

The Economic Geography of South Africa's International Tourism Industry

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Abstract: The business of international tourism is a growth industry and key driver for economic development in many countries. For national and local policy makers the attraction of international tourists is of major importance for economic and social development. Understanding the flows and impacts of international tourism is a vibrant issue in global tourism scholarship. Although the global flows of international tourism are well documented, much less understood are the spatial patterns of international tourists within national territories. The objective in this paper is to analyse scientifically the overall economic geography of international tourism flows in South Africa. An uneven geographical pattern of development of international tourism is disclosed for the period 2001-2012. In interpreting this spatial distribution it is argued that a conceptual distinction be drawn between the different mobilities of South Africa's cohorts of long haul as opposed to regional African visitors. The economic geography of international tourism in South Africa is a composite of these two sets of visitors and of their differential flows variously for purposes of leisure, business and VFR travel.

Keywords: international tourism; uneven development; spatial inequalities; economic geography

JEL Classification O18; Z32; Z38

1. Introduction

As measured by data on international arrivals and receipts, the business of international tourism represents a growth industry and key driver for economic development in many countries. According to Jenkins (2015) for the past six decades international tourism has experienced a trajectory of continued expansion and diversification to emerge as one of the largest and fastest growing sectors of the global economy. During the past 20 years alongside the traditional destinations of Europe and North America the range of destinations impacted by international tourism has expanded considerably. The United Nations World Tourism Organization (UNWTO) asserts that an ever-increasing number of countries "have opened up and invested in tourism, turning it into a key driver of socio-economic progress through the creation of jobs and enterprises, export revenues and

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infrastructure development” (UNWTO, 2016, p. 2). Forecasts undertaken by the UNWTO point to continued growth from a total of 1.186 billion international tourists in 2015 to a projected 1.8 billion for 2030. This said, it is observed that there is an uneven development of international tourism between continents, countries and regions.

For tourism scholars the multiple issues around the growth and impacts of the development of international tourism have sparked a substantial research interest. Much scholarly work has focussed upon questions of international tourism demand forecasting (Peng et al., 2014; Smeral, 2014; 2015; Wang, 2014). Destination development and the impacts upon economic growth of expanding international tourism are explored in a number of different country investigations (Akkermik, 2012; Henderson, 2017). Issues around the sophisticated management of international tourism, including marketing, research and innovation, have also come under scrutiny (Witt et al., 2013). Another vital emerging focus of research on international tourism concerns its ramifications for climate change and of the corresponding importance for destinations to develop low-carbon tourism economies (Becken, 2013; Gössling & Schumacher, 2010; Gössling et al., 2013; Ismail & Rogerson, 2016; Kaenzig et al., 2016; Rogerson & Sims, 2012; Rogerson, 2016; Scott et al., 2012). A further new focus surrounding international tourism is the impacts of terrorism (Morakabati & Beavis, 2017; Onuoha, 2016).

Although the majority of scholarship around international tourism centres upon countries of the global North Christian (2016) points out that, at least since the 1970s, the growth of tourism to destinations in the global South has attracted a stream of academic writings¹. Among classic works examining the critical developmental impacts of international tourism in developing countries are those by De Kadt (1979), Britton (1982), Brohman (1996) and Harrison (1994). This said, there is recognition that many countries in the so-termed global South are emerging as increasingly important sources (as well as destinations) for international tourists. In particular, countries such as India and China are becoming significant regional drivers of tourism (Jenkins, 2015; UNWTO, 2016). Cohen and Cohen (2015) draw attention to the growth of international tourism from what they term “emerging world regions”. Indeed, it is highlighted that outbound tourism flows in Asia, the Middle East, Latin America and sub-Saharan Africa are primarily intra-regional in character (Ghimire, 2001; Rogerson, 2004; Rogerson & Kiambo, 2007; Winter et al., 2009).

As argued by Kang et al. (2014, p. 793) “tourism is at its very core a distinctly geographical phenomenon, involving the movement of tourists from one place – their places of origin or generating regions – to one or more destinations via a complex web of multimodal transportation networks”. The spatial patterns of

¹ See e.g. (Deichmann & Frempong, 2016; Ezeuduji, 2013).

tourism supply and demand has long been a core focus of research by geographers involved in the analysis of tourism (cf. Pearce, 1979). The spatial differentiation of the impact of international tourism is recognised as a question of critical significance particularly for policy-makers in the developing world. For economic geographers the uneven development of tourism is one of the contributory factors for observed spatial inequalities in the developing world as a whole. Informed by a dependency theoretical perspective and using the case of Fiji, Britton (1980; 1982) contends that the international tourism industry in a peripheral capitalist economy is typically monopolistic and responsible for shaping a neo-colonial structure geographically characterised by the concentration of international tourism in isolated resort enclaves. For Botswana Mbaiwa (2005) charts how the patterns of international tourist flows are geographically concentrated in an enclavic fashion.

