

Tourists view of what gives Kruger National Park the edge

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Abstract

The tourism industry is becoming competitive by the day and to remain competitive, it is of paramount importance that competitive advantage factors be identified by tourism destinations such as national parks. The purpose of this research was to determine the competitive advantage factors of the Kruger National Park, South Africa's flagship national park. To achieve this goal, a questionnaire survey was conducted at Kruger National Park in 2013 where 436 questionnaires were administered among overnight visitors at selected rest camps in the Southern Region of the park. A factor analysis revealed five competitive advantage factors *Wildlife Experiences, Marketing and Branding, Accommodation and Retail, Visitor Management* and *Suprastructure and Amenities* which Kruger National Parks management can use to improve their current position as a competitive tourism destination. The competitive advantage factors that have been identified is distinct for national parks thereby contribute towards the body of knowledge on this topic. The competitive advantage factors could lead to an increase in product and service quality offered by the park and enhance the visitor's experience, therefore leading to increased visitor numbers to the park and higher income to have the park become more self-sufficient.

Key words:

Nature-based tourism; National parks, Competiveness, Competitive advantage, Comparative advantage; Park management

Introduction

National parks in South Africa are confronted with the reality of generating their own income as government funding are decreasing in real terms (Wade & Eagles 2003:196). This is a major concern for South African National Parks (SANParks) the custodian of conservation, as their daily operational costs are increasing due to increased efforts in protecting the wildlife such as rhinos and elephants from being poached; managing the plant species and destroying alien plants; increased marketing promotions to attract more tourist to the park; improvement and renovations of rest camps to tourist needs and expectations to name but a few reasons for increased operational costs (Du Plessis *et al.* 2012:2912). Therefore the need for South African National Parks to create park specific attributes, products and services that will increase tourist numbers and revenue whilst managing the park in a sustainable manner (Dwyer *et al.* 2009:63; Saayman, 2009:358). South Africa's national parks are regarded as major tourist attractions and major export earners which plays a significant role in the South African tourism industry. Adding to the problem of decreased funding, is the stiff competition among nature-based tourism destinations in South African and across the globe. SANParks currently manages 22 national parks which competes among the estimated 9 000 privately-owned game farms and the 171 provincial parks and local nature reserves within South Africa (Bushell & Eagles, 2007:33; Eagles, 2011:133; Van Der Merwe & Saayman, 2008:154).

The Kruger National Park is one of the world's most renowned national parks and the third oldest national park in the world, covering a staggering 1 962 362 hectares (ha) of land which is larger than the state of Israel or Holland (Dieke, 2001:99; Honey, 1999:339). Situated in the north-eastern side of South Africa bordering with Mozambique and Zimbabwe, the Kruger National Park is known as SANParks' flagship park, offering tourists a variety of 336 tree, 49 fish, 34 amphibian, 114 reptile, 507 bird and 147 mammal species (Aylward & Lutz, 2003:97; Bushell & Eagles, 2007:33; Van Der Merwe & Saayman, 2008:154). With the Kruger National Park offering a distinct nature-based tourism experience for the past 116 years (Braack, 2006:5; Loon *et al.* 2007:264; SANParks, 2014:internet), the majority of park income is through tourism-related activities.

The more competitive a national park becomes, the greater the improvement in services and products (Hu & Wall, 2005:622). Competitiveness has been researched within various disciplines such as management, economics and marketing (Al-Masroori, 2006; Chen *et al.* 2011; Dwyer & Kim, 2001). Based on the products and goods industries, competitiveness in the services industries is currently dominating the global economies. As a result, competitiveness within service industries are increasing and therefore management of tourism destinations should take note of this shift in order to remain competitive within the industry (Ritchie & Crouch, 2003:18). Tourism destination managers have to understand the importance of competitiveness and ways in which it can be enhanced (Gomezelij & Michalic, 2008:294).

It is suggested that a demand side analysis plays a vital role in determining the competitive advantage factors of a destination such as a national park. Due to the constant increase of tourist demand for natural attractions and activities, it is important that the Kruger National Park develops, identifies and implements competitive advantage factors that is specific to the Park (Jurdana, 2009:270). Tourists travelling to the Kruger National Park are purchasing experiences and not necessarily products because their behaviour and emotions whilst interacting with nature, local community or personnel determines the level of experience (Pedersen, 2002:24; Ritchie & Crouch, 2003:73). Therefore, the offering of a wide range of unique tourism-related products and services that is specific and unique to the Park, satisfying the expectations and needs of tourists visiting the Park (Leberman & Holland, 2005:22; Peake *et al.* 2009:107). It can be argued that tourists are more than willing to pay high prices in national parks, if the quality of services and products are of a high standard (Buckley, 2008:6; Kompula, 2006:137; Kuo, 2002:97).

Therefore the aim of this research is to identify the competitive advantage factors that visitors to the Kruger National Park perceive as being important in obtaining a competitive advantage position. Within South African National Parks this type of research has to date and to the authors' knowledge not yet been conducted, and thus it is crucial for all national parks with in the South African borders to remain competitive and sustainable and becoming independent from government funding. The research will assist with creating awareness of tourists' ever changing expectations and needs when travelling to a national park, and Kruger Park management can address this

accordingly as the identification of competitive advantage factors will enable park management to identify distinct product and services areas where the quality of products and services can be improved.

Literature review

The literature review is divided into four sections: competitiveness, the difference between comparative and competitive advantage, competitiveness within a nature-based context as well as previous research on the topic.

