

DO WE REALLY UNDERSTAND ACCOMMODATION PREFERENCES OF VISITORS TO THE KRUGER NATIONAL PARK?

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Introduction

- The KNP offers tourists an array camp-run accommodation including chalets, camping (caravans or tents), huts, safari tents, bungalows, cottages, family cottages, guest cottages, guesthouses and luxury lodges
- In 2016, a new **240-bed Kruger National Park hotel** was approved
- Such products have been offered by the private sector outside the park in concession areas for a long time, while the KNP in the past only offered self-catering facilities throughout the park
- **Although hugely popular, they fall short in meeting the needs of the international market**
- SANParks also launched their newest camp, the **Pafuri Border Camp** in November 2015



Research rationale

Four key issues necessitate this research:

1. **Increased competition** – competition getting stronger regarding innovation in their product and accommodation offerings
2. **The decrease in government grants** has obliged SANParks to rely more heavily on tourist spending - emphasises the need to understand the changing needs of the market
3. **Lack of empirical research** on the accommodation sector, in particular, wildlife/nature-based accommodation (protected areas)
4. **Development initiatives in the KNP must be based on the needs and preferences of the market** and without neglecting the needs of the parks' existing markets

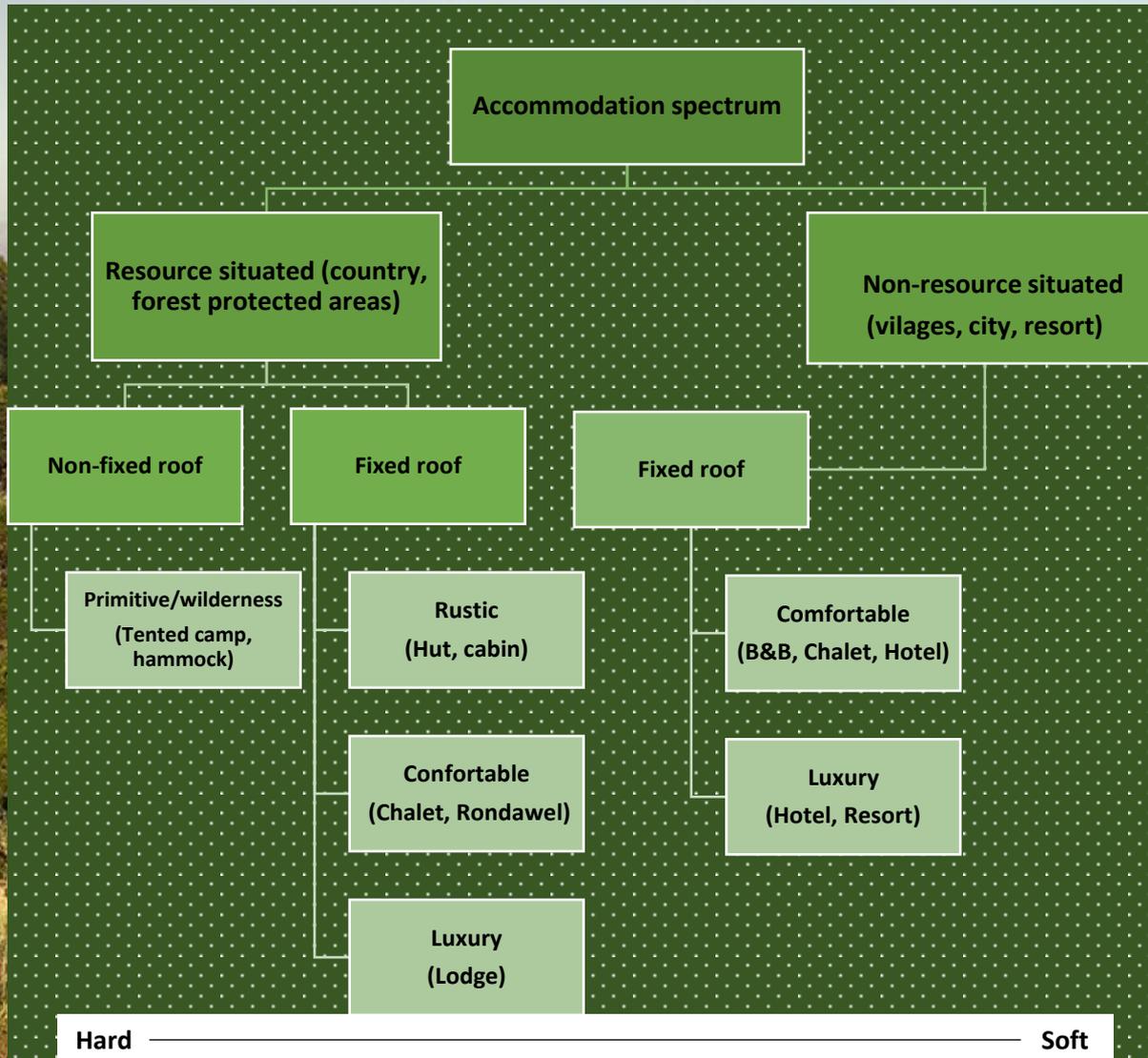


Purpose of research

- To determine **visitors' accommodation preferences** when selecting accommodation in the KNP (fixed roof and camping), and based on these preferences, **to segment, and identify different market segments**
