not a luxury but a key part of personal development and self-discovery, often guided by social media and peer recommendations.

To engage this emerging market, SANParks should focus on storytelling-driven digital marketing, easy-to-navigate online booking platforms, and immersive nature-based offerings that align with Gen Z's values. Emphasising sustainability, diversity, and wellness, while ensuring affordability and safety, will resonate deeply with this generation. SANParks could also experiment with influencer collaborations, augmented or virtual reality tools (AR/VR), and loyalty campaigns that invite Gen Z travellers to co-create content and become brand ambassadors through authentic digital experiences.



Photo: Garden Route National Park
taken by Rudolph de Girardier

Halal Tourism – Catering to Muslim travellers

The Halal tourism report highlights the steady growth of the global Muslim travel market, particularly from Indonesia, Malaysia, the Middle East and parts of Africa. These travellers place strong emphasis on faith-based needs such as Halal-certified food, prayer facilities, privacy in accommodation and culturally respectful environments. Although some parks, particularly Kruger National Park, already cater in part to self-catering Muslim travellers, the product offering remains limited and not well promoted.

From a marketing perspective, SANParks should clearly communicate its Halal readiness in promotional materials, improve staff awareness and sensitivity training, and collaborate with Muslim travel agents and online influencers. Practical measures such as providing prayer rooms, designated Halal menu options and cultural orientation materials would enhance visitor comfort and convey SANParks' commitment to inclusivity. Targeted investment in this segment could also help attract local Muslim travellers, a group that remains underrepresented in the current visitor profile.



Photos: SANParks

Chinese tourism market – High growth potential, high expectation

China is the world's largest outbound tourism market, with a rising middle class increasingly interested in experiential, eco-luxury and cultural travel. However, Chinese visitor arrivals to South Africa have not yet returned in significant numbers following the COVID-19 pandemic, remaining well below pre-2020 levels.

Tourist arrivals from China
2019-2025(July)



Despite the modest pace of recovery, the Chinese market remains a high-value growth opportunity for South African national parks. Key barriers include language differences, safety perceptions, visa requirements, and the limited availability of Chinese-friendly amenities, group-oriented experiences, and familiar payment methods within parks. Chinese tourists are typically attracted to iconic wildlife such as the Big Five, scenic beauty and safe, well-curated experiences. Management implications include adapting signage, guides and promotional materials into Mandarin; establishing partnerships with Chinese travel platforms; enabling WeChat payment compatibility; and developing short, guided tours that combine photographic, wildlife and cultural elements. Small-group packages with Mandarin-speaking guides and curated itineraries could serve as an effective entry point to this market.

West Africa (Nigeria & Ghana) – Limited current interest, long-term potential

At the time of the study, travel trends from Nigeria and Ghana showed that leisure travel to South Africa remains limited, with visits still focused mainly on shopping, business, and visiting friends and relatives. Arrivals from Nigeria are recovering slowly and remain well below pre-pandemic levels, although long-haul outbound travel from that country is projected to grow steadily over the next few years. In contrast, travel from Ghana is rebounding more rapidly, with a strong year-on-year increase in arrivals and growing interest in tourism partnerships with South Africa. Despite these encouraging signs, natural attractions such as national parks are not yet key motivations for either market, and destinations such as Kruger National Park rarely feature among top-visited sites. Urban luxury, dependable infrastructure that support comfort and convenience to travellers, shopping opportunities, and cultural familiarity remain strong drawcards. While these markets may not represent an immediate opportunity for nature-based tourism, longer-term potential exists in shifting perceptions and building awareness through targeted influencer campaigns, hosted media visits, and partnerships with West African travel agencies. Management should avoid major investment in direct marketing until visitation strengthens but can begin developing adaptable, family-friendly and urban-linked park products that are well positioned for future engagement.

Conclusion

The emerging markets explored in various smaller research projects offer distinct challenges and opportunities. For Gen Z and Muslim travellers, immediate adaptations to facilities, services, and marketing communication can unlock new demand. For Chinese and West African markets, a phased, partnership-driven approach will be essential. Central to all segments is a need for improved storytelling, digital integration, and awareness of the cultural and experiential preferences that define tomorrow's visitor.



Recommended citation: Slabbert, L. (2026). Tomorrow's visitor – Researching potential new markets for South African National Parks. In *A Decade of Learning: Tourism Research in SANParks (2015–2025)* (pp. 104-107). South African National Parks.



“ *Getting out of the house and travelling and exploring the National Parks has been incredible for us. We’re happier and more adventurous because of it. We’ve visited places we never really thought about going, just to check them out and see what’s there to see and experience. That’s been amazing for us.* ”

- SANParks visitor, 2022.

THE TRAVEL BEHAVIOUR OF THE DOMESTIC MILLENNIAL MARKET

Researcher: Anneli Douglas and Pierre Mostert, University of Pretoria.

Introduction

In tourism, the Millennials market represent a large consumer group with substantial current and future spending power. The purpose of this study was to explore the travel behaviour of South African Millennials (those born between 1981 and 1998), with a particular focus on their interest in nature-based holidays and their perceptions of South African National Parks as tourist destinations. The research examined various aspects of Millennials' travel habits, including short-term breakaway travel behaviour, motivations, destination preferences, activity and facility expectations, and media usage when planning holidays. It also sought to understand their likelihood of visiting national parks, which parks they are most interested in, and the reasons some may be hesitant to visit. Ultimately, the study aimed to identify how SANParks can better engage this important demographic through targeted marketing and experience design.

Methods

Conducted during the period 2018-2019, the study followed a mixed-methods approach in two phases. Phase 1 adopted a qualitative research design, using six focus groups with 54 Millennial participants representing different life-cycle stages (single adults, new couples, families with young children, and non-traditional markets). In addition, two short questionnaires were administered before and after the group discussions to capture respondents' trip behaviour, awareness of SANParks, and perceptions of different parks, with the combined data analysed through descriptive statistics and qualitative content analysis. Phase 2 adopted a quantitative survey design. An online questionnaire was distributed to a national panel of Millennials residing in four major metropolitan areas: Gauteng, Durban, Cape Town, and Port Elizabeth. Screening ensured that respondents were aged 22 - 39 years and held or were pursuing a tertiary qualification (to align with LSM 8-10). In total, 4 497 usable responses were collected. Data was analysed using descriptive statistics, exploratory factor analysis, t-tests, ANOVAs, and cluster analysis to identify patterns across demographic subgroups and segments.

Who responded to the online survey?

The respondent group was large, diverse, and representative of urban South African Millennials. Just over one third resided in Gauteng (33.5%), with the rest split across Cape Town (22.4%), Durban (22.4%), and Port Elizabeth (21.7%). The sample was racially diverse: 41.2% identified as African, 31% as White, 16.4% as Coloured, and 11.4% as Indian. In terms of gender, 55.1% were female and 44.3% male. Most respondents were young adults aged 22-30 (62%), with 38% between 31 and 39. The majority were single (52.9%), while 43.6% were married or living with a partner. Nearly 60% did not yet have children, while among those who did, most had one or two. Education levels were high, with 37.5% holding a degree, 25.8% a diploma, and 11.3% a postgraduate qualification. This profile highlights a youthful, educated, and demographically varied segment of South Africa's urban population.

Key findings

Results show that respondents typically take one to three short-break trips per year, usually lasting 1 - 3 days, and most often travelling with family, a partner, or friends. Their preferred accommodation includes hotels, resorts, and self-catering units, while budget options such as backpackers are less favoured.

The number of times a year that a week-end or short-break is taken	Total	African	White	Coloured	Indian
1-3 times	55.3	59.7	47.1	61.5	53.1
4-5 times	30.7	27.6	37.3	23.4	34.2
6-10 times	9.6	9.1	9.1	11.8	9.7
More than 10 times	4.4	3.7	6.5	3.3	2.9

Respondents show the strongest likelihood of visiting coastal destinations, resorts, and wildlife experiences, while sport, adventure, and cultural trips are less favoured.

Specific types of destinations	Highly unlikely	Unlikely	Neutral	Likely	Very likely	Mean
Adventure (e.g. hiking trip)	7.9	9.0	17.9	26.6	38.7	2.21
Boat cruise	6.0	9.8	12.8	29.0	42.5	2.08
City (e.g. Johannesburg, Cape Town, Durban)	4.1	5.7	10.9	29.8	49.6	1.85
Coast (beach / sea)	2.0	2.9	8.5	26.5	60.4	1.60
Countryside (e.g. Dullstroom; Parys - Free State)	4.7	9.1	19.6	30.4	36.2	2.16
Cultural (e.g. Cradle of Humankind)	5.0	8.8	21.4	30.6	34.2	2.20
Mountains (e.g. Drakensberg)	3.3	5.9	13.9	32.6	44.3	1.91
Nature (e.g. Tsitsikamma)	3.2	5.5	14.8	31.3	45.3	1.90
Sport and recreation (e.g. golfing at Fancourt or mountain bike races)	6.5	12.3	20.9	28.8	31.6	2.33
Resort (e.g. Sun City; Bela-Bela Forever Resort)	2.2	3.4	9.1	30.1	55.2	1.67
Wildlife (e.g. Kruger National Park)	2.9	4.2	12.8	31.3	48.7	1.81



The most important travel motivations are fun, rest, relaxation, and relief from work or study pressures. Activities such as sightseeing, trying local food, and adventure pursuits are popular, while fishing, cycling, and horse riding are less attractive. Desired facilities include good Wi-Fi, cell phone reception, and convenient access to shops.

When searching for information, Millennials rely heavily on Google, destination websites, and online reviews, while social media (e.g., Instagram, Twitter, Pinterest) plays a lesser role than expected. Price discounts, competitions, and giveaways are seen as the most effective marketing methods.

Respondents were asked to indicate how important certain destination choice factors are to them. The Likert scale points ranged from very important (1) to not important at all (5). Thus, the lower the mean, the more important the factor is perceived to be.

Destination choice factors	Not important at all	Of little importance	Neutral	Somewhat important	Very important	Mean
Safety against crime	1%	2%	5%	15%	77%	1.34
Accommodation should be reasonably priced	1%	3%	7%	22%	69%	1.45
Safety against wild animals	1%	2%	9%	20%	68%	1.47
Quality of the accommodation	1%	2%	7%	25%	65%	1.48
Ease of booking	1%	2%	7%	27%	64%	1.49
Opportunity to see and experience new things	1%	2%	8%	27%	62%	1.51
Opportunities for entertainment nearby	1%	3%	10%	27%	58%	1.62
Opportunities for sightseeing nearby	1%	3%	10%	29%	57%	1.63
Accommodation should have a beautiful view	1%	3%	11%	31%	54%	1.66
The destination should allow me to escape from the crowds	1%	4%	13%	30%	52%	1.72
The climate (temperatures and rainfall) of the destination should be at a comfortable level for me	2%	5%	14%	30%	50%	1.78
Opportunity to spend time in nature	1%	4%	16%	30%	49%	1.79
Accommodation should have received favourable reviews from other users on sites such as Tripadvisor, Sleeping-Out, Safarinow, Lekkeslaap, etc.	2%	4%	14%	30%	49%	1.79
Accommodation should have a good (official) Star Grading	2%	4%	16%	30%	49%	1.8
Accommodation should cater for families	3%	5%	14%	25%	52%	1.82
Opportunity to see wildlife	2%	5%	16%	30%	46%	1.88
Destination setting should be in my preferred "biome" (near the coast, in the mountains, Kalahari, etc.)	2%	5%	18%	31%	43%	1.93
Availability of activities that cater for children	7%	6%	13%	25%	50%	1.94
Destination should have a wilderness (rustic) feeling	3%	7%	22%	28%	40%	2.03
The destination should provide the opportunity to meet and socialize with other people	5%	10%	17%	28%	40%	2.11
Distance from home	7%	9%	17%	24%	42%	2.16

Safety (from crime and wild animals) and reasonably priced accommodation are most important, along with quality facilities and opportunities to escape crowds. Millennials express expectations of nature-based destinations offering beautiful scenery, peace, and novelty, but sustainability features such as renewable energy or green building practices are less influential.

Importantly, 80% of respondents indicated they are likely or very likely to visit a South African National Park. However, barriers include perceptions of high cost, lack of awareness of different parks, and the sense that they have "already been." Parks most likely to be visited for a weekend/short breakaway vary by metro: Gauteng Millennials favour Kruger NP, Cape Town Millennials favour the Garden Route NP, Durban Millennials were split between Kruger NP and Garden Route NP, and Port Elizabeth Millennials lean towards Kruger NP.

The results of a cluster analysis revealed distinct groups based on the likelihood of visiting national parks: one segment highly motivated by nature and strongly inclined to visit, and another segment with weaker motivations and a lower likelihood of visiting.



Management implications

Millennials value affordability, connectivity, and convenience alongside authentic experiences in nature. Management should therefore focus on pricing strategies and promotions that reduce perceptions of high cost while highlighting the value-for-money aspects of park stays. Marketing campaigns should be built around digital platforms that Millennials trust – particularly Google search optimisation, destination websites, and credible online reviews – rather than over-relying on social media.

Visitor communication should emphasise safety, scenery, and opportunities to relax and escape, while also showcasing engaging experiences such as food, culture, and adventure activities that align with Millennial motivations. Interpretation and storytelling could be adapted to highlight novelty and shareability rather than only educational value.

Finally, efforts should be made to raise awareness of the diversity of SANParks offerings, especially beyond Kruger NP, by positioning parks according to metro-specific preferences. Targeted campaigns, supported by competitions and giveaways, can attract repeat visitation and broaden destination choices. Engaging Millennials is essential for ensuring the long-term sustainability of SANParks' visitor base, making this research an important foundation for marketing and product development strategies.

Recommended citation: Douglas A., Mostert, P. (2026). The travel behaviour of the domestic Millennial market. In A Decade of Learning: Tourism Research in SANParks (2015–2025) (pp. 110–113). South African National Parks.

UNDERSTANDING THE EXPERIENCES AND MOTIVATIONS OF UNDERREPRESENTED DOMESTIC TOURISTS IN SOUTH AFRICA'S NATIONAL PARKS

Researchers: Julia Giddy and Clare Kelso, University of Johannesburg.

Introduction

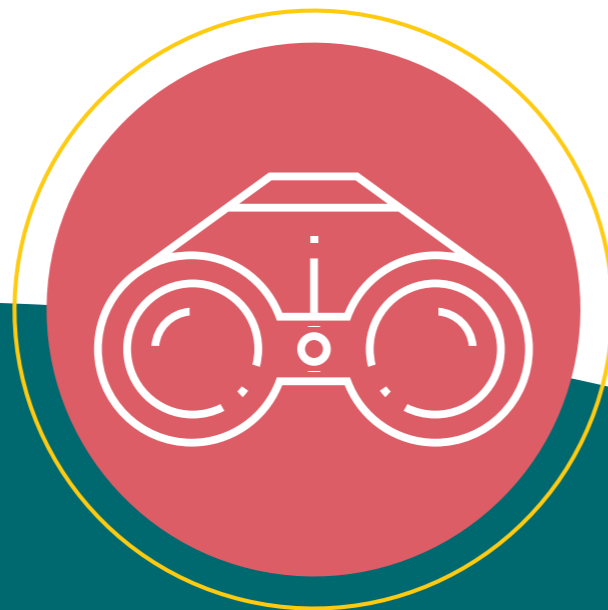
This research project set out to explore the motivations, experiences, and challenges faced by domestic South African tourists who have historically been less involved in nature-based tourism, particularly within the context of national parks. The aim was to generate insights into how South African National Parks (SANParks) and other tourism operators can better engage non-traditional tourist segments and promote inclusivity, repeat visitation, and deeper participation in nature-based experiences.

Methods

Research in 2023–2024 spanned Kruger and Mapungubwe National Parks using mixed methods. At KNP, 223 paper-based questionnaires were administered in person over three field rounds via purposive sampling. Descriptive statistics and thematic content analysis were applied, with field observations providing further insight. At Mapungubwe, 154 questionnaires were collected, alongside two key stakeholder interviews and ethnographic observations during a Heritage Day event. The study is ongoing, and data collection will be expanded to include other national parks.

Key findings

The research to date revealed that many non-traditional visitors were motivated by a desire to connect with nature, to enjoy quality time with friends and family and to do something new. Barriers to engagement included perceived exclusivity, limited day visitor facilities and concerns over costs which hindered broader participation. In the case of Mapungubwe, the role of African heritage emerged as a significant motivator for visiting the park as well as important in enhancing the experiences of visitors. The free access during SANParks Week played a significant role in increasing accessibility, particularly among those from neighbouring communities and school groups. Visitors often expressed enthusiasm about returning but highlighted the need for clearer information, better marketing, and more inclusive experiences.



Motivations of Non-Traditional Visitors to Kruger National Park	Mean	Std. Dev.
Being closer to nature.	4.50	0,881
Having a good time with friends.	4.45	1,349
Feeling a connection with South African nature.	4.43	0,725
Doing something new.	3.96	0,977
Relaxing.	2.64	1,315
Appreciating nature's beauty.	2.63	0,895
Feeling a connection with South African history	2.49	0,757
Seeing unique animals.	2.45	1,556
Discovering new things about nature.	2.42	1,107
Learning more about South African history.	2.38	1,173
Seeing the Big 5.	2.33	0,638
Being able to tell my friends that I did something unique.	2.30	1,173
Meeting new people.	2.28	1,304
Getting away from crowds and be with just a few people.	2.24	0,856
Experiencing wildlife in its natural state	2.23	0,881
Posting pictures on social media.	2.03	1,349

Management implications

To support broader and more inclusive access to national parks, management should consider enhancing accessibility through targeted campaigns and affordable travel options, particularly during off-peak periods when capacity is available. Offering incentives such as discounted rates, transport partnerships, or bundled experiences could reduce cost-related barriers and encourage uptake from a wider range of domestic travellers.

Expanding marketing efforts to reach non-traditional markets is equally important. This includes developing culturally relevant messaging and providing multilingual materials that speak to the values, preferences, and identities of different segments of the population. Free access weeks provide an important entry point for first-time visitors and could be strategically leveraged to build long-term engagement by introducing tailored loyalty programmes that encourage repeat visitation.

On-site interpretation and signage should be improved to ensure that the park environment feels welcoming and educational, particularly for those who may not be familiar with traditional park offerings. First-time visitors are more likely to feel at ease and return if they encounter clear information, friendly orientation points, and meaningful opportunities to engage with the park's stories.

Lastly, management should prioritise inclusivity by partnering with community ambassadors, investing in staff training focused on diverse visitor needs, and diversifying accommodation and experiences to reflect South Africa's multifaceted domestic market. This means offering a broader range of lodging options, guided and self-guided activities, and events that appeal to varied cultural interests, travel styles, and group types.



Kruger National Park Research Team (Moses Molestane, Julia Giddy, Kamogelo Mafete, Lebohang Mofokeng & Thinavuyo Makhurupetsi).



Mapungubwe Research Team (Kedibone Mathaba, Lebohang Mabothe, Julia Giddy, Clare Kelo & Kamogelo Mafete).



Tour guide Johannes at the Mapungubwe Heritage Site.



Mapungubwe Decedents Annual Heritage Event.



Student Fieldworkers Luyanda Radebe and Karabo Lunguza on Mathekenyane Viewpoint at Kruger National Park.



Recommended citation: Giddy, J.K. & Kelso, C. (2026). Understanding the experiences and motivations of underrepresented domestic tourists in South Africa's national parks. In A Decade of Learning: Tourism Research in SANParks (2015-2025) (pp. 114-117). South African National Parks.

Related article: Giddy, J.K. & Kelso, C. (Accepted). Inclusivity for Resilient National Parks Tourism in Post-Apartheid South Africa. Submitted to Tourism Planning and Development.

