

11. MARKET OVERVIEW

11.1 SOUTH AFRICAN NATIONAL PARK TOURISM

SANParks accounts for the largest single segment of the South African tourism industry. With over 5,200 beds and 1,000 campsites under its control, SANParks is by far the largest single supplier of tourist accommodation in the country accounting for 24% of all nature based tourism in South Africa and receives 5.576 million visitors to the parks per year (as per 2014/2015 figures).

The following gives an overview of visitors per park. The figures are not recent but there was no major changes to these figures in the last year:

PARK	GUESTS TO PARK April 2014 - March 2015
Addo	204 881
Augrabies	69 990
GRNP - Tsitsikamma	376 458
Karoo	38 618
Kgalagadi	40 086
Kruger	1 659 793
Mountain Zebra	24 426
Table Mountain	2 676 051
Other Parks	486 513
Total 2014/15	5 576 816

From 2013/2014 to 2014/2015 there has been a 6.5% increase in visitation to National Parks.

The Kruger National Park accounts for about 70% of the total bed-nights sold in SANParks and 30% of total guests to Parks. Table Mountain is the most visited park and accounts for about 48% of all visitors to National Parks.

11.2 PARK SPECIFIC INFORMATION

11.2.1 Kruger National Park

The world-renowned Kruger National Park offers a wildlife experience that ranks with the best in Africa. Established in 1898 to protect the wildlife of the South African Lowveld, this National Park of nearly 2 million hectares, SANParks - Kruger National Park is unrivalled in the diversity of its life forms and a world leader in advanced environmental management techniques and policies. Truly the flagship of the South African National Parks, Kruger is home to an impressive number of species: 336 trees, 49 fish, 34 amphibians, 114 reptiles, 507 birds and 147 mammals. Man's interaction with the Lowveld environment over many centuries - from bushman rock paintings to majestic archaeological sites like Masorini and Thulamela - is very evident in the Kruger National Park. These treasures represent the cultures, persons and events that played a role in the history of the Kruger National Park and are conserved along with the park's natural assets.

GUEST DEMOGRAPHICS YEAR ENDED 31 MARCH 2015

TOTAL GUESTS TO PARK (GUESTS THROUGH GATES)	1 659 748
---	-----------

COMPOSITION		
RESIDENCE STATUS	NUMBER	% of total
SA RESIDENT	1,266,620	76.31%
SADC NATIONAL	32,121	1.94%
INTERNATIONAL (EXC SADC)	361,007	21.75%
TOTAL	1 659 748	100.0%

RACE PROFILE / DAY VS OVERNIGHT			
GROUPING		NUMBER	% of total
BLACK	DAY	356,710	28.16%

	OVERNIGHT	22,095	1.74%
	TOTAL	378,805	29.91%
WHITE	DAY	644,775	50.91%
	OVERNIGHT	243,029	19.19%
	TOTAL	887,804	70.09%
TOTAL DAY		1,001,485	79.07%
TOTAL OVERNIGHT		265,124	20.93%
GRAND TOTAL		1,266,609	100.00%

PROVINCE		NUMBER	% of total
EASTERN CAPE		13,916	1.10%
FREE STATE		16,848	1.33%
GAUTENG		424,332	33.50%
KWAZULU NATAL		35,821	2.83%
LIMPOPO		259,199	20.46%
MPUMALANGA		396,945	31.34%
NORTH WEST		17,963	1.42%
NORTHERN CAPE		1,851	0.15%
WESTERN CAPE		99,745	7.87%
TOTAL		1,266,620	100.00%
TOP 3	NUMBER 1	GAUTENG	
	NUMBER 2	MPUMALANGA	
	NUMBER 3	LIMPOPO	

INTERNATIONAL GUESTS (NON SA RESIDENTS)		NUMBER	% of total
SADC NATIONALS			
ANGOLA		485	0.12%
BOTSWANA		229	0.06%
CONGO (DEM. REP. OF)		133	0.03%
LESOTHO		154	0.04%
MALAWI		192	0.05%
MAURITIUS		856	0.22%
MOCAMBIQUE		25,884	6.58%
NAMIBIA		505	0.13%
SWAZILAND		1,954	0.50%

