

International Tourist Flows and Urban Tourism in South Africa

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INTRODUCTION

Since the demise of apartheid, tourism development has been viewed as a priority in South Africa's broader development frameworks (Rogerson and Visser, 2004). The past decade has witnessed the introduction of significant national government support for tourism development. This has taken the form of a constant stream of new and enabling policy frameworks and strategy documents, as well as institutional support mechanisms, all aiming to expand the tourism system in such a manner so as to be both robust and cognizant of pro-poor developmental outcomes (see RSA, 1996; Department of Environmental Affairs and Tourism [DEAT], 2003, 2004, 2005). During 2006 the important role accorded to tourism in the national economy was re-iterated once again in the release of the *Accelerated and Shared Growth—South Africa (Asgi-SA)* development strategy document (RSA, 2006). Within this new macro-policy framework for South Africa, tourism is profiled, alongside business process outsourcing and bio-fuels development, as an economic sector that requires immediate and unqualified support for expansion from both the public and private sectors (RSA, 2006: 7). Accordingly, from a tourism product supply-side perspective, for a period of at least the next two decades, the South African tourism system can expect to see further rounds of support initiatives and interventions that will assist in the expansion of the tourism system.

The analysis presented in this article is based upon new data on international tourism arrivals as released by the Strategic Research Unit of South African Tourism (2005). Until recently, reliable data on international tourism arrivals into South Africa, especially from other parts of Africa, was unavailable. But, in light of the increased policy significance of tourism in the national economy, significant improvements have been made in the quality of data that is regularly collected on the South African tourism system (Rogerson and Visser, 2004).

Conventionally, in a national tourism system, tourism flows are presented in two main categories, viz., international and domestic tourists. In this discussion

the international tourist cohort itself is differentiated into the sub-components of “overseas” and “regional” tourists. It is argued that in South Africa the category of “international tourist” flows, as statistical denotation, has to be unpacked with considerable care. As will be demonstrated, the types of impacts that “international tourists” hold for the South African tourism system are closely linked to whether these tourists are sourced from other continents (i.e., overseas), or are regional tourists from Africa. This distinction between different types of international tourists is made here in the context of increased research interest and growth of “intra-regional” tourism in the developing world (Ghimire, 1997, 2001a, 2001b; Rogerson, 2004). For Africa the significance of regional tourism is confirmed by a recent report produced by the Economic Commission for Africa that highlights “the greatest numbers of international tourists are intraregional” (Gerosa, 2003: 49). The stimulation of regional tourism as well as regional cooperation for tourism was one of the recommendations to be “vigorously explored” during the conference on tourism, peace and sustainable development in Africa held in Luanda, Angola during May 2003 in the framework of the 39th meeting of the World Tourism Organisation’s Commission for Africa (World Tourism Organisation, 2003a).

In reflecting upon both the current state of international tourist flows to South Africa, as well as future increases in tourist numbers, it is necessary to consider that tourist flows and associated tourist development have particular geographies. These geographies, we argue, illustrate the central role of urban places in the local tourism system. Against this backdrop, the aim in this article is to unpack and make visible the current contours of international tourist flows to South Africa and more particularly to consider the spatial distribution of tourists whilst visiting the country. Two key and distinctive sub-streams of international tourist arrivals are discussed; the overseas or long-haul international traveller and the regional or African tourist.

THE AFRICAN CONTEXT

Within the international league tables of international tourist flows, the continent of Africa ranks poorly relative to the mature tourism destinations of North America, Europe, as well as East Asia and the Pacific Rim (Sharpley, 2002: 17). Overall, Europe is the world’s number one tourist destination region, with the European Union countries hosting 414 million tourists in 2002; that is, 54.6 percent of the global market, and earning 52 percent of global tourism receipts. Africa, with only 29 million international tourist arrivals in 2003 (World Tourism Organisation, 2003b) accounts for no more than four percent of global foreign

tourist receipts, albeit high rates of growth has been recorded over the past decade, admittedly from a low base (Mitchell and Ashley, 2006).

