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## No. 13: The Rise of African Tourism to South Africa

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# **Southern African Migration Project**

## **The Rise of African Tourism to South Africa**

### **Migration Policy Brief No. 13**

**Series Editors: Jonathan Crush and Vincent Williams**

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**1.0 Introduction**

- 1.1 South Africans display considerable ambiguity if not outright hostility towards Africans from other countries (Crush 2000). The extent of xenophobia was officially recognized in the Immigration Act of 2002 which gives government a statutory obligation to eliminate the phenomenon in its own ranks and amongst the citizenry. Foreign Africans in South Africa are regularly stereotyped as criminals, job-stealers, consumers of scarce public resources and carriers of disease. There is very little recognition of the positive economic benefits of the presence of other Africans in the country.
- 1.2 Africans come to South Africa for a variety of purposes and this needs to be clearly recognized by policy-makers and the public. Some of these purposes are of enormous economic benefit for South Africa and South Africans. Easily the vast majority of Africans who come to South Africa do so legally and for purposes that fall under the general heading of “tourism.” South Africa defines tourists broadly as those who come for a time-limited stay for leisure, to visit friends and relatives (VFR), to shop and for business. In 2003, tourists spent a total of R53.9 billion in South Africa (known as “Foreign Direct Spend”). In total, tourism contributed more than R100 billion of foreign direct spend to the economy (including foreign and domestic). The average length of stay was 10 days and the spend per tourist per day was R1 548. The tourism industry employed approximately 512 000 people (South African Tourism 2003).
- 1.3 Another common stereotype in South Africa is that tourism is the preserve of visitors from Europe and North America. Nothing could be further from the truth. Certainly, there are distinct differences between the European and the African tourist, but African tourism is a growing and under-appreciated phenomenon. As such, it is part of a large global trend towards South–South tourism. This paper focuses on the nature, dimensions and impacts of African tourism to South Africa. Because this is part of a global trend, it is first helpful to look at the rise of South–South tourism more generally.
- 1.4 The general objective of this policy brief is to examine issues and initiatives concerning the growth of South Africa as a destination for intra-regional tourism. The post-1994 political changes have opened up South Africa to a major flow of regional tourists. The work of the Southern African Migration Project (see eg. Crush 1997; Rogerson 1997; Peberdy and Crush 2001; Peberdy and Rogerson 2000, 2003) draws detailed attention to the new flows of international migrants to South Africa from other parts of sub-Saharan Africa, but no attention has been paid so far to the parallel (and linked) growth of tourism flows from sub-Saharan Africa.
- 1.5 In the South African case, regional tourism is defined simply as tourism flows, by land or air, from other countries in sub-Saharan African. Two issues are discussed here. In the next section, current international debates concerning the development of regional tourism in the developing world are reviewed. In the following section, attention turns first to the

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significance of regional tourism for the tourism economy of post-apartheid South Africa and then to policy development for regional tourism. South Africa provides a useful case study of a national government's policy awakening to the importance of regional tourism as a force for the development of a country's tourism industry.

