



Cost Leadership or Differentiation? Applying Porter's Competitive Strategies in Ecotourism: A Case Study of Mkhuze Game Reserve

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Abstract

Mkhuze Game Reserve was proclaimed in 1912 and is one of the oldest extant protected areas in South Africa. The game reserve provides six categories of tourist accommodation within the Mantuma rest camp, and at a separate exclusive, bush lodge overlooking the Nhlonhlela Pan. Porter (1980) developed three generic strategies for business and argues that any business can focus on *cost leadership*, *differentiation*, or can adopt a *cost leadership focus* within a differentiation strategy, or a *differentiation focus* within a broad cost leadership strategy. This study analyses tourist preferences for huted accommodation in a state-run game reserve in KwaZulu-Natal and concludes that even where superior accommodation facilities were available, customers expressed a preference for more affordable accommodation. The low-cost accommodation options, even where they involve a shared kitchen and ablution facilities, obtained a higher occupancy rate than for the more exclusive safari tents, which include en-suite bathrooms and separate kitchens. Tourists showed no marked preference for the newer accommodation units, and the two most popular categories of accommodation were constructed from 38 to 57 years ago. The 2-bed and 4-bed safari tents, which are situated in the bush and which offer greater privacy and closer contact with wild animals, only achieved a combined occupancy rate of 46%. Accommodation units which accommodate from six to eight tourists, displayed low occupancy rates of 44% and 38% respectively, which reflects of the size of the average touring party. The study reveals that although the section of the market which is attracted to Mkhuze is concerned with cost, accommodation categories which include television and other amenities achieved the highest occupancy rates. This suggests that tourist preferences have changed over time, and facilities, which were at one time considered to be incompatible with protected areas, are now desired by tourists. The *differentiation focus*, in the example of the Nhlonhlela bush lodge, recorded a low occupancy rate, but the study concludes that this is due to the current tariff system where the minimum charge for the facility is for six people, and is not due to a failure of the *differentiation focus*.

Keywords: Porter, cost leadership, differentiation, ecotourism, tourist accommodation, South Africa

Introduction

Mkhuze Game Reserve is situated in northern KwaZulu-Natal, Republic of South Africa, and encompasses the plains, ranging from 90 to 150 metres above sea level, which stretch to the east of the Lebombo Mountains and extend south of the Mkhuze River.

At the beginning of the 20th century, the Mkhuze thickets harboured a dense population of the tsetse fly, which partly explains why it had survived as a haven for wildlife (Pringle, 1982, 147). It is one of the oldest extant protected areas in South Africa and was proclaimed in 1912 to



protect a remnant population of black rhino (Pooley and Player, 1995, 186). The initial game reserve covered approximately 25,000 ha. Consolidation of Mkhuze Game Reserve and Lake St Lucia was recommended as early as 1963 by the Wildlife Society of Southern Africa, but was only finally achieved three decades later (Pringle, 1982, 283). From 1972 onwards the game reserve was extended to the south by incorporating state land and purchasing private farms, and now covers 37,985 ha (Pooley and Player, 1995, 184; Gush, 2000, 54). Mkhuze was later joined to the iSimangaliso Wetland Park and World Heritage Site, although a game fence prevents the free movement of wildlife to other portions of the park.

The vegetation consists mainly of Western Maputaland Clay Bushveld (SVI 20) and Makatini Clay Thicket (SVI 21). The sand forest, which occupies large tracts in the centre of the game reserve, is defined as Western Maputaland Sandy Bushveld (SVI 19), while the eastern slopes of the Lebombo Mountains fall under the category, Southern Lebombo Bushveld (SVI 16). The riverine forests which follow the course of the Mkhuze River are defined as Lowveld Riverine Forest (FOa1) (Mucina and Rutherford, 2006, 501-505, 607).

Mkhuze 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). Until recently the game reserve supported only two of the Big Five species which are sought after by many tourists to African protected areas (Stuart, 1997, 128). Lions and elephants occurred in the reserve in the 1940s (Stokes, 1941, 350), but did not survive to the present time. Stokes (1941) also states that the game reserve, "will probably be disestablished, the commission....having reported that it is not a satisfactory reserve, partly because of droughts there" (351). This commission had been appointed in 1933 by the Natal Provincial Council to investigate the viability of the Zululand game reserves (Pringle, 1982, 140, 142).

The first white rhino were relocated from iMfolozi Game Reserve in 1961 (Dixon, 1964, 49; Gush, 2000, 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 and Duggan, 1997, 162). The reintroduction of 13 wild dogs took place in 2005, and the eight lions released in 2013 mark the final re-introductions of historically-occurring species (Bush Notes, 2005, 35; Zululand Observer, 2013).

Mkhuze Game Reserve now contains the full component of mammal species which would have occurred in the region on a permanent basis in historic times. Apart from predators and the non-predator Big Five species, Mkhuze is well known for its large population of 4800 nyala antelope. This antelope is common in the Zululand game reserves, but has a limited range in Africa and occurs in only four countries, and in two of these countries it is found in only one or two localities (Stuart, 2000, 120; Stuart, 2007, 208).

Another of Mkhuze Game Reserve's major drawcards for tourists is the presence of game-viewing hides, some of the first ever constructed in African protected areas, which allow tourists to sit concealed at waterholes and wait for wildlife to appear from the surrounding bush. The first hide was constructed in 1960 at an artificial waterhole that had been excavated in response to a severe drought in the late 1950s, and the fear that the wildlife would migrate out of the reserve in search of water and fall prey to poachers (Pooley and Player, 1995, 186, 187; Gush, 2000, 88).

The two most famous hides are kuBube and kuMasinga, both which are situated in the sand forest south of the rest camp, but two additional hides were later built at other waterholes. The wildlife-viewing and photography opportunities afforded by these hides attract many



Map 1: Location of Mkhuze Game Reserve in relation to the provincial- and private- game reserves of northern KwaZulu-Natal Source: Author's own



tourists (Stuart, 1997, 128). KuMasinga was completed in 1966 after the initial hide, kuBube, proved to be extremely popular amongst tourists (Gush, 2000, 89). KuMasinga hide is highly rated by nature photographers 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).

With the linking of the game reserve to the iSimangaliso Wetland Park and World Heritage Site, two additional hides have been constructed on the edge of Nsumu Pan by the World Heritage Site authority (Map 1). These two hides, according to Fox, “are perched right over the water and are a photographer’s delight, particularly in the dry season” (2007: 51).

The bird list for Mkhuze Game Reserve exceeds 450 avian species and in South Africa is surpassed only by the Kruger National Park, which is 50 times larger in scope. The variety of habitats present within the game reserve, including pans and riverine vegetation, make it possible to support an abundant avian fauna. The two hides in the sand forest offer the best bird watching towards the end of the winter dry season (Cohen, Spottiswoode and Roussouw, 2006, 141).

Mkhuze Game Reserve also offers guided walks to the Fig Forest in the south-eastern corner of the reserve (Pinchuck, McCrea, Reid and Velton, 2010, 464). Despite the presence of potentially dangerous animals, such as lion, buffalo, black rhino and elephant, Mantuma Camp (27° 35’ S; 32° 13’ E) is not fenced. The camp has six different categories of accommodation and is spread out over a spacious area of 20 hectares (Map 2, 3). Mkhuze therefore offers tourists an experience which differs from some of the more popular national parks and game reserves in South Africa in several important aspects.

