REGIONAL TOURISM IN AFRICA: SOUTH AFRICA AS A SOURCE OF, AND DESTINATION FOR REGIONAL TOURISTS

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A thesis submitted to the Faculty of Science, University of the Witwatersrand, Johannesburg, in fulfillment of the requirements for the degree of Doctor of Philosophy

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Declaration

I declare that this thesis is my own, unaided work. It is being submitted for the Degree of Doctor of Philosophy at the University of the Witwatersrand, Johannesburg. It has not been submitted before for any degree or examination in any other University.

Ruth Wanjiku Kiambo

Thirtieth day of January 2014

Abstract

African countries in general have registered improved socio-economic and economic growth and development for the past 20 years since the 1990s. Of particular interest is southern Africa which has recorded a period of unprecedented political stability and economic growth in the wake of South Africa's change to a democratic dispensation in 1994. Economic growth has brought with it an increase in the number of families counted in the middle class and therefore as prospective domestic and outbound tourists. This study examined the extent to which both the private and the public sectors in southern Africa, created with a focus on overseas or international tourists, have recognized this regional tourist market. The study used the core-periphery relationship as the conceptual framework to determine the difference ways in which core and periphery dynamics influenced the recognition of the regional tourist as a tourism market. The research found that the regional market has been recognized to different extents by the public and the private sector in the four case study countries. The core country, South Africa, has shown the most comprehensive recognition by dedicating resources to research into and planning around how to capture or retain market share. The peripheral countries have dedicated few if any resources to understanding the regional market; their systems and investors continue to focus primarily on the international market, and because the international and regional markets have different needs, find it difficult to switch their focus to this emerging market. The study also found that having a core country as an immediate neighbor pulls all those with the willingness and ability to travel towards itself, to the detriment of domestic tourism development in the short-term. The study suggests that to access the existing regional market, the three case study countries of the periphery would be well served to adapt to their circumstances the data-driven approach of South Africa.

Dedication

To the ancestors upon whose shoulders I stand.

For Ng’endo, so glad you came.

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CHAPTER ONE: INTRODUCTION

1.1 Background

In the developing world tourism has largely been pursued over the past four decades (1970 – 2012) as an export, a means to earn foreign exchange and for economic development. In many developing countries, despite attracting a growing number of international tourists, the developmental impact of tourism has fallen short of what was anticipated or projected, due to a number of well-known constraints. Furthermore, besides the unrealized positive potential of international tourism, tourism development has created numerous social and cultural problems and challenges, one of which is dependency (Sharpley and Telfer 2002).

Within the African context, as with most developing countries, modern tourism was developed during the period of colonialism (Harrison 2000). The infrastructure inherited from the colonial era, developed for extractive exploitation of the resources and raw materials for export, has proved useful in the establishment of modern tourism infrastructure. The tourism industry as it is structured is an industry that mainly pursues the "high volume – low profit" model (Bastakis et al., 2004) thereby requiring high volumes of tourists to make profit. In this spirit of high volume travel, 2012 marked the year that global tourism figures surpassed the 1 billion tourist mark (UNWTO 2012). This served as a clear indication that despite the depressive economic effects of the 2008 global financial crisis, tourism proved to be a resilient industry.

Of the five tourism regions defined by the UNWTO, Europe continued to be the top receiving region with 51% (504 million) of global tourists in 2011 (UNWTO 2012b), while the African region was in fifth position with 5.1% (50.2 million) of the global tourist traffic in 2011. A closer inspection of these international arrivals figures showed that "the large majority of international travel takes place within the traveler's own region, with about four out of five worldwide arrivals originating from the same region" (UNWTO 2012b: 12), confirming that regional tourism is indeed simply an extension of international tourism.

Interest and research around the phenomenon of regional tourism in the developing world has been growing since the late 1990s. The term regional tourism as a sub-category of international tourism refers to the intra-regional flow of tourists so that, in the African context, regional tourism refers to the movement of tourists resident within the African region (Rogerson 2004a). The research of Ghimire (1997, 2001a, b), Sharma (2006), and Winter et al. (2009) stresses the varying and growing profiles of regional tourists within the larger category of international tourists. Ghimire (2001a) sees regional tourism as a phenomenon of "mass tourism in the South", offering potential for growing South-South economic cooperation.

Modern tourism in Africa developed during the late 19th through the 20th centuries. It was, according to Harrison (2000), developed by colonialists for colonialists. It was oriented towards meeting the leisure travel and vacation needs of privileged white people and the few local elites and businessmen (Harrison

2000). This start has had significant influence on present day development patterns and focus areas of tourism development at national level. The colonial roots begin to explain what is considered the dependency of African countries on attracting the international market of tourists. This has traditionally been the market that brought in sufficient income from tourism to make national tourism development a worthwhile activity. However, Africa has experienced a change in this situation over the past two decades (1990 to 2012). The international market is no longer the only viable source of tourism receipts. Economic growth experienced in Africa during the past two decades has been significant enough to create social and economic classes with enough disposable income and motivation to undertake regional travel on a regular basis. This fact, coupled with increased freedom of cross-border movement, among other factors, has increased African interest in multipurpose travel outside their own countries but still within their region. The multipurpose travel combines activities such as leisure, business, shopping, visiting friends and relatives, and health treatment (Rivett-Carnac 2006).

In southern Africa particularly, the post-1994 political and economic dispensation has opened the region up to greater flows of regional tourist traffic (Rogerson 2004a, 2011a). Although the tourism arrivals statistics collected in this region leave room for improvement in terms of accuracy and comparability, they do draw attention to the large volumes of tourist movement within the region. With such significant volumes of travel, what role has the regional tourist market been prescribed in Southern African national policies and strategic planning on tourism development?

1.2 Research aim

The purpose of this thesis was to examine the extent to which four southern African countries have recognized and harnessed the growing volume of regional tourist flows in the region. It is argued that government plays a key role in orienting national tourism development through its tourism policies and strategic plans. Therefore the absence or low-profile of regional tourism in government policy and strategy points to the negligence of this tourism market. On the other hand, the private sector in tourism is essentially the frontline of the industry and therefore cognizant of changing market trends and shifting demand in the industry earlier than the public sector. This means it would be in a position to lobby for changes to enable the harnessing of emerging market segments such as regional tourists. For this reason, the opinions of private sector actors regarding the trends in regional tourism were sought in the four case study countries to determine whether they too have recognized and harnessed regional tourism.

It is further argued in this research that with respect to tourism, the four case study countries are engaged in a typical core-periphery relationship, which is examined in Chapter 3. In this relationship, South Africa is the core while Botswana, Mozambique and Zambia are individually and collectively, the peripheries. This is a simple enough argument, but the thesis goes further to determine that though the core-periphery relationship is the dominant one, it could be mitigated by immediate proximity between core and periphery and by parallel tourist flows from the peripheral countries into South Africa, elements on which classical core-periphery theory is silent.

A regional and sustainable source of inbound tourists would go a long way in reducing dependency on international tourists, particularly in view of the diminishing desire to travel to long-haul destinations given travelers' increasing vigilance against international terrorism (Gaibulloev and Sandler 2011), not to mention increases in oil prices which increase the cost of travel. Furthermore, regional tourism has the potential to lessen economic leakage – a common problem with international source markets (Christie and Crompton 2001) – and to develop local economies to a greater extent than is permitted by the modalities and biases of international tourism as explained by Britton (1982).

The growth in the regional tourist market segment could potentially contribute to sustainable tourism development and to local economies. This potential warrants that governments in sub-Saharan Africa should pay greater attention and devote more structured resources to serving this market, albeit not to the exclusion of international tourism.

Finally, the research also sought to understand and document, albeit broadly, the characteristics of regional tourists and how these related to those of long-haul visitors.

1.3 Definition of study area

The region studied was within southern Africa with the four case study countries being members of the Southern Africa Development Cooperation (SADC) (Figure 1.1). The countries were, Botswana, Zambia, Mozambique and South Africa.

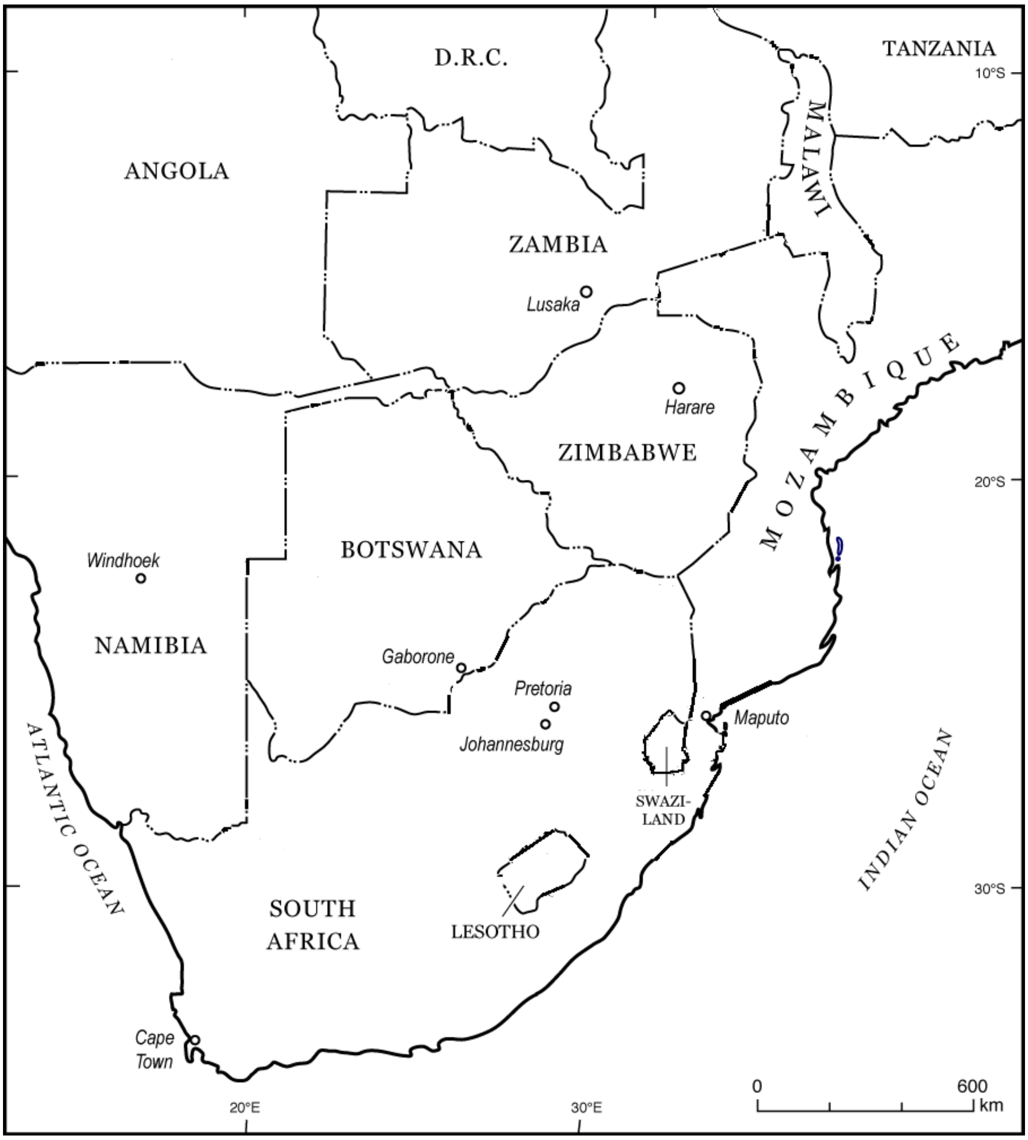

Figure 1.1. Map showing the location of the four case study countries.

The reason these four countries and not others in the region were selected was to provide an opportunity to examine the evolution of different national responses to regional tourism, given different points of departure or initiation of tourism development (Table 1.1).

Table 1.1. Justification for selection of case study countries.

BOTSWANA • A rentier economy based on mining, • Increased interest in tourism development arose from need to diversify economy, • Tourism development policy focused exclusively on high-spending tourist segments, • Shares border with South Africa, with the N4 Platinum Highway as a major access road.	MOZAMBIQUE • Has been in post-conflict reconstruction since1992, • Tourism infrastructure was degraded but has improved steadily since 1992, • Official language is different (Portuguese) from that of bordering countries (English), • Shares border with South Africa, with the N4 Maputo corridor as the major access road.
SOUTH AFRICA • Economy opened up to rest of Africa in 1994 after nearly a decade of economic sanctions, • Has solid infrastructure (air, road & rail network, telecommunication), • Is a 'core' country in the regional sense, being more industrialized and having (a) other countries in the region sourcing goods and services from it, (b) regional and international flight hub in Johannesburg, • Has an articulate tourism policy that clearly recognizes the regional tourism market.	ZAMBIA • Previously a rentier economy dependent on copper mining, • Experienced economic weakness as a result of implementing Structural Adjustment Program in the 1990s, • Tourism sector built up since the 1990s and benefiting from economic sanctions against Zimbabwe, • Sun International has invested in the Livingstone area, thereby attracting South Africans to the area • Does not share a border with South Africa. Access to Zambia from South Africa is through either Botswana or Zimbabwe.

The countries were selected, not on the basis of the volume of tourists they send to or receive from each other, but because their tourism policies and industries had evolved and developed in different socio-economic contexts.

1.4 Scope and rationale

The scope of this study was the recognition of the regional tourism market in the public and the private sector of the four case study countries. Essentially whether regional tourism as a market was significant enough to warrant allocation of resources from the perspective of government strategies and policies, and attention from tourism private sector in the four case study countries. In terms of the period of the study, the thesis focused on the period between 1990 to 2012. This period of 22 years provided an adequate timeframe in which to study inbound arrival trends on regional tourism flows and the evolution of tourism policy and planning. In each country, the focus was on tourism planning organizations and stakeholders, namely the ministries under whose domain tourism development falls, allied destination marketing organizations, and the designated organization representing tourism private sector. The research methodology used in this study is presented in Chapter Two.

1.5 Thesis structure

The research is presented in ten chapters. **Chapter 1** is the introductory chapter which presents the case study countries, rationale for their choice, and the overall aim of the research. **Chapter 2** presents the research and analysis methodology, and the context of the study. **Chapter 3** outlines the conceptual framework upon which the thesis research is predicated. **Chapter 4** reviews the literature on regional tourism development in the developing world, the impact it has had and issues it has raised. **Chapter 5** presents the key changes that have occurred between 1990 and 2011 to make regional tourism development viable in southern Africa. **Chapter 6** discusses Botswana's regional tourism development. It presents empirical findings from interviews and observations on the extent to which regional tourism has been recognized by the public and private sector. **Chapter 7** addresses the case of Zambia's regional tourism development. **Chapter 8** presents the case of Mozambique, a country with immense natural and mineral resources, and has enjoyed growing regional tourist flow volumes and infrastructure. **Chapter 9** presents the case of South Africa's regional tourism development and the way in which it has played a key role as the core to the three countries' periphery. **Chapter 10** provides a summary of the major findings and discussion of themes in the research, and presents the contribution of this thesis to the body of knowledge.

CHAPTER TWO: RESEARCH METHODOLOGY

2.1 Introduction

This chapter presents the methodology used to conduct the research study. Specifically it presents more detail on the selection of study area and why the case study method was chosen. It also talks of the process of fieldwork, collection and treatment of qualitative and quantitative data, and analysis of the same. Finally, it speaks of the challenges and constraints of applying the selected methodology.

2.2 Selection of the study area and context

To determine the extent to which, within southern Africa, the regional tourist market had been recognized, it was necessary to conduct a study of multiple countries. The objective of selecting four case countries was not only to determine whether the regional tourist market segment was receiving attention, but also to determine if there was an evolution or a trend towards this recognition. That is, whether all countries were coming to the same conclusion, via different avenues, about targeting the regional tourist market. The four countries had different backgrounds with respect to when tourism development began in the country, whether tourism was considered a social or an economic activity/sector, and with respect to the type of tourism product they were developing and the tourist markets they targeted.

Within each country the public and the private sector were investigated. Interviews held with representatives of the two sectors helped in verification of research results; checking that what one sector said was confirmed by the other sector and was borne out by the reality on the ground as observed by the researcher.

2.3 The methodological framework: qualitative and quantitative data

The study methodology used Yin's (2003) guidelines on how to conduct a multiple case study. The four cases therefore fit the criteria outlined by Yin (2003) on instances where case study methodology should be applied. The research did indeed aim to understand complex phenomena in the form of country choices of what markets to target or not. This case study methodology was also applied because the aim was to develop an understanding of what issues influenced the recognition of the regional tourism market. The results supported the selection of the case study methodology, indicating that the recognition (and attendant apportioning of resources to develop it) of a tourist source market segment is not necessarily a straightforward process, and is usually influenced, not by data but by longstanding marketing practice.

Having chosen the case study methodology for this research, it was possible to mix several different types of data, namely in this case, qualitative and quantitative data sets, and to draw on both empirical and secondary sources of information and data. The documentary or secondary sources of information for this study came from government reports and documents which included, *inter alia*, national poverty reduction strategies, national development strategies, and national tourism policies and strategies. Further to these documents were the tourism development policies from ministries mandated to develop the industry, as well as the marketing and development strategies of the destination management organizations or tourism boards. National development documents and academic literature on the four countries was also drawn upon, as were private sector industry reports such as Grant Thornton's *Tourism Talk*.

Data on tourism arrivals collected from the national statistical offices were the key quantitative data used in this study. Empirical data were collected through semi-structured interviews with identified key tourism stakeholders in the four case countries, and through attendance at tourism workshops and trade fairs. The questions asked during the interviews are found in Box 2.1. The following two theoretical propositions acted as the guides or framework around which information was collected and questions asked of informants.

1. There has been an increase in the number of intra-regional tourists.
2. Tourism planning and policy in the public and private sectors have been cognizant of these growing numbers and have put in place measures to harness these growing numbers for national and regional economic and social development.

The semi-structured nature of the interviews allowed the informant to provide information based on their considered professional views as well as information on emerging trends or upcoming initiatives that were yet to be documented in the public domain. This qualitative approach allowed for the identification of themes and theory formation relating to the regional tourist market. There were slight modifications to the questions when asking private sector players, though the responses all contributed to the main theme of regional tourism recognition and growth.

The drawbacks of the semi-structured interviews were that an interview would sometimes be very time-consuming because of deviations from the topic of discussion, thus requiring the researcher to return to the main issues by allowing the informant to feel that their opinion was valid on whatever matter, but that the conversation needed to focus on regional tourism. Sometimes respondents would provide brief responses and not elaborate on them. This would cause the researcher to spend time trying to extract more information by reformulating the questions. Some of the responses provided by informants were verifiable through other interviews and documentary evidence. However, there were many personal opinions provided by the informants, which were treated as useful thematic information in the study analysis.

Box 2.1–Questions asked during the semi-structured interviews

- What is the view of the national tourism sector towards the regional tourist source markets?
- How have the immigration/visa policy and travel regulations affected the development of regional tourism?
- What firms (foreign, national and regional) have invested in the tourism industry, and why did they find the country favorable?
- Where is most of the regional tourist traffic into your country from?
- How have government and private sector responded to this market? Has policy been enacted to facilitate travel and investment – and in what specifically?)
- How has domestic travel changed with time in the country? How has it been facilitated?
- Have packages been developed specifically for needs of regional market or domestic market?
- How are the special rates for local, regional and international tourists determined and regulated?

Informants

Many of the semi-structured interviews were conducted between 2004 and 2007. However, as finalization of the thesis grew delayed, many of the same informants were approached periodically to provide updates of trends and evolutions in policy and strategy. The list of people interviewed is available in Table 2.1.

Table 2.1: List of informants interviewed in the course of the study.