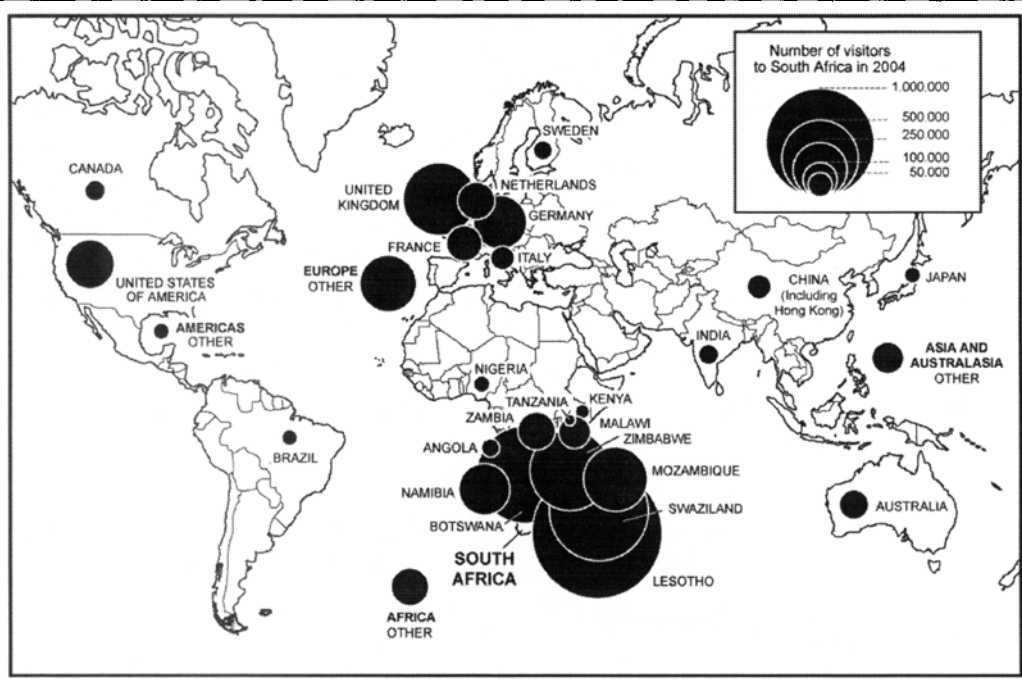
The WTO (2003b) reports that international tourist arrivals are concentrated in a relatively small number of destinations in the north-west and south-east of the African continent. North Africa, with 35 percent of the regional total and southern Africa, with 30 percent, attracted two-thirds of the total tourist arrivals, while East Africa received 23 percent, leaving only ten percent for West Africa and three percent for Central Africa. In terms of league tables of tourism receipts, the leading destinations for African tourism are shown to be Egypt and South Africa (Mitchell and Ashley, 2006). Between the four main African regions, the industry was worth an estimated \$73.6 billion in 2005, and supported approximately 10.6 million employment opportunities (WTTO, 2005). According to the WTTO, Africa will see the sector grow fourfold between 1995 and 2020. Of that growth in tourist arrivals, southern Africa, and South Africa in particular, is expected to take the lion's share of the increase in visitor numbers. According to WTTO (2005) forecasts, the southern African region by 2020 may well experience over 300 percent growth in tourist arrivals.

In South Africa since the early 1990s, there has been already an explosive growth in tourism that was boosted both by the peaceful democratic transition and, in the immediate post-apartheid years, by the "Mandela factor". In 2004 South Africa received the largest number of foreign visitors in its history of recording tourist arrivals. The nearly seven million international tourist arrivals, of which more than two million came from other continents, ranked South Africa 32nd in terms of international tourist receipts (South African Tourism, 2005). Between 1990–2004, South Africa's share of world tourism arrivals quadrupled, a phenomenon that has fundamentally changed the face of the country's tourism industry. The recent numbers of foreign tourist arrivals is a far cry from the 50 000 overseas visitors South Africa received in the mid-1980s, at the height of apartheid and of international sanctions against the country (Rogerson and Visser, 2004). The objective in the following section is to provide a comparative analysis of the importance of urban centres for the two distinctive segments of South Africa's international tourism economy, viz., the long-haul or "overseas" tourist on the one hand and of "regional tourists" or visitors from Africa on the other.

