

The 2014/15 financial year registered growth of 2% in the number of accommodation unit nights booked by the Senior South African market segment compared to the previous financial year, realising growth of 11,1% in the value of these bookings to over R85.5 million. Camping site nights sold to Senior South Africans increased by 7,1% in the same period, with value from such camping bookings growing by 19,1% to R14.5 million. In total, the value of reservations for accommodation and camping made by Senior South Africans exceeded R100 million for the first time in the 2014/15 financial year (compared to R51 million in 2009 before the first changes were implemented).

Several other initiatives during 2014/15 yielded good results and included short notice discounts on distressed inventory and special tariffs for low season wilderness trails undertaken in Kruger National Park.

### UNIVERSALLY ACCESSIBLE TOURISM

Universal Access in Tourism Protocols, Guidelines, Implementation Plans and a History and Status Report were completed during the 2014/15 financial year for application throughout SANParks Tourism Plant, and flowing from the Responsible Tourism Strategy 2022.

Broadly, the Universal Access protocols and guidelines will:

- Strengthen SANParks' commitment to providing universal access.
- Give the respective park managers the direction to follow and guidance on how to ensure their parks comply with the standards of universal accessibility.
- Define the areas which SANParks must focus on in order to achieve a level of universal accessibility that caters for all tourists regardless of their intellectual, physical or sensory capacity.

SANParks generally has a good reputation in the Disability Travel Market in terms of providing access, but application of protocols and guidelines will elevate universal access and push parks to go further to ensuring all people can experience the parks.

In 2014/15 SANParks continued with its active market penetration and involvement with disability travel industry forums and platforms and regularly hosted individuals, organisations and schools for people living with disabilities.

Universal Access Audits were conducted in Addo Elephant and Table Mountain National Parks as part of the responsible tourism planning process.

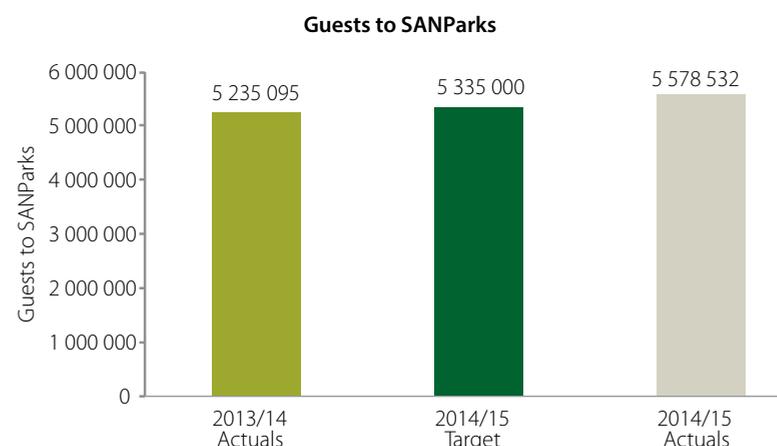
### TOURISM STATISTICS

Of relevance to the 2014/15 tourism performance figures, the following significant differences impacted on comparisons to the previous year:

- The 2013/14 financial year included no Easter Weekend.
- The Kruger National Park was affected by severe flooding during January 2013 necessitating the closure of several camps and gates due to flood damage, inaccessible roads and service disruptions. Sirheni was fully operational again from June 2013 while all accommodation and camping units at Shingwedzi was available again by mid-September 2013.
- Maintenance work to the Agulhas Light House commenced on 4 February 2013 and it re-opened to visitors on 10 December 2013.
- The Table Mountain Aerial Cableway was closed for maintenance for a five week period from 22 July to 25 August 2013 (the annual closure normally spans only two weeks).
- Heavy rains and localised flooding during March 2014 saw precautionary, temporary closures of several facilities at Kruger and Marakele National Parks while the increased flow of the Orange River attracted an influx of visitors to the Augrabies Falls National Park.
- The Larus Houseboat at West Coast National Park has been out of commission since May 2014.
- Huge sections of the Table Mountain National Park suffered considerable fire damage early in March 2015, preventing tourists access to these areas.