	Name	Institution	Country
1	Gil Saunders	Grant Thornton South Africa	South Africa
2	Derek Houston	Director, Houston travel marketing service	South Africa
3	Hesphina Rukato	New Partnership for Africa's Development (NEPAD), Secretariat Environment & Tourism Advisor	South Africa
4	Nikki Akanbi	Federated Hospitality Association of Southern Africa (FEDHASA) – Interior	South Africa
5	Kate Rivett-Carnac	Tourism specialist, Development Bank of Southern Africa (DBSA)	South Africa
6	Tumaini Leshoai	South African Tourism, Portfolio Manager Africa & the Middle East	South Africa
7	Leon Kroet	Intercape Bus service	South Africa
8	Marc Bra	Hotelier, West Africa	South Africa
9	Francis Mfune	Market Research and Promotions Manager, Regional Tourism Organization of Southern Africa (RETOSA)	South Africa
10	Lucy Wangui & Elizabeth Kamau	Bruma Tennis Centre	South Africa
11	Elizabeth Kariuki	Afrobound Holidays Travel Agency	South Africa
12	Stanley Subramoney	Deputy CEO, Price Waterhouse Cooper	South Africa
13	John Aritho	Hotelier, East and Southern Africa	South Africa
14	Sheila Otieno Osanya	Spa in the country, Muldersdrift	South Africa
15	Diego Lofuedo	Expedia.com – E-tourism conference	South Africa
16	Amy Scarth	EyeForTravel – E-tourism conference	South Africa
17	Matsatsi Morobe	Tourism Business Council of South Africa (TBCSA)	South Africa
18	Michael Sudarkasa	Africa Business Direct	South Africa
19	Mark Govender	Traffic Statistical Analyst, Airports Company South Africa(ACSA)	South Africa
20	Ercilia Mata	ECI Africa	South Africa
21	Adrienne Harris	International Finance Corporation (IFC) - Program SMART	South Africa

	Name	Institution	Country
22	Damian Cook	E-Tourism Frontiers	South Africa
23	Caroline Creasy	Head: Corporate Affairs, Multichoice Africa	South Africa
24	Lerato Nonanye	Africa marketing manager, The Don Suites	South Africa
25	Soliciter Cheelo	Zambia Tourism Board	Zambia
26	M. E. Dhliwayo	Senior Economic Affairs Officer, UNECA/SRDC-SA	Zambia
27	Charity Lumpa	Zambia Tourism Board, Marketing Director	Zambia
28	Mary K Cope	NGO	Zambia
29	Percy Bwalanda	Tourism Council of Zambia	Zambia
30	Iris Duiker	Project Officer, World Bank, Zambia	Zambia
31	Soliciter Cheelo	Zambia National Tourism Board	Zambia
32	Josephine Meele	Tourism Council of Zambia	Zambia
33	Milner Makuni	Statistics department; Ministry of Tourism, Environment and Natural Resources	Zambia
34	Sikopo Macwani	Statistics department; Ministry of Tourism, Environment and Natural Resources	Zambia
35	Victor Inambwe	Acting Executive Director; Tourism Council of Zambia	Zambia
36	Christpine Kagulura	Zambia Institute of Marketing	Zambia
37	Peter Zulu	Zambia National Tourist Board	Zambia
38	Christpine Kagulura	Zambia Institute of Marketing	Zambia
39	Andrew Chilufya	Ministry of Tourism	Zambia
40	Chungu Mwila	COMESA Private sector development	Zambia
41	Philip Baker	Pronexus marketing	Mozambique
42	Marta Lucas	Ministry of Tourism	Mozambique
43	Marco Gustinelli	Terra Profunda (Tour operator)	Mozambique
44	Paulo Pires	Advantage Consulting	Mozambique
45	Sam Jones	Ministerio da Planificacao e Desenvolvimento	Mozambique

	Name	Institution	Country
46	Bernando Dramos	INATUR (National Tourism Fund – DMO)	Mozambique
47	Joaquina Pascoal	Escola Superior de Hotelaria e Turismo	Mozambique
48	Albino Mahumane	Ministry of Tourism; National Director, Planning and cooperation	Mozambique
49	Angela Lima	OperationsDirector; Linha Aereas de Mocambique	Mozambique
50	Fernando Cuna	Manager; Hotel Pestana Rovuma	Mozambique
51	Gildo Neves	Futur (National Tourism Fund)	Mozambique
52	Hiuane Abacar	Director; Direccao Provincial de Turismo (DPTUR)	Mozambique
53	Horacio Dombo	Centro de Promocao de Investimentos	Mozambique
54	Jaime	Atlas Tour Agency	Mozambique
55	Solange Macamo	University of Eduardo Mondlane (UEM)-Archaeology	Mozambique
56	Irene Visser	International Finance Corporation (IFC)	Mozambique
57	Kwasi Agbley	USAID	Mozambique
58	Maria dos Anjos	MITUR (Ministry of Tourism)	Mozambique
59	Marcos Perreira	Terra Viva	Mozambique
60	Arlindo Pindula	Futur (National Tourism Fund)	Mozambique
61	Katia Momade	Futur (National Tourism Fund)	Mozambique
62	Carlos Sitoe	Linhas Aereas de Mocambique (LAM)	Mozambique
63	Leonel Matssumane	MITUR - National directorate of planning and cooperation	Mozambique
64	Quessanias Matsombe	Associacao Hoteis Sul Mocambique (AHSM)	Mozambique
65	Zacarias Sumbana	MITUR (Ministry of Tourism)	Mozambique
66	Macario Mendonca	Linkage Officer, Centro de Promoção de Investimentos (CPI)	Mozambique
67	Alda Salomao	Terra Viva	Mozambique
68	Michelle Gomes Souto	International Finance Corporation (IFC)	Mozambique
69	Federico Vignati	SNV(Netherlands Development Organization)	Mozambique
70	Thato Makwaje	Department of Tourism, Research and Statistics Unit	Botswana

	Name	Institution	Country
71	Rahab Mwendwa	Independent Tourism Consultant	Botswana
72	Onyana	Intercape Gaborone	Botswana
73	Dan Mughogho	Department of Wildlife	Botswana
74	Temalo Maggie Lesethe	Principal Tourism Officer, Ministry of Environment, Wildlife and Tourism (MEWT)	Botswana
75	Tafa Tafa	Tourism Officer, Marketing, Botswana Department of Tourism	Botswana
76	Mokopi Grace Marata	Senior Tourism Officer, Ecotourism, MEWT, Dept of Tourism	Botswana
77	Eric Theron	First Secretary Political, South African High Commission	Botswana
78	Patrick Chivese	Group Sales Manager, Cresta Marakanelo Hotels	Botswana
79	Imbuwa Sianga	Senior Tourism Officer, Licensing Inspections Grading	Botswana
80	Mary Ngwenya	Principal Tourism Officer, Marketing, Ministry of Environment, Wildlife and Tourism	Botswana
81	Ashok Ariyaratnam	Scania– Botswana	Botswana
82	Kelapile Ndobano	Chief Macro Economist, Division of Economic Affairs, Ministry of Finance and Development Planning	Botswana
83	Norah Mohwasa	Marketing, HATAB (Hospitality and Tourism Association of Botswana)	Botswana
84	Olebogeng E. Morebodi	Intercape Gaborone	Botswana
85	Dr. Montsi	Sociology Department, University of Botswana	Botswana
86	Obenne Mbaakanyi	Local & regional markets marketing executive, Botswana Tourism Board	Botswana
87	Hendrik Wierenga	Mokolodi Backpackers	Botswana

Each country had a minimum of sixteen (16) informants interviewed, with the total number of interviewed informants being eighty-seven (87). The number of people interviewed per country varied according to the resources available to conduct the fieldwork. In Zambia and Botswana, where the researcher was not able to travel to more than once, the number of informants was low. This, however, was offset through emails and telephone calls made to the relevant departments and institutions. However, because face-to-face meetings proved more effective, most people contacted remotely were reluctant to provide much detail via telephone or email.

2.4 Procedures during fieldwork

The fieldwork consisted of conducting interviews and gathering relevant documentary sources. The preferred manner of conducting interviews was face-to-face with the informants. Where this was not possible due to distance or a tight schedule, a telephone or Skype interview was used, with the researcher incurring the costs. The consideration of logistics required as well as the limitation of time and funds for travel in each country played a role in the selection of informants. Because the researcher was based in Johannesburg, she was able to visit the other three case study countries at least once in the course of the study period.

The informants for the interviews were chosen using the snow-ball sampling method. This method was considered relevant despite the limitation it presents of obtaining data that are biased towards one network and away from other networks

(Jacobsen and Landau 2003). This limitation was not considered to be damaging to this study, given that the focus was on national tourism policies, which are necessarily centralized in designated government ministries and departments. There is thus really only one ‘network’ as it were, in the public sector.

Informants from the public sector were selected on the basis of being employees of the Ministry of Tourism, the Central Statistics Unit, the Planning and Development Department, the National Air Carrier and the National Tourism Board. The informants were then asked to provide the name of a colleague either in the public or private sector, who could provide further insight into regional tourism development. Informants from the private sector were identified and selected on the basis of belonging to the private sector tourism trade organization. Furthermore, some informants were identified by the public sector functionaries interviewed, while others were identified from the workshop or conference line ups.

2.5 Data analysis

The semi-structured interviews yielded qualitative data which were analyzed through thematic analysis to identify patterns, attitudes and themes (Boyatzis 1998). The deductive approach was used which allowed patterns and themes to be identified in line with the theoretical propositions.

2.6 Constraints experienced in the research and methodological limitations

Two key constraints affected this research: limited of funds for fieldwork, and long delay in finalizing the thesis write-up. The limited funds meant that it was difficult to spend as much time as necessary in each of the four countries identified. The fact that the researcher lived and worked in Johannesburg, South Africa, a regional hub and headquarter especially in matters of tourism, proved very useful in surpassing this constraint of funding. This is because contacts could be made with key stakeholders in the public and private sectors from the other three case countries that were attending regional conferences or planning events. The multiple visits to case countries were necessary because the first visit was essentially one of reconnaissance where informants were identified based on the situation observed by the researcher. One or two subsequent visits were required to interview the informants identified during the first visit, as well as others identified in the interim.

Furthermore, as the second constraint's effects were felt, the researcher contacted many of the same informants to provide updates on trends and changes in policy and strategy. This meant that the research evolved instead of being straightforward and time-bound. However, this ultimately worked out in favor of the research because from 2010 onwards, the question of the regional tourist market began receiving more attention from the public sector.

Methodological limitations of this research were the following: the selection of case study methodology and the collection of mostly qualitative data, which is considered as being more relevant for exploratory research, while surveys and other methods are more relevant to the descriptive and theory building phases. Quantitative data were limited to tourism arrivals statistics obtained from the national central statistics offices or the national destination management organizations. Most of these data, particularly from earlier years, were incomplete and inconsistent. The differing quality of tourism arrivals data over time was further increased by the assistance provided to SADC nations by the UN World Tourism Organization to improve data collection methodology since 2000, resulting in more refined and standardized data through the tourism satellite account methodology. This has led to recent national tourism statistics being more disaggregated and therefore providing more detailed information about inbound tourists than earlier data. Quantitative comparison of the data between 1990 and 2012 was therefore difficult. Nonetheless, all the data collected in the course of this study served to provide an overview of trends in the growth of regional tourist volumes, their activities and spending.

CHAPTER THREE: TOURISM DEVELOPMENT PARADIGMS AND THE CORE-PERIPHERY RELATIONSHIP

3.1 Introduction

This chapter presents a review of the core–periphery framework and the literature on non-Western tourism. The chapter is divided into three sections, the first of which will present the three dominant tourism development theories. The second section presents the thesis conceptual framework; namely the meaning and different forms of the core-periphery model. The third section reviews the literature on non-Western tourism to highlight the characterization and classification of regional tourists from the four case study countries.

3.2 Tourism development literature

The case for a shift from perceiving tourism as merely a recreational activity to promoting it as a force for economic development was made by European countries such as Greece, France and Spain in the 1950s and 1960s (Elliott and Mann 2005). In the early 1960s, the Spanish government used the foreign exchange generated by tourism as the basis for the importation of machinery and technology required for industrialization (Cortes-Jimenez and Ortuno 2005). Furthermore, the increase in regional tourist flows to Spain contributed substantially to its economic growth so that by the end of the 1960s, tourism accounted for 93% of total national export earnings (Murphy 1985; Valenzuela 1998).

Multilateral lenders such as the Bretton Woods institutions sought to replicate this Spanish success in developing countries, alongside traditional export industries such as agricultural, mining and manufacturing as a way to boost the balance of payment receipts of these countries (Mathieson and Wall 1982; Brohman 1996). The rationale for this emphasis on tourism development was that "a modern economy must have more than one leg to stand on and we need to develop the stunted or atrophied legs of other sectors as well" (Gordon 1969: 237). It is important to note that particularly in Africa, income from tourism did not go into supporting industrialization of the host country economies. It was lost, instead, to the traditional leakage channels of importing construction material for tourism infrastructure, remuneration of foreign staff, importation of food and drink, or was used to pay down the debts these nations had with lending institutions (Britton 1982; Sindiga 1999; Cai et al. 2001). Likewise, due to the economic setbacks experienced in the developing countries to which the multilateral lenders had given loans, the private sector which should ideally have taken up the mantle of tourism development in these countries was still weak or un-constituted (Jenkins and Henry 1982; Brohman 1996). Government therefore played both the role of investor and that of regulator, borrowing capital to initiate tourism infrastructure such as roads, hotels and airlines that would help attract the European long-haul tourists (Gordon 1969; Diamond 1977; Elliott and Mann 2005).

As the multilateral lenders' focus on tourism continued, development theories were adapted to the context of tourism development in an attempt to analyze what was happening in developing countries that were pursuing tourism as a source of economic growth. Three main theories: modernization, dependency and neoliberal are outlined, providing the background to the conceptual framework and analysis framework to be used in this thesis.

3.2.1 Modernization theory

The modernization approach to development identified only one ‘road’ to modernization and indicated that all countries were at different positions along the ‘road’, with developed countries being the furthest along and developing countries still a considerable distance from their destination (Sharpley 2000). It started from the premise that underdeveloped countries were thus due to the ‘backwardness’ occasioned by their traditional practices and institutions (Khan 1997). It further reasoned that the benefits of modernization which included local employment, increased incomes, business opportunities and increased economic linkages between local producers and hotel and resort consumers (Britton 1982; Mathieson and Wall 1982; Khan 1997; Sharpley and Telfer 2002; Reid and Schwab 2006), would be diffused through contact between developed and less-developed nations (Sharpley 2000; Reid and Schwab 2006). Furthermore, at a national level, these benefits would diffuse to rural or less developed areas (Reid and Schwab 2006).

3.2.2 Dependency theory

The dependency theory initially addressed economic development of Latin American economies (Kay 1998), but was later expanded to analyze other developing economies (Khan 1997). This theory asserted that the underdevelopment experienced in developing countries was not the result of backwardness or lack of industry on the part of the citizens, but due to the asymmetrical and unequal nature of economic relations between ex-colonizers (considered the metropolitan core) and ex-colonies (considered the satellite or periphery) (Khan 1997). Whatever surplus production at the periphery, which could have been used for its development, was instead taken to (and benefited) the core, or was taken by the local elite which had been left to service the needs of the core (Britton 1982; Sharpley 2000).

3.2.3 Neoliberal theory

The 'lost decade of development' is what the decade of the 1980s is called. It was characterized by effects from the late 1970s caused by the oil embargo and by the drop in prices of many commodities exported by developing countries. It represented a developmental crossroads for developing nations, which either chose to pursue the interventionist model of national development, or to follow the neo-liberal model promoted by the global lending institutions. Asian countries, for the most part, pursued the interventionist model where government played the central role in initiating, financing and implementing development projects (Lawrence and Thirtle 2001). African countries, on the other hand, mostly pursued the neo-liberal model of development (Carrasco and Berg 1999) which involved the implementation of economic structural adjustment programs (SAPs) (Dieke 1995).

Neo-liberalism sought to put the private sector and profit motive at the centre of development in a country (Equations 2007). In this development theory, government's role is the provision and facilitation of an enabling environment for the private sector to conduct business. The private sector is expected to efficiently develop services and infrastructure to supply market opportunities (or demand) that arise (Carrasco and Berg 1999). However, due to the nascent nature of market forces in African countries, market failure occurred in the provision of many private sector-relegated services. This resulted, then and now, in the national tourism industry of many African countries being dominated by Trans-National Corporations (TNCs) and foreign investors once government was barred, by multilateral lender rules, from participating directly in tourism investment.

3.3 Core and periphery in tourism development

The core-periphery or dependency theory is relevant to this study and has been used in the context of tourism, cultural development, and media bias, all expressing the dominance of one area or group over another. Table 3.1 presents the principal characteristics of cores and peripheries drawn from the various thematic areas.

Tourism context

The development of the tourism industry in any area is understood to either create or aggravate existing core-periphery inequality (Kauppila 2011). Diagne (2004) confirms this negative impact when he elaborates on how tourism development has disrupted residents' lives and dignity through the creation of an enclave resort.

This resort effectively renders the community around it a periphery and source of cheap labor. Britton (1982, 1991) implicated the government in the collusion with Trans-national Corporations (TNC) and metropolitan core in the way they structured and oriented legislation and licensing modalities to favor TNCs or local dominant firms and not the majority of local-run businesses. He stated that organic development of international tourism in developing countries was impeded by the overwhelming influence of TNCs and foreign investments along the value chain. TNCs were able to determine the image of the peripheral destination, have initial contact with clients, make the booking and travel arrangements, and provide the accommodation at the periphery of resorts which either they or the local elite managed. All this placed the local investors at a developmental disadvantage with respect to the international tourist market, and within the tourism industry in general.

Erisman (1983) identified three ways in which a core-periphery relationship could be established- through being a former colony (classic core-periphery relationship); by a country permitting foreign investment in any areas of the economy; or by a national government accepting to relax its rules in exchange for receiving foreign aid.

Table 3.1. Fundamental characteristics of cores and peripheries.

Core	Periphery
Tourists move from developed and economically endowed to economically deprived countries; they buy holidays from travel agencies based in their countries, and stay at resorts owned by investors from the core (Britton 1982).	Plays host to inbound tourists from economically endowed countries; depend on travel intermediaries to sell holidays to their destinations, and import goods and human resources to meet the high standards expected by tourists from the core.
Core countries are capable of economic growth and self-sufficiency, usually fueled by surplus or revenue that has been extracted from the periphery.	Growth in the periphery is dependent upon the growth of the core. Incapable of independent growth because the resources it would use for this growth have been extracted by the core.
The core is the centre of population and a concentration of economic activity. It has the best access to transport, communication, resources, and has heritage or admin significance (Muller and Jansson 2007; Chaperon and Bramwell 2013).	The periphery lacks sufficient capital or infrastructure due to remoteness is distant and difficult to get to from population and economic centers.
The core is the seat of power (administrative, cultural and economic) and where decision-makers define meaning and strategy; availability of capital, resources and influence means it is able to take advantage of local investment opportunities (Jordan 2007; Lacher and Nepal 2010).	The periphery is passive, it receives (does not create) instructions and strategies from the core and has little influence in determining direction of planning. Lack of capital means it is only able to provide the most basic services with respect to accommodation and restaurants, due to low skill level.
Flexible and innovative, with fast flow and access to knowledge and information (Botterill et al. 2000 in Kauppila 2011).	Relies on ideas and technology from the core and is therefore not very flexible or innovative and suffers from slow flow of information and knowledge.
Population is youthful, active and knowledgeable (Hall 2007).	Large outflows of youth towards the centre; high population of old, retired people.

All three roots ultimately lead to the depletion of a country's economic self-sufficiency and to dependency on other economies. A further argument of Erisman's (1983) work on cultural dependency made the observation on race relations, stating that when non-white communities continuously played host and servant to white guests, these communities would become accustomed to seeing themselves as both economically and culturally dominated by the tourists' culture and expectations (Erisman 1983). The work of Weaver (1998) echoed this perception of domination and exploitation by determining that in Trinidad and Tobago, tourists from the dominant island (Trinidad) were perceived by their hosts (Tobagonians) as possessing "arrogance, aggressiveness, conspicuous wealth, [and a] tendency to regard Tobago as their private fiefdom" (Weaver 1998: 299). The same sentiments were expressed in the context of Asian regional tourism between dominant and less dominant economies, where it was stated that "…Singaporeans … complain incessantly when local standards fail to match up with what they are accustomed to back home… [and they] 'export' Singaporean arrogance and high expectations" (Chang and Raguraman 2001: 61).

Weaver's work (1998) on domestic tourism in Trinidad and Tobago employed the core-periphery model and uncovered the complex and nuanced interactions of different island nations. The model he created to explain this relationship consisted of three concentric circles with the innermost one representing the 'internal periphery', the middle circle representing the 'internal core', and the outer circle the 'external core'. The introduction, in tourism analysis, of a buffer (internal core) between the traditional core (external core) and periphery (internal periphery), provides an important level that can be useful to analyses at national or regional geographic scales. Indeed, as Lee (2009) explains, this conceptualization of a core, a semi-periphery and a periphery was introduced to world-systems analysis in 1974 and was a welcome addition because it "liberated the future of developing countries from the rosy prospect propagated by the modernization theory as well as from the gloomy pessimism of the dependency theory" (Lee 2009: 264). In other words, the semi-periphery designation provided a means by which to analyze countries that did not strictly fit into the core or periphery categorization of the dependency theory. Lee (2009) further argues, however, that this categorization of semi periphery is disappearing partly through disuse. Within the tourism body of knowledge, however, the internal core periphery (ICP) construct remains in use and is employed by Jordan (2007) in her assessment of how organizations in Trinidad and Tobago relate to each other.

Britton's work has been criticized by Chaperon and Bramwell (2013) as being too deterministic and not taking into account the peculiarities and comparative advantages of each peripheral country that help to offset or mitigate the dire dependency effects. Several authors have therefore demonstrated the use of a core-periphery model that is not strictly tied to dependency theory but that simply provides the structure with which to analyze unequal relationships within varied contexts. Work by Lacher and Nepal (2010) employs the core-periphery model to understand how peripheries in Thailand can be more proactive and mitigate their disadvantaged circumstances. The work by Chaperon and Bramwell (2013) determines that though residents of Gozo, an island peripheral to the core island of

Malta, are indeed in a core-peripheral relationship, they are able to use their agency to make strategic calculations and exercise a degree of influence over their involvement in tourism. Vanolo (2010) notes that the use of the core-periphery metaphor, and not the dependency theory from which it originates, proves helpful in expanding this metaphor beyond simply rich or poor countries or "the mere historical evolution of stages of development" (2010: 30) into understanding interactions between geographical areas. Weaver (1998: 292) considers the core-periphery model "a valuable and fundamentally geographical framework for contextualizing and comprehending spatial disparities in power and levels of development". He further decries the low interest in "internally induced core-periphery dynamics" (Weaver 1998: 293) displayed in the literature and remedies it by focusing on domestic tourism between Trinidad, Tobago and Antigua.

Cores develop as a result of better access to transport and communication, resources, or due to being a population or commercial center, or having historical and cultural significance, or due to political and administrative policies (Stadel 2008). In this context, the difference between a core and a periphery can be defined using distance and accessibility (Hall 2007). As Avraham and First (2006: 72) noted:

> *The 'centre' … is considered to be the focus of activities, events, authority and power, in which the elites, the foci of power and the decision makers in central fields and institutions can be found. In addition, the centre is where the meaning of events is created, where collective boundaries are determined, and where the perceptions of who is considered 'us' and who*

is considered 'them' are shaped... a centre–periphery system is characterized by a physical, social and psychological distance between the core and the margins, and as long as the structure of both the centre and the periphery does not change, this distance will remain constant. It is in the centre's interest to maintain this relationship and the periphery's dependence ...

Within the geographic context, peripheries are identified by a number of factors which included the lack or difficulty of access to transport, information, political power and capital (Muller and Jansson 2007; Chaperon and Bramwell 2013). To quote Avraham and First (2006: 72):

The 'periphery', on the other hand, is passive and takes no part in the creation or distribution of customs and conventions; the periphery receives these constructs from the centre and acts accordingly.

Peripheries may also be characterized by a "comparative lack of innovation as new products tend to be imported rather than developed locally" (Botterill et al. 1997, in Hall 2007: 26). Likewise, information flows are weaker within the periphery and from the periphery to the core than the reverse flow of information (Ibid). The issue of flow of information is especially significant because where it is slow, there are lost opportunities in making timely, well-informed decisions that could move development of the periphery forward (Hall 1997). A further characteristic of peripheries may be found in the demographics and migration patterns. There is usually an outflow of youthful population from the periphery to cores or areas that offer prospects of better pay and better life for young families (Hall 2007). Conversely, there is an inflow of retirees and second home owners into the periphery (Hall 2007), who bring with them experience of business and other skills and knowledge that may be lacking in the peripheries.

Work by Mehretu et al. (2000), in seeking to provide a better framework for assessing the type of peripherality or marginality experienced in a region or community, define two primary types of marginality; namely contingent and systemic. Contingent marginality is the result of unequal competitiveness of an area or community due to the adverse effects of free market dynamics (Mehretu et al. 2000: 90). In essence, these communities or areas do not have the wherewithal to effectively compete in an environment where free market dynamics dominate and the inequality is described as being in the form of "unattractive locations, cultural restrictions, inadequate labor skills and a lack of useful information about opportunities" (Mehretu et al. 2000: 90). Furthermore, the cultural restrictions or constraints may contribute to slow uptake of new information or technology that could otherwise make significant impact on progress. The second type of peripherality presented by Mehretu et al. (2000: 91) is systemic marginality, which arises when inequality is a social construct where some communities or individuals are considered more powerful than others. The superiority of one group over another may be delineated by gender or class, ethnicity or age group among other categories.

Despite these two key classifications of peripherality, and the basic characteristics of cores and peripheries, it is important to bear in mind the fluidity of a core-periphery relationship. As Muller and Jansson (2007) point out, there is a constant shift between cores and peripheries due to changing circumstances in infrastructure or governance or technology. This perspective that the periphery or core are not permanent states but mutable states, is shared by Papatheodorou's (2004) work which attributes core or periphery characteristics to tourism resorts, depending on the type of recreation and services offered and their ownership (Kauppila 2011). To ensure that cores and peripheries are understood as states that evolve along a continuum of development, Kauppila (2011) associates it with Butler's (1980) work on the life cycle of a tourism destination. So, if a country previously considered as peripheral were able to make a shift in several of the characteristics that made it peripheral, it could then move further along that continuum to become a core, or at least less of a periphery.

