



South African
NATIONAL PARKS

THE SOCIO-ECONOMIC BENEFITS OF THE COMMERCIALISATION OF TOURISM IN SOUTH AFRICAN NATIONAL PARKS

Summary
2024/25



Prepared by



ACKNOWLEDGEMENT

This study, commissioned by South African National Parks (SANParks), evaluates the socio-economic benefits of the tourism commercialisation strategy implemented across various national parks. We extend our sincere gratitude to the project management team, comprising the Tourism Research and Business Development Units at SANParks, for their diligent oversight in ensuring the study achieved its intended outcomes in a timely manner. We also wish to thank the park management and socio-economic transformation representatives whose participation in workshops provided invaluable input into the study's strategic recommendations.

To ensure the study accurately reflects the aggregated sentiments of participants while safeguarding sensitive information, the services of The Collective Impact Advisory and International Conservation Services were procured. Special recognition goes to the team at The Collective Impact Advisory - spearheaded by Dr. Kíera Schoeman, alongside Chanel Barnard and Dr. Andre Gouws - who expertly undertook the data collection, interviews, analysis, and reporting.

Finally, the success of this study would not have been possible without the dedication of the Tourism Concessions. Their investment in managing SANParks' world-class experiences is truly invaluable. Beyond their significant contributions to the economy and job creation, these concessions drive vital impact investment into local communities through enterprise, skills, and community development programmes, all while championing an ESG approach through sustainable and responsible practices. Their participation in this study was instrumental in showcasing the immense value of commercialising state-owned protected areas.

EXECUTIVE SUMMARY

This study assesses the socio-economic benefits arising from the commercialisation of tourism in South African National Parks through Public-Private Partnerships (PPPs). Commissioned by South African National Parks (SANParks), the analysis evaluates the economic, social and transformation impacts generated by tourism concessions during the 2024/25 financial year.

Strategic Context

SANParks' commercialisation programme is positioned as a key driver of Vision 2040, which seeks to establish Mega Living Landscapes that integrate conservation



sustainability with inclusive economic growth. Through structured PPPs, SANParks leverages private capital, operational expertise and market access to enhance visitor experiences, generate conservation funding and stimulate local economic participation. Commercialisation, therefore, serves not only as a revenue instrument but as a transformation mechanism that embeds conservation within broader socio-economic systems.

Economic Contribution

The findings demonstrate that tourism concessions make a substantial contribution to SANParks' financial sustainability and to the broader South African economy.

In 2024/25, SANParks exceeded the R4 billion revenue mark for the first time, with 75% derived from commercial activities. Concession income reached R237 million, reflecting sustained post-pandemic growth. Beyond concession fees, visitor spending at concession sites amounted to approximately R2.38 billion, injecting significant capital into local economies.

The economic impact modelling showed that concession operations generated:

- **R6.2 billion** in total national production (direct, indirect and induced effects).
- **R2.79 billion** in total gross value added (GVA).
- **10,509 full-time equivalent jobs** supported across skilled, semi-skilled, unskilled and informal labour groups.
- **R224 million** in additional tax revenues to government.

These impacts extend beyond core tourism industries into agriculture, manufacturing, utilities, trade, transport and professional services, confirming the multiplier strength of biodiversity-based tourism in securing natural capital.

Provincial Economic Impact

The economic benefits are widely distributed across provinces:

- The Greater Kruger, straddling the provinces of Mpumalanga and Limpopo, captures the largest share, with R655 million in total GVA and 3,757 jobs supported. This highlights the strong integration of SANParks concessions with Mpumalanga's wider economy, extending economic activity well beyond core tourism services.
- The Western Cape benefits strongly through supply-chain and service linkages, supporting R352 million in total GVA and 3,308 jobs supported. The employment profile points to the Western Cape's role in sustaining both higher-skill service functions and labour-intensive activities linked to food processing, logistics, trade and business services.
- The Eastern Cape, Limpopo and Northern Cape record smaller but developmentally significant impacts, particularly through labour absorption and rural income support. While modest, these fiscal effects underscore the broader socio-economic relevance of SANParks tourism concessions within smaller provincial economies.

Tourism concessions, therefore, function as national production catalysts, linking remote conservation areas to provincial and national economic networks. The employment profile underscores the importance of SANParks concessions

not only for professional and technical occupations, but also for labour-absorbing and livelihood-supporting activities. These results highlight opportunities for SANParks and partners to act as development catalysts, particularly when combined with targeted local procurement, skills development and enterprise support initiatives.

Transformation, Ownership and Direct Employment

The concession model demonstrates strong alignment with transformation objectives. Concessions reported:

- 2,393 permanent jobs and 420 temporary jobs.
- 95% Black employment representation and 54% Black women representation.
- 85% of employees sourced from within a 50 km radius of operations.

Ownership structures among Qualifying Small Enterprises (QSEs) and Large Enterprises (LEs) exceed Tourism BEE sector code targets, with several entities incorporating land claimant and community shareholding models.

Extensive skills development, experiential training, internships and bursary programmes strengthen long-term employability and succession planning within rural economies.

Enterprise Development and Local Procurement

Concessions demonstrate strong localisation effects:

- 78% of operational expenditure is spent within the local province.
- 96% of procurement is sourced within South Africa.
- Significant investment in enterprise development initiatives and community supplier incubation.

Over R91.9 million in new infrastructure investment was undertaken in 2024/25 alone, reinforcing long-term destination competitiveness.

Visitor Market and Brand Positioning

The tourism market shows strong recovery post-COVID-19, with flagship parks such as Kruger exceeding pre-pandemic visitation levels. Concessions play a critical role in attracting high-spend international markets, enhancing accommodation quality, diversifying experiences and strengthening global brand equity.

Concession operators invest heavily in marketing and international trade relationships, acting as long-term ambassadors for SANParks destinations. Case studies demonstrate how concession partnerships elevate conservation areas into globally competitive tourism products.

Sustainability

A key success in community upliftment is the focus on long-term investments, often channelled through targeted programmes and funds. Concessions actively support

local education by funding teacher salaries, building classrooms, and providing study sponsorships, while also directing social investments toward the elderly. Furthermore, they continuously uplift their immediate communities by fulfilling numerous small donation requests and sponsoring local charity events.

On the environmental front, operators demonstrate strong responsibility through heavy investments in green infrastructure, such as solar plants, recycling and water purification systems. They maintain strict environmental due diligence through annual inspections and actively participate in conservation efforts, including clearing invasive species and supporting SANParks. This consistent dedication to sustainable practices has even earned some operators Fair Trade Accreditation.

Key Insights

The study confirms that:

- Commercialisation through PPPs generates strong net positive socio-economic returns.
- Tourism concessions are labour-intensive and inclusive, supporting semi-skilled, unskilled and informal employment.

- Local procurement and enterprise development significantly enhance multiplier effects.
- Private sector investment strengthens SANParks' financial sustainability while protecting biodiversity assets.

However, opportunities remain to further streamline administrative processes, strengthen integrated marketing, deepen local supplier development and optimise infrastructure maintenance coordination.

Conclusion

The commercialisation of tourism in South African National Parks delivers measurable economic, fiscal and social returns that extend well beyond concession fees. It stimulates production, supports livelihoods, advances transformation objectives and reinforces conservation funding.

The evidence confirms that PPPs are not merely operational arrangements, they are strategic instruments for inclusive conservation-led growth. By strengthening collaborative partnerships, improving local value retention and aligning market development with community empowerment, SANParks can further enhance the role of tourism concessions as catalysts for resilient Mega Living Landscapes under Vision 2040.



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1. TOURISM CONCESSIONS PURPOSE

1.1. Strategic Context

SANParks' commercialisation programme is a strategic catalyst for delivering the ambitions of Vision 2040. By unlocking the economic value of protected areas in a responsible and inclusive manner, commercialisation transforms conservation landscapes into engines of growth, resilience and shared prosperity. It is through well-structured partnerships that the broader aspirations of Vision 2040 become practically achievable and financially sustainable.

At the core of this approach is the understanding that conservation must generate tangible socio-economic value to remain sustainable for future generations. Through tourism concessions, SANParks activates and optimises underutilised state assets, diversifies its tourism offerings and stimulates local economic participation. This deliberate commercial strategy strengthens the financial sustainability of the national parks while expanding opportunities for communities, entrepreneurs and investors within the surrounding landscape.

Commercialisation directly advances the Vision 2040 concept of Mega Living Landscapes (MLLs) by embedding conservation areas within broader ecological and socio-economic systems. Revenue generated through concessions is reinvested into biodiversity protection, infrastructure maintenance and ecosystem management, ensuring that environmental sustainability remains

the foundation of long-term economic activity. At the same time, inclusive commercial models create pathways for community ownership, skills development and enterprise growth, thereby strengthening the social fabric that underpins resilient landscapes.

The SANParks Business Development Unit plays a pivotal role in operationalising this model under the Strategic Plan 2025–2030. Through the structured rollout of tourism concessions, the Unit enhances destination competitiveness and visitor experience while ensuring that local communities meaningfully benefit from commercial activity. The commercialisation strategy therefore serves not merely as a revenue tool, but as an instrument for transformation, inclusion and sustainable growth.

Public-Private Partnerships (PPPs) are the primary mechanism for unlocking this value. PPPs enable SANParks to:

- Generate additional revenue streams dedicated to conservation funding.
- Optimise the utilisation of underperforming state assets.
- Accelerate industry transformation and broaden participation.
- Reduce the delivery costs of tourism services and amenities.
- Leverage private capital, innovation and specialised expertise.
- Improve infrastructure development, operational efficiency and maintenance standards.

Through the PPP framework, operational and financial risks are appropriately allocated to private partners, allowing SANParks to focus on its core conservation mandate while ensuring professional, commercially viable service delivery. In this model:

- Private partners acquire rights to use state property for defined commercial purposes.
- They assume financial, technical and operational risks associated with those activities.
- They earn returns linked to performance and market demand.

Beyond concession fees, the commercialisation programme delivers broader socio-economic returns that are central to Vision 2040's inclusive agenda. These include:

- **Skills development:** Structured skills transfer, vocational training and employment pathways for local communities.
- **Enterprise development:** Strengthening supply-chain linkages and supporting emerging local businesses.
- **Land claimant beneficiation:** Inclusion of land claimants in sustainable and viable shareholding models.
- **Socio-economic development:** Targeted initiatives that uplift neighbouring communities and stimulate regional growth.

Through responsible commercialisation, conservation areas evolve into dynamic, multifunctional spaces that integrate ecotourism, regenerative land use and sustainable enterprise. In doing so, commercialisation does not merely support Vision 2040, it actively drives its realisation by creating financially viable, socially inclusive and ecologically resilient landscapes where people and nature thrive together.

1.2. Commercialisation through PPPs

SANParks plays a pivotal role in South Africa's ecotourism landscape, drawing both international and domestic visitors. Its strong ecotourism operations generate significant self-sustaining revenue, which is reinvested into conservation. Thus, tourism directly supports the protection of biodiversity.

Since 1998, SANParks has strategically reduced its reliance on state funding by adopting a commercialisation model. Under this approach, selected ventures are operated by private sector partners, but within strict biodiversity safeguards. This ensures that conservation assets deliver risk-free financial and economic returns for SANParks while maintaining the ecological integrity of these protected areas.

The organisation's achievements highlight the success of this strategy. More than 50 Public-Private Partnerships (PPPs) have been established; for example, launching luxury five-star lodges aimed at the international market, while simultaneously enhancing restaurants, retail outlets and visitor activities. These improvements have elevated the overall visitor experience, reinforcing SANParks' reputation as a leader in sustainable tourism.

The PPP model is designed to promote the sustainable management of national parks while generating revenue to support conservation initiatives and stimulate local economic growth. Through PPPs, SANParks harnesses private sector expertise and investment to develop, operate and manage tourism and related commercial ventures within the parks. The provision of the PPP agreement needs to

ensure that the private party provides a quality visitor experience in a responsible manner while contributing to the financial sustainability of the national parks. Furthermore, uplifting local communities through employment, skills development, enterprise development and ownership structures.

SANParks commissioned a study to assess the socio-economic benefits of commercialising tourism activities in the national parks through concessions. This study considered the parameters of the PPP Agreement and expanded on the physical implementation of the transformation and empowering activities undertaken by the concessions. The results of the study highlighted the positive impacts of the concessions while identifying the challenges experienced in obtaining these benefits.

Therefore, the purpose of the study is to:

“Conduct a study of the socio-economic benefits of the commercialisation of tourism in South African National Parks.”

1.3. Study Approach

The study aimed to provide insight into the socio-economic benefits generated by SANParks concessions during the financial year (2024//25). Thus, showcasing the value these initiatives generated for the local economy and communities, while considering the negative impacts and challenges experienced with the implementation of the PPP models. The outcome of the study yields positive insights and strategic recommendations to improve SANParks’ PPPs and contribute to the institution’s mandate, financial sustainability and community inclusion under Vision 2040.

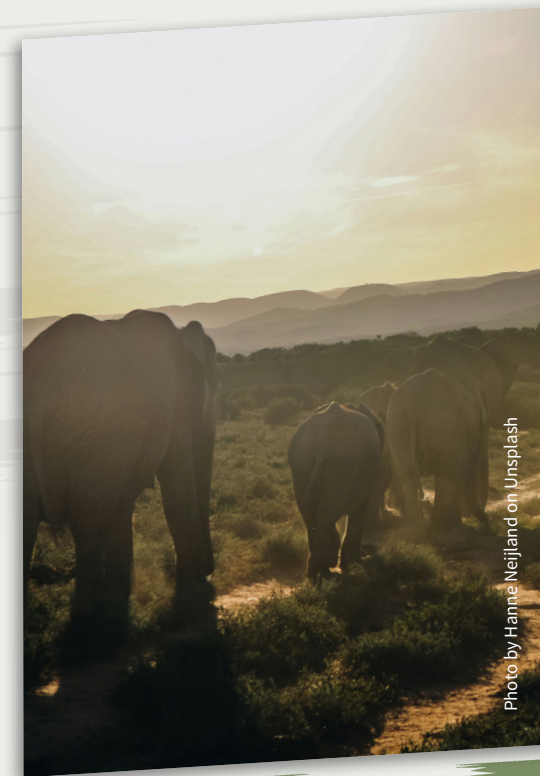
The following research objectives were addressed:

- Revenue-generating activities in the national parks.
- The economic impact of the concession activities in the national parks.
- Ownership structure and employment demographics in terms of the BEE scorecards and locality.
- Skills development undertaken by the concessions to empower marginalised groups.
- Operational resources and needs for enterprise development.
- Involvement in social and environmental initiatives.
- Challenges and opportunities for achieving socio-economic benefits.
- Best practice activities of commercial operations that maximise socio-economic benefits for local communities.
- Recommendations to improve the flow of benefits through PPPs and to minimise negative effects.

The study consisted of two phases. Firstly, the data gathering and analysis required the conceptualisation of the study indicator framework, which guided the collection of quantitative and qualitative information. The data collection process required concessionaires to complete Input Sheets with information relating to their revenue generation, target market, operational expenditure, BEE obligations and social investment. Parallel to the quantitative research, one-on-one interviews were hosted with concession representatives. The interview focused on the challenges, opportunities and success stories across SANParks’ concession operations. Discussions addressed PPP contractual obligations and strategies for market access, attraction and retention. Efforts to enhance visitor experience and operational efficiency were highlighted, along with approaches to staffing requirements and succession planning. The interviews also covered procurement practices and enterprise development, as well as initiatives in capacity building, skills development, and informal or experiential learning. Community upliftment and involvement were explored as a cornerstone of inclusive growth, while conservation activities and environmental awareness efforts were underscored in terms of SANParks’ commitment to biodiversity protection. The results revealed the socio-economic impact that determined the true value of commercialising the national parks. Furthermore, key insights were drawn from the success stories and lessons learnt from operating PPPs within national parks.