As argued by Ahebwa and Novelli (2014) an improved understanding of the spatial distribution of tourism can lead to better informed national policies. In many countries the promotion of tourism is a component also of place-based *local* development planning (Rogerson, 2014). Arguably, Li et al. (2016, p. 97) stress that “tourism spatial polarization which is treated as enlarging the existing inequalities, is mainly correlated with international rather than domestic tourism”. This finding of the concentrated character or enclave nature of international tourism is supported also by research findings reported from variously China, Spain, Italy and Turkey (Cortes-Jiminez, 2008; Goh et al., 2015; Li et al., 2016). In Turkey Tosun et al. (2003) demonstrate that the introduction of international tourism as a growth strategy promoted coastal enclaves of mass tourism which increased the nation’s regional disparities. Likewise, in China the expansion of inbound international tourism has been highly concentrated geographically in particular regions of the country and once again exacerbated spatial inequalities (Goh et al., 2014; Wen & Singha, 2009). Against this background scholarship, the rationale of this paper is to expand our understanding about the spatial patterns of international tourism by examining the geographical footprint of international tourism in one developing country context, namely the case of South Africa. Over recent years an expansion in tourism scholarship has occurred in South Africa as is shown by several recent reviews (Hoogendoorn & Rogerson, 2015; Rogerson & Rogerson, 2011; Visser, 2016; Visser & Rogerson, 2004). Nevertheless, no detailed examination concerning the economic geography of the country’s international tourism sector so far has been undertaken for South Africa.

2. South Africa’s International Tourism Economy

Until the early 1990s international tourism was undeveloped in South Africa as the country suffered international sanctions and boycotts because of its apartheid policies (Rogerson & Visser, 2004). However, with the ending of apartheid and

democratic transition in 1994 South Africa experienced a major upturn in international tourism arrivals. Tourism has emerged as a critical sector on the policy agenda of the post-apartheid government (Department of Tourism, 2012). Major initiatives have been undertaken to grow South Africa's international tourism economy and increase its share in the overall economy of international tourism. According to Cornelissen (2005a) between 1995 and 2000 foreign tourism arrivals in South Africa recorded an average year-on-year growth of roughly 10 percent which was well above the 3% international average. Post- 2000 there has been a decrease in the rate of expansion of international tourism "largely due to the wearing off of the "Mandela syndrome" and international publicity on the high level of violent crime in the country" (Cornelissen, 2005b: 681). Between 1990 and 2004 South Africa's share of world tourism arrivals quadrupled which fundamentally changed the character of the country's tourism economy, not least with the establishment of an international standards accommodation sector (Greenberg & Rogerson, 2015; Rogerson, 2013a; 2013b). Notwithstanding the impacts of the 2008 global financial crisis an upturn in international arrivals was recorded for 2010 the year that South Africa hosted the FIFA World Cup. Since 2010, however, a downturn in international arrivals has occurred particularly from long haul markets for a mix of reasons including economic slowdown in source markets and South Africa's introduction of new restrictive visa regulations. During 2015 the total number of international tourist arrivals was estimated officially as 8.9 million (South African Tourism, 2016).

Patterns of international arrivals to South Africa indicate that, like other emerging world tourism regions, intra-regional travel flows dominate. On Table 1 is given the total numbers of international tourists and major purpose of visit for the leading 20 individual source markets for South Africa in 2015. A number of points are of note. Of the 8.9 million arrivals to South Africa almost three-quarters are from other sub-Saharan African countries, the most important being the neighbouring African land markets of Zimbabwe, Lesotho, Mozambique and Botswana. Other significant African source markets are Namibia, Zambia, Malawi, and Nigeria. The leading long haul source markers for South Africa's international tourism economy are United Kingdom, Germany, USA, France, Netherlands and Australia. Additional longhaul source markets of note are China, India, Canada, Italy and Switzerland.

