



Customer Service Dimensions in State and Private Game Reserves in northern KwaZulu-Natal, South Africa

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Abstract

Northern KwaZulu-Natal, or Zululand, contains some of the oldest protected areas in South Africa. The first game reserves were proclaimed in 1894 and 1895 and have become an integral component of the tourism industry. In the tourism industry, service excellence is important for customers. The study investigates if there are differences in customer experiences of service in the state-run game reserves in the region compared to the neighbouring private game reserves. The internet provides new repositories of data for researchers, and a total of 6,799 online reviews by visitors to private game reserves were analysed and compared to 1,605 reviews by visitors to state-run game reserves. Of the private game reserves, 27% of the reviews were for visits to game reserves smaller than 1,400 hectares in area. A total of 832 reviews for three private lodges located within state-run game reserves were also analysed to determine if there was a significant difference. The research found that the three private lodges located within state-run game reserves achieved the highest customer satisfaction scores. State-run game reserves and rest camps received a customer satisfaction score of 72.8% for two criteria, but the small game reserves exceeding this rating and scored 85.5%. No statistically significant relationship was found between measures of customer satisfaction and the size of the private game reserves.

Keywords: SERVQUAL, Zululand game reserves, customer satisfaction, Eco-tourism, Service Tangibles, Service Reliability,

Introduction – Protected areas in northern KwaZulu-Natal

State-run protected areas (national parks and game- and nature- reserves) and privately-owned game reserves comprise an important component of the South African tourism industry. Of foreign tourists surveyed, 69% listed wildlife as a motivator for visiting KwaZulu-Natal (Ezemvelo KZN Wildlife, 2011:17). At present, state-run protected areas comprise 5.5%, or 6.7 million hectares, of the surface area of South Africa. Of this total, national parks account for 60% of the conservation estate, and forest reserves and game- and nature- reserves the remainder (Brett, 2010:7). In addition, it is estimated that 10,000 private game reserves and game farms comprise 16.8% of the land area of the country (Sanchez, 2015).

Some of the earliest protected areas in South Africa were proclaimed in what is now the northern region of the province of KwaZulu-Natal (Pringle, 1982:51, 114; Carruthers, 1985, 4). Beginning in 1894 and 1895, these initial protected areas were established to protect remnant herds of large mammals which were in imminent danger of extinction as a direct result of non-sustainable hunting by white settlers and hunters (MacKenzie, 1988:86, 116; Beinart & Coates, 1995:22, 29). As these early protected areas were established to protect “game”, and did not take into consideration the full array of ecological patterns and processes, they represent a retrospective gaze to the English deer park of the 12th century (Pringle, 1982, 51; Carruthers, 1988:252; MacKenzie, 1988:13; Miles, 2009:34). By the beginning of the 14th century, in England the protection of deer by the ruling elite had reached its zenith and as much as 20% of extant woodlands were set aside as deer parks (Miles, 2009:61). These deer parks existed for the sole enjoyment of the ruling elite, and the common people were not allowed to



hunt in these preserves. In Elizabethan times, a map was produced indicating the location of 700 deer parks, which were maintained for the exclusive use by the elite, and laws were passed which turned the hunting, or poaching, of game by the common people into a “political and near revolutionary act” (MacKenzie, 1988:16).

This elitist attitude to the preservation of only a limited selection of wildlife species would be replicated nearly four centuries later in the colonies of the Anglo world, and in particular in the African colonies (Stevenson-Hamilton, 1937:98; Pringle, 1982:86; MacKenzie, 1988:212, 229; Carruthers, 1997:127; Brett, 2010:4). The “deer park” approach to preservation was reincarnated in the early South African protected areas which, in sharp contrast to the experiment which began in the United States of America in 1872, were proclaimed mainly to protect large mammals such as black rhino, white rhino, hippo and eland.

Protection of large mammals was, therefore, the primary motivation for setting aside the first reserves in what is now KwaZulu-Natal, while in the Zuid-Afrikaansche Republiek (ZAR) the Sabi Game Reserve was gazetted to protect remnants of the once-abundant large fauna which had attracted hunters to the Lowveld (Stevenson-Hamilton, 1937:116; Pringle, 1982:50, 114; Beinart & Coates, 1995:29; Carruthers, 1995:25, 48; Carruthers, 1997, 125; Pooley & Player, 1995:105, 145, 324). Although this historic legacy is well supported in the literature, Carruthers (2013:463) has shown that, despite the obsession with the preservation of large mammals by early South African conservationists, in the Natal Colony a national park was established by the legislature in 1906. This national park protected a scenic portion of the Drakensberg, did not cover a large area and possessed no significant mammals or any known endangered mammal species. This proclamation was unusual for the time and out of step with accepted conservation practices, and was more closely aligned to the American conservation movement.

The 20th century history of the northern KwaZulu-Natal, or Zululand, game reserves, and opposition to the protection of any wildlife during the early decades of the 20th century, has been well documented and is not the particular focus of this paper (Pringle, 1982, 109-130; Pooley & Player, 1995, 125, 131, 186). In summary, despite opposition from many quarters, not only have the state-run game reserves prevailed for more than one century, and become an important component of the tourism industry, but in certain instances additional land has been set aside by government for conservation (Pooley & Player, 1995, 147, 305).

While the state-run game reserves successfully restored wildlife populations which had been reduced to small remnants, over the past five decades the majority of the commercial livestock farms in the region has been converted from cattle farming to game farming (Map 1). Initially, land-owners began to reintroduce wild animals to their properties that were made available by the provincial conservation agency (Natal Parks Board and now Ezemvelo KZN Wildlife), which became available as wildlife populations recovered. Surplus wild animals were captured using innovative game capture techniques which were perfected in the game reserves (Ezemvelo KZN Wildlife, 2011:11; Dugmore, 2013). As wild animals offered an alternate source of revenue, derived both from hunting and the sale of venison and dried meat (biltong), this income stream at first complemented income from extensive cattle farming (Oberem, 2015). However, since 1990 tourism has become an additional income stream on many of the properties (Pooley & Player, 1995:179). In northern KwaZulu-Natal there are at present more than 35 privately-owned lodges which complement the state-run accommodation offered by Ezemvelo KZN Wildlife in game reserves such as Hluhluwe-iMfolozi, Ndumo and the iSimangaliso Wetland Park and World Heritage Site. Other state-run protected areas, such as the Phongolo and Tembe Elephant reserves, do not currently have rest camps operated by the provincial conservation authority (Map 1).

The SERVQUAL service dimensions

Tourism is a service industry and a tertiary economic activity. In any service industry, the customer's expectations and experience of service are important considerations. Parasuraman, Zeithaml and Berry (1985) developed the well-known SERVQUAL model as an instrument for measuring customer expectations and experience of service. A total of 97 attributes were identified by the researchers, which affect a customer's rating of service received. The authors argue that customers assess the SERVQUAL dimensions at the time of purchase, and this is a continuous process with a number of feedback loops as a customer will re-assess the service level received every time a purchase is made. This re-assessment will take place even when satisfactory service has been received during a previous interaction between the supplier and the customer (Parasuraman, Zeithaml & Berry, 1985:48). The authors initially identified ten service dimensions and later reduced these to five, namely: Reliability, Assurance, Tangibles, Empathy and Responsiveness (Parasuraman, Zeithaml & Berry, 1988:23; Kulasin & Fortuny-Santos, 2005:35).

In the tourism industry, which is part of the tertiary sector of the economy, as the product being sold is intangible, service excellence is essential for the successful operation of the business (Kulasin & Fortuny-Santos, 2005:133). The five dimensions vary according to the economic sector examined, and in the tourism sector customers will rate certain dimensions as being more important than in sectors such as banking, insurance and higher education (Sachdev & Verma, 2004:104-112; Tengambwage, 2016:83; Brett & Sibiya, 2018:15).

Throughout the world, the tourism sector is becoming increasingly competitive. Customers can choose from a plethora of destinations, both locally and internationally, and internet sites such as TripAdvisor (www.tripadvisor.com) have made it increasingly easy to access both positive and negative reviews of a tourist destination (Aynalem, Birhanu, & Tesefay, 2016). This global increase in well-informed tourists also places increasing demands on tourism managers to maintain high levels of service (Tkalčič, 2014:68).

In the tourism sector, customers are purchasing a suite of experiences and memories which are created, partly, by the staff at each destination. Managers, therefore, need to ensure that staff are trained to demonstrate empathy, and that no unsympathetic responses are received by customers (Wang, 2008:52; Albayrak, Caber and Aksoy, 2010:141).

When a customer receives a level of service which is lower than the expected service level, the service will be rated as unsatisfactory, and when the service received exceeds the customer's expectations, the level of service will be rated as excellent (Parasuraman, Zeithaml and Berry, 1985:48). Perceptions of service quality are therefore based on a comparison of expectations measured against actual performance (Parasuraman, Zeithaml and Berry, 1988:15).