OVERSEAS AND REGIONAL TOURIST FLOWS TO SOUTH AFRICA

Figure 1 shows the sources of foreign visitor arrivals to South Africa for 2004. It is revealed that the African market generates the largest volume of international tourist arrivals for South Africa (Saayman and Saayman, 2003; Rogerson,

Figure 1: The Geography of International Visitor Arrivals in South Africa, 2004

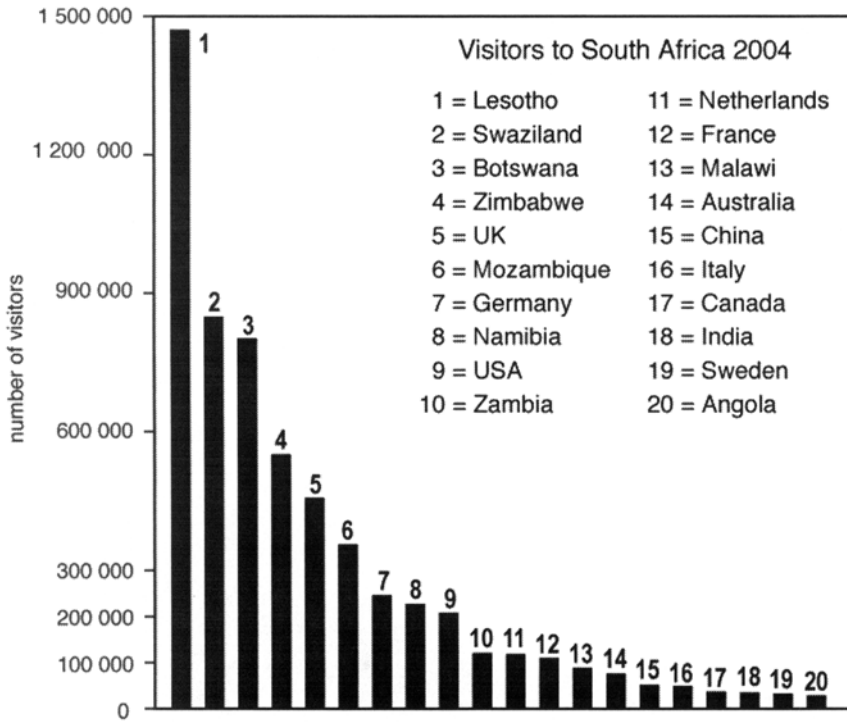


Source: South African Tourism, 2005

2004). Of a total of 6.67 million international tourist arrivals during 2004, 70 percent were intra-regional tourists from the African continent (South African Tourism, 2005). Moreover, by far the largest category of arrivals from Africa, originated from neighbouring states of South Africa with most visitors travelling to the country by land as opposed to air transportation. Indeed, of the 4.5 million arrivals from the countries of the Southern African Development Community (SADC), only approximately 204 000 or less than 4.5 percent were air travellers.

Figure 2 highlights the leading 20 country sources of foreign arrivals in South Africa for 2004. It is immediately evident that the leading four source markets, and six of the leading eight source markets, are South Africa's neighbouring states. The largest single tourist generating countries are Lesotho (1.47 million visitors) followed by Swaziland (849 179) and Botswana (802 715). The key overseas source markets are the United Kingdom (456 368), Germany (245 452) and the USA (208 159). The importance of land travel as a means of access for regional tourists to South Africa once again is underlined. Collectively the number of SADC regional air travellers to South Africa from Africa (approx. 200 000) is

Figure 2: Leading Country Sources of Foreign Arrivals in South Africa



Source: South African Tourism 2005

considerably less than the total for arrivals from the United Kingdom (approx. 450 000), which ranks as fifth overall in terms of its significance as a source market as indexed by numbers of visitor arrivals.