The socio-economic benefit indicators are limited to information that was provided by the concessions under the PPP agreement, including financial information, BEE obligations, social investment, and associated operational

activities. The quantitative information provided by concessions was for the 2024/25 financial year. The socio-economic impact results are reported in an aggregated format and do not unveil individual concessions results unless permitted. The economic impact modelling is limited to yielding results at a national and provincial level. The case studies presented in the publishable report are limited to selected concession success stories. The study does not account for the socio-economic impact of the broader tourism function of SANParks in terms of the primary data collection, analysis and reporting. However, the broader operational environment for the concessions and the national parks was considered within the study.



1.4. Concessions Profile

There were 41 concessionaires that participated in the study, which is within the 90% confidence level for the study sample size.

The respondents represented different sizes of enterprises, from exempted micro enterprises (EME) to qualifying small enterprises (QSE) and large enterprises (LE). Over 37% of responses were from restaurants, followed by lodges (32%) and activities (12%).

The majority of respondents are located within Mpumalanga (51%) and Limpopo (7%), as they operate from the Kruger National Park. The Western Cape represents 27% of respondents, followed by the Eastern Cape (10%).

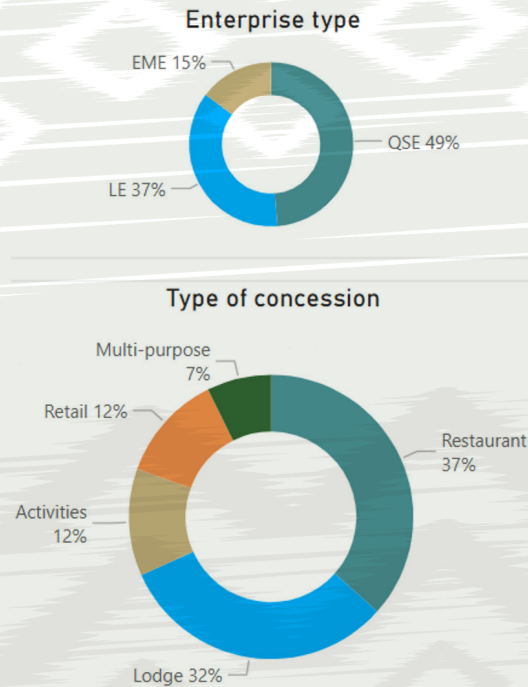


Figure 1: Respondent distribution

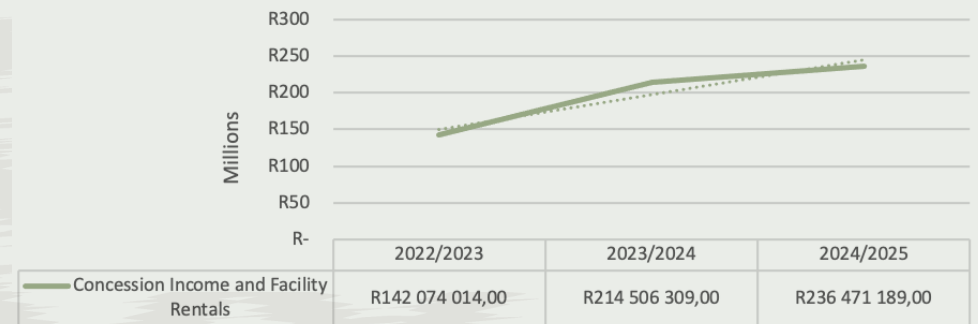
2. ECONOMIC CONTRIBUTION

2.1. SANParks Revenue Generation

SANParks achieved a historic financial milestone in the 2024/25 period, reporting an 11% increase in revenue as earnings grew from R3.67 billion to R4.1 billion. This represents the first time the organisation has surpassed the R4 billion threshold, a feat largely attributed to successful commercialisation efforts. Specifically, 75% of this total revenue was derived from commercial activities, demonstrating the significant impact and effectiveness of the organisation's strategic focus on business-driven income streams.¹ A primary driver of this success was the revenue from conservation fees, including Wild Card sales, which rose by 13% to reach R960 million. This specific revenue stream significantly exceeded its budgeted target of R785 million by 22%.

In addition to the growth in direct commercial revenue, income from private concessions has shown a strong and consistent upward trend over the last three financial years. For the 2024/25 period, concession income reached R237 million, marking a notable 10% increase from the R215 million recorded in 2023/24. This growth is even more significant when compared to the 2022/23 figure of R142 million, representing a substantial recovery and expansion of private-sector contributions to SANParks' financial sustainability.

Table 1: SANParks BDU Concession Income



Source: SANParks BDU

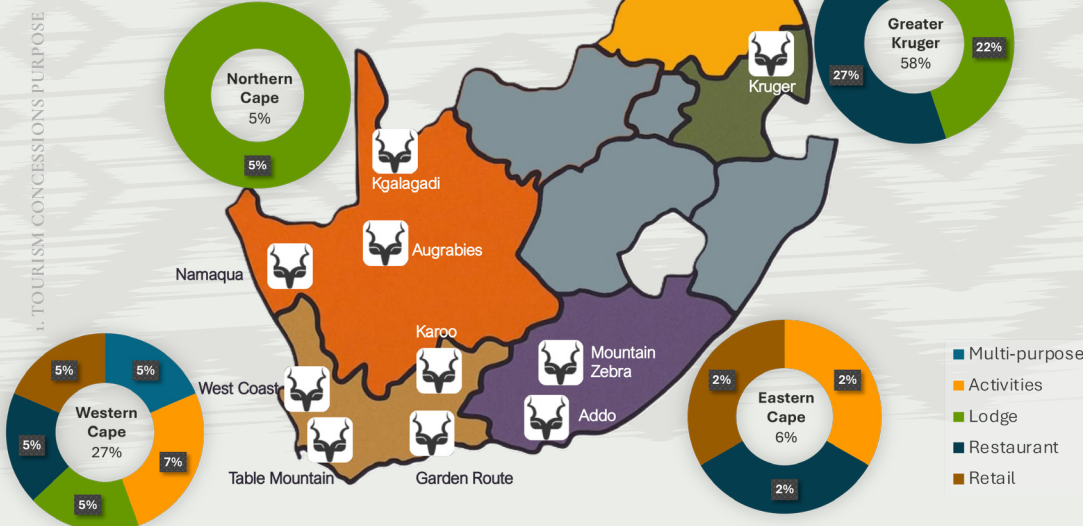


Figure 2: Respondent provincial location

¹ SANParks. 2025. SANParks Hits R4-Billion Revenue Mark for the First Time. [Available at: <https://www.sanparks.org/news/sanparks-hits-r4-billion-revenue-mark-for-the-first-time>]

2.2. Visitor Spending

In addition to the direct income generated for SANParks, private concessions act as significant economic engines by driving substantial visitor spending that flows into the local economy. These partnerships extend beyond simple rental or fee structures; they create a secondary economic impact through the procurement of goods, services and job creation.

Due to marketing efforts, unique experience offerings and hospitality services provided by the concessions, visitor spending generated by the concessions within the national parks was R2.38 billion.

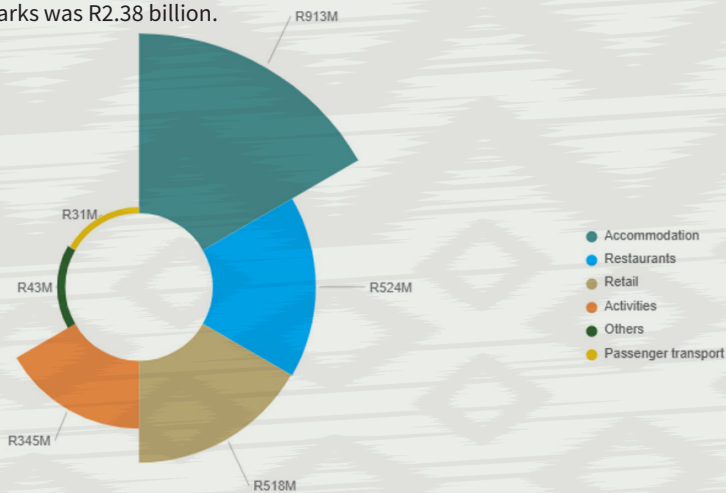


Figure 3: Visitor spending distribution

Disclaimer: The spending data provided aggregates visitor expenditure by activity type without distinguishing between different enterprise types.

The largest value was for accommodation, representing 39% of visitor spending, followed by restaurants (22%) and retail (22%), which are viewed as core services for tourists. The spending on other items like activities (15%) and transport (1%) at these concessions are seen as “nice-to-have”.

2.3. Economic Impact of Concessions on the South African Economy

In the context of the commercialisation of tourism and PPPs in SANParks, an intervention such as the development or operation of lodges, concessioned tourism

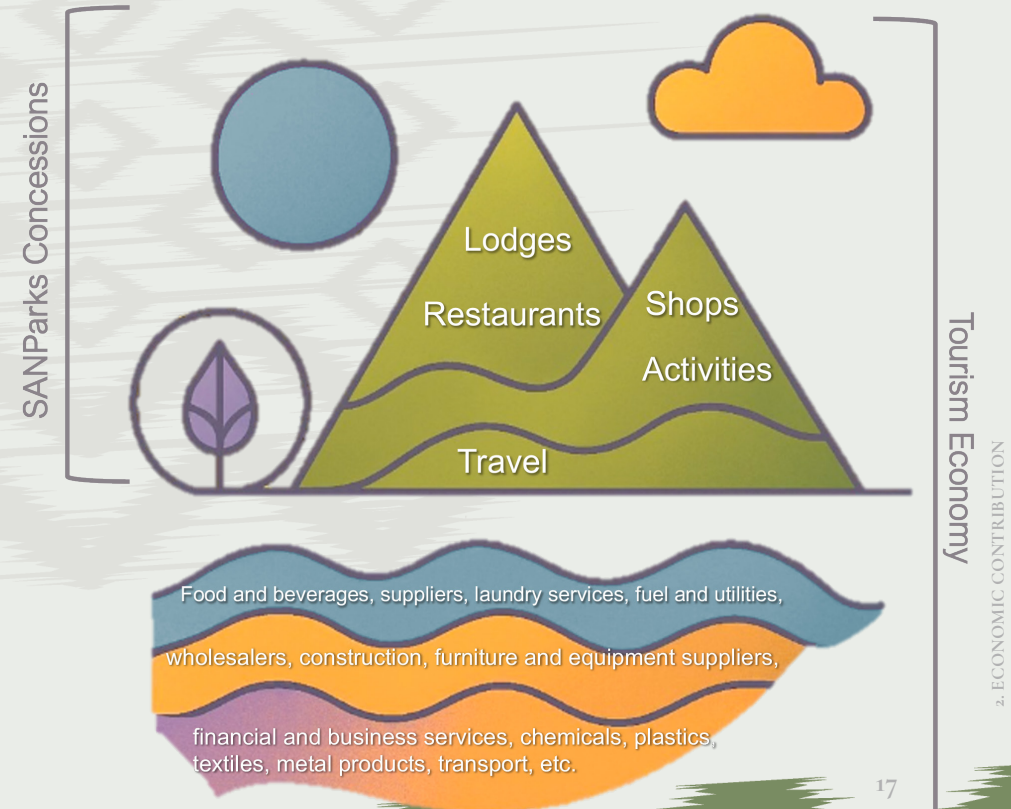
Total visitor spending at the concessions
R2.38 Billion

services or supporting infrastructure, enters the circular flow primarily through firms. New or existing tourism enterprises demand labour, construction, utilities, food products, transport and professional services. This immediately increases production and employment (the direct effects). As tourism entities purchase inputs from other sectors, these supplying industries expand their own production and employment (the indirect effects). The wages and profits generated through these activities then flow back into households, who spend a portion of this income on consumer goods and services, stimulating further rounds of economic activity (the induced effects).

The socio-economic impact of SANParks tourism PPPs, therefore, depends not only on the size of the investment or visitor spending but on how deeply and

locally it is embedded in this circular flow. The more that concessionaires source goods and services locally, employ local labour, and reinvest earnings within South Africa and surrounding communities, the stronger the multiplier effects become. Leakages, such as imported inputs or profits remitted elsewhere, interrupt the circular flow and weaken the overall impact. Input-output and SAM-based impact models formalise this diagram by quantifying these linkages, enabling the estimation of how a tourism intervention in national parks translates into changes in output, employment, incomes and broader socio-economic outcomes across provinces and sectors.

The following diagram illustrates how tourism activity extends far beyond the visible “frontline” tourism industries and permeates the wider economy.



At the apex of the pyramid are the core tourism industries, such as transport, accommodation, tour operators, restaurants, retail, entertainment, recreational activities and related services. These are the sectors that interact directly with visitors and where tourism spending is first recorded. When SANParks tourism concessions expand operations or attract visitors, new expenditure enters the economy through these industries.

Beneath the surface, however, these tourism industries rely on a broad network of suppliers and support industries, represented in the lower layers of the pyramid. These include food and beverage suppliers, laundry services, fuel and utilities, wholesalers, construction, furniture and equipment suppliers, financial and business services, chemicals, plastics, textiles, metal products, transport administration and many others. As the tourism sector's output expands, they increase purchases from these upstream industries. These responses constitute the indirect effects of tourism spending and reflect the depth of tourism's integration into the national and provincial production system. The more extensive and locally embedded these supply chains are, the larger the indirect component of the multiplier. The multiplier process extends further through household income and consumption. As both tourism entities and their suppliers expand production, they pay additional wages, salaries and operating surpluses. These incomes flow into households, who in turn spend a portion on consumer goods and services across the economy. This additional consumption supports further production in sectors such as retail, transport, personal services, food production and manufacturing. These induced effects represent the closing of the loop between production and

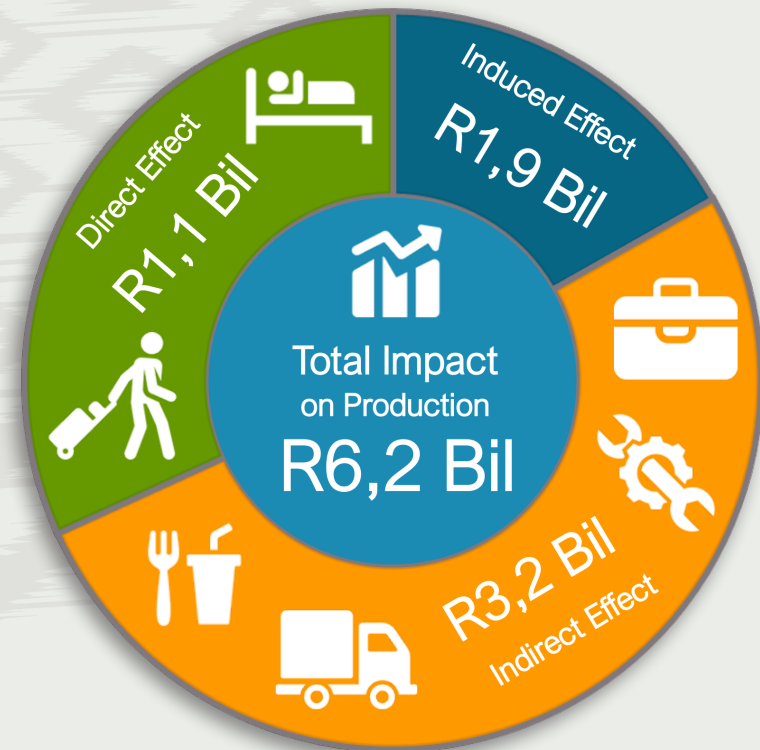
consumption, and they explain why the total economic impact of tourism interventions is larger than the initial visitor or investment spending alone.