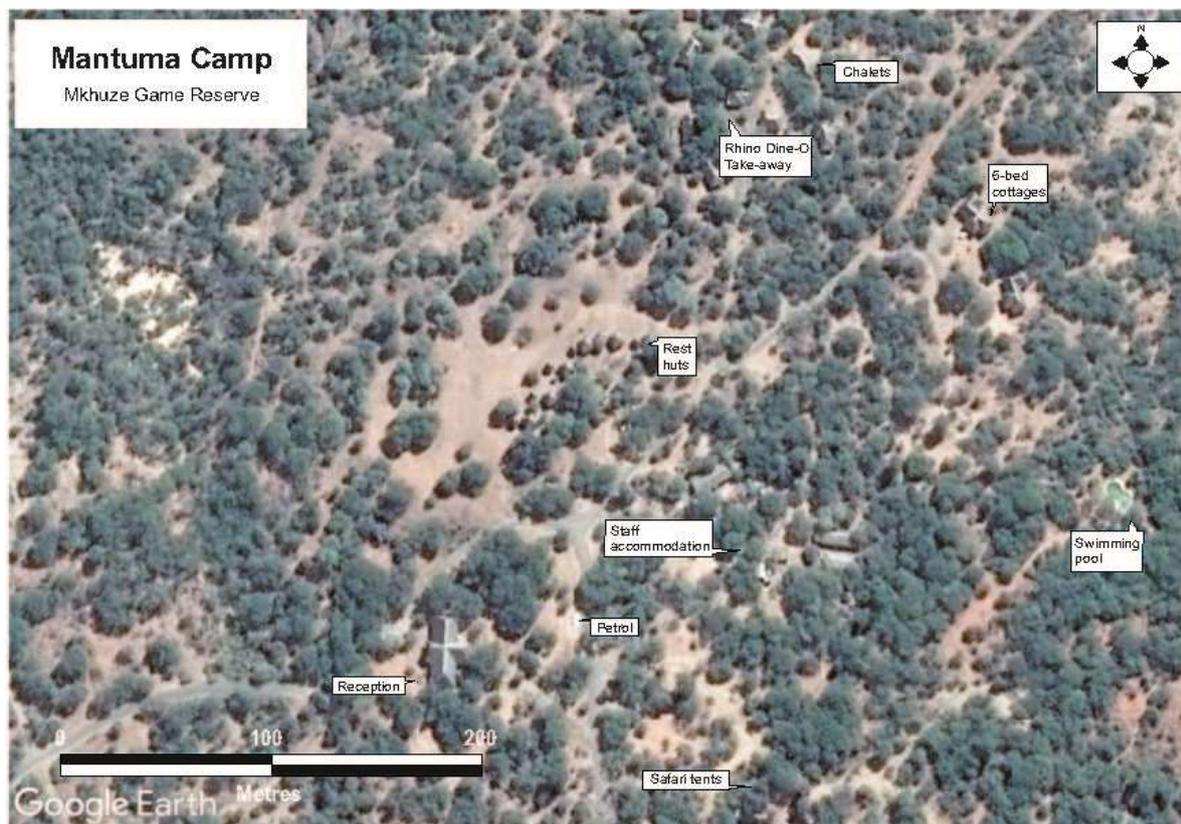
Firstly, Mkhuze visitors are not largely confined to automobiles. Flack (2016) has studied the advent of the safari park, which is positioned near one end of the continuum of human: wildlife encounters, where the one extreme would represent an ersatz replica of a natural environment, complete with concrete boulders, plastic trees and concrete waterfalls, and the other end of the continuum would be untrammelled wilderness. The majority of African national parks and game reserves, are positioned at various positions along the continuum towards the latter pole. Flack argues that the problem with motorised game-viewing, which has become the dominant mode of encountering wildlife since 1927 (Brett, 2018, 21), is that the tourist is engaging only the sense of sight.

Importantly, for Flack (2016) this reduces the authenticity of the human-wildlife experience. “‘Authenticity’ is a culturally contingent term denoting what is thought to be real, unmediated and, often, timeless. It denotes a perception of purity and this artifice sat at the heart of the park.... In this context authentic animality was positioned as essentially divorced from the human world, while authentic human-animal encounters were meant to be as close as one could get to happening upon a wild beast in its native domain...animals encountered metallic monsters while humans had their interactions with people and other animals regulated through their windscreens, car windows and the meandering curvature of the road” (2016: 41).

In the early days of the Kruger National Park, the warden wrote, “to help people’s memories we had large notices, ‘Stay in Your Car and Keep to the Road’, put up at intervals where most likely to catch the eye, and smaller ones to the same effect attached to the windscreen of each car as it entered the park” (Stevenson-Hamilton, 1937, 240).

In contrast to Flack’s observation, a guide to Mkhuze Game Reserve recommends, “the bushveld is seldom silent, so stop your car occasionally, sit quietly, and listen to the sounds of the bush” (Natal Parks Board, 1986, 4).

Secondly, there is no hard edge to the Mantuma camp, in contrast to the norm in rest camps in South Africa, Namibia and Zimbabwe, where the camp boundary is usually demarcated by a game-proof fence. Accommodation in Mantuma is scattered in the bush, almost haphazardly, and there is a seamless transition between animal and human spaces, which overlap with no hard edges apparent. In many national parks in Southern Africa, when viewed on aerial photographs, a rest camp resembles an oasis as watered lawns, the exclusion of elephants, and a subtropical or tropical climate soon result in luxuriant tree growth. A rest camp is also easily distinguishable from the surrounding bush as camp managers find it hard to resist the temptation to establish lawns and gardens. In sharp contrast, at Mantuma it is impossible to ascertain where the camp begins or ends (Map 2).



Map 2: Aerial view of Mantuma Camp, Mkhuze Game Reserve

Source: adapted from Google Earth images

Thirdly, the presence of the game-viewing hides, and the fact that many visitors are drawn to Mkhuze specifically by these carefully designed structures, tends to add a greater degree of authenticity to the experience. Before lions were introduced, despite the presence of dangerous animals such as black rhino and hippo, visitors parked their cars and walked along a footpath which meandered through the bush to the wooden passageway which leads to each hide. After lions were frequently seen at one of the hides, at some of the hides this arrangement was replaced by a fenced-in enclosure, consisting of tall game fences and a sturdy gate, which encloses the path leading to the hide (Major, 2016, pers. comm.). A measure of authenticity has therefore been compromised for the sake of visitor safety.

Methodology

Unit- and bed- occupancy rates were obtained from EKZN's Apex system and analysed for 2017. The unit- and bed- occupancy rates were computed to determine the relative contribution of each accommodation category to the total number of unit nights sold. Once



these figures were obtained they were compared to the relative contribution that each category contributes to total bed nights in Mkhuzi Game Reserve. These comparisons were plotted on pie charts and bar charts in order to determine which market segment is being attracted to the game reserve.

Porter's generic competitive strategies

Michael Porter's seminal 1980 work, *Competitive Strategy*, and his development of the Five Forces model and the three generic competitive strategies, is viewed by many authors as the most important contribution made to our understanding of competitive advantage in business. Porter's theories have stimulated a vigorous debate and have given rise to a plethora of books and journal articles, for example (Dess & Davis, 1984; Barney, 1986; Sandberg & Hofer, 1987; Wright, 1987; Miller, 1988; Mintzberg, 1988; Murray, 1988; Segev, 1989; Mintzberg, 1990; Grant, 1991; Anli, 1992; van den Bosch & de Man, 1997; Aladwani, 2001; Knight, 2001; Cho & Moon, 2002; Allen & Helms, 2006; Parnell, 2006; Amoako-Gyampah & Acquah, 2008; Ortega, 2010; Kaya, 2015; Yunna & Yisheng, 2014; Hansen, Nybakk & Panwar, 2015).