It is evident from Table 1 that South Africa’s two groups of “international” tourists visit the country for very different reasons. In terms of the overseas market it is clear that North American and European tourists visit South Africa mainly for holiday or leisure purposes. By contrast, most regional African tourists are visiting South Africa for purposes of business as opposed to leisure. In terms of individual African source markets, the highest share of business tourists occurs in the cases of Mozambique (71.5 percent), Tanzania (63.9 percent), and Botswana (60 percent) (South African Tourism, 2005). The highest shares of travellers from African sources for purposes of leisure are recorded respectively for Angola (38.5 percent) and Zimbabwe (38.2 percent). Not surprisingly, in the category of VFR (Visiting, Friends and Relatives) tourism the highest shares were recorded in the case of the surrounding countries of Namibia (47 percent), Lesotho (40.8 percent), Zimbabwe (28.4 percent), and Swaziland (25.5 percent).

Table 1

Purpose of Visit to South Africa, by Geographical Origin				
	Holiday	Business	VFR	Other
Angola	38.5	31.4	16.1	14.1
Australia	50.0	18.7	25.6	5.6
Botswana	11.5	60.0	19.8	8.7
Canada	55.9	21.1	16.9	6.2
China	43.7	41.4	11.0	4.0
France	73.7	17.3	6.5	2.5
Germany	76.7	13.0	6.8	2.5
India	22.7	59.3	15.1	2.9
Italy	72.7	19.8	5.7	1.8
Lesotho	9.7	35.1	40.8	14.4
Malawi	27.8	47.2	16.5	8.4
Mozambique	17.7	71.5	7.6	3.1
Namibia	25.9	20.1	47.0	7.1
Netherlands	78.1	10.3	8.1	3.5
Swaziland	22.7	42.1	25.5	9.6
Sweden	63.1	25.4	7.4	4.1
United Kingdom	70.1	10.8	16.7	2.4
USA	61.0	21.9	10.3	6.9
Zambia	25.9	41.9	20.7	11.4
Zimbabwe	38.2	26.9	28.4	6.6

Source: South African Tourism 2005

Table 2 provides some insight into the manner in which international tourists organise their visits to South Africa. On the whole, travellers to South Africa prefer independent travel options. 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 tourism (where airfare, accommodation, internal travel and food are included) or package (airfare and accommodation) arrangement. Typically, in the case of visitors from South Africa's neighbouring states, at least three-quarters of the visitors are independent travellers. Overall, the market segment that makes the greatest use of all-inclusive packages is comprised of tourists from France, China and Japan, probably reflecting the fact that these markets are still not that highly familiar with South Africa. Moreover, the English-language barrier is a factor that prevents many of these tourists from engaging in independent travel, particularly when considering the far higher lev-

Table 2

Organisation of Visit to South Africa, by Geographical Origin				
	Fully Inclusive Package	Full Package	Package	Independent
Angola	9.8	1.0	1.3	87.8
Australia	17.8	3.8	2.2	70.9
Botswana	23.4	1.8	5.6	69.2
Canada	27.1	2.7	2.6	71.4
China	38.2	9.1	5.4	48.8
France	44.9	4.4	3.0	44.5
Germany	27.9	4.9	3.3	62.3
India	23.0	4.8	1.3	60.9
Italy	39.0	6.3	7.5	50.1
Lesotho	25.6	5.3	1.7	67.4
Malawi	13.4	4.9	1.7	79.9
Mozambique	7.1	5.2	3.2	84.5
Namibia	13.2	5.6	1.5	79.7
Netherlands	28.3	3.4	5.2	58.5
Swaziland	27.8	2.5	1.7	67.9
Sweden	23.5	3.4	5.5	62.3
United Kingdom	22.1	3.8	2.6	72.2
USA	28.9	4.2	2.5	65.9
Zambia	10.8	3.2	3.4	82.6
Zimbabwe	12.8	5.4	1.6	80.1

Source: South African Tourism 2005

els of independent travel among tourists from English-speaking countries such as Australia, the UK and the USA.