TANZANIA	97	0.02%
ZAMBIA	177	0.05%
ZIMBABWE	1,455	0.37%
INTERNATIONAL		
AFGHANISTAN	11	0.00%
ALAND ISLANDS	5	0.00%
ALBANIA	4	0.00%
ALGERIA	22	0.01%
AMERICAN SAMOA	483	0.12%
ANDORRA	2	0.00%
ANTARCTICA	6	0.00%
ARGENTINA	711	0.18%
ARMENIA	18	0.00%
ARUBA	39	0.01%
AUSTRALIA	13,424	3.41%
AUSTRIA	1,015	0.26%
BAHAMAS	3	0.00%
BAHRAIN	4	0.00%
BANGLADESH	36	0.01%
BARBADOS	8	0.00%
BELARUS	407	0.10%
BELGIUM	5,424	1.38%
BELIZE	1	0.00%
BENIN	5	0.00%
BERMUDA	17	0.00%
BOLIVIA	82	0.02%
BOSNIA & HERZEGOVINA	3	0.00%
BOUVET ISLAND	10	0.00%
BRAZIL	3,212	0.82%
BRITISH INDIAN OCEAN TERRITORY	1,536	0.39%
BRUNEI DARUSSALAM	7	0.00%
BULGARIA	81	0.02%
BURKINA FASO	4	0.00%
BURUNDI	0	0.00%
CAMBODIA	120	0.03%
CAMEROON	28	0.01%
CANADA	6,084	1.55%

CAPE VERDE	0	0.00%
CARIBBEAN	3	0.00%
CAYMAN ISLANDS	3	0.00%
CENTRAL AFRICAN REPUBLIC	31	0.01%
CHAD	101	0.03%
CHILE	639	0.16%
CHINA	2,688	0.68%
CHRISTMAS ISLAND	3	0.00%
COLOMBIA	182	0.05%
COMOROS	1	0.00%
CONGO (BRAZZAVILLE)	5	0.00%
COSTA RICA	15	0.00%
CROATIA	12	0.00%
CUBA	15	0.00%
CURAÇAO	5	0.00%
CYPRUS	30	0.01%
CZECH REPUBLIC	646	0.16%
DENMARK	5,632	1.43%
DJIBOUTI	4	0.00%
DOMINICA	2	0.00%
DOMINICAN REPUBLIC	60	0.02%
DUBAI	210	0.05%
ECUADOR	277	0.07%
EGYPT	127	0.03%
EL SALVADOR	5	0.00%
EQUATORIAL GUINEA	12	0.00%
ERITREA	16	0.00%
ESTONIA	154	0.04%
ETHIOPIA	35	0.01%
FALKLAND ISLANDS (MALVINAS)	349	0.09%
FAROE ISLANDS	10	0.00%
FIJI	9	0.00%
FINLAND	698	0.18%
FRANCE	46,525	11.83%
FRENCH GUIANA	651	0.17%
FRENCH POLYNESIA	6	0.00%
GABON	1,666	0.42%
GAMBIA	12	0.00%

GAZA	1	0.00%
GEORGIA	3,936	1.00%
GERMANY	106,262	27.03%
GHANA	233	0.06%
GIBRALTAR	5	0.00%
GREECE	485	0.12%
GREENLAND	34	0.01%
GRENADA	2	0.00%
GUADELOUPE	9	0.00%
GUATEMALA	7	0.00%
GUINEA-BISSAU	18	0.00%
HAITI	109	0.03%
HEARD ISLAND AND MCDONALD ISLANDS	63	0.02%
HOLY SEE (VATICAN CITY STATE)	182	0.05%
HONDURAS	12	0.00%
HONG KONG	178	0.05%
HUNGARY	231	0.06%
ICELAND	360	0.09%
INDIA	3,858	0.98%
INDONESIA	112	0.03%
IRAN	249	0.06%
IRAQ	27	0.01%
IRELAND	649	0.17%
ISLE OF MAN	121	0.03%
ISRAEL	1,886	0.48%
ITALY	11,173	2.84%
IVORY COAST	22	0.01%
JAMAICA	47	0.01%
JAPAN	862	0.22%
JERSEY	0	0.00%
JORDAN	16	0.00%
KAZAKHSTAN	28	0.01%
KENYA	71	0.02%
KIRIBATI	9	0.00%
KOREA, NORTH	171	0.04%
KOREA, SOUTH	392	0.10%
KUWAIT	11	0.00%
KYRGYZSTAN	10	0.00%