Mintzberg (1990) and de Man (1997) consider Porter's work as one of the most important books in the tradition of what is referred to as "the positioning school", or which strategy does a company choose to position itself in the market place in order to ensure success? (van den Bosch & de Man, 1997, 86). The nature of the market, which to a large extent will be determined by the five forces described by Porter, will determine which strategy a company will select (Porter, 2008, 80). Porter is clear in his exposition of his theories and postulates that a number of generic strategies provide a business with the ability to achieve competitive advantage and to, therefore, thrive in a competitive environment. The scope of a company's activities will either have a narrow focus or a broad focus (Figure 1). He defines the first strategy as *cost leadership*. If a company can succeed in keeping costs down, and can therefore charge the lowest price, then the company will succeed in maintaining a higher market share than its competitors (Porter, 1985, 13; de Wit, 1997, 9). Where the second generic strategy, *differentiation*, is the chosen strategy, it allows a company to charge higher prices because the product being offered is competing against other competitors on the basis of higher quality, or the customer's perception of higher quality. Where *differentiation* is selected, costs will be higher, but the company is able to demand a higher price because customers perceive the product as being worth the higher price (Porter, 1985, 13).

The third generic strategy, the *focus* strategy, has two variants. In *cost focus* a company seeks a cost advantage for a targeted segment of the market, whereas in *differentiation focus* the company seeks to create a *differentiated focus* for a particular market segment. Both of these approaches depend on identifying a difference between the company's usual customer base and an identified segment of the market, which would otherwise be outside of the scope of the company's business. The identified segment will either comprise customers with different needs, or the production and delivery systems must differ significantly from other segments of the industry (Porter, 1985, 16; Figure 1).

In the example of ecotourism, although the Kruger National Park was attracting 800,000 visitors by 2001, it was not attracting high-end customers. The decision to demarcate six concession areas, which would eventually contain 16 concession lodges, is an example of the *differentiation focus* strategy (SANParks, 2015; Brett, 2018, 14). By doing so, the Kruger National Park was able to compete for a segment of the market which had previously only visited the adjoining, exclusive, private game reserves (SANParks, 2008). In 2017 the concessions contributed \$5.8 million in levies to SANParks and recorded a 69.1% bed occupancy rate (SANParks, 2017, 97, 98). In the example of the concessions, the production and delivery systems differed from the standard tourist accommodation offerings,

which are constructed and operated by SANParks. The concession lodges were built by experienced operators in the high-end of the tourism industry, and are not staffed or operated by SANParks (SANParks, 2008).

Porter states that if a company attempts to combine an emphasis on low costs and differentiation, it will end up being, “stuck in the middle” (Porter, 1980, p. 41). Companies that fail to develop one of the three generic strategies, or attempt to combine them, are stuck-in-the-middle, and should anticipate below average profits (Porter, 1985, 16).

Porter argues that the three generic strategies are logical and workable approaches that a company should pursue in dealing with competition. However, if a company fails to develop a strategy which adheres to one of the three generic strategies, the company will end up in a weak strategic position. In many instances, a company may not have sufficient capital and market share to attempt *cost leadership*. Similarly, the company may not be successful at *differentiation* and could lack the expertise to pursue a *differentiation focus* strategy. The company will, therefore, not be able to attract high-end customers, and will lose these customers to companies who have succeeded in differentiation (Porter, 1985, 42).

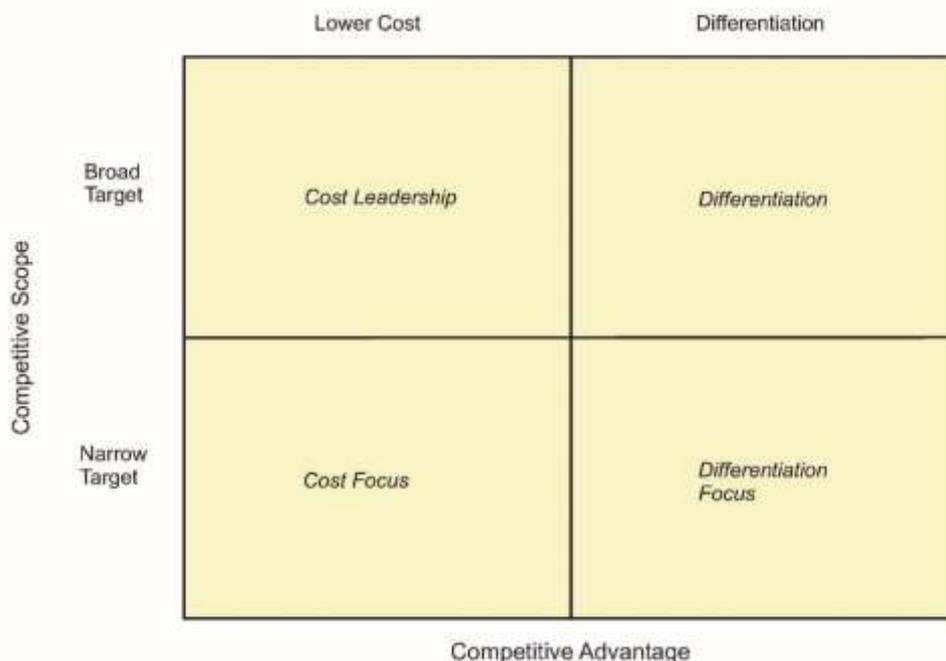


Figure 1: Porter’s Three Generic Strategies
 Source: Adapted from Porter, (1985: 12)

The effectiveness of a particular generic strategy may be dependent on industry structure (Porter, 1985). Porter argues, “Industry structure is relatively stable, but can change over time as an industry evolves. Structural change shifts the overall and relative strength of the competitive forces, and can thus positively or negatively influence industry profitability. The industry trends that are the most important for strategy are those that affect industry structure” (1985:7).

The generic strategies are not restricted to an analysis of private sector businesses alone and can be applied to parastatals who also have a customer base (Smith, 1997, 70; Porter, 2015). While it is not within the scope of this particular study to determine which strategies are being pursued by Mkhuzo’s main competitors in order to ensure business success, nevertheless, Porter’s strategies were examined to determine which niche market has Mkhuzo, and Ezemvelo KZN Wildlife (EKZNW) as the umbrella organisation, selected for “the customer you have chosen to serve” (de Man, 1997, 88; Porter, 2015).



Porter states, “competitive advantages can be divided into two basic types: lower cost than rivals or the ability to differentiate and command a premium price that exceeds the extra cost of doing so” (1991:101).

In the ecotourism industry, the “extra cost of doing so” will require increased capital costs for the construction of luxury tourist accommodation as well as the need to employ additional staff to service accommodation units, to work as kitchen and reception staff, and for guided activities. The need to operate a hotel-class kitchen, set up a reliable supply chain and have additional staff on duty for conducted game drive and walks, are all going to increase the company’s costs.

Porter argues that an established company may have cost advantages which are not easily replicable by new entrants. These may include access to raw materials as older companies may have been able to dominate the most favourable resources. Government subsidies may also result in a favourable advantage (Porter, 1980, 12).

In the example of Mkhuze Game Reserve, this assertion is certainly true. The game reserve is one of the oldest protected areas in South Africa. Subsequent human population growth in the region, the alteration of habitat and development pressures would make it impossible for a private investor to replicate the game reserve, even if considerable amounts of capital were available (Burgoyne & Kelso, 2014, 54, 56). Even if sufficient land, and the capital required to convert it into a fully functioning game reserve, were available, it is doubtful if the level of investment required would generate a satisfactory return on capital invested.