Competitiveness

Porter (1985:1), who is known as the father of competitiveness within economics and business management, indicated that the focus of competitiveness is clearly on the development of superior products and services which will place an organisation above its competitors (Huggins & Izushi, 2011:5; Porter, 2008(b):xv; Ritchie & Crouch, 2003:2). Armenski *et al.* (2011:19) and Grant (2008:205) explain that competitiveness occurs when two or more organisations target the same market segment, offer the same products and services, but one organisation shows a higher profit income than that of its competitor(s). Also, competitiveness can be regarded as presenting superior and unique products and/or services which the competitor cannot duplicate and which attract consumers to the same destination, product or service provider year after year (Armenski, *et al.* 2011:19; Cracolici & Njikamp, 2008:336; Crouch, 2011:27; Thompson & Martin, 2010:785). In the instance of the national parks such as the Kruger National Park, competitiveness can only be achieved once the Park has obtained a competitive advantage and continues to maintain that advantage above its peers (Dwyer & Kim, 2003:372; Middleton *et al.* 2009:197).

The destination competitiveness framework developed by Ritchie and Crouch (2003:66-76) shifted the focus to a service-delivery oriented industry by identifying six tourist-related determinants, which include qualifying determinants, destinations management, core resources and attractions as well as supporting factors and resources (Chen *et al.* 2011:249; Go & Govers, 2000:82; Gomezelij & Michalic, 2008:299). Manzanec *et al.* (2007:46) as well as Ritchie and Crouch (2003:2) define a competitive tourist destination as a destination that has the ability to increase tourist expenditure, increase tourist numbers through a satisfactory memorable experience,

increase profitability, ensure that both environment and cultural conservation takes place and, most importantly, ensure the sustainability of the destination for future generations. Since the introduction of competitiveness to the field of tourism, research on the topic has emerged and include the work by Asch and Wolf (2001); Buhalis (2000); Chen *et al.* (2011:249); Crouch and Ritchie (1994); Du Plessis (2002); Dwyer and Kim (2001); Dwyer *et al.* (2003); Go and Groves (2000); Hassan (2000); Kozak (2001); Mihalic (2000) as well as Ritchie and Crouch (2003).

Competitiveness can be achieved when the competitive advantage factors and comparative factors of the destination have been identified and incorporated into its development and improvement (Ritchie & Crouch, 2003:25). Gomezellij and Michalic (2008:294) elaborated on this and indicated that the competitive advantage factors should be implemented in conjunction with the tourism resources and management strategies that is supported by the relevant stakeholders. Competitive advantage factors can include aspects that address the attractiveness of a destination, availability of supporting infra- and suprastructures and possibilities of future development that might increase the profitability of the destination and ensure its sustainability for future generations (Porter, 1985:1; 2008c:4). There is, however, a difference between competitive advantage and comparative advantage that needs to be taken into consideration.

Comparative advantage versus competitive advantage

The basic competitive advantage factors like natural and artificial resources have a great influence on demand conditions such as market type, seasonality, brand awareness and the preferences of the consumers (Navickas & Malakauskaite, 2009:38). Therefore, with the focus on national parks, tourists travelling to a national park seek a complete destination experience, which includes accommodation and catering, transportation, attractions and entertainment, all of which most national parks offer (Page & Connell, 2014:23; Ritchie & Crouch, 2003:19; Van Wyk, 2011:366).

In this sense, Ritchie and Crouch (2003:23) point out that competitive advantage is an organisation's ability to make use of the available comparative factors in such a way that the destination remains sustainable and profitable for the long-term. It is therefore important for organisations to compare products and services, namely to determine

whether or not the organisation still has a competitive advantage (Grant, 2008:367). Comparative advantage factors can be regarded as resources and factors that cannot be changed by any endogenous factor in the correspondent country's economic system (Hong, 2008:54). Typical comparative factors include human resources, physical resources, knowledge resources, capital resources, infrastructure and tourism supra-structure, historical and cultural resources, size of the economy as well as the growth and depletion of resources which tourists would make use of when travelling to a destination (Mihalic, 2000:77; Ritchie & Crouch, 2003:20-22).

In the case of a Kruger National Park, these factors might be used to sustain tourist numbers in order to obtain a competitive advantage as a tourism destination. However, a comparative advantage concerns the availability of natural resources at the destination. Thus, as national parks are established for the protection of biodiversity and natural heritage in a sustainable manner, comparative advantage is relevant (SANParks, 2014:internet), if the Kruger National Park combines its products and services with the aim of becoming more competitive. The implementation of these competitive advantage factors within the various divisions of the Parks is crucial to the success of achieving competitiveness. This would involve considering factors such as cost effectiveness, technology improvements, consumer satisfaction, effective marketing, distribution and consumer management (Thompson & Martin, 2010:212).

Competitiveness within a nature-based and national park context

Competitiveness can only be obtained once competitive advantage factors have been identified that can be managed in order to achieve a competitive market position within a specific sector or industry (Ambastha & Momaya, 2004:45; Hong, 2008:4). Competitiveness revolves around the prospective tourists' needs and wants and not necessarily around the further development of products or services that is already on offer (Middleton *et al.* 2009:197). National parks have to identify competitive advantage factors that are distinct and specific to the national park, which in turn would satisfy the expectations and needs of tourists. Whereas, comparative advantage factors lead to the destination obtaining a competitive advantage it is therefore vital that park management make clear distinctions between competitive and comparative factors (Dwyer & Kim, 2003:372). In the case of park management being negligent

towards these resources it will have an impact on the competitive advantage of the park itself (Shirazi & Som, 2011:77).