## **2.0 The Rise of South–South Tourism**

- 2.1 Over the last decade, regional tourism has become of increasing importance globally. The term 'regional tourism' represents a sub-category of international tourism and refers to intra-regional flows of tourists (Dieke 1998). Within Africa, Asia and Latin America, intra-regional tourism has been a major growth market in recent years (Ghimire 2001a, 2001b; Scheyvens 2002). A recent report by the Economic Commission for Africa notes that "the greatest numbers of international tourists are intraregional" (Gerosa 2003: 49). Ghimire (2001a) views regional tourism as a form of "mass tourism in the South" that offers the potential for growing South–South economic cooperation.
- 2.2 Despite the growth of regional tourism in much of the developing world, its policy significance has been overlooked by governments and international agencies. Regional tourists are often viewed as 'budget tourists' and lumped for purposes of strategic planning with the backpacker market or domestic tourism (Scheyvens 2002). Many governments place little planning emphasis on regional tourism which is seen as far less glamorous than international tourism. Moreover, this policy neglect of regional tourism is shared by international development agencies. A recent high profile World Bank assessment of tourism in Africa was completely silent on the potential surrounding regional tourism (Christie and Crompton 2001). Accordingly, a 'Northern bias' often pervades much national tourism planning across the developing world. Indeed, "as the dominant official concept of tourism in developing countries focuses on receiving wealthy foreign visitors from the industrialized North, most governments have put significant effort into promoting international tourism, neglecting the potentials—as well as the problems—related to mass tourism involving domestic and regional tourists" (Ghimire 2001b: 2)
- 2.3 Although international organizations such as the World Tourism Organization combine long-distance and regional tourists into the single category of 'international tourists', there is a need for a clearer distinction between these two groups. The behaviour and spending patterns of regional tourists are usually different from those of the average international tourist. Regional tourists "may be satisfied with less luxurious accommodation and more of local cultural norms than tourists coming from Europe or North America" (Ghimire 2001b:6). Indeed, because of different characteristics and spending patterns, regional tourism potentially "can create proportionately more local economic opportunities than international and packaged tourism" (DFID 1999). The implication is that regional tourism presents a potential opportunity for encouraging 'pro-poor tourism' in the developing world (Gerosa 2003). In some cases, the opposite may be true, especially when regional and national tourists originate mainly from the privileged classes in the South and engage in

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lavish consumption activities. Overall, “existing policies in developing countries tend to concentrate overwhelmingly on expanding international tourists arrivals from North and have frequently ignored both the benefits and problems of the emerging phenomenon of mass tourism involving domestic and regional visitors” (Ghimire 2001b: 1).

- 2.4 Several key factors underpin the rise of regional tourism in the South. They include the strong desire to travel among urban populations, an increasing national economy, rapid developments in transport and increased workers’ benefits accompanied by increased tourist facilities and marketing. Motivations for domestic and regional travel include pilgrimages, visiting friends and relatives, business travel and, increasingly, leisure travel. The contemporary growth of domestic tourism across the South “is enormous” and is linked to the emergence of “an exalted middle class with reasonable affluence and disposable income and a strong desire for travel” (Scheyvens 2002: 144). However, across many countries of the South leisure is no longer the exclusive prerogative of the upper classes and extends beyond the growing middle class to include participation in leisure travel by the country’s lower middle class.
- 2.5 Although regional travel is becoming an important phenomenon in several parts of the Third World, little concrete information has been collected on regional tourists. Basic information often is lacking on this growing tourism phenomenon. Of several key unknowns, Ghimire poses the following issues:
- Who are these new tourists?
  - From where do they originate?
  - Where are they concentrated? What are their leisure tastes and perceptions?
  - What are their main activities?
  - What level of awareness regarding tourism related to socio-economic and environmental impacts?
  - In what ways do they differ from tourists from the North?
  - Do these tourists have a greater impact in terms of using local materials, local accommodations and local skills?
- 2.6 One the first attempts to explore the phenomenon of regional tourism in Africa is contained in the work of Dieke (1998) for whom “the main travel motivations for Africans are business related.” However, business travel alone cannot explain the observed expansion in regional tourism within the continent. Other factors are clearly coming into play, including “politics (eg. official missions), visiting friends and relatives, holiday and recreation,” notwithstanding poor intra-regional air linkages which constrain regional travel across Africa (Dieke 1998: 40). Although Dieke maintains that leisure travel “is not integral to the lifestyle of the average African,” there is an important element of “Visiting Friends and Relatives” (VFR) in regional tourism in Southern Africa. Once again, this underscores the need to examine the inter-relationships between international migration flows and regional tourism.