Porter’s “competing on the same stuff” and ecotourism

In the introduction to the 1998 edition of his 1980 book, Porter states, “while 1990s companies may look very different than 1980s companies or 1970s companies, superior profitability within an industry still rests on relative cost and differentiation. One may believe that faster cycle time or total quality hold the key to competing, but the acid test comes in how these practices affect industry rivalry, a company’s relative cost position, or its ability to differentiate itself and command a price premium” (Porter, 1998, xii)

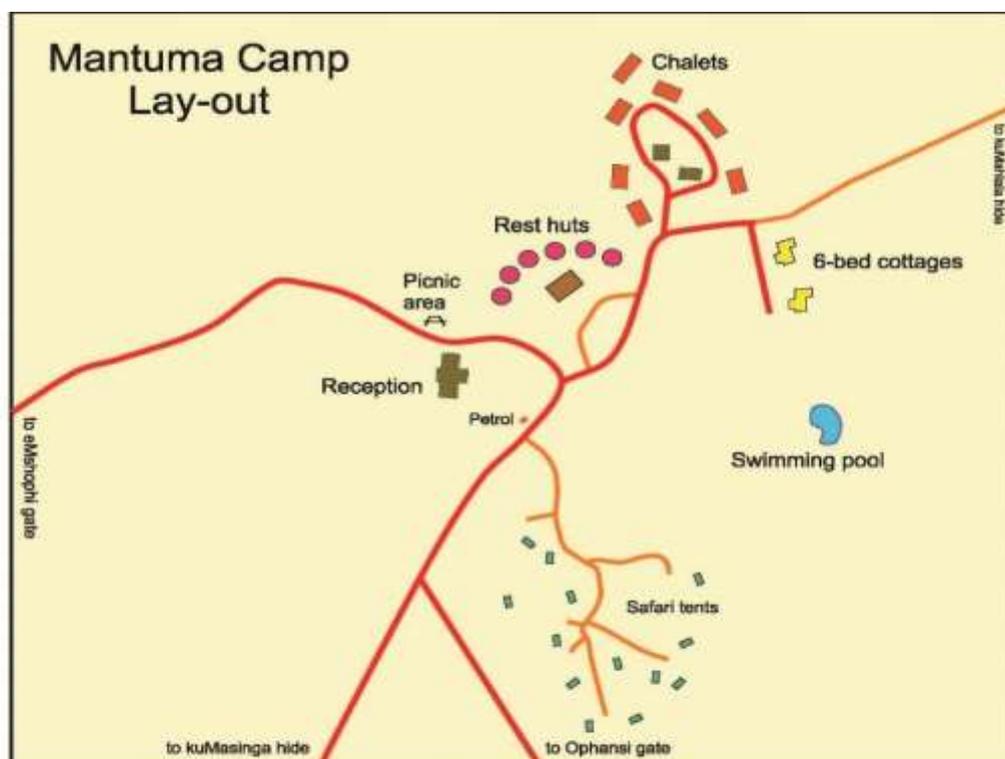
Porter warns that companies who are, “in a situation where you’re competing with your competitors on the same stuff” are in trouble and argues that, “one of the truisms of competition and strategy is: you can’t meet the needs of every customer. You can’t do that. It is impossible. If you try to meet everybody’s needs, the chances are that you won’t be very good at meeting anybody’s needs. And that is a very powerful idea in strategy. Strategy is essentially about competing to be unique. And if you find yourself in a situation where you’re competing with your competitors on the same stuff, you’re in trouble. Because you’re trying to produce the lowest price and they’re trying to produce the lowest price, and you’re in a race to produce the lowest price. What is going to happen? That is what we call a zero sum competition. You’re just going to have a race to the bottom and see whose returns are the lowest. Whereas if you think about how to be unique, we find that is more of a positive sum competition” (Porter, 2015).

Porter’s assertion, and its appropriateness for the ecotourism industry, presents a number of pertinent questions. Are all protected areas not guilty of “competing on the same stuff?” Is an impala or a giraffe in Mkhuze not the same as the same animals on a private game reserve next-door? Can a small game reserve compete against enormous and well branded national parks such as Kruger or Serengeti? Why does anybody even make the effort to visit Mkhuze when there are far larger parks within a day’s drive of major cities? Are all protected areas more or less the same and “competing on the same stuff”, or is each one unique in its own right? Does every national park and game reserve offer a unique product, which allows it to meet the needs of the customer it has chosen to serve?

These are not trivial questions because they lie at the heart of any understanding of Porter's conceptualisation of business strategy. Which customer has Mkhuze, and EKZNW as the controlling organisation, chosen to serve? Given the fact that the game and nature reserves in KwaZulu-Natal currently receive a provincial subsidy of \$58.5 million (Mngoma & Mbanjwa, 2018) and have a mandate to provide tourist facilities to the public, the chosen customer is not going to be the top end of the market. A study of the tariffs presented in Figure 2 reveals that EKZNW's competitive strategy is one of *cost leadership*, with a *differentiation focus* evident in the exclusive and more expensive bush lodges (Table 1).

Accommodation options in Mkhuze Game Reserve

Although the game reserve was proclaimed in 1912, the first visitor accommodation was only constructed in 1934 on the occasion of a visit by the Governor General and Lady Clarendon to the game reserve. No remains of this rustic structure have been found and the exact location of the building has not been discovered (Gush, 2000, 80; Figure 2) The six rest huts are the oldest extant accommodation in Mantuma (Map 2, 3). The first three rest huts were constructed in 1959 and were situated near where the safari tents now stand (Figure 3). They were later replaced by the current six rest huts in 1961 (Gush, 2000, 84; Figures 4, 5). The chalets and cottages in Mantuma were constructed in 1979 and 1980, and the 13 safari tents are the most recent addition and were erected in 1992 (Beyer and Duggan, 1997, 162; Gush, 2000, 86). The rest huts originally conformed to the arrangement which was common in rest camps managed by the Natal Parks, Game and Fish Preservation Board (later shortened to Natal Parks Board) game and nature reserves. Tourists brought their own groceries but had their meals prepared by male staff members in a communal kitchen and delivered to their huts on aluminium trays (Pooley and Player, 1995, 188). The rest huts are the only accommodation units in Mkhuze that do not have en-suite bathrooms, but are provided with crockery and cutlery and include a fridge and kettle (Figure 4). Tourists who stay in the rest huts, and who wish to cook meals, need to make use of the communal kitchen, sans cooks and waiters.



Map 3: Layout of Mantuma Camp, Mkhuze Game Reserve
Source: Adapted from Google Earth images



Figure 2: A rudimentary cottage constructed in 1934 on the occasion of a visit by the Governor General and Lady Clarendon to the game reserve Source: Gush, R. (2000)



Figure 3: The first three rest huts at Mantuma were constructed in 1959 Source: Gush, R. (2000)



Figure 4: Exterior of the 2-bed rest hut at Mantuma Camp, Mkhuze Game Reserve, which were completed in 1961
Source: Author's own



Figure 5: Interior of a rest hut at Mantuma Camp, Mkhuze Game Reserve Source: Author's own



Figure 6: The 8-bed Nhlonhlela Bush Lodge consists of four reed-and-thatch huts situated on a hill overlooking Nhlonhlela Pan Source: Author's own



Figure 7: Interior of a hut at the Nhlonhlela Bush Lodge Source: Author's own



The completion of the 13 safari tents brought the total number of beds available at Mantuma to 84 (Map 2, 3). The 8-bed Nhlonhlela Bush Lodge, situated 4 kilometres east of Mantuma, overlooks the Nhlonhlela Pan and was completed in 1991 (Gush, 2000, 146; Table 1). As in the case with the accommodation at Mantuma, there is no fence surrounding the bush lodge (Figure 6).