The five SERVQUAL service dimensions are summarised as follows (Arlen, 2008):

- **Tangibles** - The appearance of physical buildings and infrastructure, equipment, personnel uniforms, and communication materials.
- **Reliability** - The ability to perform the promised service reliably and accurately.
- **Responsiveness** - The willingness to help customers and provide prompt service.
- **Assurance** – The knowledge and courtesy of employees and their ability to convey trust and confidence
- **Empathy** – The caring and individualised attention employees provide their customers.

Parasuraman, Zeithaml and Berry (1985) identified four gaps in the service delivery process which affect the customer's perception of service quality (Kulasin and Fortuny-Santos, 2005:134). These four gaps then produce a fifth gap, a gap which occurs when

there is a measurable deficit between customer expectations and assessment of the standard of service received (Figure 1).

Gap Model of Service Quality

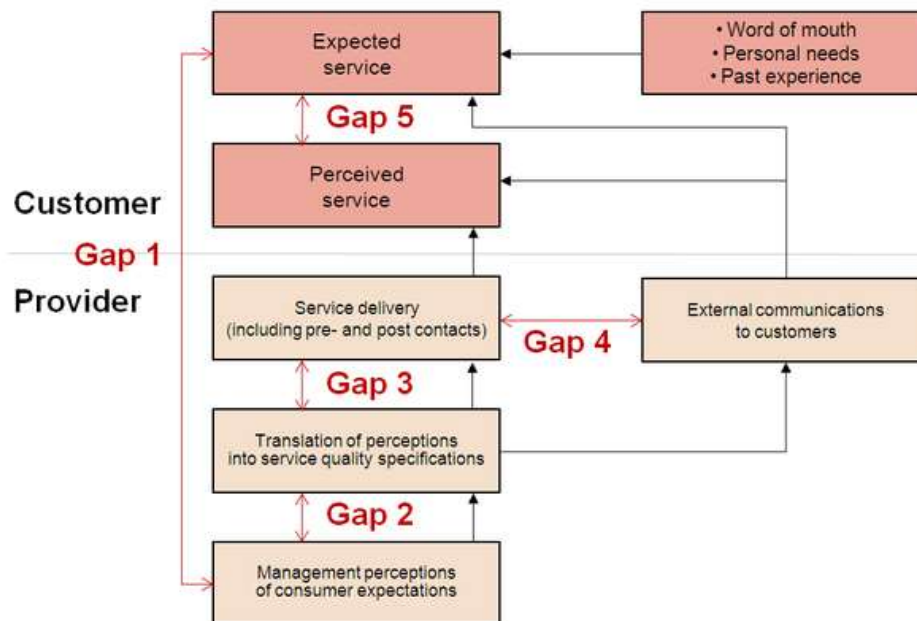


Figure 1: The five gaps in service delivery in the SERVQUAL model

Source: <https://avaremy.files.wordpress.com/2014/01/parasuaman-1985-servqual-gaps-model.png>

Parasuraman, Zeithaml and Berry tested the SERVQUAL model by conducting empirical research in five service sectors: retail banking, securities brokerage, credit card services, repair and maintenance of electrical appliances, and long-distance telephone services (Parasuraman, Zeithaml & Berry, 1988, 18). Since this initial research, the SERVQUAL model has been tested in a number of sectors, including banking, insurance, telecommunications, fast-food, a grocery store, a hair salon, health services and university education (Saleh & Ryan, 1991; Handrinis, Folinas & Ribeiro, 1993; Sachdev & Verma, 2004; Daniel & Berinyuy, 2010; Pena, da Silva, Tronchin & Melleiro, 2013; Temba, 2013; Brandt, 2014; Tegambwage, 2017). Brett and Sibiya (2018) examined customer assessments of service at a game reserve within the study area, and compared the results to some of the previous studies in other economic sectors.

If all economic sectors are considered, the cumulative research suggests that Service Reliability is the most important service dimension for customers, and the second most important dimension is Service Responsiveness (Arlen, 2008). The two least important service dimensions for customers, Service Empathy and Service Tangibles, received a combined score of 27% (Figure 2).

Brett and Sibiya (2018) examined customer reviews for a private game reserve in the study area, and allocated the service issues identified under the SERVQUAL service dimensions. The researchers concluded that in the example of the game reserve, the service dimension of Tangibles is vitally important because customers are purchasing an intangible product (Brett & Sibiya, 2018:9). The researchers state, "In tourism, the customer is accumulating a suite of memories based on the overall experience, as they interact with the facilities and experiences on offer" (Brett & Sibiya, 2018:16). It is important, therefore, that tourism managers should

pay careful attention to small details such as the appearance of gardens, swimming pool, buildings, interior decorations, staff uniforms, and the condition of accommodation units.

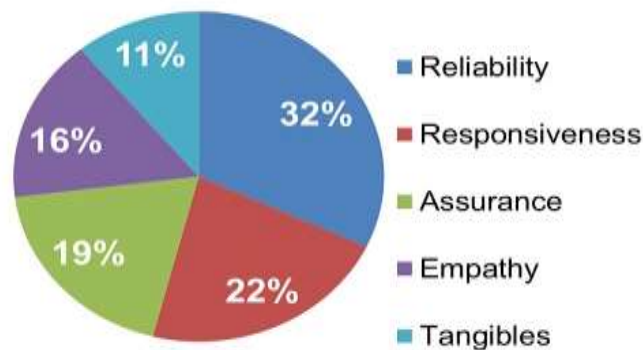


Figure 2: The five service dimensions and their relative importance to customers

Source: www.serviceperformance.com/the-5-service-dimensions-all-customers-care-about/

As is the case in the fast-food sector, Tangibles convey an immediate and lasting impression that will influence the customer's assessment of the tourist destination.

Methodology

This research builds on an earlier study by Brett and Sibiya (2018) which assessed the SERVQUAL dimensions at a private game reserve situated near the town of Hluhluwe. The advent of the internet, and access to social media sites, has made new repositories of data available to the researcher (Ellender, 2017; Phillips, 2017). The website TripAdvisor (www.tripadvisor.co.za) is a source of customer reviews for the tourism sector.

Evaluations of the state-run and private game reserves in northern KwaZulu-Natal were analysed and categorised to obtain data on customers' perceptions of each wildlife-related destination. Only quantified reviews posted on TripAdvisor were analysed and customers rate each experience on a 5-point Likert scale ranging from "excellent" to "terrible".

A total of 1,605 reviews which evaluated a visit to a state-run game reserve were accessed, compared to 6,799 reviews submitted by visitors to private game reserves. Of the total for the private game reserves, 27.4%, or 1,863 reviews, were posted by visitors to the smaller game reserves covering less than 1,400 ha in area, such as Emdoneni, Malala, Falaza and Ubizane (Figure 30, 31). In addition, there were 832 quantified reviews posted for three private lodges - Rhino Ridge, Royal Thonga and Tembe Lodge (Figures 22-25) - which are located within, or have direct access to, state-run game reserves. The new Mthembu Lodge, located near the southern boundary of Hluhluwe-iMfolozi Game Reserve opened at the end of 2018 and was not included in the research as too few reviews are available (Mantis Collection, 2017). A hypothesis that was tested was whether larger private game reserves are more successful in delivering service excellence than the small game reserves. The results were plotted on a scatter plot and Spearman's correlation was applied. The results are depicted on Figure 11.



Map 1: Location of state-run protected areas and private game reserves in northern KwaZulu-Natal
Source: Author's own

Results: Assessment by customers of visits to game reserves

A tourism product is a complex experience consisting of a process where tourists are making use of many travel services during the duration of a visit, including information, transportation, accommodation, and attraction services (Albayrak, Caber & Aksoy, 2010:140). One of the assumptions underpinning the development of the SERVQUAL model is the unique characteristics of services as compared to physical products. It may therefore be difficult to understand the customer's service requirements before the product is purchased. These unique characteristics may make it more difficult for a company to objectively assess its service quality level (Kaiser, 2012). This implies that an intangible product needs to be well defined by a tourism business if the owners are to understand service excellence as perceived by consumers (Arlen, 2008).

A total of 8,404 reviews from www.tripadvisor.co.za were therefore quantified to determine whether there is a difference in customer assessments of service received between the state-run game reserves and private game reserves in the region. Of the 34 private lodges analysed, for five lodges a rating of "terrible" (the worst score possible) was not recorded. However, for the state-run game reserves, only Ndumo Game Reserve did not receive a rating of "terrible" (Figure 5).