The competitiveness of a tourism destination such the Kruger National Park is measured against the performance of multiple park functions. Therefore, the focus should be based on the three pillars of park management, namely general, ecotourism, and conservation management (Saayman, 2009: 358; Scott & Lodge, 1985:6). The focus of each pillar is linked and based on the park's main policy of protecting and conserving the natural and cultural heritage of the Park. Chen *et al.* (2011:260) indicate that a tourism destination's specific, unique characteristics and attributes play the most important part in the development of a competitive advantage.

Figure 1 provides an overview of park management which consists of internal and external factors which should be implemented, monitored and evaluated. Internal factors refer to aspects that park management can control. On the other hand, external factors include all aspects that park management has no control over. Both these factors affect the competitive advantage of the park (Hsu *et al.* 2009:290; Ritchie & Crouch, 2003:68; SANParks, 2014:internet; Van Raaij, 1986:1). Nonetheless, park management should consider the external factors and incorporate them into the management function in order to develop the whole park as a competitive destination based on the changing demands of tourists (Haider & Rein, 1993:75; Hsu *et al.* 2009:290; Kotler *et al.* 2004:623). If aspects such as reputation, information, intelligence, vision, financial assets, well-trained and skilled personnel are implemented, it may have a positive effect on the park's internal performance (Buhalis, 2000:99; Mihalic, 2000:77; Poon, 2003:140). Competitive advantage factors could also be determined by the identification of risks as it forms part of the managerial function. Risk identification could increase the competitive advantage of the park (Shaw *et al.* 2012:191). The implementation, constant monitoring and evaluation of the competitive advantage factors will then contribute to the successful positioning of the park to have the competitive advantage above its peers (Ritchie & Crouch, 2003:166; Thompson & Martin, 2010:197; Wood, 2004:151). Therefore, the attraction and natural resources are considered to be fundamental characteristics of the park which influences the competitive advantage of the park (Chen *et al.* 2011:249). Ritchie

and Crouch (2003:107-108) emphasise that satisfying the needs and expectations of tourists will improve any destination's competitive position.

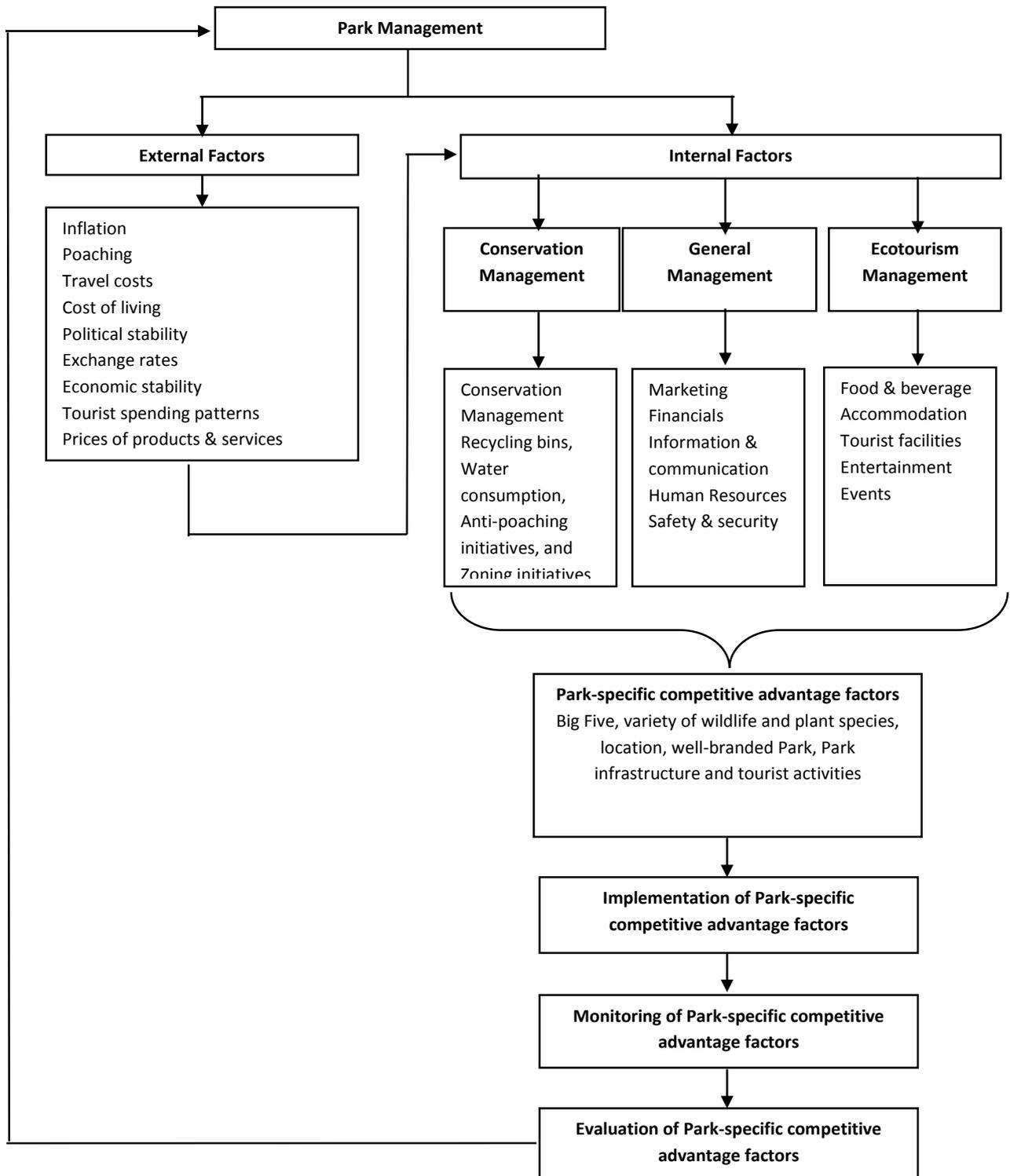


Figure 1: Conceptual framework for park management

Sources: Buhalis (2000:98); Chen et al. (2011:250); Cracolici and Njikamp (2008:336); Dwyer *et al.* (2002:40); Forsyth and Dwyer (2009:78); Hassan (2000:240); Heath (2003:7); Hsu *et al.* (2009:290); Ma (1999:259&261); Mazanec *et al.* (2007:46); Mihalic (2000:77); Myburgh & Saayman (2002); Poon (2003:140); Ritchie and Crouch (2003:76); SANParks (2013:internet); Thompson and Martin (2010:136); Van Raaij, (1986:1).