This core-periphery framework and the table outlining the common characteristics that define cores and peripheries, will therefore be employed as the evaluation framework for the four case study countries. Though simple, the core-periphery framework is robust and permits the uncovering of characteristics that support the understanding of how far along the continuum towards becoming a core, the different countries are, and how that affects intra-regional travel and interaction. Furthermore, because this study deals not only with the countries as destinations, but also recognizes that they are sources of intra-regional tourists in their own right (so that they not only play the host role but also generate some outbound [to the region] guests), a brief review of the literature on the theme of non-Western tourists follows. The purpose of the review is to present a missing factor in the core-periphery construct, that of bilateral (not uni-directional) flows of tourists from both core and periphery and to provide further conceptual support and vocabulary with which to understand and analyze the results of this study.

3.4 Non-Western Tourism

In this section the words 'non-Western', 'regional tourist', and 'southern tourist' will be used interchangeably to refer to domestic or outbound tourists who are from developing countries and emerging economies. There has indeed been a documented increase in the number of domestic tourists in developing countries, with the domestic tourists (Evrard and Leepreecha 2009), diaspora and visiting friends and relatives (VFR) contributing to this group (Rogerson 2004a; Scheyvens 2007). Outbound tourism from emerging economies and developing countries has also increased, particularly in Asian countries (Law et al. 2011; Henama 2013). What is missing in the tourism literature is an engagement with these non-Western or Southern tourists. Some academics argue there is nothing special about non-Western tourism, or indeed the provenance of tourists, because as long as they participate in tourism as understood in the contemporary sense (Hazbun 2009), they are engaged in a pastime whose roots are firmly embedded in the West, and England in particular (Evrard and Leepreecha 2009). However, as argued by Winter (2009: 21), there is a need to adopt political and cultural pluralism because "in its current form the field of tourism studies is institutionally and intellectually ill equipped to understand and interpret the new era [of tourism development] we are now entering".

Prevailing tourism theories such as the host-guest relation may have worked in a north-south initial relationship, but are inadequate in explaining relationships in regional tourism, and in "North-mature" South destinations (Aramberri 2001). Ghimire (2001a and b) explored the growth of intra-regional tourism in the developing world and indicated that the volume of travelers to these areas is growing, and is still not addressed by government policy and strategy, and hence continued developing in an ad hoc manner. Gladstone (2005) added to this body of work by examining the growth of regional tourism in India, and indicating that at least in Asia, there is a great deal of intra-regional travel that goes largely ignored by tourism studies. Ghimire (2001a) noted that the 'blindness' to non-Western tourists was a result of, "The existing tourism literature and planning … see[ing] a "tourist" as being automatically a "Northerner", with leisure activity being his or her privileged practice". Alneng (2002: 130), in his aptly titled paper '*The modern does not cater for natives'*, argued for the need to understand the motivations of tourists with different cultural backgrounds because "theories developed in the modernist enclave of Tourist-as-Westerner might not be as universal as they have been posed to be". Given the UNWTO figures that "four out of five worldwide arrivals originate from the same region" (UNWTO 2012: 12), this means a large number of tourists are left out of the contemporary studies and literature.

The non- recognition of the non-Western tourist in the literature is problematic because recognition of a phenomenon or a market segment is essential to catering to its particular needs (Ghimire 2001b). The work of Chan (2006) helps us understand this by presenting the guest-host relationship of outbound Chinese tourists and their Vietnamese hosts in border tourist towns. It shows that the organization of tourist packages of these tourists differs markedly from the organization of Western tourist packages, with the Chinese border tourist travel organized and financed through social units (labor unions, and various social organizations), unlike in the western context where it is mainly individually-procured. The article also indicates the difference in the tourist gazes of the host and the visitors, where the Vietnamese hosts view the Chinese visitors through a lens colored by interactions with Western visitors. The author further reveals that the Chinese visitors evaluate their tourism experience through a developmentalist lens and in keeping with the Chinese society's expectation that "the direction of movement [i]s … from poor localities to rich regions, from rural areas to urban centers, from inland to coastal areas… from China to the West. People are not expected to travel in the opposite direction" (Xi Liu 2000: 6 in Chan 2006: 202).

Indeed, as products of recent emergence from a rural and poor past, the Chinese tourists are shown to "loathe experiences of backwardness and detest nostalgia that may remind them of their own poverty before the 1990s" (Chan 2006: 203). This is notable in making the point of the sometimes significant differences between Western and non-Western tourists, where Western tourists value the shunned backwardness as an authentic experience (Alneng 2002). Within the

African context, Rogerson (2004a) confirmed the 'Northern-bias' in tourism development of the South, despite potentially significant tourism revenues if regional or Southern tourists received some attention in policy and planning. Rogerson (2011a) presented the case of urban tourism in Johannesburg and concluded that the case of Johannesburg as an urban destination mostly conformed to promotion strategies used in Northern tourism. However, a key difference was that the strategy had been achieved through the attraction of Southern, not Northern tourists. This thesis argues that the core-periphery dynamics between the four case study countries follow many of the classic characteristics outlined in Table 3.1. It is expected that many, if not all, the characteristics will be mitigated by the evolving changes in the socio-economic state of southern Africa.

3.5 Conclusion

This chapter has reviewed literature on the core-periphery model and its application to tourism and to marginal areas. In this study, the core-periphery characteristics presented here will be used as a framework against which to evaluate the differences and similarities in the four countries being studied. The characteristics of cores and peripheries may be altered as a result of the project findings, so as to better reflect the southern African reality. The chapter has also presented literature on the non-Western tourist, indicating this as a group largely ignored in the tourism literature, and consequently perhaps, in national tourism policy and planning.

CHAPTER FOUR: REGIONAL TOURISM IN THE DEVELOPING WORLD

4.1 Introduction

This chapter presents in three sections a review of literature on the growing importance of regional tourism in developing countries. It reviews the triggers of the growth of regional tourism and its economic impact in the developing world. The literature review is selective, focusing on the experience of developing countries because the experiences of these countries directly relate to the study area, southern Africa, a developing region. Much of the information presented here is drawn from Asian countries because this is the region with the most current and relevant published studies on regional tourism.

The first section defines the terms and concepts used in this study to explore regional tourism within a developing country context. The second section reviews the factors fueling regional tourism's growth. The third and final section examines the benefits, challenges and issues being experienced around regional tourism development.

4.2 Terms and concepts in regional tourism

Tourism is generally understood to be the travel of an individual from their place of residence to another place for purposes of leisure or business. The activity of tourism is defined by the United Nations World Travel Organization (WTO) as a subset of travel, a trip which involves visitors (UNWTO 2013). Travel in this context is defined as “the activity of travelers… [people] who move between different geographic locations for any purpose and any duration” (UNWTO 2013). A visitor is defined as “a traveler taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited. These trips by visitors qualify as tourism trips” (UNWTO 2013).

It is important to understand that travel and consumption of tourism occurs at three geographic levels: the domestic, the regional, and the international. Furthermore, any discussion on the role and the growth of regional tourism in developing countries needs to present and define the three levels. Understanding the effect of regional integration on regional tourism is also useful to determine the level to which tourism is helped or hampered by overarching sector economic policies. Of the three geographical levels, domestic tourism has the highest number of tourists worldwide (Pierret 2011). This high percentage is due to domestic tourists being familiar with the local socio-economic and cultural environment, as well as the relative proximity of destinations and lower cost of traveling to them (Pierret 2011). Other benefits of the domestic tourism destination include the relatively consistent flow of tourists when compared to the seasonal fluctuations of international tourism. In addition, domestic tourism does not suffer the drop in numbers caused by travel advisories, the rise of newer, better-promoted destinations, or international economic recessions (Schyvens 2007; Pierret 2011). For these reasons, many citizens/residents in a country can experience unconstrained and inexpensive domestic travel, compared to travel outside the national borders. Domestic travel as defined by the WTO is undertaken by a person “who travels for business or leisure purposes, outside their usual environment but within the national borders of their country of residence, for a minimum of 24 hours” (UNWTO 2013).

The second geographical level, international tourism, has the lowest visitor volume of the three levels of tourism consumption. In developing centres like Goa, India, for instance, it contributed about 10% to total arrivals (Scheyvens 2007), while in Latin America, international tourists made up 40% of arrivals in 2011 (Ruggles-Brise 2012). This category of tourism is lower primarily due to the relatively high cost and difficulty of required travel formalities, such as visa and/or vaccination requirements and currency exchange. International tourism is defined as travel by a person to a country in which he/she does not usually reside, for less than 12 months, with the main purpose of the visit being leisure or business, as long as they are not remunerated in the country visited (WTO 2010). Regional tourism lies between the above-mentioned two geographical levels of travel, and is a sub-category of international tourism as defined by the UNWTO.

4.2.1 Definition of regional tourism

Tourism literature offers two definitions of regional tourism: one is centered around the geographical scale of products on offer, and the other is focused upon the geographical origin of the tourists. The former definition of regional tourism refers to the cooperation of countries within a geographical area. Neighboring countries jointly market and promote their diverse tourism products as a single destination in order to attract a greater volume of tourists than might otherwise only visit a single country in the region (Christie and Crompton 2001). Organizations such as the Regional Tourism Organization of Southern Africa (RETOSA) and the Association of Southeast Asian Nations (ASEAN), are oriented towards this kind of regional tourism where the focus is on visiting several countries in one geographical region in the course of a single long-haul trip. This is usually the result of regional cooperation in tourism, where participating countries have harmonized their planning, promotion and marketing in order to reap the benefits of 'collective attractiveness' (Chang 2001). The most recent expression of this type of regional tourism in southern Africa has been the efforts to develop a single visa for long-haul inbound visitors to southern Africa – the Univisa (Douglas et al. 2012). Though the Univisa might encourage an increase in total number of international visitors to the region, the uneven development of infrastructure and tourism industry would undoubtedly favor some destinations over others (Douglas et al. 2012), thereby creating tensions in the region and endangering the sustainability of the effort.

This study focuses on the second definition of regional tourism, namely the tourist's country of origin. There are several definitions of this second type of regional tourism, with the differences centering on whether it is citizenship or residence that should be considered when defining a 'regional tourist.' It also deals with whether or not the purpose of travel should be included in the definition, a particularly contentious issue when considering whether or not travel is discretionary and whether travelers such as cross-border traders should be included in the definition (Rivett-Carnac 2009).

Dieke (1998) defines regional tourism as the movement of tourists resident within a region. These tourists may be nationals of any country, with the key to their inclusion being that they are domiciled in the region in question (Dieke 1998). In southern Africa, Rogerson (2004a: 229) defines regional tourism as "simply… tourism flows, by land or air, from other countries in sub-Saharan Africa". Christie and Crompton (2001) describe it as tourists from neighboring countries visiting a regional destination, whilst Scheyvens (2002:143) defines regional tourists as "tourists traveling outside their own country but within their immediate region." Ghimire's (2001a: 101) definition of regional tourism is "activities of leisure travel by people within the same region, but outside their usual country of residence". The UNWTO indicated that in 2012, 80% of "worldwide arrivals originat[ed] from the same region" (UNWTO 2012: 12).

For the purpose of this study, the definition of regional tourism will incorporate the various elements of the above definitions to read: *the activity of travel for business, trade, leisure or visiting friends and relatives (VFR) by people resident in one country, to other countries within a well-defined geographical region, of which their country of residence forms a part*. Having thus defined regional tourism, mention must be made on how regional tourism is linked to and influenced by regional integration efforts and bilateral relationships among neighbors or regional blocs.

4.2.2 Regional integration and its benefits

Regional tourism is linked to and influenced by regional integration efforts and bilateral relationships among neighbors or regional blocs. Regional integration may best be described as "[the creation of] a supranational entity that transcends political boundaries, tying localities under a new geographic and economic alliance" (Sharma 2006: pi). The supranational entity, or regional bloc, normally consists of countries neighboring each other and have been compelled by circumstances or attracted by potential benefits to form a multi-national entity. Though regional integration has been on the agenda of developing countries since the 1960s, progress in its implementation has been slow. The primary cause of this delay has been mistrust among neighboring country governments, resulting in disagreements over what rights and responsibilities integration confers upon cooperating nations (Sharma 2006). Finally, as a result of the relative instability of many national economies, there is the concern that stronger economies will either dominate weaker states or will be flooded with economic refugees from weaker states (Ghimire 2001a; Anastasiadou and de Sausmarez 2006).

Despite these concerns, the rationale for regional cooperation and integration remains attractive. It is expected to benefit member nations by creating economies of scale and from the free movement of people and products (Anastasiadou and de Sausmarez 2006). Furthermore, the establishment of cooperation in a few areas creates demand for further integration, which in turn improves overall infrastructure (Kessides 2012). Development integration is when a group of countries is involved in jointly contributing to and facilitating programs and projects (Lee 2003). One such example is the Southern African Spatial Development Initiatives (SDIs) which are areas identified within the Southern African Development Community (SADC) for infrastructure development. Finally, market integration is the incremental movement towards the removal of legislative and administrative barriers to free movement of goods, services and people within the region (Lee 2003).

Removal of trade and transport barriers through regional integration ideally increases the access of more players to diverse sectors of the economy, thereby creating competition. Such competition should improve standards of service and reduce prices paid for products and services (Economic Commission for Africa (ECA) 2004). Regional integration should also reduce conflict among member countries because cooperation is in their best interest. Furthermore, with increased demand for liberalization of world trade by the World Trade Organization (WTO), along with the growing demand by developing countries for fairer terms of trade, regional integration provides developing countries with stronger lobbying positions for fair trade (Teye 1988a; Adetula 2004). Finally, the removal of barriers to the free movement of people and goods will contribute to an exchange of ideas and greater understanding of cultures resulting in enhanced competitiveness of the region (Chen 2003; Anastasiadou and de Sausmarez 2006; Anastasiadou 2011).

Undesirable outcomes of regional integration include the uneven distribution of resources and benefits (social and economic) among member states. When regional integration or cooperation takes place, participating countries are usually at different stages of economic development with one country being economically dominant. Because many investors are risk-averse, they prefer to make investments in areas with existing infrastructure or with appealing investment incentives (Sinclair et al. 1992). For this reason, those member states with stronger economies and better infrastructure often obtain more benefits from integration than the weaker states (Anastasiadou 2011: 237). It is for this reason that regional cooperation has proved challenging, particularly when one country exercises regional hegemony which, due to cultural differences, is perceived as an expression of arrogance or inferiority towards others (Chang 2001).

Regional integration policies focus upon improving trade and transport infrastructure, and streamlining customs/immigration procedures, but give little if any attention to tourism. Where tourism is mentioned, it is as a small part of the transport or economic development portfolios. Nevertheless, integration efforts have indirect benefits for the development of tourism because they create optimal conditions for tourism development which include improved transport and accommodation infrastructure and greater freedom of movement, thereby increasing the trigger factors for regional tourism (Chang 1998; Timothy 2003; Kessides 2012).

4.3 Triggers for regional tourism growth

Pierret (2011) identifies the main motivators of tourism as: resting, discovery, encountering others and experiencing something unique. Since the 1990s, demand for regional and domestic tourism in developing countries has increased to a level where it now contributes significantly to local and national economic development (Yahya 2003). The growing demand for regional tourism has led some countries in Asia and Africa to become more attentive in their planning to attract regional tourists (Yahya 2003). This section examines five key factors triggering and encouraging growth of the regional tourist market.

4.3.1 Domestic tourism

Though non-discretionary travel has long been undertaken at domestic or international level for purposes of trade, pilgrimage or exploration, the roots of modern leisure travel are traced to 19th century Europe and the Grand Tour (Inglis 2002). The Grand Tour was a rite of passage for young men from the upper classes of Europe in the 17th and 18th centuries and it involved travel to specific European capitals (Black 1985). This was considered essential in order to round off their education and provide exposure to culture, art and music, while strengthening or forging relationships and links with upper class society in the various destinations (Black 1985). During the mid-19thcentury, due to increased modernization of transportation and travel infrastructure, as well as numerous other contributing factors, the Grand Tour became more accessible to European youth and families of lesser financial means (Gladstone 2005). Furthermore, the cessation of “intermittent hostilities in Europe, lasting most of the preceding century,” (Inglis 2000: 14) also contributed greatly to the practicality and safety of tourism.

Though Thomas Cook is credited with developing the first mass leisure travel packages in the late 19th Century (Smith 1998), it is important to note this development was only possible in the context of improving standards of living. Modern leisure travel in Europe grew as a result of the rising standards of living amongst the working class, thus increased leisure time due to better wages and reduced working hours (Gladstone 2005). Other factors included lower transport costs owing to the development of rail, sea, road and later, air travel, which could quickly move large numbers of people (Gladstone 2005). Further trigger factors included a strong desire among the urban population to travel as well as the development of tourism facilities which were then advertised and promoted to potential tourists (Ghimire 1997). Finally, the expansion of workers’ benefits to include more leisure time and paid holidays gave the "common man" the means and opportunity to travel (Ghimire 1997).

A robust domestic tourism market has been identified in tourism literature as a key driver of growth in regional tourism demand (Anastasiadou and de Sausmarez 2006; Cortes-Jimenez 2008; Pierret 2011). Evidence of the significance of domestic tourism is provided by global figures showing that the average ratio of domestic to international tourists in most nations is 10:1 (Gladstone 2005), and globally is 83% (Pierret 2011). The most obvious way in which domestic tourism contributes to regional tourism is by habituating individuals to the activity of travel so that with time, the prospect of traveling further from home is not threatening (Leshoai 2006). Domestic tourism creates conditions necessary for a strong regional tourism market and is regarded as "the foundation for building intra-regional tourist traffic [where] strong domestic destinations may be able to build enough infrastructure to begin targeting visitors [from neighboring countries]…" (Mena et al. 2004: 22).

The contribution of domestic tourism to the expansion of regional tourism is further explained in part by the *distance-decay effect* where, "more proximate destinations are visited first and, after a while, more and more distant destinations are explored" (Oppermann 1997: 66). The likelihood of an individual taking a domestic holiday is influenced by, *inter alia*, "high income, smaller household size, tourist age, having more leisure time, residence in large cities, and a favorable opinion of taking a vacation" (Nicolau and Mas 2005: 65). Likewise, a trend towards keeping smaller households and having fewer children also contributes to an increase in leisure time (Nicolau and Mas 2005).

Furthermore, access to affordable tourism products (Diegues 2001; Koasa-ard et al. 2001; Rao and Suresh 2001), along with media and advertising, influence sophistication and aspirations of a population helping to generate favorable perceptions of going on holiday. Media and advertising also increase the prospective tourists' familiarity with other cultures (Morgan et al. 2003; Hudson and Ritchie 2006). In Vietnam, the decision to participate in domestic tourism is influenced by weather, family participation, employer sponsorship (a vestige of the socialist past), cost of the trip (which sometimes is tied to marketing and promotion of the trip), and the need for relaxation (Bui and Jolliffe 2011). Finally, the liberalization of foreign currency exchange rates, relaxation of visa/immigration rules and increased regional integration all help to increase volumes of regional tourist flows (Ghimire 2001a).

Although Latin America overall has a large tourism industry, substantially less literature exists for this region than for Asia or Africa (Santana 2001), ostensibly due to primary language being Spanish in Central and South America. The literature available in English primarily presents different aspects of the inbound tourism market, presenting market segmentation of visitors to the region (Sarigollu and Huang 2005), or argues that tourism in the region is *el mal* *necesario*, the necessary evil, which has served to spread the corrosive and neoliberal forces of globalization to the region (Wilson 2008). The work of Howell (2011) reviews three texts on Latin American tourism and highlights their core arguments that tourism's impact is most difficult and negative on the vulnerable in society. Wilson (2008) retraces Britton's (1982) argument that tourism is imperialism in a new form and therefore benefits only the local elite and transnational companies. The work of Lionetti and Gonzalez (2012) demonstrates that the economic impact of tourism on economic growth in different countries depends on the sophistication of the economy in question. For small economies, an increase in the number of inbound tourists results in more trade over the short-term (Lionetti and Gonzalez 2012).

Together, five countries in Latin America and the Caribbean (LAC) - Mexico, Argentina, Brazil, Chile and Puerto Rico account for over 75% of the outbound tourists from the region (Strizzi and Meis 2001). Past research on this outbound market presented the expectation that economic growth in the region would decrease, resulting in these outbound tourists undertaking fewer long-haul flights, and that growing regional integration would increase intra-regional tourism, particularly business tourism (Strizzi and Meis 2001). Though Strizzi and Meis (2001) predicted low economic growth based on trends in the 1990s, that is not what happened. In reality, government's efforts to drive the region's economic activity resulted in growing intra-regional and domestic tourist numbers, with as many as 60% of international arrivals in Latin America being attributed to intra-regional travelers (Ruggles-Brise 2012). Furthermore, this segment of tourists is expected to grow as the middle class in the region grows. However, unless governments see fit to invest in tourism infrastructure (including airports, roads, hotels), such growth will not be sustainable (Ruggles-Brise 2012).

4.3.2 Institutional support

Government plays a key role in the creation and implementation of policies and strategies encouraging regional, domestic, or international tourism (Cai et al. 2001). There are cases where government has actively promoted the development of international tourism through allocation of sufficient funds for marketing and promotion activities. These have included campaigns within international tourism source markets, and through the provision of incentives to attract investors who cater to inbound international tourists (Russell 2003). Regional tourism is particularly neglected in governments of developing countries, where tourism policy is not a well-articulated strategic plan and where little budget is available to implement its development (van Vuuren 2009).

In developing countries pursuing tourism development, institutional arrangements mandate the national destination marketing organization to plan and promote the country to domestic, regional and international tourists. However, as noted earlier, international tourism receives the lion's share of promotion and marketing resources (Ghimire 2001b). Regional tourism development has, through this lack of direct attention and planning, been relegated to being an ad-hoc, market-driven enterprise (Wen 1997; Ghimire 2001a, 2001b; Chang et al. 2006).

In cases where government deliberately makes interventions in regional tourism promotion, their efforts include creation of holiday weeks, visit years, and provision of tax breaks or incentives to tourism investors (Cai et al. 2001; Christie and Crompton 2001; Chan 2006). The 'visit year' is one useful mechanism to promote a destination and involves a partnership between government and the private sector to finance promotion campaigns aimed at increasing the volume of tourists visiting the country or region (Kim and Wong 2006). These campaigns include the creation of special promotional packages, establishment of cultural festivals and other activities for targeted tourists to attend. Visit Malaysia Year 1990 and 1994 (WTTC 2002), 'Visit Indonesia 2008', and 'Visit India 2009' are all examples of this direct intervention.