Methodology

Visitor statistics for 2017 were obtained from EKZNW's Apex system and analysed in terms of unit occupancy and bed occupancy rates. The relative contribution of each category of accommodation to total sales was computed and compared to the availability of bed nights (Figures 9, 10). The average occupancy rate for each of the seven categories of accommodation was computed and the results were plotted on graphs.

The relative contribution of accommodation indicates that the 2-bed safari tents and 4-bed chalets account for 22% of hatted accommodation in Mkhuze, with 20 beds each (Table 1). The 4-bed tents, six 2-bed rest huts and 6-bed cottages account for 13% each of available accommodation, and the Nhlonhlela Bush Lodge for 8.5%. The four 2-bed chalets account for the remaining 8.5% of accommodation (Table 1; Figure 9).

Table 1: Hatted accommodation in Mkhuze Game Reserve

Accommodation Category	Number of units	Number of beds	Total number of beds
Rest huts	6	2	12
Chalets	4	2	8
	5	4	20
Cottages	2	6	12
Safari tents	10	2	20
	3	4	12
Nhlonhlela Bush Lodge	4	8	8
Total	34		92

Results – Tourist preferences

The rest huts are the cheapest accommodation at Mantuma at \$20.16¹ per person per night (pppn) and the most expensive category is the bush lodge at \$42 pppn. The safari tents are the second cheapest category of accommodation and the rate pppn is identical for the 2-bed or 4-bed tents, as is the tariff pppn for the 2-bed and 4-bed chalets.

A factor that must be considered is that EKZNW charges a minimum rate for each category of accommodation. For the rest huts the minimum tariff is for one person, and for the remaining 2-bed units the minimum tariff is for two visitors. If a single visitor books a 2-bed unit, then the overnight charge levied is for two people. For all the 4-bed units the minimum tariff is for three visitors, it is four for the 6-bed cottages and six for Nhlonhlela Bush Lodge. It is suggested that apart from cost considerations, these minimum rates are exerting an influence on the occupancy rates of the larger accommodation units. Further research is needed here, but it would appear that the average size of a party of visitors is less than six people.

Porter argues that *cost leadership* and *differentiation* are two common business strategies which ensure business success (Porter, 1985). Within each of these strategies it is possible to have a particular focus, i.e. *cost focus* or *differentiation focus*. Thus, a luxury car manufacturer can bring out a cheaper version of one of its vehicles to attract customers who would normally be outside of

¹ Exchange rate as of 26 April 2018



the reach of the company's products. Likewise, a supermarket can import cheese and wine and, by using such a *differentiation focus*, attract customers who would normally shop only at high-end stores (Hay-Davidson, 1987, 4).

In the example of Mkhuze Game Reserve, because it is a state-run entity that is subsidised by the taxpayer, the focus best fits Porter's strategy of cost leadership, with a *differentiation focus* in the case of the Nhlonhlela Bush Lodge.

This assessment is supported by an analysis of the contribution made to bed nights sold by the various categories of accommodation. The percentage of bed nights is expressed below with the contribution to overall unit nights sold indicated in brackets (Figures 9,10). The occupancy rate for the accommodation categories is shown in Figure 11.

The highest occupancy rate was achieved by the 2-bed chalets at 68.4%. This category of accommodation comprises 8.5% of available accommodation, but accounted for 16.5% of the unit nights booked. The six rest huts, which are the cheapest accommodation available, performed well and accounted for 22.2% (13%) of bed nights sold (Figures 9, 10). The affordable, two-bed safari tents contributed 28.5% (22%) of unit nights sold.

The 4-bed accommodation units did not fare as well, which is possibly an indication of the average size of a visiting party. For the 4-bed chalets the contribution was 15.5% (22%) and for the 4-bed safari tents 9.5% (13%). The two 6-bed cottages only generated 5.7% (13%), and Nhlonhlela Bush Lodge only 2% (9%) of all unit nights sold. However, the 6-bed cottages offer a discount for the 5th and 6th visitor, as 80% of the tariff charged is for the first four visitors and subsequent visitors are discounted. The two 6-bed cottages are only 8% more expensive than the 4-bed chalets are for four visitors, but had a unit occupancy rate that was 8% lower (Figure 11).



Figure 8: Overnight rate for hutted accommodation in Mkhuze Game Reserve

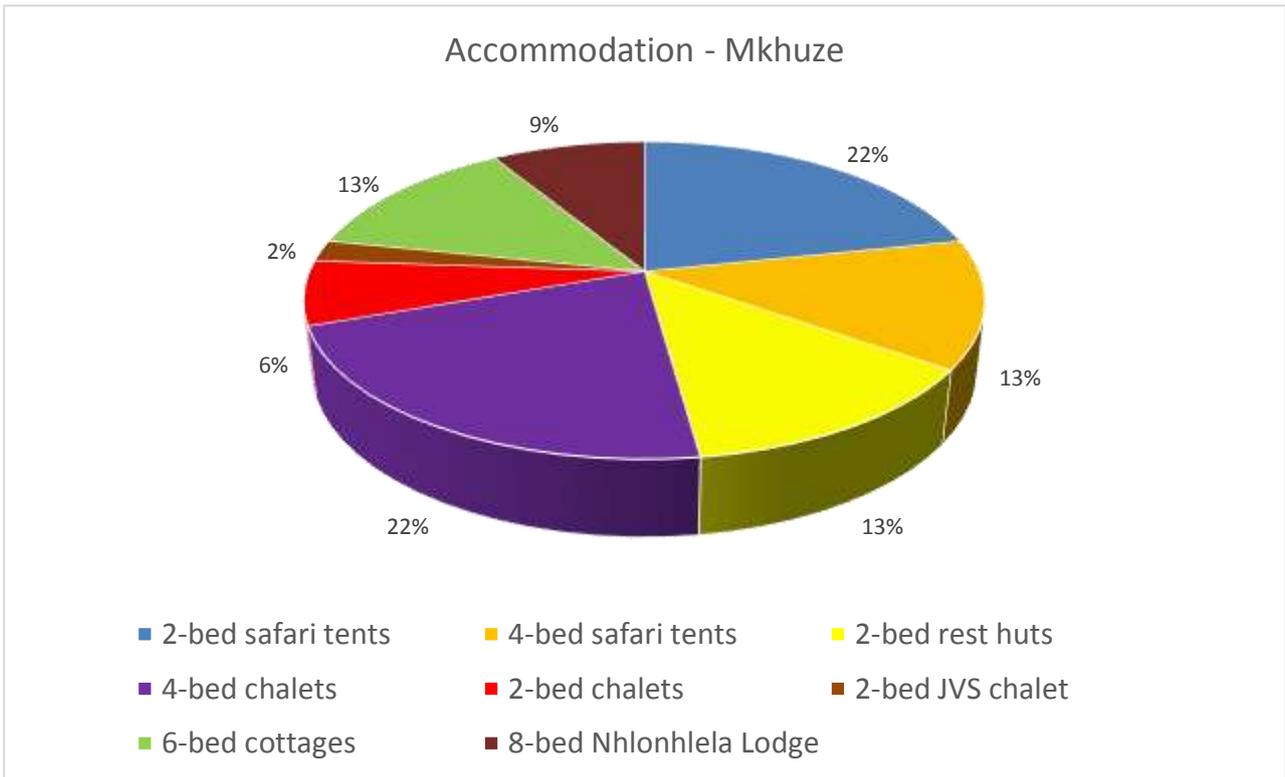


Figure 9: The relative contribution of hutted accommodation category to total beds available