Unfortunately, up to date, very little research has been done on competitiveness within nature-based tourism destinations like national parks or ways in which a competitive advantage can be obtained. This lack of research will be highlighted through the discussion on literature in the next section.

Previous research regarding competitiveness within a nature-based context

Table 2 summarises previous research on competitiveness within the nature-based setting.

Table 2: Previous research on competitiveness in national parks

Author(s)	Study title	Competitive aspects
Taplin (2012)	Competitive importance-performance analysis of an Australian wildlife park	<ol style="list-style-type: none"> 1. Places to sit and rest; 2. Availability of toilets; 3. Quality food and beverages for sale; 4. Well-maintained facilities; 5. Cleanliness of premises; 6. Signposts for directions throughout the venue; 7. Information concerning attractions at the venue; 8. Knowledgeable staff; 9. Friendliness of staff; 10. Value for money; 11. Venue is good for the price paid; 12. Educational experiences; 13. Unique experiences; 14. Having a rest; 15. Spending time with friends/family; 16. Seeing wildlife/birds/plants; and 17. Enjoying nature.
Shirazi and Som (2011)	Destination management and relationship marketing: two major factors to achieve competitive advantage	<ol style="list-style-type: none"> 1. Infrastructure investments; 2. Strategic planning to market ties; 3. Maintaining resources; 4. Monitoring resource allocation; 5. Growth and development; 6. Operational performance effectiveness; and 7. Facilitating resources created.

Crouch (2010)	Destination competitiveness: an analysis of determinant attributes.	<ol style="list-style-type: none"> 1. Core resources and attractors; 2. Supporting factors and resources; 3. Destination policy, planning and development; 4. Destination management; and 5. Qualifying and amplifying determinants.
Kozak et al. (2009)	Measuring destination competitiveness: multiple destinations versus multiple nationalities	<ol style="list-style-type: none"> 1. Availability of facilities and activities; 2. Cultural and natural attractiveness; 3. Quality of services; and 4. Quality of infrastructure.
Cracolici and Nijkamp (2008)	The attractiveness and competitiveness of tourist destinations: a study of Southern Italian regions	<ol style="list-style-type: none"> 1. Information and tourist services; 2. Cultural events; 3. Quality and variety of products in the shops; 4. Hotels and other accommodation; 5. Level of prices and living costs; and 6. Safety.
Gomezelj and Mihalic (2008)	Destination competitiveness – applying different models, the case of Slovenia	<ol style="list-style-type: none"> 1. Inherited resource; 2. Created resources; 3. Supporting factors; 4. Destination management; 5. Situational conditions; and 6. Demand conditions.
Claver-Cortes et al. (2007)	Competitiveness in mass tourism	<ol style="list-style-type: none"> 1. Tangible resource management strategy; 2. Improvement and hotel dimension strategy; 3. Specialisation and intangible resource management strategy, and 4. Distribution strategy.
Haarhoff (2007)	An analysis of the price competitiveness of South Africa as an international tourist destination	International tourists travelling to South Africa will spend most of their money on products or travel components such as international flights, accommodation, attractions and food and beverages. The study furthermore indicated that the products and services such as accommodation, air transport, and attractions are much more expensive than anticipated by international tourists. Five-star accommodation establishments were found to be too expensive and other establishments were perceived to offer affordable prices. The paid attractions visited, with the exception of the Kruger National Park, were all marked as fairly priced.

Enright & Newton (2004)	Tourism destination competitiveness: a quantitative approach	<ol style="list-style-type: none"> 1. Safety; 2. Cuisine; 3. Dedicated tourism attractions; 4. Visual appeal; 5. Well-known landmarks; 6. Nightlife; 7. Different culture; 8. Special events; 9. Interesting festivals; 10. Local way of life; 11. Interesting architecture; 12. Climate; 13. Notable history; 14. Museums and galleries; 15. Music and performances.
Du Plessis (2002)	Competitiveness of South Africa as a tourist destination	<ol style="list-style-type: none"> 1. Safety; 2. Quality of service; 3. Value for money; 4. Geographical features; 5. Attitude towards tourists; 6. Availability of information; 7. Uniqueness of local people's lives; and 8. Foreign exchange.