The Chinese government created and enforced the 'golden week' system in 1999 (and revised this in 2007) as a means of stimulating domestic demand and consumption (York and Zhang 2010; Wu et al. 2012). The 'golden weeks' are two week-long holiday periods each year during which most of the country goes on holiday (Wu et al. 2012). These holiday weeks have themes promoting specific tourist niche products such as sports, environment/nature, or health (Wen 1997; Cai et al. 2001; Wang 2004). The objective of stimulating domestic tourism and increasing the population's appetite for travel to more distant national destinations was successfully met (Chan 2006), although increased consumption was not up to expected volumes (Wu et al. 2012). 'Golden weeks' have increasingly encouraged outbound tourism, both within the region and internationally (York and Zhang 2010; Wu et al. 2012). To improve the experience for tourists, regulations in 2013 aimed at travel agencies and at travelers themselves (etiquette), and aimed at reducing greedy and unregistered tourism businesses, and projecting a positive image of the Chinese tourist abroad (The Guardian 2013).

Further examples of government incentives for domestic tourism and tourism in general, can be found in South Africa where government has worked with the private sector on the *Sho't Left* campaign. This campaign is designed to offer budget travel packages encouraging domestic tourism, particularly to previously disadvantaged groups (Rogerson and Lisa 2005). Rogerson (2010) argues that tourism may, on the back of cluster development, successfully harness tourism routes, among other activities, to provide a boost to local development planning and local economies. In India, government has supported domestic tourism through a 'leave travel concession', a scheme that subsidizes holidays for civil servants (Shah and Gupta 2000). Likewise, Cuba's government policy in the 1990s encouraged the development of domestic tourism by subsidizing in-country travel and granted "one month's holiday in the summer and alternate between two-day and one-day weekends throughout the rest of the year" (Hinch 1990: 217).

4.3.3 Changes in geopolitics and economic policies

Development of a vibrant tourism industry requires both political and economic stability at the national level. Instability in a regional member country may dissuade international tourists from visiting other countries within that region because many times the impression created is that the entire region is unsafe or unstable (Teye 1988). The general cessation of hostilities and period of peace during the 1990s, where in many parts of Asia and Africa groups or countries had been at war, greatly contributed to creating a favorable environment for regional and international trade and travel with neighboring and regional countries (Lindberg et al. 1997). In this section, the positive impacts of changing political and economic contexts in the developing world upon the growth of regional tourism, are examined.

A result of stability, whether long-established or recent, has been the development of cities as "must visit" destinations, and as sources of outbound tourists (Ng and Hill 2003). Rogerson and Visser (2006) have highlighted that for South Africa's inbound regional tourists, "cities are the major attractions, for purposes of business, shopping and increasingly, for health tourism" (2006: 54). A key tourist activity undertaken in cities is shopping and although it is seldom mentioned as a purpose of travel, "…Shopping is an important tourist activity… a significant contributor to an economy… [and] no trip is complete without having spent time shopping" (Yuksel 2004: 751). Furthermore, in mature destinations where tourism revenue is declining, shopping could be one avenue to increase tourist spend and positive impacts on local economies (Alegre and Cladera 2010). Some key shopping destinations include Singapore and Hong Kong (Wong 2003; Moscardo 2004; Yeung et al. 2004), Dubai (Matly and Dillon 2007), Mauritius and South Africa where 'Jobai' (Johannesburg) has evolved into a significant regional shopping destination (ComMark Trust 2006; Rogerson 2011a).

In developing countries, it has been financial crises that allow the value of regional tourism to be appreciated. A case in point is the financial crisis of the Asian Tigers (Indonesia, Malaysia, the Philippines, Singapore and Thailand) in 1997 which proved a significant trigger event for domestic and regional travel in Southeast Asia (Yahya 2003; Chan 2006). Foreign investors and currency speculators rapidly pulled their funds out of Thailand’s economy, resulting in the immediate devaluation/crash of the Asian Tiger currencies (Nanto 1998). The negative impact of this devaluation affected the entire Association of the Southeast Asian Nations (ASEAN) region, and threatened to reverse the economic gains made in the preceding decade (Lim 2004). It adversely affected outbound travel because individual purchasing power was significantly reduced, and those who had previously traveled to Europe and America for leisure could now only afford domestic and short-haul regional holidays (Lim 2004).

The recovery plan for the Asian region’s economies included tourism, with the focus being to “diversify into new products, such as heritage tourism and ecotourism, to widen the region’s appeal in existing markets and to capitalize on emerging markets such as India, China and the Middle East” (Anastasiadou and de Sausmarez 2006: 321). The recovery plan in no way prevented marketing to the international tourism market, but it did turn attention and resources towards regional tourism development. Therefore, in so doing, it harnessed potential for economic growth that had previously been ignored.

The destruction of New York's World Trade Center on September 11, 2001 (9-11), was another significant catalyst for regional tourism development in the developing world. Following this event, tourists from the oil-rich nations of the Middle East found entry to hitherto friendly summer vacation destinations in Europe and America more difficult due to more stringent visa regulations (Bonham et al. 2006). Such restrictions encouraged these market segments to look for more hospitable destinations often within their own region (Bonham et al. 2006).

Though regional tourism traffic within the Middle East was already growing before 9-11 (Burns and Cooper 1997; Al-Hamarneh and Steiner 2004), regional travel to countries such as Egypt, Jordan (Doan 2006; Reid and Schwab 2006), Saudi Arabia (Sadi and Henderson 2005), and Dubai in the United Arab Emirates (Pacione 2005; Grant et al. 2007) expanded faster after 9-11 due to increased demand and infrastructure investment (Antoniou 2003). Investigations into push-pull factors attracting tourists to Jordan indicated that the perception of tourist safety, among others, serves to attract both regional and international tourists to the country (Abdelnaser and Bashar 2011). Another study determined that the depiction of certain sites and destinations in films encouraged domestic and regional tourists to visit these sites (Soliman 2011).

4.3.4 Visa and immigration regulations

As explained earlier in the discussion on regional integration, freedom of movement (goods, people, services) within a region is an important part of improving trade and productivity. Regarding tourism, more relaxed visa and immigration regulations for residents of a region, plus an increase of visitors from foreign countries who are visiting a particular region, all help to make the destination more attractive. A successful case in point is the Schengen visa and the added facilitation of intra-regional movement by the European Union's (EU) regional integration. These efforts have directly contributed to the high levels of intra-regional tourism flows in Europe (Anastasiadou and de Sausmarez 2006).

The Schengen visa allows foreign visitors who are from countries outside the EU get a special visa (Schengen) which allows entry into multiple European countries that are signatories to the Schengen agreement (Schengen Visa Services 2013). This saves cost and time when compared to being obliged to obtain individual visas for each country they wish to visit (Schengen Visa Services 2013). As a manifestation of the agreement's flexibility, there have been amendments made since 2009 to allow citizens from some countries of the former Yugoslavia, as well as Taiwanese citizens, to travel visa-free within the region (European Commission 2013).

In the Asian region, an agreement for a regional visa operating in the same way as the Schengen visa was signed between Thailand, Cambodia, Laos, Vietnam and Myanmar, allowing citizens of member states to visit any country in the region for up to 14 days without requiring a visa (ETN 2007). The CLMV visa as it is called, was launched in 2013 and targets the arrival of 25 million tourists by 2015 (ASEAN 2013). Thailand was conspicuous in its absence, refusing to change its visa policy to reflect the agreement (HTHN 2013). In southern Africa, the Southern Africa Development Community (SADC) is working on introducing a Universal Visa (UNIVISA) – a single travel visa for both international and regional tourists wishing to visit several countries in the region (Douglas et al. 2012). This means prospective tourists will not need to obtain a visa for every country they visit in the region (RETOSA 2009).

4.3.5 Expanding transport networks and improving technology

Expansion of transport networks, coupled with the availability of funding to maintain transport infrastructure, as well as technological improvements in comfort and efficiency of modes of transport, have all contributed to reducing the individual's cost of travel and encouraged demand for regional travel (Prideaux 2000). Overall, trains and buses have proved to be the most popular and most heavily used means of transport in domestic and regional travel (UNECA 1992; Prideaux et al. 2001; Sivijs 2003; World Bank 2006a). Research from Australia indicates long-distance travelers driving their own vehicles prefer to take circuitous routes, compared to driving directly to their destination. In doing this, they spread their tourist money to numerous towns and attractions along the travel route (Taplin and Qiu 1997).

International or overseas travel relies to a great extent on air transport while regional and domestic tourism make heavy use of road and rail transport. It was indeed the initial technical development of aviation that launched mass leisure travel in the 1950s (van der Duim 2005). The key changes in aviation have included increased liberalization of airspace (ATAG 2003; Myburgh et al. 2006). Additionally, the rise of Middle East airlines like Etihad Airways, Qatar Airways and Emirates Airways, each backed by their respective countries' oil-rich economies, has boosted travel within the Middle East and other regions of the world (Sharma 2006). In the case of African air travel, several factors have improved, including an increase in aircrafts (size and number) and the number of routes (Bofinger 2009). Intra-regional connectivity is, however, declining, and air travel is expected to drop due to increasing oil prices (Bofinger 2009). Furthermore, there is a lack of daily service between cities as a result of low demand and regulations, resulting in a dominance of the air market by airlines from outside of Africa (SH&E 2010).

The evolution of hub-and-spoke networks in air transport has enabled rapid improvement in provision of aviation connections to the broader global airline network, thus facilitating travel to developing regions that were previously under-served (O'Kelly 1998). Another significant development in aviation has been the growth in the number and coverage of Low Cost Carriers (LCCs) – also known as 'no-frills' or budget airlines (Myburgh et al. 2006; SH&E 2010). In developing countries, these LCCs have specialized in regional travel, making air travel accessible to price-sensitive travelers who were previously excluded from air travel by its expense (Sharma 2006). These LCCs have provided competition to established and expensive scheduled airlines, forcing an overall reduction in the cost of air travel along key regional routes (Sharma 2006). The increase in the volume of passengers travelling by air, starting in the late 1990s, is an indication of how effective this LCC model has been in offering affordable air travel. There are several well-documented instances of this including Air-Asia's success in Southeast Asia which has encouraged the establishment of other competing LCC airlines (Ahmad and Neal 2006; O'Connell and Williams 2006).

The availability of increased discretionary income and credit cards has proved beneficial not only to banks but also to the tourism industry (Kaynak et al. 1994; Chen and Tseng 2005). The number of people engaged in the consumption of tourism has increased with the expanding acceptance of credit cards by service providers within the tourism value chain (Weaver 2005a). This is especially true with regards to the growing trend of prospective tourists shopping and purchasing travel packages online (Susskind et al. 2003; Worthington et al. 2007; Scarth 2008).

Improved technologies in communication, financial tools, and electronic booking have also encouraged increased demand for regional tourism. They provide easy access of information to prospective tourists about product options and costs (Weaver 2005b; Yeoman et al. 2008). According to EyeForTravel Research, the seven factors facilitating increased demand for regional travel are: rising disposable incomes, the tendency of consumers to spend more on travel, internet and broadband penetration, wider credit card availability, expansion of online payment methods, tourism marketing taking advantage of the internet, and the increasing tendency for consumers to use it to make purchases (Scarth 2008).

4.4 Benefits of regional tourism development

Developing countries traditionally focused on marketing to and planning for the international tourist market in a bid to increase income earned from tourism. Research indicates, however, that "with very few exceptions, the single largest source of international arrivals for most Third World countries is neighboring low-income countries" (Gladstone 2005: 109). Despite these large volumes, regional tourists are thought to spend significantly less money within the host country's economy than international tourists. Therefore, planning for this market has been ignored in favor of greater focus upon the international tourist market that is thought to be more lucrative. This section illustrates why marketing and promotion to regional tourism markets should now take place.

Two defining characteristics of the international tourism industry are its income elasticity, and its low profit margins, which necessitates the need for high volumes of units or tourists in order to generate profit (Qu and Lam 1997). Income elasticity means when the national economies of tourist-source countries experience a downturn, less people will undertake outbound travel because tourism is non-essential, to be abandoned during times of economic hardship.

Another factor discouraging international travel to developing countries is the political or social unrest sometimes experienced there, which causes governments in international tourist source countries to issue travel advisories warning their citizens to stay away from these countries or regions of unrest (Dieke 2003). Though regional tourists are no less concerned about their personal safety than international tourists, they are more informed about the details of regional incidents of instability and can therefore continue to travel regionally while international tourists tend to stay away from the entire region (Bhattarai et al. 2005; Anastasiadou and de Sausmarez 2006). A recent example is a destination like Kenya losing tourists to beach destinations like Mauritius, Zanzibar and the Seychelles as a result of misgivings around security and quality (Chao 2013).

4.5 Prospects for economic development through regional tourism development

International tourism, structured as it currently is, has failed to substantially deliver on its promised impacts of increased foreign exchange, expanded employment, and boosted multiplier effect within host local economies. This failure of tourism development to realize expected outcomes has been caused, in part, by the leakage of tourism receipts from developing economies through importation of building material, food stuffs and expatriate management staff. All of this, of course, is done to meet the international tourists' demand for high standards (Cai et al. 2001).

In contrast to the leakage of tourist income embodied by international tourism, domestic and regional tourism primarily makes use of locally-supplied building material, food and labor. Domestic and regional tourists also tend not to demand five-star accommodation, preferring to stay in budget quality accommodation that meets their cost expectation (Cai et al. 2001). A strengthened regional tourism market means reduced leakage through greater linkages within local economies (Gang 1999; Gerosa 2003). This translates into significant job creation due to an improved investment environment facilitating entrepreneurship. Finally, a substantial multiplier effect is generated within the local economy because tourists spend their money locally (Saayman and Saayman 2001; Gerosa 2003; Rule et al. 2004).

There is also evidence that domestic tourism sustains more formal tourism sector jobs than does international tourism (Koch and Massyn 2001). Regional tourism and independent travel create proportionately more local economic opportunities than international packaged tourism (Deloitte & Touche et al. 1999). Additionally, regional tourism development increases investment opportunities, income streams and social mobility within an area (Gang 1998, 1999; Koch and Massyn 2001).

Tourist traffic and spending of regional tourists has been found to be similar and in some cases higher than the expenditure of international tourists. So it can be said that, "tourism expenditures [of regional and domestic markets] far outrun the contributions of foreign tourists in all the regions of the world except in the

Caribbean" (Aramberri 2004: 1). Evidence of high regional tourist expenditure contradicts the prevalent view held by many tourism planning organizations in the developing world – that the regional tourist market is less valuable than the international tourist market.

Whereas international tourism is pursued by developing countries, mainly so the national balance of payments can improve, regional tourism should be pursued because it discourages the outflow of foreign exchange when local residents are interested in traveling within their own region (Ghimire 1997, 2001a; Christie and Crompton 2001). Regional tourism also offsets the seasonal fluctuation of visitor volume characterizing international tourism in the developing world.

During the boreal winter months, warmer developing country tourism destinations experience high inbound overseas arrivals (Christie and Crompton 2001). In addition to the economic development potential of regional tourism, there are also social benefits. These include the use of domestic or regional tourism to increase peace and tolerance both within and among nations that have experienced conflict or unrest (Pretes 2003; Mena et al. 2004; Winter 2004; Mazimhaka 2006).

Regional tourism development also helps to dispel long-held notions, within the general population, that tourism is only for overseas visitors and is not for the local domestic or regional markets (Husbands 1989; Sindiga 1999). Increasing regional tourist flows will create a demonstration effect showing to the domestic and regional markets that they too can partake of regional tourism because it is easily accessible (Qiao 1995).

4.6 Challenges and issues around regional tourism development

While the development of regional tourism in the developing world has the potential to play a significant role in addressing job creation and national poverty alleviation, several key issues need to be addressed before this potential is fully realized. This section will provide an overview of the issues challenging the growth of regional tourism in developing countries.

Ghimire's (1997) assessment of the tendency within developing countries to create regional tourism products that mimic Western-style tourism is: the consumption patterns created are unsustainable and this kind of regional tourism does not address the development gaps left by international tourism. Regional tourism has imposed a centre-periphery relationship – similar to the one enforced by international tourism in the developing world – where "newly industrialized economies such as Singapore and Thailand are taking on positions of power… [with] an increase in Singaporean tourists traveling within the region… 'export[ing]' Singaporean arrogance and high expectations" (Chang and Raguraman 2001: 61). Work by Chan (2006) describes how Vietnamese hosts have had to "deploy relational rhetoric to contain potential conflict" maintaining a polite facade in the face of their Chinese visitors' rudeness and chauvinism in order to retain their jobs and the tourist flows (Chan 2006: 189). The regional tourist market is typically a low-spending, budget-conscious demography (Scheyvens 2002). As explained earlier, the perception that the regional market is of low-value has meant few resources have been spent on researching or planning how to cater to regional tourists. To date, the opportunity has not arisen to determine how this market, which though low spending, is still contributing substantially to local economies due to its high volumes. Indeed, they may very well better support the tourism development agendas of developing countries than the international segment.

Furthermore, the prevalent assumption is that tourism products developed for the international market will also suit both domestic and regional tourists. This means little effort has gone into developing products specifically oriented towards these dissimilar markets. Where products developed for regional tourists exist, their delivery channels are narrow and the products not diverse enough to appeal and cater to a wider variety of market segments (Wen 1997).

4.7 Conclusion

This chapter has given an overview of the factors that trigger the growth of regional tourism, and why this growth is desirable. These factors have been centered upon increased economic prosperity, improved infrastructure and access (visas and transport), as well as increased information about what tourist activities and products are available within the region. Regional integration and its benefits have played a significant role in increasing cross-border movement of people, goods and services and therefore indirectly supported regional tourism development. Technological improvements in communications and increased accessibility to road and air transport have also provided powerful stimuli for regional travel. The conclusion drawn is that while regional tourism is by no means the cure-all for tourism-driven economic growth, it has great potential to contribute significantly towards national and local development. The next chapter examines the developments in Africa that have created an environment conducive to the growth of regional tourism.

CHAPTER FIVE: THE CHANGING ENVIRONMENT FOR REGIONAL TOURISM IN AFRICA

5.1 Introduction

The objective of this chapter is to review the economic and socio-cultural developments since 1990 that have contributed to creating a conducive environment for the development of regional tourism on the African continent. The changing environment for regional tourism in Africa will be presented in two sections. Section one will present the key bottlenecks to African regional tourism development identified during the 1980s and early 1990s. Section two will argue that the bottlenecks presented in section one have been satisfactorily addressed. This is particularly true within the Southern African region where the economic and political development establishment has been working to remove such roadblocks since the early 1990s. It will also present nine areas of change pivotal to the current growth in regional tourism demand and volume.

5.2 Bottlenecks to African tourism development

Development of the tourism industry in African countries began in earnest in the early 1980s, during a period of prevailing difficulties due to political and economic instability in Africa (Teye 1986, 1988a, 1988b). During this time, there was insufficient foreign exchange (Martin 1990) to import goods demanded by the international tourists being targeted. Furthermore, these years represented the 'lost decade of development' and the developmental crossroads for developing nations, which either chose to pursue the interventionist model of national development, or to follow the neo-liberal model promoted by the global lending institutions. Asian countries, for the most part, pursued the interventionist model where government played the central role in initiating, financing and implementing development projects (Lawrence and Thirtle 2001). African countries, on the other hand, mostly chose to pursue the neo-liberal model of development (Carrasco and Berg 1999).

5.2.1 Adoption of Structural Adjustments by African Countries

Though most African countries ultimately followed the neo-liberal development model, some efforts were made towards self-reliance and towards the intra-African development envisaged by the Lagos Plan of Action (LPA). Examples of these efforts include the United Nations Economic Commission for Africa (UNECA), which carried out research and planning on how intra-African regional tourism could contribute to the continent's economic development goals (Lockwood and Medlik 2002). In this context, regional tourism development was considered both necessary and desirable to reduce over-reliance on international tourism (Dieke 1998).

Further efforts to promote regional tourism development are documented in the 1987 Kinshasa Declaration on African tourism (UNECA 1996) where bottlenecks to African tourism development were outlined. These included *inter alia,* divergent tourism development policies, competition instead of collaboration in international tourism promotion, difficult visa regulations, and inadequate accommodation and transport (UNECA 1996b). The proposed solutions were to collaboratively train tourism human resources, joint promotion of tourism products, and the pooling of resources to develop regional tourist circuits. Finally, it proposed the following measures to promote regional tourism: improvement of travel and accommodation facilities, the facilitation of free movement of people and services would promote regional tourism, as would the creation of government departments devoted to tourism development (UNECA 1996b).

Beyond the UNECA's work on regional tourism in the Kinshasa Declaration, the Abuja Treaty (the foundation for the African Economic Community (AEC)) in 1991 directly addressed the potential of regional tourism as the key to a stronger African tourism industry. It underscored the importance of tourism in Article 65, stating that intra-African tourism should be strengthened through joint and active promotion. Tourism enterprises should be "adapted to the needs of the African people and attractive to foreign tourists" (OAU 1991: 32). The treaty also urged the creation of an environment encouraging to the building and the use of African skill and human resource in tourism development.

In 1990, the OAU endorsed a 1989 decision by African Ministers of Tourism to recognize and acknowledge the importance of tourism as a contributor to social-cultural and economic development by proclaiming 1991 the *African Year of Tourism* (OAU 1990). The proclamation increased visibility of tourism in Africa, with the OAU indicating it was "convinced that intra-African tourism constitute[d] a significant instrument for ensuring understanding among the African peoples, peace, and socio-cultural and political integration of the continent" (OAU 1990: XXVI).

Despite the recognition of regional tourism's importance and potential at the level of Africa's continental bodies, no concerted effort was undertaken to develop it, resulting in the research and recommendations being abandoned unimplemented. Furthermore, development of regional tourism in Africa suffered market failure as a result of African governments accepting structural adjustment programs (SAPs). These SAPs restricted government actions to so-called core functions and discouraged direct involvement in building hotel infrastructure or subsidizing the tourism industry. The compounded effect of the SAPs on African economies and populations included an increase in household poverty as household incomes plummeted and food prices rose due to government's removal of social safety nets such as subsidized food and oil (Carrasco and Berg 1999). In the light of this scarcity, the productive segment of the African population that would have been the target for intra-regional tourism, chose to spend its money to support immediate and extended family members, resulting in tourism becoming an unnecessary luxury (Dieke 1995). Nevertheless, even in the midst of these negative prevailing economic conditions, road transport statistics collected by the UNECA at the time indicated there was significant demand for regional travel for business and visiting friends/relatives (VFR) (Teye 1991; Dieke 1998).

In Africa, the 1980s created a situation where tensions between regional and international tourism development increased. Foreign exchange reserves in African countries fell as a result of diminished income from raw material exports (Carrasco and Berg 1999). Conversely, international tourists were a source of much-needed foreign currency. Regional tourists were perceived to be a drain on the foreign exchange reserves because African currencies were non-convertible (Ankomah and Crompton 1990; Martin 1990).

The Preferential Trade Area for Eastern and Southern Africa (PTA), a regional trade body set up in the 1980s, attempted to overcome the scarcity in foreign exchange by introducing the Unit of Account for Preferential Trade Area (UAPTA) travelers' cheques to be used by individuals and business people to trade and travel within the PTA region (Martin 1990). This alternative was successful, but once foreign exchange access improved, travelers returned to the use of 'hard currencies' (Mwila 2004). Given the pressing need to earn more foreign currencies, and the difficult financial position of many African families, it was only natural to favor the development of international tourism over regional tourism.