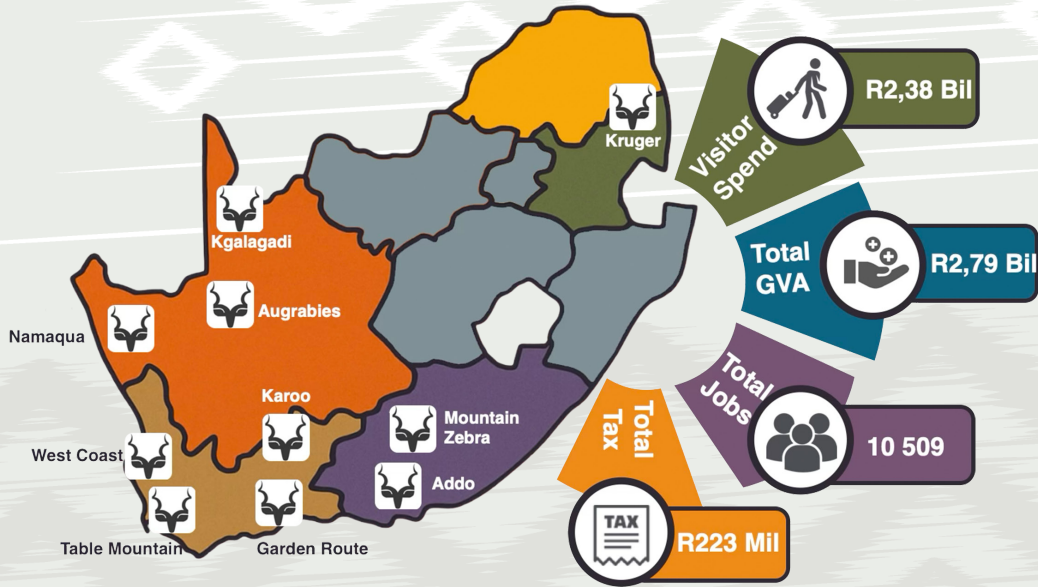
The economic impacts estimated by the models are reported in terms of direct, indirect and induced effects, reflecting successive rounds of activity generated by tourism interventions. Direct impacts arise from the immediate increase in production, employment and income within sectors that are directly affected by SANParks tourism PPPs, such as accommodation, food services, transport and related tourism industries. Indirect impacts capture the additional economic activity generated along supply chains as these sectors purchase goods and services from upstream industries, including agriculture, manufacturing, utilities, construction and business services. Induced impacts result from the spending of wages and other incomes earned by households as a consequence of the direct and indirect effects, which stimulates further demand across the broader economy. Together, these three layers of impact describe how a tourism intervention propagates through the economic system, providing a comprehensive measure of the total socio-economic footprint of the PPPs.

Economic Production and Gross Value Added

The results from the economic impact modelling reveal that the concessions in SANParks have a positive economic impact on the South African economy. During the 2024/25 financial year, the concessions in South Africa had a direct and indirect impact of R4.3 billion on economic production. Furthermore, R1.9 billion was generated by the induced impact. In total, these operations raised the level of production by approximately R6.2 billion.

The modelling results indicate that the commercialisation of tourism through SANParks PPPs generates substantial additional income and value creation within the South African economy. The total gross value added (GVA) increased by R2.79 billion, reflecting the combined expansion in labour compensation, operating surpluses and production-related taxes. Of this, additional compensation of employees amounted to R1.33 billion, demonstrating the strong labour-income channel through which tourism investment and visitor activity stimulate the broader economy. At the same time, firms realised an estimated R1.46 billion in additional gross operating surplus (GOS), indicating meaningful gains in business income, profitability and returns to capital associated with the expansion of tourism-related production and its supply chains.





Full-Time Equivalent of Employment

These increases in production and income translate into significant employment impacts. The intervention is estimated to support approximately 10,509 jobs across the economy. Importantly, these employment effects are widely distributed across skills categories, reflecting tourism’s relatively labour-intensive and inclusive character. Approximately 1,974 skilled jobs are generated, alongside 4,121 semi-skilled jobs and 1,729 unskilled jobs, indicating strong absorption capacity across the formal labour market. In addition, an estimated 2,685 informal jobs are supported, highlighting the role of tourism-driven demand in sustaining livelihoods in informal and small-scale economic activities that are often closely linked to hospitality, trade, transport and personal services.

Tax Contribution

The tourism injection in economic activity also strengthens the public finance base. The model estimates that the intervention generates R161 million in additional taxes on products (such as VAT and excise-type revenues) and R62 million in taxes on production (including other production-related levies), resulting in total additional tax revenues of approximately R224 million. These fiscal gains reflect the way in which increased production, consumption and business activity feed back into government revenues, supporting the state’s capacity to fund public services, infrastructure and conservation-related programmes.

Imports

The results indicate an increase of approximately R415 million in imports, reflecting the partial reliance of

tourism and its supply chains on goods and services sourced from abroad. While this represents a leakage from the local circular flow, the scale of domestic value added and employment creation substantially exceeds the import content, confirming that tourism PPPs in SANParks generate a strong net positive socio-economic impact. Strengthening local procurement, enterprise development and regional supply chains would further enhance these impacts by retaining a larger share of expenditure within South Africa and within provinces hosting national parks.

Sectoral Impact

At a national level, the sectoral distribution of impacts demonstrates that SANParks tourism concessions generate a broad-based contribution across the South African economy, extending well beyond core tourism activities. The strongest effects are concentrated in hotels (tourist accommodation) and restaurants (disaggregated from the original “catering and accommodation services (SIC 64)” sector), reflecting the central role of accommodation and food services in translating visitor spending into economic output. The separation of tourist accommodation and restaurants provides additional analytical insight, showing that accommodation services are a particularly strong driver of value creation and supply-chain demand, while restaurant and catering activities generate wide employment-intensive linkages into agriculture, food processing, trade and logistics. These core tourism sectors are closely followed by substantial impacts in wholesale and retail trade, transport and storage, communication, and community and personal services, underscoring the importance of mobility, distribution networks and visitor-serving industries.



Figure 4: Sectors benefitting from concessions in South Africa

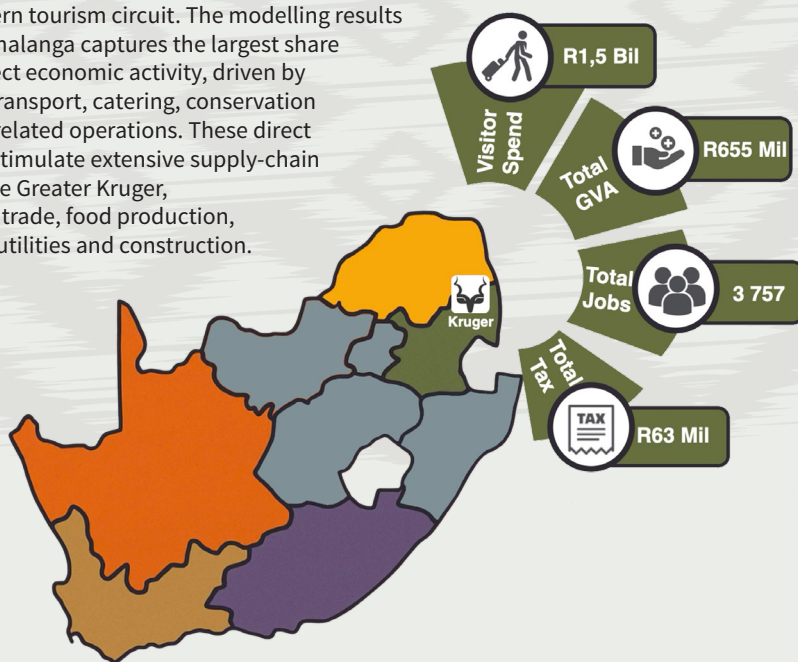
Beyond the immediate tourism economy, the national results reveal significant impacts across a wide range of upstream and enabling sectors. Notable responses occur in food and beverage manufacturing, petroleum and chemical products, electricity and gas, construction, professional and business services, and financial services, illustrating how SANParks concessions stimulate production systems that supply energy, infrastructure, processed goods and specialised services. These impacts confirm that tourism concessions operate as an integrating force within the national economy, linking rural conservation areas to industrial and service centres.

Together, these patterns indicate that SANParks tourism concessions function not only as destination-based activities but also as catalysts for national production networks, supporting employment, incomes and enterprise activity across a diverse set of economic sectors.

2.4. Economic Impact at a Provincial Level

Greater Kruger Economy

The Kruger National Park is located within the Greater Kruger Protected Area Network, straddling the provinces of Mpumalanga and Limpopo. Mpumalanga emerges as the primary beneficiary of tourism commercialisation, reflecting its central role in South Africa's nature-based tourism economy and the concentration of SANParks tourism assets within the province. Limpopo's impacts reflect the province's role as a complementary tourism and conservation economy closely linked to Mpumalanga and the broader northern tourism circuit. The modelling results indicate that Mpumalanga captures the largest share of direct and indirect economic activity, driven by accommodation, transport, catering, conservation services and park-related operations. These direct tourism activities stimulate extensive supply-chain responses within the Greater Kruger, particularly across trade, food production, business services, utilities and construction.



Within the Greater Kruger, these contributions from the concession operations and the associated tourism activities support approximately R2.78 billion in economic output in the province, of which R616.4 million arises directly from tourism and concession activities. A further R2.05 billion is generated through inter-industry supply-chain linkages. This highlights the strong integration of SANParks concessions with the Greater Kruger's wider economy, extending economic activity well beyond core tourism services.

This activity translates into an estimated R655 million in gross value added, including approximately R611 million in labour compensation and R43.9 million in gross operating surplus. SANParks tourism concessions therefore make a substantial contribution to household incomes and local value creation in the Greater Kruger. In employment terms, the concessions support approximately 3,756 jobs² across the province, spanning skilled (373), semi-skilled (1,370), unskilled (645) and informal (1,368) workers. The breadth of this employment profile underscores the importance of SANParks concessions not only for professional and technical occupations, but also for labour-absorbing and livelihood-supporting activities.

The economic activity generated by SANParks tourism concessions also necessitates the importation of approximately R559.3 million worth of goods and services. This represents a negative impact³ on South Africa's balance of trade, reflecting the extent to which certain inputs into the tourism value chain are sourced from outside the domestic economy. However, the injection in production and income associated with SANParks tourism concessions generates a positive fiscal contribution. The total tax revenues associated with concession activities in the Greater Kruger are estimated at approximately R63.2 million.

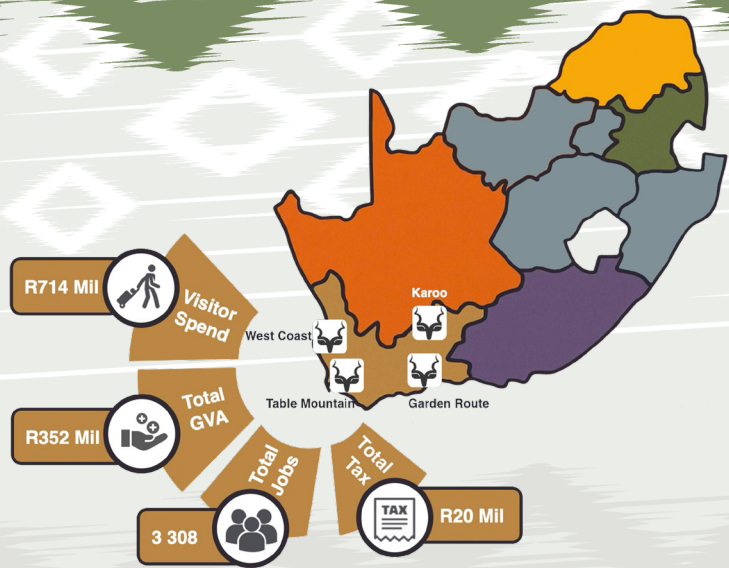
Western Cape Economy

The Western Cape's results reflect its status as a highly developed tourism and services hub within South Africa. The province benefits strongly from indirect and induced impacts, driven by its advanced hospitality sector, transport infrastructure, food and beverage industries, and business services. These linkages position the Western Cape as a major supplier to tourism activity occurring across the country, including SANParks destinations. Concession-linked activities support an estimated R918.8 million in total economic output in the province, of which R143.2 million arises directly and a substantial R765.7 million is generated indirectly through inter-industry transactions. The dominance of indirect effects reflects the Western Cape's diversified and sophisticated economic base, which supplies a wide range of goods and services into the tourism value chains.

This production response translates into approximately R352.5 million in gross value added, including R339.6 million in labour compensation and R12.9 million in gross operating surplus. SANParks tourism concessions support an estimated 3,308 full-time equivalent jobs in the province, distributed across skilled (375), semi-skilled (780), unskilled (1,285) and informal (868) workers. This employment profile points to

² Employment figures are expressed in full-time equivalent (FTE) jobs

³ While imports are an inevitable feature of an open economy, the scale of this leakage highlights an opportunity to further strengthen local and regional supply chains in order to increase domestic value retention.



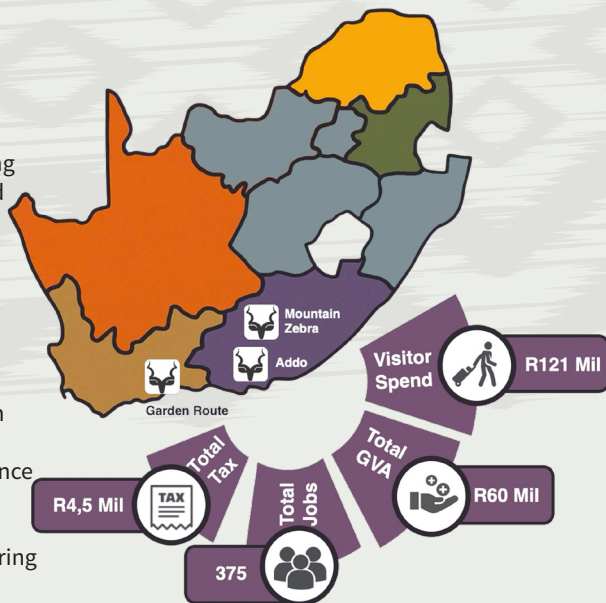
the Western Cape’s role in sustaining both higher-skill service functions and labour-intensive activities linked to food processing, logistics, trade and business services.

These economic activities required the importation of approximately R216.0 million worth of goods and services. This reflects the province’s participation in globalised supply chains and the import content of certain manufactured and service inputs used within tourism-supporting industries. These concessions also make a notable fiscal contribution within the Western Cape. Total tax revenues were estimated at approximately R20.1 million, comprising taxes on production (R12.4 million) and taxes on products (R7.7 million).

Eastern Cape Economy

In the Eastern Cape, tourism commercialisation generates a pattern of impacts that is strongly supply-chain driven. While direct tourism activity is smaller than in Mpumalanga, the province benefits significantly through indirect effects associated with interprovincial trade, logistics, agriculture, manufacturing

and business services. Concession-related activity supports an estimated R179.6 million in total economic output within the province, comprising R43.1 million in direct effects and a substantially larger R135.2 million in indirect effects. This structure indicates that the Eastern Cape benefits predominantly through upstream production and service responses, rather than through large concentrations of direct visitor-facing tourism operations.



This production activity generates approximately R60.0 million in gross value added, including an estimated R57.2 million in labour compensation and R2.8 million in gross operating surplus. SANParks tourism concessions support approximately 375 full-time equivalent jobs in the Eastern Cape, distributed across skilled (374), semi-skilled (94), unskilled (128) and informal (115) workers. The distribution of employment effects highlights the importance of conservation-linked tourism as a catalyst for job creation in the Eastern Cape.