STARGAZING FOR SUSTAINABILITY - TURNING NIGHT SKIES INTO CONSERVATION REVENUE

Researchers: Amélia S. Wassenaar and Brenda A. Coetzee, University of the Free State

Introduction

Astrotourism, a form of nature-based, special-interest tourism centred around celestial observation, is growing globally in response to increased environmental consciousness and the desire for meaningful, low-impact travel experiences. Imagine lying on your back in the Karoo, surrounded by complete silence, as millions of stars stretch across an unpolluted night sky – a view that city dwellers may never experience. Given the prevalence of dark skies in South African National Parks (SANParks), this study investigates the potential for astrotourism as a sustainable, income-generating activity within these parks. The research addresses a notable gap in both global and local literature regarding the feasibility, motivation, implementation and operational frameworks for astrotourism in protected areas. It offers strategic direction to the management of SANParks and provides comprehensive practical input to implement astrotourism activities.

Methods

This mixed-method exploratory study combined both qualitative and quantitative approaches to investigate the potential of astrotourism in SANParks. The qualitative component included 62 international and local case studies and 42 semi-structured interviews with astrotourism operators, astronomy experts and SANParks staff. The quantitative element consisted of an online survey completed by 1150 respondents from 33 countries, including SANParks visitors, members of astronomy societies and members of the public with an interest in nature-based tourism or astronomy. Participants represented a broad cross-section of stakeholders. Across the sample, there was a strong indication of environmental consciousness and a notable interest in sustainable and nature-based travel experiences.

Key Findings

Interest and motivation

There is ample evidence that artificial light pollution can harm human health and ecosystems and a definite need for policies that will protect the night skies exists. While individuals are willing to prevent light pollution, they often lack the know-how. The tourism industry has the unique opportunity to not only limit light pollution within parks, but also to create awareness of the negative impact of indiscriminate use of light at night. Interested respondents' knowledge ranged from having no knowledge to having a high level of astronomy knowledge. Consequently, motivation for participation in astrotourism activities varied from being motivated by the nature experience, a general appreciation for the night sky and a profound interest in astronomical events.

Viability and willingness to pay

Respondents showed a willingness to pay for quality stargazing experiences, especially those including expert interpretation and telescopic access. The preferred activity would include a short game drive to the stargazing site, a brief, informative presentation and sufficient time for stargazing. Although all activities should be educational in nature, activities should be planned to meet the different needs of visitors based on their knowledge of astronomy.

Suitable locations

The remoteness of many parks provides ideal destinations to offer high-quality astrotourism opportunities. Astrotourism is especially recommended in the arid parks, particularly Tankwa Karoo National Park, Karoo National Park, Kgalagadi Transfrontier Park and Meerkat National Park. They were identified as ideal locations due to their remoteness, low levels of light pollution and pristine night skies. While arid parks often have the best quality night skies for astronomical observations and activities, various activities can be adapted and presented successfully in parks with high visitor numbers. The unique circumstances of each park should be considered to develop appropriate activities.

Operational considerations

From all the aspects that were considered to make an astrotourism activity memorable, it was agreed that knowledgeable guides were indispensable. Though parks should make use of astronomy experts for more specialised events, it is essential that guides who present astrotourism activities are well-trained and adept to provide quality experiences. Community support to protect the night sky should be sought when developing activities. Suitable equipment should be available – typically 8–12-inch telescopes with computerised mounts should be sufficient. A key success factor is authenticity and educational value – participants were averse to overly commercialised products.

Management Implications

Astrotourism presents a strategic opportunity for SANParks to align with its objectives of promoting sustainable, low-impact tourism while broadening the scope of visitor experiences. Given South Africa's unique geography, astrotourism activities should be customised to the specific characteristics of each park – particularly those in arid, low-light areas ideal for stargazing. To guide implementation, a four-component operational astrotourism model is proposed. The environmental component prioritises conservation of dark skies and light pollution mitigation through management policies, educational awareness and community engagement. It encourages conservation-friendly practices to ensure ecological integrity through low-impact activities. The economic component considers the viability of astrotourism experiences to generate conservation revenue, assessing demand and willingness-to-pay. The visitor experience component emphasises visitor motivations to participate in what they consider meaningful activities and highlights preferred activities from a tourist perspective. Finally, the implementation component includes the identification of suitable locations, seasonality, interested visitor profiles, staff training and local astronomer collaboration to present activities and logistics related to essential infrastructure and equipment.

For long-term success, clear policies are needed to protect dark skies, especially around park buffer zones. Infrastructure investment in shielded lighting and designated observation areas will further support the development of astrotourism in a way that enhances SANParks' visitor offerings while maintaining its conservation mandate.

Recommended citation: Wassenaar, A.S. & Coetzee, B. (2026). Stargazing for sustainability - turning night skies into conservation revenue. In A Decade of Learning: Tourism Research in SANParks (2015-2025) (pp. 118-120). South African National Parks.

Related thesis and articles:

Wassenaar, A.S. (2021). Astrotourism as an income-generating opportunity in South African National Parks. Doctoral thesis (publication pending). Bloemfontein: University of the Free State.

Wassenaar, A. & Coetzee, B. (2024). Global astrotourism initiatives and the applicability of their strengths, weaknesses, opportunities and threats to astrotourism in South African National Parks, Journal of Outdoor Recreation and Tourism 46 (100766). <https://doi.org/10.1016/j.jort.2024.100766>

Wassenaar, A.S. & Coetzee, B.A. (2025). Viability of astrotourism in South African National Parks as a revenue source for conservation, Koedoe 67(1), a1840. <https://doi.org/10.4102/koedoe.v67i1.1840>

THE POTENTIAL FOR GEOTOURISM AT THE KRUGER NATIONAL PARK FOR SOCIAL SUSTAINABILITY

Researcher: Khodani Matshusa, University of Johannesburg (at the time of the study)

Current affiliation: University of South Africa.

Introduction

Focusing on the northern KNP, the work assesses geotourism as a complementary product to wildlife tourism and considers its capacity to promote social sustainability via employment, reduced poverty and enhanced community involvement. Despite KNP's rich geoheritage and proximity to disadvantaged communities, geotourism has not been developed or researched extensively. This study addresses this gap, proposing geotourism as a sustainable alternative that integrates geology, culture, education, and conservation.

Methods

A four-phase mixed-methods design was used to explore the potential for geotourism development in the northern region of Kruger National Park. In Phase 1, the researcher identified and evaluated 15 geoheritage sites using six indicators – geotourism value, cultural significance, ecological sensitivity, accessibility, development requirements, and academic presence – mapped spatially with Geographic Information System (GIS) to prioritise key areas for development. Phase 2 involved 16 semi-structured interviews with stakeholders from SANParks, local communities, government, tourism education, and tour operators to gather diverse perspectives. Phase 3 consisted of an online survey that attracted 105 valid responses from participants of various ages, income, and education levels – many of whom were familiar with Kruger but lacked awareness of geotourism as a concept. In the final phase, findings from both qualitative and quantitative components were integrated to highlight areas of alignment and divergence in stakeholder perceptions, offering a comprehensive understanding of opportunities and challenges for geotourism in the region.

Key findings

Geotourism potential

The northern region of Kruger National Park holds immense geotourism promise, with significant geological and cultural features such as the Pafuri Triangle, unique rock formations, archaeological sites, and ancient cultural artefacts. Although most of these geoheritage sites remain undeveloped, they are recognised as highly valuable for both their tourism and cultural significance, making them ideal for responsible tourism development.

Stakeholder and community support

There is strong backing for geotourism among local stakeholders, particularly community members who see it as an opportunity for economic upliftment. Local leaders highlighted the importance of inclusive planning processes and fair benefit-sharing mechanisms to ensure that geotourism supports long-term community well-being and participation.

Visitor interest and willingness to pay

The study revealed high levels of interest among visitors in geotourism activities, especially those that blend cultural, educational, and adventure experiences. Many expressed willingness to pay for guided geotours, particularly those lasting one to three hours and priced affordably, indicating demand for well-packaged, interpretive experiences.

Potential benefits of geotourism

Geotourism presents various advantages. Socio-economically, it can stimulate income generation, foster small businesses growth, and improve local livelihoods. Educationally, it offers avenues for research innovation, awareness, and skills development while promoting appreciation for geological heritage. Environmentally, it encourages preservation of biodiversity and sensitive sites through managed access, visitor education, and reinvestment of tourism revenue into habitat restoration, site monitoring, and conservation staffing. These increased conservation efforts help protect fragile geological and ecological features while ensuring that tourism remains sustainable.

Barriers to development

Despite its promise, geotourism faces notable challenges. These include a lack of enabling infrastructure such as roads, signage, and interpretive centres; limited marketing and public awareness; concerns around safety and access restrictions at key sites; and the absence of sufficient funding and coordinated stakeholder efforts to drive development forward.

Management implications

Geotourism should be formally recognised and introduced as part of SANParks' tourism portfolio, particularly in the northern region of Kruger National Park. Its development aligns with national strategic priorities, including South Africa's National Development Plan and the Sustainable Development Goals, especially those related to poverty alleviation and sustainable economic growth.

To ensure its success, the development process must be inclusive and participatory, with strong involvement from local communities at every stage – from planning and implementation to long-term management. Building local capacity through training programmes for youth, small businesses, and prospective tour guides in geotourism interpretation will be critical to generating employment and empowering communities.

A supportive policy and infrastructure framework is also essential. This includes the creation of a national geoheritage sites database and targeted investment in essential infrastructure such as trails, signage, and safety measures. Marketing strategies must be developed to build awareness and attract visitors. Effective geotourism development will also depend on strong collaboration between SANParks, government departments, NGOs, academic institutions, and local stakeholders.

For long-term sustainability, it is important to embed social sustainability principles into park management strategies. Monitoring systems should be put in place to assess impacts on local livelihoods, the preservation of geoheritage sites, and visitor satisfaction, ensuring that the benefits of geotourism are sustained for future generations.

Recommended citation: Matshusa, K. (2026). The potential for geotourism at the Kruger National Park for social sustainability. In A Decade of Learning: Tourism Research in SANParks (2015–2025) (pp. 122–125). South African National Parks.

Related thesis: Matshusa, K. (2020). The potential for geotourism at the Kruger National Park for social sustainability. University of Johannesburg (South Africa).<https://hdl.handle.net/10210/456782>.



Photo: Mapungubwe National Park taken by Rudolph de Girardier

(Photos: Khodani Matshusa)



Mashikiri sandstone cave with rock art lines inside the cave showing the potential presence of ancient hominids. The cave is also a shelter and shade for wildlife, particularly during winter and summer respectively.



Makahane hill, presenting stalactites formation and potholes within the cave; ancient stone tools; geological structures such as magnificent layering, ripple marks, sediment deformation, joints, and faults; and dinosaur bones.



A general view of Thulamela hill where a historical settlement for the Venda kingdom was constructed using sandstones with potential for guided geotours. The site shows massive sedimentary beddings; glass beads and seashells; and original rocks used for grinding by the Vhavenda people.

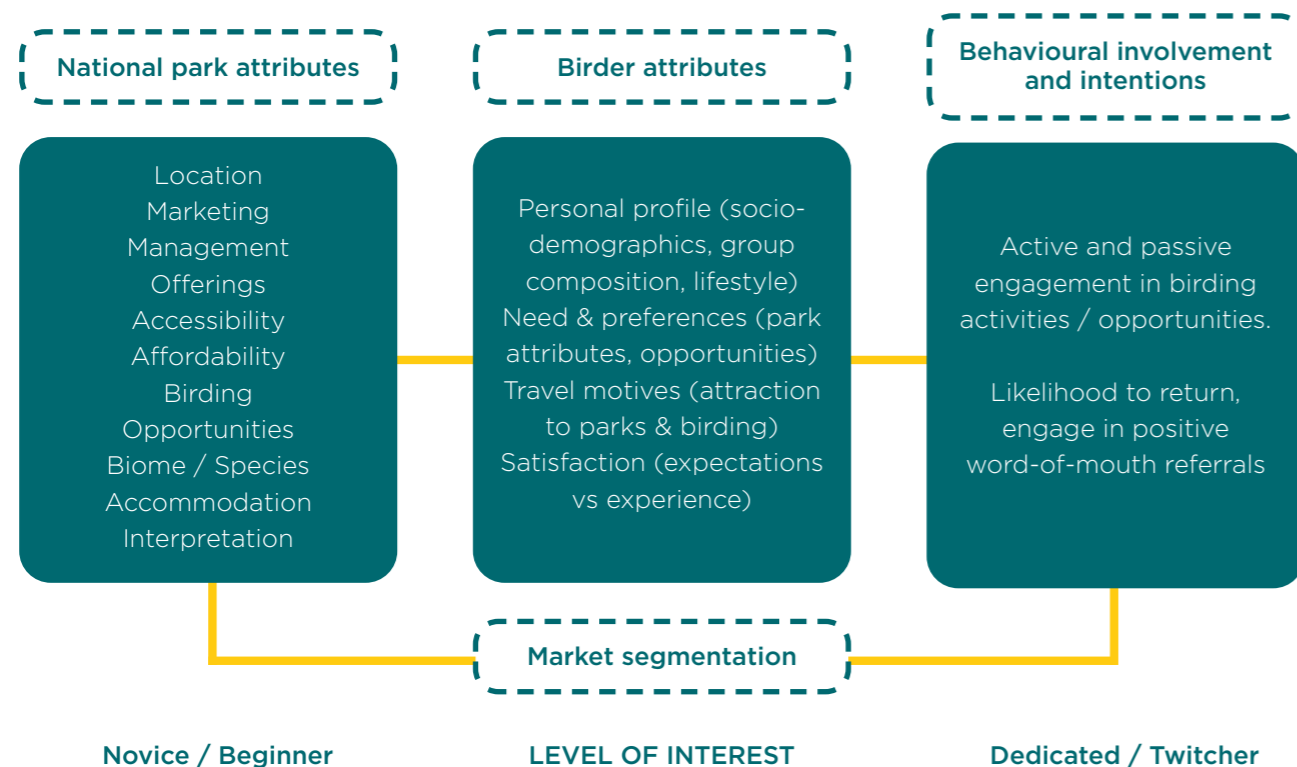
A MARKETING ANALYSIS OF AVI-TOURISTS TO SOUTH AFRICAN NATIONAL PARKS

Researcher: Martinette Kruger and Adam Viljoen, North-West University.

Introduction

South Africa hosts approximately 10% of the world's bird species, making it an ideal location for avitourism – a niche tourism segment focused on birdwatching. Despite the country's diversity of avifauna and habitat-rich national parks, few authors had previously explored birding within these protected areas. This study aimed to gain a deeper understanding of the profiles, motivations, and preferences of birders visiting South African national parks, with the goal of enhancing birding-related tourism offerings and management strategies.

The figure below conceptualises avitourism in this setting, illustrating how birder characteristics, such as socio-demographics, preferences, experiences, and group composition, interact with park attributes, including location, biome, bird species, interpretation offerings, and accommodations, to shape participation. International studies highlight birders' diverse travel expectations, including the quality of species, knowledgeable guides, birder-friendly facilities, and complementary activities, and point to multiple typologies. However, consensus typically converges around three core segments: casual, intermediate, and committed birders. Understanding these segments is vital, as behavioural involvement - the intensity of effort invested in birding - directly influences decision-making, financial commitment, and behavioural intentions such as loyalty, repeat visitation, positive word-of-mouth, and conservation engagement. Identifying birder involvement and segmenting the market, therefore, provides a foundation for predicting and influencing future behaviour, positioning avitourism as a strategic growth area for SANParks.



Conceptualising avitourism in South African national parks

Source: Kruger and Viljoen (2023)

Methods

An online questionnaire was distributed between May and September 2018 via the SANParks website, SANParks' social media pages, and the social media platforms of BirdLife South Africa. A total of 307 responses were received and incorporated into the analysis. Data analysis focused on demographics, travel motivations, spending, satisfaction with birding services, and behavioural preferences.

Who were the visitors who participated?

Most respondents were South African residents (95%), with a small proportion of international visitors (5%) originating from the United Kingdom, Germany, France, the Netherlands, and Sweden. Within the South African sample, 62% were from Gauteng, while the remaining 43% comprised respondents from other provinces and abroad. The remaining provinces and international respondents were distributed as follows: Western Cape (12%), Mpumalanga (10%), KwaZulu-Natal and foreign visitors (5% each), Eastern Cape and Limpopo (3% each), and North West and Free State (2% each). The respondent profile revealed a predominantly male sample. Most Gauteng birders (44%) and residual birders (45%) fall within the 50-64 age category. Overall, Gauteng birders tend to be slightly older on average than their residual counterparts. Most respondents were English or Afrikaans speakers, with the majority holding undergraduate or postgraduate degrees. Income levels were also notably high, particularly among the Gauteng cohort, with a substantial share earnings over R772,001 per annum. Loyalty to SANParks was evident, with 87% of respondents in Gauteng and 86% of the residual group holding valid Wild Cards.



Photo supplied by researchers

Visitation patterns and behaviour

- Kruger National Park is the most frequently visited birding destination (Gauteng 75%; residual 61%).
- Residual birders spread their visits across a wider range of parks, including Kgalagadi, Garden Route, and West Coast.
- Both Gauteng (93%) and residual birders (90%) show high intention to revisit parks, with strong willingness to recommend visits (83% for both groups).
- Most respondents travel with a spouse or partner (Gauteng 38%; residual 45%). Gauteng birders are more likely to travel with friends (25% vs 13%).
- Spending: Residual birders spent more (R14,697 excl. foreigners) than Gauteng birders (R10,537).
- Motivations:
 - » Experiencing animals in their natural environment is the top motivation (Gauteng 4.78; residual 4.85).
 - » Viewing bird species and appreciating endangered wildlife are also highly valued.
 - » Residual birders place greater emphasis on photography and pursuing birding passions.

Awareness and evaluation of park birding opportunities

- A quarter of respondents became aware of birding opportunities through previous park visits. Other key awareness channels include word-of-mouth and birding associations (15%), as well as SANParks Honorary Rangers (10%).
- A consistent gap exists between the importance birders place on certain experiences and their satisfaction with what is offered. Greatest shortcomings relate to:
 - » Quality and availability of bird hides.
 - » Lack of unique birding experiences.
 - » Limited opportunities for research and interpretation services.
 - » Residual birders specifically highlighted the absence of interpretation centres.

Birding-related behaviour

- Gauteng birders are more inclined to buy guidebooks, track sightings, watch birding programmes, and travel to known birding destinations.
- Residual birders show stronger interest in photography, purchasing guidebooks, and involving family and friends in birding activities.

Birding-related offers and experiences

- Both groups expressed strong interest in dedicated birding drives as an alternative to game drives (Residual 85%; Gauteng 83%).
- While satisfied with existing birding supplies such as birding books and guides, respondents felt prices of these items were too high, suggesting a price for local residents would be well received.
- Additional supplies requested: wider variety of birding books (especially Sasol guide), T-shirts, bird puzzles, artwork, binoculars.

GAUTENG	TRAVEL MOTIVATION	OTHER PROVINCES AND ABROAD
4.78	To experience animals in their natural habitat	4.85
4.71	The opportunity of viewing a variety of bird species in their natural habitat	4.68
4.65	To appreciate endangered birds and wildlife	4.60
4.20	To photograph birds and wildlife	4.55
4.45	To actively pursue my birding passion	4.55
4.63	To relax and escape from my daily life	4.53
4.57	To gain knowledge about birds and wildlife	4.52
4.61	National park visits contribute to my overall well-being	4.52
4.53	National park visits form part of my lifestyle	4.50
4.19	To spend time with family and friends	4.13
4.19	To participate in birding activities (tours/trails)	4.07
4.14	To explore a new destination	3.98
3.91	Parks provide affordable and value-for money experiences	3.78
3.82	To visit the main bird attractions (e.g. Big 6 birds in Kruger NP)	3.77
3.91	To volunteer (SANParks Honorary Rangers)	3.72
3.12	To partake in novelty visits/new trends	2.94

Who are SANParks Birders?