5.2.2 Lack of sufficient trained tourism professionals

Inadequate human capacity was identified as a constraint to African tourism development in several studies (UNECA 1992; Deloitte & Touche et al. 1999; Christie and Crompton 2001; Gerosa 2003; NEPAD 2004a). This limited tourism capacity has led to lopsided planning and development of tourism because the largest share of tourism training is in conservation and natural resource management and not in marketing, management or in linking tourism to national development planning (Sinclair 1998; Roe et al. 2002). Where training opportunities in relevant tourism areas are available, they are mainly run by the private (not public) sector and are too expensive for the majority of the population (Thapa 2012). In some African countries that lack accessible government-supported training in hospitality, local hotels and restaurants provide basic or introductory training for workers new to hospitality and tourism (Fortanier and van Wijk 2010: 202).

5.2.3 Regional economic and political instability

Political instability in the 1980s made continental travel difficult due to *coups d'état* most frequent in West Africa. Liberation wars waged in southern Africa and differences in political ideologies in East Africa, all led to the closing of borders shared by neighboring countries (Teye 1986, 1988). Furthermore, these ongoing conflicts siphoned funds away from infrastructure development in favor of purchasing armaments for national defense, resulting in infrastructure destruction (Ankomah and Crompton 1990). As a further result of these tensions and conflicts, traveling across borders was a complicated, lengthy and costly process, which discouraged discretionary travel (Sindiga 1999; Ghimire 2001b).

5.2.4 Inadequate transport networks and infrastructure

Transport infrastructure and networks were poorly connected, making the cost of travel high and leading to a concentration of tourist destinations in areas providing 'adequate' infrastructure (Christie and Crompton 2001; Rogerson 2002; ATAG 2003; Visser 2003). The largely non-liberalized, non-privatized African air space also resulted in inefficient flight routes and networks providing unsatisfactory and unreliable service (Dieke 1998; Cleverdon 2002). Road and rail transport, though popular, faced the problem of poor maintenance, destruction and sabotage due to conflicts. Some countries were forced to limit their tourism season to the 'dry season' only because roads were impassable during the rainy season (Teye 1988).

5.2.5 Negative attitudes towards regional tourists

The widely held perception that indigenous Africans are not leisure-minded (Teye 1991; Dieke 1998) played a role in retarding the development of regional tourism in Africa. According to Akama (1999), tourism in Africa was largely considered "a luxury and pleasure-seeking industry ... usually entail[ing] rich tourists from the metropolis (mainly from developed Northern countries) visiting and coming to enjoy tourist attractions in the periphery (mainly the poor and resource scarce countries in the South)" (Akama 1999: 7). This dominant perception of a tourist being a non-African (Husbands 1989; Ghimire 1997, 2001a; Sindiga 1999), dates back to the 1980s. At the time, the tourism industry was being established in Africa but the African market did not have sufficient disposable income to participate in it (Dieke 1998; Brown 2000). Even where the presence of Africans with disposable income was recognized, it was said those who could afford to travel preferred to keep “vertical allegiances with Europe rather than risk the potential hazards of visiting their neighboring African countries” (Poirier 2000: 34).

5.3 Changes favoring the development of regional tourism in Africa

This section examines what changes have occurred since the early 1990s to address the bottlenecks identified in the previous section. Nine changes are presented here clustered around the thematic areas of: information and communication technology (ICT), professional and personal networks, expanded financial services options, expanding transport options and networks, increase in accommodation types and options; increased knowledge of the regional market, improving attitudes towards regional travelers; and finally, the attention from national governments and multilateral donors attention that has benefited regional tourism.

5.3.1 Improvements in Information and Communication Technology

Advancements in communication technology have included an increase in communications options, as well as increased speed and access to communication tools. The two key advancements presented here are the internet and mobile telephony.

(a) Internet

The internet has revolutionized the way in which tourism marketing, promotion and booking are done at a global level (E-tourism Frontiers 2012).Within the African context, tourism destination promotion and marketing efforts have long been constrained. This was because government, in the light of its other more-pressing commitments, had seldom allocated sufficient funds to enable the concurrent promotion and marketing of tourism at the international and the regional level (Leshoai 2006). Traditional marketing involved the production of glossy high quality brochures (Kariuki 2006). Furthermore, international marketing and promotion is expensive due to the market segment to be targeted (the high-end market) and the need to pay for advertising in foreign currency (Leshoai 2006). On the other hand, a website is an easily accessible means for a national destination marketing organization to provide up-to-date destination information to prospective tourists.

This technology has significantly reduced the cost of advertising any destination, providing an effective product distribution channel. The internet, therefore, has made it easier for tourists to book and pay for holidays (Buhalis 2000; Sharma 2006; Alvarez et al. 2007; Maswera et al. 2008). Online tourism and travel innovations include travel consolidators such as Expedia.com, Travelocity.com and Orbitz.com which eliminate the need for travel agents by allowing prospective travel clients to package and pay for their own travel online.

Further, Expedia.com and WAYN.com have demonstrated the effectiveness of targeted online marketing promotion campaigns for Malta and Johannesburg, respectively. As explained by Lofuedo (2008), using Expedia.com to promote holidays in Malta produced faster and measurable growth than the traditional "spray and pray" marketing campaigns carried out by destination managing organizations unable to indicate which aspects of marketing campaigns are most effective (Lofuedo 2008). A further internet-related innovation has been the growing popularity of user-generated content (UGC), the internet equivalent of word-of-mouth advertising (Scarth 2008). Prospective tourists trust UGC more than they do official company-generated content (Scarth 2008), so blogs and social networks have proved significant in influencing and informing the travel of individuals and groups (Brown and Chalmers 2003; Lin and Huang 2006; Carson 2008).

(b) Mobile telephony

The single most important technological advancement in Africa since 2000 has been the mobile telephone. Prior to 2000 – before mobile telephones became affordable and available to the African mass market – the scarcity of fixed telephone lines on the continent was a serious hindrance to inter and intra-continent communication, resulting in delayed or missed business opportunities (Dieke 1998). Mobile telephony has been very rapidly adopted in Africa with the growth rate of mobile subscriptions being 147.8% between 2000 and 2008 (ITU 2009).

Mobile telephone technology now provides an additional tourism product distribution channel and marketing opportunity. Traditionally, marketing to tourists was possible only before or after their trip because it was difficult or disruptive to remain in contact with them during their holiday. The availability of roaming mobile telephone service has made in-trip marketing feasible (Touze 2008). Local tourism businesses which the tourist was likely unaware of prior to arriving at the holiday destination, are now in a position to reach the tourist through facilities such as the in-your-pocket guide which enables smartphone users to link directly to tourism information about their current destinations (Baker 2010; Buhalis and Jun 2011). The growing versatility of smartphones has opened up numerous opportunities and applications (apps) that are customized to the travel industry (Wagner et al. 2013).

5.3.2 Expanding Professional and Personal networks

Professional and personal networks have also benefited the development of regional tourism in Africa and may be summarized as the movement of labor or movement in pursuit of education/training. South Africa has played a key role in terms of both labor and education and this role has become more pronounced since 1990 when the country began to open up to the Southern African region and the greater African continent.

(a) Labor

South Africa has drawn mining labor from the neighboring countries of Malawi, Zambia, Zimbabwe, Mozambique, Namibia, Lesotho, and Swaziland since the early 1900s resulting in South Africans having family ties in the above-mentioned countries (Daniel et al. 2007). Furthermore, following the 1994 democratic elections, many South African companies expanded their operations into the African continent, investing in businesses ranging from small self-catering tourism accommodation to supermarkets, construction companies, and mining interests (Daniel et al. 2003; 2007). These investments have resulted in many professional Africans traveling to or from South Africa, for meetings or short training courses related to the South African companies they work for in their own countries (Daniel et al. 2007). These activities have contributed to the creation of VFR and business tourist traffic within the region.

Further factors contributing to growing intra-regional tourist traffic include the attraction of South Africa's well-developed infrastructure and position as an airline hub (Pirie 1990, 1992, 2006). This has motivated multinational corporations to move their African offices to Johannesburg or Cape Town, or schedule their annual board and shareholder meetings away from expensive European destinations to more affordable South African destinations (Nonyane 2008).

(b) Education

With respect to the pre-labor market – the student market – the internationalization of higher education has generated a further increase in southern African intra-regional tourist traffic. Since the 1990s, "…universities represent large, frequently underestimated generators of VFR tourism" (Bischoff and Koenig-Lewis 2006: 465) and South African tertiary education institutions have been able to attract a large number of students from the rest of the continent, and from overseas" (MacGregor 2007). Research into the characteristics of the regional students attending South African tertiary institutions indicates they are older and have more work experience than their local counterparts (Donaldson and Gatsinzi 2005). Furthermore, they play the dual role of being catalysts and consumers of regional tourism because they will, themselves, travel within South Africa and its neighboring countries. Most often the reason for these junkets is to visit other friends and relatives during their stay. In addition, their family and friends usually visit before or during graduation, spending between R5 000 and R12 000 a week while in South Africa (Donaldson and Gatsinzi 2005).

Linked to tertiary education, but expressed as the area of language learning, South Africa's English language travel sector has expanded considerably since 2000 (Correia 2011). This market is that of people who are learning English as a Foreign Language (EFL), who travel to an English-speaking country for immersion in the language. It has contributed to increased regional and international tourism from Lusophone and Francophone countries in Africa and other parts of the world, and some students stay on to enjoy tourism activities post-course (Correia 2011).

5.3.3 Expanding media influence

Multichoice Africa is a satellite pay-television service operating in South Africa – with phased expansion into the rest of the continent – since 1992 (Multichoice website 2009). This service has played a significant role (complimenting that of the internet, newspapers and magazines) in informing Africans about African business, leisure destinations and travel opportunities. Though criticized as "affordable to a small elite and to international hotels" (Pfanner 2007: 1), Multichoice's satellite television service currently serves about 1.5 million subscribers on the African continent (including clubs, restaurants and hotels).

Multichoice has begun to expand its base by offering budget satellite television packages in countries like Nigeria, Kenya and within South Africa itself (Caroline Creasy 2008). The company focuses on providing quality Africa-based content with several channels focusing mainly on African content. The company is also mindful of the fact there are three business languages operating in Africa: Portuguese, French and English, so it provides program options tailored to suit these language groups (Caroline Creasy 2008).

Other television media influences on African regional travel include the South Africa Broadcasting Corporation's (SABC) long-running syndicated travel show, *Going Nowhere Slowly*, which ran between 2002 and 2009 and featured two travelers driving to different parts of South Africa. The show initially focused on South African domestic travel destinations, but as it grew in popularity, it expanded to showcase neighboring countries and then countries further afield like Rwanda and Uganda (GNS website 2009). South African Tourism has featured promotional segments on South African television stations as well as on YouTube, aimed at encouraging domestic travel through the Sho't Left campaign. Young South Africans were the initial target market of the campaign (Rogerson and Lisa 2005) but it has been expanded to include youth from Mozambique and Botswana as a result of market research indicating these are growing and affluent markets (Appel 2008).

Print media has also reflected the growing interest in regional travel with magazines such as Getaway (into Africa), and Africa Geographic featuring drive or fly tourism packages to neighboring countries. Likewise, lifestyle magazines such as Top Billing in South Africa, and True Love in East and Southern Africa as well as other magazines target the same middle class audience. These publications showcase lifestyles of middle class and elite Africans and feature interesting tourist destinations within the continent. As a study by Deloitte (2013) notes, spending patterns of the emerging middle class in Africa are influenced by media, among other means.

5.3.4 Expanding financial sources and services

Expansion of the range and access to various foreign exchange and financial service options has been instrumental to improving the environment for regional tourism development in Africa. The foreign exchange crisis described in section 5.2 was resolved once African governments de-regulated currency control (Dieke 1998) and what followed was an expansion of the range of payment options available to both business travelers and tourists. Likewise, the increasing use of credit cards has meant they can be used to make online or direct travel purchases. "Plastic" has replaced traditional cash and travelers' cheques as ways to carry money while traveling (Susskind et al. 2003; Worthington et al. 2007). Research on credit card use in tourism has shown their use is mutually beneficial to banks and the tourism industry (Kaynak et al. 1994; Chen and Tseng 2005) and it has increased accessibility to travel as credit cards become more widely accepted by a variety of service providers in the tourism value chain (Weaver 2005).

Despite this availability of payment options for travelers, cash remains the most popular option for holidays and transactions. Africa's is an operational US dollar-based economy with many regional tourists carrying this currency when they travel regionally (Leshoai 2006). The South African Rand (ZAR) has also gained considerable popularity as an accepted currency in southern Africa. However, the exchange rate of the ZAR to local currencies often rapidly fluctuates, especially during holiday periods. This can be problematic for regional tourists when visiting popular holiday destinations in countries neighboring South Africa because they experience an increase in the availability of ZAR due to the influx of visiting

South African tourists patronizing these same resorts (personal communication).

Sources of capital for financing tourism development in Africa exists in three main forms: official development assistance (ODA), foreign direct investment (FDI), and private capital flows (Shelburne and Palacin 2007). International financial institutions (IFIs) provide official development assistance, channeling funds directly to governments and not individuals or companies. Regional development banks include the African Development Bank (ADB) and other regional development banking institutions such as the Development Bank of Southern Africa (DBSA) and the Industrial Development Corporation (IDC). These banks provide funding at the regional scale and DBSA as well as IDC have traditionally focused upon funding enterprises within South Africa's borders. However, since the mid 2000s, they have expanded their financing to the Southern Africa Development Community (SADC) and the rest of the continent (IDC 2008).

A third tier of financing focusing on private sector is foreign direct investment (FDI). This is defined as "a category of investment that reflects the objective of establishing a lasting interest by a resident enterprise in one economy (*direct investor*) in an enterprise (*direct investment enterprise*) that is resident in an economy other than that of the direct investor" (OECD 2008: 7). In other words, FDI inflows make it possible to fuel economic growth without needing to wait for a situation where domestic capital becomes available and without government needing to be the sole source of capital for economic growth (Werker 2006). The sources of FDI into African countries are both African and non-African. A source of FDI to the African continent, both African and non-African, is the African Diaspora, or more simply, remittances: the "cross-border earnings migrants send home" (Mutume 2005: 10). Throughout Africa, remittances have funded construction of personal as well as commercial properties (Ratha et al. 2007). They are credited with alleviating poverty at the individual scale because "a small portion [of money received] is invested, usually in property or a business" (Sanders and Maimbo 2003: 15). In 2012, remittances surpassed both FDI and ODA as the top source of external financing into Africa (Africa Economic Outlook 2013).

Within the tourism sector, the main FDI destinations are hotels and restaurants with investors being mainly Transnational Corporations (TNCs) from developed countries who enter into service agreements with owners of the hotel buildings (UNCTAD 2007). However, the experience with Middle Eastern investors like the Dubai group, which has invested in South Africa, Rwanda and Djibouti, has been that they invest directly into building hotel infrastructure (Gimbel 2008; Rivett-Carnac 2009). Furthermore, an attractiveness survey of the continent by the firm Ernst & Young (2013) highlighted the increase in intra-African FDI with Kenya, Nigeria and South Africa investing in other African countries. In 2012, South Africa emerged as the largest investor of FDI into the rest of the continent, with the top three destination countries being Nigeria, Ghana and Namibia (Ernst and Young 2013). This intra-African investment is considered "a critical trend, because it underlines a growing confidence and belief in the future of the continent by African themselves" (Ernst and Young 2013: 36). This consumer confidence is a catalyst for increased economic growth which in turn fuels the desire for tourism experiences.

5.3.5 The rising middle class

Sub-Saharan Africa's middle class was estimated at 34% (355 million) of that population in 2010, and projected to grow to 42% (1.1 billion) by 2060 (Juma 2011). The definition of middle class in Africa is not the same as that used in developed or emerging economies; for instance USD$20 in Benin is more valuable in the local context and can buy more than in New York (Deloitte 2013). The African middle class therefore, is considered to have an average annual income between $1,460 and $7,300 (Juma 2011; Deloitte 2013). Its growth has been driven by the decrease in income inequality, growing economies and tertiary education which translates to access to stable and well-remunerated jobs (AfDB 2011). The increase in a social class that has discretionary funds provides an opportunity for increased consumption goods and services (Deloitte 2013). The significance of this growing middle class to tourism is evident in the view that "Africa's emerging consumers are likely to assume the traditional role of the US and European middle classes as global consumers…" (AfDB 2011: 14). Furthermore, approximately 60% of Africa's population is under the age of 25, presenting prospects for a growing tourism source market from within the continent itself.

5.3.6 Expanding Accommodation availability

The supply of tourism accommodation across Africa has grown as a direct result of the growing African economies and associated business travel. Besides business travel, the growing middle class and its increased discretionary spend has proved a catalyst for increased second-home ownership and its dual role as tourism accommodation and income stream (Hoogendoorn 2011). The type of hotel accommodation available throughout most of Africa is the two to three star category (Ernst & Young 2010), with the accommodation sector dominated by smaller establishments such as boarding houses, guesthouses, bed and breakfasts, and lodges (Ernst & Young 2010). Larger international hotels are typically only found in the major cities and tourist destination areas (TBCSA 2013; Ernst & Young 2010).

With respect to full-service hotels in the 3 to 5 star range, there are five hotel groups headquartered in southern Africa that have expanded into the rest of Africa since 1994. These hotel groups include: Protea Hotels, Southern Sun, Sun International, Cresta Hospitality, and African Sun Limited. Along with others, these five hotel groups have expanded their influence using loyalty programs and providing different standards of accommodation (Aritho 2004). New developments are recommended in the three to four stars category aimed at attracting the international market and younger African travelers (Ernst & Young 2010).

Other hotel chains originating from outside the continent with a presence on the continent include the Accor Group, the Pestana hotel group, the Kempinsky chain, Serena Hotels and Rani Group. The recent involvement of Indian conglomerate, Tata group, in Africa's accommodation sector – through investment in the Taj Pamodzi Hotel in Zambia, and in Johannesburg, South Africa – establishes it as a major contender. In addition to the large hotel chains there are numerous small, exclusive leisure brands such as Wilderness Safaris and '& Beyond' (&B). They operate tented and safari accommodation and cater to the high-end tourist segment (Spenceley 2010).

The increase in hotel accommodation and rooms available in Africa has had a positive impact on host communities by creating jobs (Fortanier and van Wijk 2010). However, where foreign companies are managing the hotels, knowledge transfer has been reversed. The foreign hotels have attracted the best employees from local firms, leaving local firms as training ground for inexperienced labor (Fortanier and van Wijk 2010). Within South Africa, the focus on hotel investment has been primarily in the large metropolitan cities and large towns, in the three, four and five-star categories (Rogerson 2013a). Smaller towns have been dominated by the development of guest houses and bed and breakfast accommodation (Rogerson 2012). The quality and standards of hotels and other accommodation have improved since 1990 and cater to an array of stays (Rogerson 2011b) and markets (Rogerson 2013a).

Timeshare resorts though, are neither hotels nor second homes. They are a sub-category of tourism accommodation available predominantly in coastal areas (Pandy and Rogerson 2013). International companies like RCI international resorts as well as home-grown timeshare companies dominate the time-share offering in South Africa. Timeshare opportunities are also available in Zimbabwe, Reunion, Mauritius, Namibia and Swaziland (RCI website 2009). Recent research undertaken by Pandy and Rogerson (2013) determined that within southern Africa, South Africa stands out as the only market reliant on domestic (80%), rather than international tourists, which is contrary to the case in other African countries.

5.3.7 Improving transport networks and infrastructure

This section presents the changes occurring in African transport since the 1980s. It starts by outlining the changes in land transport, followed by changes in air transport.

(a) Rail transport

Railway transport in Sub-Saharan Africa (SSA) declined significantly in the 1970s and 1980s, primarily as a result of decaying railway infrastructure or destruction of railway lines and stations in countries where there was political instability (Teye 1988; Abrahamsson and Nilsen 1995). Furthermore, the existence of three different rail gauges within the African rail networks: 1.0 m in southern Africa, 1.067m in east Africa, and 1.435m in parts of Central, West and

North Africa, has made a trans-continental railway system difficult to realize (Frost and Shanka 2001; UNECA 2006; UNECA 2007). This is in sharp contrast to Asia where rail transport has supported the growth of domestic and regional tourism (Singh 2004; Vu and Turner 2006). Poor connectivity of African railway transport means rail systems are not yet sufficiently matched to significantly contribute to regional tourism development. However, there are efforts within Southern Africa to link different Spatial Development Initiatives' road and railway transport to provide transport alternatives (Thomas 2009).

In South Africa, Mozambique and Zambia, the efforts to upgrade railway systems are primarily focused on decongesting the flow of freight and facilitating the extraction of minerals. In South Africa, however, the Gautrain, a passenger rail and bus service has been a boon to not only tourism, connecting the O.R. Tambo International Airport to Sandton and Pretoria, but also local commuters (SA Prop News 2013). With plans to extend the Gautrain routes to suburbs in the greater Johannesburg and Pretoria areas, the potential for spreading impacts of tourism further from the central urban areas of Gauteng increases (SA Prop News 2013). Within Mozambique, the increase in mineral resource extraction, with capacity to serve passengers and freight, has necessitated the rehabilitation and extention of the railway line between Tete and Nacala port (Eisler 2013) and building of a new railway between Tete and Macuse, Zambezia (Flak 2013). In Zambia, road transport networks have flourished in the absence of a reliable railway system. However, government has indicated its readiness to invest in improving railway transport that facilitates the export of copper through South Africa (KPMG 2013;

Xinhua 2013).

(b) Road Transport

In 1991 the situation in southern Africa was one where “roads linking tourist destinations [we]re in very poor state…forcing [tourists] to fly, where surface transport would have been preferable, increas[ing] the costs to tourists… reduce[ing] the number of tourists, as well as making destinations unattractive” (SADCC 1991: 4). Despite these challenges to road transport, the situation has improved significantly since 1991 with 90 per cent of passenger and freight transport within Sub-Saharan Africa (SSA) being carried by road (SSATP 2007).

Regional integration efforts have improved the development of road routes and networks throughout the continent (Kessides 2012). This is particularly true in southern Africa where development corridors (DCs) and spatial development initiatives (SDIs) were developed to boost both tourism and trade activities. Development Corridors were employed as a method to open up underdeveloped areas with economic growth potential constrained by a lack of infrastructure (Jourdan 1998; Koch and Massyn 2001). Both the public and the private sector contributed to the upgraded of infrastructure in order to encourage investment in-flows (Thomas 2009). This strategy proved fruitful as is evident from the increased volumes of traffic and commercial activity generated by the Maputo, Beira and Nacala corridors (Rogerson 2001; Crush and Rogerson 2001). Improving road quality and networks catalyze regional tourism by easing both the cost and comfort of road travel (Prideaux et al. 2001).