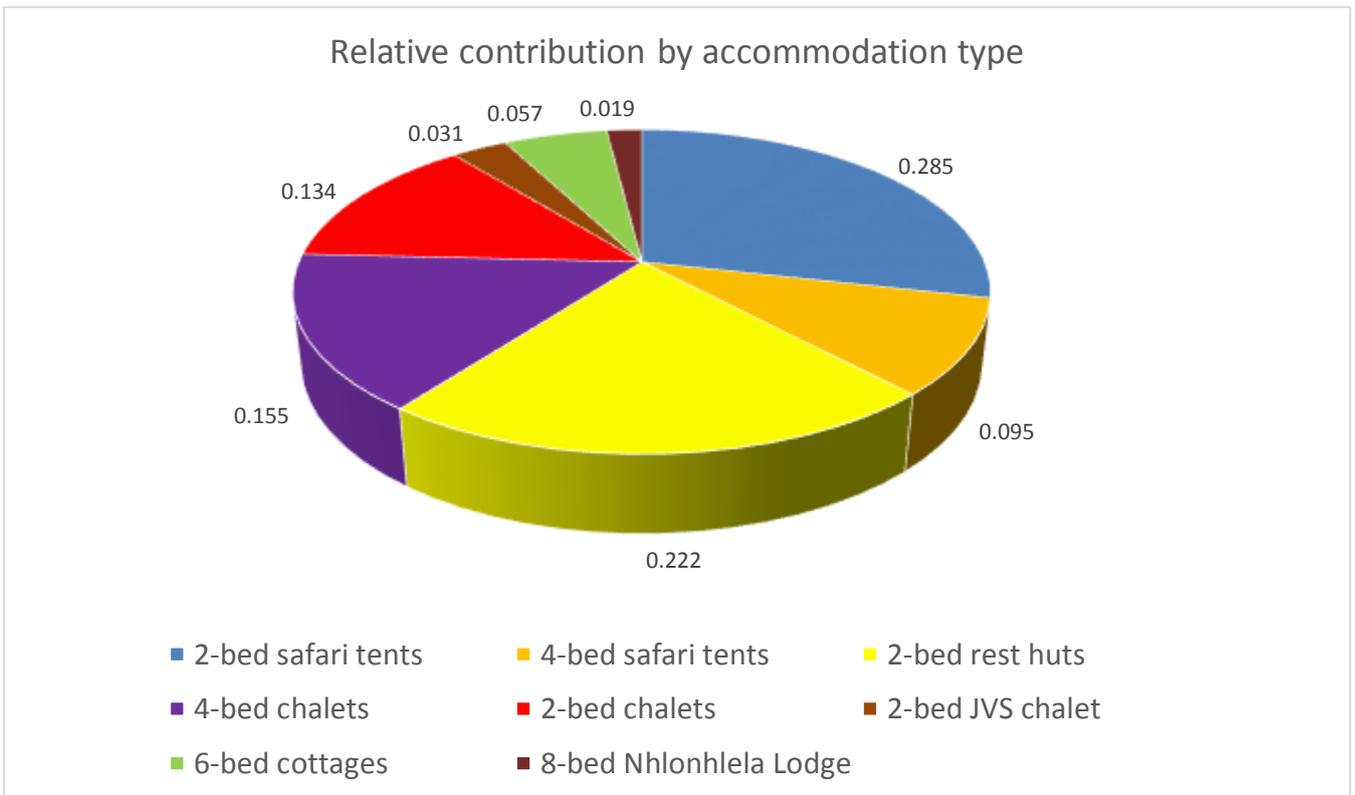


Figure 10: Proportion of unit nights sold by hutted accommodation category



Although the rest huts account for the same percentage of hatted accommodation as the 4-bed safari tents and 6-bed cottages, the rest huts had a unit occupancy rate of 60% compared to 48% and 44.3% respectively for the 4-bed safari tents and 6-bed cottages.

The 2-bed cottages are amongst the most expensive category of accommodation available within Mantuma, excluding Nhlonhlela Bush Lodge which is situated 4 kilometres to the east, and recorded the highest occupancy rate of 68.4% (Figures 8, 11).

The 2-bed and 4-bed chalets are situated in the same section of the camp, however there was a marked difference in unit occupancy rates of 68.4% as opposed to 52.5%. It should be noted that this section of the camp could be considered “less natural” than, for example, the safari camp section, where the units are far apart and surrounded by dense vegetation (Map 2, 3).

The cottages are served by a circular tarred road, they are equipped with satellite television and are situated across the road from the Rhino Dine-O take-away (Figures 15, 18). They therefore offer a measure of convenience, comfort and modernity which, in this case, it would appear is more important to tourists than a more authentic “bush experience.”

Although the 2- and 4-bed safari tents have been carefully positioned in the bush and afford a high degree of privacy (Map 3, Figure 13), and each tent is equipped with an en-suite bathroom and separate kitchen, this category of accommodation only showed an occupancy rate of 45.4% and 48% (Figure 11). The safari tents are also the newest accommodation category available at Mantuma. Given the quality of the experience offered by the safari tents, the occupancy rate appears to be surprisingly low.

The average number in each group of tourists who selected to stay in the 2-bed units is 1.9 in the case of the 2-bed chalets and 2-bed safari tents, and only marginally lower at 1.78 for the rest huts. (Figure 12). The rest huts are the only category of accommodation in Mkhuze where the base rate is for a single tourist, so the result suggests that, despite this, very few tourists visit Mkhuze on their own and for 89% of stays there were two visitors in each rest hut.

The accommodation unit with the lowest occupancy rate is the Nhlonhlela Bush Lodge (Figure 11) even though it is one of the newest categories of accommodation and occupies a high vantage point overlooking a pan. The bush lodge had an occupancy rate of 38% and the minimum charge per night is for six tourists.

Unlike the other accommodation categories, the huts at Nhlonhlela are provided only with double beds, which will also exert an influence on the nature of a party that will choose to reserve the lodge. Relationship marketing, such as linking the lodge with a known tour operator, could increase the occupancy rate for this facility, but it is going to be difficult to accommodate parties of tourists who are not immediate family members given the current sleeping arrangements. It is significant to note that the average party size for the bush lodge was 6.9 tourists, which exceeds the base rate of six people, and eight people occupied the bush lodge for 86% of visits (Figure 12).