Recent research¹ provides a robust typology of SANParks' birders segmented into three clusters based on behavioural involvement. **Casual birders** represent the largest and oldest group, demonstrating loyalty to SANParks but showing lower involvement in specialised activities. **Intermediate birders** exhibit moderate involvement and represent a key growth market, with the potential to transition into more engaged participants through targeted education, events, and outreach. **Avid birders**, while the smallest segment, are the youngest and highest-value group, showing the greatest expenditure, particularly on conservation fees, accommodation, and donations. They also demonstrate the strongest interest in premium and specialised offerings.

Five behavioural involvement pursuits

Five validated behavioural pursuits underpin the typology of SANParks' birders. **Travel and sharing pursuits** involve birders travelling specifically for birding and sharing experiences with others. **Passive consumer pursuits** reflect the consumption of media and products linked to birding. **Leisure and conservation pursuits** refer to integrating birding with broader leisure activities and support for conservation. **Knowledge and participation pursuits** capture the desire to learn, engage in educational activities, and actively participate in birding-related experiences. Finally, **active engagement pursuits** reflect volunteering, guiding, and contributing to citizen science.

Insights for SANParks

Casual birders ensure stable visitation and loyalty, while Intermediate birders are primed for growth and represent an opportunity to develop into more engaged participants. Avid birders, although smaller in number, are high-spend niche visitors who require premium products and tailored experiences. Across segments, birders expressed strong interest in bird species trips, hides, interpretation centres, and research opportunities. However, current satisfaction levels fall short of perceived importance, with particular gaps in the quality of bird hides, the uniqueness of experiences, and the interpretive content of centres. Addressing these gaps presents a clear opportunity for SANParks to strengthen its avi-tourism appeal.

¹Kruger, M., & Viljoen, A. (2023). Bird (er) s of a feather? A typology of birders to South African national parks based on their behavioural involvement. *Annals of Leisure Research*, 26(1), 1-26.



Recommended citation: Kruger, M & Viljoen, A. (2026). A marketing analysis of Avi-Tourists to South African National Parks. In A Decade of Learning: Tourism Research in SANParks (2015-2025) (pp. 126-130). South African National Parks.

Related article: Kruger, M., & Viljoen, A. (2023). Bird (er) s of a feather? A typology of birders to South African national parks based on their behavioural involvement. Annals of Leisure Research, 26(1), 1-26.

Management implications

Birding presents an important yet underdeveloped opportunity for SANParks to grow avi-tourism and diversify its tourism revenue base. To capitalise on this, management should strengthen interpretation and learning by reinvesting in interpretation centres, guided birding trails, and hides that function not only as vantage points but also as educational hubs. Developing a national birding route could raise the profile of lesser-known parks, while improving infrastructure, such as hides, would enhance comfort and provide richer interpretive content. Building on the work of the SANParks' Honorary Rangers, the introduction of a standardised manual and consistent pricing for birding weekends would ensure both quality and accessibility across parks.

At the same time, the broader tourism value of birding should be leveraged through the marketing of unique species and inclusive activities that appeal to birders and their families, thereby increasing group travel and spending. Technology and citizen science offer further opportunities for engagement. Parks can involve birders in data collection through observation banks, competitions, and interactive birding apps that provide species information and support life-listing and uploads. Local communities should also be empowered through training as bird guides and participation in educational initiatives, creating entrepreneurial opportunities and fostering long-term interest in ornithology. Together, these strategies would enable SANParks to strengthen its appeal to birders while simultaneously contributing to conservation, education, and economic growth.

To achieve this, it is necessary to align strategic opportunities with the three distinct birder segments. Casual birders require comfort and accessibility and would benefit from introductory birding experiences bundled with general wildlife products. Intermediate birders should be targeted through the expansion of events, routes, and educational programmes that deepen involvement and create pathways towards more avid participation. Avid birders, in contrast, demand premium experiences, including species-focused trips, access to specialist guides, early-access hides, and opportunities to engage more actively in research and conservation initiatives. Recommended actions in support of these opportunities include the development of a SANParks Birding Routes Network linking flagship and smaller parks, the launch of species-specific trips such as raptor, vulture, or waterbird weekends, and the enhancement of bird hides and interpretation centres with a focus on quality, uniqueness, and educational content. Additionally, the development of a SANParks' birding app with offline capabilities, life lists, and citizen-science upload features would facilitate knowledge acquisition and participation. Partnerships with Honorary Rangers and local guides could ensure specialised and high-quality experiences, while bundled experiences that encourage donations and conservation contributions would align visitor enjoyment with SANParks' sustainability objectives.



Theme 5:

MANAGING VISITORS AND VISITOR EXPERIENCES

Photo: Tankwa Karoo National Park taken by Rudolph de Girardier

TACKLING TRAFFIC CONGESTION IN KRUGER: FINDING WORKABLE VISITOR MANAGEMENT SOLUTIONS

Researchers: Roy Ballantyne (University of Queensland), Liandi Slabbert (SANParks), Jan Packer (University of Queensland), Joanne Sneddon (University of Western Australia).

Introduction

Managing rising visitor numbers in South Africa's Kruger National Park, especially traffic congestion and its effects on visitor experience, is the core challenge addressed here. Recognising the Park as both a conservation area and a tourism destination, the study explores how stakeholder engagement can be used to tackle complex and competing priorities. Traffic-related issues at wildlife sightings, park entrance gates, and key visitor sites have been identified as major concerns impacting both satisfaction and safety.

Methods

A mixed-methods approach was used, beginning with 10 focus groups involving 125 participants from 9 key stakeholder categories, including day visitors, overnight visitors, tour operators (e.g. open safari vehicle operators, or OSVs), SANParks management, local accommodation providers, taxi associations, and the SANParks Honorary Rangers. These discussions generated a list of problems and suggested solutions. The next phase involved two rounds of Delphi surveys to gain consensus on the most important problems and preferred solutions. The first round included 394 respondents; 390 participated in the second round.

Focus groups



South African
NATIONAL PARKS

10 focus groups with 9 stakeholder groups in 3 locations

Key Findings

- Traffic congestion at wildlife sightings and entry gates was universally identified as the most pressing issue.
- Other concerns included visitor behaviour, vehicle speeding, and conflicts between user groups, especially between self-drive tourists and OSV operators.
- Stakeholders proposed over 90 solutions, with the most agreed-upon being:
 - » Enforcing vehicle behaviour rules at sightings
 - » Creating a new online booking system to speed up vehicle entry
 - » Providing separate entry queues for different visitor types
 - » More rigorous enforcement of road rules and speed limits
 - » Developing a complaint reporting system
- There was consensus that SANParks staff must model appropriate behaviour and that visitor education is essential.
- A recurring theme was the need to shift visitor expectations away from the Big Five focus to a broader appreciation of the park's biodiversity and experiences.



Management Implications

Collaborative platforms, like the co-inquiry process used in this study, can successfully bring together diverse stakeholders to collectively diagnose problems, overcome surface-level frictions, and co-develop actionable strategies.

Effective traffic management in KNP requires a deliberate, transparent, and inclusive approach. The research offered a series of practical recommendations to support improved traffic management in KNP. One of the key priorities is the development and communication of a clearly defined traffic management plan. This plan should outline KNP's objectives, principles, and non-negotiables, and clarify the roles of various stakeholders. To restore trust and foster cooperation, KNP should prioritise proactive, regular stakeholder engagement. Building better relationships with private tourism operators can help address tensions and prevent escalation. This includes not only consultative forums but also practical opportunities for operators and staff to co-develop or test solutions such as self-regulation mechanisms, capacity limits, or behaviour-based permitting systems.

Attention should also be given to improving the capacity and support for traffic enforcement staff. Ensuring they are sufficiently staffed and well-trained is essential for consistent enforcement of traffic rules. Stronger alignment between conservation and tourism teams within the park will further enhance the credibility and fairness of traffic-related decision-making.

Finally, embracing a learning mindset and willingness to test alternative strategies (such as route rotation, guided access in high-density areas, or increased transparency in incident reporting) can help KNP navigate this complex issue while balancing biodiversity conservation and high-quality visitor experiences. Sustainable traffic solutions will depend on consistent leadership, adaptive management, and an honest reckoning with trade-offs between access, safety, and ecological protection.



Recommended citation: Ballantyne, R., Slabbert, L., Packer, J., & Sneddon, J. (2026). Tackling traffic congestion in Kruger: Finding workable visitor management solutions. In A Decade of Learning: Tourism Research in SANParks (2015-2025) (pp. 134-137). South African National Parks.

Related article: Ballantyne, R., Slabbert, L., Packer, J., & Sneddon, J. (2023). Negotiating stakeholder solutions to complex visitor management problems: the case of traffic management in the Kruger National Park. Transactions of the Royal Society of South Africa, 78(3), 197-206. <https://doi.org/10.1080/0035919X.2023.2214105>

TOURISTS' FEELINGS AND BEHAVIOURS IN CROWDED AREAS OF KRUGER NATIONAL PARK

Researcher: Peet van der Merwe, North-West University.

Introduction

Tourism in the Kruger National Park (KNP) generates significant income, but high visitation levels, particularly in the southern region, have created crowding challenges. Over-concentration at rest camps, picnic sites, facilities, and especially wildlife sightings threatens the quality of visitor experiences and sustainable park management. Previous studies highlighted concerns about congestion, but little was known about how tourists perceive, feel, and behave in crowded situations. This study, therefore, aimed to investigate tourists' feelings and behaviours in overcrowded areas of the southern KNP and to provide practical recommendations for management.

Methods

A qualitative, inductive approach was employed. Data was collected through 23 semi-structured interviews with adult visitors (day and overnight) during the December 2022 school holidays at Berg en Dal and Skukuza rest camps, the Skukuza day visitor site, and Afsaal picnic site. Participants were recruited through purposive and convenience sampling. Interviews were recorded, transcribed, and analysed thematically using Creswell and Creswell's six-step qualitative analysis framework.

Key findings

Visitor motivations to the southern KNP region centred on proximity, wildlife abundance (especially predators), accommodation availability, park attributes, and habitual visitation. Crowding was reported across multiple sites, including Skukuza and Lower Sabie rest camps, Afsaal picnic site, entrance gates, ablution facilities, and wildlife sightings.

Tourists expressed mixed feelings towards crowding. Negative emotions included frustration, anger, and disappointment, especially when vehicles blocked views or others disregarded park rules. However, some participants expressed tolerance or excitement, as crowding often indicated the presence of sought-after wildlife. Behavioural responses ranged from staying at the site due to being "boxed in" by vehicles or wishing to see animals, to leaving when sightings were obstructed or considered uninteresting.

Crowding at tourist facilities generated practical concerns, such as insufficient ablution facilities, inadequate seating at picnic sites, and long queues. Visitors' feelings towards Open safari vehicles (OSVs) were as asked. The results revealed evoked divided opinions: some visitors valued them as helpful, while others saw them as intrusive, rude, or rule-breaking. Despite these challenges, most participants indicated they would return to the park, though some would avoid peak seasons.

Management implications and further research

The study highlights that crowding is a complex and context-dependent phenomenon, which can affect visitor satisfaction and the sustainability of the KNP experience. Management interventions suggested by visitors include:

- Strengthening the enforcement of rules and codes of conduct at wildlife sightings.
- Improving infrastructure capacity (ablution blocks, seating at restaurants and picnic sites, parking, clearer campsite demarcation).
- Enhancing visitor education and etiquette awareness, including behaviour at sightings.
- Regulating OSV operations to ensure equitable access and reduce congestion.
- Providing real-time information about crowded sites to spread visitor flows.

As a pioneering effort, this study provided valuable insights into how tourists perceive and react to crowded conditions. Importantly, the instruments and approach developed here can inform future monitoring across other national parks, helping SANParks balance visitor enjoyment with ecological integrity. This qualitative effort was subsequently followed up with a large-sample quantitative study in which surveys were distributed to a broader database of overnight visitors to KNP. In the follow-up study (work in progress), visitors were presented with various crowding scenarios as part of a choice experiment designed to determine their thresholds – specifically, what levels of crowding and under what circumstances they are willing to tolerate certain conditions, and at which point they would choose to leave a sighting. These results will soon be published.

Together, these studies contribute evidence for managing visitor use to sustain both the quality of visitor experiences and the conservation mandate of national parks.

Recommended citation: Van der Merwe, P. (2026). Tourists' feelings and behaviours in crowded areas of Kruger National Park. In A Decade of Learning: Tourism Research in SANParks (2015–2025) (pp. 138–139). South African National Parks.

Related article:

Van der Merwe, P. (2023). Tourists' feelings and behaviours in crowded areas of the Kruger National Park's southern section, Koedoe 65(1), a1762. <https://doi.org/10.4102/koedoe.v65i1.1762>



PLANNING FOR LONG-TERM DESTINATION ATTRACTIVENESS:

Current and anticipated future value perspectives of SANParks-run tourism accommodation

Researcher: Liandi Slabbert, SANParks.

Introduction

The appeal of accommodation offerings is an important driver of SANParks' reputation, revenue stability, and conservation funding. To inform management decisions and long-term accommodation strategy, this study analyses what visitors value and expect, and the trade-offs they make between in-park and external lodging. Given growing financial pressures on consumers and increasing demand for value for money accommodation, SANParks seeks to adapt its offerings to remain competitive and relevant, particularly among diverse and future visitor segments.

Methods

A phased mixed-methods design was used. A preliminary desk research phase (April–June 2023) was undertaken to establish the study framework and inform the research instruments. Phase 1 (June 2023–May 2024) involved face-to-face exploratory interviews with visitors and park managers across four national parks: Addo Elephant (AENP), Golden Gate Highlands (GGHNP), Garden Route (GRNP), and Kruger National Park (KNP). This phase generated qualitative insights into visitor perceptions of value, expectations, and operational considerations influencing accommodation choices.

Phase 2, launched in November 2024 and continued into early 2025, included an online visitor survey incorporating a stated preference choice experiment. Data collection for this phase took place across three parks: KNP (November 2024), AENP, and GRNP (February–March 2025). GGHNP's distinct product and demand characteristics meant it was excluded from Phase 2 to ensure methodological consistency. This phase is designed to assess willingness to pay (WTP) for different accommodation attributes and to quantify visitor preferences and expectations.

Key findings

Preliminary research

As part of the study's preliminary phase, secondary research and site visits were conducted to evaluate the competitive accommodation landscape surrounding the four parks to assess their tourism performance during 2022/23. These parks were selected for their significant share of SANParks' total bed capacity, recent patterns of guest attrition to private sector competitors, and growing concerns around pricing, quality, and family-friendliness of in-park accommodation offerings.

Addo Elephant National Park (AENP) showed clear signs of recovery by early 2023, with overnight tourism activity rebounding strongly. However, limited expansion of accommodation infrastructure, particularly family units, has constrained growth potential. Competitor establishments in the Greater Addo region offer strong value through modern amenities, competitive pricing, and online visibility, although the immersive, in-park experience continues to distinguish Addo from its counterparts.

Garden Route National Park (GRNP) has maintained steady momentum, supported by its scenic appeal, diverse product range, and consistent seasonal demand. While visitation levels have nearly returned to pre-pandemic performance, occupancy recovery has been more gradual. The abundance of affordable, well-equipped alternatives nearby exerts competitive pressure, yet the park's nature-based experiences remain a strong draw for environmentally minded travellers.



Photo: Tankwa Karoo National Park taken by Rudolph de Girardier

In Golden Gate Highlands National Park (GGHNP), overall visitation has stabilised, but accommodation performance remains weak due to limited market visibility and inadequate product modernisation. The Golden Gate Hotel continues to deliver dependable value, yet the rest camp units lag behind in comfort and appeal, making nearby private lodges and farm stays more attractive to families and higher-spending visitors. Kruger National Park (KNP) continues to command strong loyalty and emotional attachment among its core visitor base, driven by its wildlife experiences and heritage value. Nonetheless, the park faces increasing competitive and reputational pressures. Persistent concerns over ageing infrastructure, maintenance standards, and pricing relative to nearby private offerings continue to challenge its positioning in a rapidly evolving tourism market.

Many visitors consciously trade off modern comforts and amenities for a deeper connection with nature. Understanding these trade-offs is essential for enhancing the value proposition of national park accommodation and developing more competitive, visitor-centred offerings.

Interviews

Most participants reported that value for money is now a greater priority than it was five years ago. Rising living costs, retirement, and family considerations contribute to this shift. Visitors assess value for money based on cleanliness, maintenance, affordability, proximity to nature, comfort, and friendly staff. Unique features like scenic views, early access to wildlife, and the peaceful ambience of rest camps, significantly enhance perceived value.

Many overnight guests feel they make trade-offs on accommodation quality to enjoy the immersive in-park experience. Issues such as ageing infrastructure, inconsistent cleanliness and poor maintenance were frequently raised but often accepted as the “cost” of staying in nature.

Across all parks studied (KNP, GRNP, AENP, and GGHNP), a clear need was expressed for regular upkeep, better cleaning while a minority wanted modernised furnishings, bathrooms, and kitchens. Wi-Fi and improved lighting were also common requests.

Visitors showed strong support for solar power, water-saving features, recycling, and sustainable materials. Many expressed that future accommodation should remain nature-focused but incorporate basic modern comforts and eco-conscious solutions.

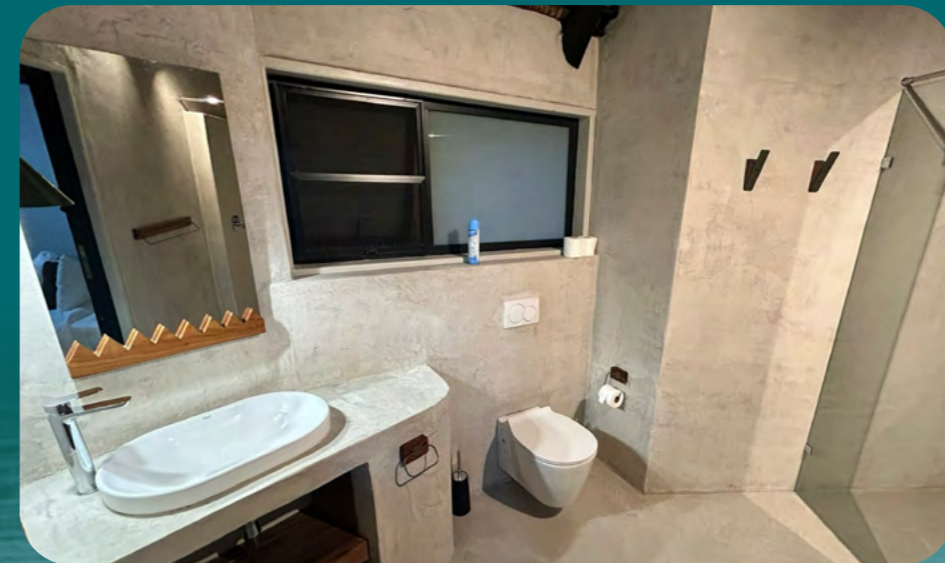
Visitors who stayed outside the parks cited cost, lack of family-sized units, availability issues, and outdated facilities as primary deterrents. Awareness gaps among international visitors and booking difficulties were also noted.

Survey results

Based on the findings from the surveys conducted among overnight visitors to Addo Elephant National Park (AENP), Garden Route National Park (GRNP), and Kruger National Park (KNP), several important patterns and distinctions emerge regarding visitor expectations, perceptions, and willingness to pay for accommodation.



Upgraded accommodation in the Skukuza rest camp, Kruger National Park



Photos of upgraded accommodation in Skukuza rest camp: Mario Paul (Wild Photo Africa)
Photo of hippos: Alistair Daynes

Key findings across all parks

Value for money and uniqueness

Across all three parks, visitors generally agree that staying in a national park offers a unique experience and good value for money – especially when compared to alternative options. However, perceptions of accommodation tariffs being reasonable varied, with only 44% of KNP visitors agreeing with that statement.