2.7 Overall, it is apparent that regional tourism is an issue of considerable significance to policy-makers, not least as a vital and integral element of wider regional economic cooperation initiatives in Africa. Among the most important of these regional African initiatives are the Southern African Development Community (SADC), the African Union (AU) and the New Partnership for Africa Development (NEPAD) within which the further development of tourism has been identified as a priority for the African continent. South Africa needs to recognize the contribution made by regional tourism in the country's tourism economy and to develop a set of policy initiatives that are directed to maximize the flow of potential benefits from regional tourism.

### **3.0 Regional Tourism and South Africa**

3.1 In this section, a profile of regional tourists and of regional tourism to South Africa is presented which is based upon two sources: (a) an analysis of official data collected from departure surveys of foreign visitors to South Africa (South African Tourism 2003) and (b) and analysis of the findings of 100 interviews of regional tourists visiting South Africa from two Francophone African countries (Mba-Anto 2004).

3.2 Since 1994, with South Africa's re-integration into the global economy and the establishment of new regional economic linkages within Africa, tourism as a whole has assumed a new significance as a potential economic driver for the development of the post-apartheid economy (Rogerson 2002a, 2002b). There were 6 504 890 tourist arrivals in South Africa in 2003, an increase of 1.2 percent over 2002 and up from 5 731 424 in 1998 (Figure 1). In 2003, holiday travel accounted for 44 percent of arrivals, shopping 18.4 percent, VFR 16.0 percent and business 8.3 percent. South Africa ranks twentieth in the list of global tourist destinations.

3.3 Figure 2 shows the leading 20 country sources of foreign arrivals in South Africa for 2002. The leading five source markets and six of the leading eight source markets are South Africa's neighbouring states. The largest individual source of arrivals was Lesotho (1.6 million visitors) followed by Swaziland and Botswana. Outside South Africa's immediate neighbours, the most important source countries are Zambia, Malawi, Angola, Nigeria, Kenya and Mauritius (Figure 3). The major international source markets were the United Kingdom, Germany and the USA.

3.4 The data therefore confirms that the African tourism market is of critical significance to South Africa. Indeed, senior officials in South African Tourism note that alongside domestic tourism, visitors from Africa represent "the backbone of South Africa's tourism economy" (Mjekula 2003: 30). In 2002, 72 percent of foreign tourist arrivals were intra-regional flows from the African continent (South African Tourism 2003).

3.5 By far the largest category of foreign arrivals are those coming to South Africa by land as opposed to air. Land travellers to South Africa numbered 4.2 million arrivals as opposed

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to approximately 320 000 air travellers. The importance of land travel as a means of access to South Africa for regional tourists must be reiterated for collectively the number of regional air travellers from Africa is considerably less than the total for arrivals from the United Kingdom.

3.6 During 2003 the total direct spend in South Africa by foreign tourists was R53.9 billion. Again, the importance of neighbouring countries emerges. In terms of individual source markets the ten most significant in ranked order were:

- Mozambique (R7 473 million)
- United Kingdom (R5 767 million)
- Zimbabwe (R5 695 million)
- Botswana (R3 412 million)
- Lesotho (R3 386 million)
- Swaziland (R2 905 million)
- Germany (R2 587 million)
- USA (R2 000 million)
- Netherlands (R 1 421 million)
- France (R1 146)

Despite the higher per capita spending patterns of international travellers, African countries still represent five of the ten most significant source markets as measured by direct spend. Malawi is eleventh on the list.

3.7 Significant variations are observed in terms of per capita spend. The average tourist arrival from Europe or North America spends between R8 000–R14 000 per visit. Some African countries also have similar levels of spend including Kenya (R13 456), Malawi (R12 845) and Zimbabwe (R10 099). Others are even higher including Angola (R21 0038) and Mozambique (R17 741). Some of the highest per capita spend figures are recorded by air travellers coming from African destinations. Indeed, in 2003 the average traveller from Angola or Zambia was spending more in the country than visitors from USA or Europe.