During 2004, the total direct spending in South Africa by foreign tourists was R47.8 billion. The total spent by African visitors was estimated at R25 billion, which represents roughly a 53 percent share. This figure should be compared to the nearly R13 billion contributed to the tourist economy from visitors sourced from Europe and R2.5 billion from the Americas. In terms of individual source markets, the ten most significant in ranked order were Mozambique (R7548 million), the United Kingdom (R5819 million), Zimbabwe (R4516 million), Lesotho (R3967 million), Swaziland (R3304 million), Germany (R2338 million), Namibia (R1903 million), USA (R1808 million) and the Netherlands (R1087 million).

Despite the higher average spend patterns of overseas, as opposed to, African travellers, African countries still represent five of the most significant source

Table 3

Average Spending (Rand) in South Africa, by Geographical Origin and Purpose of Visit					
	All Categories				
	of Tourist	Holiday	Business	VFR	Other
Angola	10 860	11 909	10 743	7 788	11 982
Australia	8 955	7 573	15 914	7 434	4 085
Botswana	4 103	3 822	5 118	1 773	2 436
Canada	8 479	8 738	9 982	7 239
China	10 993	10 993	8 582	5 049
France	6 811	6 888	6 398	6 873	7 626
Germany	9 626	9 787	8 104	7 222	14 903
India	12 185	6 783	16 423	5 205
Italy	7 601	7 636	8 127	7 340
Lesotho	2 697	3 745	3 766	1 346	2 320
Malawi	8 126	7 775	8 781	5 731	9 854\
Mozambique	21 213	12 435	25 949	14 076	8 413
Namibia	8 425	8 383	15 653	4 464	8 986
Netherlands	8 999	8 356	12 405	7 706	12 466
Swaziland	3 891	5 255	3 936	2 791	3 166
Sweden	9 197	10 775	6 617	8 079
United Kingdom	12 751	9 242	33 376	10 625	16 033
USA	8 687	9 124	8 403	7 345	7 943
Zambia	7 606	8 380	8 313	3 093	10 666
Zimbabwe	8 196	9 118	7 977	6 615	10 313

Source: South African Tourism 2005

markets as measured by direct spend (Table 3). Significant variations are observed in terms of average direct spend with the average tourist arrival from Europe or North America spending between R9 000—R13 000 per visit as compared to between R2 000 (Lesotho) and more than R21 000 (Mozambique) for certain source markets of African travellers. Of note is that some of the highest average spend figures within South Africa are recorded by travellers coming from African destinations. Indeed, according to the latest available South African Tourism data, the average tourist arrival in South Africa from Angola, Kenya and Mozambique was spending more in the country than even visitors from the USA or Europe. Overall, however, of the African visitors as a whole there was relatively little difference in the average spend of business as opposed to holiday visitors, for example from Lesotho the average business visitor spent R 3 766 as

opposed to R 3 745 for leisure travellers. Major differences emerge, however, on data concerning average spend per day with the average per day by business travellers considerably more than for leisure travellers. Again, taking the case of Lesotho visitors, those in South Africa as holiday tourists are recorded as spending R801 per day as compared to R1 682 per day for those on business travel (Table 3). A consistent finding is that the lowest expenditures, both in total and on a per diem basis, are recorded by VFR tourists. For example, a Lesotho VFR tourist spends only R376 a day.

Table 4 provides important insight into the geographic distribution of international tourism in South Africa. It is shown that the spatial distribution of the overseas and regional visitor cohorts differ significantly. Indeed, it is apparent that two distinctive geographies can be recognised. The mass of overseas tourists, who are mainly leisure seekers, demonstrate a high level of visitation to the