- This information can be used by Park management when planning, developing and upgrading accommodation facilities in the Park



Literature review



Attributes influencing accommodation selection

- **accommodation type** (is it more rustic, intimate and adventure-type, representative of its setting?);
- **environmental sensitivity** (does it demonstrate credibility and sensitivity to its environment, regarding location, building and 'green' or conservation practices?);
- **cultural sensitivity** (does it fit in with cultural or local community preferences?);
- **programming** (does it feature a package of environmentally-based interpretive experiences?);
- tourist look for **uncrowded, remote, learning about nature/wildlife; scenic qualities, located near places where movement of wildlife can be observed;**
- **friendly staff, value for money, decent sanitary conditions, and quality of the environment and landscape**
- Activity participation, consumer demographics, travel party size and composition and travel motives also influence choice of accommodation type



Market segmentation of the nature tourist

- **Market segmentation** is a fundamental practice in marketing research, which involves the process of dividing markets into smaller subgroups that share common characteristics
- Segmentation bases include **geographic, demographic, psychographic, and behavioural traits**
- KNP visitors seem to be fairly **homogeneous**
- As a result, the KNP currently uses a “shotgun” marketing and product development approach, ignoring subtle differences in the market
- KNP management **should use a diversified marketing and management strategy** designed to suit the distinct needs and preferences of different market segments traveling to the Park