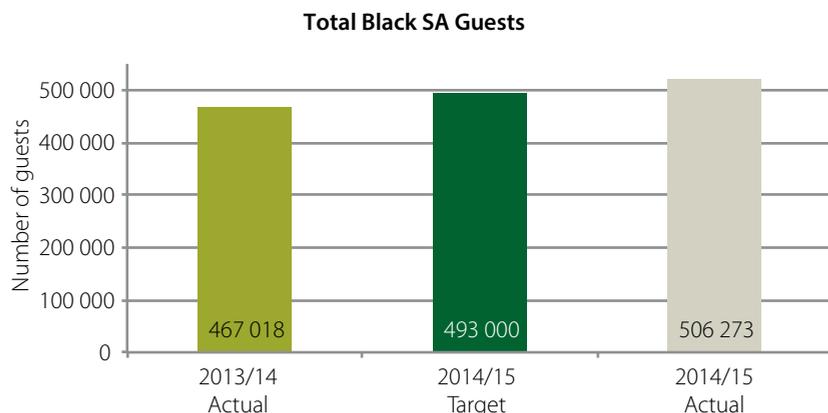
### Guests to National Parks

For the period under review, total Guests to Parks increased by 6,6% from 5 235 095 to 5 578 532 persons through SANParks gates. For Kruger the number increased by 6,6% from 1 556 916 to 1 659 793 and for Parks increased by 6,5% from 3 678 179 to 3 918 739 persons.



## Black South African Guests

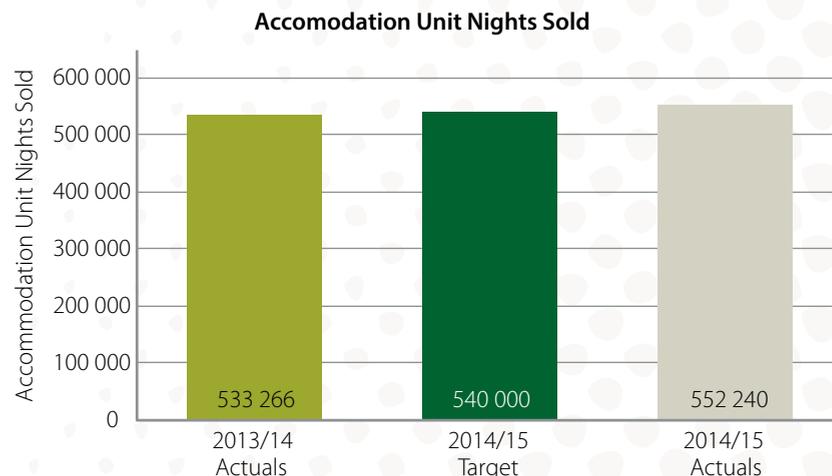
For the 12 month term, total Black guests increased by 8,4% from 467 018 to 506 273 comprising an increase of 9,7% from 424 489 to 465 689 in Day Visitors and a decrease of 4,6% from 42 529 to 40 584 in Overnight Guests. Black guests comprise a total of 32,1% (previous year 32,9%) of Total South African Day Visitors and 8,0% (previous year 8,6%) of Total South African Overnight Guests. The total Black guests (day visitor and overnight) comprise 25,9% (previous year 26,1%) of Total South African Guests.



*NOTE: Due to the way in which the South African demographic figures are collected and captured, SANParks is aware and accepts that there may be a small margin of error involved and that these figures may not be 100% accurate. This does not diminish the value of these measures in indicating trends in Park visitation by South Africans. Please note that the Table Mountain and West Coast National Parks are excluded from reporting of this category, as demographic information is not captured there.*

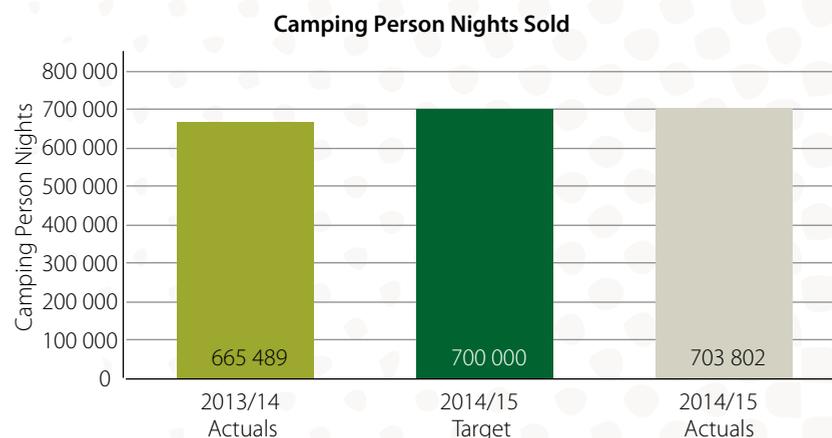
## Accommodation Occupancy

The average Unit Occupancy for the period under review was 72,1% (last year 70,9% (+1.1)) comprising 60,5% (last year 58,2% (+2.3)) for Parks Division and 78,7% (last year 78,4% (+0.3)) for Kruger Division.