Table 2 indicates the numerous competitive factors which are important for a destination to obtain a competitive advantage. These include safety, destination management, information and supporting infrastructure. Cracolici and Nijkamp (2008); Du Plessis (2002) as well as Enright and Newton (2004), identify safety as an overlapping competitive factor, showcasing the importance of tourist safety at tourism destinations. Crouch (2010); Enright and Newton (2004); Gomezelj and Mihalic (2008); Kozak *et al.* (2009); Shirazi and Som (2011) as well as Taplin (2012) also identify supporting infrastructure or the availability of infrastructure as a very important factor. In a South African context, Du Plessis (2002) provided eight factors (which do not include wildlife or natural scenery) which influence the competitiveness of South Africa as a tourist destination (see Table 2). Additionally Haarhof (2007) indicated that international tourists perceive the pricing of attractions (with the exception of the Kruger National Park and accommodation that excludes five-star establishments) as

competitive pricing structures which positions South Africa as a competitive market for international tourist. It is however clear that no previous research was conducted on national parks showcasing the competitive advantage factors regarded as important by tourists for these nature-based tourism destinations. A destination has a specific set of competitive factors, all of which are determined by internal and external variables, which might also be the case for national parks such as the Kruger National Park. Although some of these factors may be distinct in terms of a specific destination, some might overlap indicating that certain competitive advantage factors are generic.

Method of research

The method of research used will be discussed under the following headings: (i) the questionnaire, (ii) sampling method and survey, and the (iii) statistical analysis and results.

The questionnaire

The questionnaire used in the survey was based on research Claver-Cortes *et al.* (2007); Cracolici and Nijkamp (2008); Crouch (2010); Du Plessis (2002); Enright and Newton (2004); Gomezelj and Mihalic (2008); Kim *et al.* (2006); Kozak *et al.* (2009); Kruger and Saayman (2009:99); Lee and Sparks (2007:506); Luo and Deng (2007:399); Ritchie and Crouch (2003); Saayman and Saayman (2009b:5); Scholtz *et al.* (2013:2); Shirazi and Som (2011); Taplin (2012); Van der Merwe and Saayman (2008:158); and Wilkerson (2003:50) was divided into the following sections. Section A consisted of questions that captured the respondents' demographic and behavioural information such as age, home language, gender, income, province and country of residence, number of people in travelling group and when the decision was made to visit the park. Section B consisted of questions that was typically that of reasons for travelling; previous park visits, favourite holiday destination and whether the tourist would return to the Kruger National Park. Section C captured the competitive advantage factors for the Kruger National Park where 31 items were measured on a five-point Likert-scale of importance with 1 = not at all important; 2 = slightly important; 3 = important; 4 = very important and 5 = extremely important. Aspects such as Park-specific attributes, variety of products and services, conservation methods, greener management, service delivery, quality products and management were addressed.

Sampling method and survey

A quantitative research approach was followed and a probability sampling method was applied where all overnight tourists within the rest camps of the Kruger National Park were selected as participants for the survey. Only overnight visitors that were classified as tourist were asked to complete the questionnaire. For the purpose of this study, a tourist is defined as a person that travels to a destination, provides economic input to the local area other than where the person resides and works. Also, a tourist is someone that travels voluntarily to destinations or attractions away from his/her normal home for longer than 24 hours and less than a year (Keyser, 2009:62; Page & Connell, 2014:10; Saayman, 2013:5). Thus, the further reference to visitors or respondents in this study implies tourists. The survey was conducted at four rest camps in the Kruger National Park in which field workers was employed to distribute the questionnaires among the overnight respondents within the rest camps of Skukuza, Olifants, Lower Sabie and Berg-and-Dal. The survey was done between 18:00 and 20:00 at night in the rest camps when all visitors were either at their chalets or tents. Before each distribution session the fieldworkers were briefed on the purpose and importance of the research as well as how to approach and explain the questionnaire to the respondents. A total of 500 questionnaires were distributed at the various rest camps between the 27 December 2013 and 4 January 2014 of which the 436 obtained were included in further analysis. As shown in Table 3, the survey was conducted in the following rest camps: Olifants; Skukuza; Lower Sabie and Berg-en-Dal to determine the tourists views on the competitive advantage factors and motivational factors that influence tourist behaviour and could contribute to the Kruger National Park achieving competitiveness. Table 3 also shows the number of questionnaires administered at each rest camp.

Table 3: Questionnaires completed by visitors at the Kruger National Park during December 2013 and January 2014

Rest Camps	December 2013 & January 2014		
	Chalets	Campers	Total
Olifants	74	n/a	74
Skukuza	154	60	213
Lower Sabie	69	29	98
Berg-and-Dal	26	25	51
Grand Total			436

Source: Scholtz, Du Plessis and Saayman (2014:4)

The Olifants rest camp does not have camping facilities and therefore only respondents from chalets completed the questionnaire. Only one questionnaire was handed out per travelling group, which had an impact on the sampling size of the population. The total population was divided by the average group travel size which was 3.8 people per travel group and resulted in 305 584 tourist travelling groups (Scholtz *et al.*, 2014:14). According to the formula designed by Krejcie and Morgan (1970:607), a population (N) of 305 584 tourists to the Kruger National Park, with a 95% confidence level and 5% sampling error [d is expressed as (0.05)] resulted in a sample of 436 completed questionnaires to be collected. The number of completed questionnaires therefore encompasses the required number of questionnaires according to the requirement of Krejcie and Morgan (1970).

Statistical analysis and results

Since this research has to date not been done among South African national parks, an exploratory approach was followed. The pattern matrix of the principal axis factor analysis, using an Oblimin rotation with Kaiser Normalisation, identified five competitive advantage factors that were grouped together based on similar characteristics. All factors had comparatively high reliability coefficients, which ranges between 0.78 (the lowest) and 0.87 (the highest) (Brace *et al.* 2013:382; Malhotra, 2007:285; Zikmund *et al.* 2010:305-306). The average inter-item correlation proved that there is internal consistency between the factors with their values ranging from 0.37 to 0.53. The majority of the variables loaded higher than 0.3 on the factor analysis which clearly shows that there is a reasonably high correlation between the factors

and their component items. The eigenvalues of each factor must be greater than 1.0 in order to be retained and used in the data discussion. An eigenvalue is defined as the amount of variance associated with the factor (Malhotra, 2007:617; Zikmund *et al.* 2010:594). The sampling acceptability was measured with the Kaiser-Meyer-Olkin measure of 0.95. This ensured that the patterns of correlation are relatively compact and yield distinct and reliable factors (Field, 2013:684–685). The factors were all tested against Barlett’s test of sphericity, meaning that if a factor had a loading that is $p < 0.001$ it has a statistical significance which in turns supports Pallant’s (2007:197) factorability of the correlation matrix.