Table 1. South Africa's Leading Source Markets for International Tourism and Major Purpose of Travel, 2015

Country	Number of Arrivals (2015)	% Leisure	%Business	% VFR
Zimbabwe	1900791	45.6	22.6	24.2
Lesotho	1394913	4.9	14.6	63.2
Mozambique	1200335	20.4	21.4	52.7

Swaziland	838006	16.6	15.0	54.6
Botswana	593514	16.3	27.5	36.8
United Kingdom	407486	39.1	23.7	30.7
USA	297226	50.6	22.0	13.8
Germany	256656	51.0	26.4	13.3
Namibia	212514	26.0	26.2	30.1
Zambia	161259	16.7	54.1	19.5
Malawi	135260	12.2	52.5	26.8
France	128438	45.7	32.5	12.3
Netherlands	121883	51.7	21.8	17.9
Australia	99205	39.4	15.4	40.8
China	84878	47.6	33.7	16.7
India	78385	15.0	63.0	16.6
Nigeria	59002	24.6	31.7	26.2
Canada	56224	54.5	20.4	16.5
Italy	52377	48.3	36.0	7.4
Switzerland	48510	52.2	22.8	14.7

Source: Adapted from South African Tourism 2016 Note: Bold font indicates a higher share than recorded for all international tourism arrivals.

Table 1 reveals analysis of country-specific differences in terms of the major purpose of travel of international tourists to South Africa. The purpose of travel is divided between the categories of leisure (which includes shopping for personal needs), business and visiting friends and relatives (VFR); the remainder is accounted for by other travel including (mainly) for health or religious reasons. It is observed that for the longhaul source markets of North America, Western Europe and China, leisure (holiday) is the major reason for travel to South Africa for its attractions of wildlife, natural beauty and beaches. In particular, for the major European markets South Africa is a popular holiday destination. In terms of leisure travel one exceptional case is Zimbabwe with 45% arrivals recorded for leisure purposes; this is explained by the fact that personal shopping is included in the category of leisure and that large numbers of Zimbabweans travel to South Africa simply to shop for goods that are unavailable in Zimbabwe because of the country's economic crisis. This means that the actual share of Zimbabwe visitors travelling to South Africa for holiday purposes is less than 10 percent of the total (South African Tourism, 2016).

It is revealed that business travel is an important segment of international tourism arrivals and in particular for India, Zambia, Malawi and Nigeria it is the prime driver for visiting South Africa (Ezeuduji, 2013). For many African countries cross-border trading is a critical element in business travel to South Africa, in particular from Zimbabwe, Mozambique, Malawi and Zambia. Finally, a substantial share of international arrivals in South Africa is for purposes of visiting friends and relatives or VFR tourism. The highest levels of VFR tourism are recorded from the proximate

countries of Lesotho, Swaziland and Mozambique; in the case of landlocked Lesotho which is surrounded by South Africa the VFR share is almost two-thirds of arrivals. Beyond Africa, however, VFR is an important driver for travel from certain longhaul markets where there is a South African diaspora (such as Australia, Canada) or from countries which historically were major sources of (white) immigrants to the country (such as United Kingdom, Netherlands).

Overall, a conceptual distinction must be made in South Africa's international tourism market between two different segments of visitors who are travelling to the country for different reasons. The smaller longhaul market – mainly leisure focussed – is (as a whole) a more lucrative higher yield segment of travellers. The larger segment of African visitors is travelling to South Africa for purposes of business (including cross-border trading), VFR and only for a small segment for holiday purposes (Rogerson & Visser, 2006). As has been shown by Cornelissen (2005a, 2005b) these two groups of international tourists to South Africa exhibit different geographical patterns of travel. The former concentrate in South Africa's iconic tourism destinations of the wildlife parks, and the core tourism attractions of the Western Cape, including Cape Town and the Winelands. The latter group of African tourists are drawn to South African cities primarily for business purposes and include a substantial number of cross-border shoppers. These different travel patterns of longhaul leisure travellers and the large numbers of short-stay African business travellers, shoppers and VFR tourists provide the foundations for the country's international tourism economy, including its economic geography to which attention now turns.