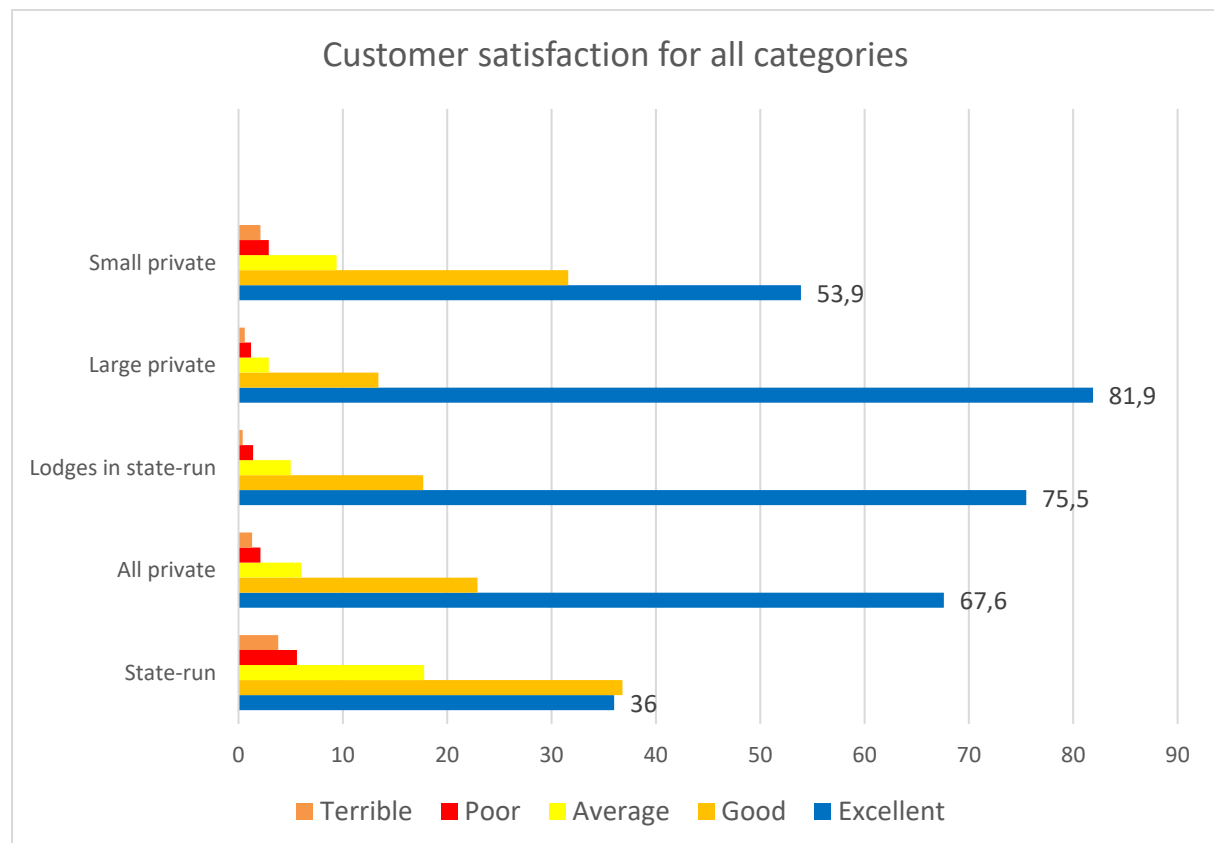


Figure 3: Combined service rating for state-run and private game reserves

As Figure 3 illustrates, customer ratings of "excellent" were highest in the three private lodges which are located within large state-run game reserves, or have direct access to these large game reserves (Map 1). The assumption was made that larger game reserves sustain larger populations of wildlife, and a more complete array of ecological patterns and processes, and therefore have greater appeal to tourists. If this is true, then larger game reserves will return higher customer satisfaction scores. This assumption was tested and is discussed later in the paper (Figure 11).

The contrast between customer ratings of “excellent” in the state-run game reserves and rest camps, compared to private game lodges is quite significant. For the state-run rest camps, the “excellent” and “good” ratings were recorded by 26.9% and 39.1% of respondents respectively. The “excellent” rating ranged from 18.4% for Mantuma camp, Mkhuze, to 41.8% for Mpila Camp in Hluhluwe-iMfolozi Game Reserve. Even the new, exclusive Nselweni Bush Lodge (Figure 16) only received an “excellent” score of 32%.

Hluhluwe-iMfolozi Game Reserve

This is the largest contiguous game reserve in KwaZulu-Natal, and also the oldest. Portions of the 96,453-hectare reserve were gazetted in 1895 by the Governor of Zululand to protect relic populations of white rhino and black rhino (Pringle, 1982:114). The original proclamation in Government Notice No. 12 of 1895 set aside two separate areas, Hluhluur Valley Reserve and Umfolozi Junction Reserve (Ezemvelo, 2011, 6). These two reserves comprised approximately 43% of the current game reserve. Hluhluwe-iMfolozi is well-known amongst eco-tourists for saving the southern white rhino (*Ceratotherium simum simum*) from certain extinction, and for the relocation of more than 4500 white rhino to national parks throughout Southern Africa (Player & Pooley, 1995:126; Ezemvelo KZN Wildlife, 2011, 4: Stuart, 2018, 92). Due to the presence in the first half of the 20th century of a tsetse-fly-borne cattle disease, there were calls from influential farmers to abolish the Zululand game reserves and to destroy all wild animals. In the iMfolozi section, and on surrounding state land, a total of 26,539 wild animals were shot between 1929 and 1930, and 70,332 were shot in a second campaign between 1942 and 1950 (Vincent, 1970, 39, 40; Pringle, 1982, 118, 129, 144, 146; Ezemvelo KZN Wildlife, 2011, 3).

Partly as a result of these hunting campaigns, and from half a century of unsustainable hunting, a number of species became locally extinct in Hluhluwe-iMfolozi including lion, cheetah, wild dog, giraffe, eland and elephant (Bourquin et al, 1971; Natal Parks Board, 1989:13, 15). The two most common antelope species, impala and nyala, were so rare in the early days that in 1936 they were introduced from Mkhuze (Bourquin et al, 1971:41, 42). With the exception of eland, the wildlife species which occurred historically have been successfully reintroduced and the game reserve now supports a large elephant population, and the second largest white rhino population in the world (Ezemvelo KZN Wildlife, 2011:10; Stuart, 2018:92). The Big Five species are all present as well as hippo, giraffe, zebra, warthog, baboon, cheetah, spotted hyaena, wild dog and 13 species of antelope, although declines of six antelope species have been observed over the past four decades (Bourquin et al, 1971:30-42; Ezemvelo KZN Wildlife, 2011:11).

There are three rest camps in the Hluhluwe-iMfolozi Game Reserve and five exclusive bush lodges, three entrance gates and a 229-kilometre road network (Ezemvelo KZN Wildlife, 2011,19). Hilltop, in the Hluhluwe section, is the largest and oldest rest camp in Zululand and can accommodate 174 visitors in chalets and rondavels (Figure 12 – 15). Mpila camp, in the iMfolozi section, can accommodate 100 visitors in chalets, cottages and safari tents (Figure 17) (Pooley & Player, 1995:126, 132). In the 2017/2018 financial year, occupancy rates in the camps averaged 71.7% (Ezemvelo KZN Wildlife, 2018, 74).

From Figure 4 it is clear that from the reviews posted, tourists are making a distinction between the appeal of the game reserve and the degree of service received at the rest camps. Hilltop received an “excellent” and “good” rating from 20.3% and 38.4% of respondents respectively. The smaller Mpila camp performed better and achieved an “excellent” score from 41.8% of respondents and a rating of “good” from 40.7% of respondents. In contrast, 60.2% and 30.3% of respondents awarded the game reserve an “excellent” and “good” rating respectively (Figure 4).

The new, state-of-the art Nselweni Bush Lodge achieved an “excellent” rating from only 32% of respondents. This is a surprisingly poor rating as this exclusive bush camp was opened in