The economic activity necessitates the importation of approximately R40.1 million worth of goods and services. This reflects the extent to which certain intermediate inputs into tourism and its supporting industries are sourced from outside the domestic economy and points to opportunities for strengthening provincial and national supplier networks. In addition, the total tax revenues were estimated at approximately R4.5 million, comprising taxes on production (R2.7 million) and taxes on product (R1.8 million).

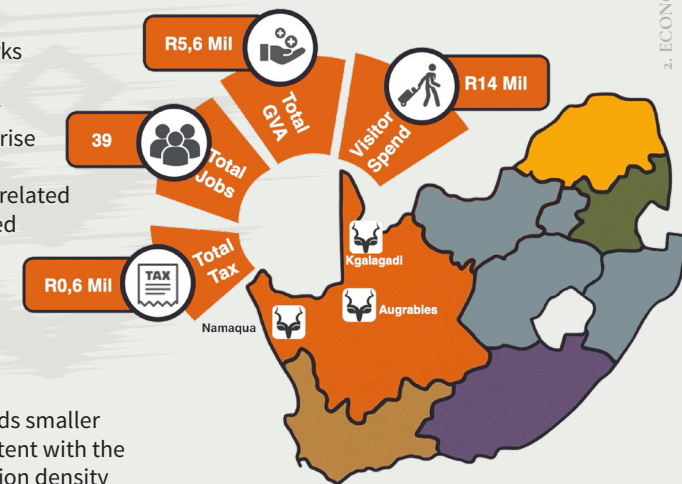
These results highlight opportunities for SANParks and partners to further strengthen local supplier development and enterprise integration, enabling a greater share of tourism-related expenditure to be retained within the Eastern Cape economy.

Northern Cape

The Northern Cape records smaller absolute impacts, consistent with the province’s lower population density and more limited industrial base but nonetheless exhibits clear positive responses through indirect and induced

channels. Concession-linked tourism activity supports approximately R21.6 million in total economic output, consisting of R6.1 million in direct effects and R15.4 million in indirect effects. This activity generates an estimated R5.6 million in gross value added, including R5.2 million in labour compensation and R0.4 million in gross operating surplus.

SANParks tourism concessions support approximately 38 full-time equivalent jobs in the province, comprising skilled (4), semi-skilled (13), unskilled (7) and informal (14) workers. It should be noted that in the Northern Cape work is very seasonal due to visitors mainly travelling during the flowering season; hence, the number of job opportunities will be higher over a short period compared to the full-time equivalent value portrayed. Although small in number, these employment effects are particularly meaningful in a province characterised by low population density and limited employment opportunities.



These economic activities in the Northern Cape necessitate the importation of approximately R4.7 million worth of goods and services, reflecting the province's limited industrial base and reliance on external suppliers for certain inputs into tourism and conservation operations. Furthermore, the total tax revenues were estimated at approximately R0.62 million, comprising taxes on production (R0.37 million) and taxes on products (R0.26 million). While modest, these fiscal effects underscore the broader socio-economic relevance of SANParks tourism concessions within smaller provincial economy.

The Northern Cape results point to the potential for SANParks tourism PPPs to act as development catalysts, particularly when combined with targeted local procurement, skills development and enterprise support initiatives.

2.5. Tourism Influx into the Economy

In sectors like mining or agriculture, the value chain is long and often has large economic leakages; for example, a diamond mined locally might be cut in India and sold in New York (the local economy only captures the extraction value, losing out on retail, logistics and processing margins). In tourism, the consumption happens on-site; for example, when a tourist buys a coffee or pays for a hotel room, that transaction happens within the local jurisdiction. Furthermore, once at the destination, the point of sale is more direct, injecting instant cash flow into the local ecosystem. Because tourists are physically present, their spending spills over into sectors that have nothing to do with tourism. This is

much broader than the specialised supply chains of mining or manufacturing.

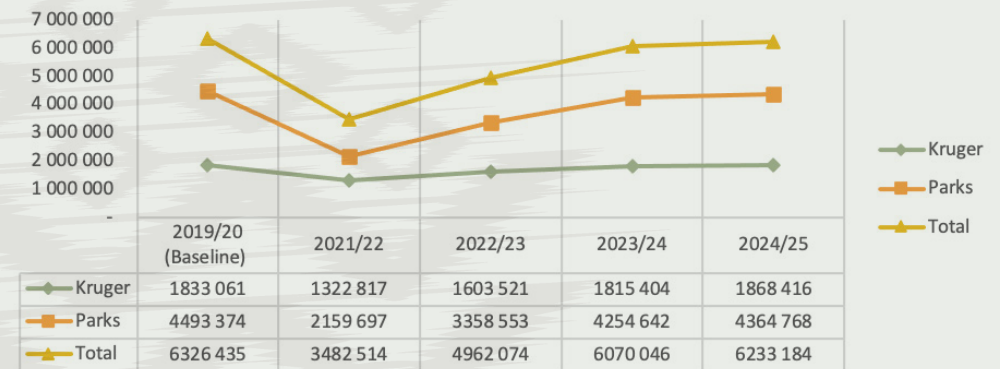
Moreover, the tourism sector, particularly ecotourism, is viewed as a low resource consumptive activity, as it relies on renewable assets since the selling of the experience can use the asset millions of times without it ever being depleted. Thus, it incentivises conservation rather than extraction, such as in the mining industry. The provision of infrastructure to access these destinations, in turn, improves the livelihoods of the local population along these tourism corridors. In addition to the gross value added by the tourism activities to the economy, taxes are also generated that contribute to the government's fiscal. The concessions make an effort to localise their operations as much as possible, with over three-quarters of operational expenses and procurement being sourced from the local area.

The induced and indirect employment seem to be more localised within the value-chain, particularly in Mpumalanga and the Western Cape. Furthermore, each job supports a household, with rural areas having large household sizes with six or more members compared to urban areas with two to three members. Furthermore, the skills levels of employment are associated with semi-skilled, unskilled and informal labour, which aims to alleviate the burden on poverty-stricken areas by targeting vulnerable groups such as previously disadvantaged people, women and youth. The direct employment at the concessions also has a fundamental impact on broad-based transformation and localised employment.

3. TOURISM MARKET AND VISITOR EXPERIENCE

3.1. National Parks Tourism Market

According to SANParks⁴, the tourism sector has demonstrated significant resilience during the 2024/2025 reporting period. Overall visitor numbers continue an upward trajectory, though they have not yet fully returned to the pre-COVID-19 baseline. Current figures remain slightly below the 2019/20 pre-pandemic peak of 6 326 435. Kruger National Park has successfully surpassed its pre-COVID baseline, reaching 1 868 416 visitors compared to 1 833 061 in 2019/20.



Source: SANParks

The private concessionaires reported that the COVID-19 pandemic had a dire impact on their financial sustainability between 2020 and 2022. Because many of these partners, such as luxury lodge

⁴ SANParks. 2025. Annual Report 2024/25.

operators and specialised activities, were heavily reliant on high-spending foreign markets, the global travel bans and the “red-listing” of South Africa during various waves of the pandemic effectively severed their primary revenue streams. This vulnerability was particularly evident at major sites like Table Mountain National Park and Kruger National Park, which are traditionally “bucket list” destinations for international travellers. During this period, international conservation fees, which typically account for over 80% of total conservation revenue, plummeted. The collapse of the foreign market forced many businesses to pivot toward the domestic market. An immediate loss of cash flow from bookings and a long-term threat to the 2 100 jobs they provided were reported. By the end of the 2021/22 financial year, although visitor numbers began to climb back to approximately 3.48 million, the recovery for concessionaires remained slower than that of the parks’ general operations, as international arrival numbers stayed well below 2019 levels for

much of that period. Despite the adverse effects of the pandemic, most of the concessionaires were able to recover and adapt their sustainability model to drive growth and prosperity for their business and associated communities.

The overall tourism market for the parks shows a strong reliance on domestic tourism. South African residents constitute the largest segment, accounting for 53% of total visitors with nearly 2.7 million entries. This suggests that the local market remains the primary driver of footfall across the national park system. International tourism also represents a substantial portion of the guest base, making up 44.9% of the total. In contrast, regional tourism from SADC (Southern African Development Community) nationals remains a very small fraction of the market, contributing only 2.1% of total visitors. This distribution emphasises a diverged market dominated by locals and long-haul international travellers.

The representation of international visitors is driven by the marketing efforts, luxury accommodation and visitor experiences offered by the concessionaires, particularly in parks such as the Kruger, Addo, Table Mountain, Garden Route and Kgalagadi. Furthermore, concessionaires also provide convenience and auxiliary services in many of the parks relating to retail, restaurants, air transport, car rentals, etc. that enhance the visitor experience for all visitors to the parks.

3.2. Concession Tourism Market

Overnight Accommodation

The accommodation data for SANParks⁵ reflects a steady post-pandemic recovery, with overall bed occupancy rising to 50.8% in the 2024/25 period from a low of 23.7% in 2020/21. This growth is largely driven by Kruger National Park, which reached 57.4% occupancy by the end of

Q4 2024/25, consistently trending upward from its 48.4% mark in 2021/22 but still trailing its pre-pandemic high of 60.6%. Conversely, other regional parks have remained remarkably stagnant, with occupancy hovering near 39.6%, slightly below both the previous year's 40.4% and the pre-COVID level of 42.3%, indicating that while the flagship park is regaining momentum, regional destinations are experiencing a flatter recovery.

The average reported occupancy rate by concessionaires for 2024/25 was 59%, slightly above the SANParks accommodation occupancy levels, which were above the national accommodation industry occupancy rate of 40.7%⁶. The lodge concessionaires reported 69 949 overnight guests with a total of 158 111 bed nights for 2024/25, which indicates 3 nights as the average length of stay per guest. A lodge concession was able to host on average 5 829 guests, yielding an average spend of R9 799 per guest. Although some lodges do cater for the self-drive domestic visitor, the majority serve the international market, with 65% of guests perceived to be foreigners.



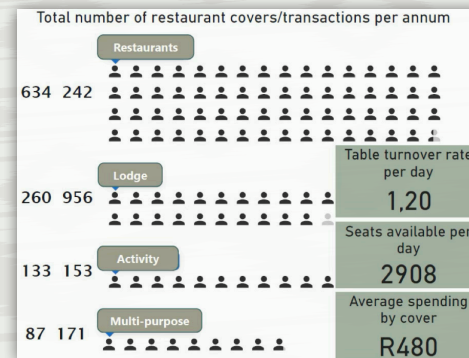
Restaurants and Retail

The implementation of privately operated restaurant and retail services through PPPs serves as a critical pillar for SANParks' financial sustainability and the enhancement of the overall visitor experience. By outsourcing these non-core functions to specialised private

partners, SANParks has successfully transferred operational and financial risks to experienced operators. Beyond fiscal benefits, these partnerships add significant value by introducing professional service standards, diverse culinary options, and high-quality retail products that SANParks would otherwise struggle to maintain internally.

Restaurants

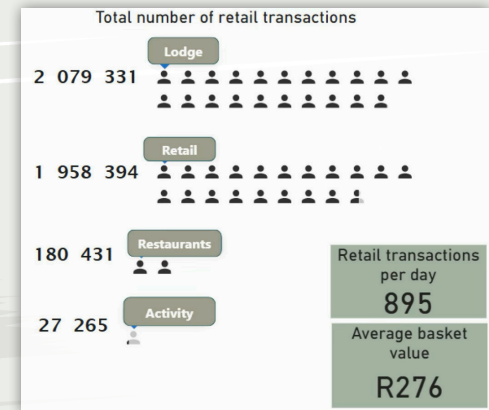
Other than the typical restaurant concessions, there are restaurants on the premises at some of the lodges, activities and multi-purpose concessions. Overall, 1.1 million restaurant covers/transactions were undertaken by concessions throughout the 2024/25 financial year, averaging 69 720 covers/transactions per site over a year period. Visitors spend an average of R480 per restaurant cover. The table turnover rate (number of covers ÷ number of seats) per day is estimated at 1.20 per seat, with a total of 2908 seats available per day.



Retail

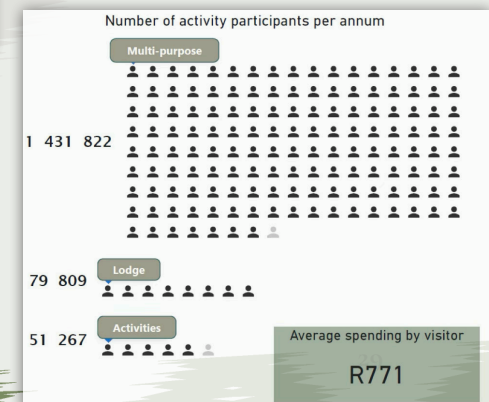
The retail transactions are associated with visitors' (day or overnight) purchases of souvenirs, clothes, consumable products, beverages, etc. at the Park Shops, lodges, kiosks and activity centres. Over 4.3 million transactions were recorded during the 2024/25 financial year, with an average

of 895 transactions per day at a site. The average basket value of a visitor purchase was estimated at R276.



Activities

During the reporting period⁷, guest participation in SANParks operated activities showed a robust recovery and significant growth, with 313,787 guests taking part in various excursions. This figure represents a notable 17.3% increase from the previous financial year and a dramatic surge from the pandemic-induced low of 130,852 in 2021/22. Most significantly, current participation levels have now surpassed the pre-pandemic benchmark of 291,562 recorded in 2019/20, signalling a renewed appetite for immersive wildlife experiences. This resurgence is particularly vital for private concessionaires.



⁷ SANParks. 2025. Annual Report 2024/25.

In comparison, concessions estimated the total visitors participating in activities at 1.56 million visitors, with an average of 142 082 participants per annum at a site. There is a major differentiation in product offering between multi-purpose sites, which offer visitors various experiences and are equipped to deal with large volumes of foot traffic, versus small activities that require visitor supervision. Concessions reported that representation of international visitors participating in activities averaged 57%. The average spending per visitor on an activity was R771. Their sustainability is inextricably linked to these participation volumes, as the majority of their revenue is generated through the specialised guided tours and adventure activities that drive the high-value visitor experience.

3.3. Market Access and Strong Brand Development

National parks serve as powerful ecotourism catalysts, yet concessionaires face significant operational hurdles despite benefitting from the parks' brand prestige. Key challenges include a lack of integrated marketing, as SANParks' promotional efforts often fail to prominently feature private partners, alongside the financial strain of increases in visitor gate fees, which concessionaires frequently must absorb to remain competitive. Furthermore, shifting market dynamics characterised by a decline in diverse international travel, shorter booking windows and more frugal domestic spending have complicated revenue forecasting and operational planning in an unstable global economic climate.

Despite the challenges, the PPP

model has facilitated robust business outcomes when well-managed. The provision of strong brand development by concessionaires elevated the park-based accommodation and visitor experience offerings on the world stage. This demonstrates the resilience and brand power that can be built within the concession framework. Operators demonstrated an impressively high international ratio by strategically investing in major overseas markets, securing a diverse and reliable stream of foreign visitors.

The feedback from concessionaires underscores a critical structural challenge in Public-Private Partnerships (PPPs), with a significant 3-5 year lead time required to develop and mature a product market. For long-term lodge concessions, which average 20-year contract periods, this development phase represents a manageable portion of the investment lifecycle. However, for small adventure operators on 5-to-10-year contracts, the "market-building" phase can consume up to half or even the entirety of their tenure. This creates an inherent imbalance in return on investment (ROI) potential, where smaller operators face the risk of their contracts expiring just as their marketing efforts begin to yield peak results. Furthermore, the sensitivity of these lead times to major force events and shifting market perceptions cannot be overstated; a single disruptive event can reset years of brand-building progress. To ensure long-term sustainability and equitable growth, PPP frameworks must incorporate mechanisms that account for this maturation lag, such as performance-based extensions or contingency clauses that protect operators from the compounding effects of external market shocks.