3. Methods and Sources

The analysis on the spatial distribution of international tourism in South Africa is based upon the local level tourism data set which is available from IHS Global Insight. The local level data provided by IHS Global Insight is used widely by both national and local governments across South Africa to inform public policy making. For tourism research the local tourism data base of IHS Global Insight is especially valuable as it contains details of the tourism performance of all local authorities in the country in respect of *inter alia*, the number of tourism trips differentiated by primary purpose of trip (leisure, business, VFR, other); origin of tourist (domestic or international); and calculation of tourism spend. From this data base information can be extracted for the period 2001-2012 relating to international travel as differentiated for all the country's provinces as well as for local, district and metropolitan authorities. The category of international travel includes both long haul travellers and the regional tourists from sub-Saharan Africa. The geographical differentiation of international tourist flows in the IHS Global Insight data is of particular interest

for this research. Full information about the methodology used and the tourism data base is available from IHS Global Insight (2015a, 2015b).

4. The Economic Geography of International Tourism in South Africa

The changing geography of international tourism in South Africa is analysed through spatial mapping the absolute numbers and changes of international tourists on the basis of South Africa's network of metropolitan and district municipalities. This exercise of spatial mapping is undertaken for 2001 and 2012; further the net change is calculated across this time period. The last section of analysis shifts to interrogate the relative contribution and importance of international tourism in terms of each metropolitan and district municipality.

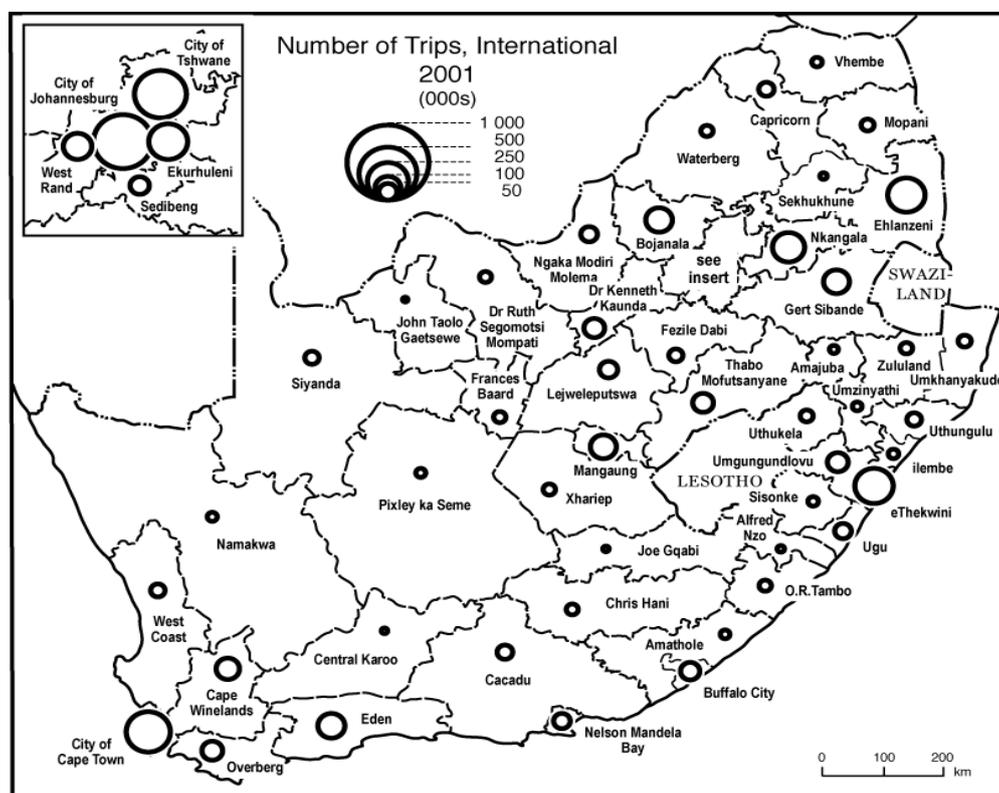


Figure 1. Patterns of International Tourism in South Africa, 2001 (Source Author)