3.8 The other important difference between international and regional visitors is that the latter spend a greater portion of their trip cost in South Africa. In the case of African countries the range is between 50 per cent (Tanzania) and 85 percent (Mozambique). In contrast, international visitors spend much less of their overall trip cost in the country. Most countries are in the 30–40 percent range and every European country is below 50 percent.

3.9 Of the African visitors as a whole there was remarkably little difference in the average spend of business as opposed to holiday visitors; for example, from Zimbabwe the average visitor spent R9 535 as opposed to R8 945 for leisure travellers. Major

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differences emerge, however, in daily expenditures with the average per day by business travellers considerably more than by leisure travellers. Again, taking the case of Zimbabwean visitors, those in South Africa as holiday tourists R1 305 per day as compared to R2 568 per day for those on business travel. A consistent finding is that the lowest totals and per diems are recorded by VFR tourists.

- 3.10 By far the majority of African tourists to South Africa fall into the category of independent travellers rather than tourists visiting the country on some form of inclusive tour (where airfare, accommodation, internal travel and food are included) or package (airfare and accommodation) arrangement. Typically, in the case of visitors from Botswana, Lesotho, Mozambique, Swaziland and Zimbabwe, at least three-quarters of visitors are independent travellers. As compared to visitors to South Africa from international destinations, it is evident that most regional African tourists are visiting South Africa for purposes other than leisure. In terms of individual African source markets, the highest share of business tourists occurs in the case of Tanzania (52.6 percent), Mozambique (49.2 percent), Kenya (48.5 percent), Malawi (48.1 percent), Botswana (47.3 percent), and Nigeria (45.8 percent). The highest share of travellers from African sources for leisure purposes are Nigeria (36 percent), Namibia (35.9 percent), Angola (35.7 percent), Zimbabwe (35.4 percent) and Swaziland (34.9 percent). In the category of VFR tourism the highest shares were recorded by the surrounding countries of Lesotho (25.8 percent), Swaziland (18.8 percent), Zimbabwe (16.8 percent) and Botswana (14.1 percent).
- 3.11 The most common length of stay in South Africa by African tourists was between 2–4 days with the highest figures recorded by travellers coming from Namibia and Tanzania (4 days), followed by Lesotho, Angola, Malawi and Zimbabwe (3 days). This short stay and more frequent visits to South Africa by regional tourists should be compared to the much longer length of stay of visitors from Europe (average 14–16 days) or the USA (10–15 days). One factor that underpins this pattern is the existence of different entry conditions for nationals of different countries. Citizens of the USA, Canada, Japan, Australia, New Zealand and most Western European countries receive preferential treatment. Their nationals are typically issued visitor permits on arrival in South Africa for stays up to 90 days. By contrast, nationals of the neighbouring Southern African Development Community countries have not enjoyed the same treatment and are granted visits not exceeding 30 days on average.
- 3.12 South Africa's economic heartland, Gauteng—which includes the cities of Johannesburg and Pretoria—is the most significant focus for regional tourism, followed by Western Cape and KwaZulu-Natal provinces. In terms of the dominance of business travel, the core focus on Gauteng is not surprising. In addition, because of its geographical proximity for land travellers, Mpumalanga emerges as a significant focus for visitors from Swaziland and Mozambique. The same is true of the Free State for visitors from Lesotho; Northern Cape for visitors from Namibia; Limpopo for visitors from Zimbabwe; and North West visitors from Botswana.

- 3.13 The highest provincial figures of bednights are again recorded in Gauteng particularly for visitors from Lesotho (4 million), Zimbabwe (2.6 million), Botswana (2.4 million), Swaziland (2.2 million) and Mozambique (2 million). Other significant flows of tourists are evident with figures of over one million bednights recorded for Lesotho visitors in Free State (3.8 million), Swaziland visitors in Mpumalanga (2.5 million), Botswana visitors in North West (1.6 million) and Zimbabwe visitors in Western Cape (1 million).
- 3.14 Overall, it is apparent that Gauteng province secures the greatest benefit from regional tourism in South Africa. Indeed, it must be noted that spending by regional tourists from Africa is now recognized as a significant element in the total market of certain Johannesburg shopping malls, most importantly at Sandton City (Stapleton 2003) and is further acknowledged in strategic tourism planning for Johannesburg (Rogerson 2003).