The PPPs within SANParks serve as a powerful engine for conservation-led

Kruger...a Business Events Destination



Source: Skukuza Safari Lodge

Since April 2024, Skukuza Safari Lodge and Nombolo Mdhlu Conference Centre have hosted 69 conferences, most notably the G20. Thus, validating the lodge as a world-class venue capable of high-security global diplomacy. The event had a desired economic impact, requiring additional outsourcing and staffing, and created opportunities for small businesses to showcase their work.

This success has led other international organisations, such as UNICEF, to consider the venue for future gatherings. While occupancy currently sits at 22% for its first year, the G20 and other events serve as a powerful endorsement. This prestige is expected to accelerate future growth, cementing the lodge's reputation as a premier destination for high-impact business tourism.

growth, leveraging the unique nature-based destinations managed by SANParks with the marketing agility of private enterprise. These collaborations transform concessionaires into long-term brand ambassadors who invest in destination marketing and global trade relations that elevate the SANParks brand. While the standard 5-year market maturation period requires patience, it creates a foundation for sustained success, allowing operators to build premium brand equity that benefits the entire national park system. Thus, SANParks fosters a resilient tourism ecosystem where shared investment leads to world-class service standards, a robust market presence, and a thriving, sustainable destination identity.

Gateway to Kruger



Source: Airlink

Serving as a key gateway to Kruger National Park, Skukuza Airport significantly enhances accessibility for travellers by providing air access, rental car services and transport connections to lodges in the Greater Kruger. During the 2024/25 financial year, the hub recorded 44,731 passengers, a substantial increase of 8,839 over the previous year. This impressive growth underscores the airport's critical role in maximising visitor convenience while actively driving the park's economic sustainability. Furthermore, the airport operator, Airlink, and its partners also prioritise social investment in Sabi Sand Pfunanani Trust and Conservation SA.

Bush Braai... an opportunity for SMMEs



Source: Inkosi DMC

The Bush Braais initiative was launched to empower small businesses to provide value-added experiences within the Kruger National Park. Currently operating at Phalaborwa, Phabeni and Crocodile Bridge, these ventures face significant operational challenges, including strict guest limitations, the requirement for armed field guides and adherence to zero-waste protocols. Despite these barriers, the programme has fostered tangible success. Inkosi DMC evolved from a South African Tourism market access support programme into a full Destination Management Company, deeply embedding local culture by establishing a centre in Shabalala. Similarly, Royal Ibhumbesi captured a strong domestic market and expanded into Greater Kruger accommodation, while Nandzana Safaris partnered with Suzzy's Kitchen to ensure authentic local cuisine. Although the concession has met its developmental goals, authorised operators now face intense competition from private external venues. To sustain their market share, these businesses require targeted support through integrated marketing and strategic incentives to secure priority status.

Branding Cape Town



Source: Wild Horizons

Commencing operations at Table Mountain in 2022, the new concessionaire navigated significant hurdles, including pandemic disruptions and complex engineering requirements to redrill safety anchors. Establishing market awareness for the product took three years of sustained effort. Cape Town Abseiling, similar to other smaller activity concessions, prioritises sustainable employment, providing staff with full benefits and mountaineering training rather than typical seasonal roles. To ensure operations meet European and American standards, the site undergoes annual hydraulic anchor testing, quarterly PPE inspections, and external audits by Vertical Safety Systems. These rigorous measures highlight the immense capital and time required to establish adventure activities often viewed as peripheral leisure experiences.

Access to nowhere



Source: Chiefs Tented Camps Namaqua Flower Beach Camp

South Africa Experiences, in partnership with Motsamayi Tourism Group, operates a unique venture exclusively for one month during the peak flower season in the Namaqua National Park. Situated 150 km from the nearest community, the Chiefs Tented Camps operation faces significant logistical challenges. However, 15 years of marketing exposure has benefitted the wider park, driving up visitor numbers and filling campsites despite the area's limited infrastructure. The concession has proven highly viable, with occupancy surging from an initial 12% to 92% this year. This success validates that a small-scale, exclusive model with a slow-growth approach can thrive, even in an extremely remote environment.

4. EMPOWERMENT AND EMPLOYMENT

In the bid to drive transformation, SANParks has set out terms and conditions relating to their BEE obligations within the PPP agreements. Although older contracts are less prescriptive in their BEE requirements, the more recent and future PPP will place emphasis on more meaningful ownership structures in terms of Black people representation, ensuring that the associated land claimant/community groups are shareholders and promoting more local representation. In response to this move to more inclusive ownership and management structures, a few concessions have transitioned their structures to align with the Tourism BEE Sector Code targets.

4.1. Black Ownership and Management Representation

Black ownership representation is low with EMEs, only at 25%; however, they are exempt from the Tourism BEE Scorecard. What should also be considered is that some businesses that started as EMEs at the beginning of their contract are now classified as QSEs due to their business growth. It is still in SANParks' best interest to promote these EMEs, particularly in areas with low yield and limited accessibility. Thus, ensuring that the business opportunity primarily benefits the smaller local economies.

Many of the QSEs are associated with the SPV model or more boutique experiences and seem to promote localised Black ownership. A few of these businesses also have Black Employee Ownership Schemes, ensuring that they promote local ownership within the company. The LEs achieved the 51% Black ownership representation. Furthermore, QSEs and LEs are above the Tourism BEE Sector Code target of 30% Black people representation in ownership. However, LEs have lower local board and executive representation than QSEs, though they still exceed the 20% PPP BEE target, largely due to their ownership by national operating and holding companies.

The following graphs indicate the reported average percentage representation of Black people, Black women and local people within the ownership structure of the entities.

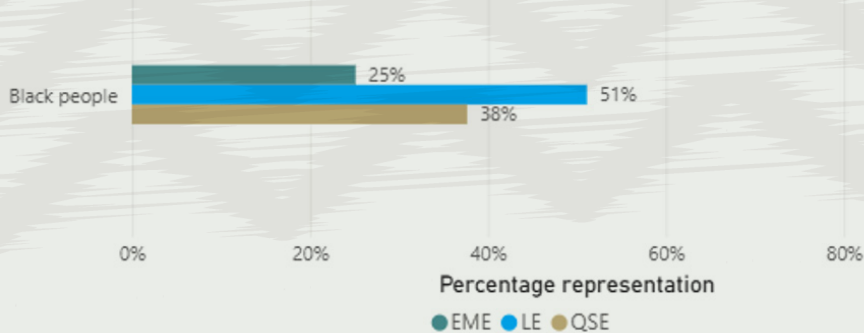


Figure 5: Black people representation in direct shareholding

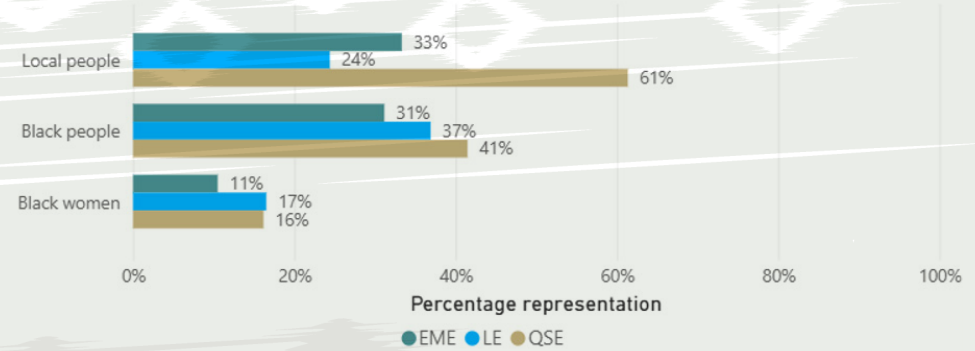


Figure 6: Representation at board level

The EMEs and QSEs have a large representation of local people within their management structure compared to LEs. As can be seen in the figure below, more than two-thirds of QSEs' and LEs' on-site management are Black people, who are from the local area. Black women in management constitute about a quarter of the positions available. This is within reach of the BEE obligation targets.

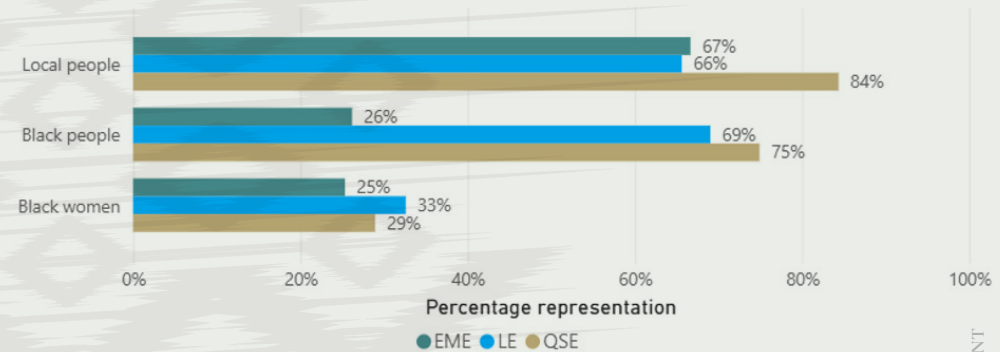


Figure 7: Representation at management (on site)

4.2. Employment Distribution

The respondents reported 2 393 permanent jobs, with 420 temporary/seasonal jobs sustained by the concessions. The lodges are the largest contributor to employment, with some employing four (4) staff to serve one overnight guest at a time. Other concessions with many temporary jobs associate this type of employment with varying seasonal demand in areas.

On average, the multi-purpose sites employ 131 people, followed by lodges with an average of 92 permanent employees and retail with 48 employees per site. Even the smaller concessions permanently employ more than 20 people.

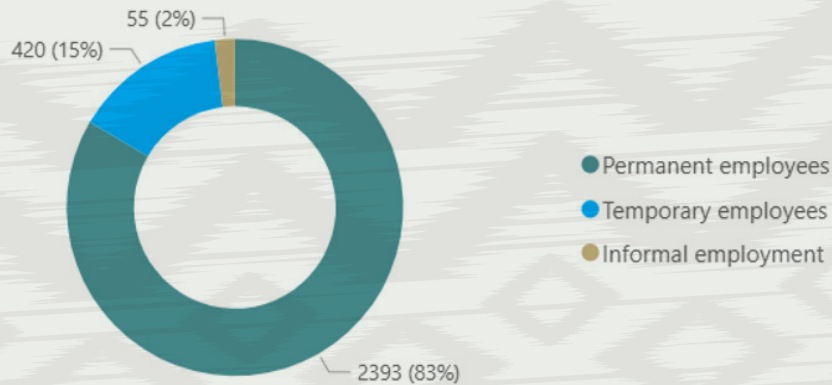


Figure 8: Direct employment

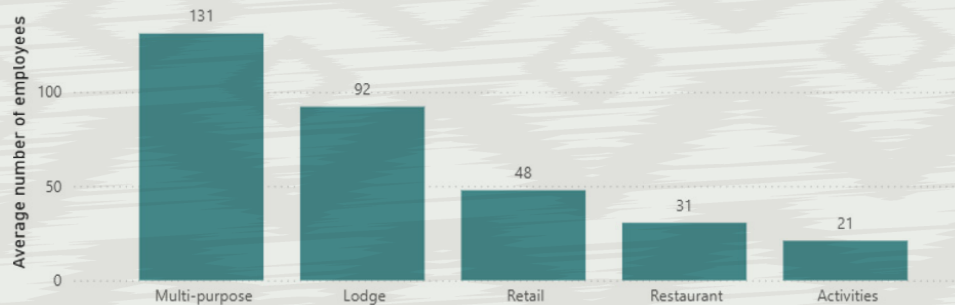


Figure 9: Average number of permanent employees by concession type

In total, the lodges are the largest contributor to employment, followed by the restaurants and multi-purpose sites.

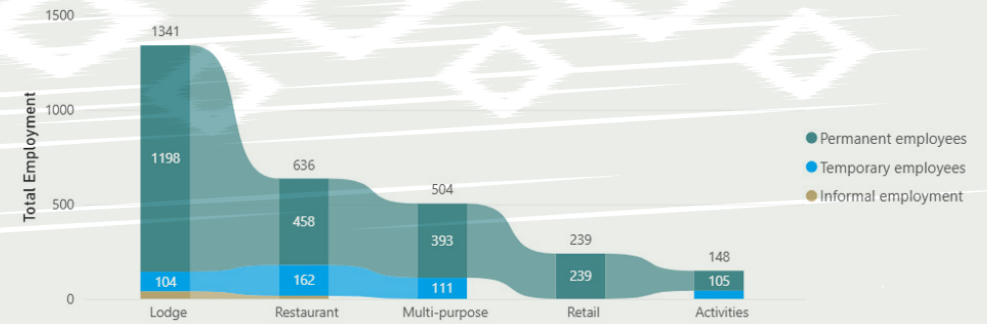


Figure 10: Direct employment by concession type

SANParks, in partnership with their concessions, aim to push the equity agenda by ensuring that employment opportunities are targeted at local disadvantaged communities surrounding the national parks. Concessions reportedly employ 95% Black people, who are South African citizens, half of whom are Black women (54%). This is above the intended BEE obligation targets of 75% Black people and 40% Black women representation. On average, 85% of employees are within a 50 km radius of the establishment or a 30 km buffer of the protected area, which is above the 60% BEE obligation target. Moreover, youth represent over 49% of employees.

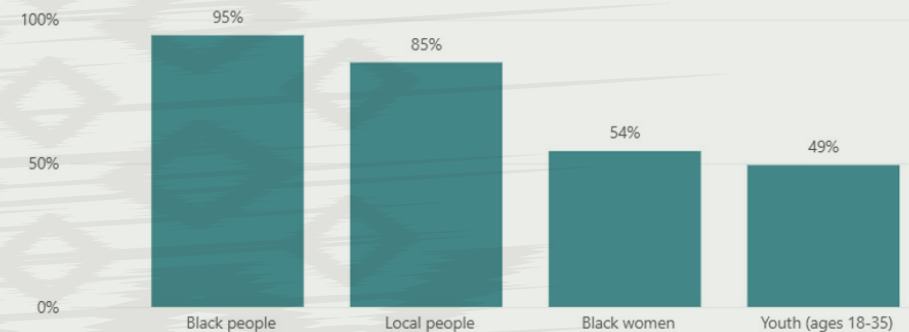


Figure 11: Employment demographic

4.3. Recruitment

When recruiting for tourism concessions, several key factors must be considered to ensure a successful operation. First and foremost, the understanding of the local tourism market is crucial. This includes familiarity with seasonal trends, peak visitor times and the preferences of various tourist demographics. Additionally, candidates should possess relevant experience in customer service and hospitality, as these are

vital in enhancing the visitor experience. Knowledge of local attractions, history and culture is essential, enabling staff to engage effectively with guests and provide valuable insights. Furthermore, candidates must demonstrate strong communication skills. It is also important to evaluate applicants' adaptability and problem-solving abilities, as the dynamic nature of tourism often requires quick thinking and flexibility in response to unforeseen challenges. Lastly, adherence to ethical standards and sustainability practices should be assessed, ensuring that staff align with the values of responsible tourism, which is increasingly important in today's travel landscape. By taking these considerations into account, concessions aim to build a skilled and responsive workforce that enhances the overall visitor experience.

From a skills perspective, EMEs maintain a larger skilled base by retaining their skilled workers and ensuring that they upskill most staff to perform optimally in most required job activities, promoting multi-skilled personnel. Whereas QSEs and LEs have a large base to work from, providing more opportunities to employ unskilled and semi-skilled labour. In most cases, people at these establishments were employed with little or no experience and were trained/upskilled.