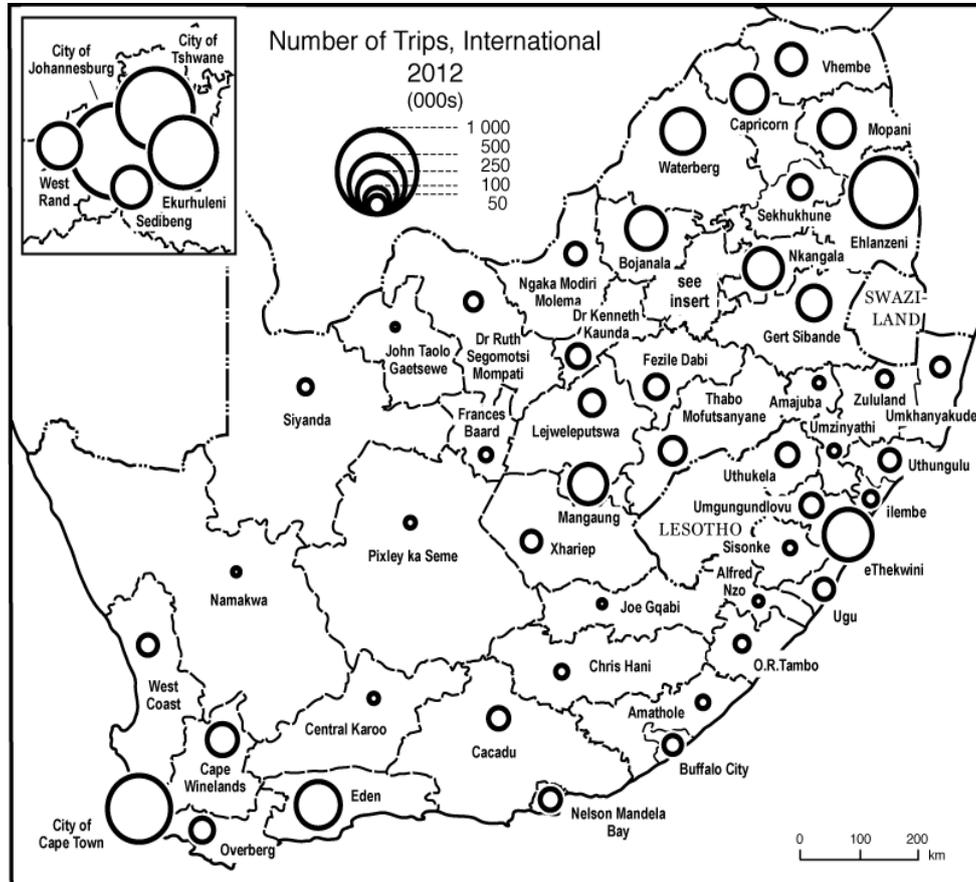


Figure 2. Patterns of International Tourism in South Africa, 2012 (Source: Author)

The Global Insight data on a municipal basis allows scientific analysis of the shifting patterns of international tourism flows. On Figures 1 and 2 are shown the destinations for international tourism travel, as indexed by total trips respectively for 2001 (Figure 1) and 2012 (Figure 2). In unpacking the spatial patterns of international tourism several points can be observed. First, is the geographical distribution of international tourism is markedly different to that observed in investigations on patterns of domestic tourism in the country (Rogerson, 2015). Domestic tourists in South Africa as a whole are far more geographically spread than are international tourists, a finding which parallels that in other countries of the relative spread of international as opposed to domestic tourism (Cortes-Jiminez, 2008; Goh et al., 2014; 2015). It is known that the patterns of (long haul) international leisure travellers exhibit concentrations at the tourist ‘hotspots’ of Cape Town, the Winelands, the gateway of Johannesburg, and areas surrounding South Africa’s major nature tourism attractions which are mainly situated around Kruger

National Park in the eastern part of the country in Ehlanzeni district municipality (Cornelissen, 2005b; Rogerson & Visser, 2006).

This said, the overall landscape of international tourist trips is heavily weighted by the significance of African tourists which concentrate their business and shopping activities mainly in and around South Africa's major inland cities of Johannesburg, Tshwane (Pretoria) and Ekurhuleni (Rogerson & Visser, 2006) and the coastal city of Ethekwini. Indeed, as indexed by total numbers of trips the most important international tourism destinations are South Africa's major cities (Rogerson & Rogerson, 2014). As indexed by total numbers of trips five of the six leading international destinations in both 2001 and 2012 are all metropolitan areas, namely the inland centres of Ekurhuleni, Tshwane (Pretoria) and Johannesburg and the two coastal centres of Ethekwini (Durban) and Cape Town. The exceptional case is Ehlanzeni which is the gateway to the nature tourism "big 5" attractions of Kruger National Park. Another distinctive group of destinations for international tourists are the borderland municipalities adjacent to Zimbabwe, Swaziland and Lesotho (Figures 1 and 2). These are areas where ethnic ties exist to encourage VFR travel and also benefit from considerable flows of shopper tourists on short-stay trips to South Africa. In particular, several of the municipalities of South Africa's northern Limpopo province (Vhembe, Mopani and Capricorn) are destinations for considerable flows of cross-border Zimbabwean visitors (Tsoanamatsie, 2014).