Cleanliness and maintenance are critical

Cleanliness and well-maintained units consistently ranked as the top accommodation attributes for all parks. These were closely followed by natural immersion (e.g., wildlife viewing from the unit, having a veranda, and unique camp atmosphere).

Expectations for upgrades vs. authenticity

While many respondents supported the idea of renovations, a large portion – particularly in KNP – expressed concern about altering the traditional look and feel of park accommodation. This highlights a delicate balance between modernisation and maintaining a park's authentic identity.

Connectivity expectations are divided

Opinions on Wi-Fi and connectivity were split. While not deemed “extremely important,” many visitors did expect basic access to Wi-Fi, especially at central points in the camps, indicating evolving digital expectations.

Appeal of renovated units in KNP and Willingness to Pay

In KNP specifically, upgraded units in Satara and Skukuza had strong appeal, but price sensitivity remained a constraint. Most visitors were either unwilling to pay more or only willing to pay a 5–10% premium for improved units.

Risk of losing visitors to outside accommodation

All three parks face a growing risk of visitor attrition to accommodation outside the park. In KNP, 48% of respondents had previously stayed outside the park. AENP and GRNP also reported between 24% and 32% having opted for external accommodation before. There were various reasons for this, including lack of availability of accommodation inside the Park. The likelihood of doing so in future was notably high in AENP.

Management Implications

Visitor feedback across the three parks reveals a strong desire for improved maintenance and upgraded accommodation, yet with clear caution against losing the distinctive charm that defines the SANParks experience. While modernisation is welcomed, many visitors emphasise the importance of preserving the traditional look and feel of park units that evoke a sense of authenticity and nostalgia. This suggests that future renovations should aim to enhance comfort and functionality while maintaining the natural, understated aesthetic that visitors associate with the parks.

Affordability remains a central consideration in accommodation choices. Even among frequent and enthusiastic visitors, many expressed reluctance to pay higher tariffs, with only modest increases being acceptable for upgraded units. This highlights the need for SANParks to carefully balance investment in product improvement with maintaining accessibility for domestic travellers, particularly those who are price-sensitive but deeply loyal to the brand.

When selecting accommodation, visitors consistently rated cleanliness, well-maintained facilities, scenic surroundings, safety, and proximity to nature as their highest priorities. These findings reinforce that visitors derive the greatest value from basic standards of upkeep and environmental immersion rather than from luxury enhancements. Ensuring consistent maintenance and attention to these fundamentals will therefore deliver the most meaningful improvements in visitor satisfaction.

Expectations around digital connectivity are evolving. While some visitors prefer a sense of digital disconnection in nature, a growing segment now view Wi-Fi and mobile signal as part of a quality visitor experience. A phased, location-specific approach to improving connectivity would allow SANParks to meet this expectation without compromising the sense of wilderness that defines its core offering.

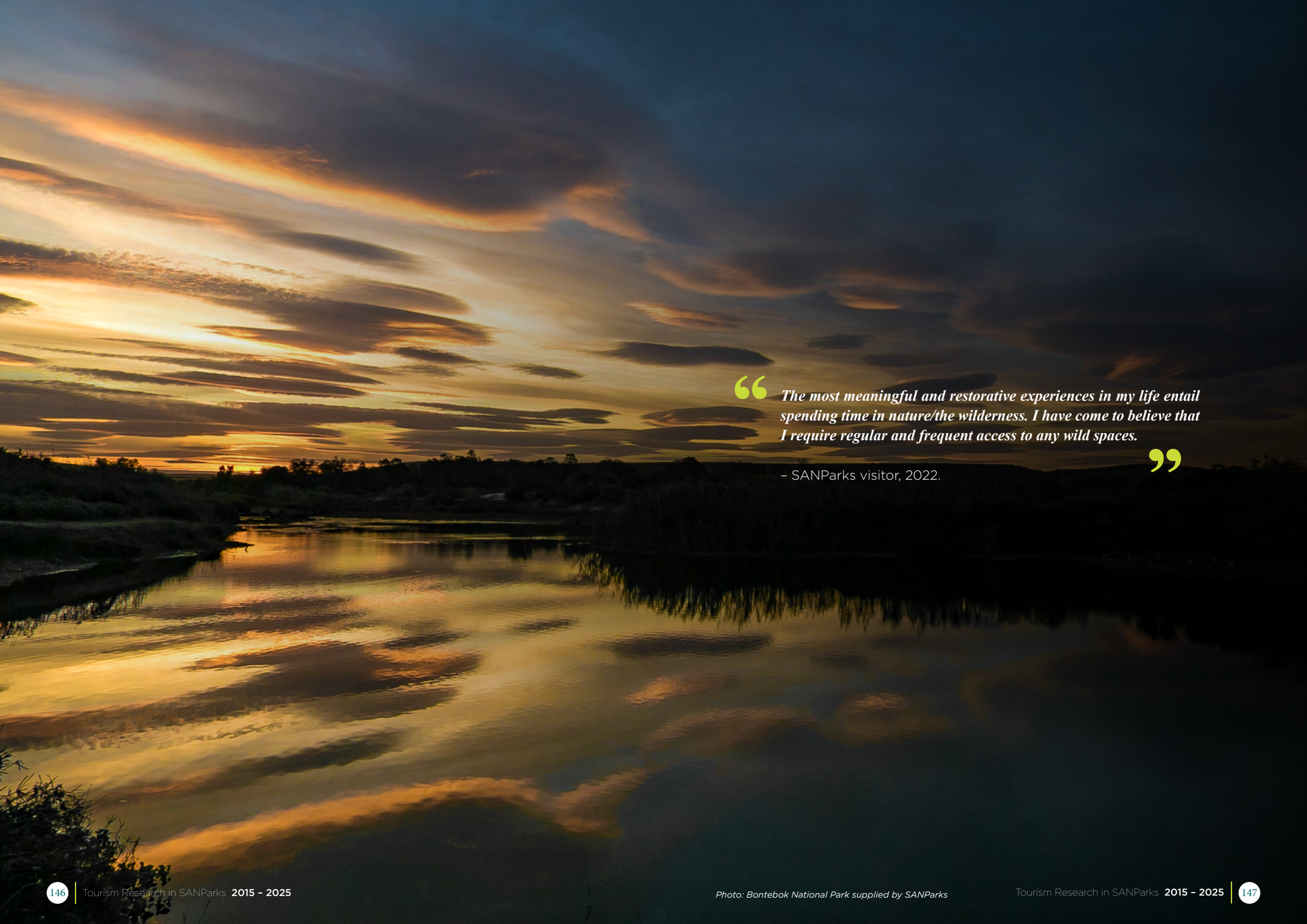
Competition from external accommodation is an increasing concern for parks where nearby private establishments are perceived to offer better quality, value, and accessibility. To retain overnight guests, SANParks should prioritise visible product enhancements and explore more flexible pricing models or bundled offerings that strengthen its competitive position.

The introduction of renovated units in Satara and Skukuza has been well received, with strong visitor interest indicating clear demand for higher-quality accommodation. However, willingness to book these upgraded units is heavily dependent on price. Visitors want to see tangible added value before paying more. This shows the importance of transparent communication around improvements and the use of compelling visual marketing to demonstrate what differentiates refurbished units from standard ones, ensuring that pricing adjustments are perceived as fair and justified.

The research identified improvements in accommodation quality, pricing, and sustainability features (including energy- and water-efficiency measures) that would enhance the overall value proposition for guests. The findings inform product development, improve pricing strategies, attract new markets, and strengthen customer retention. The study equips management with data-driven insights to remain a competitive, appealing, and financially sustainable nature-based tourism destination.

Recommended citation: Slabbert, L. (2026). Planning for long-term destination attractiveness: Current and anticipated future value perspectives of SANParks-run tourism accommodation. In A Decade of Learning: Tourism Research in SANParks (2015–2025) (pp. 140–145). South African National Parks.

Related internal report: Slabbert, L. (2025). Research report: Planning for long-term destination attractiveness in South African National Parks: A study of current and anticipated future value perspectives of tourism accommodation. South African National Park.



“ *The most meaningful and restorative experiences in my life entail spending time in nature/the wilderness. I have come to believe that I require regular and frequent access to any wild spaces.* ”

– SANParks visitor, 2022.

VISITOR EXPERIENCES AT SELECTED MUSEUMS IN THE KRUGER NATIONAL PARK

Researcher: Uwe P. Hermann, Tshwane University of Technology

Introduction

Heritage-based tourism is increasingly recognised as a significant contributor to visitor satisfaction and cultural preservation within protected areas. Museums located within national parks serve as vital interpretation centres that enhance educational value, promote cultural understanding and support tourism revenue generation. This study explores visitor experiences at two key museum sites in the Kruger National Park (KNP); the Letaba Elephant Hall and the Stevenson-Hamilton Knowledge Resource Centre at Skukuza (hereafter referred to as the Skukuza Museum), to better understand visitor expectations, satisfaction and post-visit behaviour.

The Stevenson-Hamilton Knowledge Resource Centre at Skukuza



Photo: Kevin Moore

Methods

A survey-based research design was implemented to assess visitor experiences at heritage attractions in the KNP. Structured questionnaires were administered between October 2019 and June 2021. The survey was divided into two main sections: Section A collected demographic and behavioural data, while Section B measured visitor experiences across 24 constructs using a five-point Likert scale. Data collection took place at the Letaba Elephant Hall (n = 194) and the Skukuza Museum (n = 163).

Who responded?

The respondent profile revealed key demographic differences between the two sites. At Letaba Elephant Hall, 64% of participants were female, with an average age of 44 years. Half of the respondents spoke English, 31% Afrikaans and 8% Tsonga. A well-educated cohort, 70% held a diploma, degree, or postgraduate qualification and 32% reported earning over R60 000 per month. Most visitors were from Gauteng and Limpopo, with 25% being international tourists. In contrast, at the Skukuza Museum, 55% of respondents were male with an average age of 39. English (32%) and Afrikaans (24%) remained dominant languages, but there was slightly more linguistic diversity, including 12% Tsonga speakers. Education levels were similarly high, with 72% having a diploma, degree or postgraduate qualification. However, income levels were more polarised, 38% earned less than R10 000 per month while 20% earned above R60 000 per month. Respondents to the Skukuza survey mainly came from Gauteng, Mpumalanga and Limpopo, with 36% of the sample being international tourists.

Key findings

Visitor behaviour

The majority of respondents were not frequent museum-goers, yet they showed strong loyalty as visitors to the KNP. When it came to discovering the museums, primary sources of information included word-of-mouth recommendations, previous visits, and the SANParks website. Social media, by contrast, played a minimal role in how visitors became aware of the museums.

Expectations and experiences

Visitors to the Letaba Elephant Hall held strong expectations for high-quality displays, educational value and professional, responsive staff. Expectations were particularly high for informative displays, interesting educational experiences and cultural or historical richness, suggesting a strong demand for meaningful and well-curated content. Visitors reported overwhelmingly positive experiences at the Letaba Elephant Hall. Most strongly agreed that the treatment received from employees was excellent (45.7%), and that staff demonstrated a willingness to assist (41.1%). The exhibits were praised, with over 90% rating the displays as informative, culturally and historically rich and well-presented. Visitors also appreciated the atmosphere created in the centre, with 79.2% strongly agreeing or agreeing that it enhanced their visit.

Visitors to the Skukuza Museum held high expectations for knowledgeable staff, quality treatment and well-presented, informative exhibits. They also expected a modern, immersive and educational experience, with many anticipating unique content, cultural value, and high-quality displays. Visitors to the Skukuza Museum described their experiences as highly positive, particularly in relation to staff interactions, educational value and the quality of displays. The atmosphere and treatment by employees were rated highly, with many guests acknowledging the centre as one of the best they have visited.

Visitor feelings and satisfaction

Satisfaction levels at the Letaba Elephant Hall were exceptionally high, with over 95% of respondents pleased with their decision to visit. Many described the experience as enjoyable, fun and educational. Visitors expressed overwhelmingly positive emotional responses to their experience at the interpretation centre. They described feeling content, entertained, happy, impressed and joyful. Overall, the visit left them feeling satisfied, stimulated and emotionally uplifted, with very few reporting any negative emotions.

Most visitors at the Skukuza Museum were pleased with their decision to visit (83%), stating they had a good time. Positive emotions such as joy, satisfaction, contentment, and excitement were reported. While feelings like being entertained, impressed, and stimulated were present, they were slightly less intense, suggesting a calm and relaxed experience overall.

Post-visit behavioural intentions

Visitors to both museums demonstrated strong post-visit behavioural intentions. Many expressed a clear willingness to recommend the museum experiences to others and to speak positively about it in future conversations. There was also a strong intention to return for future visits. While sharing on social media was somewhat less common, it remained part of the broader positive engagement pattern observed among respondents.

Management implications

Several recommendations were made:

Marketing and communication

- Target the youth and educated market segment: Focus marketing efforts on younger visitors, particularly those from Generation Y and Z with tertiary qualifications, as they represent a significant portion of the current audience.
- Leverage social media more effectively: Given that social media is underutilised despite the younger visitor profile, invest in more engaging and consistent social media campaigns to raise awareness and promote museum visits.
- Focus on language and geographic relevance: Deliver marketing primarily in English and Afrikaans, with strategic expansion into Tsonga-speaking areas of Mpumalanga and Limpopo to diversify and grow the visitor base.
- Strengthen awareness through referrals and reputation: Promote word-of-mouth marketing and highlight positive visitor experiences, as personal recommendations and past visits to KNP were identified as key motivators.

Staff training and interpretation quality

- Invest in continuous staff training: Ensure that museum employees are well-trained, informed and enthusiastic to deliver high-quality, educational and engaging experiences aligned with visitor expectations.
- Prioritise quality over quantity in recruitment: Employ motivated and knowledgeable staff rather than relying solely on entry-level personnel, to enhance the museum's credibility as an informative and enjoyable heritage destination.

Collaboration between museums

- Since visitor profiles are similar at both museums, joint marketing campaigns and coordinated programming can help improve visibility and reach.

Enhancing visitor engagement

- Improve interactive and educational elements: Introduce more edutainment, interactive, and technology-enhanced features such as 3D visual displays to cater to younger audiences and enrich the learning experience.
- Maintain high standards in presentation and content: Continue to prioritise the quality of exhibits and educational value, as these were highly rated by visitors and critical to satisfaction.
- Support ongoing research and visitor feedback: Conduct further research into visitor needs, demographic trends and how emerging technologies can enhance interpretation and engagement in a South African heritage tourism context.

Recommended citation: Hermann, U.P. (2026). Visitor experiences at selected museums in the Kruger National Park. In A Decade of Learning: Tourism Research in SANParks (2015–2025) (pp. 148–151). South African National Parks.

Related articles:

Hermann, U.P., & Nemaorani, T.M. (2023). Determination of visitors' intentions to revisit a natural history museum in a national park. Koedoe-African Protected Area Conservation and Science, 65(1), 1769.

Hermann, U.P., Nemaorani, T.M., Naudé-Potgieter, R.A., & De Klerk, C.D. (2025). Key Determinants of Visitor Satisfaction and Post-Visit Intentions at a Museum in the Kruger National Park, South Africa. Journal of Park and Recreation Administration, (1), 56-76.



STRENGTHENING CONNECTION AND MEANING: EXPERT PERSPECTIVES ON INTERPRETATION IN PARKS

Researchers: Roy Ballantyne (University of Queensland), Judy Mann (Rhodes University / Two Oceans Aquarium Foundation / International Zoo Educators Association)

Name tags, used for tree identification, are often found in national park rest camps



This research provides an important assessment of visitor interpretation and experiences delivered across a range of national parks, with a particular focus on enhancing relevance, engagement, and long-term sustainability of park-based learning. Two comprehensive evaluations were conducted: one combining interpretative experiences in Mapungubwe National Park and the Nyalaland Wilderness Trail (Kruger National Park). The other involved several parks in the Cape region including Table Mountain, West Coast, Garden Route, Addo Elephant, Karoo, and Mountain Zebra National Parks.

The rationale behind the research is grounded in the growing recognition that interpretive services must go beyond static displays of facts. Visitors increasingly seek emotionally resonant, meaningful, and personalised experiences that connect them to conservation goals, cultural heritage, and environmental stewardship. Moreover, high visitor volumes and a diverse audience – spanning local, regional and international demographics – require layered, inclusive interpretive strategies that accommodate different learning needs, languages, interests and motivations.

A qualitative, observational methodology was used, underpinned by international best practice in interpretive planning. Experts assessed interpretive centres, signage, guided experiences, trails, museums, boardwalks, and interactive elements. In-depth site visits and informal interviews were conducted with SANParks staff. In Mapungubwe and Kruger, special attention was given to the quality of guided walks, game drives, and cultural storytelling, while in the Cape region, diverse interpretive assets were assessed across eight parks.

Key findings reveal common themes across the sites. Many interpretive centres are content-heavy, overly academic, and lack cohesion or emotional appeal. Interpretation is often poorly signposted, outdated, or fails to provoke curiosity or reflection and often suffers from a lack of narrative flow, limited multilingual support, and insufficient attention to visitor orientation, especially at major entry points or rest camps. Across parks, there is an inconsistent understanding of the purpose of interpretation – from enhancing learning and appreciation of the site to prompting behavioural change or providing instructions. Conversely, well-delivered guided experiences on foot – especially those featuring personal stories, humour, cultural connections, and environmental messages – were praised by evaluators.

Despite these shortcomings, there are several strong foundations: enthusiastic staff, visually compelling natural and cultural assets, and several high-quality interpretive nodes (e.g., Forest Legends Museum in Garden Route NP, and cultural storytelling in Mapungubwe). However, interpretive infrastructure is often underutilised, poorly maintained, or disconnected from broader visitor journeys.



Interpretive displays at the Letaba Elephant Hall in Kruger National Park



Management implications

Reimagining interpretive centres and signage

Content should be redesigned to tell stories that are memorable, layered, and emotionally resonant. Interpretation must be visitor-centred, address common questions, and include clear take-home messages related to conservation and heritage.

Investing in guide training and storytelling capacity

Expert feedback highlights the exceptional value of engaging, knowledgeable guides. Continued investment in interpretation-focused training will improve quality and consistency across game drives, walks, and cultural tours. This will enhance the experience and encourage repeat visitation, inspiring word-of-mouth advertising.

Improving wayfinding, orientation and multilingual access

Basic visitor needs, such as signage, route clarity, and orientation, require urgent attention. Simple tools such as clear maps visible in areas with high foot traffic, brochures, apps, and audio guides in multiple languages can greatly enhance experience accessibility.

Integrating themes across interpretive assets

Interpretive design should be guided by clear educational goals and thematic coherence across trails, displays, and digital materials. Interpretation must move beyond isolated facts to support a cohesive and interactive learning journey tailored to visitor needs.

Creating more interactive, family-friendly, and inclusive experiences

Simple additions such as props, children's activities, refreshments, and inclusive trail access can significantly enhance visitor satisfaction and broaden appeal to diverse market segments.

Linking interpretation with sustainability goals

More interpretation should link environmental challenges with individual action. For example, using interpretation to address climate change, pollution, land use, highlighting local community conservation stories creates relevance and promotes care for protected areas.

This project makes a strong case for embedding interpretation at the heart of the SANParks visitor experience strategy. Tomorrow's visitor is looking not only for scenery or sightings, but for meaning, identity, and purpose. Well-designed interpretation, rooted in stories and delivered with authenticity, has the power to deepen visitor engagement, broaden accessibility, and enhance the sustainability of national parks as transformative spaces for both conservation and connection.

Recommended citation: Ballantyne, R. & Mann, J. (2026). Strengthening connection and meaning: Expert perspectives on interpretation in parks. In A Decade of Learning: Tourism Research in SANParks (2015-2025) (pp. 152-154). South African National Parks.