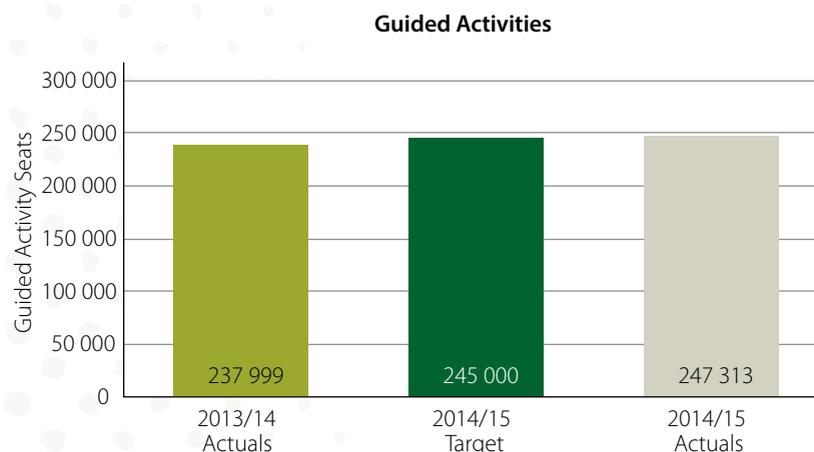
## Camping

For the period under review, Camping Person Nights Sold is up by 5,8% from the previous year from 665 489 to 703 802 person-nights. In the case of Parks Division, Camping Person Nights Sold are up by 7,5% from 254 363 to 273 531 person-nights, while Kruger Division increased by 4,7% from 411 126 to 430 271 person-nights.



## Guided Activities

For the period under review, the Activity statistics show an overall increase of 3,9% from 237 999 to 247 313 activities across SANParks with Kruger showing an increase of 5,0% from 157 874 to 165 801 activities and Parks showing an improvement of 1,7% from 80 125 to 81 512 activities. A total of 67,0% of all SANParks activities were performed in the Kruger National Park, compared to 66,3% (+0.7) for previous year.



### Summary of Tourism Statistics for the 12 months ended 31 March 2015 for the South African National Parks

PARK	ACCOMMODATION (EXCL CAMPING)				CAMPING			GUESTS TO PARK	TOTAL ACTIVITIES
	UNIT NIGHTS SOLD	UNIT OCCUPANCY	BED NIGHTS SOLD	BED OCCUPANCY	SITE NIGHTS SOLD	CAMP SITE OCC	PERSON NIGHTS SOLD		
ADDO	27 498	86,7%	61,646	71,0%	9 389	77,9%	24 937	204 881	27 680
AGULHAS	2 795	34,9%	7,767	30,1%	NOT APPLICABLE			27 206	NOT APPLICABLE
AUGRABIES	9 370	46,1%	19,693	41,7%	5 098	27,9%	14 540	69 990	1 464
BONTEBOK	2 322	48,9%	5,597	31,9%	2 636	17,6%	7 121	17 611	NOT APPLICABLE
CAMDEBOO	865	59,4%	1,657	56,9%	2 059	37,6%	4 916	37 326	NOT APPLICABLE
GOLDEN GATE	19 224	35,6%	41,900	26,9%	4 715	28,7%	13 291	55 001	527
GARDEN ROUTE	32 560	62,9%	76,481	52,5%	22 810	19,1%	67 655	376 458	15 145
KAROO	10 081	73,8%	25,054	50,4%	5 661	64,9%	13 822	38 618	1 359
KGALAGADI	31 436	89,4%	72,414	69,7%	22 063	78,0%	63 501	40 086	5 387
KRUGER	383 569	78,7%	923,310	61,8%	157 419	66,9%	430 271	1 659 793	165 801
MARAKELE	2 952	74,0%	6,964	50,5%	6 453	45,7%	17 541	23 926	1 397
MAPUNGUBWE	5 596	56,0%	13,185	49,1%	2 357	64,6%	6 478	35 900	22 383
MOKALA	6 931	61,3%	15,334	49,4%	1 838	45,8%	4 874	17 626	1 160
MOUNTAIN ZEBRA	6 065	79,1%	15,442	49,2%	3 989	54,6%	10 177	24 426	2 508