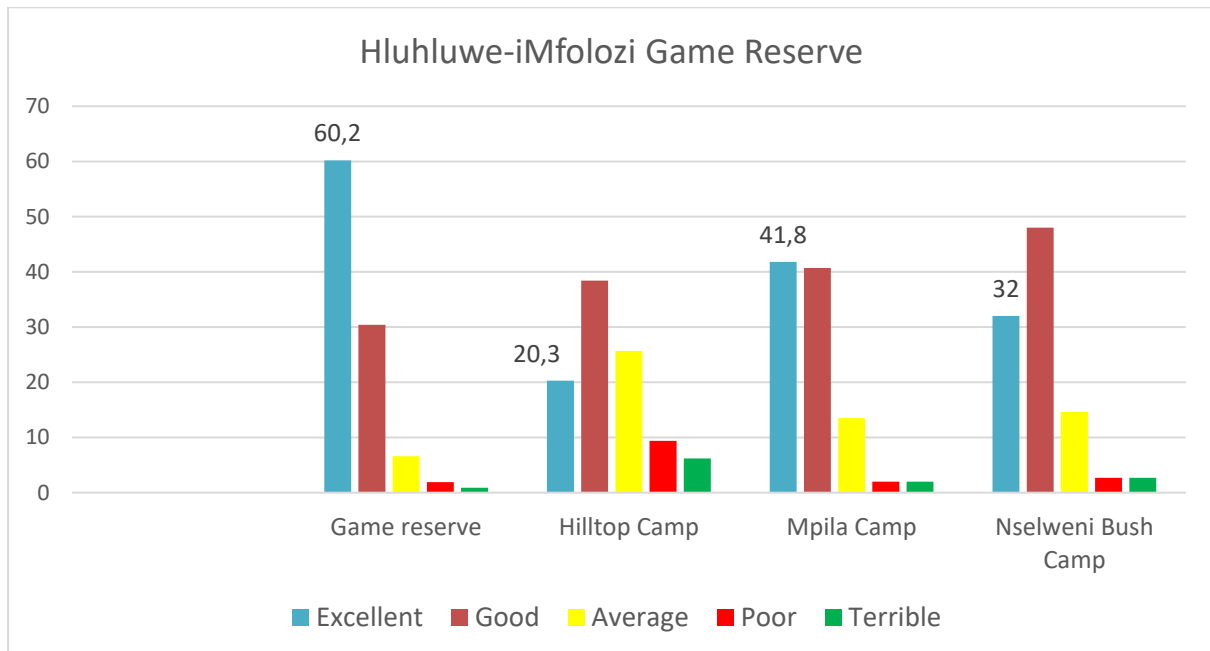


Figure 4: Customer service rating for the iMfolozi-Hluhluwe Game Reserve

2009 and occupies a prime site overlooking the Black Umfolozi River. The camp blends concrete and canvas in the design of the 10 units (Figure 16), it has a fully equipped conference venue decorated to the theme of Nguni cattle, and there is a high viewing platform overlooking the river. Of significant importance, from the perspective of sustainable tourism, is the fact that the entire camp is powered entirely by solar panels set on the roof of a communal boma in the centre of the camp.

Mkhuze Game Reserve

Mkhuze Game Reserve was proclaimed in 1912 to protect a relic population of black rhino (Pooley & Player, 1995:184; Stuart, 2018:103). The reserve currently protects all of the Big Five megafauna species as well as cheetah, wild dog, hippo, white rhino, giraffe, zebra, warthog and 12 antelope species (Dixon, 1964:40-56; Pooley and Player, 1995:190). By the late 19th century much of the wildlife had been eradicated by hunters and only two of the Big Five species had survived (Stuart, 1997:128). An occasional lion and elephant occurred in the reserve in the 1940s, but did not survive to the present time. (Stokes, 1941:350),

In 1961 white rhino were translocated from iMfolozi Game Reserve and giraffe were reintroduced in 1965 (Dixon, 1964:49; Gush, 2000:20, 126). Cheetah were released in 1966 and again in 1986 (Gush, 2000:147). Elephants were reintroduced in 1994 and buffalo were later re-established (Beyer & Duggan, 1997:162). The re-introduction of 13 wild dogs took place in 2005 and eight lions were released in 2013, completing the return of almost all the species which had occurred in the past (Bush Notes, 2005:35; Zululand Observer, 2013).

Apart from the Big Five species, Mkhuze protects an estimated 4,800 nyala, an antelope of the *Tragelaphus* family which is common in many of the Zululand game reserves. Nyala are sought after by tourists as the species has a very limited range in Africa and occurs in only four countries in South-eastern Africa, and in two of these countries is restricted to one or two localities (Stuart, 2000:120; Stuart, 2007:208).

From the tourist's perspective, it could be argued that Mkhuze Game Reserve's most compelling competitive advantage is its three game-viewing hides, some of the first ever constructed in African parks. These wood-and-thatch structures allow tourists to sit close to waterholes and wait for wildlife to appear from the surrounding bush. The first hide was completed in 1960 at an artificial waterhole that had been constructed following a severe drought in the late 1950s (Pooley & Player, 1995:186, 187; Gush, 2000:88).

Two hides were subsequently established in clearings in the sand forest south of the rest camp. KuMasinga was completed in 1966 after the initial hide, KuBube, had proved to be extremely popular amongst tourists (Gush, 2000:89). KuMasinga hide is the most well-known and popular hide and described as, "in among these thickets, lies a gem of a viewing hide, the Kumasinga Bird Hide, which is one of the best hides for wildlife photography in South Africa" (Compion, 2010:101).

Mkhuze Game Reserve is also popular amongst tourists who are interested in bird watching. The bird list exceeds 450 species and in South Africa is surpassed only by the Kruger National Park, which is 50 times larger (Cohen, Spottiswoode & Roussouw, 2006:141). Mkhuze Game Reserve has been linked to the iSimangaliso Wetland Park and World Heritage Site through land acquisition (Map 1), although a fence currently prevents the free movement of wildlife between the two units.

From Figure 5 it is evident that visitors, once again are making a distinction between the game reserves and the rest camps. Mkhuze Game Reserve received a rating of 31.9% and 40.3% for "excellent" and "good" respectively, but the camp only received a rating of 18.4% and 26.5% for the same criteria. Mantuma camp is unfenced and includes four different categories of accommodation (Figures 18, 19), a swimming pool and small restaurant, but did not attain a high score. For the 2017/2018 financial year, the occupancy rate for accommodation was 51% (Ezemvelo KZN Wildlife, 2018:74).

The Ndumo Game Reserve is located on the Mozambique border (Map 1) and was proclaimed in 1924 to protect the hippo frequenting the pans between the confluence of the Phongolo and Msuthu rivers. The game reserve occupies 10,117 hectares, and the larger Tembe Elephant Park is located 7 kilometres to the east (Pooley & Player, 1995:223, 227, 229; Stuart, 2018: 119). The vegetation of the Ndumo Game Reserve consists of dense bush, thicket and sandveld and forest-dwelling antelope such as nyala, red duiker and suni are present (Stuart, 2018:118). The game reserve supports three of the Big Five species and lion and elephant are not present.

Ndumo does not contain large herds of savannah wildlife species, but it attracts many bird watchers as a total of 444 bird species have been recorded (Cohen et al, 2006, 145; Stuart, 2018:120). A hide overlooking Nyamithi Pan is popular amongst bird watchers, and guided bird walks led by armed game rangers can be booked at the camp reception (Cohen et al, 2006:146).

The rest camp accommodates 14 visitors in chalets and there is a small camping site (Figures 20, 21) (Pooley & Player, 1995:231). For the 2017/2018 financial year, the occupancy rate for accommodation was 47.1% (Ezemvelo KZN Wildlife, 2018, 74). In the past visitors could only visit Nyamithi Pan on conducted drives, but the hide is now accessible and connected to the 55 kilometres of roads that are open to the public.

From Figure 5 it is apparent that the game reserve achieved an "excellent" score of 35.7% and a "good" score of 35.7%. Of the four state-run game reserves surveyed in the region (Map 1), Ndumo is the only game reserve which did not receive the lowest possible rating. The rest camp was rated as "excellent" and "good" by 21.9% and 37.6% of respondents respectively.

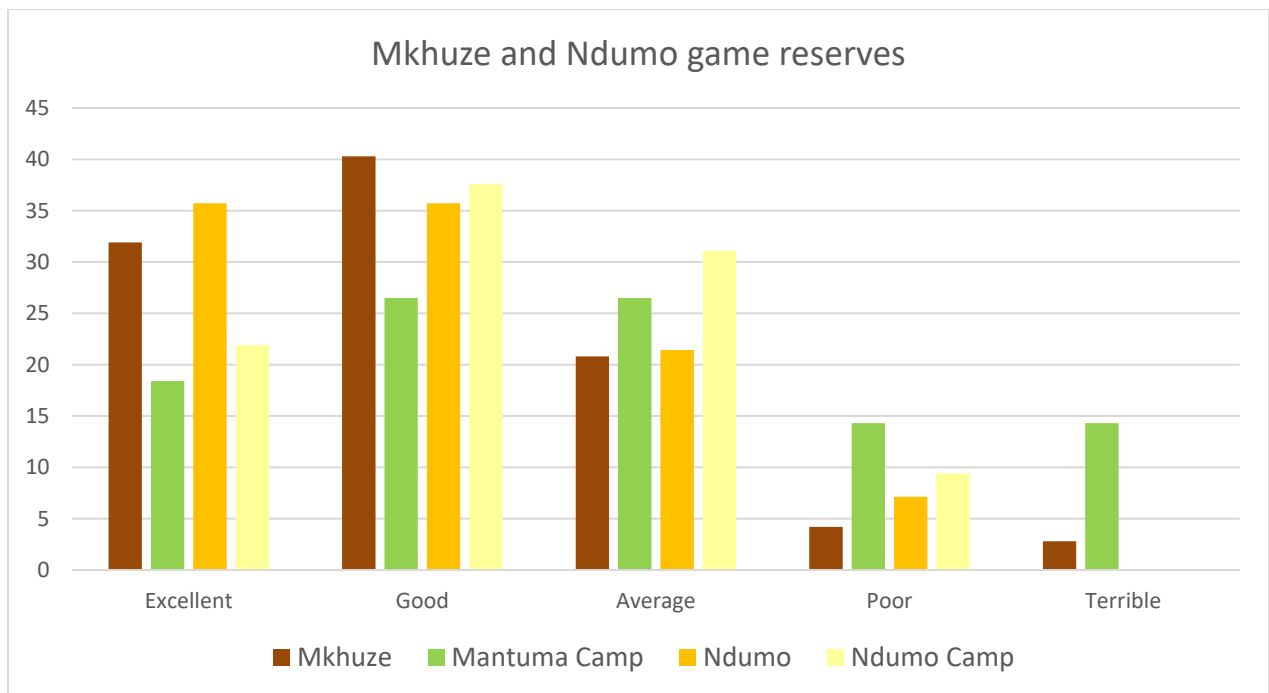


Figure 5: Customer service rating for the Mkhuze and Ndumo game reserves

Private lodges in state-run game reserves

Of the total of 9,236 reviews analysed in this research, 9% were for three private game lodges located within state-run game reserves, or with their own entrance gate, or on incorporated community-owned land. This category attained the highest score (Figures 3, 6) of the five categories allocated to respondents in this research. An average “excellent” rating was posted by 75.5% of respondents, and a further 17.7% recorded a rating of “good.” Dissatisfied customers accounted for only 15, or 1.8%, of the 832 respondents. The two highest categories were, therefore, selected by 93.2% of visitors to the three private lodges.