Public transport has been developed to cover a range of markets between luxury and basic passenger transport, which has facilitated the growth of cross-border visitor traffic in Southern Africa (SAT 2008). Commercial bus services in Southern Africa have first grown by serving domestic demand and once successful, have expanded to serve key regional destinations (Kroet 2004). Three South Africa-based bus companies, Translux/City to City, Greyhound and Intercape, offer regular service to the capital cities of bordering countries and provide prospective clients the opportunity to book and purchase tickets online. The Cross-Border Road Transport Agency in South Africa issued 2,367 permits for buses to operate between South Africa and eight SADC countries in 2012 (CBRT website 2012). They issued 11,950 permits for mini bus taxis over the same period, with the top three countries to which permits were issued being Mozambique, Lesotho and Zimbabwe.

Cross-border travel, whether self-drive or using public transport, has been encouraged by the expansion of standardized petroleum service stations across the region. At least five international petroleum service station companies: BP, Shell, Engen, Caltex, Total have a presence in East and Southern African countries. These companies offer standardized services such as: small shops that stock basic necessities for long-distance travel and snacks, clean toilet facilities, public telephones, basic vehicle fluid top-up, security for those making a rest stop and station attendants provide accurate directions to drivers who are lost.

(c) Border crossing hours

Despite improved conditions for regional self-drive tourism listed above, one crucial factor continues to be a bottleneck. Border posts in most Southern African countries are open for 12 hours a day or less, usually 6:00 a.m. to 6:00 p.m. This means any vehicle reaching a border post after 6:00 p.m. has a 12-hour wait until the border post opens in the morning. Some busy border posts have extended working hours to close either at 7:00 p.m. or at the very latest, 10:00 p.m. Beyond these extended hours, during periods of peak road travel – usually the Easter and Christmas holidays – popular borders such as Beitbridge (Zimbabwe – South Africa) and Koomatipoort/Resano Garcia (Mozambique – South Africa) operate for 24 hours a day to accommodate the increase in the volume of traffic.

(d) Air transport

Developments in transport systems theory and practice have promoted the hub-and-spoke system as a model to improve freight/passenger service networks and travel time southern Africa (O'Kelly 1998; Pedersen 2001; O'Connor 2003). As a result of the adoption of this system, most SADC countries may be accessed through the airport hub at Johannesburg's O.R. Tambo International Airport. Western Africa is underserved by hub airports, while Johannesburg, Nairobi and Cairo are important in the southern, eastern and northern parts of Africa respectively (Otiso et al. 2011). The role played by Johannesburg as an African regional flight hub is evident in the high volume of passengers passing through it, with most being African (intra-regional) passengers whereas in other airports the majority of passengers are non-African (Otiso et al. 2011).

Since the early 2000s, the existence and growth in number and routes of low-cost carriers (LCCs) – the no-frills airlines – within East and Southern Africa has made air travel accessible to a broader market; people previously excluded by the high cost of scheduled flights (Fourie and Lubbe 2006). Growth of LCC presence has also increased regional airlift, providing prospective tourists with more options for travel to regional tourism destinations. LCCs get more people to travel by air through attracting new clients who are, "interested in the ease and affordability of air travel so they can make those trips that they previously could not afford, for example, flying home during university vacations or perhaps visiting a relative" (Ford 2003: 1). A further benefit of LCCs is they have created competition with the larger scheduled airlines, resulting in an overall relative reduction of airfares, which has benefited the consumer.

5.3.8 National government attention to tourism

Since the early 1990s, a popular recommendation given to African governments regarding tourism development was that they should create standalone ministries of tourism in order to change the perception of tourism from a social or recreational activity, to tourism as an economic catalyst (Gerosa 2003). Today the number of fully-fledged ministries of tourism within the SADC community is three (South Africa, Mozambique and Angola). Ten countries have linked their tourism and natural resources ministries, while two countries (Swaziland, Mauritius) have linked tourism to communication. It is considered a key advancement to accord tourism a standalone ministry because it means the sector will receive primary attention and a budget.

5.3.9 International donors

Both multilateral and bilateral lenders are involved in tourism development, though to different extents. In 2010, the United States Agency for International Development (USAID) was involved in tourism projects in Rwanda, Mozambique, Tanzania and Kenya (Spenceley 2010). The German Development Service (GIZ) is involved mainly in bilateral support of tourism development, as was the Netherlands Aid Agency (SNV) (Spenceley 2010; Vignati 2011). The British Department for International Development (DfID), along with the Swedish International Development Agency (SIDA) supported research that resulted in the World Bank's return to funding tourism projects (World Bank 2011). The World Bank closed its Tourism Projects Department in 1979 in order to focus on more pressing development projects (Hawkins and Mann 2007). Since 2009, however, the Africa Region's Finance and Private Sector Development Department (AFTFP) has focused on directly supporting tourism development in Africa. This is directly as a result of the changing environment for tourism development due to emerging opportunities on the continent. As explained in the Bank's tourism development strategy, the opportunities for growth and the emerging middle class all indicate that "under the right conditions, the tourism sector can take advantage of these opportunities and thrive” (World Bank 2010: 1).

5.4 Conclusion

This chapter has argued that the broader African economic, political and cultural environments, particularly in southern Africa, have changed substantially since the current African tourism development framework was put in place in the 1980s. These changes have transformed regional tourism to be viable where it once was not. Recognition of the changing environment for regional tourism development in Africa is paramount in allowing countries to position themselves to harness the ongoing *ad hoc* expansion of the regional tourism market. Only with this kind of acknowledgment can development gaps left by international tourism be adequately addressed.

CHAPTER SIX: DEVELOPMENT OF REGIONAL TOURISM IN BOTSWANA

6.1 Introduction

The objective of this chapter is to examine the extent to which the regional tourism market has been recognized by both the public and private sectors in Botswana's tourism development efforts. The chapter is laid out in two sections. The first section provides the background of tourism development in Botswana and situates the country in the analytical framework of core-periphery countries and tourism development. Section Two presents the findings of the empirical research that was undertaken.

6.2 Background of tourism development in Botswana

The modern state of Botswana (Figure 6.1) began its colonial history as the British Protectorate of Bechuanaland in 1886. The country formed one of three British High Commission territories also known as the BLS countries (Botswana, Lesotho, and Swaziland) (Minter 1988). During Bechuanaland's 80 years as a British protectorate, the assumption had been it would eventually be incorporated into South Africa and become a Homeland. With this in mind, there were no restrictions placed on movement or employment of Batswana within South Africa, Lesotho, and Swaziland (Minter 1988). This freedom of movement and employment continued until 1965 when Botswana became a self-governing and independent country in 1966. As a result of this freedom of movement, Batswana citizens and South Africans settled or married across the borders of the four countries. This point is germane to any discussion of southern African tourism because this ease of cross-border movement sowed the seeds of present-day cross-border travel where the purpose of a large number of intra-regional tourists in the region is to visit friends and relatives (VFR) (UNDP et al. 2007a).

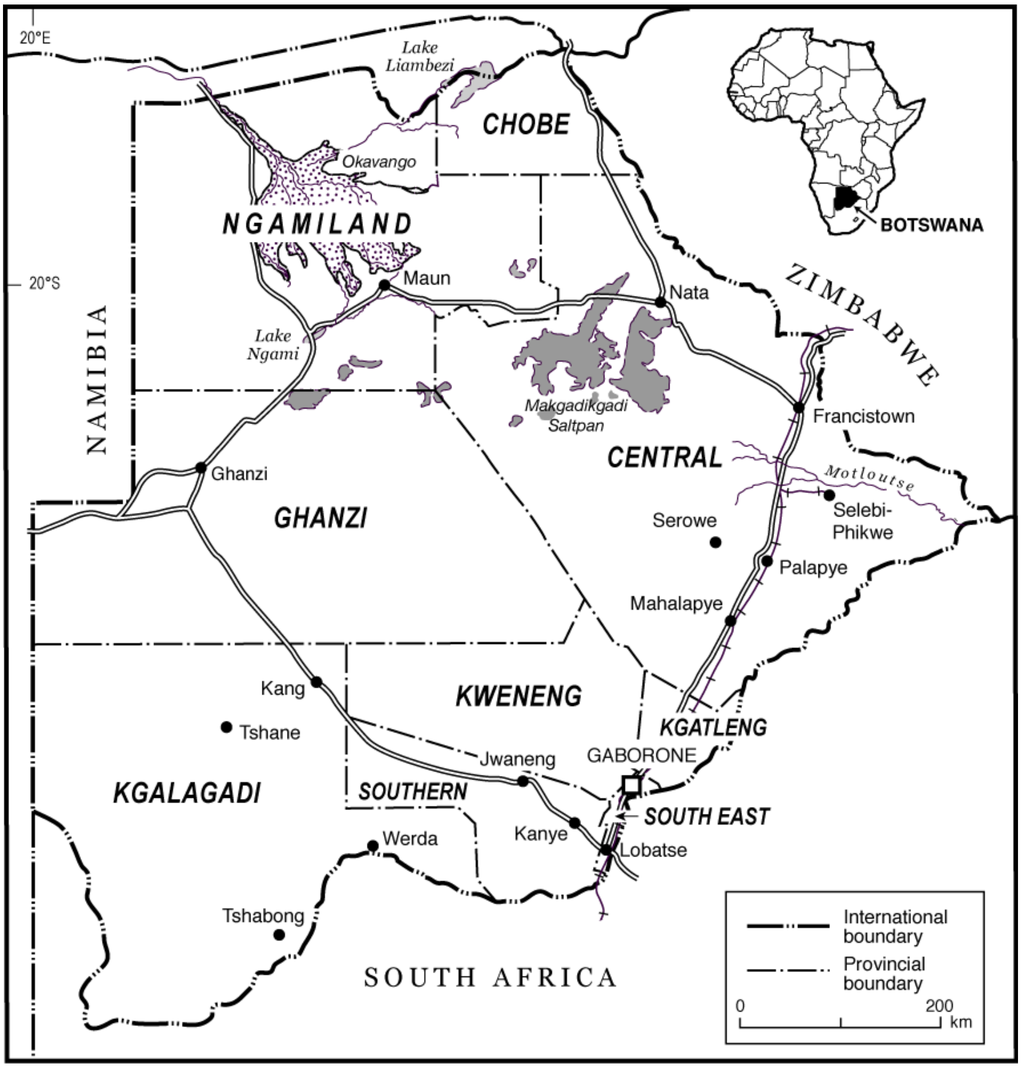

Figure 6.1: Map of Botswana.

6.2.1 Tourism development and attendant expectations

The discovery of diamonds immediately following independence in 1967 provided a source of wealth to support social and economic development in the new nation. It also served to place Botswana on a different development trajectory than that of Lesotho and Swaziland (Harrison 1995). The latter countries began to actively develop tourism - primarily casino tourism - immediately following independence due to their limited mineral and agricultural resources (Crush and Wellings 1983; Harrison 1995). For Botswana, the pursuit of tourism development was more leisurely and exclusive (than Swaziland and Lesotho) because there was no pressing need to generate foreign exchange from it. Massyn and Koch (2004) trace the start of tourism and the lodge industry in Botswana to the late 1950s, when expeditions of East Africa-based hunting safari companies ventured into the Okavango, which was known for its wildlife but no tourism infrastructure.

At independence in 1966, tourism made a negligible contribution to GDP because the industry was "almost nonexistent" (Mbaiwa 2003: 451). Botswana was traditionally seen, not as an independent or anchor destination, but rather as forming part of the southern African circuit, and was described as a "fascinating backwater that can be visited quickly and economically from a Johannesburg base" (Hawthorne 1970). International tourism arrivals increased in the 1970s and unlike Lesotho and Swaziland which depended primarily on the South African market, Botswana was able to access a more international tourist market (Crush and Wellings 1983; Harrison 1995). This was despite the inbound self-drive South

African market remaining the most significant market in terms of total tourist numbers, but not in terms of revenue value (Almagor 1985).

The slowing of economic growth started in the late 1980s, prompting government to re-examine its development planning, and to seek directions in which to diversify the economy. A resource widely available in the country is wildlife and wilderness, the third-most valuable natural resource after minerals and rangelands (NDP 9 2002). 39% of the country's area has been set aside for conservation through the establishment of game reserves, national parks and wildlife management areas (Republic of Botswana 2000). These natural resources occur in close proximity to poor, rural communities, and government's view that the country has the comparative advantage to compete regionally and internationally (Republic of Botswana 1990), has resulted in tourism being flagged as an area of great potential to the economy; thus several steps have been taken to support the exploitation of this potential. The government expectation in encouraging and supporting the development of tourism is "to obtain, on a sustainable basis, the greatest possible net social and economic benefits for Batswana from their tourism resources, scenic beauty, wildlife and unique ecological, geographical and cultural characteristics" (Republic of Botswana 2000: 2). Tourism is expected to give Batswana, particularly rural Batswana, an income through the sub-leasing of community land and community controlled hunting areas (CHAs) or through employment or small enterprises which would reduce rural-urban migration (Republic of Botswana 2000), among other ways. This study examines whether one of the “other ways” – exploiting the benefit of large numbers of inbound regional tourists – has been recognized.

Botswana started to develop its tourism industry in earnest in the late 1980s and early 1990s. The prevailing theme in global tourism thinking at the time was ecotourism and environmental conservation so as not to ‘kill the goose that lays the golden egg’ (Mbaiwa et al. 2002). This concern contributed to the promotion of Low Volume/High Value tourism (LVHV). To conserve the fragile environment, government chose to “shift the mix of tourists away from those who are casual campers towards those who occupy permanent accommodation” (Republic of Botswana 1990: 3). This was accomplished through imposing higher entry fees (Zeppel 2007) and capping accommodation in lodges at 24 beds with the intention of discouraging mass tourism (Kalikawe 2001). Furthermore, the roads in tourist areas were left unpaved and rough so that only 4x4 vehicles could access them (Kalikawe 2001), thus also ensuring lower volumes of visitors.

6.2.2 Tourism product and geographic spread

Botswana’s principal tourist product is wildlife and wilderness, consumed as hunting or photographic safaris, boating, camping, walking trails, dug-out canoe (*mekoro*) safaris and game viewing (Stevens and Jansen 2002; Mbaiwa 2003; 2005b). It is estimated that 90% of holiday tourists visiting Botswana come primarily for a wildlife-based vacation (Republic of Botswana, 2000). Botswana’s tourism is geographically uneven, with leisure tourism concentrated in the northern and north-western parts of the country (i.e. the Okavango Delta and Chobe River in close proximity to Victoria Falls). Maun is the gateway to the Okavango (Mbaiwa 2005a), whilst Chobe National Park, followed by Moremi Game Reserve, receive the highest number of visitors (Mbaiwa 2005b). Other national parks are not as popular or well known. Though cultural, archaeological and historical attractions exist, they currently do not play a major role as tourist attractions due to difficult access and little infrastructural and marketing support (Tefa 2004). Both the tourism industry and the general economy experience a significant amount of leakage of revenue due to importation of basic products ranging from paper to food, mainly from neighboring South Africa (Stevens and Jansen 2002).

6.3 Research Findings

6.3.1 Botswana inbound tourism arrivals

This section presents the inbound tourism data for Botswana which documents the growth of inbound tourist volumes between 1994 and 2010. The data presented are from three different sources: (i) the Central Statistics Office (CSO) traditionally collected and published tourism data in Botswana before the establishment of the Ministry of Environment, Wildlife and Tourism (MEWT in 2002); (ii) the World Travel and Tourism Council (WTTC) Tourism Satellite Account report on Botswana (WTTC 2007) and, (iii) the United Nations World Tourism Organization's data on inbound tourists to Botswana. The data from each source differ to varying extent. However, despite this difference, the general trend in the growth of inbound tourist volumes is evident.

The number of inbound tourists has increased since 1994 (Figure 6.2). This growth trend was interrupted by periods of no growth specifically in 1995-96, 2005-2006 and 2008-2010 which mirror global economic downturns. When the total number of inbound tourists is disaggregated to reflect the five UNWTO regions, Africa is the largest source region followed by Europe, the Americas, and Asia and the Pacific. When data from the African region are further disaggregated to show the tourists' country of residence, the top four African countries in order of volume are: South Africa, Zimbabwe, Namibia and Zambia.

From the data available, South Africa has contributed the highest number of visitors to Botswana since 1994, with Zimbabwe overtaking it briefly in 2003. This increase in Zimbabwean visitors was due to the economic sanctions imposed on that country starting in 1999 which caused its citizens to travel to neighboring countries either for shopping or to seek livelihoods (Tema 2004). The study conducted by the WTTC in 2007 provided a comprehensive overview of tourism statistics at that point in time and indicated that over 80% of inbound visitors to Botswana are from other African countries. Furthermore, 90% of all visitors to Botswana entered the country by road, serving to underscore the peripheral or excursion nature of the destination.

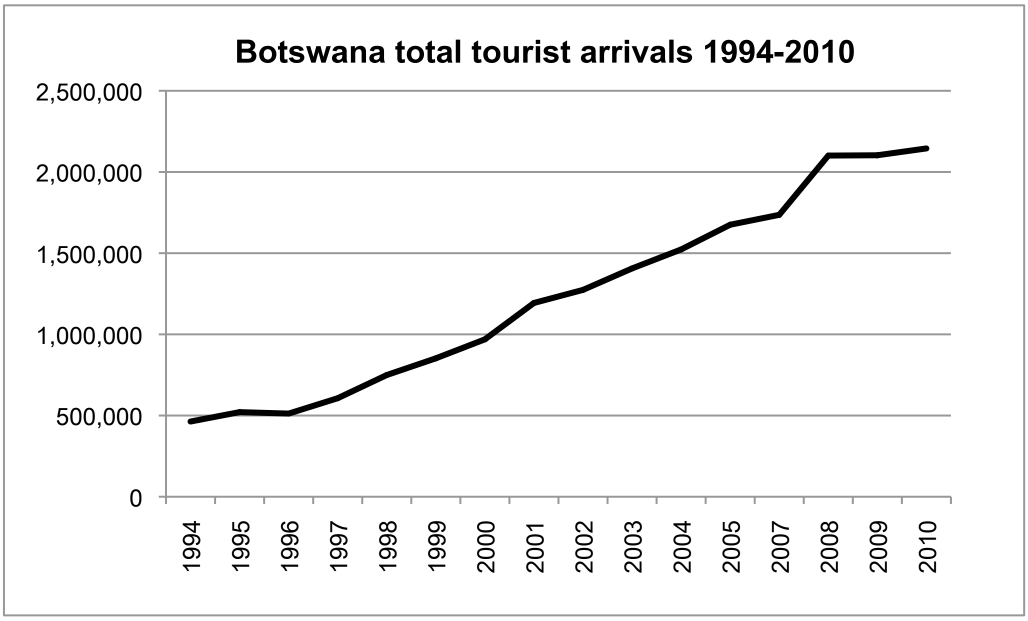

Figure 6.2. Inbound tourist arrivals for Botswana 1994 to 2010.

In terms of seasonality, visitor volume peaks at Christmas/New Year, and in the boreal late summer months of August-September; whilst low volumes are recorded during February, May, June and November. Visitors spent most money on accommodation, shopping, food and drink, and recreation. The geographic spread of visitors showed that only about 14% visited the primary tourist areas of the north (Maun and Kasane), while up to 75% visited either Gaborone or Francistown.

6.3.2 Recognition of regional tourism in Botswana's public and private sector

This section examines the public sector pronouncements on and view of regional tourism; it examines the key tourism planning documents that have recognized the regional market, and whether that recognition has been positive or negative. The main documents presented here are Vision 2016 and the Tourism Master Plan (TMP).

Public sector documents such as Botswana's Vision 2016, recognized the important role tourism development has to play in the country's development, and notes that the LVHV policy should be reviewed in view of "… evidence from neighboring countries [that] suggests there is scope for increasing the volume of tourism without catastrophic environmental cost" (Presidential Task Group 1997: 44). The TMP (Republic of Botswana 2000) recommended that government expand designated tourism areas beyond the northern part of the country in order to satisfy tourism demand. A 'modified high volume/mixed price' tourism development path was judged to be useful, where wildlife and wilderness would remain the primary product but would be complemented by the development of cultural, heritage and urban tourism. It also noted, significantly, that inbound growth in tourists was not from the LVHV segment targeted in the tourism policy, but from the self-drive, overland youth and VFR markets (Leechor and Fabricius 2006).

Botswana Tourism, the destination management organization, recognizes South Africa as a core source market, especially for self-drive tourists. Transit visitors are also recognized as a market with potential for growth (Mbaakanyi 2009). The mechanism used to engage these tourists is primarily through travel agencies, their websites (which has contact information for graded tourism establishments), through newspapers and magazines, and using specific media to target different segments. As a result of the economic downturn and the budget cuts experienced by Botswana Tourism, they have had to prioritize on where the money should go and to maximize on extracting value from what is already in place. They have therefore continued to focus primarily on the international market and continued to reach the regional market through travel exhibitions in Cape Town and Durban, and through television, MNET, where promotions run in time for interested parties to book seasonal holiday travel dates (Mbaakanyi 2009).

6.3.3 Ownership and investment in Botswana's tourism industry

Ownership of tourism enterprises in Botswana has been dominated by non-citizens since the inception of the industry, with little government intervention. After 1990, when the tourism policy was published, government's involvement grew, particularly with regard to regulation and policy framework, as well as improving tourism infrastructure (roads, electricity, park accommodation standards), and incorporating local communities living next to tourist resources (via community and ecotourism, park concessions, etc.). Government also made available funding and training opportunities to Batswana, after committing to tourism as a means to help Batswana improve their livelihoods. Part of the economic diversification strategy has been to encourage investment in tourism by the private sector through the introduction of an attractive legislative framework where "50% of training costs for citizen employees is refunded by government; Profits, dividends and capital can be readily repatriated and there is no foreign exchange control " (BW Focus 2003: 24). Government regulation efforts in 2006 culminated in the restriction to citizens only of the following tourism activity licenses: guest houses, motor boat safaris, camping and caravan sites, mekgoro, mobile safaris and tourism transfers and transportation.

Government efforts to increase citizen entrepreneur participation in the national economy and to attract investors who would increase economic productivity was done through the introduction of the Financial Assistance Policy (FAP) in the 1990s and the loans made available through the Citizen Entrepreneurial Development Agency (CEDA) program since 2000. These efforts have been frustrated by investors who established companies and enterprises to take advantage of the "free" money that was available from government (Malebogho 2004). Examples of misuse of these funds include setting up enterprises that closed shop once the tax-break period of five years expired (Moghae 2005). Though some investors are opportunists, local investors being risk averse, prefer to enter sectors that are familiar (Montsi 2004). There are, however, local entrepreneurs who have taken advantage of the financing facilities offered by government to involve themselves in tours and lodges.