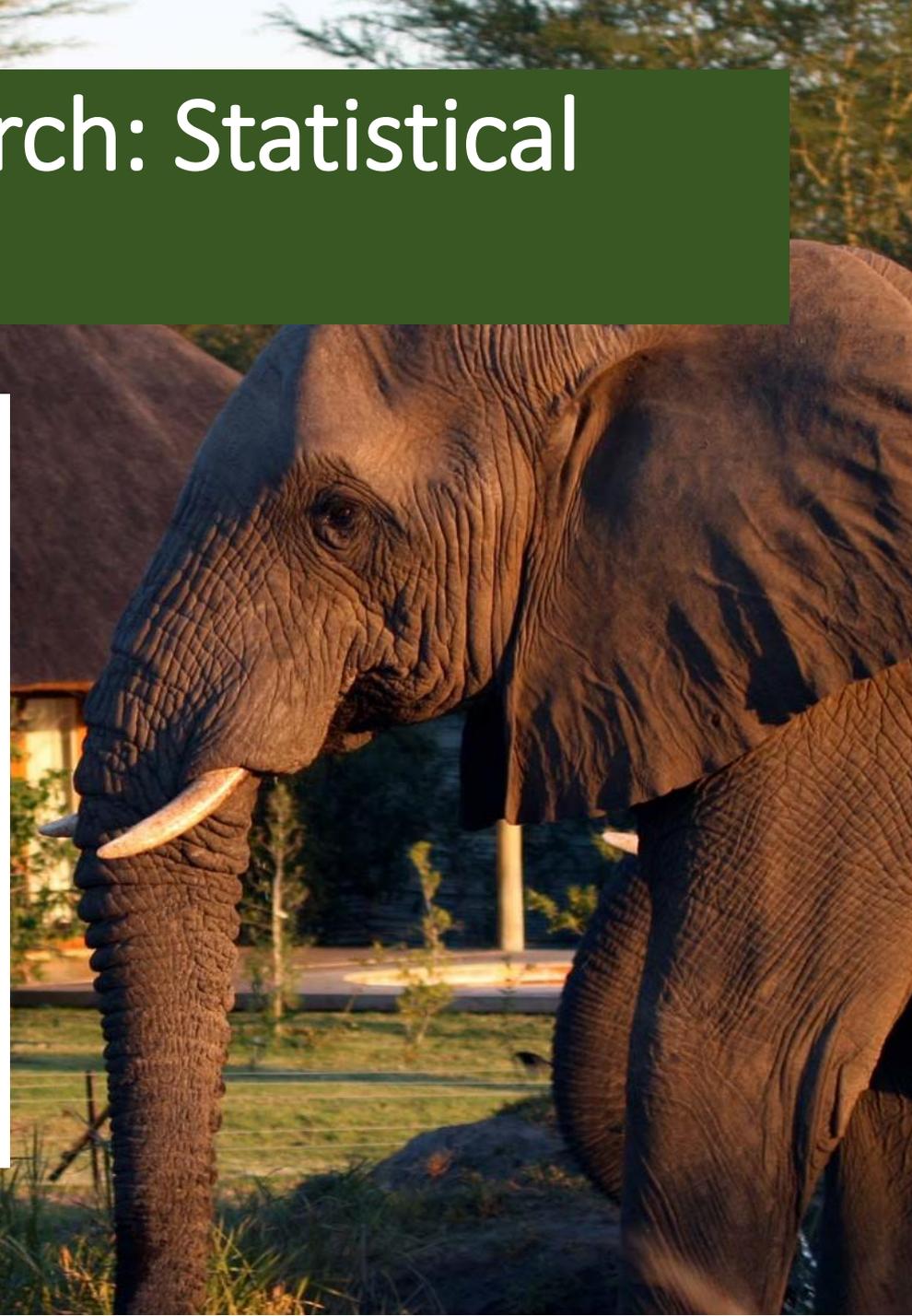
Method of research: Survey and sampling method

- An **overnight visitor survey** (self-administered questionnaires) in the **Northern Region** of KNP from 13 to 17 December 2015
- A **convenience sampling method** - questionnaires were distributed to available overnight visitors (camping and chalet)
- Rest camps included: **Olifants** (58 questionnaires); **Mopani** (66 questionnaires); **Shingwedzi** (109 questionnaires) and **Letaba** (119 questionnaires)
- **352 fully completed questionnaires**
- Respondents were segmented based on their accommodation preferences = 294 usable questionnaires



Method of research: Statistical analyses

- The data was captured using Microsoft Excel© and analysed using SPSS Version 23 (Statistical Package for the Social Sciences [SPSS], 2016) and Statistica (Statsoft, 2016)
- The analysis was performed in four stages:
 1. **a descriptive analysis to profile the respondents**
 2. **three factor analyses (fixed roof accommodation attributes, campsite preferences and accommodation preferences)**
 3. **a cluster analysis based on the accommodation preference factors**
 4. **an analysis of significant differences between different market segments**



Results: Profile of respondents

- Male (53%)
- Afrikaans-speaking (52%)
- An average age of 43 years
- Residents of Gauteng (55%)
- High annual gross income of >R672 000 (32%)
- Travelled in groups of 4 persons, paid for 3 persons
- Spent an average of R11 378 during their stay of an average of 6 nights
- Wild Card holders (70%)
- Travelled to the KNP as an overnight visitor an average of 5 times over the past three years