Tembe Elephant Park, occupying 30,013 hectares, was established in 1983 to protect the last elephants in KwaZulu-Natal (Pooley & Player, 1995:223; Tembe Elephant Park, 2016:5). The land was made available for conservation by the Tembe Traditional Authority. Tembe Elephant Park was initially established to protect herd of elephants, but black rhino, white rhino, lion and wild dog have been re-introduced. Apart from the Big Five species, there are 10 antelope species and zebra and giraffe (Tembe Elephant Park, 2018:13). A recent decision was made to remove the wild dog pack because of predation on the livestock belonging to neighbouring communities, but this is being legally challenged by one of the lodges within the game reserve (Ezemvelo, 2018:43).

The vegetation consists largely of sand forest and sandy bushveld on deep sands of marine origin (Stuart, 2018:113, 114). Tembe Elephant Park is unusual amongst the Ezemvelo KZN Wildlife estate as the sandy terrain restricts access to four-wheel drive vehicles. There is a network of single-lane tracks in the southern portion of the game reserve, and two hides are located at waterholes in the eastern section of the game reserve (Tembe Elephant Park, 2016: 16). As the roads are not designed for high-volume tourism, most of the visitors are conducted on guided game drives operated by the two private lodges (Figure 23).

There two private lodges in the Tembe Elephant Park represent the only tourist accommodation as no facilities are provided by Ezemvelo KZN Wildlife. The Royal Thonga Lodge adjoins the south-eastern border of the game reserve and has its own entrance gate.

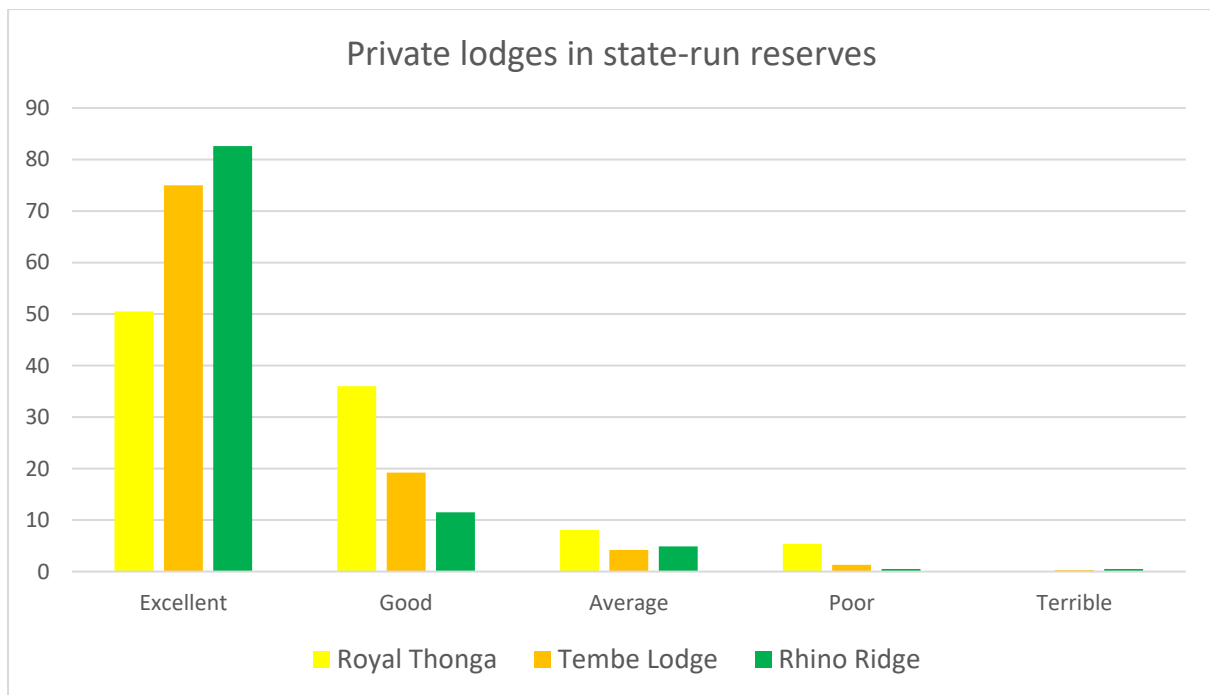


Figure 6: Customer service rating for private lodges with easy access to state-run game reserves

Tembe Lodge (Figures 22-25) is an exclusive, tented camp consisting of 16 large safari tents set in the sandveld and surrounding a communal dining room, fire pit and bar. The lodge is located within the game reserve and is easily accessible from the entrance gate.

The tariff at the two lodges in Tembe Elephant Park include meals and two game drives a day, and range from \$100¹ to \$114 per person per night (pppn). As these lodges are offering tourists an exclusive, wildlife-based experience, but at lower tariffs than is the norm for the private game lodges bordering the Kruger National Park, the business strategy adopted can be defined as Porter's cost leadership strategy (Porter, 1985:13).

The third private lodge located within a state-run game reserve, Rhino Ridge, was opened in 2015 on land belonging to the Mpembeni Community, on the south-western border of the Hluhluwe section of the Hluhluwe-iMfolozi Game Reserve (Map 1). The lodge is managed by Isibindi Africa and incorporated 750 hectares of community-owned land into the game reserve (Wildside, 2018). The overnight tariff is \$513 pppn, and the lodge received an "excellent" rating from 82.6% of respondents (Figure 6).

Pongola Game Reserve

The current Pongola (Phongolo) Game Reserve partly occupies land which was once part of what some sources regard as the first proclaimed game reserve in Africa. In June 1894 seven farms, occupying a narrow strip comprising 17,400 hectares, were proclaimed as the Pongola Game Reserve in the extreme south-eastern corner of the Zuid-Afrikaansche Republiek (ZAR) (Stevenson-Hamilton, 1937:87; Pringle, 1982:51). The Pongola Game Reserve predated the predecessor of the Kruger National Park by four years, but the game reserve was later considered to be too small and was de-proclaimed in 1921 (Stevenson-Hamilton, 1937:102; Carruthers, 1985:13). As Carruthers (1985:14) has argued, the decision to set this land aside as a game reserve was motivated more by political than ecological considerations. In 1972 the Pongolapoort Dam was completed across a gorge where the Phongolo River flows through the Lebombo Mountains and inundated an area of 12,470 hectares, divided between the then-

¹ Based on an exchange rate of R14.44 to the US\$ on 29 March 2019.

provinces of Transvaal, Natal and the country of Swaziland (Phongolo Nature Reserve 2009: 69). Land expropriated around the shore of the reservoir by the state, was later set aside as a game reserve. In 1994 this portion of the former Transvaal province north of the Phongolo River was incorporated into KwaZulu-Natal. The state-owned game reserve covers 10,540 hectares and has been complemented by several contiguous private game reserves which cover approximately 16,000 hectares (Slater and Knights, 2011) (Map 1). Including some of the land inundated by the dam, about two-thirds of the original game reserve of 1894 has been re-established by both state-run and private game reserves.

Carruthers (1988:253) and Grove (1995:465) refer to earlier legal attempts to protect elephants in the Knysna Forest in the Cape Colony, from as early as 1846 and 1857, as a “proto-game reserve”, although Grove suggests that the true motive was to “protect the forest in which the elephants lived” (466). From 1888 onwards, the Cape government began to declare the Knysna forests as state forest reserves, and since 2005 the forests have been incorporated into the Garden Route National Park (Brett, 2010;20-23).