Table 4 indicates the variables and mean values of factors that have been identified as being competitive advantage factors for the Kruger National Park.

The factor scores were calculated as the average of all items contributing to a specific factor in order to be interpreted on the original 5-point Likert scale of measurement (1 = totally disagree, 2 = do not agree, 3 = neutral, 4 = agree, and 5 = totally agree). Consequently, the identified factors are discussed in more detail.

Table 4: Factors regarded as important for a competitive advantage for the Kruger National Park

Competitive Advantage Factor Analysis				
	Factor Loadings	Mean Value	Reliability coefficient	Average Inter- item correlation
Factor 1: Accommodation & Retail		4.05	0.79	0.50
The number and variety of rest camps.	0.66			
The variety in accommodation options that vary in price and style: from rustic to luxurious.	0.56			
A wide range of accommodation facilities.	0.44			
The availability of Park shops in the Kruger National Park rest camps offering tourists the necessary day-to-day essentials	0.38			
Factor 2: Wildlife Experiences		4.29	0.85	0.41
The Big 6 birding: Ground Hornbill, Kori Bustard, Lappet-faced Vulture, Martial	0.73			

Eagle, Pel's Fishing Owl and Saddle-billed Stork.				
The variety of endangered species such as wild dog, rhino and sable antelope that can be viewed in the park.	0.69			
The variety of fauna and flora species.	0.67			
The presence of the Big 5.	0.57			
One of the richest biodiversity of any national park.	0.55			
The variety of trees including the Baobab, Fever Tree, Knob Thorn, Marula and Mopane.	0.53			
The ideal game viewing in the park.	0.49			
Northern and Southern regions which offer a different wildlife and biome experience for the tourist	0.46			
Factor 3: Suprastructure & Amenities				
		3.79	0.78	0.42
Its high quality conference facilities on offer.	0.59			
The park's rich cultural heritage.	0.43			
The implementation of green initiatives in the parks rest camps such as recycle bins and solar panels.	0.42			
The fact that the park is in its 115 th year of existence (one of the oldest national parks).	0.40			
Its universal accessibility facilities (disabled friendly).	0.35			
Factor 4: Marketing & Branding				
		4.18	0.87	0.53
The parks' world-renowned image and reputation.	0.83			
Its status as the flagship park of South Africa National Parks.	0.80			
It being a well-branded tourist destination.	0.70			
Its status as one of the largest national parks in Africa.	0.52			
The massive expanse of the Kruger National Park.	0.36			

The variety of activities such as guided hiking tours, guided game drives, self-drives, 4x4 routes and bush walks.	0.27			
Factor 5: Visitor Management				
		3.76	0.84	0.37
Well maintained national park infrastructure, such as roads and picnic sites.	0.63			
The well-maintained and updated information boards at the rest camps.	0.58			
Easy access for different types of vehicles.	0.53			
The well-designed interpretation centres at the rest camps.	0.45			
The Kruger National Park is a leader in conservation methods and strategies.	0.43			
The well-designed wilderness and 4x4 trails.	0.37			
Well-designed routes and layout of the Kruger National Park.	0.33			
The management of tourist numbers during peak seasons.	0.30			

Factor 1: Accommodation and Retail

The number and variety of rest camps, the variety in accommodation options, a wide range of accommodation and the availability of Park shops in the rest camps are all items categorised under Factor 1 and therefore labelled *Accommodation and Retail*. *Accommodation and Retail* was considered to be the third most important factor contributing towards a competitive advantage for the Kruger National Park. This factor obtained a mean value of 4.05, a reliability coefficient of 0.79 and an average inter-item correlation of 0.50.

Factor 2: Wildlife Experiences

Wildlife Experience was considered to be the most important factor that contributes towards the Kruger National Park establishing a competitive advantage. This factor comprises of variables such as the Big 5; Big 6 birds; number of endangered species; variety of fauna and flora; one of the richest biodiversity of any national park; and the ideal game viewing in the Park. The mean value was 4.29, with a reliability coefficient of 0.85 and an inter-item correlation of 0.41.

Factor 3: Suprastructure and Amenities

Suprastructure and Amenities was rated the fourth most important competitive advantage factor and obtained a mean value of 3.79, a reliability coefficient of 0.78 and an average inter-item correlation of 0.42. *Suprastructure and Amenities* (Factor 3) included the Park's high quality conference facilities on offer; its rich cultural heritage; the implementation of green initiatives in the Park's rest camps such as recycle bins and solar panels; the 115th year of existence (one of the oldest national parks); and its universal accessibility facilities (disabled friendly).

Factor 4: Marketing and Branding

Marketing and Branding was regarded as the second most important factor that may contribute to the Kruger National Park obtaining a competitive advantage over its peers. The *Marketing and Branding* factor obtained a mean value of 4.18, a reliability coefficient of 0.87 and an average inter-item correlation of 0.71. Factor 4 was labelled *Marketing and Branding* and comprises the following aspects, namely the Parks' world-renowned image and reputation; its status as flagship of SANParks; well-branded tourist destination; its status as one of the largest national parks in Africa; the massive expanse of the Kruger National Park; and the variety of activities in the park.