SATISFACTION, BARRIERS AND WILLINGNESS-TO-PAY FOR GUIDED GAME DRIVES IN SOUTH AFRICAN NATIONAL PARKS

Researcher: Liandi Slabbert, SANParks.

Introduction

Guided game drives are one of the cornerstone tourism products offered across multiple national parks, designed to provide visitors with safe, educational, and memorable wildlife-viewing experiences. Despite their popularity, limited empirical data existed on visitor satisfaction, barriers to participation, and willingness to pay (WTP) for enhanced or alternative offerings. This study, conducted in October - November 2016, aimed to better understand visitor behaviour and preferences relating to guided game drives. The results provide an evidence base to guide product development, pricing, and quality improvement initiatives across SANParks.

Methods

A quantitative research approach was employed through an online survey distributed to overnight visitors who had stayed in SANParks accommodation in the preceding 12 months. Participants were recruited through SANParks' customer database, official website, and social media platforms. The structured questionnaire included closed-ended items to assess participation rates, satisfaction (via a Net Promoter Score, which assess how likely respondents are to recommend activity to others), factors influencing future bookings, and willingness to pay for enhanced experiences. Open-ended questions captured qualitative insights on satisfaction, guiding quality, and suggestions for improvement. A total of 1 426 valid responses were collected and analysed descriptively.

Who responded?

Most respondents (87%) were South African, while a smaller share represented key international markets such as Germany, the United Kingdom, France, and the Netherlands. Within South Africa, the largest proportions came from Gauteng (43%) and the Western Cape (27%). The age profile leaned towards older visitors, with 32% aged between 56 and 65 years and 26% aged 66 or older, while the gender split was 58% male and 42% female. Over half of respondents (55%) travelled in pairs or small groups of up to two people, and 36% in groups of three to five. Among those accompanied by children, most (68%) had school-aged children between seven and eighteen years. Overall, the sample typifies SANParks' core market of mature domestic travellers and family-oriented visitors.

Key findings

Just over half of respondents (56%) had taken at least one guided game drive in the past year, with Kruger National Park being the most popular site (78% of participants). Despite positive comments about the uniqueness and educational value of drives, the Net Promoter Score was only 0.46, meaning the number of those recommending the activity was almost equal to those who would not recommend. On an NPS scale of -100 to +100, positive scores are good; +50 and higher signals exceptional performance and a base of loyal promoters rather than simply satisfied visitors. A score of close to zero signals satisfaction with the experience is fragile and could swing either way. The most common criticisms related to inconsistent guiding quality, limited enthusiasm among guides, rushed drives, and perceptions of high cost or low value for money.

When asked what would make them more likely to book a guided drive in future, respondents highlighted four main factors: offering different types of experiences, providing varied pricing options, improving the quality of guiding, and introducing special offers or group discounts.

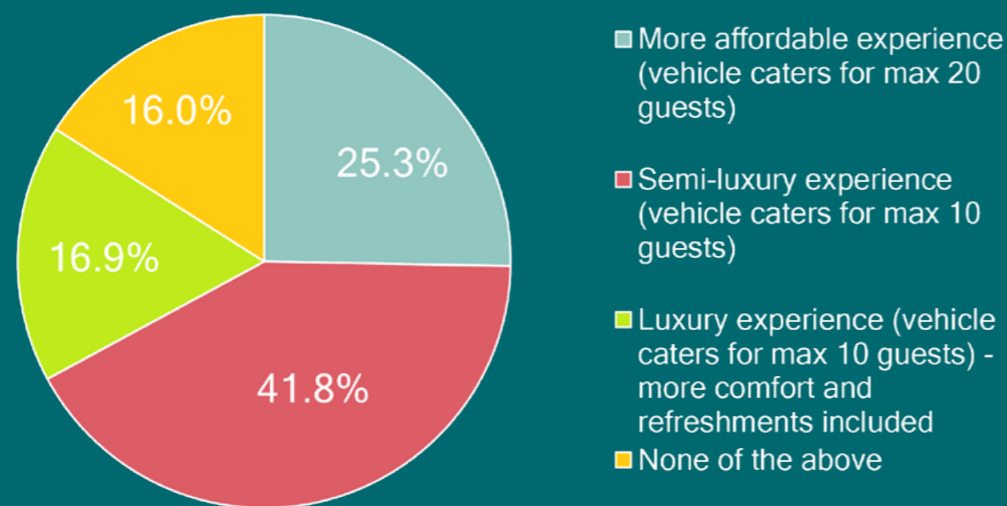
The figure below depicts the median agreement ratings for factors influencing likelihood of booking a guided game drive measured on a Likert scale, ranging from completely disagree (1) to completely agree (5).

Likelihood of booking guided game drive on next trip under certain conditions

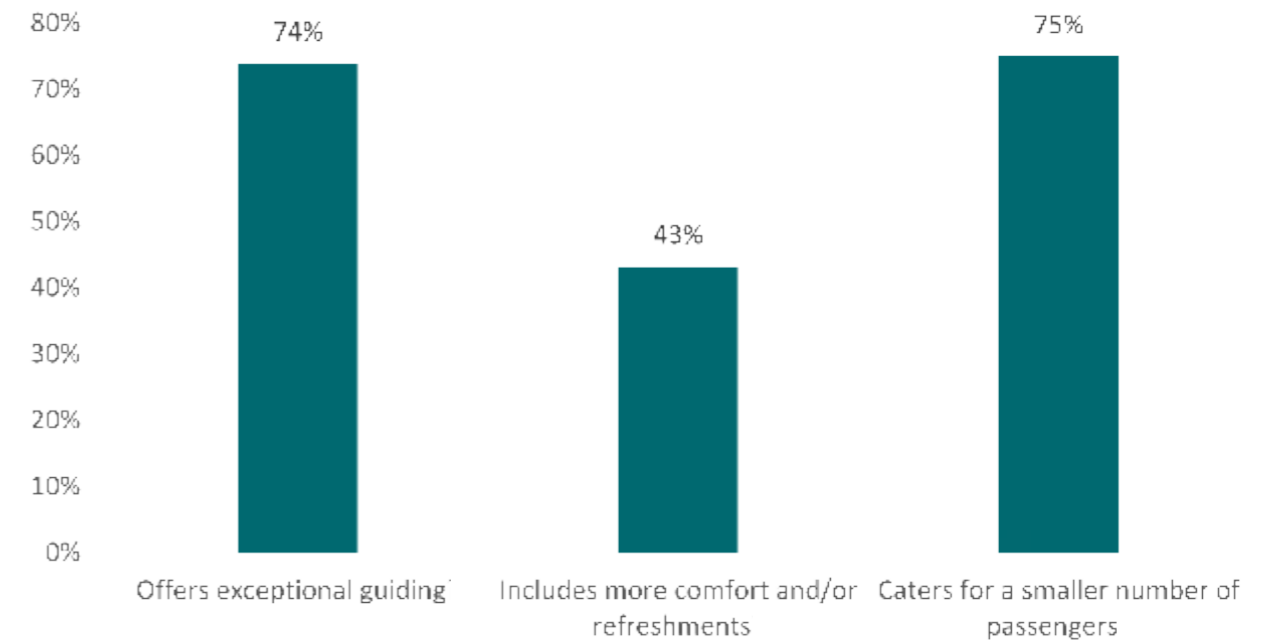


Preferences for product formats revealed a strong appetite for diversification. Forty-two percent preferred a semi-luxury experience in a smaller vehicle, 25% chose a more affordable large-vehicle option, and 17% favoured a full-luxury version that includes comfort and refreshments. Almost 11% indicated they would be more likely to book if loading platforms were provided for mobility-challenged guests.

Which of the following experiences are you more likely to go for?



Willingness-to-pay results showed that 75% of guests would pay more for smaller group sizes, 74% for exceptional guiding, and 43% for added comfort or refreshments. This pattern reflects a clear readiness to pay a premium for quality and exclusivity, provided that the experience delivers strong interpretive value and personalised engagement.



Management implications

The results indicate that improving guiding quality remains the most critical intervention for enhancing visitor satisfaction and advocacy. Consistent, engaging, and well-trained guides are central to delivering value and fostering emotional connections with guests. SANParks should therefore invest in guide training that integrates interpretive storytelling, environmental education, and hospitality principles, while also establishing standardised performance benchmarks across parks.

Product diversification is another key opportunity. A tiered offering, ranging from affordable, large-group drives to semi-luxury and premium small-group options, would appeal to multiple market segments and may increase revenue opportunities without compromising inclusivity. Targeted pricing and promotional strategies, such as discounted family packages and off-peak offers, could further encourage participation among domestic visitors who cited affordability as a barrier.

Operationally, smaller group sizes, improved comfort levels, and quieter experiences are strongly preferred, suggesting a need to rebalance fleet composition and scheduling to prioritise quality over volume. Accessibility upgrades, including loading platforms, would align with SANParks' responsible tourism commitments and open participation to mobility-impaired guests.

Finally, nearly half of respondents expressed interest in specific interpretive themes such as conservation, birdlife, and cultural heritage. This provides scope for the development of specialised or themed drives that deepen engagement and enrich visitor learning. By addressing these areas – guiding excellence, diversified offerings, accessibility, and thematic interpretation – SANParks can enhance the competitiveness, inclusivity, and long-term sustainability of its guided game drive portfolio.

Recommended citation: Slabbert, L. (2026). Satisfaction, barriers and willingness-to-pay for guided game drives in South African National Parks. In A Decade of Learning: Tourism Research in SANParks (2015-2025) (pp. 156-159). South African National Parks.

Related internal report: Slabbert, L. 2016. Research Report: Satisfaction, barriers and willingness-to-pay for guided game drives in South African National Parks. South African National Parks.

DESIGNING MEMORABLE VISITOR EXPERIENCES: INTERPRETIVE PLANNING FOR THE NORTHERN KRUGER NATIONAL PARK

Researchers: Sheila Peake, Brent Moyle, Sarah Pye and Sam Van Holsbeeck, University of the Sunshine Coast.

Introduction

Memorable visitor experiences are essential for sustaining interest and diversifying audiences in the Kruger National Park. A collaborative project between SANParks and the University of the Sunshine Coast aimed to enhance visitor connections to the park's natural and cultural heritage through innovative interpretive planning focused on the northern region.

Methods

The main objective of the project was to explore how interpretation in the northern region of Kruger National Park can be planned and developed in order to create memorable visitor experiences that strengthen connections to the park's natural and cultural heritage. This included:

- developing an overarching interpretive theme and sub-themes to unify interpretation across the park.
- identifying site-specific opportunities for interpretation at the Shingwedzi, Punda Maria, Pafuri and Mopani rest camps.
- recommending innovative and cost-effective initiatives to improve visitor engagement.

Both the natural and cultural heritage lenses were considered to enrich the storytelling of the park.

The study was undertaken in early 2019 and applied three complementary approaches. First, stakeholder consultations were conducted with SANParks senior management, camp staff, and visitors to gather perspectives on interpretation priorities. Second, site visits and ethnographic observations were carried out at the respective camps to assess current interpretive infrastructure and visitor experiences. Third, autoethnographic accounts of travel in the park provided deeper insights into visitor perspectives. These activities were supported by a review of secondary literature on global best practice in interpretive design and digital tourism innovation.

Key findings

The research confirmed the need for an overarching interpretive theme to unify storytelling across Kruger National Park.

The project developed the theme "Maintaining the circle of life through conservation," with sub-themes of landscape and water to unify ecological and cultural storytelling across the park. Interpretation, and communication were framed through natural environment and cultural heritage lenses.

Across the northern region, specific interpretive opportunities were identified:

- **Shingwedzi:** highlight river and flood biodiversity and specific cultural sites such as Red Rocks and Dipene Outpost.
- **Punda Maria and Pafuri:** showcase contrasts in rainfall and associated biodiversity, integrating stories of migration and settlement, to revitalise interest in the Thulamela heritage site.

- **Mopani:** focus interpretation on dam ecology, Mopani woodland biodiversity, and cultural heritage features such as petroglyphs and historic graves.

Innovative and cost-effective recommendations:

1. Leverage existing infrastructure and visitor waiting areas with interpretive material.
2. Employ technologies: such as QR codes, virtual reality reconstructions, and interactive displays, to appeal to younger and more digitally engaged audiences.

Management and community implications

Interpretive experiences are of strategic importance for both conservation and visitor engagement in Kruger National Park. Effective interpretation is recognised as enriching visitor experiences, encouraging emotional connections with nature, and inspiring conservation behaviours. For SANParks, this means prioritising interpretive planning as a core component of tourism management.

In summary the report advocated for:

- the use of a unifying theme with supporting sub-themes for the entire park to ensure consistent communication, while still allowing flexibility to highlight site-specific stories.
- developing cultural heritage and biodiversity trails linking park regions, to create motivation for visitors to travel further north, thus easing pressure on camps in the southern part of the park.
- leveraging technology and interactive modalities to position SANParks as an innovative leader in heritage and conservation interpretation.

Importantly, the study highlighted opportunities for community involvement in interpretation, both as storytellers and beneficiaries of tourism. By integrating local voices and cultural narratives, SANParks could create experiences that are both authentic and memorable.

Recommended citation: Peake, S., Moyle, B., Pye, S. & Van Holsbeeck, S. (2026). Designing memorable visitor experiences: Interpretive planning for the Northern Kruger National Park. In A Decade of Learning: Tourism Research in SANParks (2015-2025) (pp. 160-161). South African National Parks.

The research team from the University of the Sunshine Coast with staff from the Shingwedzi rest camp, KNP.



CAMPING PRODUCT DIVERSIFICATION IN NATIONAL PARKS

Researcher: Liandi Slabbert, SANParks.

Introduction

Camping has long been an integral part of the visitor experience in South African National Parks (SANParks), offering affordable and nature-immersive accommodation. However, while camping contributed R72 million (5.9%) to SANParks' tourism revenue in 2015/16, occupancy remained below that of fixed accommodation units (50% vs 73.4%). As part of SANParks' Responsible Tourism Strategy (2012–2022), this study aimed to assess opportunities for product diversification in camping to meet changing visitor preferences, improve satisfaction, and expand the market.

Methods

A phased mixed-methods design investigated the characteristics, preferences and needs of the SANParks camping segment. The initial phase involved desk research and a content analysis of customer complaints, complemented by interviews with hospitality managers across various parks to identify recurring issues and operational insights. An online survey targeted SANParks camping customers and the wider organised camping community, reached via gatekeepers such as clubs, associations, and equipment suppliers. Invitations were sent to visitors who had camped in SANParks between October 2013 and September 2016. The survey ran in November 2016 for four weeks and yielded 3 524 completed responses.

Who participated?

Survey respondents were primarily South African (98%), with the majority residing in Gauteng and the Western Cape. The sample skewed older, with 56% aged between 46 and 65, and only 8% falling within the 18-35 age bracket. Over half (51%) travelled in groups of three or more, and 37% reported travelling with children. On average, respondents reported taking 5.63 camping trips per year, typically using tents (35%), camping trailers (30%), or standard caravans (24%). Most trips were short in duration – between one and three nights (82%) – although a notable 14% undertook extended stays of 22 nights or more. Kruger National Park was the most frequently visited destination (63%), followed by Kgalagadi (31%), Garden Route (24%), and Addo Elephant National Park (19%).

Key findings

Most campers were first exposed to camping at a young age, suggesting a long-standing affinity with this style of travel.

Key motivators for choosing camping include being **closer to nature** (4.72 mean rating), **experiencing peace and quiet** (4.64), **relaxation** (4.59), and **a sense of freedom** (4.59).

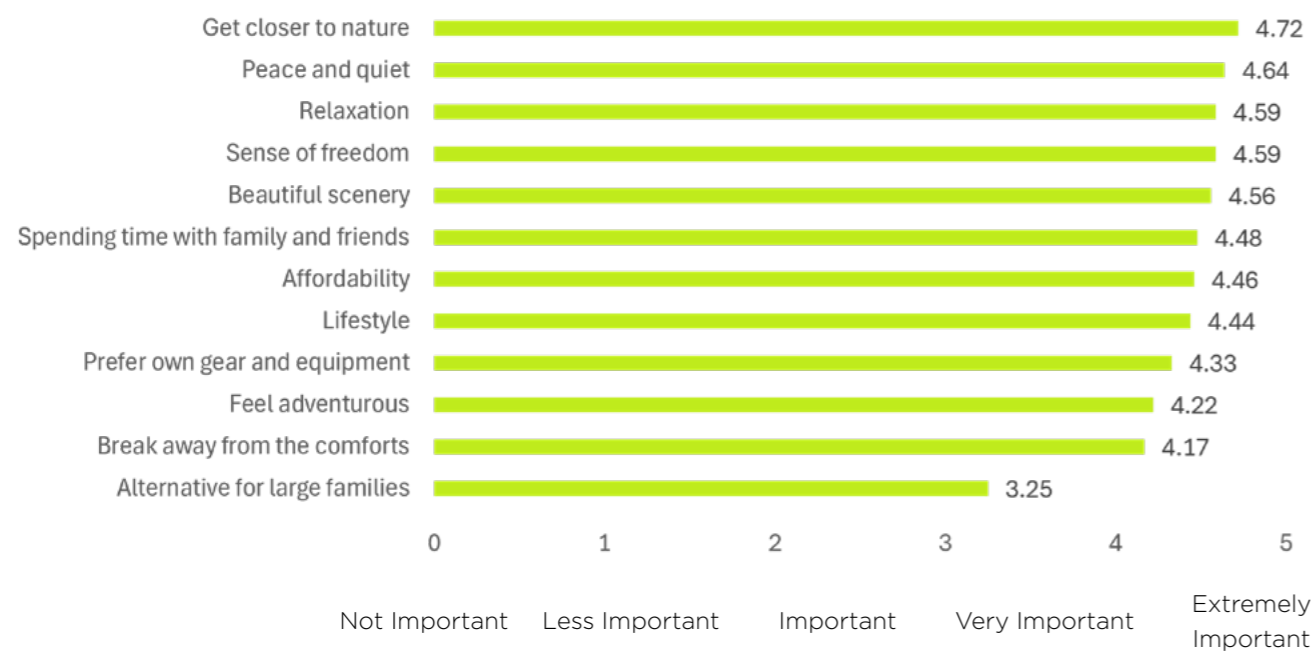
Motivational items were rated on a 5-point Likert scale where 1 = Strongly disagree, 2 = Disagree, 3 = Neither agree nor disagree, 4 = Agree, and 5 = Strongly agree. Key motivators for choosing camping include being closer.



"Camping motivations rated on a scale of 1-5 where 1 "strongly disagree", 3 "neutral" and 5 "strongly agree".