It could therefore be argued that while conservation has been uninterrupted in the Knysna Forests since the 19th century, in the case of the Pongola Game Reserve it was de-proclaimed for more than 50 years. Whether the Pongola Game Reserve should be regarded as the oldest or second oldest game reserve in Africa, it cannot be disputed that it has historic significance. As the wall of the Pongolapoort Dam is located at the end of a 7-km-long gorge, it is not visible from the game reserve which surrounds most of the reservoir. The Lebombo Mountains rise 530 metres above the reservoir along the eastern shore of the lake and, with the surrounding semi-arid bushveld, the setting resembles some of the Rift Valley lakes in Kenya, such as Lake Bogoria, which has contributed to its success as a tourist destination (Trillo, 1991, 158, 160). Arising from a combination of game viewing, house boats and tiger fishing, which is very restricted in South Africa, the Pongolapoort Dam has developed into a destination which in many ways replicates Lake Kariba in Zimbabwe (Igoe, 1990:103, 107).

The private lodges in the Pongola Game Reserve received many favourable ratings on TripAdvisor. From the 478 quantified reviews posted for five lodges, an assessment of “excellent” and “good” was posted for 68.6% and 24.7% of the reviews respectively. In the two unsatisfactory categories of “poor” and “terrible” only 15 reviews were posted.

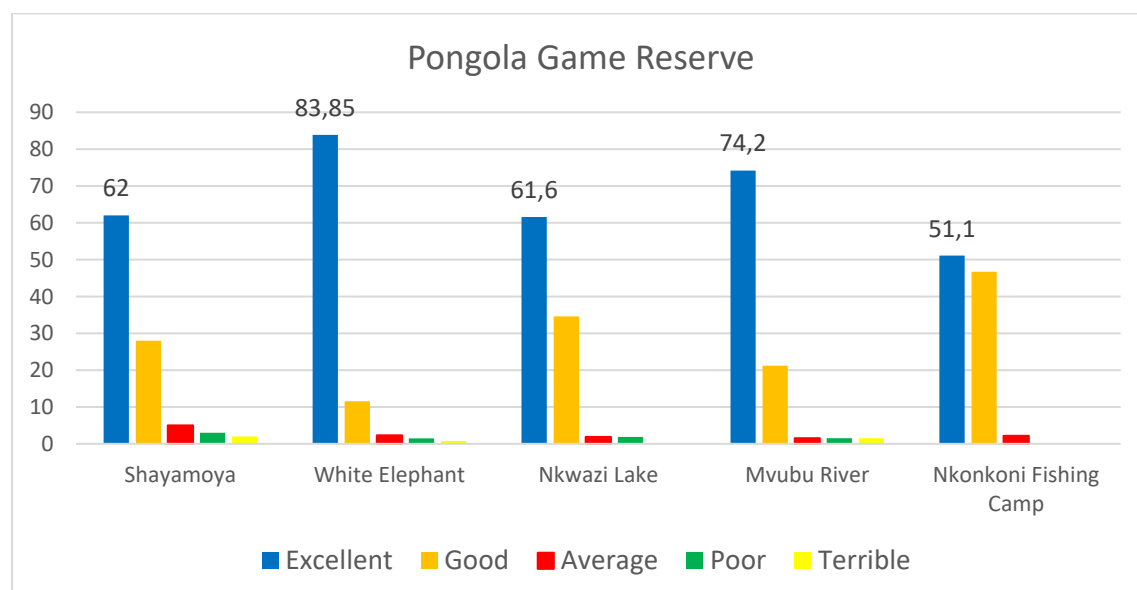


Figure 7: Customer service rating for the Pongola Game Reserve

Manyoni Private Game Reserve

The Manyoni Private Game Reserve was previously known as the Zululand Rhino Reserve and encompasses 23,000 hectares of land west of the N2 and easily accessible from the two largest provincial game reserves in the region. The game reserve was established in 2004 when 17 land-owners removed nearly 200 kilometres of inter-leading fences and formed a consolidated game reserve (Wildlife Act). Wildlife species which occurred historically have been re-established. A population of black rhino was re-introduced in 2005 and other species re-introduced include elephant, white rhino, buffalo, giraffe and zebra. Between 2009 and 2014 predators such as cheetah, lions and wild dogs were released (Wildlife Act).

Manyoni has seven lodges (Map 1) and tariffs range from \$88 pppn at African Spirit, to \$428 pppn at Leopard Mountains and \$545 pppn at Rhino Sands. The Thanda Game Reserve adjoins the southern boundary of Manyoni and covers 7,130 hectares. The adjacent Mduna Royal Reserve is managed as part of Thanda and the combined area totals 14,696 hectares (van Rooyen, 2013:3). The tariff at Thanda is \$536 pppn.

From Figure 8 it is clear that the eight lodges performed very well and achieved high rates of customer satisfaction. From 2,231 reviews posted, “excellent” was recorded by 85.3% and “good” by 10.9% of respondents. The lowest possible score of “terrible” was recorded by only eight, or 0.36% of respondents.

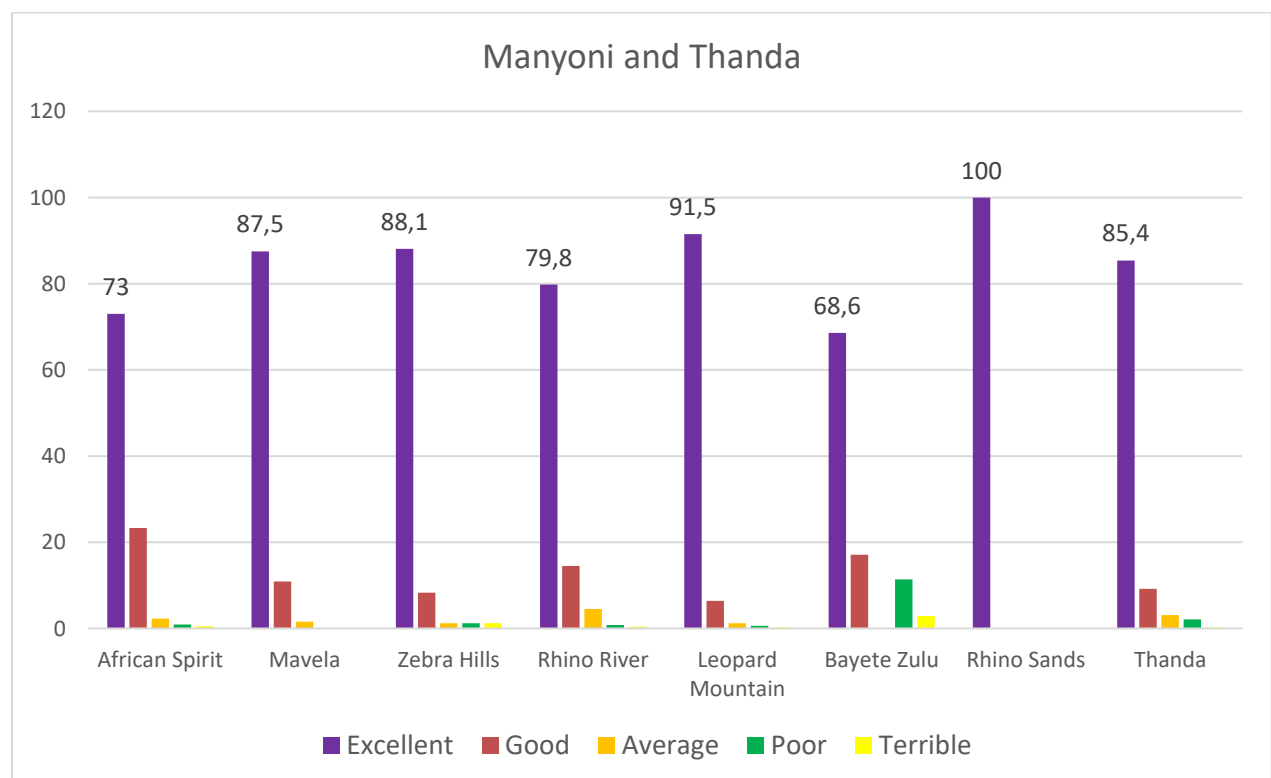


Figure 8: Customer service rating for the Zulu Rhino Reserve

Mun-ya-wana and Zulu Nyala.

The Phinda Game Reserve was established in 1991 by the Conservation Corporation after a number of properties were consolidated and initially covered 13,076 hectares. Fences between neighbouring properties have since been removed and the Mun-ya-wana Conservancy now covers 28,622 hectares, of which Phinda comprises 59% of the area (Andbeyond). Since the removal of fences, the adjacent Zuka and Bayala are now part of the enlarged game reserve (Bayala Game Lodge).