Factor analysis:

Fixed roof accommodation attributes

Fixed roof accommodation attributes	Comfort and natural setting	Décor	Scale of operations	Basic amenities
Units must be comfortable and functional (easy to move in/outside)	.711			
Units must be located near highly viewable wildlife resources (waterholes, mountains, rivers, forests)	.710			
Economy accommodation units (en-suite bath and kitchen areas)	.701			
Units should embrace ecological alternatives (thatched roofs, solar energy, natural heating/cooling)	.690			
Accommodation units that fit the natural surroundings	.677			
Natural heating and cooling design for units	.643			
Units should have a scenic view	.622			
Units must not be exposed to human noise, traffic, artificial lighting	.620			
Units must have outside cooking areas	.485			
Different units must have separate themes/décor		.817		
Locally made bedding and table cloths should be used		.800		
Units must have both a bath and shower		.421		
Fewer number of accommodation units per rest camp			.775	
Units must have outside shower facilities			.726	
Units must have either a bath or shower				.798
Units must have a porch (stoep)				.534
Reliability coefficient	0.84	0.61	0.60	0.60
Average inter-item correlation	0.37	0.35	0.38	0.28
Mean value	4.01	2.67	2.57	3.95

Factor analysis: Campsite attributes

Campsite preference attributes	Structural layout and convenience	Large group exclusivity	Ablution facilities	Amenities
Each camp site stand must have its own water point (tap)	.814			
Each camp site stand must have its own electricity outlet	.761			
Each campsite stand must each have its own braai facility	.717			
All campsite stands must be closely located to ablution facilities and wash-up areas	.709			
Each stand should have its own small private ablution and wash-up area	.645			
Campsites must be located close to wildlife attractions (waterholes)	.627			
Large groups (more than 5 tents) should be accommodated in areas separate from normal campsites		.725		
Large groups (more than 5 tents) should have their own private facilities for cooking and ablution		.694		
Campsite numbers should be allocated upon booking		.669		
Campsite ablution facilities must only have showers		.568		
Wilderness camps (4-8 units)		.533		
Wilderness campsite with no facilities (no toilet or shower)		.465		
Communal ablution facilities and wash-up area			.792	
Limited number of stands (2-4) sharing ablution and wash-up area.			.701	
Wilderness (rustic) campsite with basics sharing toilet & shower)			.650	
Camp site ablution facilities must have a shower and a bath				.853
Camp site facilities must have a laundromat				.644
Reliability coefficient	0.86	0.74	0.63	0.65
Average inter-item correlation	0.51	0.32	0.36	0.48
Mean value	3.77	3.13	3.30	3.06

Factor analysis: Accommodation preferences

Type of preferred accommodation	Safari accommodation	Serviced accommodation	Self-service accommodation
Tree tents	.822		
Tented camps	.811		
Safari tents	.798		
Tree top chalets	.758		
Log cabins	.740		
Budget accommodation units	.513		
Guest house (full plate dinner, bed, breakfast)		.826	
Luxury accommodation units (5-star SANParks concessions)		.729	
Guesthouse (which can accommodate more than one family)		.716	
Dormitory (backpackers)		.646	
Chalets			.864
Bungalows			.854
Reliability coefficient	0.85	0.74	0.77
Inter-item correlation	0.48	0.41	0.63
Mean value	3.28	2.54	3.93

Results: Cluster analysis

Segment characteristics	Segment 1	Segment 2	Segment 3	F-ratio	Sig. level
	Self-service seekers	Servicescape seekers	Self-safari seekers		
	N=125	N=170	N=62		
Safari accommodation	2.74 ^a	3.26 ^b	4.22 ^c	57.357	.001*
Serviced accommodation	1.61 ^a	3.46 ^b	2.49 ^c	230.734	.001*
Self-service accommodation	3.37 ^a	4.01 ^b	4.77 ^c	48.916	.001*