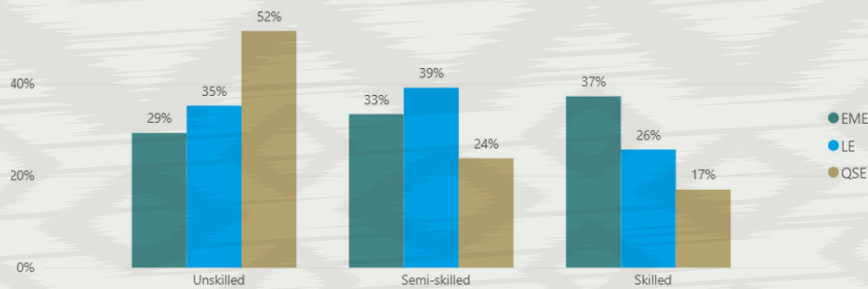


Figure 12: Employee skills level

The recruitment of local people requires a basic positive attitude, a great smile and willingness to learn. Most of the industry-specific skills required can be taught, where individuals only require good people skills, the ability to learn and consistency in their work ethic.

Concessionaires reported 471 new recruits for the 2024/25 financial period; however, some of these new appointments are on recurring contracts due to extensions of PPP agreements. On average, about 21% of new recruits have no experience. Some concessions are required to recruit from the designated land claimant groups, which ensures that the displaced landowners benefit from their claim through job creation. In addition to these appointments, it is critical for concessions to employ from a broader worker pool to provide opportunities to individuals that have the talent and appetite for the industry. Thus, ensuring that local employment is beneficial to all interest groups.

4.4. Skills Development

Training

Over 83% of concessions see the value in training programmes for their employees. Lodges, activities, retail and multi-purpose concessions mostly provide skills development opportunities, as the type of jobs available do require specific skills and basic foundational knowledge to offer the relevant services to visitors. The restaurants seemingly have less formal skills development available and rely more on “in-service training”.

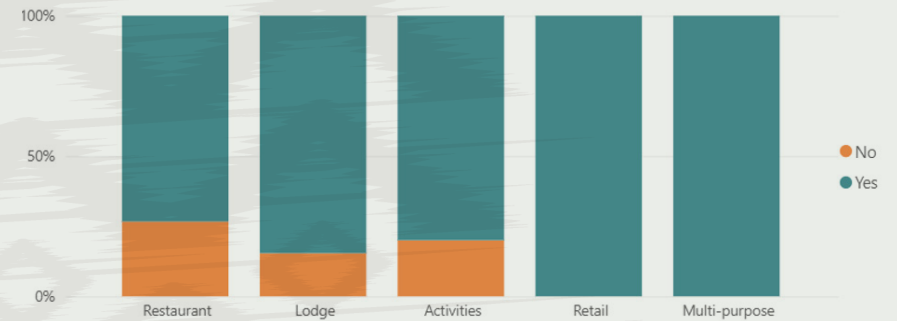


Figure 13: Skills development programme

The skills development programmes varied between online training courses, bursaries, planned training programmes, certified training courses and standard operational training. In terms of physical job-related skills, the type of training is related to tour or adventure guiding, first aid, firefighting, food and beverage standards, health and safety, shift operational activities and dangerous animal interaction. To promote personal and professional growth, training also focused on softer skills such as leadership, customer service, product knowledge and management skills.



Informal or Experiential Learning

Other than the training provided in a more formal setting, most concessions (86%) provide informal or experiential learning through “in-service training”. Some concessions use knowledge exchange sessions between different businesses or regions to give employees an opportunity to learn new techniques from peers. General induction and knowledge about the product and destination are critical to internally promote ambassadorship for the tourism destination. A few of the concessions offer internships for students from associated hospitality, culinary or guiding colleges

Does your concession offer informal or experiential learning for your staff or communities?

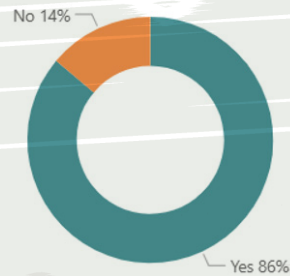


Figure 14: Informal or experiential learning



4.5. Staffing Management and Succession

In some cases, staff relations were strained by substandard housing and social friction between concessions and SANParks employees over pay and benefit disparities. Local hiring remains a sustainability priority supported by in-service training. Furthermore, some operators struggle with post-COVID labour shortages and performance issues. To ensure operational resilience, concessionaires had to balance complex community dynamics while maintaining a geographically diverse workforce to mitigate local disruptions. Despite some operational hurdles, several operators have achieved notable success in staff management and social impact, highlighting best practices for the PPP model. A crucial success is job retention; for example, a lodge retained all 180 employees during the challenging COVID-19 period. One way in which this was achieved was through a recovery levy, the provision of food parcels, and eventually reimbursing all staff for lost earnings, which significantly reinforced employee loyalty. Another success is reported in low turnover, where an activity operator attributes its very low staff turnover to correct compensation practices and a “family-like” treatment of employees,

including paying for some children’s school fees. Strong human capital development is also evident through robust succession planning. Smaller enterprises ensure all staff are cross-trained and skilled to a uniformly high level, making any employee capable of stepping into a manager’s position when necessary. Furthermore, concessionaires drive social upliftment through targeted training programmes. For example, concessions provide bursaries for employees to train as field guides and for hospitality qualifications, developing essential skills. Complementary to this are youth empowerment programmes, targeting young entrepreneurs or school graduates to develop their skills in the tourism sector or business environment.

Kalk Bay Fishing Community & Harbour Trust



Source: Boulders Penguin Sanctuary

As part of a community-private-public partnership (CPPP) at the Boulders Penguin Sanctuary, the Kalk Bay Fishing Community Residence and Harbour Trust receives over R4 million in dividends from Tourvest. This funding supports 36 jobs and reaches 419 direct beneficiaries. The capital is allocated toward productive assets and initiatives, including the purchase of a fishing boat, a bakkie and a trailer for the primary fishing co-op. Additionally, it covers rental payments for the Only Fishers Secondary Co-op warehouse facilities, funds the upgrading of historical fishing residences in Kalk Bay, and sponsors co-op members to attend premier industry events like the 10th International Fishery and Seafood Expo in Guangzhou, China. The partnership also extends its support to supplementary initiatives, such as the Fisher Child Heritage Project.

2025 Tsitsikamma Tourism Awards Winner



Congratulations!
STORMSRIVER ADVENTURES

Source: Fair Trade Tourism

Stormsriver Adventures is a pioneer in responsible tourism, as one of the earliest companies to achieve Fair Trade Tourism certification. Best known for introducing Africa’s first Tsitsikamma Canopy Tour, it distinguishes itself with 48% staff ownership and targeted skills training programmes. Through environmental stewardship and job creation, Stormsriver Adventures has built an inclusive model that preserves local heritage while empowering the community. This commitment to excellence recently earned them the Adventure Tourism Experience of the Year title at the 2025 Tsitsikamma Tourism Awards.

**A fund making an impact,
inspired by the pandemic**



Source: SANParks

Originally launched during the Covid pandemic as a guest levy to support tourism recovery, one of the Concessions introduced a fund which has evolved into a comprehensive empowerment ecosystem. Beyond community projects, it provides employee profit-sharing and vital healthcare access for their families in remote areas as well as training its employees and local community members on resource sustainability and conservation initiatives. The fund sponsors local talent for FGASA-accredited programmes at an Accredited Field Guide College. Furthermore, employees, local community members and local business can, through a fair and equitable application process, secure bursaries for hospitality qualifications at entities such as the SA College of Tourism or advanced chef training at the prestigious Silwood School of Cookery and other educational and training opportunities. The fund also supports developing local community entrepreneurs in identifying and growing their businesses into potential suppliers for the broader hospitality industry in the Greater Kruger National Park area. This investment in their people and the local communities is critical to delivering the authentic luxury experience at this concession.

**The adventure industry can
provide sustainable jobs**

**Singita Community
Culinary School**



Source: Singita

Based at Singita Lebombo Lodge's demo studio, the Singita Community Culinary School combines theory with practical rotations across five lodge kitchens. Since 2007, the programme has produced 114 graduates with a 92% employment rate, retaining 25% of this talent within Singita. Beyond culinary arts, the group focuses on staff development programmes such as wine steward training, leadership programmes and an online learning platform. Singita is committed to investing in its team to ensure employee advancement aligns with the high standards delivered to guests.



Source: SA Forest Adventures Knysna Zipline

SA Forest Adventures recruits from EPWP programmes like Working on Fire, transitioning temporary workers into a permanent, skilled workforce. By providing fair pay, housing and educational subsidies, they ensure low turnover and effective succession planning. Their commitment extends beyond the company, uplifting over a thousand local youth through complimentary adventure and mentorship programmes. To allow other SMMEs to achieve similar successes, red tape must be reduced at key tourism hubs, creating an environment where community-based tourism can truly thrive.

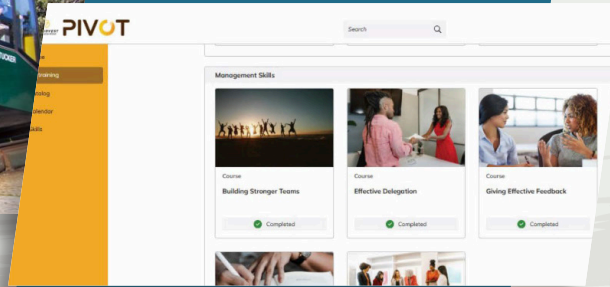
Upskilling at Cape Point



Source: SANParks

Cape Point relies on a specialised funicular system for visitor access. Facing a scarcity of technicians and an ageing workforce, the operator prioritises internal succession planning through structured training and mentorship. By equipping staff with transferable technical skills and safety certifications, the upskilling approach transforms entry-level roles into sustainable careers and professional growth paths. This upskilling not only secures the funicular's future but also elevates the broader technical competency of the local workforce.

Skills development is PIVOTAL in the hospitality industry



Source: Tourvest

Through the PPP between Tourvest and SANParks, a structured and scalable Learning Management System (LMS) named PIVOT was introduced. The primary objective is to drive skills development and community impact through digital learning in regions surrounding the national parks. Recognising the connectivity challenges inherent to remote conservation areas, Tourvest Destination Retail equipped each retail outlet with a dedicated training laptop, ensuring all staff members have reliable access to the platform. PIVOT enables centralised training, tracking and reporting. Additionally, the system offers tailored, job-specific learning pathways that range from entry-level core skills and onboarding to advanced leadership courses. To further enhance accessibility, offline learning is supported via the LMS app, while gamification features (such as points, badges and rewards) have successfully driven participation and increased success rates.

Let's keep it local



Source: Shishangeni Lodge

Shishangeni Lodge confirmed that 100% of its workforce originated from neighbouring communities. The lodge prioritised internal development, successfully training 80% of staff who arrived with no prior experience. A key success story included an employee rising from being a dishwasher to becoming the reservations manager. Beyond internal safety training, the lodge supported local youth through external jewellery-making workshops. Furthermore, their procurement focused on the Komatiipoort area, where two-thirds of suppliers were Black-owned or small businesses. On an ad hoc basis, the lodge facilitated enterprise development by helping a local wood supplier formalise their business operations and cash flow management.

A rising star... is always in our midst.



Source: Rhino Post Safari Lodge

Like many staff within SANParks concessions, the Head Field Guide at Rhino Post Safari Lodge, Sorta Mulhova, arrived with limited experience but immense potential. Her path was inspired by her father, a dedicated SANParks field guide until age 65 and assistant trails guide for a decade thereafter. Starting her journey as a cleaner, Sorta's natural leadership and passion for the wilderness soon became evident. Recognising her drive, the lodge sponsored her professional training, enabling her rise to Head Guide. Today, she oversees all field operations, blending her Shangaan heritage with a nurturing demeanour to welcome guests' 'home' to authentically experience the wonders of the African wilderness.

5. OPERATIONS AND ENTERPRISE DEVELOPMENT

5.1. Operations and Procurement

Operations

Operating these concessions is costly, since most of the sites are remote and require additional goods and services to offer the visitor experience. This relates to the infrastructure on site, such as the maintenance of buildings and off-the-grid systems (power, water, sewage and waste management). The provision of staff accommodation or transport within the national parks also needs to be considered. Increasing procurement costs of service providers, sourcing goods to these locations, and managing the logistics of visitor travel to, from and within these sites. A large amount is allocated to concession fees and other fees or taxes. Furthermore, the reported expenditure distribution and operational expenses do not consider all other expenses relating to the cost of sales, loan repayments, and other overheads that are not directly associated with operations but do have an impact on cash flows.

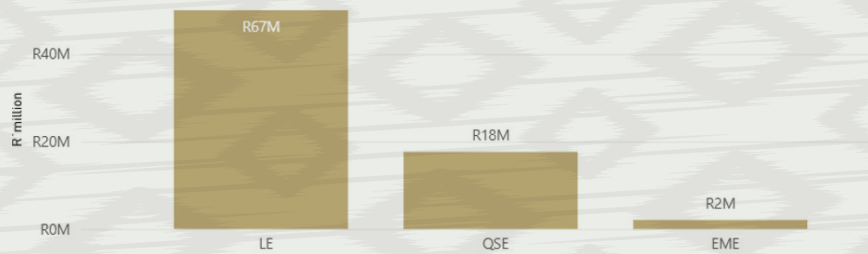


Figure 15: Average operation expenditure

On average, 78% of operational expenditure is spent in the local province.

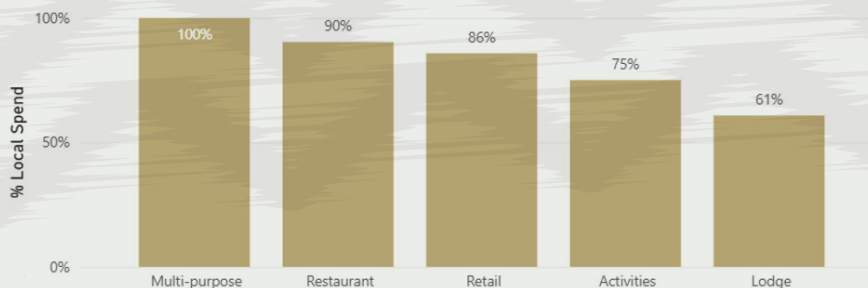


Figure 16: Percentage of operational expenditure in local province

Maintenance Burden

The cost of maintenance was a major issue, with concessionaires stating that the responsibility of maintenance to properties and associated infrastructure leading to the properties was confusing in certain PPP agreements, as most of the maintenance activities fall under SANParks' responsibility. However, SANParks lacks the capacity or responsiveness in this regard. It was noted that the newer PPP contracts might address this issue, but careful management of this relationship between the concessionaire, park management and the business development unit is required. The maintenance burden of existing and new infrastructure is particularly heavy on activities.

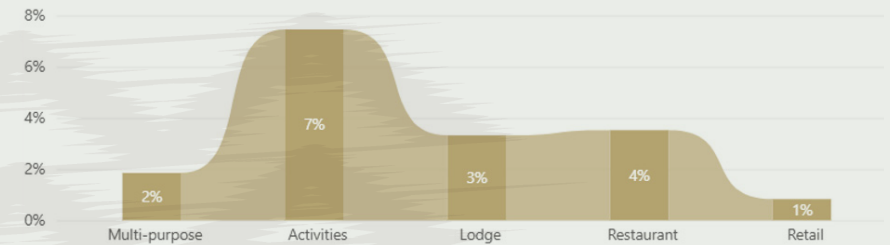


Figure 17: Average maintenance cost ratio

New Investment

Concessionaires have invested hundreds of millions in building, maintaining and improving infrastructure on their sites for the past 20 years. Just in 2024/25 alone over R91.9 million in new investment was foregone to enhance facilities, with 69% of this spending impacting the local province. There are also numerous future expansion or renovation plans that will be set in motion once new PPP contracts come into play. However, it should be considered that the COVID pandemic had an adverse effect on the return on investment for most of the concessionaires, which negatively impacts the value that concessionaires should have derived from their PPP contractual period.