#### **4.0 Francophone Africa: A Case Study of Regional Tourism**

- 4.1 Overall, in terms of the broad picture of regional tourism, Francophone Africa is a small source market. Since the early 1990s, however, there has been a marked upturn in international migration to South Africa from a number of French-speaking countries in sub-Saharan Africa, in particular from Senegal, Côte d'Ivoire and Cameroon but most importantly from the Democratic Republic of Congo (Peberdy and Rogerson 2003).
- 4.2 Many Francophone African nations have sought to develop stronger business ties with post-apartheid South Africa since 1994 and new direct air linkages have been established with a number of destinations including Gabon, Senegal and Côte d'Ivoire. Accompanying these strengthening air, business and population linkages, there is an observable expansion of regional tourism flows.
- 4.3 An investigation was conducted during 2002–2003 of regional tourists coming into South Africa from the two Francophone nations of Cameroon and Gabon. In total, 100 survey interviews were conducted with travellers for these sources with 50 interviews undertaken with nationals from each of the two case study countries (Mba-Anto 2004). The results from this limited investigation disclosed a number of different aspects of the profile of visitors from Francophone Africa.
- 4.4 The majority of visitors were male (68 percent), single (77 percent) and relatively young (60 percent less than 30 years). Moreover, the largest share was visiting South Africa for the first time (58 percent) with most intending to staying in the country for at least a period of one month. The largest group of these regional tourists from Cameroon and Gabon was visiting South Africa for purpose of business or study. None of the sample was recorded as leisure travellers. Many of the older visitors were, however, in South Africa to visit members of their family who were either working or studying in the country. Indeed, nearly 40 percent of the sample was staying with friends and relatives whilst in South Africa.

- 4.5 One of the largest groups of business travellers was from Cameroon who traveled regularly to Johannesburg—often three or four times a year—in order to purchase cosmetic goods such as brand-name perfumes, toiletries and hair products for retailing in Doula or Yaounde. Other groups of travellers in South Africa for shopping were purchasing computer equipment and accessories or electrical goods and clothes. The vast majority of the shopping occurs in retail outlets in Johannesburg; a small group of shoppers from both countries bought special products, such as mohair, in either Cape Town or Durban.
- 4.6 Ninety percent of the sample of Cameroon and Gabon visitors stayed almost entirely in Gauteng, with the remainder split between Cape Town (Western Cape) and Durban (KwaZulu-Natal). Impressions of South Africa amongst these visitors for Francophone Africa were extremely positive, especially in terms of the country's good business opportunities and developed educational and health infrastructure (Mba-Anto 2004).

## **5.0 Policy Responses to Regional Tourism**

- 5.1 South Africa offers a clear exception to the general trend in the developing world for governments and policy makers to neglect regional tourism in national tourism development planning. Indeed, the CEO for South African Tourism has stated that: “The economic impact of tourism from, and between, South Africa's neighbours is of inestimable importance and it is crucial that we work together to maintain and increase in tourist arrivals in the Southern African Development Community region” (cited in Mjekula 2003: 30).
- 5.2 South Africa's Tourism Growth Strategy, launched in 2002, does acknowledge the important role played by regional tourism (South African Tourism 2002). The strategy seeks to grow international tourism in South Africa in a manner “that will take the benefits of growth of tourism to all South Africans thorough sustainable GDP growth, sustainable job creation and promoting transformation and redistribution in our economy” (South African Tourism 2003: 9). The strategic objectives of South African Tourism are six-fold:
- to increase foreign tourist volumes;
  - to increase spend;
  - to increase length of stay;
  - to promote a more even tourism space economy;
  - to reduce seasonality; and
  - to drive transformation and black economic empowerment (South African Tourism 2002; Visser 2003).