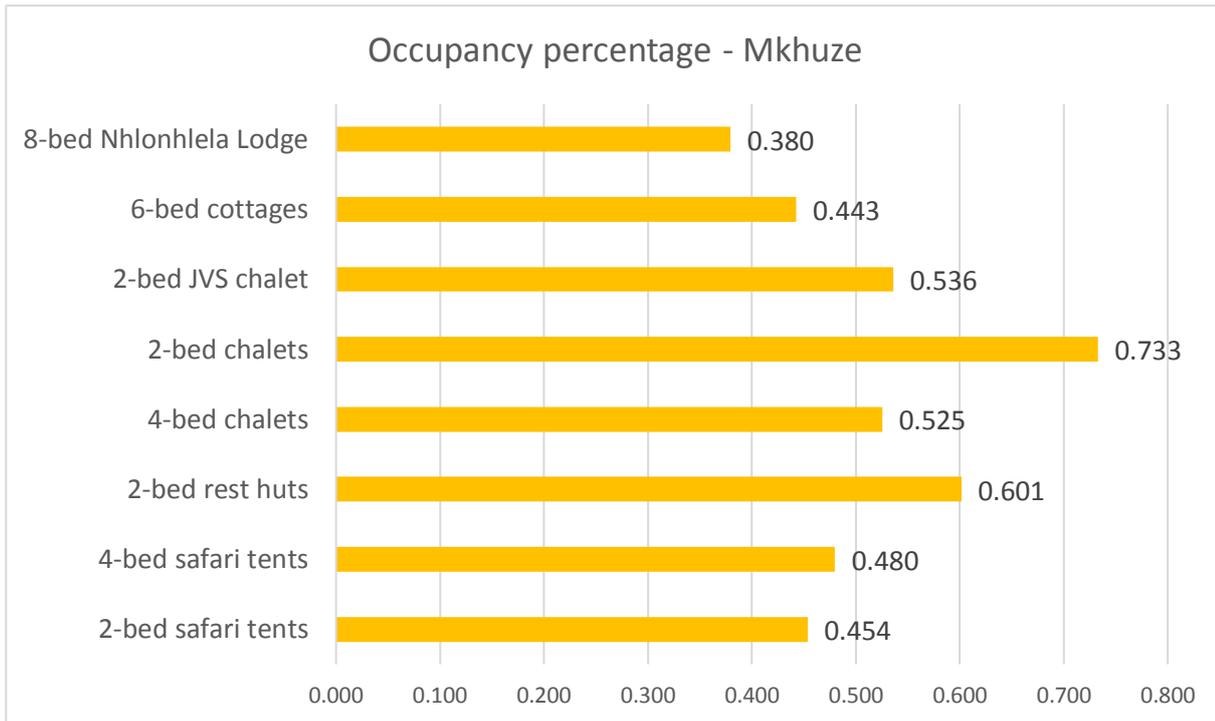


Figure 11: Unit occupancy rate for hutted accommodation in Mkhuze Game Reserve

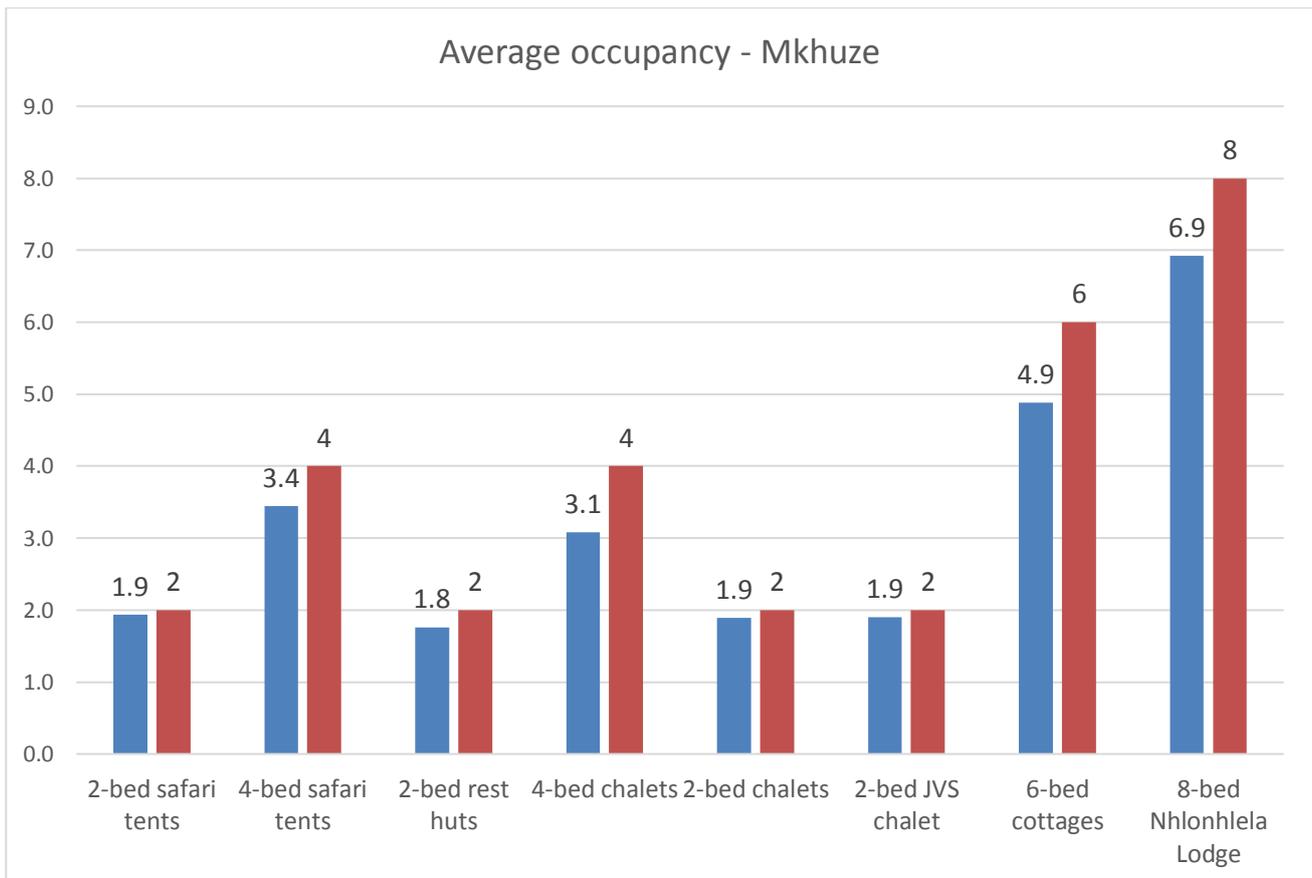


Figure 12: Average unit occupancy rates and capacity of hutted accommodation at Mkhuze Game Reserve



Discussion - Changing tourist preferences

The first rest camp in a Zululand game reserve was completed in 1934 in Hluhluwe Game Reserve (Pooley & Player, 1995, 20, 105). The Natal Parks, Game and Fish Preservation Board (later shortened to Natal Parks Board) was established in 1947 to administer the provincial game and nature reserves in the province of Natal (Pooley and Player, 1995, 21).

In the 20th century political rivalry between the three Afrikaner-controlled provinces of South Africa and the only English-controlled province of Natal was expressed in a number of ways, conservation not being the least of these. A longstanding rivalry existed between the Natal Parks Boards and the National Parks Board (now SANParks), which was underpinned by political ideological differences and the domination of the Natal Provincial Administration by the opposition United Party. This was expressed by frequent government attempts to abolish the Zululand game reserves or attempts to hand them over to the National Parks Board (Pringle, 1982, 143; Pooley & Player, 1995, 22).

In 1949, one year after the victory of the National Party, the national parks, which covered nearly 3 million hectares, received a government subsidy of £14,000 per annum compared to the £56,000 granted by the Natal Provincial Council to the provincial reserves in Natal, which covered only 205,000 hectares at the time (Pringle, 1982, 218).

In the decades after 1948, the Natal Parks Boards resisted all attempts at what was termed “commercialisation”. Tourists had to bring all their supplies to a game reserve and could not buy anything in the rest camp, except for curios. The contradictions implicit in a policy that permitted the selling of carved wooden animals and game skins, but refused to sell bread and milk were apparently lost on the policy makers within the organisation.

This prevailing view within the Natal Parks Board was well summed up by Ken Tinley in a book edited by Ian Player, who was a prominent prophet of the wilderness movement: Tinley (1979) decried the fact that many conservation organisations, “have based their activities on the dogma that tourism and wildlife conservation are two sides of the same coin. Thus staff and funds are used mostly for catering and tourist facilities and the natural areas become filled with urban nuclei to justify the existence of parks. In this way conservation departments continue to be directly responsible for despoiling the last wild places for which they are custodians” (33).