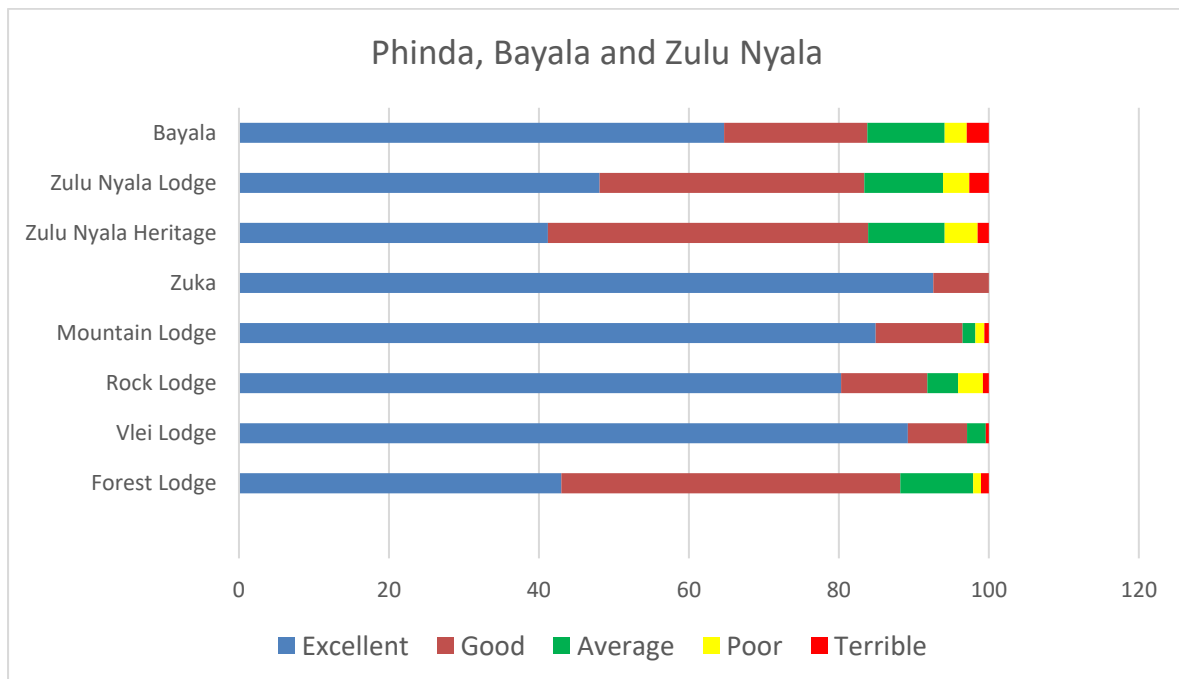


Figure 9: Customer service rating for Phinda, Bayala and Zulu Nyala private game reserves

Phinda was the first private, Big Five game reserve to be established in KwaZulu-Natal and the six lodges accommodate a total of 123 visitors. Mountain Lodge is the largest and can accommodate a total of 67 visitors in 25 suites. Accommodation tariffs at Phinda range from \$545 to \$750 pppn. From Figure 9 it is apparent that all of the Phinda lodges obtained an “excellent” and “good” rating which exceeded 80%.

Bordering Phinda to the south, Zulu Nyala’s two lodge consist of the 114-bed Heritage Hotel (Figures 26, 27) and the 100-bed Zulu Nyala Lodge. The two lodges cater for larger groups and at a lower tariff than that charged by Phinda, and cater for a different market segment. For the 1,222 posted for the two Zulu Nyala lodges, 83.6% of respondents recorded an “excellent” or “good” rating.

Small private game reserves

Within 15 kilometres of the Hluhluwe village, nine small private game reserves were included in the study. The majority of these properties do not contain the Big Five species, although Bonamanzi (Figures 28, 29) supports four of the Big Five species. The properties range in size from 65 hectares to 1,400 hectares and therefore, in most cases, cannot support animals such as elephant and lion. However, the close proximity of the Hluhluwe-iMfolozi Game Reserve complements the activities offered by these small game reserves, and the majority offer guided game drives to the game reserve.

In the case of the small game reserves located south of Hluhluwe, Emdoneni covers 65 hectares and Malala 137 hectares, and wildlife is limited to zebra and a few antelope such as impala and nyala. However, as these reserves are easily accessible from the N2, and provide accommodation which is within 21 km of one of the main entrance gates to Hluhluwe-iMfolozi Game Reserve, they offer a convenient base for visiting the larger game reserve. An important consideration is that tourists are not restricted by the strict entrance gate closing times which are enforced at the state-owned game reserves, and can arrive at night. Both of these small private game reserves obtained a rating in excess of 94% for the two highest scores of “excellent” and “good.” The overnight tariff for the small game reserves varies from \$33 pppn at Ezulwini, to \$113 pppn at Emdoneni and \$134 pppn at Ubizane’s Tree Lodge (Figure 31).

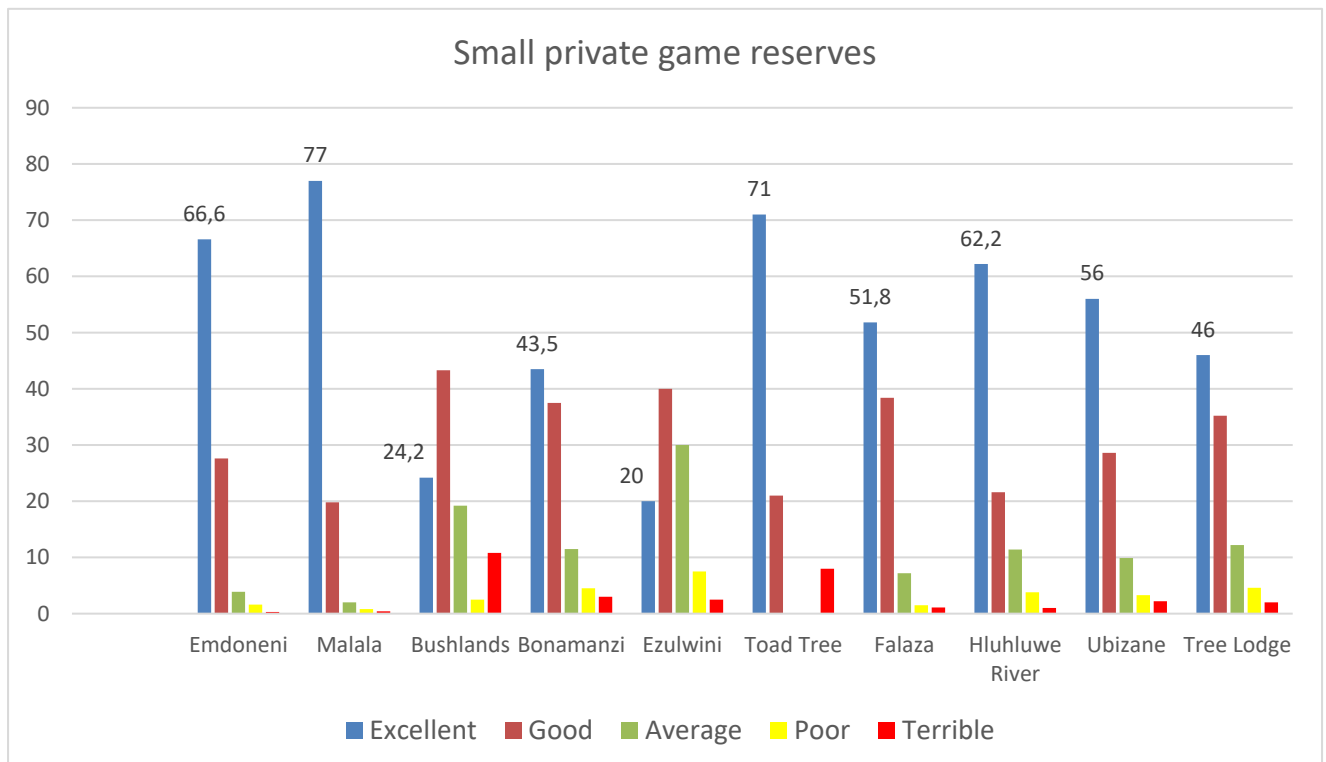


Figure 10: Customer service rating for small private game reserves in vicinity of Hluhluwe

Do the larger private achieve reserves achieve higher customer satisfaction scores?

As there are 35 lodges in the study area, the tourist is faced with many options. The private game reserves range in size from 65 to 28,622 hectares, and two of the state-run game reserves exceed 100,000 hectares in area. A research question that was investigated was whether there is any correlation between the size of a game reserve and the customer's experience of service. As the larger game reserves offer a greater range of ecological patterns and processes, and therefore a greater diversity of outdoor experiences and an extensive road network, the hypothesis was that tourists would rate these destinations at a higher rate than for the smaller game reserves.

The null hypothesis (H_0), for this study, was that there is no correlation between customer ratings of service excellence and the size of a private game reserve. The alternative hypothesis (H_1) is that in the eco-tourism industry the size of the reserve is important as larger reserves will contain a greater diversity of species, and better functioning ecosystems. The alternative hypothesis, therefore, was that the larger reserves would attain higher customer satisfaction scores as they are offering tourists a superior experience and a greater selection of activities.

Using Spearman's correlation, if a p-value is very low there is a very low probability that the null hypothesis is wrong, and the alternative (H_1) hypothesis must be accepted. Above a 5% probability level ($p=0.05$) the null hypothesis will be considered correct, and below the level there is a 95% probability that the null hypothesis is wrong. In Figure 11, the R_s value is 0.187 suggesting a very weak correlation between the data sets. As the P-value is 0.2809, the null hypothesis cannot be rejected.