Table 4

Geographic Visitation by Province of Tourists by Country of Origin

	Western Gauteng	Eastern Cape	KwaZulu- Cape	Natal	Mpu- malanga	Limpopo	North West	Northern Cape	Free State
Angola	87.7	14.8	0.4	6.5	2.1	2.5	7.5	0.5	2.1
Australia	62.0	55.7	16.7	28.3	26.2	7.7	12.7	3.6	5.5
Botswana	45.6	2.0	0.6	9.7	1.2	2.2	42.7	1.6	1.5
Canada	57.6	50.5	20.4	35.4	29.7	7.6	9.1	1.0	9.1
China	79.2	58.8	7.5	13.5	6.1	0.9	30.2	2.5	3.4
France	57.3	61.1	21.4	43.5	46.2	5.2	8.4	4.6	7.1
Germany	41.8	69.2	33.3	34.4	36.0	4.5	7.1	6.4	7.5
India	73.3	34.4	7.1	34.3	8.6	0.8	20.0	0.0	2.6
Italy	49.3	67.3	32.4	36.0	41.6	3.3	9.0	2.8	2.2
Lesotho	42.1	5.6	2.6	13.5	1.8	2.1	2.5	0.9	34.1
Malawi	79.0	10.0	4.7	21.4	16.0	5.5	7.5	3.6	9.2
Mozambique	53.0	3.2	0.4	7.8	53.1	1.5	0.4	0.0	0.4
Namibia	14.4	68.7	2.9	2.7	0.6	0.1	0.3	28.1	1.2
Netherlands	52.1	59.0	28.0	32.6	45.9	9.8	10.3	6.0	12.2
Swaziland	53.3	1.6	0.9	35.0	16.9	2.9	1.2	0.5	2.1
Sweden	40.4	67.4	34.8	25.3	27.6	3.5	5.5	2.5	6.7
United Kingdom	39.8	66.4	22.6	28.2	25.1	2.9	8.8	2.2	2.6
USA	54.5	53.9	15.0	23.6	27.9	6.6	10.4	3.1	5.0
Zambia	76.6	4.2	4.2	21.9	8.9	6.2	6.2	4.7	10.7
Zimbabwe	74.1	6.0	6.0	20.6	5.8	34.8	1.4	0.4	2.4

Source: South African Tourism 2005

Western Cape and secondarily to Gauteng, a finding which is mostly explained by Johannesburg's function as international gateway for the country. In an exhaustive study of overseas tourists travel itineraries, Cornelissen (2005) unpacked the travel geography of this tourist cohort. It was shown that the typical tour for overseas tourists of South Africa ran from Johannesburg in the north of the country to Cape Town in the south.

An example of such a tour was presented as follows:

Tourists typically arrive at Johannesburg airport where they visit Gauteng's urban attractions such as the Apartheid Museum, Gold Reef City, Sandton City, and the Union buildings in Pretoria. The tour then goes on to Mpumalanga (private game reserves) and the Kruger National Park, Swaziland, to Zululand and then Durban. In the city of Durban the beach and a cultural village are visited. From there tourists go on to the city of Port Elizabeth, which is the gateway to the Garden Route where the resort towns of Knysna and Plettenberg Bay are the main focal points. From there the town of Oudtshoorn is visited with the tour moving on to Cape Town. In Cape Town key attractions include the V&A Waterfront, Cape Town Central Business District which comprise visits to the Castle of Good Hope, the Company Gardens, St Georges Mall and the Cathedral, the Cape Town Parliamentary Buildings, and more generally different examples of Cape Dutch architecture (adapted from Cornelissen, 2005: 687–688).

From this typical itinerary what is of critical importance is that whilst the South African tourism system is portrayed as consisting largely of nature-based tourism products, urban places, and hence urban tourism, play a very important role in the visits of overseas tourists to South Africa.

Table 4 shows also the distribution of visitors from African sources in terms of provinces that were visited. The picture emerges that Gauteng, South Africa's economic heartland, 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 and in particular Africa's economic hub Johannesburg, is not surprising. In addition, because of their geographical proximity for land travellers, respectively Mpumalanga emerges as a significant focus for visitors from Swaziland and Mozambique, Free State for visitors from Lesotho, Northern Cape for visitors from Namibia, and North West for visitors from Botswana.