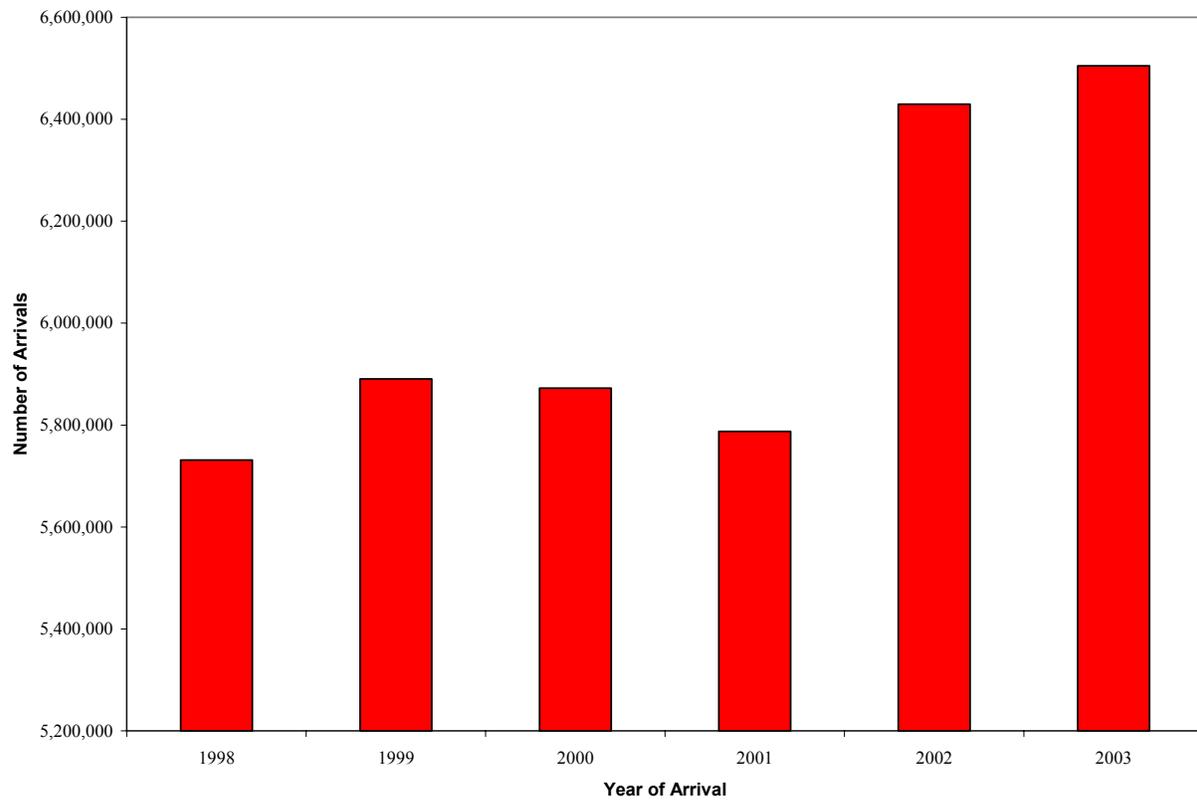
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The Tourism Growth Strategy is premised upon focusing marketing activities in both core and tactical markets within four portfolios to target specific segments of consumers.