There was indeed a presumption expressed by one of the interviewees that once there are more citizens participating as owners in the tourism industry, there will be more products for the domestic and regional market (Ngwenya 2004). This is because they will better understand what is preferable for this market and will be able to grow organically into the tourism industry. An example of a local investor who has grown organically is Seabelo Express, who started out as a passenger transport company moving passengers between towns in Botswana (Onyana 2004) and has now expanded to have a tours and travel section. This is elaborated upon by Onyana, who was working at the Intercape Gaberone office,

> *Intercape started [operating in Gaborone] about '99/'00. 90% of our travelers connect to other parts of South Africa. We did not really have competition because minibuses were the only other transport to South Africa. They really were not competition because they are not as comfortable as the bus and they leave only when they are full so you cannot say when you will depart…But along came Seabelo's Express. It is the largest transport service provider in the country. It has a loyal customer base especially the students. It offers a free meal on board, takes the shortest route to Joberg, doesn't stop anywhere like Intercape. In fact it gets there an hour before Intercape and it works with the Greyhound company so that travelers can catch the connection to the next South African destination (Onyana 2004)*

Another interviewee indicated that these Seabelo's Express buses connect southern and northern Botswana, where other buses and minibuses wait to transport people to Zimbabwe, Zambia and even Tanzania (Ariyaratnam 2004).

Individual Batswana (as well as foreigners) have responded to the high demand for accommodation in towns by converting their (own or rental) homes into guesthouses (Mughogho 2004). A large number of these guesthouses are, however, considered illegal because they are not registered with the Department of Tourism and the rules state they can only get registered if located in areas zoned for tourism operations (Sianga 2004). Hotel and Tourism Association of Botswana (HATAB), the influential private sector umbrella for the tourism industry, is aware of this problem and has only one guesthouse that is registered as a member. Botswana's tourism industry was characterized as "owner-operator" by Mwendwa (2004),

> *The owner of the lodge/guesthouse is also the owner of the [wildlife] ranch and is also the tour operator. There is no job for the local ground operator who is the marketing tool for the country. .. it is different when compared to a country like Kenyan or Morocco where the local operator sells different hotels and the country. Even at ITB, southern Africans focus on selling their properties and not the country ….Almost all tourism operators in Botswana are based in South Africa, there are no ground operators, all the tour operators/travel agents here are branch offices of SA companies (Mwendwa 2004).*

6.3.4 Development of domestic and regional tourism

The prevailing theory of how regional tourism develops is that once a country is able to support domestic tourism, this market will then expand out into the region- the distance-decay effect (Oppermann 1997). This is not, however, the case in

Botswana. The exclusive LVHV focus of the tourism industry renders the existing tourism product too expensive or too dull for a domestic market that has disposable income to spend on recreation. Therefore, Batswana go on holiday to Zimbabwe, Zambia, Cape Town and Johannesburg, which are most affordable (Montsi 2004). More recently, the trend has been to travel further afield to key continental or international destinations such as Maputo, Zanzibar, Egypt or New York, organized through local travel agents (Wierenga 2009). In fact, as one interviewee stated, "*Batswana have money and they are willing to spend it in South Africa*" (Onyana 2004).

This inversion of the distance-decay effect is actually endorsed by Botswana Tourism, which is mandated to sell Botswana as a destination to both domestic and international markets. This is a challenging mandate, considering they face tough competition from South Africa, which has identified young Batswana as an attractive regional market and therefore sells tourist products targeted specifically to them. As the Botswana Tourism marketing executive explained, they have prioritized their markets, and the first priority is the international market which is already understood. She felt that perhaps,

> *"Instead of competing with South Africa to win back our domestic tourists, it may be a better strategy to let Batswana first visit our better marketed, more diverse and more attractive neighbor. They will learn to be tourists*

> *and will become curious with time and desire to see what their own country offers" (Mbaakanyi 2009).*

This is certainly a pragmatic approach and could serve as an indication that the tourism product on offer in Botswana is aimed at a more well-traveled (and affluent) market and is not attractive to the prevailing tastes of the domestic market which seeks an experience beyond wilderness and wildlife. In addition, most Batswana have a rural home and so are familiar with "the bush" and would prefer to move towards more developed spaces or destinations (Montsi 2004). Within the urban spaces, recreational activities oriented towards the urban dwellers have been developed. These include shopping malls and movie theatres, beer and food gardens, pubs and restaurants, cultural villages, and a nature reserve within a day trip's from the capital (Wierenga 2009).

6.3.5 Pricing itself out of reach

Many of those interviewed (Mwendwa 2004; Mughogho2004; Tafa 2004; Wierenga 2009) said that Botswana is effectively pricing itself out of the domestic and regional tourist markets. They made a point of comparing the price of accommodation in Botswana and South Africa and concluded that the latter has much better infrastructure and is therefore more attractive to Batswana going on holiday.

Botswana is a very expensive destination for most Africans, for example, contrast the following prices: in Botswana a guesthouse, shared bathroom and living room and kitchen, is P150 per night; in Johannesburg, you can get a room in Hillbrow for R60, or a nice room at Protea Hotel for R150 (P105). You get much more value for your money in South Africa (Mughogho 2004).

Furthermore, South Africa is popular as an education and shopping destination, as was mentioned when an interviewee talked about the type of people who use the services of Intercape between Gaborone and Johannesburg,

Usually students who study in South Africa their age is about 18 to 25. They travel during the school breaks. We also get middle-class white South Africans who come to visit friends; or business people who go back and forth quite often. Tuesday and Wednesday are quiet days for travel, and volume starts to pick up on Thursday. No bookings are made without passports because some people do not get visas. They just jump in the bus, and if there are problems at the border, the company has to pay big fines. The highest volume is usually at month end, weekends, and every 3 months when students are coming home from school. December, January and February are when the students are many. June and July is the school breaks. In December we get many people traveling both ways… Every month end people leave Gaborone to shop in South Africa (Onyana 2004).

Despite these challenges of cost in the development of domestic and regional tourism, Botswana Tourism leverages the use of media and co-sponsoring strategic events taking place in the country such as the 2006 Nokia Face of Africa model boot camp to promote the country's name and image, regionally and internationally. Their target market is the fly-in regional tourist who has access to the media they use, such as the National Geographic documentary '*Roar: Lions of the Kalahari*', and the '*No. 1 Lady's detective agency*' series. Both these films were first marketed to an overseas audience and then to an African audience via Multichoice, featured on the National Geographic and MNet channels respectively. To draw the interest of audiences within Botswana, a competition to win a holiday in the Okavango ran in tandem with the broadcast of the '*No. 1 Lady's detective agency*' on MNet (Mbaakanyi 2009).

The case for diversifying the tourism product beyond wilderness and wildlife has been repeatedly made by global recessions that affect the inbound international tourists. In 2008-2009, Botswana experienced a decline in both tourist arrivals and receipts due to the global credit crunch. The recession provoked statements in support of regional tourism, with the CEO of the Botswana Tourism Board quoted as saying that the regional tourism "market is less fickle compared to the overseas market" (Mosinyi 2009b). Botswana Tourism believed the targeting of the regional market – South Africa in particular - would help tourism survive the downswing, and focused on both traditional marketing channels (travel agents and media) and direct marketing to clients through strategic appearance in broadcast media (Mbaakanyi 2009).

From the inbound tourist statistics it is evident that South Africa is Botswana's most significant inbound market in terms of volume. When asked about the South African tourists, one interviewee indicated that,

> *In Botswana, South Africans are the primary business [clients] but also the problem. They are a problem in the North where they are pirate tourism operators, they take on 3-4 clients (mostly South Africans or Namibians) who are usually referred by friends or find them via the internet.*

Though some South Africans are seen as pirate operators, they are recognized as a significant market, particularly the 4x4 or self-drive market, with informants noting that they "flood" the game parks especially during school holidays (Mughogho 2004; Sianga 2004). These volumes are sensitive to the exchange rate between the Pula and Rand, so that when the Rand is stronger, they increase in numbers (Mughogho 2004). Self-drive tourists continue to be seen as "overcrowd[ing] parks and do not observe conservation ethics", generating the suggestion that the fees and access to parks be altered in a way that extracts more value and channels the income to CBOs (Republic of Botswana 2008b). This is not an entirely new idea or call because it corresponds with earlier indications by Almagor (1985) that tourists visiting protected areas in the north should be required to hire local tour guides.

Despite this large number of regional leisure (self-drive) tourists, the income from them is low (Ngwenya 2004). This is because the self-drive tourists bring with them, from South Africa, almost all the perishable and non-perishable items they will consume during their holiday, a sore point with the host country because they feel these tourists should support local economies by buying from them. However, the self-drive tourists feel they can get supplies cheaper "*at Spar in Joburg, than at Spar in Kisane*" (Wierenga 2009). What this means is the self-drive tourist feels justified in carting in all needed products because many retail outlets in Botswana (who themselves import everything from South Africa) do not have a wide variety of products, and wherever they are found, they are at least twice as expensive as they would be in South Africa or Namibia, making it much cheaper to carry in stock rather than purchase at the destination.

6.3.6 Variations on the typical core-periphery theme

One thing that emerged from the study of Botswana and is not evident in discussions on core-periphery and non-Western tourism is the large volume of Batswana who leave their country as leisure tourists and travel to neighboring countries with better established tourism products. What is of further interest is that it is encouraged. There is also the regional market which is non-discretionary (traveling to the country for business or transit purposes) and which makes use of guesthouses outside the mainstream tourism circuit. They are high in volume and need to be entertained and their entertainment takes the form of visiting malls or cultural/heritage centers located near urban hubs. The northern (or wilderness and wildlife) tourism product is both out of range of their budgets, and many of them have access to the same (wilderness and wildlife) product at a subsidized rate in their own countries (Mwendwa 2004).

The geographical proximity of Botswana to South Africa (or in this case of the periphery to the core) makes it easy to compare prices of holiday products and enables one to gravitate towards where there is value for money. This proximity enables the core, South Africa, to (in that characteristic manner of cores) take whatever extra income would have been available to Botswana in the form of domestic (or regional) tourism into its own economy. This is compounded by the fact that many Batswana are pulled to South Africa for shopping for everyday essentials. This points to Botswana's type of marginality as contingent marginality, where it is unable to compete with the core, or other countries in order to retain the outbound tourist traffic as domestic tourists.

6.4 Conclusion

This chapter has fulfilled its objective of presenting a summary of Botswana's tourism development history and the public and private sector recognition of regional tourism. It has justified the classification of Botswana as a periphery to South Africa's core as a result of importation of goods from South Africa and that South Africans make up the bulk of visitors to Botswana. Furthermore, it has shown that South Africa (the core) is both a significant source and destination for tourists to/from Botswana. The fact that South Africa is a significant destination for Batswana discretional travelers, provides a mitigating aspect of the typical core-periphery relationship, and also serves to illustrate how the current LVHV focus has painted the country into a corner regarding organic domestic tourism development. Domestic tourism has been rendered a missed opportunity for the Botswana economy. Though there are ongoing efforts to diversify the tourism product to cater to the domestic and regional market, they are competing for financial support with the already-established LVHV product.

This chapter has determined that regional tourism has been mentioned in passing in government documents. It has been recognized by the DMO, especially the South African market in both its self-drive and fly-in capacities. This recognition has taken the form of catering to the self-drive market by providing camping areas and licensing operators who cater to this market. The fly-in market has packages developed and advertised through various media and travel agents. However, the VFR market that originates both in South Africa and other neighboring countries is not catered to at the level of public sector recognition. It is recognized by the private sector which provides transport in the form of cross-border buses and minibuses. Entrepreneurs also cater to it through the development of guesthouse and entertainment facilities oriented towards the urban audience or visitor.

Finally, this chapter has identified three reasons why regional tourism is not as well developed as its volumes would suggest. First is the existence of a direct relationship between domestic and regional tourism. If the environment is inhospitable to domestic tourism development, then it necessarily discourages regional tourism too. Second is the presence of an accessible and more attractive tourism product nearby. Given core-periphery dynamics, the core has all the infrastructure and marketing facilities to attract tourists who would potentially have visited the periphery (Botswana) and put up with its inadequate facilities, had the option of visiting the core not existed. Third is the introduction of the idea that the consumption of tourism, particularly an exclusive and nature-based tourism product, happens in stages. Therefore, potential domestic tourists need to go through these stages in an environment, and consuming a product, external to the domestic one, before they can appreciate, understand and consume their domestic product.

CHAPTER SEVEN: DEVELOPMENT OF REGIONAL TOURISM IN ZAMBIA

7.1 Introduction

This chapter is the second of the four case studies presented in this thesis. Its purpose is to examine the extent to which Zambia's public and private sectors have identified the regional tourist market in their planning of tourism development. The chapter unfolds in three sections: Section One provides an overview of tourism development in Zambia and presents the rationale for government prioritizing the development of international tourism. Section Two analyzes inbound tourist data and empirical research undertaken on Zambian tourism to determine the extent to which the regional tourist market has been recognized by both the public and private sectors. Section Three presents a discussion on Zambia in the context of the core-periphery evaluation framework.

7.2 Background of tourism development in Zambia

The modern state of Zambia (Figure 7.1) began its history as the British administered protectorate of Northern Rhodesia in 1911 (Hole 1967). At the time, because no large deposits of mineral wealth had been discovered, little was devoted to developing the protectorate's physical infrastructure or human resources, with the region's value being that of a labor reserve for the mines and the farms of Southern Africa (Berry 1993; Myers 2003). With the discovery in 1928 of copper ore deposits in the Copperbelt region, railways and roads were developed to facilitate its extraction and export (Rizzer 1995).

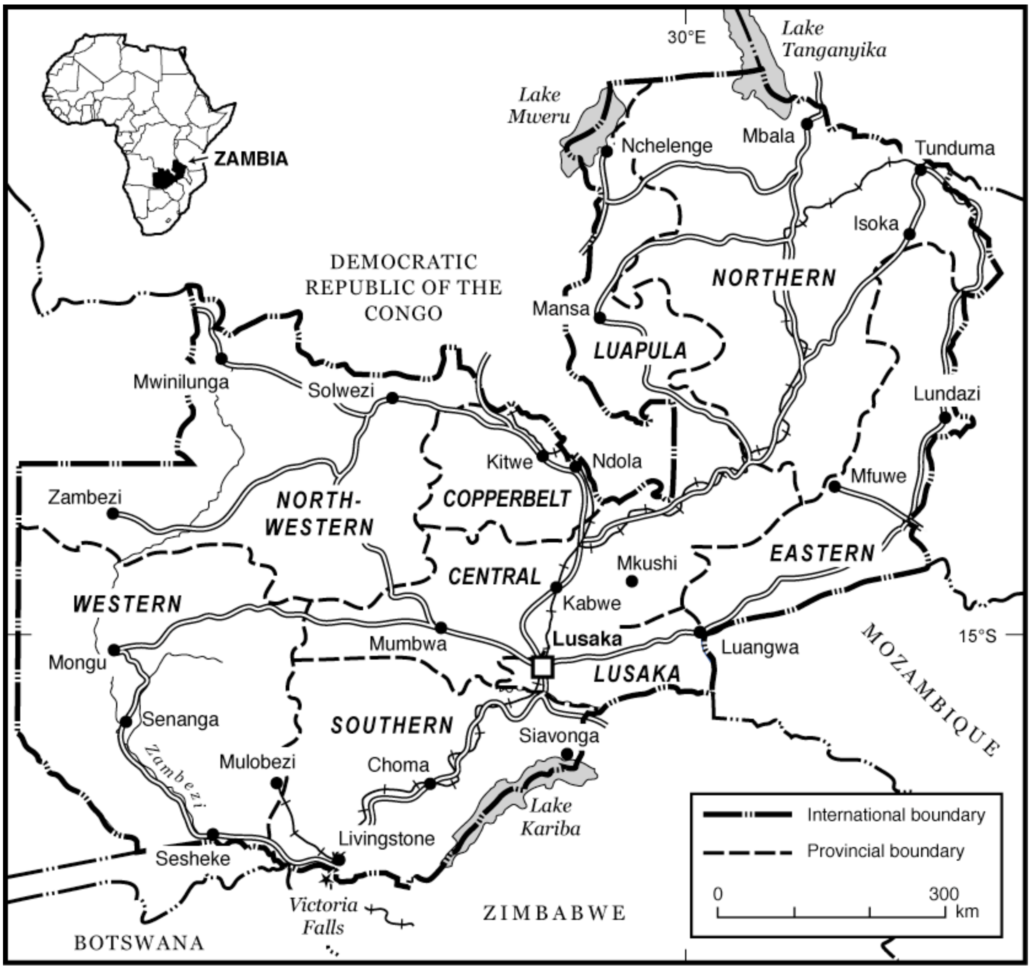

Figure 7.1: Map of Zambia.

Between the late 1800s and 1964, Zambia's tourist product was essentially wilderness, wildlife and adventure, and its target markets were the overseas and regional markets, of which Southern Rhodesia and South Africa provided the largest number of visitors (Carwardine 1988; Moonga 1999). According to Moonga (1999), tourism in Zambia has always been centered on Victoria Falls, and Zambia has long formed part of the Southern African regional tourism circuit which included inter alia, Kruger National Park, the Zimbabwe Ruins, Wankie National Park, and Victoria Falls (Teye 1986; Moonga 1999). At the turn of the 20th century, Northern Rhodesia's tourism development was private sector-driven, with the colonial government gradually making interventions aimed at improving the infrastructure and quality of tourism in the country by engaging the South African Tourist Corporation (SATC) in 1947 to do an assessment of the country's tourism and to recommend improvement measures (Moonga 1999). This consultation with SATC resulted in the colonial government setting up a Hotel Board in 1950, which regulated accommodation standards, building an international airport and a cultural village in Livingstone, while also introducing boat transport (Moonga 1999).

Following independence in 1964, Zambia's new government looked to tourism as an economic driver and therefore supported the industry's development by establishing a national airline, Zambia Airways, and the opening of Lusaka International Airport (Moonga 1999). These efforts at developing tourism were jeopardized in 1965 when Southern Rhodesia unilaterally declared its independence from Britain (UDI) and in so doing negatively affected Zambia's economy. Copper was Zambia's economic mainstay at the time and it relied on a railway passing through Southern Rhodesia to access the port of Beira (Teye 1986). Furthermore, with regard to tourism infrastructure and personnel, the management and control of Zambia's tourism was done from the Southern Rhodesian capital with personnel from there dominating the industry in

Livingstone (Teye 1986; Moonga 1999). The Zambian government moved to fill the gap created by the withdrawal of Southern Rhodesian companies from Livingstone by creating the Zambia National Tourism Bureau (ZNTB) to continue promoting tourism to Zambia in overseas countries, with the Zambia Travel and Touring Company (ZTTC) being created under the ZNTB to serve tourists visiting Zambia (Moonga 1999).

In 1969, the mining industry and all other private industries were nationalized in a process named 'Zambianization,' which sought to put Zambians in the management positions of key industries as part of the ruling party's socialist bent, aimed at improving lives of all Zambians (Libby and Woakes 1980). The income from copper exports enabled government to implement its socioeconomic agenda. Though the nationalization of the economy has been criticized (Mulungushi 2007), it must be noted that the process helped the creation of several of the prerequisites for regional tourism development already mentioned in Chapter Four. Nationalization created for a time, a group of workers with a steady income, benefit packages, and holiday costs made affordable by government-subsidized transport and accommodation (Kagulura 2004). Through Zambianization, Zambians were able to take over the positions previously held by non-Zambian foreigners and adopt the lifestyle of leisure travel that came with it (Kagulura 2004).The falling copper prices in the early 1980s caused a decline in Zambia's economy, and government was caught in the debt cycle of borrowing heavily from the World Bank and the International Monetary Fund (IMF) to balance its budget and boost copper production in order to increase income (IPRSP 2000).

Throughout the 1980s, Zambia's economy declined and due to government's increasing debt, it was forced to acquiesce to demands by IMF and The World Bank to make structural adjustments in the economy (Rizer 1995). In 1991, multi-party elections brought a new government into power which implemented the structural adjustment programs. This meant government withdrew involvement in all activities not core to the running of the state; essentially a reversal of the Zambianization process (Mulungushi 2007). The majority of State Owned Enterprises (SOEs) were privatized throughout the 1990s. Currency exchange controls were removed and market forces were allowed to act upon and shape the economy (Kapoor 1994; Republic of Zambia 2000; Thomson 2004).

7.2.1 Tourism development and attendant expectations

Despite the government's shift towards neoliberal programs, Zambia's economic growth did not stabilize to the extent expected, and poverty figures even rose as a direct result of the removal of government's social nets and subsidies (for food and fuel) (Kapoor 1994; IPRSP 2000). Copper prices remained low; HIV/AIDS incidents rose as a result of increasing poverty and inflation, and it quickly became evident that the Zambian economy required more stimuli and growth before market forces could become operational (IPRSP 2000). Several sectors (including mining, manufacturing and agriculture) were reviewed to determine their potential to contribute to national economic growth and this exercise resulted in tourism being reclassified from a social to an economic sector in 1996 (Republic of Zambia 1997a). This was done "in recognition of the sector's potential to contribute to economic development in terms of… foreign exchange earnings, employment and income generation, contribution to Government revenues, promotion of rural development, poverty reduction as well as its ability to perform the role of a sustainable development catalyst" (Republic of Zambia 1997a: 2). In 2002, the national profile of tourism was further elevated when government put it second only to agriculture in terms of state prioritization of economic sectors (Hamilton et al. 2007).

Tourism's mission in Zambia is "To contribute sustainably to the economic well-being and enhanced quality of life for Zambians through government led, private sector driven, quality product developments that are consistent with the protection of the unique natural and cultural heritage" (Tourism Policy 2003:5). Government's role in the development of the tourism industry is to provide guidance in the form of policies and legislation as well as resolution of any conflicts or overlaps arising. The private sector's role is to "take the lead in the development of tourism initiatives and the implementation of investment plans with the assistance of" (Republic of Zambia 1997: 68) government structures, while the private sector and is expected to "bear the risks of investment and the responsibility to satisfy tourists" (Tourism Policy 1998:16).

7.2.2 Tourism product and geographic spread

Zambia's leisure tourism is concentrated in the southern part of the country, while business tourism is centered on Lusaka and to a lesser extent, the Copperbelt. Tourism development is heavily biased towards Livingstone, with government, private sector and donors availing resources to build up this area and its neighboring park and game management areas (Duiker 2009). The competitive advantage of Zambia's tourism product is described as its pristine, unspoiled and uncrowded wilderness and wildlife product (Bannerjee et al. 2007; Mattoo and Payton 2007; Republic of Zambia 2008). Though these products make the country an attractive destination to the middle and top tiers of the nature tourism source markets, Zambia is not the only country in the region to offer them (Weaver 2001; Pope and Messerli 2009). It is in fact considered to be an expensive destination offering less value for money than its neighbors (Duiker 2009). The higher expense is primarily due to limited international airlift into the country and expensive accommodation (Rogerson 2003; Hamilton et al. 2007). The narrow range of tourism products available in Zambia makes it an ideal excursion destination where tourists spend no longer than four to five days of a multi-destination tour (Dieke 2002). Having a limited tourism product discourages repeat visits because foreign travelers feel all available tourist activities are exhausted in one visit, so a repeat visit would yield nothing more or different to what they have already experienced (Husbands and Thompson 1990). The interest of travelers to visit Zambia is complicated by the leisure tourist season lasting only between six to nine months per year; this, because the road infrastructure is poor and does not allow straightforward access to most national parks, luxury tourism lodges and bush camps (Duiker 2009; Hodson 2007). Hotels in the towns, catering to business tourists, experience little seasonality (Hamilton et al. 2007).