Figure 11: Relationship between customer excellence score and the size of a game reserve

The results suggest that service excellence scores amongst the private game reserves are not dependent on size, because the owners have taken compensatory actions. These actions include offering regular, guided game drives to the nearby provincial game reserves, or by offering accommodation which conforms to Porter's differentiation focus as it is not easily replicated in the state-managed game reserves (Porter, 1985:13).

Implications of the study

By 2001, although the Kruger National Park was attracting in excess of 800,000 visitors per annum, the park was not attracting the upper segment of the foreign market. Although the Kruger National Park, because of its immense area, was sustaining the ecological patterns and processes that were attracting visitors to the adjacent private game reserves, the park was not benefitting from this segment of the tourism industry. The decision was taken to demarcate six, exclusive concession areas, which would eventually contain 16 concession lodges (Brett, 2018:14). This business strategy is an example of Porter's differentiation focus (Porter, 1985:16; SANParks, 2018). By so doing, SANParks was able to compete for a segment of the market which had previously avoided the national parks (SANParks, 2008). For the concession lodges, the production and delivery systems differ from the standard, traditional tourist accommodation which is constructed, maintained and operated by SANParks. This is because the concession lodges are managed by operators with decades of experience in the high-end of the tourism industry, and are not staffed or operated by SANParks (SANParks, 2008).

The concession lodges in three national parks generated 36% of the \$5.2 million concession revenue in the 2016/2017 financial year and recorded a 69.1% occupancy rate (SANParks, 2017:97, 98). In the 2017/2018 financial year, concession income increased by 9.4% to \$5.78 million (SANParks, 2018:108). In contrast, Ezemvelo KZN Wildlife earned \$247,000

from concessions in the 2017/2018 financial year (Ezemvelo KZN Wildlife, 2018:130).

In 1958 an area of 32,000 hectares was declared as a wilderness area in the iMfolozi section. This was the first wilderness area to be established in Africa, but the designation has no legal status (Cryer, 2009:5, 9; Ezemvelo KZN Wildlife, 2011:2). The 2011 management plan for Hluhluwe-iMfolozi Game Reserve regards uncontrolled tourism and development within the protected area and on the boundary as a potential threat to the wilderness area. The management plan also regards poverty in neighbouring communities as a threat to biodiversity, but states that the integrity of the wilderness area should be protected (Ezemvelo KZN Wildlife, 2011:28, 29)

The construction of two new Mantis Group lodges within the iMfolozi Wilderness Area (Mantis Collection, 2017) will be regarded in some quarters as a violation of the sanctity of the wilderness. Located on the southern bank of the White Umfolozi River, the 22-bed Mthembu Lodge was opened to tourists in September 2018 and the tariff for each of the seven, 2-bed villas, each one with an area of 112 m², is \$1,592 per night. Mthembu Lodge, and the 32-bed Biyela Lodge to be constructed 8.5 kilometres to the north-west, has added 6,000 hectares of community-owned land to the game reserve (Mantis Collection, 2017). Given the pressing socio-economic conditions which occur just across the boundary fence of every game reserve in the region, and Ezemvelo KZN Wildlife's poor financial state, perhaps it should be questioned whether the concept of a wilderness area is still compatible with current realities.

In the 2017/2018 financial year, SANParks received a government subsidy of \$39.5 million, or 22%, of its total budget of \$178.8 million. In contrast, Ezemvelo KZN Wildlife received a government subsidy of \$57.6 million, or 70%, of its total budget of \$81.9 million. SANParks manages an area of nearly 4.1 million hectares, compared to a terrestrial area of 745,000 hectares managed by Ezemvelo KZN Wildlife. Revenue generated by the 110 provincial reserves managed by Ezemvelo KZN Wildlife amounted to only 14.3% of the revenue earned by SANParks from 19 national parks (Ezemvelo, 2018, 109: SANParks, 2018:266). The majority of the Ezemvelo KZN Wildlife nature reserves are too small to be viable, both from an ecological and a tourism perspective, and only eight reserves are larger than 10,000 hectares in area. This situation was paralleled in the mid-1970s, when six of the country's nine national parks were smaller than 10,000 hectares, but a concerted land acquisition programme has subsequently expanded all but one of these national parks (Brett, 2010:8).

As the provincial conservation agency in KwaZulu-Natal faces increasing financial pressures and decreasing government subsidies, it is tempting at times to make hasty decisions, such as the recent attempt to transfer Ezemvelo's assets to a trust controlled by private people and including the king of eSwatini (Mngoma & Mbanjwa, 2018; Ndou, 2018). Although the organisation faces serious financial constraints, Ezemvelo KZN Wildlife still has some space to manoeuvre and can benefit from concession lodges established on the borders of game reserves.

Conclusion

This research has found that private game lodges are attaining high customer satisfaction scores, even when the offerings consist of a small population of antelope on a modest piece of land. In contrast, the rest camps operated by Ezemvelo KZN Wildlife received far lower scores than even those obtained by the smallest private game reserves.

For the state-run entities in the study areas, new and innovative approaches are needed to guarantee service excellence, maintain effective biodiversity conservation and create employment and economic opportunities for neighbouring communities. Given the fact that many of the province's game- and nature- reserves adjoin parcels of land which could be incorporated into the conservation estate, even in densely populated regions, it appears that

there is potential for a win: win solution. Incorporating land, as in the example of the Mantis lodges, has potential for creating corridors and linking several discontinuous game reserves (Mantis Collection, 2017). In many districts, where poverty is a pressing problem, there is still potential to add community land to existing game reserves. This is certainly the case in the examples of the Phongolo, Ndumo, Mkhuze and Hluhluwe-iMfolozi reserves.

Creating larger and more viable game reserves by dropping fences between Phinda, Zulu Nyala, Manyoni, Thanda and Mkhuze should be regarded as a priority. A large protected area will sustain a greater array of ecological patterns and processes, while tourist numbers and overcrowding can be managed by limiting traversing rights to individual member's properties. This will result in a patchwork of state-, private- and community- owned game reserves which will be able to sustain wild animals, such as elephant and wild dog, which require large areas. At the same time, new opportunities can be created to construct lodges within the region which will cater for the needs of tourists, while at the same time creating opportunities for skills transfer and revenue streams for adjacent communities.



Figure 12: The restaurant at Hilltop, Hluhluwe, is part of an extensive redevelopment of the camp which was completed in 1993 Source: Author's own



Figure 13: The Uzavolo Bar at Hilltop is decorated in old photographs and other memorabilia from the game reserve's formative years Source: Author's own



Figure 14: The 2-bed rondavels at Hilltop, Hluhluwe, were the first accommodation provided for tourists to the Zululand game reserves and have been retained as part of the upgraded rest camp Source: Author's own



Figure 15; Interior of one of the 25 chalets which were completed when Hilltop Camp, Hluhluwe, was enlarged in 1993 Source: Author's own



Figure 16: The 20-bed Nselweni Bush Lodge, completed in 2009, combines canvas and concrete and is powered entirely by solar panels Source: Author's own



Figure 17: The renovated 2-bed chalets at Mpila Camp, iMfolozi Source: Author's own



Figure 18: Each of the ten 2-bed safari tents in the unfenced Mantuma camp, Mkhuze Game Reserve, is equipped with a separate kitchen unit and en suite bathroom Source: Author's own



Figure 19: The exclusive Nhlonhlela Bush Lodge, Mkhuze Game Reserve, accommodates 8 visitors in four thatch-and-reed chalets Source: Author's own



Figure 20: The rest camp at Ndumo Game Reserve consists of seven 2-bed rest huts Source: Author's own



Figure 21: Interior of a 2-bed rest hut at Ndumo Game Reserve Source: Author's own



Figure 22: Reception office and dining room at Tembe Lodge, Tembe Elephant Park Source: Author's own



Figure 23: The tariff at Tembe Lodge, which is located within the state-run Tembe Elephant Park, includes two game drives per day Source: Author's own



Figure 24: Exterior view of one of the 16 safari tents at Tembe Lodge Source: Author's own



Figure 25: Interior of a safari tent at Tembe Lodge, Tembe Elephant Park Source: Author's own



Figure 26: Exterior view of accommodation at Zulu Nyala Heritage Hotel Source: Author's own



Figure 27: Interior view of accommodation at Zulu Nyala Heritage Hotel Source: Author's own



Figure 28: View of conference centre and bar overlooking a dam at Lalapanzi Lodge, Bonamanzi Game Reserve Source: Author's own



Figure 29: Interior of a two-bed Lalapanzi unit, Bonamanzi Game Reserve Source: Author's own



Figure 30: The rondavels at Ubizane Game Ranch are 14 km from Memorial Entrance Gate, Hluhluwe-iMfolozi Game Reserve Source: Author's own



Figure 31: The Zululand Tree Lodge at Ubizane Game Ranch Source: Author's own

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