Results: ANOVAs

Segment characteristics	Segment 1	Segment 2	Segment 3	F-ratio	Sig. level
	Self-service	Servicescape	Self-safari		
	seekers N=125	seekers N=170	seekers N=62		
Socio-demographics					
Av. age	44.19	41.36	41.47	1.598	.204
Av. no. of people in group	3.62	3.86	3.56	.796	.452
Av. no. of people paying for	2.92 ^{ab}	3.33 ^a	2.74 ^b	2.954	.054
Av. no. of previous visits as a day visitor	1.26	2.34	1.39	1.270	.283
Av. no. of previous visits as an overnight visitors	4.98	4.31	3.88	1.078	.342
Av. no. of nights in the park (if overnight visitor)	6.99	6.17	5.73	2.544	.080
Average spending (ZAR)					
Entrance and conservation fee	859.73	836.63	577.65	1.028	.359
Accommodation	6964.56	5045.48	5159.67	3.855	.022*
Restaurants	887.49	756.28	737.90	.584	.558
Food	1081.70	1157.06	1125.49	.095	.910
Beverages	584.77	607.33	567.40	.068	.934
Clothes and footwear	123.91	223.53	182.50	1.073	.344
Return transport	2344.95^a	1517.09^b	1434.62^b	4.445	.013*
Souvenirs	205.00	158.67	188.65	.333	.717
Activities	271.65	260.14	305.62	.109	.897
Other	58.72	70.47	73.08	.038	.962
Total spending	11741.12^a	8529.36^b	8625.13^b	5.064	.007*
Spending per person	4332.16^a	3026.07^b	3825.01^{ab}	4.038	.019*

Results: ANOVAs

	Segment 1	Segment 2	Segment 3		
Segment characteristics	Self-service seekers N=125	Servicescape seekers N=170	Self-safari seekers N=62	F-ratio	Sig. level
Fixed roof accommodation attributes					
Comfort and natural setting	3.88 ^a	4.10 ^b	4.25 ^b	7.766	.001*
Décor	2.26 ^a	2.94 ^b	2.52 ^a	14.243	.001*
Scale of operations	2.35 ^a	2.51 ^{ab}	2.77 ^b	3.119	.046*
Basic amenities	3.75 ^a	4.00 ^{ab}	4.21 ^b	4.771	.009*
Campsite preference factors					
Structural layout and convenience	3.50 ^a	3.95 ^b	4.00 ^b	7.902	.001*
Large group exclusivity	2.78 ^a	3.22 ^b	3.51 ^b	14.349	.001*
Ablution facilities	3.06 ^a	3.37 ^{ab}	3.70 ^b	7.860	.001*
Amenities	2.69 ^a	3.31 ^b	3.08 ^{ab}	7.078	.001*