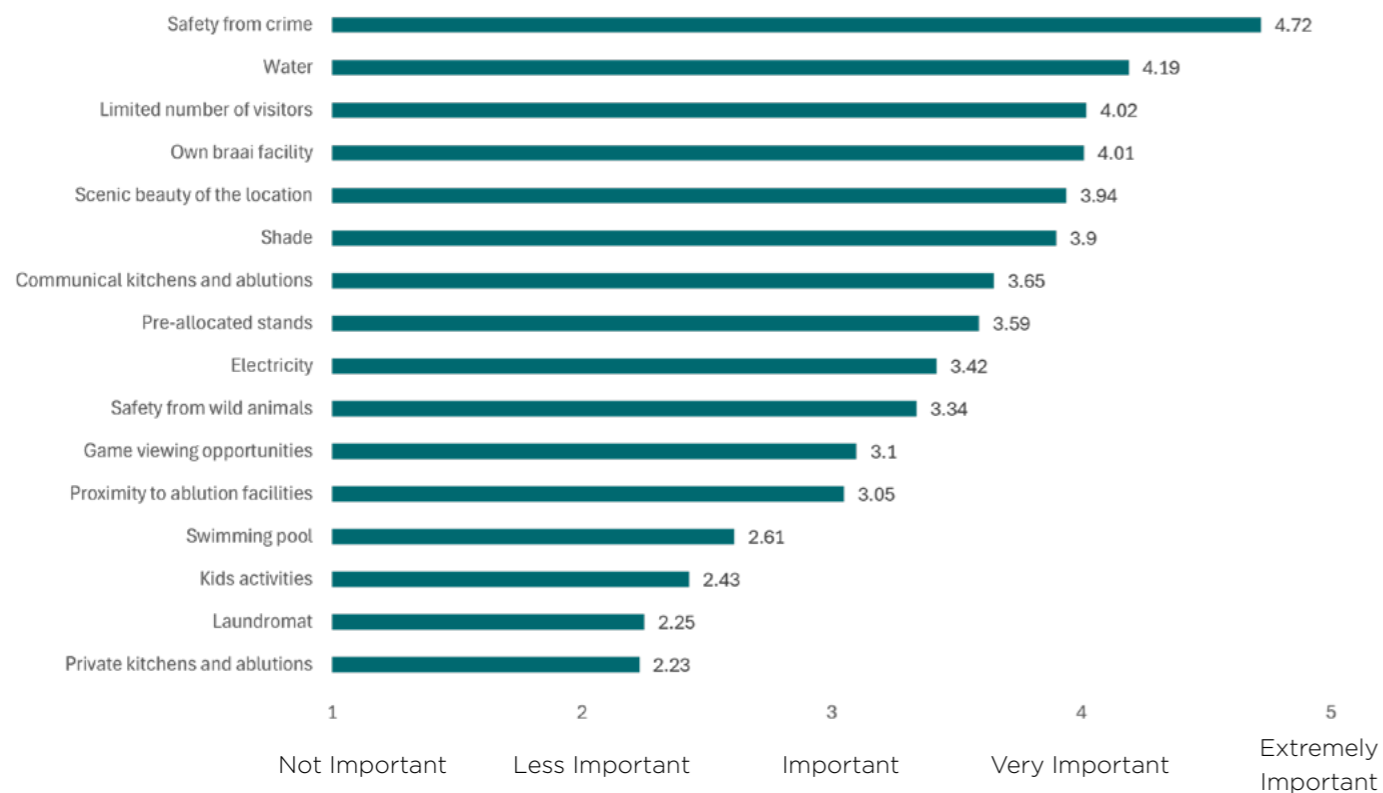


Reasons why respondents go camping (mean rating)



Safety from crime emerged as the top destination requirement (mean = 4.72), followed by water availability (4.19) and low visitor density (4.02). The availability of braai facilities (4.01) was considered more important than communal ablutions or kitchens.

Determining factors when deciding on a camping destination (mean values)



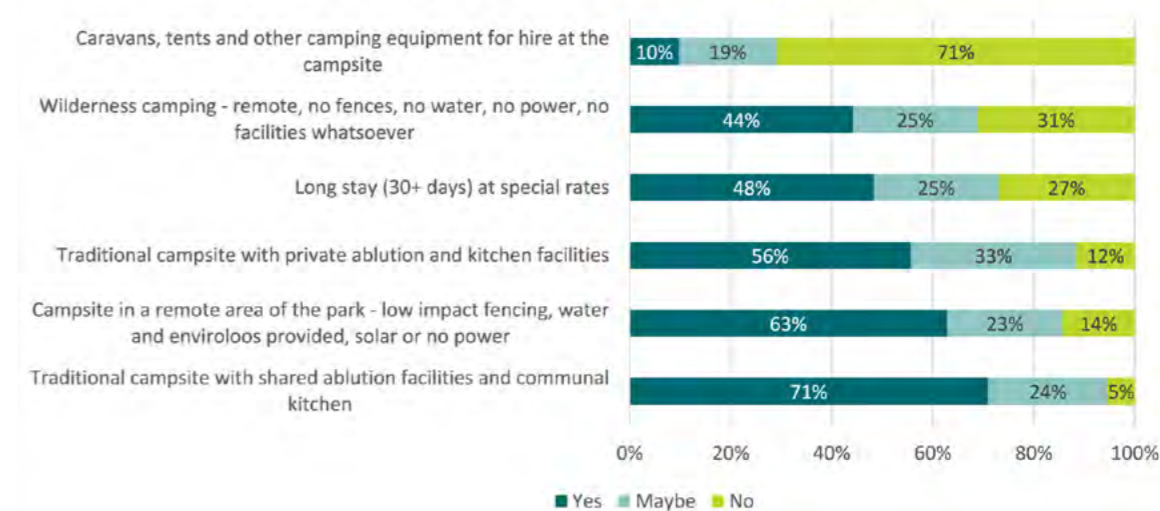
Campsites with the highest frequency of return visits included Satara, Skukuza, and Berg-en-Dal, (Kruger National Park) among others. A significant proportion of campers (64%) expressed a preference for selecting a specific stand during the booking process, and 63% preferred clearly demarcated stands.

Results revealed that campers tend to visit a range of different camps over time - two-thirds had visited at least four different SANParks campsites in the preceding three years. However, certain camps (e.g. Pretoriuskop, Skukuza) were often chosen as second-choice options due to availability constraints.

Interest in a range of products was measured to inform future product development. In addition to the strong preference for traditional campsites with shared ablution and communal kitchen facilities (71% "yes"), there is notable interest in several other camping options. These included, traditional campsites with private ablution and kitchen facilities which were supported by 56% of respondents, while 63% expressed interest in remote campsites with low-impact infrastructure (e.g., water, enviroloos, solar power).

Long-stay camping (30+ days) at special rates attracted interest from 48% of respondents, suggesting potential demand for extended park visits. Wilderness camping, offering no facilities, received a lower, but still considerable, 44% positive response. The least appealing option was hiring camping equipment at the campsite, with only 10% expressing interest and 71% rejecting the idea outright. These results indicate a clear preference for self-contained or semi-serviced camping experiences, with limited appetite for equipment rentals.

Preferences by type of camping product (% of respondents)



Preferences by type of camping product (% of respondents)

Focusing on the five largest samples (Kruger, Kgalagadi, Garden Route, Addo, Karoo), a majority of campers preferred to select a specific stand when booking- 49% in Karoo to 57% in Garden Route. The second most popular option was the "first come, first serve" approach, where visitors choose their stand on arrival, favoured by 33-42% of respondents depending on the park. Very few campers (only 4-6%) preferred being allocated a stand upon checking in at reception, indicating that most value flexibility and control over their campsite location. These findings suggest that enabling stand selection during the booking process aligns well with camper preferences and may enhance satisfaction.

Preferences for allocation of stands by Park (Kruger, Kgalagadi, Garden Route, Addo and Karoo only)

Preferred option	Kruger	Kgalagadi	Garden Route	Addo	Karoo
Be allocated a stand on checking in at reception	5%	4%	5%	6%	4%
First come first serve - choose my own stand upon arrival in the camp	40%	37%	33%	39%	42%
Select a specific stand when I do my booking	52%	55%	57%	50%	49%

Tour operator feedback highlighted a need for improved infrastructure, more flexible booking and gate policies, and better coordination of group offerings. Operators expressed strong interest in wilderness experiences and remote camping, provided basic infrastructure like shade, toilets, and designated space was available.



Recommended citation: Slabbert, L. (2026). Camping product diversification in national parks. In *A Decade of Learning: Tourism Research in SANParks (2015–2025)* (pp. 162-167). South African National Parks.

Related internal report:
Slabbert, L. (2017). *Research report: Camping product diversification study (2017)*. South African National Parks.

Photo: Addo Elephant National Park
taken by Johan Barnard

Management implications

Preserve the core camping experience while expanding options

Most campers value the traditional camping experience and basic amenities, such as clean ablution blocks, braai facilities, and scenic surroundings. SANParks should maintain this standard across all camps while strategically introducing new camping formats (e.g., private ablutions, remote camping, long stay rates) to cater to varied preferences without compromising the fundamental appeal of nature-based camping.

Target product development according to segment preferences

The study highlights how preferences vary significantly across demographic groups, camping setups, and park visitation patterns. For example, visitors using off-road caravans or camping trailers showed greater interest in remote and wilderness camping, while older campers with standard caravans prefer long stay options with basic amenities. Future development efforts should be segment-specific and park-specific, aligning product types with the dominant user base of each park.

Improve infrastructure and operational systems

Visitor feedback and tour operator interviews identified pressing infrastructure issues, such as ablution maintenance, road conditions, demarcation of stands, and booking inflexibility. Prioritising these operational enhancements—especially at high-occupancy parks like Kruger and Addo—can improve the visitor experience and maintain competitiveness. Greater stand selection control (during booking), and clearly demarcated sites, should be considered standard in key parks.

Address affordability and market competitiveness

While most respondents perceived SANParks' camping tariffs as fair, there is some concern about rising prices, particularly in light of better-value alternatives outside the parks. SANParks should carefully monitor price perceptions, especially for longer stays and peak periods, and consider bundled packages, seasonal discounts, or value-add offerings to remain competitive—especially in light of competitor offerings in neighbouring countries like Botswana and Namibia.

Diversify offerings to support revenue and access goals

There is strong demand for diversified camping products: over 85% expressed interest in remote camping, and nearly 90% in camps with private ablutions. Although wilderness camping and equipment hire received lower levels of support overall, these may appeal to niche or new markets (e.g., younger or less experienced campers). SANParks should continue experimenting with a tiered portfolio, balancing low-impact wilderness options with more comfortable, family-friendly setups.

Engage tour operators and large group users in co-design

Feedback from operators highlighted logistical challenges related to bookings, activity scheduling, and infrastructure limitations. Given their contribution to international visitor volumes and revenue, SANParks should proactively involve these partners in future planning, particularly for remote camping developments or upgrades to support overland groups.

These findings suggest a strong opportunity for SANParks to modernise and diversify its camping offering, while preserving the essence of its nature-based brand. A targeted, evidence-based approach to product development will help enhance visitor satisfaction, increase occupancy, and ensure long-term relevance in a changing tourism market.

Mini project by Prof EP de Crom and Ms ME Brand (Tshwane University of Technology) to test the effectiveness of methods to increase mindfulness and awareness in parks

A forthcoming project from the intangible benefits study, titled “Prompt to Pause”, seeks to explore how visitors in protected areas respond to prompts placed along routes. These prompts are designed to encourage people to stop, engage, notice, reflect, and contemplate particular spaces, features, or moments in nature. The project also aims to examine whether such prompts serve as reminders that stimulate visitors to use their senses more fully and become more aware of their surroundings. Ultimately, the findings will inform management strategies by highlighting how parks can promote psychological and emotional well-being through deeper engagement with nature.

Mini-project to evaluate the opportunities for visitors to experience mindfulness on guided activities

An Honours student from the Tshwane University of Technology observed guided game drives in Kruger National Park to assess whether these experiences provided opportunities for mindfulness and deeper engagement with nature. The study explored how factors such as guide narration, moments of silence, and sensory immersion influenced visitors’ ability to be present and fully appreciate their surroundings. Findings from these observations will help identify ways to enhance mindfulness during game drives, potentially informing future training for guides or adjustments to the guest experience.

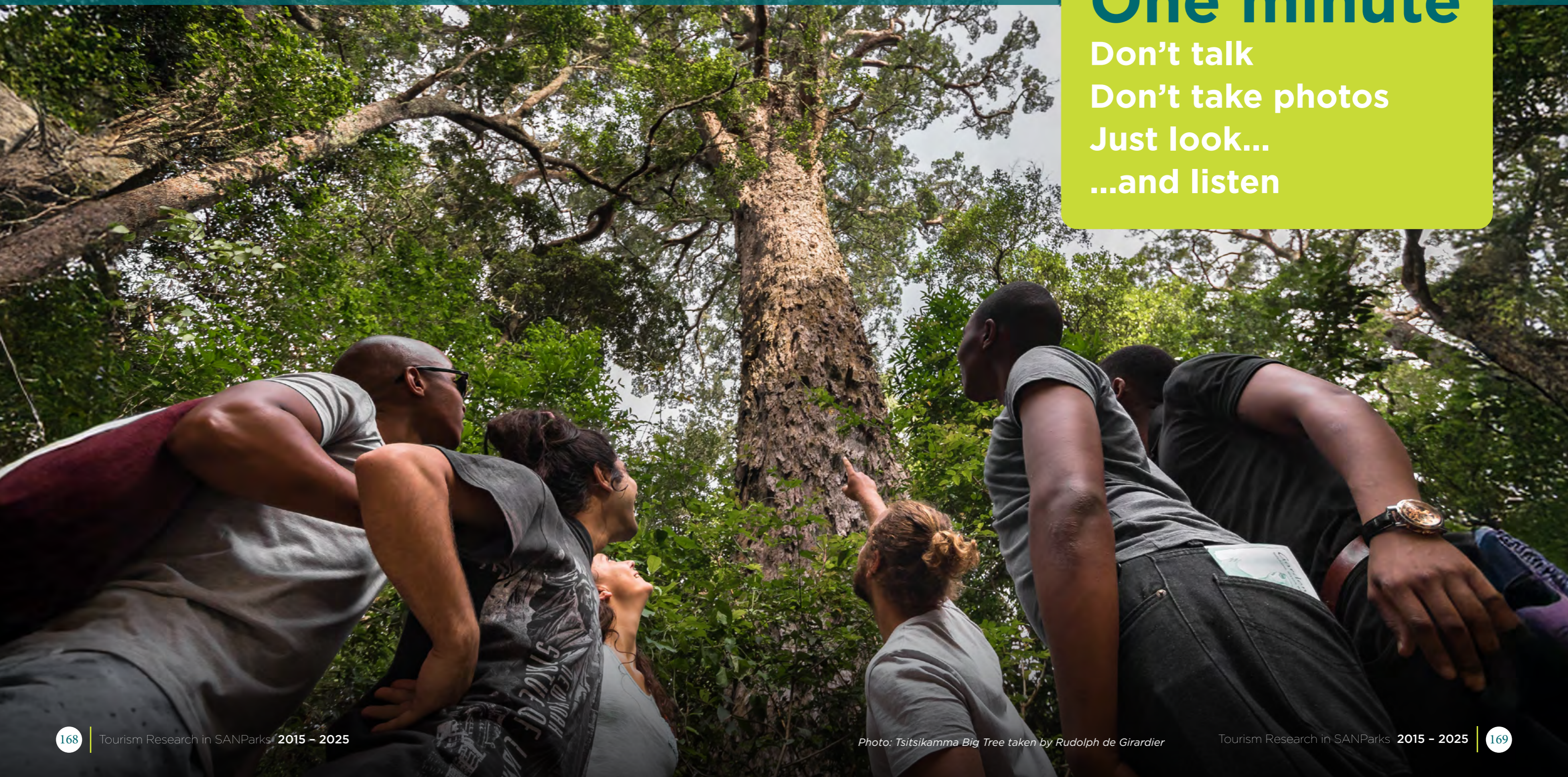
One minute

Don't talk

Don't take photos

Just look...

...and listen



Theme 6:

OPERATIONAL EFFICIENCY

Photo: Tsitsikamma Big Tree taken by Rudolph de Girardier



EXPERIENCE MATTERS: LOOKING INTO THE IDEAL VISITOR EXPERIENCE IN PROTECTED AREAS

Researcher: Anisah Deen, University of Johannesburg (at the time of the study) Current affiliation: University of South Africa.

Introduction

The visitor experience is a complex concept comprising of various aspects particularly in nature-based settings and there is a paucity of studies that postulate what an ideal visitor experience entails for its park specific settings. Considering that nature-based areas promote memorable experiences, the purpose of this study is to thoroughly describe a quality visitor experience particularly in national parks in South Africa.

Methods

The study employed a qualitative design to specifically understand and uncover the nuanced perspectives from visitors. Conducted prior to COVID-19, one on one in-depth interviews were conducted asking open-ended questions to both SANParks managers, staff, and visitors at selected camps within Kruger National Park and Golden Gate Highlands National Park. The aim was to attain intensive, detailed and complex information and data was collected conveniently from willing participants during their overnight stay at the parks and/or during their respective shifts.

Recorded interviews lasted between 35 and 50 minutes and transcribed for effective analysis using content analysis. Themes were formulated based on repetition of responses. Table 1 provides the description of the interview participants that consisted of different demographic and cultural backgrounds and fell between the ages of 31 and 73 years of age.

Key findings

Having asked questions relating to the quality of their experience during their visit for example, which elements do you consider when you look at the quality of your experience of this national park?, “how important is the quality experience to you?”, “what are the things you look for in a national park? and “list three recommendations that will improve quality of your visit?”, primary themes emerged namely: *the bush experience, emotions experienced, perceived value and attachment to the parks.*

Relative to themes *the bush experience and emotions experienced*, visitors are captivated by the sightings of wildlife however, visitors are capitulated with feelings of being at peace and in a place of rejuvenation. These feelings are accompanied by a sense of pride by the local travellers and the urge to protect the wildlife and the parks in their natural state. These experience-based themes highlight the importance of conservation and sustainability quality, referring to visitors’ perceptions of SANParks’ commitment to ecological integrity and responsible tourism.

The theme that centres around *perceived value* does contribute to the visitor’s ideal experience as competing private game reserves continue to appeal to both local and international visitors and should not be ignored. However, the emotions experienced, and feelings associated with belonging entices visitors to return to the national parks and even explore sister SANParks destinations for a potential improved experience.

Being closely linked to *emotions experienced* is the theme of *attachment to the parks*, visitors demonstrate a high sense of attachment to the parks driving the feeling of ownership and responsibility towards the park and its well-being. Both these themes highlighted the importance of both emotional and cognitive drivers in shaping the visitor experience.



Photo: Glen Reenen rest camp taken by Liandi Slabbert

Management implications

The research provides strategic recommendations for improving visitor experiences in national parks. First, it provides a deep understanding into the visitor's mind which can be used as a tool in potentially guiding staff towards better understanding visitors and their expectations across all national parks. Secondly, the findings emphasise the needs of visitors which includes emotional engagement and investment in conservation interpretation, helping visitors connect sustainability efforts with the overall value of their visit.

To support these efforts, staff development should be prioritised. Training programmes focusing on visitor interaction, conservation communication, and emotional intelligence would reinforce positive experiences. In terms of marketing, the study suggests using insights about emotional well-being and attachment, to design campaigns that relate more deeply with prospective visitors, moving beyond traditional wildlife imagery.