There was also strong resistance to tarring roads within the Natal game reserves, and tarred roads and restaurants in the Kruger National Park were contemptuously regarded as manifestations of “commercialisation”, which had to be combatted. One of the stated management objectives of the Natal Parks Board for the Zululand game reserves was to, “create, through a planning and management strategy, an environment for public use and enjoyment that identifies as closely as possible to that which existed before the advent of European influence in Zululand and to provide for public activities consistent with this environment and with its conservation” (Natal Parks Board, 1989, 3). The provision of tourist facilities in an environment that had to conform to a pre-colonial gaze, would obviously preclude all trappings of modernity such as restaurants and tarred roads.

The completion in 1990 of the 168-bed Ntshondwe Camp in Ithala Game Reserve, and the expansion in 1993 of Hilltop Camp, Hluhluwe, to 174 beds, which included a large building incorporating a reception area, offices, store, kitchen, restaurant and pub, marked a major departure from this policy. Modernity, indeed, has proven to be a force that was hard to resist and tarred roads now lead to 12 EKZNW rest camps.

Porter (1985, 7) stated that industry structure is relatively stable but can change over time as an industry evolves. Visitors have been travelling to protected areas in South Africa since 1927, and



Figure 13: Exterior of a 2-bed safari tent at Mantuma Camp, Mkhuzi Game Reserve Source: Author's own



Figure 14: Interior of a 2-bed safari tent at Mantuma Camp, Mkhuzi Game Reserve Source: Author's own



Figure 15: A 4-bed chalet at Mantuma Camp, Mkhuzi Game Reserve Source: Author's own



Figure 16: Interior of a 4-bed chalet at Mantuma Camp, Mkhuzi Game Reserve Source: Author's own



Figure 17: One of the two 6-bed cottages at Mantuma Camp, Mkhuze Game Reserve Source: Author's own



Figure 18: The Rhino Dine-O take-away is situated in a circle surrounded by the chalets in Mantuma Camp, Mkhuze Game Reserve Source: Author's own



the preference for accommodation, which includes modern amenities such as television, is certainly a departure from earlier purist views.

As early as the 1940s, Skukuza in the Kruger National Park, “with its post office, store, kitchen and bathrooms”, was referred to by some visitors as “a metropolis” (Carruthers, 1995, 77). The view that tourist facilities should only be “functional, efficient and minimal”, was certainly not a minority view amongst protected area managers for many decades (Stevenson-Hamilton, 1937, 249, 250, 252; Carruthers, 1995, 78).

While the results of this study reveal that tourists are certainly not avoiding the oldest accommodation in the camp, with its communal kitchen and bathroom, nevertheless, despite the price difference between the rest huts and the 2-bed chalets, many tourists are opting for the slightly more expensive option (\$38.64 as opposed to \$20.16 pppn). Future research is going to investigate whether there are substantial differences between the accommodation preferences of domestic tourists and foreign tourists.

Gush (2000) stated, “the accommodation provided, from the very first rustic camp to the bush camps has undergone great changes over the years but it has all been very successful. Quite a number of Mkhuze’s older visitors though have a great affection for the original camp with its six huts and outside ablutions and often choose this accommodation above any other on offer” (87).

Although tourists are showing no sign of avoiding the older and cheaper accommodation units, the units that contain additional amenities maintained a higher occupancy rate. Analysis of unit occupancy rates suggest that cost remains an important consideration for the type of tourist that Mkhuze “has chosen to serve” (Porter, 2015). While the section of the market which is attracted to Mkhuze is concerned with cost, accommodation categories which include television and are close to the camp take-away achieved the highest occupancy rate. The accommodation units which provide a more authentic “close to nature” experience, and include an en-suite bathroom and private kitchen, surprisingly, recorded low occupancy rates in comparison with other accommodation categories.

This suggests that tourist preferences are changing over time, and facilities, which were at one time considered to be incompatible with protected areas, are increasingly becoming desired by tourists. The *differentiation focus*, in the example of the bush lodge, recorded a low occupancy rate which is probably due mainly to the current tariff system, where the minimum charge for the facility is for six people, and does not suggest that this focus has failed. Does this suggest that EKZNW needs to reconsider the needs of the customer it has chosen to serve?

At present EKZNW receives 70% of its annual budget as a subsidy from the provincial government, compared to a government subsidy of 25% in the case of SANParks for a budget that is 2.4 times larger (SANParks, 2017, 145; Mngoma & Mbanjwa, 2018). There are increasing socio-economic pressures on government to reduce subsidies to conservation agencies. The logical question that should be asked is: can a state-aided conservation agency pursue a *differentiation focus*? This focus is being applied in national parks in Botswana, Kenya and Tanzania, where entrance fees and accommodation rates are aimed at an affluent foreign market, which is referred to as the high-value, low-density segment (HVLN) (World Bank, 2015, 4). Could state-run protected areas adopt a *differentiation strategy*, with a *cost leadership* focus for domestic tourists, to increase revenue?

Motau and Wale (2018) argue that EKZNW needs to appeal to new markets (*differentiation focus*) in order to increase revenue. However, such a shift in strategy is not without its risks as, “by upgrading accommodation facilities and its product offering, EKZNW could provide better services which would increase its revenue and ultimately improve its operational competitiveness. However, this will require major investment from the government, which will prove difficult given the current economic climate and will also depend on whether the supply of facilities in a public protected area will match visitor demand” (14).



Conclusion

The essence of Porter's theory of competitive strategy is the need for each company to create uniqueness. Porter (2015) says that the idea that there is "a best" in any industry is a misnomer as the essence of business success is to create uniqueness. The chosen competitive strategy is a means by which a company will create uniqueness. By creating uniqueness a company will succeed, and a competitor can also succeed as they will be creating uniqueness for a different set of customers. This situation Porter refers to as "a positive sum competition" (Porter, 2015).

The six game-viewing hides at Mkhuze afford tourists the opportunity to view relatively-rare species, such as nyala, at close quarters and have become well-known throughout the world over the past 58 years (Gush, 2000). The far larger Hluhluwe-iMfolozi Game Reserve (96,453 hectares) has three of these structures, and the location, ambience and game-viewing opportunities offered by the Mkhuze hides has certainly created uniqueness. Gush (2000) detailed the history of the hides and states, "a visit to which have become synonymous with a visit to Mkhuze" (87).

In addition, it is argued that a high degree of authenticity, as seen in the seamless transition between bush and rest camp, as well as the guided Fig Forest walk and other activities, has enabled Mkhuze to establish its own uniqueness in the competitive ecotourism market and for the customer it has chosen to serve.

Another important factor which has created uniqueness, is the second highest bird tally for any protected area in South Africa, which results from the game reserve's diversity of vegetation communities and the expansive Nsumu Pan. In recent decades bird watching has become a major niche market in tourism. The Department of Trade and Industries estimated in 2009 that avitourism in South Africa, including both local and foreign bird-watchers, generates between \$77.8 to \$101 million annually (Department of Trade and Industries, 2010, 9). Porter (2015) maintains that the essence of business success is the ability to offer a unique product in a competitive market. Given the fact that there is a plethora of state- and private- game reserves in northern KwaZulu-Natal, this assertion is of great relevance to the industry. Which strategy should a small private game reserve adopt to compete against a much larger next-door neighbour? How does a game reserve like Mkhuze create uniqueness which will enable it to compete against a well-branded and internationally renowned game reserve such as Hluhluwe-iMfolozi? What influence does customer loyalty, and repeat visits, have on tourist numbers and the resultant business success? Can relationship marketing ensure the success of a player in the industry? And what is the essence of being unique in the ecotourism industry?

Future research will compare how Mkhuze competes with adjoining private game reserves in the region in terms of customer satisfaction. It will also seek to determine which niche markets are being served by state-run and private protected areas, and whether it is, indeed, possible in the ecotourism industry to be truly unique.

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