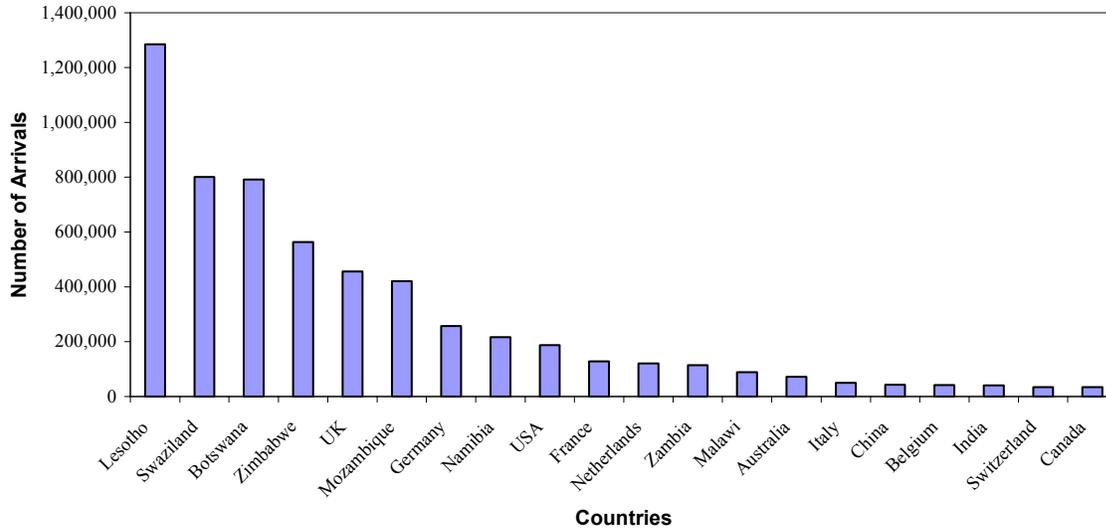
- 5.3 One of the ‘portfolios’ of South African Tourism is focused on Africa and on maximizing the benefits of regional tourism for South Africa. The strategic focus here is not simply intent on growing volume in terms of the numbers of visitors. Marketing activities in Africa are designed to extract further value from the existing visitors by ‘up-selling’ and ‘cross-selling’ into other product areas to encourage additional spending and extended stays of these visitors in South Africa (Mjekula 2003). As explained in the Growth Strategy: “a land traveler may come to South Africa for business purpose and the challenge would be either to up-sell additional entertainment and shopping components or alternatively to migrate them on their next trip to a holiday or leisure purpose” (South African Tourism 2002: 16).
- 5.4 Based upon a strategic analysis, the Growth Strategy identifies Egypt, Nigeria, Mauritius, Kenya and Tanzania as those African markets with the greatest opportunities to expand tourism yield. Kenya has been targeted for the launch of this initiative with marketing campaigns for South Africa highlighting the country’s shopping, leisure and business opportunities. Moreover, packages which incorporate these elements have been designed with the goal of encouraging business visitors to extend their stay (Mjekula 2003). Currently it is too early to assess the real impact of these campaigns. The early signs are promising as 2003 data released by Statistics South Africa (2003) shows a significant growth in tourism arrivals in South Africa from other parts of Africa.
- 5.5 The current policy paper is designed to highlight the character and importance of regional tourism to the South African economy. The impact is already considerable and likely to continue to grow. There is little economic sense in adopting a paranoid attitude to “foreigners” that then makes visiting the country even more difficult. A related point is that foreign visitors to any country want to feel welcomed and appreciated. With such high levels of xenophobia in South Africa, visitors are often the unwitting victims of acts of intolerance and violence. This is not good for the industry. A regional tourism strategy must also take into account the reception of visitors on arrival and in the country. Policy-makers would do well to highlight the significant contribution of the African tourist spend to economic growth and employment creation in South Africa.