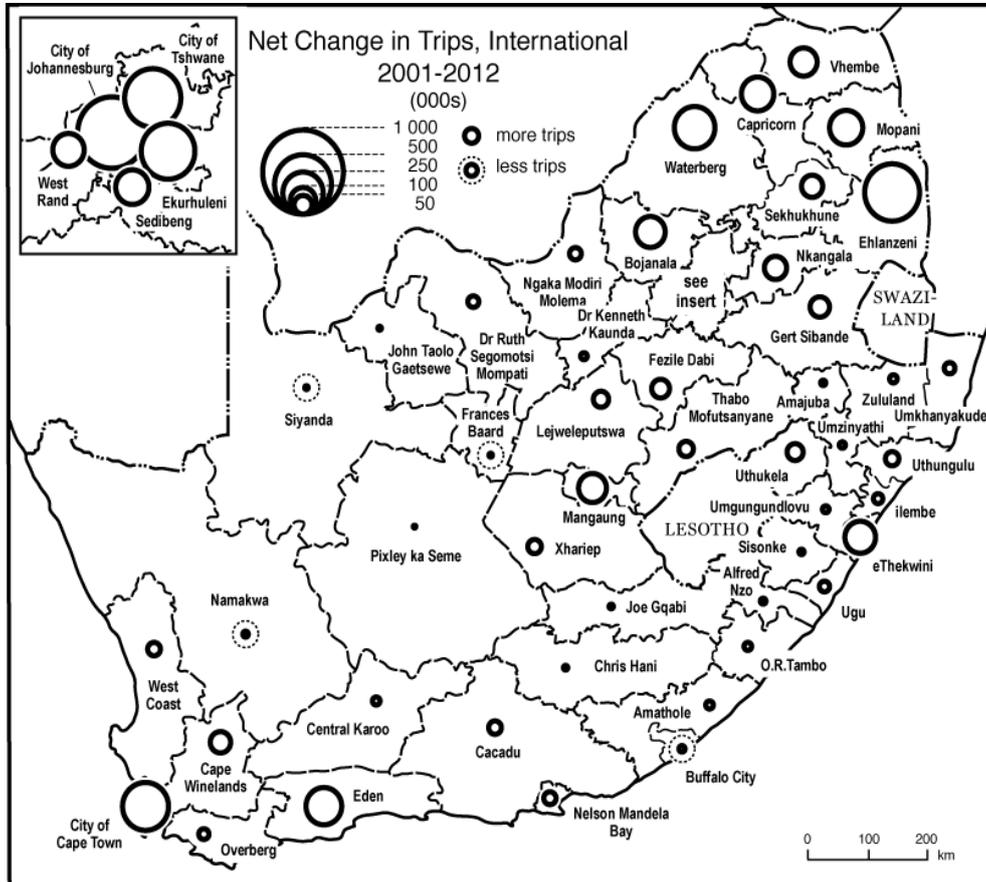


Figure 3. Net change in International Tourism Flows 2001-2012 (Source: Author)

Figure 3 provides a scientific analysis of changes occurring in spatial flows of international tourism between 2001 and 2012. Three points can be noted. First, is that there is evident an uneven pattern of change in international tourism flows across different destinations. Large absolute growth of international tourism trips is recorded in the metropolitan areas of Johannesburg, Tshwane (Pretoria) and Cape Town; the former two mainly because of African tourists, the latter because of its establishment as a globally iconic tourist city. Other areas of South Africa which record marked growth in international tourists are Ehlanzeni (nature tourism), Eden district (the Garden Route and beaches) and the borderland municipalities close to Zimbabwe. Although between 2001 and 2012 there is observed a net growth of international tourists for most municipalities, exceptions are in remote Northern Cape municipalities and most notably in the coastal metropolitan destination of Buffalo City centred on East London.