Preferential Procurement

The companies operating the concessions strive to promote preferential procurement but face challenges in sourcing local suppliers with the relevant credentials, quality and capacity to serve their consumers' needs. Overall, almost 96% of procurement spend is within South Africa, with 60% of this spending allocated to BEE compliant companies. However, locally, 48% of procurement spending is allocated to BEE compliant companies.

LEs struggle to procure locally due to their large distribution value chains; however, efforts are made to promote enterprise and supplier development in this regard. QSEs and EMEs are more nestled in the fabric of their local economy; hence, a larger amount of spending is allocated locally.

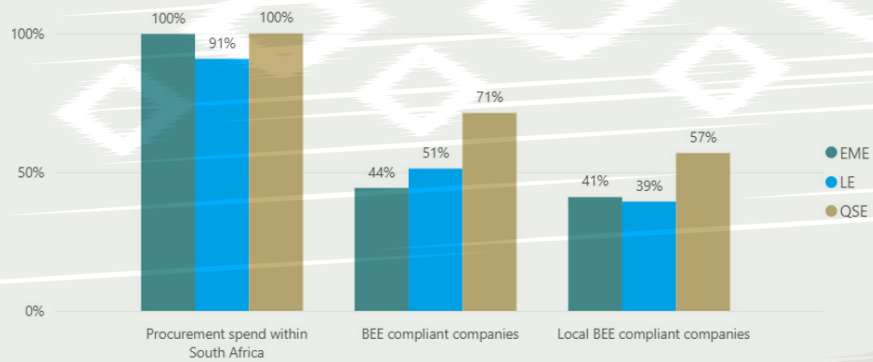


Figure 18: Preferential procurement by enterprise size

Most of the establishments can locally procure their food and beverages, maintenance services, laundry services, landscaping, waste disposal, etc. However, activities require specialised equipment that are internationally certified; hence, the lower spending locally and with BEE compliant companies. Furthermore, sourcing eco-friendly and quality products has proven to be difficult in the more remote or less urbanised areas. These shortcomings have sparked investment from concessions into local enterprise and supplier development initiatives.

5.2. Enterprise Development

Due to the major gap in the supply of quality and authentic local goods and services, concessionaires saw the need to invest in their local communities through enterprise development initiatives and corporate social investment (CSI). Not only in the interest of their BEE obligations but also to support and invest in their communities. This is particularly evident with the QSEs and LEs, where EMEs are too small to contribute extensively to such initiatives; they endeavour to support other small businesses or individuals on an ad hoc basis.

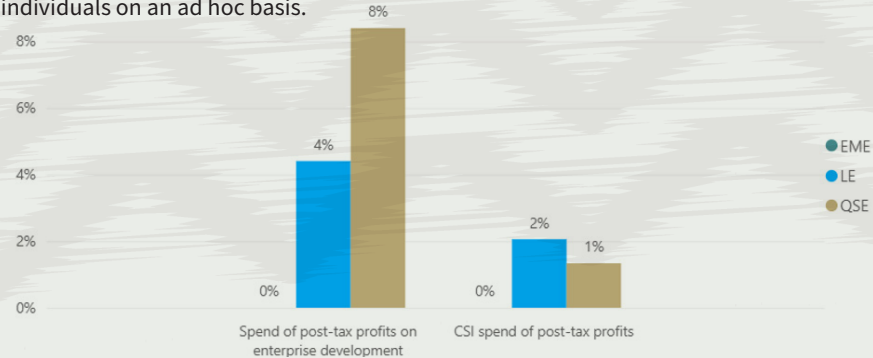


Figure 19: Enterprise development and corporate social investment

Typical enterprise development relates to the following services and goods:

- Maintenance services
- Laundry services
- Transport services for staff and guests
- Tour guides and field guides
- Spa and wellness services
- Firewood
- Sustainable agriculture
- Jewellery making and local quality crafts
- Honey and other eco-friendly products
- Soap and hygiene products
- Procurement logistics
- Car wash
- Ekasi experiences
- Local thatch

The intention with some of the enterprise development initiatives is to promote them as preferred suppliers or further develop them in supplier development programmes. In addition to the intended enterprise development initiatives, many concessions, through their CSI, support small local businesses or individuals with donations (such as vehicles, equipment, etc.) to assist with their ventures.

5.3. Visitor Experience and Operations

The partnership has yielded high standards of operational excellence and positive enterprise development initiatives. Operators generally maintain high operational standards, delivering premium experiences like five-star guest service and exceptional food and wine, which may have motivated the managing authority to upgrade its own accommodation offerings. Specific examples of success include an adventure operator, which is highly rated and ranked as a top activity provider in a major tourist region, showcasing operational excellence. In terms of community and business development, a hospitality provider successfully partnered with an organisation on a long-term philanthropic initiative to identify and mentor local entrepreneurs, grooming them to become reliable suppliers for the luxury accommodation industry. Additionally, one operator has achieved streamlined compliance by utilising an external compliance agency to effectively manage CSI, procurement and enterprise development requirements, ensuring proper fund distribution and compliance with regulations.

The concession framework faces growth hurdles due to negative visitor perceptions of high pricing and subpar park infrastructure, including deteriorating facilities and poor gate hospitality. While these costs fund vital conservation and community efforts, visitors are often unaware of this value. Operationally, concessionaires struggle with restrictive 80% local procurement targets and slow administrative processes that delay essential maintenance and stifle SMME growth. To align with the Social Economic Transformation (SET) agenda, recommendations focus on educating stakeholders about the value of public-private partnerships and prioritising visible infrastructure upgrades. Crucially, SANParks must reduce red tape and streamline approvals to better integrate local businesses into the park's value chain. Regardless of these challenges, many of the QSEs and LEs have put in efforts to localise their procurement and promote enterprise development with local small businesses or entrepreneurs.

BeKindSA



Source: Untouched Adventures

Dedicated to uncovering the Garden Route's hidden gems, the BeKindSA programme, driven by Untouched Adventures, fosters local potential through initiatives like the VGY entrepreneurial gap year in Jeffreys Bay. By combining mentorship with unencumbered capital investment, the fund empowers diverse enterprises, such as Kasi Corner Shisanyama in Storms River and the Tsitsi Car Wash within Tsitsikamma National Park. Additionally, the programme supported the establishment of a vital National Sea Rescue station in the area. Through cooperative support and focused youth development, BeKindSA builds a favourable environment for SMMEs, effectively changing lives and strengthening the region's economic future.

Queens of Crochet by Ukuthunga Handmade



Source: Ukuthunga Handmade

Ukuthunga Handmade is a non-profit organisation dedicated to empowering over 60 women from rural communities near the Kruger National Park. What began with just five women has since grown into a sustainable livelihood and development programme centred around the creation of handcrafted crochet toys. Today, these products are sold at The Park's Shops in the Kruger and Addo Elephant National Parks, as well as across the wider Tourvest retail portfolio. These premium locations include Out of Africa Kids at OR Tambo International Airport, and Out of Africa branches at Cape Town International Airport and Cape Point.

Logistics is a barrier to small-scale farmers



Source: Walking Safaris

While lodges sought to support local farmers, logistical barriers and cold-chain failures made individual sourcing unworkable. To bridge this gap, Seolo Africa started a mobile fridge initiative in 2018. Through annual grants, the initiative sponsored a dedicated 4x4 bakkie and a refrigerated trailer, establishing a reliable cold-chain capability. This innovation ensures produce remains fresh from farms to lodge, significantly lowering transport costs while removing delivery risks for small-scale farmers. Furthermore, value was added through agri-processing by washing, cutting and packaging the vegetables. Partnering with local leader Creseldah Ndlovu, this model delivers better sourcing, tangible economic change, and a sustainable link between community production and tourism consumption.

Wellness inspired by local women



Source: Nkambeni Spa

Located on community-owned land, Nkambeni Camp, operated by aha Hotels & Lodges, is a cooperative sustainable tourism initiative. Originally, wellness services were informal, provided ad hoc by a single community member. To foster sustainable careers for vulnerable women, the Camp invested in formal infrastructure and mentorship. Through a strategic partnership with Amani Spa & Wellness, a fully equipped facility with three therapy rooms was established. Today, the Nkambeni Spa is entirely managed by local women, employing eight professionally trained therapists. This initiative has successfully transformed a casual service into a professional enterprise, with these women now driving the camp's wellness offering.

A cable that connects us



The Park's Shop firewood supplier



Source: Table Mountain Aerial Cableway

The Table Mountain Aerial Cableway Company has achieved a remarkable supply chain transformation. By 2024, procurement from local SMMEs surged to 70%, up from 27% in 2017. Expenditure with Black-owned and Black women-owned entities exceeded targets by 107% and 206%, respectively. Tangible projects drive these figures. To mention a couple, the company is transitioning to locally manufactured sugarcane bagasse eatware. Another unique initiative empowers the Grabouw community to repurpose old cables into merchandise and medals for the Table Mountain Charity Challenge. Looking ahead, 2026 marks the launch of the Vetkat Art Foundation. This initiative will support enterprises that preserve and commercialise Khoisan art, music and storytelling. Thus, reinforcing the company's commitment to SG principles.

Source: The Park's Shop

Since 2023, Tourvest has supported Nomsa Sitole's Phalaborwa-based business by awarding grants valued at R700 000. This funding enabled the acquisition of a delivery vehicle, facilitating weekly deliveries to The Park's Shops. Additionally, Tourvest designed a commercial brand for Ngomthi Firewood, which is proudly displayed on the new vehicle. The initiative also covered the purchase of two stands and two new storerooms capable of holding 20 000 bags of firewood. Ultimately, this support and other related initiatives yield an estimated R1.6 million in wood supply and sustain 24 employees annually, under the supplier development programme.

as staff are trained and sensitised in sustainable practices and possess a nuanced understanding of how to interact responsibly with the fauna and flora in these sensitive conservation areas. To extend this impact, many concessions offer awareness and educational programmes tailored for local school children, community members and internal staff, fostering a broader culture of conservation.



Sustainability is also prioritised through practical waste management and advanced green solutions. All concessions implement recycling and basic eco-friendly practices, while most lodges frequently invest in the installation and maintenance of off-the-grid solar, water and sewage systems. In dining and retail spaces, there is a concerted effort to utilise eco-friendly packaging, and some activity-based centres provide water purification systems to allow participants to refill their bottles. Furthermore, maintenance and cleaning activities prioritise the use of biodegradable or eco-friendly chemicals whenever possible.

A key benchmark for these efforts is Fair Trade Tourism certification, which is viewed as an essential standard for the industry. Other certifications, such as the pursuit of Dark Skies Certification to reduce light pollution and preserve the nocturnal environment, can also be considered. Those concessions currently certified emphasise its importance, as it transcends basic responsible tourism by fully embracing Environmental, Social and Governance (ESG) principles and driving the global Sustainable Development Goals (SDG) agenda. Other notable examples include the implementation of rigorous environmental data monitoring and the appointment of dedicated environmental control officers to ensure on-site compliance. Additionally, unique initiatives like “Class in the Clouds” highlight the creative approaches concessions are taking toward conservation education.

6.4. Integrated Sustainability

A key area of success in community upliftment involves prioritising more meaningful and long-term community projects by making tangible investments through vehicles

such as the Impact Fund. Many of the concessions support local early childhood centres and schools by, for instance, covering teacher salaries and funding the construction of new classrooms and vegetable gardens. Various school- or study-related sponsorships or education programmes - are also provided by concessions. Another vulnerable group targeted for social investment are the elderly and facilities supporting their needs. It is important to state that most concessions fulfil numerous small requests to support individuals, groups or organisations in the local community through donations, vouchers, gift sponsorship, discounted rates, etc. Concessionaires further value their involvement in either hosting or sponsoring local charity events such as charity challenges, golf days, etc.

Simultaneously, environmental responsibility is highlighted by heavy investments in solar plants and sophisticated monitoring systems to reduce power usage, alongside upholding strong environmental due diligence through annual inspections and the implementation of recycling and water purification systems. Some concessions also assist in clearing alien invasive species and supporting conservation initiatives of SANParks or associated NPOs. Finally, consistent dedication to responsible practices is evident in a handful of operators who obtained Fair Trade Accreditation.

Concessionaires proactively address capacity gaps through community and environmental initiatives, yet they face significant regulatory and operational hurdles. Environmentally, the conservation authority’s inefficiency often forces operators to independently manage essential services, such as refuse, sewage and invasive plant clearing. Socially, complex frameworks currently prevent concessions from receiving BEE recognition for vital human-centric support, such as funeral costs. To resolve these issues, recommendations should focus on streamlining regulatory processes to officially recognise community contributions and establishing collaborative platforms between concessions, NPOs and SANParks to fund sustainable, large-scale projects. Ultimately, clearer lines of responsibility and better resource allocation are required to reduce the operational burden on concessionaires and provide better guidance on sustainable practices.



Photo by Linda Schoeman

More than a New7Wonder of the World



Source: Table Mountain Aerial Cableway

For the Cableway, responsible tourism is more than a policy; it is a driving passion. The organisation is committed to protecting the environment and uplifting local communities to build a sustainable future. Its “Class in the Clouds” programme, launched in 2001, has enabled over 353 000 learners to experience Table Mountain and learn about nature, hosting 20 000 students annually. Additionally, the annual Cableway Charity Challenge has raised over R16 million since 2009. These funds support educational initiatives for underprivileged communities and critical agencies like Wilderness Search and Rescue (WSAR), ensuring the safety of both people and the mountain. The Cableway reaffirmed its dedication to sustainability and community upliftment in 2024 by signing an updated Responsible Tourism Charter.

Pillars of Hope



Source: : Kruger Shalati

The Kruger Shalati has a programme called Pillars of Hope, which empowers communities through conservation, education, farming, small business and sport. Short-term actions include donation drives, sports involvement, participation in events, work experience, etc. Conversely, long-term success relies on strategic funding for bursaries, enterprise development and new agricultural methods like hydroponics. From water conservation to school construction, the organisation leverages partnerships to support rural livelihoods.

An International Dark Sky Sanctuary



Source: Ae!Hai Kalahari Heritage Park

In 2019, the !Ae!Hai Kalahari Heritage Park became Africa’s first International Dark Sky Sanctuary, preserving one of the world’s most isolated nightscapes. !Xaus Lodge, a community-owned, Fair Trade Tourism Certified, is the responsible steward for protecting the natural darkness vital to desert ecology (essential for night-hunting predators to navigate by the Milky Way). Here, the Khomani San guides weave the stars into their storytelling, bridging culture and nature. This dedication was recognised in 2020 when World Travel Market Africa awarded the lodge as the “Most Compelling Sustainability Story”, while National Geographic named the Kalahari a top global destination.

Rising From the Ashes



Eco-Initiatives On the Green



Source: Tintswalo Atlantic

The fires that swept across the Cape in March 2015 were some of the worst in history. Since Tintswalo is one of the most remote properties in Cape Town, firefighters were unable to save the lodge that burnt down. Through the immense support by the local community the lodge was rebuilt, and again in 2018, when an accidental fire burnt down the lodge for a second time. Just as Tintswalo rose from the ashes, the Amoyo Performing Arts Foundation sees children rising above their circumstances through the arts. Even while the lodge was being rebuilt after the fires, continued support was provided, including food and transport, to ensure that these aspiring artists could attend practices. Their commitment extends beyond logistics. Guests can enjoy commissioned performances by Amoyo, offering the children vital exposure and a global audience. This is just one story showing how acts of kindness and community involvement can ensure tourism thrives, even during extraordinary external events.