Factor 5: Visitor Management

This factor is regarded as the fifth most important factor which the Kruger National Park can apply to obtain a competitive advantage. The *Visitor Management* factor obtained a mean value of 3.76, a reliability coefficient of 0.84 and an average inter-item correlation of 0.37. *Visitor Management* (Factor 5) comprises the following variables, namely well-maintained national park infrastructure such as roads and picnic sites; well maintained and updated information boards at the rest camps; easy access for different types of vehicles; well-designed interpretation centres at the rest camps; Kruger National Park as a leader in conservation methods and strategies; well-designed wilderness and 4x4 trails; well-designed routes and layout of the park.

Findings and implications

The findings of this research are as follows: Firstly, the results confirm that the type and nature of the destination (in this case a national park) greatly influences the competitive advantage factors visitors' regard as important. This implies that the

characteristics of the destination needs to be considered when addressing its competitive advantage (Crouch, 2011; Hong, 2008:33; Mihalic, 2000:77). Therefore the majority of products and services presented by the national park should be unique and park specific to enhance the competitiveness position as a tourism destination. Secondly, previously research conducted by Claver-Cortes, Molina-Azorin, and Pereira-Moliner (2007); Cracolici and Nijkamp (2008); Du Plessis (2002); Gomezelj and Mihalic (2008); Haarhoff (2007); Kozak *et al.* (2009); Shirazi and Som (2011) and Taplin (2012) focused on the competitiveness of a tourism destination and was not specific to national parks particularly that of South Africa. Therefore it can be argued that the particular combination of competitive advantage factors found in this research has not been identified in previous research that is specific to national parks. This finding can also be ascribed to the type and nature of the Kruger National Park and the fact that little research in this area has been conducted among national parks. These factors can therefore be regarded as distinct and especially important in gaining a competitive advantage for national parks. This finding emphasises that there are no universal set of competitive advantage factors for destinations and that each set of factors are destination specific. However, there might be similarities among destinations competitive advantage factors, but the level of importance will be destination specific. It is thus important for national parks across South Africa and the globe to identify their distinct park specific attributes, products and services that could allow them to become a competitive tourism destination to increase tourist numbers and park revenue to remain sustainable and self-sufficient.

Thirdly, five competitive advantage factors were identified (in order of importance): *Wildlife Experiences, Marketing and Branding, Accommodation and Retail, Visitor Management* and *Suprastructure and Amenities*. As discussed in the literature review, previous research indicated that factors such as *Wildlife Experience* are also an important factor that management of Kruger National Park should take into consideration when managing the visitor experience in the park (Engelbrecht, 2011:50). The factor *Wildlife Experiences* is significant to this study, as it has not yet been identified by any author before and it is specific to national parks in terms of competitive advantage factors. It is evident that the competitive advantage factors are similar to that of other tourism competitive advantage destination studies. However, the difference between destinations is based on the unique and specific product or

service being offered, which in the case of the Kruger National Park, is the *Wildlife Experience*. It is therefore evident that continuous research on the competitive advantage factors from a demand side (tourist view) is extremely important in staying competitive since in the event of management not monitoring and evaluating these factors on a regular basis, it may influence the park negatively. Accommodation was regarded as less important factors when managing the visitor experience at both national parks (Engelbrecht, 2011:52) and arts festivals (Erasmus, 2011:77), however it remains a key competitive advantage factor for national parks (Kruger, Scholtz & Saayman, 2013:49). This confirms the importance of have quality well designed *accommodation and retail* outlets within national parks as it influences the tourists perception on the competitiveness of the destination. *Suprastructure and Amenities* are important for maintenance; marketing and destination management are key to determining the competitive advantage of a destination. *Suprastructure and Amenities* forms the foundation of any tourism destination and therefore should be regarded as an important managerial aspect to be covered and obtain a competitive advantage as this supports the destinations image (Ritchie & Crouch, 2003:130). Park management will have to focus on the improvement of the parks' infrastructure and maintaining it accordingly in order to obtain a competitive advantage. According to Beerli and Martin (2004:623) as well as Ritchie and Crouch (2003:188-189) the way in which a tourism destination is being marketed and branded influences the level of competitiveness. The Kruger National Park should therefore ensure that the *Marketing and Branding* of the park is being managed from a strategic point of view so that a competitive advantage can be obtained. As a national park relies on tourism activities to generate income, the *Visitor Management* at the park should be of exceptional high quality in servicing the tourist in their needs (Ritchie and Crouch, 2003:139). Kruger National Park management should therefore look at ways to improve employee skills and experience through the offering of training programmes focusing on *Visitor Management*.

Based on the findings, the following recommendations are made:

This research identified *Wildlife Experiences* as the most important competitive advantage factor for a national park such as the Kruger National Park. This furthermore emphasises the important relationship that there is between conservation and tourism within a national park setting. *Wildlife Experiences* is an external factor

that Kruger National Park management have not control over. However, park management can ensure that visitors *Wildlife Experiences* are memorable through the optimal management of the game drives; interactive activities, interpretation centres; park specific information leaflets and brochures; information boards of wildlife sightings and discussions on the parks' wildlife. As wildlife forms part of the main aims of South African National Parks, and in this case the Kruger National Park, management should ensure that the wildlife, conservation and interactions are managed accordingly. The park could increase its *Wildlife Experiences* by improving tourist activities and developing new activities that increases the tourist chances of interaction with wildlife. Tourism within national parks is based on the natural environment at determines the success of the park as a tourism destination. This can be supported with wildlife educational tours, game drives and walks, and information centres, so that tourist awareness of the importance of nature conservation can be improved as well. Kruger National Park management should remember that the tourist experience at the park is directly linked to the wildlife experiences and then the secondary tourism aspects. Therefore, improved efforts by park management to ensure wildlife numbers are well managed, increased look-out points for wildlife viewing, updated animal movement information at rest camps and current happenings in the park with regards to wildlife numbers and interesting facts are all ways in which tourists' *Wildlife Experiences* can be satisfied. Lastly, the Kruger National Park should use the *Wildlife Experience* factor in its marketing and branding (which is also the second most important competitive advantage factor) to promote the park to tourists and showcasing the significant *Wildlife Experiences* that can be experienced when visiting the Park.