LAOS	6	0.00%
LATVIA	18	0.00%
LEBANON	44	0.01%
LIBYA	1	0.00%
LIECHTENSTEIN	14	0.00%
LITHUANIA	21	0.01%
LUXEMBOURG	156	0.04%
MACAO	1	0.00%
MACEDONIA	0	0.00%
MADAGASCAR	403	0.10%
MALAYSIA	49	0.01%
MALTA	11	0.00%
MARSHALL ISLANDS	6	0.00%
MARTINIQUE	4	0.00%
MAURITANIA	5	0.00%
MAYOTTE	3	0.00%
MEXICO	233	0.06%
MOLDOVA	2	0.00%
MONACO	2	0.00%
MONGOLIA	4	0.00%
MONTENEGRO	6	0.00%
MOROCCO	68	0.02%
MYANMAR	7	0.00%
NEPAL	284	0.07%
NETHERLANDS	31,197	7.94%
NETHERLANDS ANTILLES	56	0.01%
NEW CALEDONIA	103	0.03%
NEW GUINEA	6	0.00%
NEW ZEALAND	1,353	0.34%
NICARAGUA	13	0.00%
NIGER	17	0.00%
NIGERIA	126	0.03%
NORFOLK ISLAND	128	0.03%
NORTHERN IRELAND	12	0.00%
NORTHERN MARIANA ISLANDS	4	0.00%
NORWAY	1,680	0.43%
OMAN	60	0.02%
PAKISTAN	254	0.06%

PALESTINE	32	0.01%
PANAMA	20	0.01%
PAPUA NEW GUINEA	1	0.00%
PARAGUAY	32	0.01%
PERU	54	0.01%
PHILIPPINES	56	0.01%
PITCAIRN	4	0.00%
POLAND	1,854	0.47%
PORTUGAL	5,917	1.51%
PUERTO RICO	35	0.01%
QATAR	16	0.00%
REUNION	242	0.06%
ROMANIA	153	0.04%
RUSSIAN FEDERATION	429	0.11%
RWANDA	0	0.00%
SAINT BARTHELEMY	17	0.00%
SAINT HELENA, ASCENSION AND TRISTAN DA CUNHA	0	0.00%
SAINT LUCIA	0	0.00%
SAO TOME AND PRINCIPE	5	0.00%
SAUDI ARABIA	77	0.02%
SCOTLAND	264	0.07%
SENEGAL	10	0.00%
SERBIA	9	0.00%
SEYCHELLES	141	0.04%
SIERRA LEONE	44	0.01%
SINGAPORE	325	0.08%
SINT MAARTEN	0	0.00%
SLOVAKIA	165	0.04%
SLOVENIA	50	0.01%
SOLOMON ISLANDS	9	0.00%
SOUTH AMERICA	46	0.01%
SOUTH GEORGIA AND THE SOUTH SANDWICH ISLANDS	17	0.00%
SPAIN	4,266	1.09%
SRI LANKA	67	0.02%
SUDAN	17	0.00%
SURINAME	3	0.00%
SVALBARD AND JAN MAYEN	6	0.00%
SWEDEN	4,555	1.16%

SWITZERLAND	6,116	1.56%
SYRIA	19	0.00%
TAIWAN	279	0.07%
THAILAND	116	0.03%
TIMOR-LESTE	5	0.00%
TRINIDAD AND TOBAGO	20	0.01%
TUNISIA	37	0.01%
TURKEY	203	0.05%
TUVALU	0	0.00%
UGANDA	608	0.15%
UKRAINE	682	0.17%
UNITED ARAB EMIRATES	945	0.24%
UNITED KINGDOM	38,008	9.67%
UNITED STATES	31,979	8.13%
UNITED STATES MINOR OUTLYING ISLANDS	117	0.03%
URUGUAY	117	0.03%
UZBEKISTAN	8	0.00%
VANUATU	24	0.01%
VENEZUELA	46	0.01%
VIETNAM	17	0.00%
WALLIS & FUTUNA	829	0.21%
WEST BANK	14	0.00%
WESTERN SAHARA	15	0.00%
YEMEN	16	0.00%
TOTAL INTERNATIONAL		393,128
		100.00%
TOP 5	NUMBER 1	GERMANY
	NUMBER 2	FRANCE
	NUMBER 3	UNITED KINGDOM
	NUMBER 4	UNITED STATES
	NUMBER 5	NETHERLANDS

11.3 PARK SPLIT – SOUTH VERSUS NORTH

As the Spa product is located in the south of the park it is important to look at the visitation split between north and south.

The unit occupancies for the main camps in the KNP are outlined below:

	UNIT NIGHTS SOLD	CAMPING SITE NIGHTS SOLD
South (Marula Region)	267,626 (69.8%)	44,574 (71.7%)
North (Nxanatseni Region)	115,943 (30.2%)	112,845 (28.3%)
Total:	383,569 (100%)	157,419 (100%)

In light of the above it is safe to assume that approximately 70% of all visitors to the KNP visits the south Total number of visitors to the park: 1,659,748

70% of 1,659,748: 1,161,823