Interviewees	Participant	Gender	Age	Nationality	Number of years with the national park / Length of stay as a visitor	Previous visits to the parks
Int 1	Park Manager	Female	56	South African	26 years with the park	
Int 2	Visitor	Male	71	South African	3 nights at the park	More than 20 visits
Int 3	Visitor	Male	63	German	3 nights at the park	More than 20 visits
Int 4	Park Manager	Female	36	South African	13 years with the park	
Int 5	Visitor	Male	73	South African	10 nights at the park	More than 50 visits
Int 6	Visitor	Female	70	South African	10 nights at the park	More than 15 visits
Int 7	Visitor	Female	54	South African	12 nights at the park	More than 50 visits
Int 8	Visitor	Female	64	Australian	2 nights at the park	At least 9 visits
Int 9	Visitor	Male	58	German	11 nights at the park	First time visit
Int10	Tour guide	Male	49	South African	8 years with the park	
Int 11	Park Manager	Male	36	South African	9 years with the park	
Int 12	Visitor	Male	61	New Zealander	21 nights at the park	More than 15 visits
Int 13	Visitor	Female	60	New Zealander	21 nights at the park	More than 15 visits
Int 14	Visitor	Female	66	South African	7 nights at the park	First time visit
Int 15	Visitor	Male	66	South African	7 nights at the park	First time visit
Int 16	Visitor	Female	32	South African	3 nights at the park	Second visit
Int 17	Visitor	Male	31	South African	3 nights at the park	First time visit
Int 18	Visitor	Female	22	South African	3 nights at the park	First time visit
Int 19	Visitor	Female	62	South African	3 nights at the park	At least 9 visits
Int 20	Park Manager	Male	58	South African	28 years with the park	
Int 21	Park Manager	Male	47	South African	21 years with the park	
Int 22	Visitor	Female	39	South African	2 nights at the park	Second visit
Int 23	Park Manager	Male	49	South African	29 years with the park	
Int 24	Park Manager	Male	35	South African	14 years with the park	

Recommended citation: Deen, A. (2026). *Experience matters: Looking into the ideal visitor experience in protected areas. In A Decade of Learning: Tourism Research in SANParks (2015–2025) (pp. 172–174). South African National Parks.*

Related thesis:
Deen, A. (2022). *Developing a visitor satisfaction index for National Parks. University of Johannesburg (South Africa).*
<https://hdl.handle.net/10210/501228>



Photo: Golden Gate Highlands National Park taken by Liandi Slabbert

EVALUATING THE SANPARKS ONLINE EXPERIENCE: ALIGNMENT OF DIGITAL CHANNELS, VISITOR EXPECTATIONS, AND BRAND PROMISE

Researchers: Liezl-Marié van der Westhuizen, Melanie Wiese and Elizabeth Ann Du Preez, University of Pretoria

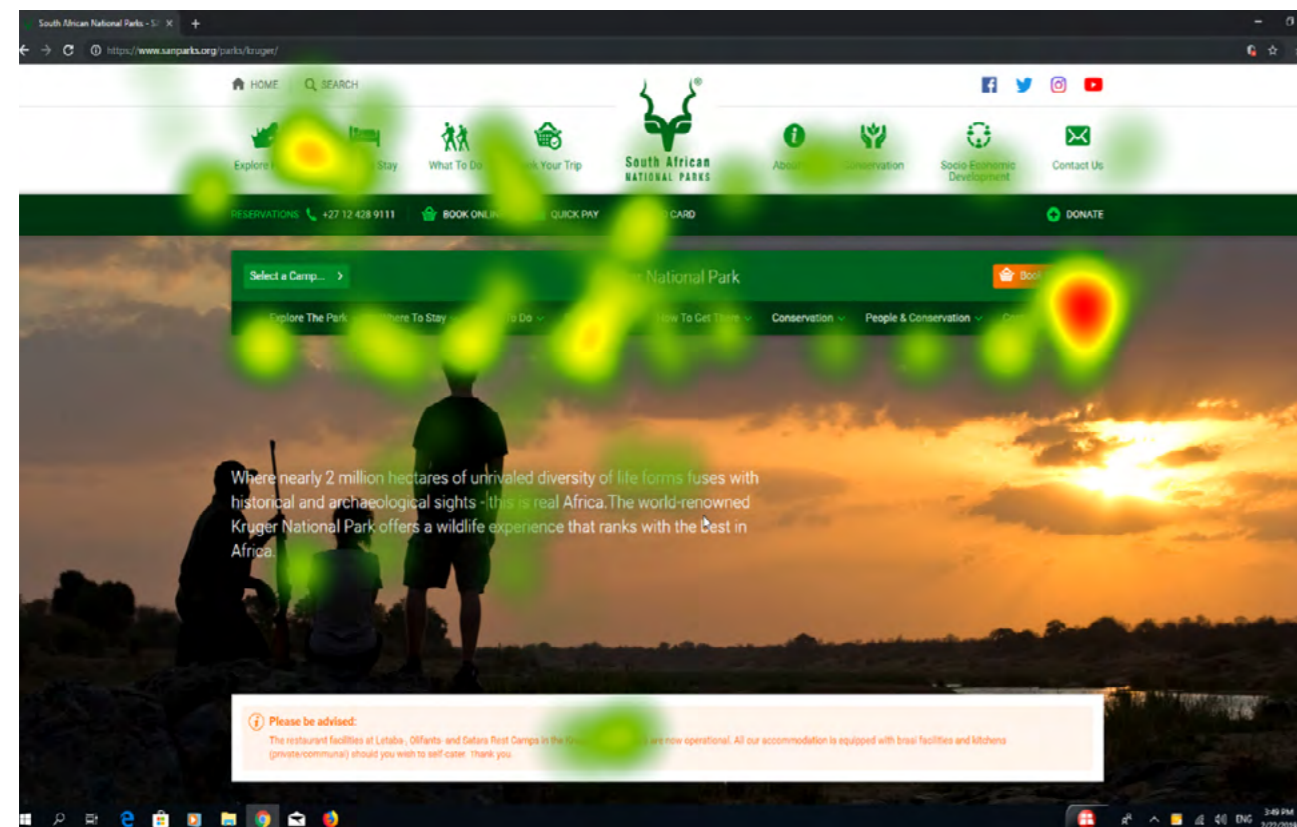
Introduction

In today's digitally driven travel economy, a national park's online presence significantly influences destination choice and visitor expectations. Recognising this importance, SANParks initiated a multi-phased research project to evaluate the full spectrum of its online experience. The study examined how easily the organisation can be found during web searches, assessed the usability of its website, and considered the role of social media engagement in shaping the broader brand narrative. The project was undertaken in response to growing awareness that the digital interface functions not only as an information portal but also as a powerful influence on perceptions, expectations, and ultimately travel behaviour.

Methods

The work focused on seven national parks, namely Agulhas, Garden Route, Golden Gate Highlands, Mapungubwe, Marakele, West Coast and Kruger National Park, representing both emerging and well-established destinations within the SANParks portfolio.

The evaluation took place during the period 2018-2019 and followed a structured, sequential mixed-methods approach across six phases:



Example of an eye-tracking heatmap showing where consumers focussed their attention when booking accommodation.

Phase 1.

Assessed ease of finding SANParks through general web searches. Thirty-eight participants conducted searches using various devices. Researchers recorded their pathways, links clicked, and whether SANParks appeared in the top search results.

Phase 2.

Analysed user navigation and content impressions of SANParks' website through user tasks, focus groups, and professional assessments. Eye-tracking technology was employed to evaluate visual engagement, and professional reviews benchmarked the website against industry best practices.

Phase 3.

Conducted a structured social media analysis, using a checklist based on established frameworks. Posts from corporate and customer-driven platforms were assessed thematically to understand engagement, sentiment, and influence.

Phase 4.

Compared the expectations created online with actual experiences on-site, using observation sheets, photo journals, and semi-structured interviews with park staff.

Phase 5.

Triangulated findings across earlier phases to see how online expectations aligned (or not) with actual experiences.

Phase 6.

Used a student challenge to create and test brand promises for selected parks, linking them back to website content.



Key findings

The research across six phases highlighted both strengths and areas of concern in SANParks' online experience.

In terms of online discoverability, SANParks was not consistently visible in the top results of generic web searches, particularly for participants unfamiliar with the organisation. While users were often willing to explore SANParks once they found the official website, the lack of strong search ranking reduced immediate visibility compared to competing destinations.

Evaluation of website usability and content showed that visitors appreciated the wealth of information available, but the website was considered overwhelming, text-heavy and difficult to navigate. Eye-tracking analysis revealed that important content was sometimes lost due to cluttered design and poor visual hierarchy. Participants expected clear, concise information, professional imagery, and simplified navigation.

The social media analysis indicated that SANParks enjoys strong organic support from visitors who share positive stories, photos and recommendations, often acting as informal brand advocates. However, SANParks' own corporate social media activity was uneven across platforms, with limited responsiveness to queries and inconsistencies in tone and content.

In comparing expectations created online with actual on-site experiences, gaps were evident in several parks. While many offerings matched online promises, there were instances where facilities, activities or services fell short of what was advertised. This contributed to dissatisfaction and eroded trust in the brand promise.

The triangulation of all phases confirmed that SANParks needs to strengthen alignment between its digital communication and on-the-ground delivery. While the SANParks brand carries strong equity, the absence of a clearly articulated brand promise across online channels weakens consistency and clarity. Finally, the student challenge reinforced the importance of articulating distinct brand promises for each park. Proposed taglines and supporting content demonstrated that clearer positioning can better convey the unique character of each destination while still fitting into the SANParks umbrella brand.

Management implications

SANParks' digital platforms are a critical touchpoint for shaping perceptions, setting expectations and ultimately influencing travel decisions. Improving online discoverability through search engine optimisation is essential. Potential visitors often begin with generic searches, and SANParks must ensure that its parks feature prominently in these results to capture early interest.

The website requires simplification and modernisation. Content should be streamlined, supported by high-quality visuals, and organised in a way that helps users find information quickly. Navigation should prioritise ease of use, with clear calls to action for bookings and enquiries.

SANParks should adopt a more proactive and consistent social media strategy. Building on the strong base of user-generated content, corporate accounts can add value by engaging directly with visitors, addressing queries, and showcasing compelling stories that strengthen the brand.

There is a need for greater alignment between the online brand promise and the on-site visitor experience. Where the website or social media creates expectations, managers at park level should ensure that facilities and services deliver accordingly. This requires closer integration between marketing, operations and product development.

Lastly, SANParks should develop and communicate clear brand promises for both the overall organisation and for each priority park. These promises should be visible across all digital channels and reflected in actual service delivery. A well-crafted brand promise will not only differentiate each park but also build trust and manage expectations more effectively.

Importantly, the study findings played an instrumental role in informing the redesign of the SANParks website, which was relaunched in late 2023. The new site reflects noticeable improvements in usability, navigation, and online booking functionality. The streamlined structure, mobile responsiveness, and clearer calls to action directly address concerns raised during the research, particularly around accessibility, clutter, and booking frustrations. While refinements are still ongoing, the redesign demonstrates that SANParks has acted on the study's recommendations and taken significant steps toward creating a more engaging, trustworthy, and user-friendly digital experience that aligns with visitor expectations and strengthens the SANParks brand promise.



Recommended citation: Van der Westhuizen, L., Wiese, M., Du Preez, E.A. (2026). Online experience evaluation of selected national parks. In A Decade of Learning: Tourism Research in SANParks (2015–2025) (pp. 176–181). South African National Parks.

AN ANALYSIS OF JOB SATISFACTION AMONGST THE TOURISM AND HOSPITALITY EMPLOYEES AT SANPARKS

Researcher: Thulani Martin Sibanyoni, Tshwane University of Technology

Introduction

Employee job satisfaction is a critical factor in organisational effectiveness, especially within the tourism and hospitality sector where service delivery depends heavily on motivated staff. For South African National Parks (SANParks), which generates significant revenue from tourism activities, ensuring that employees are satisfied is essential for sustaining service quality, customer satisfaction, and long-term organisational growth. This study set out to analyse levels of job satisfaction amongst tourism and hospitality employees across SANParks, with a focus on identifying the determinants of satisfaction and dissatisfaction and their implications for management.

Methods

A structured questionnaire, based on validated job satisfaction instruments, was distributed to employees with email addresses in 2022. Data collection included a pilot study to test the instrument. A total target population of 559 Tourism and Hospitality employees were identified and 211 valid responses were received from the sample size of 211 subjects. The received responses were cleaned using MS Excel and analysed on SPSS using descriptive statistical analysis, correlation analysis, factor analysis, t-tests, and ANOVA analysis to better understand the responses. Moreover, Cronbach's alpha was employed to measure the reliability of scales and to assess internal consistency.

Results

Research results indicated a diverse representation of demographical factors amongst the tourism and hospitality employees' within SANParks. Despite the diverse demographical representation, results further indicated different levels of satisfaction in demographical and regional differences, with some variation in satisfaction levels by age, years of service, and park region. Study results further ascertained that employee job satisfaction has a strong positive impact on organisational growth, performance, and sustainability. Conversely the consequences of employees' job dissatisfaction were found to have a strong negative impact on organisational growth, performance, and sustainability.

Research findings on overall employee job satisfaction revealed that SANParks tourism and hospitality employees are generally satisfied with their jobs, and the determinant that recorded the highest levels of satisfaction was "present work." Employees expressed moderate satisfaction with co-workers, supervision, and the nature of the job, while the lowest satisfaction levels were reported in relation to salary and promotion opportunities. Correlation analyses confirmed that satisfaction across different job factors is interrelated, with leadership, recognition, and fair remuneration emerging as significant predictors of employee job satisfaction.

Managerial implications

The study highlights the importance of addressing both intrinsic and extrinsic factors of job satisfaction to strengthen SANParks' human resource strategy. While employees value their current work and co-worker relationships, low satisfaction with salary and promotion opportunities poses risks for retention and morale. Management should therefore review remuneration structures, create transparent career development pathways, and strengthen recognition and training programmes. Investing in employee satisfaction doesn't only improve productivity and service delivery but it also enhances customer satisfaction and supports SANParks' conservation and tourism mandate. Regular monitoring of job satisfaction is recommended to identify emerging concerns and guide evidence-based human resource practices.



Recommended citation: Sibanyoni, T.M. (2026). An analysis of job satisfaction amongst the Tourism and Hospitality employees at SANParks. In A Decade of Learning: Tourism Research in SANParks (2015-2025) (pp. 182-183). South African National Parks.

Related article: Sibanyoni, T. M., Tshipala, N. N., & Venter, D. H. (2024). Key factors of job satisfaction among the tourism and hospitality employees within national parks. SA Journal of Human Resource Management, 22, 2474.

Photo: /Ai /Ais-Richtersveld Transfrontier Park taken by Rudolph de Girardier

DEVELOPING A MANAGEMENT SYSTEM FOR THE SCHEDULING AND STAFFING OF MAINTENANCE AND TECHNICAL SERVICES IN THE KRUGER NATIONAL PARK

Researcher: Janus Brummer, University of Pretoria.

Well-kept facilities are a big part of a good stay in Kruger National Park. At Letaba Rest Camp, day-to-day maintenance was being tracked in three separate paper logbooks (reception, housekeeping and maintenance). Issues were often duplicated, misplaced or forgotten; stock use wasn't recorded; and staff roles and scheduling weren't linked to the jobs that needed doing. This slowed repairs, frustrated guests and wasted effort.

In 2019, a researcher set out to design a simple Maintenance Management System (MMS) to bring everything into one place. Methods combined needs analysis, conceptual and engineering design, iterative timeboxed prototyping, and qualitative assessments with staff and managers. The prototype (built in Microsoft Access) has three linked parts: a staffing module (who can do what and when), an inventory module (what parts and tools are available and used) and a central maintenance screen (where issues are logged, prioritised and tracked to completion). It sends alerts for urgent jobs, records who is working on what, and automatically updates stock – through a straightforward interface designed for quick learning on the job.

The main fixes target the root causes found: unclear roles, no stock control and weak coordination. A step-by-step roll-out plan starts with training and beta testing, then compares the “old” paper process with the “new” digital one before full adoption. The expected benefits are fewer lost or duplicated tasks, faster resolution times, better stock management and better matching of jobs to staff skills. The model was also scalable to other rest camps to standardise maintenance across SANParks.

Recommended citation: Brummer, J. (2026). Developing a management system for the scheduling and staffing of maintenance and technical services in the Kruger National Park. In A Decade of Learning: Tourism Research in SANParks (2015–2025) (pp. 184). South African National Parks.

VISITOR FEEDBACK ON THE SANPARKS' RESERVATION DEPOSIT, MODIFICATION AND CANCELLATION TERMS AND CONDITIONS

Researcher: Liandi Slabbert, SANParks.

Introduction

This research was undertaken in early 2022 to assess client perceptions of the organisation's reservation deposit, modification and cancellation policies. The study aimed to clarify how well visitors understand the current policies, measure their appetite for change, and evaluate the potential behavioural impact of alternative policy scenarios. The results provide an evidence base to support transparent, visitor-friendly policy refinement while safeguarding occupancy and financial integrity.

Methods

Data were collected through an online survey distributed to a randomly selected sub-sample of park visitors in February 2022. In total, 945 responses were received, of which 877 were complete and suitable for analysis. The questionnaire measured self-reported familiarity with current reservation rules, perceptions of fairness and flexibility, and likely responses to four alternative deposit and cancellation policy scenarios (A-D). Each scenario combined different timings and conditions for deposits, modifications and cancellations, ranging from stricter to more lenient versions. Quantitative questions used multiple-choice and Likert-style items, while open-ended questions captured suggestions for improvement. Descriptive statistics were generated for all structured items, and the qualitative comments were thematically summarised to highlight operational pain points and client priorities.

Who responded?

The respondent profile reflects SANParks' core overnight visitor base. The vast majority were South African residents (89%), with the Gauteng (39%) and Western Cape (31%) provinces most strongly represented. The sample skewed towards experienced and loyal clients: 75% identified as regular SANParks visitors and 72% had made a booking within the previous year. The age profile was mature, with 44% aged 65 years and older and a further 30% aged 55-64, indicating that opinions largely represent established, financially independent park users with long-term engagement. Only small proportions were under 45 years of age. This demographic composition is important, as older and repeat visitors are typically more sensitive to administrative clarity and prepayment requirements, and more likely to provide detailed qualitative feedback.

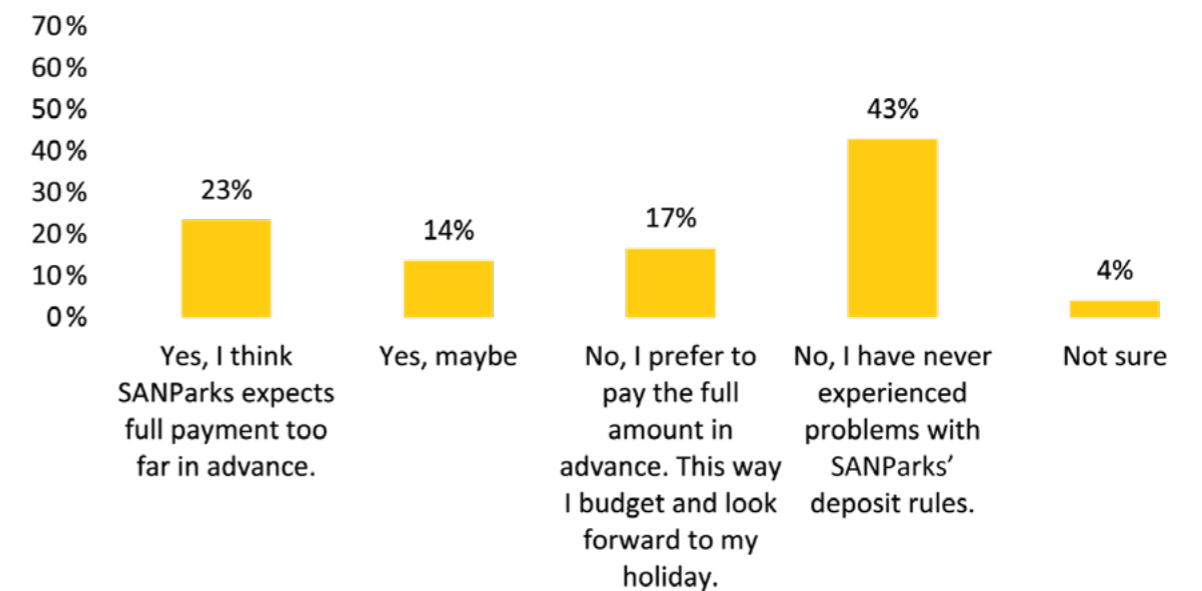
Key findings

Awareness of SANParks' reservation rules was moderate overall. While many respondents were generally familiar with the basic procedures, nearly a quarter said they were only somewhat familiar, and just over 20% described themselves as extremely familiar. This highlights an ongoing need for clear, consistent communication through booking platforms and confirmation documents.

Attitudes towards revising the rules leaned strongly towards stability rather than tightening.

- Deposits: 60% felt no review was necessary, although 23% believed that requiring full payment too far in advance is problematic – particularly among middle-aged travellers planning family trips.
- Modifications: 63% did not support stricter rules, but around one-third would accept a modest administrative fee for late changes.
- Cancellations: Only 13% viewed existing rules as too strict, confirming general acceptance of current terms.