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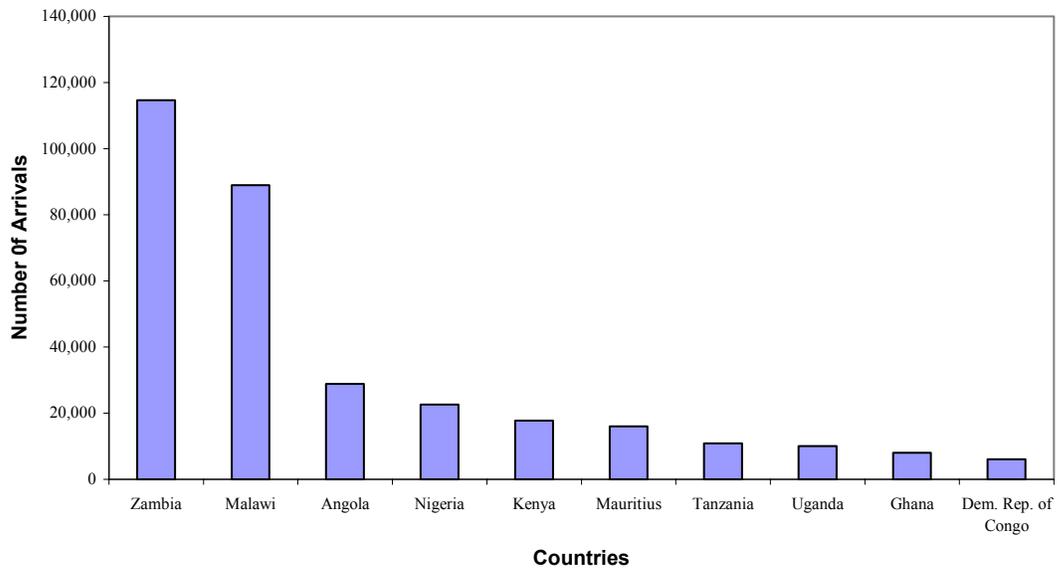
**Figure 1: Tourist Arrivals in South Africa, 1998–2003**



**Figure 2: Major Tourist Source Countries, 2003**



**Figure 3: Major African Tourist Sources (Non-neighbouring Countries), 2003**



**Table 1: Tourist Arrivals and Spend, 2003**

	<b>Arrivals</b>	<b>Average Spend in SA</b>	<b>Total Spend (Rm)</b>
<b>Africa and Middle East</b>			
Lesotho	1 284 953	2 635	3 386
Swaziland	800 686	3 628	2 905
Botswana	791 785	4 309	3 412
Zimbabwe	563 877	10 099	5 695
Mozambique	421 201	17 741	7 473
Namibia	216 313	5 547	1 286
Zambia	114 706	32 818	3 764
Malawi	88 942	12 845	1 142
Angola	28 872	21 038	607
Nigeria	22 645	12 374	280
Kenya	17 743	13 456	239
Tanzania	10 855	8 126	88
Other	2 950 126	22 299	32 097
<b>Total</b>	<b>4 485 064</b>		<b>33 485</b>
<b>Americas</b>			
USA	186 447	10 668	2 000
Canada	34 692	11 034	383
Brazil	17 452	7 855	137
Other Americas	22 905	8 905	204
<b>Total</b>	<b>262 496</b>		<b>2723</b>
<b>Asia and Australia</b>			
Australia	71 687	9 675	694
China (incl. Hong Kong)	42 822	16 761	718
India	41 018	7 594	311
Japan	21 311	8 307	177
Other Asia and Australia	88 790	8 942	794
<b>Total</b>	<b>265 496</b>		<b>2 694</b>
<b>Europe</b>			
UK	456 468	12 634	5 767
Germany	257 018	10 067	2 587
France	127 760	8 971	1 146
Netherlands	120 933	11 750	1 421
Italy	49 818	8 827	490
Sweden	29 381	13 214	388
Other Europe	277 794	11 732	3 259
<b>Total</b>	<b>1 319 172</b>		<b>15 008</b>
<b>Overall Total</b>	<b>6 504 890</b>		<b>53 911</b>

Source: 2003 Annual Tourism Report (South African Tourism Strategic Research Unit)

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