Overall, it is evident that Gauteng province secures the greatest benefit from international tourist flows in South Africa, with the regional tourist component particularly strongly represented. The importance of regional tourists for the retail economy of Gauteng has been recognised by economic development planners. It has been estimated that African shopping tourists spend annually R10 billion in the province, across accommodation, transport, food, and other ser-

vices (Sebelebele, 2005). The land cross-border trade accounts for approximately 750 000 tourists spending more than R6 billion each year (ComMark Trust, 2006). A major element in Johannesburg’s retail tourism economy is comprised of small-scale and informal cross-border traders drawn from surrounding countries, most importantly from Mozambique and Zimbabwe (Peberdy, 2000a, 2000b; Peberdy and Crush, 2001; Peberdy and Rogerson, 2003). It is estimated that the retail tourism sector has experienced a consistent annual growth of about three percent and stands out as having significant further potential for expansion (ComMark Trust, 2006).

Finally, Table 5 gives a breakdown of international tourists’ use of different types of accommodation during their visit to South Africa. Several major trends can be highlighted from these statistics. First, it is important to note that family and relatives (VFR) represent the single largest source of accommodation provi-

Table 5
Accommodation Usage of Tourists by Country of Origin

	Hotels	Guest Houses	B & Bs	Game Lodges	Self-Catering	VFR	Back-packer Hostels	Camping & Caravans
Angola	28.6	16.3	0.2	1.1	12.0	38.9	1.0	0.0
Australia	17.0	3.7	2.9	7.4	4.5	43.6	11.6	1.9
Botswana	23.8	12.4	7.4	5.1	5.7	37.9	0.1	1.4
Canada	22.6	6.6	5.5	7.0	8.6	38.5	5.0	0.4
China	24.8	4.7	1.0	3.3	8.6	27.4	3.4	0.1
France	32.9	5.8	6.3	10.5	9.6	16.4	6.6	2.1
Germany	21.8	8.7	10.2	7.2	12.3	15.8	9.9	3.2
India	26.8	5.5	0.8	1.6	19.8	27.5	4.8	0.4
Italy	34.3	6.7	9.3	11.4	4.1	22.2	4.0	3.5
Lesotho	18.9	5.9	2.7	0.2	1.3	62.8	1.0	0.5
Malawi	49.6	7.8	3.0	2.3	2.4	28.8	0.4	2.8
Mozambique	62.5	3.0	2.9	2.2	0.4	27.3	0.7	0.1
Namibia	8.5	5.7	4.9	0.9	2.0	61.3	6.4	0.4
Netherlands	20.9	14.5	8.6	7.2	3.5	21.5	9.8	6.0
Swaziland	22.7	7.8	6.3	3.4	2.4	51.8	0.9	1.7
Sweden	25.1	9.0	10.0	5.6	11.4	20.3	8.8	2.8
United Kingdom	22.9	6.4	4.8	6.1	7.8	32.4	10.0	1.8
USA	27.3	4.3	5.8	11.6	7.4	25.2	6.6	4.5
Zambia	32.0	9.6	4.0	2.9	2.5	43.6	1.3	2.0
Zimbabwe	9.2	3.7	5.2	2.8	11.4	60.5	1.3	2.1

Source: South African Tourism 2005

sion for international visitors to South Africa. The majority of tourists coming from countries in Africa use this form of accommodation. As more than 70 percent of South Africa's population reside in urban places, this means that these VFR tourists would be based in cities and towns, at least for part of their visit to South Africa. Secondly, in the "overseas" category, the use of this form of tourist accommodation is also prevalent. The high levels of VFR tourism among Australian and British tourists can be linked to the South African diaspora concentrated in those countries, visiting family and relatives in South Africa. Again the geographic spread of the country's population suggests that these tourists also would find their way to the country's major urban concentrations, particularly Johannesburg, Cape Town, Durban and Port Elizabeth. Third, it is noticeable that hotel accommodation is frequently used as tourist accommodation across all sectors of the international market. Nevertheless, it is clear that tourists from China and Japan prefer hotel accommodation to all other forms of accommodation. With regard to the rest of the international market, hotel accommodation is primarily preferred by Continental European visitors. Hotel accommodation is also the secondary preference amongst tourists from African countries. What is significant here is that hotel accommodation in South Africa is primarily located in the urban context, and not resort enclaves in rural areas. Perhaps most surprising is the relatively low usage of guesthouses and bed-and-breakfast accommodation. However, the support patterns of these accommodation types are probably more a reflection of the share of such establishments in the accommodation supply, than of a demand on the part of these tourists. Finally, it is also clear that holiday resorts, camping sites and backpacker hostels do not feature prominently in terms of current international visitors' accommodation demands.