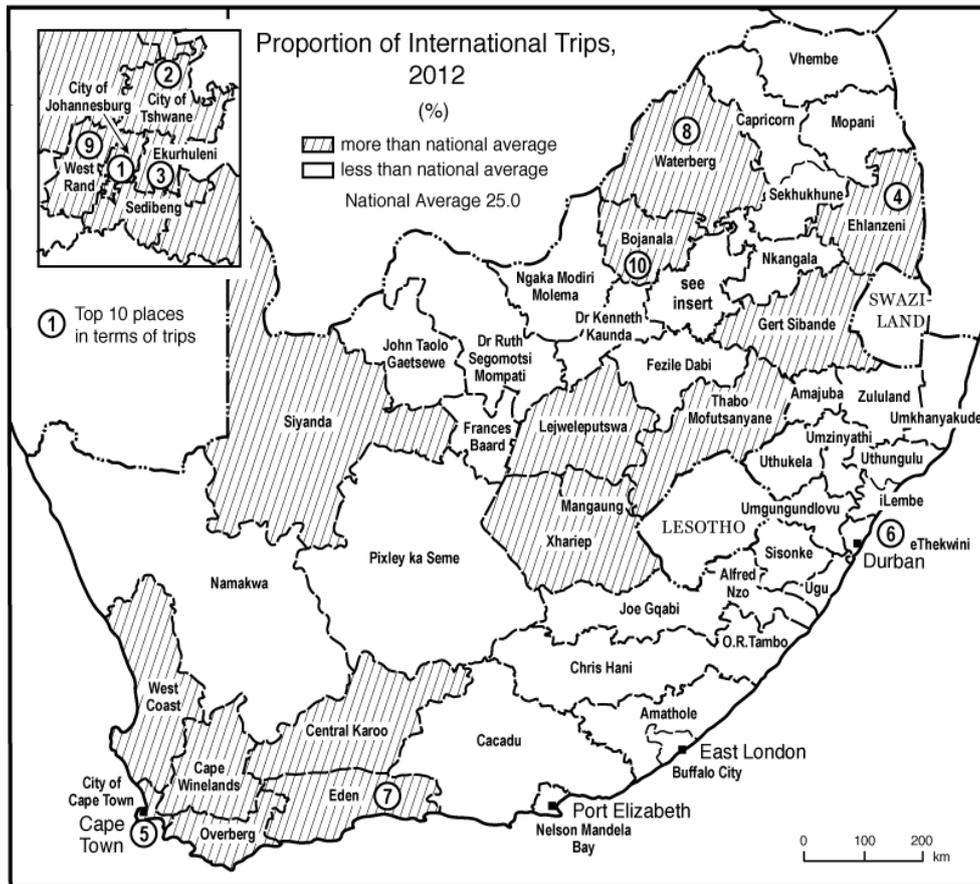


Figure 4. Share of International Trips in Total Trips, 2012 (Source: Author)

Finally, it is useful to interrogate scientifically the relative share of international trips in each municipality as compared to the national share of international tourist trips. Figure 4 shows the ten most important destinations for total international tourism trips, the dominance of the inland centres of Johannesburg, Tshwane and Ekurhuleni, and the two coastal centres of Cape Town and Ethekekwini. In addition, it maps the relative share of international trips in each district relative to the 25 percent national share. It is evident from Figure 4 that international tourism is ‘over-represented’ and relatively important across parts of South Africa; in particular in the Western Cape, the inland metropolitan areas and in many municipalities proximate to international borders. By contrast, the areas of South Africa in which international tourists are relatively unimportant are much of Northern Cape, Eastern Cape and KwaZulu-Natal provinces. In the case of Limpopo despite increasing numbers of cross-border

international trips the local tourism economies of these municipalities remain dominated by domestic travel, most of which is VFR tourism (Rogerson, 2015).

5. Conclusions

Understanding the flows and impacts of international tourism is a critical theme in global tourism scholarship. For national and local policy makers the attraction of international tourists is of major importance for economic and social development. Although the global flows of international tourism are well documented, much less understood are the spatial patterns of international tourists within national territories. This paper unpacks the economic geography of international tourism flows in South Africa. The technical findings highlight the theoretical imperative to differentiate the mobilities of long haul as opposed to regional African visitors to South Africa. The overall landscape of international tourism in South Africa is a composite of these two sets of visitors and of their differential flows variously for purposes of leisure, business and VFR travel. It is evident that tourism is a sector targeted for the leveraging of local economic development planning in South Africa. Arguably, in order to support tourism as a driver for local economic development programming there is a fundamental need for further research to enhance our understanding of the changing spatial complexion of visitor flows including of the cohorts of international and domestic travellers.

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