Marketing (as a whole) and *Branding* is a vital component of general management at the Kruger National Park and was identified as the second most important competitive advantage factor. The Kruger National Park's general management team must therefore ensure that quality promotions are being developed and positive word-of-mouth is being practised. This can all be done through determining the quality of the promotional items used in marketing campaigns and the level of service quality in the Park. The Kruger National Park should brand itself and market the Park as a brand that offers various wildlife experiences, interactive activities for all ages; an all-in-one destination and superior products and services are on offer at the Park. To increase

the Kruger National Park as a standalone brand, memorabilia and clothing should be well designed and portray the wildlife experience on offer. The Park should furthermore capitalise on social media such as Facebook, Twitter, Instagram, LinkedIn and YouTube to name a few and market the park to the younger generation. Tourists loyalty towards the Park could be increased through the marketing of special break-always and activities for tourists travelling with children during holiday season, and vice versa in low season as well as promoting the benefits of the Wildcard (loyalty programme). Furthermore the Park should focus on their park specific attributes that gives them a competitive advantage and continuously evaluate and improve on these attributes.

Accommodation and Retail was identified as an important contributor to the competitiveness of the Kruger National park. *Accommodation and Retail* are primary tourism aspects, however in the sense of a national park, tourist regard it as secondary aspects when visiting a national park. The Kruger national could increase accommodation occupancy through the upgrade of the current chalets so that it is more modern but still reflects the rustic natural and cultural aesthetic feel. Transforming chalets into becoming greener facilities the park could implement solar panels for electricity generation; increase recycling methods through awareness campaigns in chalets; recycling bins and using of bio-degradable chemicals for cleaning purposes in the Park and its rest camps. The park usage of gas for electrical appliances such as fridges, stoves and geysers could also have the becoming a greener destination and minimising expenses. Camp sites could be upgraded so that each campsite has its own electricity point that could be powered by solar panels for essentials such as fridges and lights. The park should also clearly mark the stands in the camp site, so that optimal occupancy can be managed and tourist restricted to specific areas when camping and not waste space. The park should ensure that camping ablution facilities are always in service and clean, as this as emerged as a problem among campers in some sites.

Suprastructures and Amenities was identified as another important competitive advantage factor. Kruger National Park management should ensure that the *Suprastructures and Amenities* within the park are suitably built and developed to minimise the possibility of negative impact on the environment. Roads (tar and gravel)

especially gravel roads should be maintained especially after heavy rains in the park. General maintenance of all *Suprastructures and Amenities* such as look-out points; picnic sites and reception offices in the park should be conducted. Regular painting, upgrading, cleaning of ablution facilities and the availability of essential products at the retail stores are important to ensure proper maintenance of *Suprastructures and Amenities*. The retail stores should ensure that essentials products are always available for tourist in the park. Park management have to remember that the exterior of supra- and infrastructure are up to standard.

Visitor Management was identified as an important ecotourism aspect to ensure the competitive advantage of the Kruger National Park. It is crucial that the Park employees are at all times helpful, friendly and courteous to tourists in the Park. Park management should ensure that employees are well-educated, skilled and knowledgeable about the Park as a whole to improve the visitor experience whilst visiting the park. This is a human resource function and proper training and development courses should be developed in collaboration with tertiary institutions and presented to the employees of the park. It remains critical that continuous research is done to determine the tourists profile, motivations and behavioural characteristics. Since the majority of tourists are well-educated, the implementation of interesting educational activities for adults, children and families at the rest camps as well as when they self-drive, could further educate tourists about nature, national parks and the importance of conservation as a priority. This emphasises the fact that employees should undergo continuous training and development courses to keep updated with changes in the industry. Implementing a mobile device application could address the latter and increase tourist experience and increase the parks competitive advantage.

Conclusion

The aim of this research was to identify the competitive advantage factors as perceived by tourist visiting the Kruger National Park, in becoming a competitive tourism destination. It is clear that the Kruger National Park should investigate which products and services are unique and specific to the Park. These park specific products and services should be converted into competitive advantage factors that are managed in such a manner that park revenue can increase; attracting more tourists

and ensure profitable and sustainable management of the Kruger National Park. Competitive advantage factors among tourism destinations especially nature-based tourism destinations will differ and therefore each park should identify their own competitive advantage factors and manage it accordingly. This study affirms that a national parks most important competitive advantage factor is that of *Wildlife Experiences* and national parks should focus on that as their main competitive advantage factor in marketing and promoting the destination. Future research can be focused on the standardisation of the questionnaire and implement the research within national parks across South Africa as well as Southern Africa. This would highlight the important differences that exists in between the motivational and competitive advantage factors among national parks in Africa. The focus of competitiveness among tourism destinations offering adventure activities could also be done as this is one of the fastest growing sectors within the tourism industry. Lastly, future research can be done through a comparison among the three biggest national parks in South Africa or even Southern Africa to identify their respective competitive advantage factors.

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