Source: : Skukuza Golf Course

Skukuza Golf Course highlighted its sustainability efforts through various conservation measures. Initiatives included implementing recycling processes, reviewing waste management operations, and considering a solar plant installation. A key achievement is the exclusive use of eco-friendly fertilisers and detergents to protect the sensitive environment. Additionally, Indalo Hotels and Leisure invested in the redesign of the course and clubhouse to better merge with the natural landscape. Thus, blending the facilities into the natural landscape, aligning with the safari experience that visitors expect in the Park.

The first buyer of Carban Credits



Cattle Baron supports Local Children



Source: Cattle Baron Addo

As part of their winter outreach initiative, the Cattle Baron teams across Addo, Tsitsikamma, Skukuza and Satara provided children with warm jerseys, fleece jackets and hearty meals. The beneficiary centres included Nomothamsanqa Edu Care, Tsitsikamma Educare, Ilitha Creche, N'weti Day Care and Bongani Day Care. These simple, yet powerful contributions, not only offered physical comfort during the colder months, but also fostered a strong sense of community responsibility.

Source: TASC

Driven by a deep commitment to sustainable tourism, Singita minimises its ecological footprint through comprehensive green initiatives, including utilising solar energy for up to 80% of its power needs, conserving water via rainwater and greywater systems, and successfully eliminating 99% of single-use plastics. The lodge further ensures a positive impact on both the environment and local communities by prioritising recycling and minimising food waste. Advancing these carbon-offsetting efforts into 2026, the concession has taken a future-forward step by becoming the first buyer of carbon credits from the GRASS project, spearheaded by TASC. This pioneering initiative works with farmers to restore rangelands and has earned Verified Carbon Units with a Climate, Community and Biodiversity label under Verra's VM0042 methodology.

7. KEY CONSIDERATIONS

Overall, the commercial partnership framework between SANParks and concessionaires is functioning effectively, with core financial and operational arrangements generally well understood and implemented. Many operators report constructive and resilient working relationships with SANParks, including during challenging periods such as the COVID-19 pandemic, reflecting a shared commitment to sustaining both conservation and commercial viability.

While these positive experiences are evident in several concessions, there are opportunities to further strengthen collaboration and alignment across the portfolio. Enhancing open communication, mutual problem-solving and proactive partnership management will help ensure that all concessionaires experience the same level of trust, responsiveness and shared purpose.

The considerations outlined below therefore focus on deepening partnership effectiveness, strengthening relationship management and fostering a more integrated, solutions-oriented approach to Public-Private Partnerships within SANParks.

Contractual Complexity and Ensuring Alignment

Analysis of concessions indicates that operational success is closely tied to clear contracts and proactive planning. A primary lesson learned is that highly complex contracts often lead to disputes and deadlock rather than reflecting thorough due diligence. To address this, parties can benefit from conducting joint workshops to build mutual understanding

and refine contractual obligations. It is also helpful to establish clear roadmaps for eventual project exit and asset handover from the outset. Extended contracting delays can significantly undermine a project's financial viability. Multi-year bidding processes expose projects to economic and political shifts, which can render original financial models outdated before implementation begins. Consequently, streamlining the bidding process and incentivising long-term value through performance-based renewal options are effective strategies.

Operational Clarity

Ambiguity in roles, particularly regarding high-cost maintenance, frequently contributes to asset deterioration. When responsibilities and performance standards are not explicitly defined, both parties may defer necessary upkeep, resulting in substantial maintenance backlogs of properties and supporting infrastructure. Experience has shown that poorly maintained public facilities and substandard hospitality at park gates severely degrade the guest experience. Alongside physical improvements, there must be a continuous, active effort to elevate front-line communication and service standards for concession guests arriving at park entrances.

Marketing and Collaboration

A key lesson learnt is that collaboration between SANParks and the concessions is critical, for instance, inadequate marketing of concessions and unconsulted gate fee increases actively hinder visitor growth. With the market shifting toward last-minute bookings and tourists concentrating heavily on Greater Kruger and Cape Town, local visitors often perceive private concessions as too

expensive. To counter this, future success relies on implementing a modernised, centralised collaborative marketing platform and improving physical signage. Furthermore, it is essential to actively educate both customers and SANParks staff on the inherent value of PPPs.

Human Capital and Social Responsibility

Staff welfare and hiring suffer from substandard housing, personnel friction, communication breakdowns, entitled claimant dynamics, and unrecognised BEE contributions. To resolve these issues, SANParks must expedite housing projects via EIA assistance, improve park access, and establish clear communication channels. Furthermore, overcoming workforce challenges requires aligning non-monetary benefits, supporting career development (for example the YES programme), and securing clarity on BEE obligations in terms of the Tourism B-BBEE Sector Code, Employment Equity Act and the PPP specific requirement

Strategic Exit Planning and Maximising Revenue Stability

Inadequate exit planning and reliance on short-term contract extensions can introduce notable financial and operational risks. Without a structured one- to three-year exit planning period, concessionaires may naturally reduce capital reinvestment in their final years. Additionally, using short-term extensions as an administrative measure can disrupt operational stability, impact staff morale, and leave public entities reliant on outdated fee structures. To support revenue and asset preservation, prioritising long-term tendering and regular fee model reviews is advisable.



Photo by Linda Schoeman

8. CONCLUSION

The vested interest of concessionaires extends beyond profit. Their goal is to elevate our natural heritage to iconic status by delivering world-class, responsible tourism experiences. The socio-economic benefits reported was only for the 2024/25 financial year. Imagine the impact that was made over the past 20 years by SANParks PPPs.

The findings of this study confirm that the commercialisation of tourism through PPPs within South African National Parks generates substantial and measurable socio-economic value. Far from being limited to concession fees alone, the PPP model creates wide-ranging economic, employment, fiscal and transformation impacts that extend across provincial and national production systems.

During the 2024/25 financial year, concession operations contributed meaningfully to SANParks' historic R4 billion revenue milestone and injected R2.38 billion in visitor spending into the economy. The economic impact modelling demonstrates that these activities translated into approximately R6.2 billion in total production, R2.79 billion in total gross value added and over 10,509 full-time equivalent jobs supported across multiple skills groups. These impacts underscore the catalytic role of tourism

concessions as engines of inclusive growth.

Importantly, the benefits are not confined to core tourism industries. The multiplier effects extend into agriculture, manufacturing, utilities, trade, logistics, business services and informal livelihoods, reinforcing the integrative power of conservation-led tourism within the broader South African economy. Provincial results highlight particularly strong linkages in Mpumalanga and the Western Cape, while smaller provinces also experience developmentally significant employment and income effects.

From a transformation perspective, concessions demonstrate meaningful progress in advancing Black ownership, local employment and skills development. With high levels of Black employment representation, strong local recruitment

patterns and sustained investment in training and enterprise development, the PPP model contributes to broad-based empowerment objectives. Significant localisation of procurement and reinvestment into surrounding communities further strengthens local economic resilience.

However, the vested interest of concessionaires extends well beyond profit. Their shared ambition is to elevate South Africa's natural heritage to iconic global status by delivering world-class, responsible tourism experiences rooted in conservation excellence. These partnerships have positioned SANParks prominently on the international stage, reinforcing the country's reputation as a premier ecotourism destination while ensuring that conservation estates contribute meaningfully to the broader economy.

The socio-economic results presented in this report reflect only the 2024/25 financial year. When considered in the context of more than two decades of PPP implementation, the cumulative impact of SANParks' commercialisation programme is profound. Over the past 20 years, sustained private investment, infrastructure development, job creation and enterprise support have shaped regional economies and strengthened conservation funding streams at scale.

The COVID-19 pandemic fundamentally reshaped the tourism landscape. It compelled businesses to become more agile, resilient and community-focused, while accelerating global shifts in traveller preferences toward regenerative and purpose-driven tourism. Concessionaires have adapted by embedding sustainability, community upliftment and environmental stewardship more deeply into their operations. There has been a deliberate effort to reframe tourism employment from short-term,

seasonal work to long-term career pathways supported by structured training, succession planning and skills development.

Tourism within protected areas remains a renewable, low-extractive economic activity that aligns financial incentives with biodiversity protection. Unlike extractive industries, ecotourism monetises the conservation asset without depleting it, reinforcing the principle that healthy ecosystems underpin sustainable economic growth.

It is therefore critical that the PPP model be recognised as the practical and natural fit for managing consumer-driven activities within state-owned natural assets. By leveraging private-sector expertise, capital and market agility, SANParks is able to focus on its core conservation mandate while ensuring that tourism operations are professionally managed, financially sustainable and globally competitive. This approach aligns directly with the Tourism White Paper's vision of a government-led, private sector-driven industry.

In conclusion, the commercialisation of tourism in South African National Parks represents a strategically sound and developmentally impactful model. PPPs are not peripheral commercial arrangements; they are foundational instruments for conservation financing, transformation, employment creation and regional economic integration. By continuing to strengthen collaborative governance, deepen local value retention and align tourism growth with regenerative principles, SANParks can further solidify conservation as a driver of resilient, inclusive and sustainable development across South Africa.

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ABBREVIATIONS AND ACRONYMS

| | |
|-----------------|--|
| BDU | Business Development Unit |
| BEE | Black Economic Empowerment |
| DMC | Destination Management Company |
| ESG | Environmental, Social and Governance |
| FGASA | Field Guide Association of South Africa |
| GDP | Gross Domestic Product |
| GOS | Gross Operating Surplus |
| GVA | Gross Value Added |
| I-O | Input-Output Matrix |
| M&E | Monitoring and Evaluation |
| MLLs | Mega Living Landscapes |
| NEMPA | National Environmental Management of Protected Areas Act |
| NPO | Non-profit Organisation |
| POPIA | Protection of Personal Information Act |
| PPE | Personal Protective Equipment |
| PPP | Public-Private Partnership |
| R | Rand |
| SA | South Africa |
| SAM | Social Accounting Matrix |
| SANParks | South African National Parks |
| SEB | Socio-Economic Benefits |
| SETA | Sector educational and training authority or agency |
| SIC | Standard Industrial Classification codes |
| SMME | Small, Medium and Micro Enterprises |
| TSA | Tourism Satellite Account |
| WSAR | Wilderness Search and Rescue |



Photo by Linda Schoeman

DEFINITIONS

| CATEGORY | TERM | DEFINITION |
|--|---|---|
| ENTERPRISE TYPE (ANNUAL TURNOVER) | Large Enterprise | A company that has a turnover of more than R45 million per annum, according to the Tourism B-BBEE Sector Code. |
| | Qualifying Small Enterprise | A company that has a turnover of between R5 million and R45 million per annum, according to the Tourism B-BBEE Sector Code. |
| | Exempted Micro Enterprise | A company that has a turnover of less than R5 million per annum, according to the Tourism B-BBEE Sector Code. |
| TOURISM MARKET & REVENUE | Tourism Operator | Tourism and related-services operator on reserve with no primary role in reserve management functions, e.g., tourism concessions. |
| | Visitors | The number of people who visit a place or event. |
| | Bed nights | Number of beds occupied by visitors per night for a specific period. |
| | Sales | Total quantity of sales transactions made within a specific period of time. |
| | Concession income | Accommodation (e.g., lodges, campsites, self-catering, timeshare, etc.) – paid accommodation at formal establishments on the reserve, excluding visiting friends and family of staff. |
| | | Restaurants and related services – paid food and beverage on the reserve, excluding food and beverage not purchased in the area. |
| | | Public transport – paid transport to and from the reserve and within the reserve, e.g., tour buses, minibuses, aeroplanes, shuttles and car rentals, excluding personal vehicle use. |
| | | Recreational and Cultural Activities – paid recreational and cultural activities on the reserve, including safaris/tour guiding, adventure activities, cultural dances, etc. |
| | Retail – purchase of tourism-related merchandising, crafts and local products. | |
| | Others – purchase of non-tourism-related items, e.g., petrol, toll fees, banking services, etc. | |

| CATEGORY | TERM | DEFINITION |
|------------------------|----------------------------------|---|
| ECONOMIC IMPACT | Direct Effect | The immediate results of an economic activity from the direct expenditure or investment. On-site impact in terms of production, GVA, income, jobs and taxes. |
| | Indirect Effect | These are the supply chain responses to the direct activity. The multiplier determines the potential purchase of goods and services from other local businesses, thus reflecting the business-to-business transactions. Supplier or value-chain impact in terms of production, GVA, income, jobs and taxes. |
| | Induced Effect | These are the consumer spending impacts from wages earned in the first two stages. Results from employees spending their income on goods and services, including things like housing, groceries, entertainment and transportation. Consumer/household impact in terms of production, GVA, income, jobs and taxes. |
| | Total Effect | Together, these effects form the total economic impact, often exceeding the original investment due to the multiplier effect. Accumulative impact of direct, indirect and induced. |
| | BEE & EMPLOYMENT | BEE Obligations |
| | Black People | Shall have the meaning ascribed to it as in the BBBEE Act. |
| | Community Trust Ownership | Means equity in the private party, which must, as a mandatory provision of the project, be acquired by a community trust. |
| | Direct Ownership | It means ownership of an equity interest in an enterprise. |
| | Employee | A person employed for wages or salary on a permanent or temporary contract (including fixed-term contract workers). |
| | Total staff | Refers to all employees and/or contractors, excluding those accounted for under Strategic Representation, for whom the tourism enterprise is responsible for the collection and payment of applicable employee tax. The intention is to include temporary staff in the definition of total staff, since tourism is an industry that relies heavily on temporary, casual and seasonal staff. |

| CATEGORY | TERM | DEFINITION |
|---------------------------------|-------------------------------------|--|
| | Local | Means the geographic area specified by SANParks in respect of the Concession, being either within a 50 km radius of the Facility or within a 30 km reach of the boundary of the Protected Area fence (but excluding boundaries to the neighbouring countries). |
| | Skilled employee | Employees who earn above the income bracket of R12 781+. |
| | Semi-skilled employee | An employee who earns within the income bracket of R7 030 – R12 780. |
| | Unskilled employee | An employee who earns within the income bracket of R1-R7 029. |
| | Skills Development Programme | An occupation-based learning programme aimed at building skills that have economic value. |
| PREFERENTIAL PROCUREMENT | Operational expenditure | Money spent on the ongoing costs of running a business or organisation, such as wages, maintenance, administration, etc. |
| | Capital expenditure | Money spent by a business or organisation on acquiring or maintaining fixed assets, such as land, buildings and equipment. |
| | Procurement | The act of obtaining goods or services from suppliers or service providers. |
| | Local procurement | Amount of procurement allocated to suppliers residing in the province in which you operate. |
| | Empowering suppliers | Empowering suppliers are BBBEE-compliant organisations that comply with all country regulatory requirements. |
| | Black Empowered SMME | Means a small, medium or micro enterprise (with a turnover of up to R10 million per annum) which has between 25 per cent and 50 per cent direct ownership and is managed by Black people. |
| | Black-Owned SMME | It means a small, medium or micro enterprise (with a turnover of up to R10 million per annum) which has more than 50 per cent direct ownership and is managed by Black people. |

| CATEGORY | TERM | DEFINITION |
|--------------------------|--|--|
| SOCIAL INVESTMENT | Capital-related programme | Upgrade/new infrastructure in the local community, such as funding school developments, community halls or facilities, water provision services, etc. |
| | Community development programme | Community social investment projects in the local community, e.g., bursaries, poverty alleviation programmes, anti-crime projects, environmental preservation and/or educational programmes. |
| | Donations | A donation is a gift for charity, humanitarian aid, or to benefit a cause. A donation may take various forms, including money, services, or goods such as clothing, food, vehicles or games. |



Photo by Linda Schoeman

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Photo by Linda Schoeman





South African
NATIONAL PARKS

“People and nature
thriving together in
sustainable mega
living landscapes”

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