In terms of the length of stay of international tourists in South Africa, a significant difference is disclosed between regional and overseas tourist markets (South African Tourism, 2005). The most common length of stay in South Africa by regional, African tourists was between two to four days with the highest figure recorded by travellers coming from Nigeria and Tanzania (six days), followed by Kenya, Namibia, Zambia (four days) and Zimbabwe (three days). The short stay and more frequent visits to South Africa by regional tourists should be compared to the much longer length of stay of overseas visitors from Europe (14 days) or the USA (seven days). One factor that underpins this pattern is the existence of differential entry conditions for nationals from different countries (Cassim and Jackson, 2003). Under present conditions, citizens of most of the industrialised North are typically issued visitor permits on arrival in South Africa for stays of up to 90 days according to return/onward flight dates. By contrast, nationals of the neighbouring Southern African Development Community countries do not

enjoy the same treatment and are granted visas not exceeding 30 days. In addition, the nature of the visit also plays a significant role, with the regional visitors conducting business (often shopping) visits, whilst the overseas visitor is mainly pursuing leisure activities. The common denominator for both the overseas and regional tourist is visits to South Africa's urban places.

CONCLUSION—IMPLICATIONS FOR URBAN TOURISM

South Africa is emerging as a tourist destination in which urban places have become a focal point in the country's overall tourism product portfolio. Although a range of nature-based tourist products play a vital role in the destination choices of overseas tourists to South Africa, it has been demonstrated that the country's urban centres are also central places for these tourists' experiences of South Africa. For the regional tourists to South Africa—visiting for purposes of business with the largest number for cross-border retail tourism—urban areas are the core foci with Johannesburg the shopping Mecca. The different profiles, characteristics and geographies of these two segments of international tourism arrivals in South Africa have been revealed.

An understanding of the differences between overseas and regional tourists is of special significance in terms of policy and planning for urban tourism. The role played by urban places in terms of the tourism experience of overseas and regional African visitors must be appreciated as somewhat different. For the overseas tourist, cities comprise an important element within their general experience of South Africa, which includes the country's rural-focussed, nature-based tourism products. The urban focus provides a number of opportunities where overseas tourists can make a valuable contribution to broadening the visitor-base of various urban attractions that might not otherwise be viable, if they were dependent upon only domestic or regional tourists. In this respect, a range of urban tourism-led local economic development initiatives seen in the North can be explored in the South African urban context, not least in cities such as Cape Town, Durban, Johannesburg and Pretoria. Importantly, the further development of a host of cultural, heritage and creative tourism industry segments can significantly enhance the urban experience for the overseas tourist market as well as maximising opportunities for urban tourism.

For regional tourists, the cities are the major attractions, for purposes of business, shopping and increasingly also for health tourism. The policy issues around regional tourism are of particular significance for the major cities of Gauteng and in particular for Johannesburg. With national policy recognition of the importance of African tourists for the country, South African Tourism has launched

a number of aggressive marketing campaigns, particularly in Kenya and Nigeria, designed to increase the flow of high spending African visitors. In addition, the City of Johannesburg has acknowledged the need to further maximise the developmental opportunities offered by the city's attractions for cross-border shoppers. It has been shown that inefficiencies in long distance transportation, visa access difficulties, and issues around safety and security are constraints that are costing Johannesburg tourism millions of Rand annually in lost revenue from regional tourists (ComMark Trust, 2006). Addressing these issues through targeted policy interventions would lead to an increase in arrivals as well as an increased spend through longer stays of visitors. In addition, they would open up opportunities for the marketing and development of tourism products outside of Gauteng in order to achieve a greater geographical spread of the impact of regional tourists.

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