Do you think SANParks' deposit rules should be reviewed?



In testing the four policy scenarios, respondents showed clear preferences for Scenario B, which retains the current framework but allows more lenient deposit timing for online bookings.



Scenario	Aligned to current reservation rules		New options	
	Traditional	Online	Lenient policy	Very lenient policy
	A	B	C	D
Deposit Requirement	Strict – 100% payment shortly after booking	Less strict - 50% shortly after booking and 50% one month before arrival	Less lenient – pay a portion shortly after booking, remainder on arrival	Lenient – majority of payment on arrival
Downgrades and Cancellations	Lenient - cancellation fees are incurred from 30 days before arrival	Lenient - cancellation fees are incurred from 40 days before arrival	Less strict - cancellation fees are incurred from 50 days before arrival	Strict - cancellation fees are incurred from 60 days before arrival
Modifications	No fee	No fee or small charge per amendment	Small charge for every amendment	Charges to apply for amendments
Refund of deposit	Refunded if outside 30 day period.	Refunded if outside 40 day period.	Refunded if outside 50 day period.	Refunded if outside 60 day period.
Possible booking experience	Accommodation should be more freely available for you to book as only committed clients will have booked.	Accommodation should be relatively freely available for you to book as most bookings will be by committed clients.	Likelihood increases of non-committed clients holding onto accommodation - less availability on the system.	Many non-committed clients holding on to accommodation for a long time, leading to late cancellations, while committed clients struggle to find accommodation and units not occupied.

*Waivers are granted based on reason i.e. in case of death, illness or travel restrictions (with proof)

Roughly 61% said they would book more often under Scenario A or B, while 31% indicated that none of the scenarios would alter their booking frequency. The potential downside of change was also measured: 35% said they would visit less often under the very lenient Scenario D, which they felt could compromise availability, and 28% would visit less if 100% prepayment became mandatory (Scenario A). These findings underline a delicate balance – clients appreciate flexibility but also value fairness and access.

Open-ended comments from approximately 160 respondents revealed recurring themes:

- A need for clarity and fairness around waivers, refunds and credits during unforeseen events such as illness, bereavement or travel restrictions.
- A preference for credit-on-account (valid for a fixed period) as an alternative to cash refunds.
- Requests for parity between online and traditional booking channels, particularly regarding deposit timing and payment windows.
- Frustrations with refund delays, inconsistent advice and the need for automated reminders before system-triggered cancellations.
- Concerns about block bookings and the perception that bulk holds by intermediaries reduce fair access for individual visitors.

Overall, clients supported the consistency of SANParks' system but asked for clearer communication, simplified processes and modest flexibility that would not jeopardise occupancy management.

Management implications

The results suggest that no major overhaul of SANParks' reservation terms is required, but several refinements could enhance client confidence and operational efficiency.

- Align deposit timing across booking channels, or explain differences clearly: Many clients favour a more lenient schedule for online payments; if full parity is impractical, the rationale and timeline should be transparently communicated.
- Publish a simple waiver and credit framework: Define qualifying events, documentation required and turnaround times; enable clients to choose credit-on-account where appropriate; and automate notifications before cancellations.
- Introduce a modest modification fee with safeguards: A small fee could deter excessive changes while exemptions for emergencies maintain goodwill.
- Manage block bookings transparently: Consider caps for intermediaries and enforce forfeits on late cancellations to protect fair access and occupancy levels.
- Monitor behavioural impacts of any rule changes: If deposit schedules are relaxed track availability, no-show rates and advance booking trends to ensure flexibility does not erode revenue or access.

These steps could enhance clarity, fairness and trust in SANParks' reservation system while maintaining the organisation's commitment to accessibility and financial sustainability.

Recommended citation: Slabbert, L. (2026). Visitor feedback on the SANParks' reservation deposit, modification and cancellation terms and conditions. In A Decade of Learning: Tourism Research in SANParks (2015–2025) (pp. 186-189). South African National Parks.

Related internal report: Slabbert, L. (2022). Research report: Visitor feedback on the SANParks' reservation deposit, modification and cancellation terms and conditions. South African National Parks.

Photo: /Ai /Ais-Richtersveld Transfrontier Park taken by Alistair Daynes



WILD CARD MEMBERSHIP SURVEY, 2022

Researcher: Liandi Slabbert, SANParks.

Introduction

The Wild Card Programme is SANParks' membership-based discount initiative that offers visitors unlimited access to participating national parks and partner reserves for a year in exchange for an upfront fee. The programme plays an important role in fostering repeat visitation, deepening emotional connections with nature, and generating predictable conservation revenue. Following the disruption of global travel caused by the COVID-19 pandemic, SANParks recognised the need to reassess how members' behaviour, satisfaction, and renewal intentions had evolved under new social and economic conditions. The Wild Card Membership Survey 2022 aimed to assess perceptions, usage patterns, and renewal intentions among Wild Card members, with a view to enhancing the programme's value and relevance.

Methods

Invitations were sent via email to both local and international members, and participation was voluntary and anonymous. A total of 7 440 responses were received, of which 7 257 were fully completed. The survey captured quantitative data on membership duration, visitation frequency before and after the pandemic, likelihood of renewal, and perceptions of value for money. It also included open-ended questions to gather qualitative insights on motivations, renewal barriers, and desired improvements.

Who responded?

The sample was dominated by local members (about 87%) residing primarily in Gauteng and the Western Cape, while international respondents represented key source markets such as the United Kingdom, Germany, and the Netherlands. Over half of all respondents had held a Wild Card for five years or longer, reflecting a mature and loyal membership base. While this lends credibility to the results from experienced members, it also introduces a potential positive response bias, as long-term members tend to express higher satisfaction and renewal intent than newer participants. Nonetheless, the large sample provided a good foundation for understanding membership behaviour and priorities.



Key findings

The survey results confirm that the Wild Card Programme remains highly valued and resilient, despite broader challenges affecting travel affordability and digital service expectations.

Membership duration and visitation

More than half of respondents had been members for over five years, with frequent park visitation remaining common among loyal members. However, overall visitation frequency declined compared with pre-pandemic levels, particularly among international members. Notably, 6 % of local and 11 % of international respondents were new members who joined during the pandemic period, reflecting the programme's continued ability to attract interest even under restricted travel conditions.

Motivations and barriers

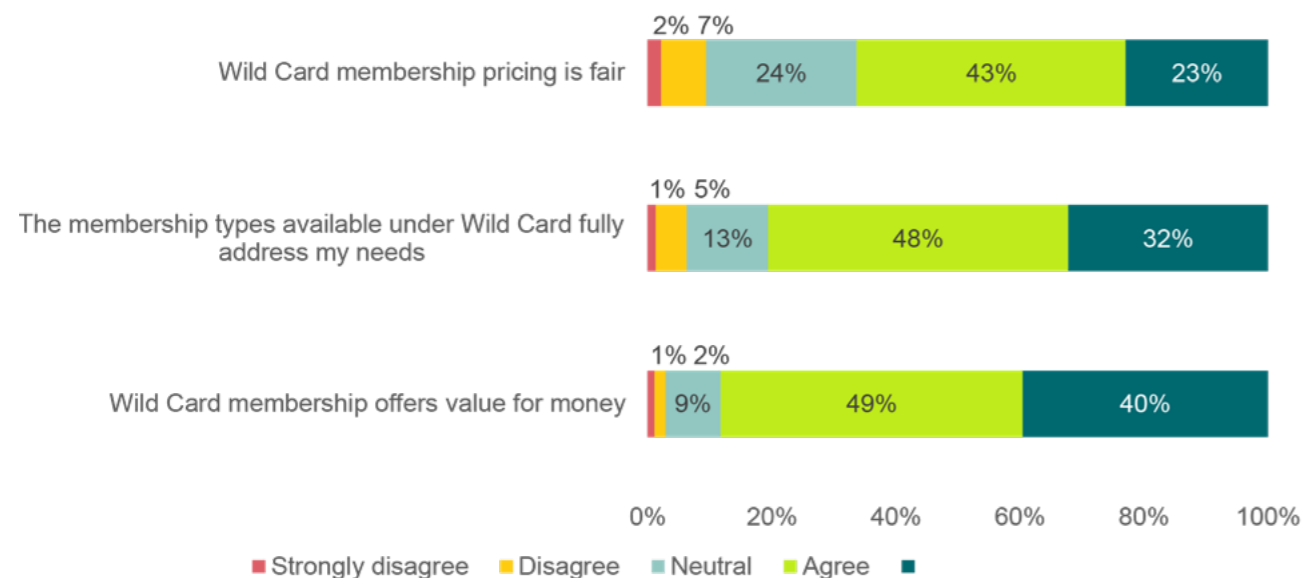
The strongest motivators for membership were financial and practical – saving on daily conservation fees, making regular visits more affordable, as well as access to multiple parks under a single pass. Non-renewal was rarely due to dissatisfaction; rather, respondents cited reduced travel frequency, financial strain, or system-related frustrations, such as missed renewal notices or card delivery delays.

Loyalty and satisfaction

The overall Net Promoter Score (NPS), where respondents indicate how likely they are to recommend the product to others, was 49, a good result by tourism industry standards. On an NPS scale of -100 to +100, positive scores are good; +50 and higher signals exceptional performance and a base of loyal promoters rather than simply satisfied visitors. International members recorded a notably higher NPS (62), while those with more than five years of membership reached 55, confirming that loyalty correlates with advocacy. Renewal intentions were equally strong: 89% of local and 76% of international members indicated they were likely to renew within 18 months, rising to 94% among long-term members.

Perceptions of value

An overwhelming 89% of respondents viewed the membership as good value for money, and two-thirds agreed that pricing was fair. While some called for senior or family discounts, the overall perception of affordability and fairness was positive.

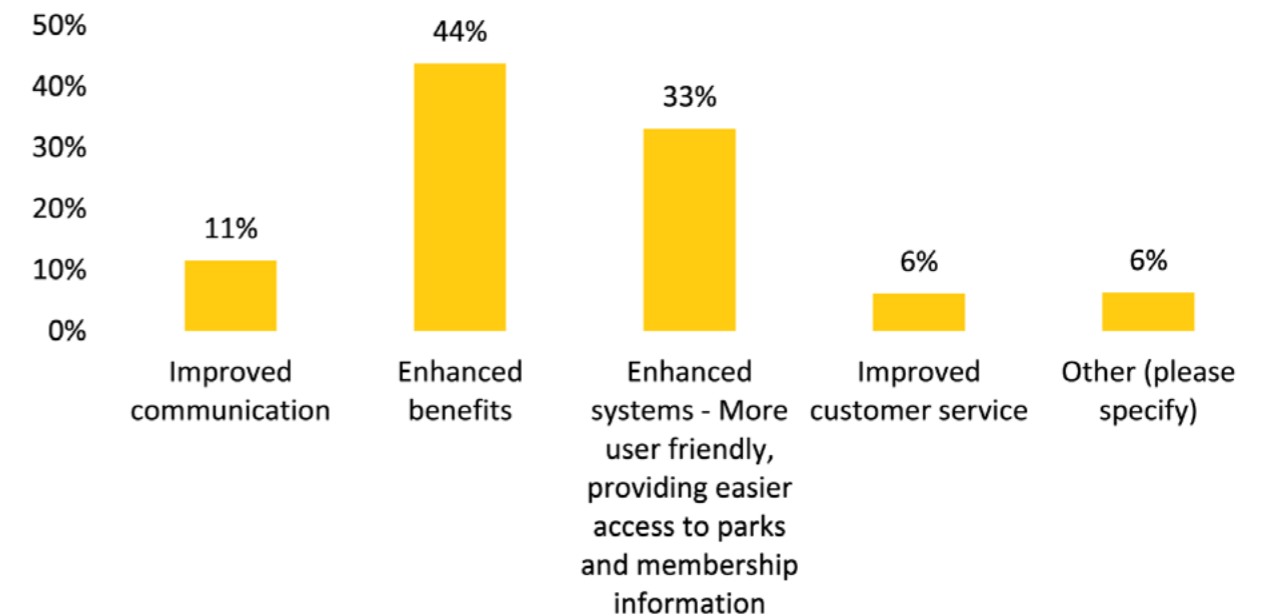


Perceptions of pricing, membership types and value (% respondents)

Desired improvements

Respondents prioritised enhanced digital systems and communication, the return of either a physical or digital card and a hard copy Wild magazine, better pricing flexibility, and more diverse membership options (for small households, pensioners, or adult dependents). There was also strong interest in expanding partner inclusion beyond SANParks to provincial parks, botanical gardens, and cultural attractions.

Which one of the following changes would most improve the Wild Card programme?



Changes that would improve the Wild Card Programme most

Future benefits

The idea of transforming the Wild Card into a points-based loyalty programme generated substantial enthusiasm. Nearly three-quarters (73%) supported introducing rewards or discounts on accommodation and activities, while more than half favoured a cross-partner reward system.

Management Implications

The Wild Card remains one of the organisation's most effective loyalty instruments, yet it must evolve to remain relevant in a fast-changing visitor environment.

Digital modernisation is essential. Members want easy, reliable online management of their accounts, from renewals to adding household members, and greater transparency around payment confirmation and expiry notifications. Investing in a robust customer-management platform and mobile functionality would enhance satisfaction and reduce administrative overheads and communication errors.

Pricing and diversity should remain central to strategy. While most members perceive the programme as affordable, SANParks can reinforce this through flexible membership tiers, off-peak discounts, and targeted incentives for pensioners, families, and first-time users. Balancing financial sustainability with inclusivity will be key to maintaining loyalty during periods of economic strain.

The demand for tangible and experiential value suggests that SANParks should consider reinstating the physical Wild Card (or a digitally stored version for smartphones) and the printed Wild magazine, with optional digital formats, to help preserve the sense of belonging and connection that members associate with the programme.

There is strong potential to evolve the Wild Card into a comprehensive loyalty ecosystem. By introducing reward points, exclusive benefits, and cross-partner promotions, SANParks can deepen member engagement and create a continuous value cycle that encourages renewals and higher spending. This evolution would transform the Wild Card from a static access product into a dynamic relationship platform that strengthens customer attachment, broadens conservation awareness, and sustains long-term revenue for South Africa's protected areas.

**In 2025, SANParks launched a new loyalty card (SANParks Rewards), aimed at rewarding repeat visitation by offering benefits and incentives that strengthen visitor engagement while supporting conservation and tourism revenue objectives.*

Recommended citation: Slabbert, L. (2026). Wild Card Membership Survey 2022. In A Decade of Learning: Tourism Research in SANParks (2015-2025) (pp. 190-194). South African National Parks.

*Related internal report:
Slabbert, L. (2022). Research report: Wild Card membership survey (2022). South African National Parks.*



4 REFLECTIONS AND RECOMMENDATIONS FOR FUTURE RESEARCH

The decade from 2015 to 2025 marked a transformative period in SANParks' tourism research agenda – shifting from ad hoc investigations to a more strategic, coordinated and multidisciplinary knowledge base. The research reflects not only a commitment to continuous learning but also an evolving understanding of the complex relationships between conservation, visitor experiences, tourism development, community benefits, and organisational performance.

Going forward, it will be essential to maintain the momentum built over the past decade through sustained investment in evidence-based decision-making and organisational research capacity. This includes strengthening the permanent research function within SANParks, expanding partnerships with universities and industry associations and experts, and ensuring that research outputs are actively translated into management practice. Continued collaboration across disciplines and institutions will reinforce the organisation's ability to generate timely, credible, and policy-relevant insights that inform both strategic and operational decisions.

Equally important is ensuring that the tourism research agenda remains aligned with the SANParks Vision 2040 strategy, which emphasises inclusive growth, sustainability, and long-term resilience. Future research must remain responsive to changing visitor needs, evolving travel motivations, and global tourism dynamics – from digital transformation and new market segments to the increasing demand for ethical, low-impact experiences. By aligning its research priorities with broader organisational and societal shifts, SANParks can continue to position itself as a forward-looking, learning organisation that bridges conservation, tourism, and community well-being.

Recommendations for future research

The synthesis of findings across themes also reveals key knowledge gaps and emerging areas of inquiry that merit deeper exploration. As SANParks enters its next research cycle guided by the Tourism Research Agenda, the organisation is well positioned to reflect on past progress and to define new priorities that will ensure tourism research continues to inform adaptive management, foster innovation, and promote inclusive growth across South Africa's protected areas.

The table below summarises the extent to which different research themes have been covered to date and highlights the knowledge gaps that SANParks aims to address in the coming years, as identified in the Tourism Research Agenda.

RESEARCH THEME	COVERAGE TO DATE	NOTABLE GAPS TO CLOSE NEXT
Resilient and adaptable tourism	Medium	Park-level resilience, diversification of revenue, scenario planning, business continuity strategies, digital innovation adoption including virtual tourism.
Value to society	High	Deeper understanding of health and well-being benefits of park experiences, including spiritual and restorative effects, wellness tourism opportunities, youth development.
Responsible and regenerative tourism	Medium	Carbon footprint tracking, alternative transport models, renewable energy solutions, and waste reduction systems, staff and visitor pro-environmental behaviour, active ecotourism, adapting PPP models to better mentor and integrate local communities.
Understanding and attracting customers	High	Understanding younger generations and non-returning visitors, pricing experiments including dynamic pricing, marketing effectiveness, competitive intelligence.
Managing visitors and experiences	High	Assessing visitor impacts, growing cultural and regenerative tourism offerings, evaluation of interpretation centres and how welcoming they are to different cultures, cross-cultural visitor experiences, how attachment and loyalty form among new audiences, mindfulness-based visitor engagement.
Operational efficiency	Low-Medium	True cost of tourism services, maintenance resourcing, PFMA bottlenecks, staff productivity assessments, cost-reduction innovations, competency mapping, technology ROI.



Photo: Tankwa Karoo National Park taken by Rudolph de Girardier



Recommendations for improving knowledge utilisation

Strengthening the use of research in decision-making requires intentional design and collaboration between researchers and practitioners. Findings should be communicated in concise, accessible formats that clearly outline operational implications and actionable steps. Direct engagement, through workshops, feedback sessions, or collaborative implementation initiatives, helps to translate abstract insights into tangible practice. A more systematic approach to accountability is also needed: integrating research-based actions into team objectives, work plans, or performance indicators can ensure follow-through. Finally, sustained support from senior leadership is essential to embed a culture of learning where research evidence is not only shared but actively used to guide strategic and day-to-day management across the organisation.

Sustaining a culture of evidence-based decision-making

Evidence-based decision-making calls for an organisational culture that values inquiry, reflection, and adaptive learning. By embedding evidence-based decision-making into everyday operations, SANParks can ensure that research becomes an ongoing feedback loop rather than a one-off exercise. This involves recognising research not only as a support function but as a strategic asset that enhances the organisation's capacity to innovate, manage risk, and respond to change. Continued investment in internal research capacity, regular knowledge exchange between researchers and managers, and leadership commitment to data-informed planning will be key to sustaining this culture of learning and ensuring that tourism research delivers lasting value for protected area management.

Acknowledgements

SANParks extends its sincere appreciation to the many researchers, postgraduate students, and academic partners who have collaborated with the organisation over the past decade. Your dedication, curiosity, and commitment to advancing knowledge have played a pivotal role in shaping a stronger, evidence-based approach to tourism management across the national park system.

We also wish to thank the park management teams and operational staff throughout South Africa's national parks for their continued support in facilitating fieldwork, engaging with research findings, and translating insights into action. Your cooperation and practical contributions have ensured that research remains grounded in the realities of park management and visitor experience.

Finally, we express heartfelt thanks to the many visitors and community members who participated in surveys, interviews, and discussions. Your willingness to share your perspectives and experiences has enriched our understanding of national park tourism and helped guide improvements that benefit both people and nature.





South African
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