Findings and implications

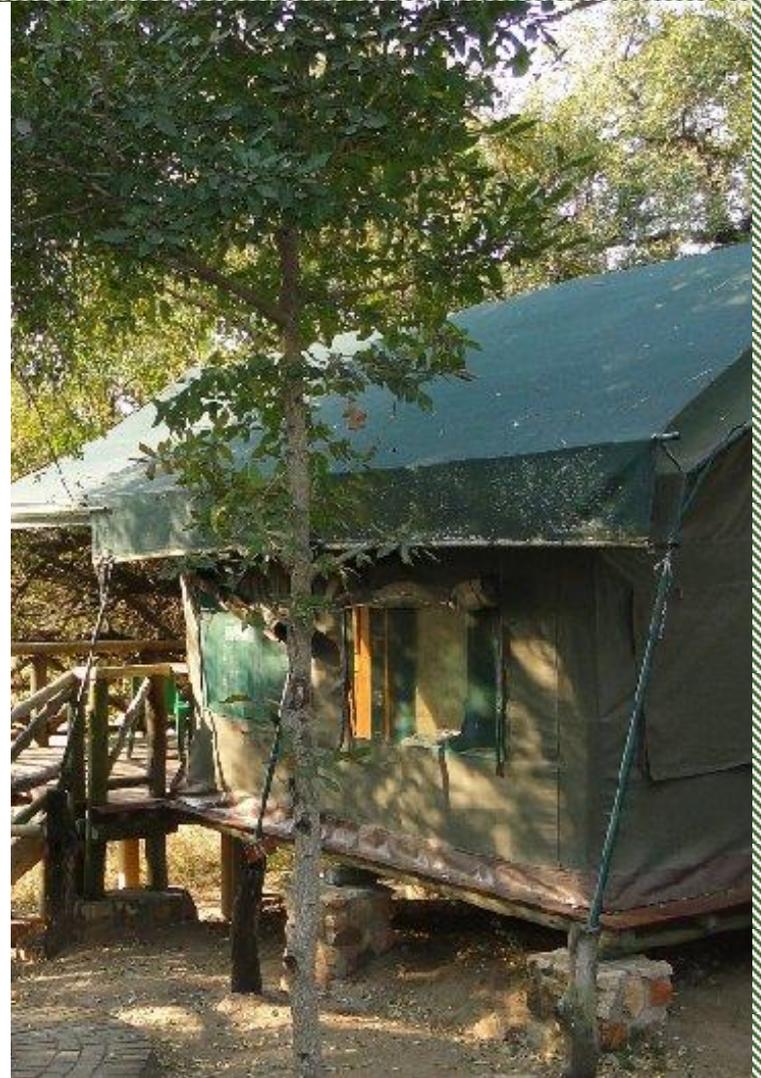
1. **Four attributes when selecting fixed roof accommodation: comfort and natural setting, basic amenities, décor and scale of operations**
 - **Location of units near scenic views** should emphasised in marketing
 - The factor **basic amenities** should be highlighted to **enhance the aspect of comfort**
 - The factor **scale of operations** important as respondents seek **uncrowded experiences**
 - Attention to the **décor elements** is necessary - respondents indicated a preference for more **locally produced products and individualised themes in the units**



Findings and implications

2. Four campsite preference attributes: structural layout and convenience followed by ablution facilities, large group exclusivity, and amenities

- The structural layout of campsites is important - placement of water points, ablution facilities, power (electricity) points, the size of the stand, space between stands
- The number of people per campsite and number of stands per campsite are of great importance - a need for smaller campsites (fewer stands) with private ablution facilities for each stand
- Campsite already adhering to these needs of tourists can be highlighted in SANParks marketing campaign



Findings and implications

- 3. Three taxonomies of accommodation preferences: self-service accommodation** (chalets and bungalows), **safari self-service accommodation** (e.g. tree tents, tented camps, safari tents, tree top chalets, log cabins and budget accommodation units) and **serviced accommodation** (e.g. guesthouses, luxury accommodation units)
 - Self-service and safari accommodation remain the most popular choices of accommodation in the KNP
 - Visitors' demographics, experience sought, availability and price sensitivity could play a role



Findings and implications

4. A **3S-typology of accommodation preference seekers** in the KNP is proposed: **Self-service seekers, Servicescape seekers and Self-safari seekers**
 - Current accommodation offerings in the KNP appeal to a variety of markets
 - All three segments are important markets to sustain and expand, KNP marketers should continue to promote the various accommodation offerings



Findings and implications



5. ANOVA's confirm that **KNP visitors cannot be regarded as homogenous**
 - Each segment had a clear preference for certain attributes when selecting accommodation in the KNP
 - A **diversified marketing strategy** is proposed
 - Differences and preferences should be considered when marketing the various accommodation facilities in the Park as well as when further developments are considered

Conclusion

- First to **segment KNP visitors based on their accommodation** (fixed roof and camping) preferences
- Identified for the first time, the factors important when selecting accommodation in the KNP – added to the literature by identifying the factors important in campsite selection
- **Useful information for marketing purposes as well as when new accommodation developments are considered**
- Future research should take both the Northern and Southern regions of the KNP into consideration, as well as tourists traveling to the Park during winter months as more international tourists visit the Park during these months
- Similar research be done at other national parks, to compare results



Thank you!

Any questions?

In all things of nature there is something of the marvelous - Aristotle