7.3 RESEARCH FINDINGS

Collection of all official national statistics falls under the mandate of Zambia's Central Statistics Office (CSO). Data on the total number of visitor arrivals between 1964 and 1995 were obtained from the CSO, while those collected after 1995 were provided by the Ministry of Tourism, Environment and Natural Resources (MTENR).

7.3.1 Zambia inbound tourism arrivals

The number of inbound tourists to Zambia experienced marked decreases in 2003, 2009 and 2012 (Figure 7.2,) with visitor numbers being consistently below 600,000 per annum until 2005-2007 when the number rises above this mark. This country's inbound tourism numbers have been touched by the effects of the liberation struggles in southern Africa (Teye 1986), the oil embargo of 1974, the fall in global copper prices in 1975 (Daniel 1979), and the economic downturns in the 1980s and early 1990s (Moonga 1999). Growth in tourist arrivals began after 1995 and reached a peak volume of 900,000 in 2007.

The most important countries in terms of inbound tourists to Zambia between 1997 and 2012 were Zimbabwe, South Africa and the United Kingdom. Due to the economic sanctions experienced in their country during this period, large numbers of Zimbabwean tourists can be discounted as mainly due to non-discretionary travel.

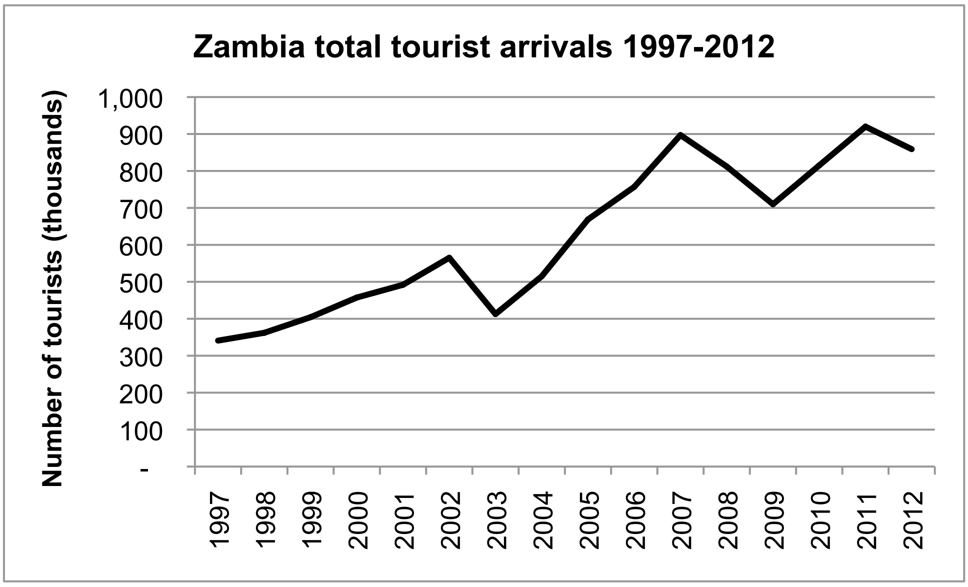

Figure 7.2: Zambia tourism arrivals and receipts: 1979 – 2008.

The most popular way to travel to the country was by road which accounted for about 80% of total inbound tourists while air transport accounted for 20%. The importance of air transport increased between 2001 and 2007 due to Livingstone being packaged and sold to South Africans as a weekend getaway destination at a time when the attractiveness of Zimbabwe's Victoria Falls was waning (Cope 2005). This packaging of Livingstone resulted in an increase of flight links between Johannesburg and Livingstone, provided by both scheduled and budget no-frills airlines (Cheelo 2009).

7.3.2 Recognition of regional tourism in Zambia's public and private sector

Zambia went through a traumatic period of Structural Adjustment Program which relegated many previously-well-to-do people to poverty or survivalism. The effects on the economy continued to have a negative impact on economic planning so that instead of reviewing government planning documents to determine the extent to which regional tourists had been recognized, the researcher reviewed them to determine the extent to which tourism as an industry was recognized. In other words, tourism in Zambia had been dealt an economic blow that regressed its development when compared to the other case study countries.

There was a tourism development effort underway in Zambia during the mid-to-late 1990s following privatization. Many state-owned tourism lodges, hotels and properties were sold to private individuals or companies, thus freeing government to legislate and administrate the sector's development (Kagulura 2004). The planning of how government would do all this was supported and financed by the donor community, particularly the World Bank and European Union. This was done under the banner program: Zambia Tourism Development Program – Foundation Phase, which sought to determine what resources Zambia had and what market the country could target in order to maximize income from tourism. These activities took place in the late 1990s.

Though tourism is recognized in the country's development planning documents, no direct reference is made to the regional tourist market, as defined in this thesis. The Ministry of Tourism, Environment and Natural Resources' strategic plan makes a brief mention of how "the tourism sector covers the domestic, regional and international dimensions" (Republic of Zambia 2002: 9), but says nothing more on the topic of regional tourism. Wherever regional tourism is mentioned, it refers to national regions and not the regions beyond national borders. It is therefore reasonable to conclude, after examining key strategic planning documents for tourism, that there is no indication of an interest in developing regional tourism (from countries other than South Africa).

The Tourism Policy is emphatic on the point that in tourism development, the tourism industry is private sector-driven and government led. The role of government is to provide an enabling environment for private sector to function. It is therefore left to the private sector to recognize the opportunity presented by the regional market and to package tours and products relevant to it. When seen in this light, government therefore supports regional tourism albeit indirectly. By facilitating the investment of two hotels by Sun International in Livingstone – the Zambezi Sun (3 star), and the Royal Livingstone (5 star) – government effectively supported both regional tourism and international tourism. This is a problematic view, because as will be seen, the private sector has its own agenda and if not given better and clearer orientation by government, will only continue to maintain the status quo of focusing exclusively on international tourists.

7.3.3 Ownership and investment in Zambia's tourism industry

In the 1990s, the Zambian government offered investment incentives which included five-year tax breaks, profit repatriation and other forms of incentives aimed at assisting business to attain sustainability and growth through the first five years (Mubanga 2004). Once the five year tax-free window elapsed, however, many of these businesses pulled out, leaving behind empty structures and little capacity built. The tourism sector did not have much of this kind of investment but slower investment focused on lodges and safaris. The private tourism sector that had been mandated by the Tourism Policy to drive tourism development in Zambia, has been characterized as “small, fragmented and largely distrustful of the government” (Hamilton et al. 2007: 5). It is dominated by foreign capital and consists of a large number of small entrepreneurs and a handful of multi-national companies (Inambwae 2009).

Investment in the tourism sector is dominated by South African investors, followed by British investors, with Zambian investors (in solitary or joint ventures) in third position. Indigenous Zambian investors make up the bulk of the volume of solitary Zambian investors, and are mainly owners of bed and breakfast facilities and are increasingly engaged in small ventures that cater to the adventure industry in Livingstone. Despite Zambian investors being third in investment figures, financing for small tourism businesses in Zambia remains a significant constraint to the industry’s growth, as very few sources of tourism financing are available. Much influence on the tourism industry is wielded by the bigger businesses, the hotel industry, the hunting and game ranching associations, as well as the adventure businesses (Duiker 2009).

Unlike the situation in Botswana, guesthouses in Zambia are legally registered and their owners are invited to become members of the Tourism Council of Zambia (TCZ), the umbrella body of the tourism private sector. Involvement of local investors in tourism started with the privatization exercise during the early 1990s. Government workers were retrenched and as a political gesture, allowed to buy government houses at affordable prices. Some of the retrenched workers converted these houses into guesthouses, deciding to cash in on "this tourism thing," a means to earn an income. This section of the tourism economy has evolved on its own with no policy or guidance, save for the licensing requirement by government (Kagulura 2004).

Where this lack of experience and knowledge of the local investors becomes clear, is in marketing efforts. Zambia's foreign investors in the tourism sector have experience in attracting a clientele that will pay the prices they have set. They therefore work together to package their product for this market, and because the government's marketing support mechanisms (through the Zambia Tourism Board) favor well-organized companies experienced in international marketing, this is the product that is visible (Chilufya 2004). There are more affordable products available, but the owners of these products have not organized themselves well enough to receive assistance for international or regional marketing (Chilufya 2004).

When representatives of Zambian investors were asked specifically about the degree to which Zambian SMEs were cognizant of the regional tourism market, and if they catered to it, they indicated the following:

> *Because it is the private sector and not the public sector driving the tourism industry, and because private sector is motivated by profit, they will raise their prices to the maximum that the market can absorb. For example, once several guesthouses or hotels raise their prices and their competitors realize they can get away with charging higher prices, the cost of accommodation then rises, and sometimes becomes too expensive for many domestic or regional tourists. Due to this profit motive, private sector does not make any distinction between international and regional tourists; it only cares that clients are able to afford its product* (Bwalanda 2004; Cope 2004).

7.3.4 Development of domestic and regional tourism

Though acknowledged in the tourism policy as having potential to contribute to local employment and local businesses (Republic of Zambia 1997), domestic tourism has not received much structured attention from government. The tourist product available to the local domestic tourist is the same thing that is available to the international visitor: wilderness, wildlife and adventure. This product is viewed as being the sole preserve of foreigners and its expense, coupled with the hostile attitudes of some tourism establishments towards locals (Livingstone 2013; Punish 2013) conspire to discourage domestic tourism. From the interviews conducted, however, the narrative used to explain why Zambians were not participating in domestic tourism focused on culture,

> *"Tourists in Zambia are mostly not indigenous Zambians. Zambians don't appreciate travel, and there is a perception that to travel away from your home on vacation is only for foreigners, whites, not for Africans. The African upbringing and culture does not instill an appreciation for travel. Perhaps now with the Zambia's population under 30 being at 80%, and the country being very youthful, and the children growing up in a more westernized environment, the appreciation for travel will be enhanced" (Mubanga 2004).*

> *"Their [Zambian] priorities are very different. If they have extra money, they'd rather build a house or invest in something that could bring in money, rather than take a holiday…also travel for leisure is not in our nature. They prefer to rest at home. However, there are Zambians traveling outside the country to shop. BA [British Airways] sometime in the past year or so put out statistics that about 30 million pounds were spent by Zambians shopping in the UK... There are certain classes of people who take holidays regionally though and Zimbabwe is popular with Zambians" (Zulu 2004).*

This researcher was privy to the market studies used to instruct the final orientation of the tourism policy. The final report indicated that its researchers failed to capture expenditure of the cross-border visitors from neighboring countries due to unsuccessful interviewing. As a result, the best indicator they could provide of regional tourist spend and behavior was the anecdotal evidence that, "there are substantial numbers of Zimbabweans, Congolese, Tanzanians, Malawians coming into Zambia and though their average daily spend is not high, the total spend is considerable" (Transtec 15 1999: 23). This lack of market research that could persuade the private sector to engage with an unfamiliar market due to its potential, has caused to a large extent the neglect of regional tourism development. To come to this conclusion would, however, be erroneous and premature. Interviews with the Zambia Tourist Board (ZTB) General Manager in charge of tourism promotion in southern Africa, revealed ongoing efforts to attract the regional market to visit Zambia, although ***none*** of these efforts or outlooks is captured in any of the documents reviewed. The Zambian High Commission in Pretoria, South Africa, hosts the ZTB Southern Africa office. When asked why none of the office's efforts are reflected in Zambia's tourism planning documents, Cheelo (2004; 2009) readily acknowledged that the dissonance between what is on paper and what is happening on the ground is created by experience. Though they started out exclusively targeting the South African market, as dictated by the tourism policy, the ZTB officers' experience of interacting with visitors at the High Commission and with tourism and trade attaches, has shown them that there is a need to do more with regional markets.

The function of this office is to promote Zambia as a destination to its different target markets within Southern Africa, and to identify emerging market segments within the region. They have recognized the importance and potential of the regional market and have selected three countries to focus their marketing resources on: South Africa, Namibia, and Zimbabwe (Cheelo 2009). Factors considered by ZTB in prioritizing markets and segments to target, include how easy it is to travel to Zambia, evidence of large numbers of outbound tourists from these countries, as well as indications that the target markets are not hesitant to move and travel within the region. They target Botswana as a market, though it receives less attention than the main three markets, and they are in the process of extending their marketing efforts to capture the Mozambican market. ZTB has leveraged the proximity of the three target markets to Zambia by specifically targeting the self-drive and business segments. Zimbabweans primarily visit Zambia for business and VFR, Namibians visit mainly for leisure, and South Africans visit for both business and leisure. There are also a significant number of VFR tourists to Zambia as a result of the legacy of the Federation which had allowed people to live, work and settle in any of the three countries (Cheelo 2009).

ZTB's approach to marketing Zambia in the selected regional markets is three-pronged: the office goes through the travel trade, the media, or directly to the consumer. ZTB attends shows in South Africa that target the 4x4 market, such as the Getaway show, and the BEELD newspaper's travel show. They also sometimes pay for space within shopping malls in market-specific suburbs to promote Zambia as a destination, especially in the run up to long weekends or the holiday season. There are expectations that with the new ZTB structure and with more resources provided to the Southern Africa office, they will be able to target countries further afield in Africa (Cheelo 2009).

7.4 Conclusion

The Zambia study presents a case where government gives the private sector absolute leeway to drive tourism development. It also provides a case where, unlike Botswana, the domestic tourism market, due to economic hardship, has not matured to a point of being able to undertake discretionary travel. Though some Zambians participated in domestic tourism travel during the copper boom years, the 1990s and the SAPs eroded the gains made in domestic tourism development. In this way, Zambia shows all the hallmarks of a typical periphery where tourists from the cores of South Africa and Europe are given the most attention in planning and marketing. The case of Zambia shows in a very clear way, the dissonance between what the tourism policy wishes to promote – international tourism – and what has been found to be more practical and pragmatic by those working in the field. ZTB staff based in Pretoria have, as a result of operating in the environment of the core, South Africa, been able to leverage the information and knowledge flows, and the flexibility that comes from being away from the periphery, and have identified viable regional markets. Though the hallmarks of being in the periphery: absence of innovation, and sticking to an ineffective planning process have not been resolved at their source, the marketing office has been able to pull in, from the core, solutions that are innovative.

CHAPTER EIGHT: REGIONAL TOURISM DEVELOPMENT IN MOZAMBIQUE

8.1 Introduction

This chapter explores the third of the four case study countries. Its objective is to determine the extent to which public and private sectors have recognized the significance of regional tourism and the measures they have taken to harness this source market. It unfolds in three sections, the first of which provides a background to the country's history and impetus towards tourism development. The second section presents the findings of the study concerning the recognition of regional tourism, while the third section is a discussion using the comparative evaluation matrix developed in Chapter 3, focusing on the extent to which this regional tourism development fits into the classic core-periphery framework.

8.2 Background of tourism development in Mozambique

The modern state of Mozambique (Figure 8.1) emerged from Portuguese colonization in 1975 and into a civil war that ended with the signing of a peace accord in 1992. During the period of Portuguese rule, the country's exports were primarily agricultural crops including cashew nuts, cotton and sugar (Newitt 1995). The Mozambican economy grew after the Second World War because southern Africa's mineral and natural wealth attracted immigrants from various parts of the world. The resulting increase in imports and exports prompted the Mozambican economy to diversify and to provide services such as railway, port, pipeline and tourism services.

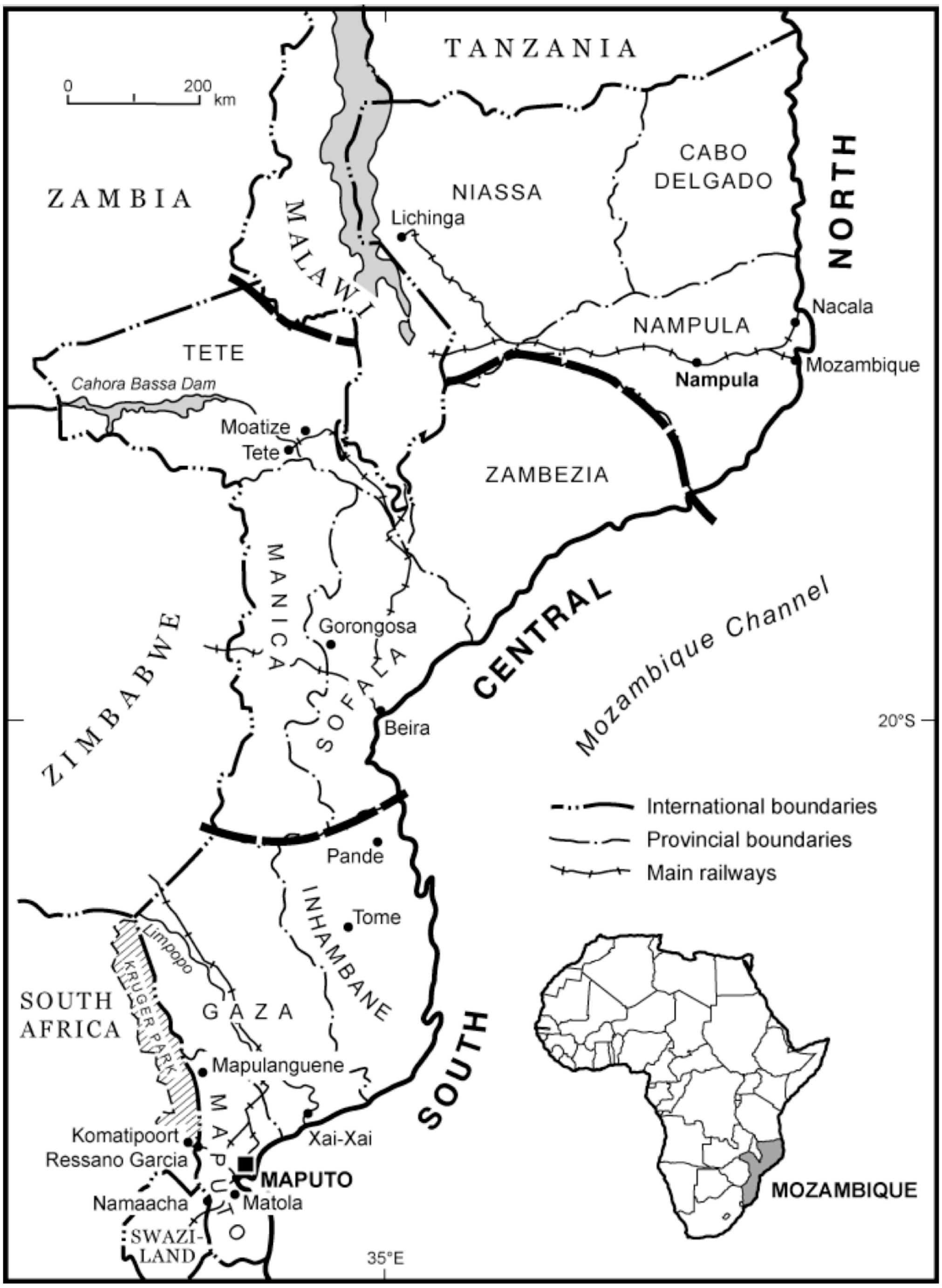

Figure 8.1: Map of Mozambique.

The tourism industry also grew during this post-war period because of the large number of regional tourists visiting from the hinterland and the number of Portuguese traveling to Mozambique, which at the time was considered an overseas province of Portugal. The second city, Beira, was a tourism destination for Rhodesians, as well as European residents of Malawi and Zambia (Alexander 1971; Newitt 1995) while South Africans of both British and Dutch extraction preferred Maputo and southern Mozambique as destinations (Alexander 1971; Newitt 1995). Mozambique's growing popularity as a tourist destination contributed to an increase in restaurants, hotels and yacht clubs (Newitt 1995) leading to tourist arrivals peaking at 500,000 in 1971 (Alexander 1971; Masinga 1996). Attributes making Mozambique attractive to this regional market were described thus:

> "*Cross the border… and immediately you are in a different world: a vivid and exciting blend of tropical Africa and Continental Europe. The country contrasts sharply with the other territories of southern Africa. There is a Latin way of life, the Continental-style coastal cities, kilometer upon kilometer of white, sandy, palm-edged beaches, hideaway islands, picturesque harbors, teeming game reserves, historic forts and settlements and much else – and they all add up to a tourist's paradise*" (Alexander 1971: 1).

Following independence from Portugal in 1975, the country suffered a series of setbacks including a civil war which ended with the signing of a peace agreement in 1992. At this point government made efforts to grow the economy again through supporting the privatization of state owned enterprises and attracting foreign investors. Several large projects increased the flow of FDI into Mozambique and included, *inter alia,* the Mozal aluminum smelter in Maputo Province, the Pande/Temane Gas pipeline, the Moatize coal mining Project and the Irish mineral sand mining project in Nampula Province (World Bank 2005). More recently, the discovery of natural gas and petroleum in the north of the country has attracted further investment from foreign companies from Italy, Australia and Brazil (Frey 2013). However, the mineral extraction projects have not been able to yield the expected employment levels; government has thus placed emphasis on tourism to fill the employment gap, particularly in areas that have attractive resources for tourism development.

8.2.1 Tourism development and attendant expectations

Tourism's contribution to Mozambique's GDP has been low since 1992 and only reached 2.5% in 2003 (FIAS and OECD 2006). Despite this low contribution to the economy, the potential of the Mozambican tourism industry to catalyze both economic and social development is reiterated by all who were interviewed for this case study. Government's view of the industry is that: "tourism is one of the few [economic sectors] that can deliver growth and employment on the scale required to make a difference in Mozambique" (Republic of Mozambique 2003: 8). The main expectations of tourism development are that it will provide employment, capital for infrastructure investment, and conservation efforts. Furthermore, tourism development is expected to provide foreign exchange to government, encourage the formation of small businesses, and have direct positive impact upon quality of life (Republic of Mozambique 2003), with Mozambican citizens participating in all the tiers of this service-centered industry (Republic of Mozambique 2003).

8.2.2 Tourism product and geographic spread

Mozambique's variety of tourism products makes it a truly unique destination in Southern Africa, given its considerable natural bounty (TII 2005). Another aspect of its offering is its history and blend of cultures, both different from its immediate and regional neighbors, which share a British or Dutch colonial past and have therefore developed a slightly different tourism product (Williams 2006). The beach and urban cultural products have been the most easily revived in the first phase of post-war development, with the wildlife product taking longer to reestablish.

Tourism development has been organized geographically to reflect the three primary regional divisions in the country: North, Central and South (Republic of Mozambique 2004). Tourism product development has been built around three key themes: water, nature and people/urban environment (Republic of Mozambique 2003). The products are sun, sand and sea for the coastal areas; ecotourism for the national parks and reserves; culture and heritage; adventure or aquatic tourism, and urban tourism (TII 2005). The South has been designated a region focused on water sports and coastal tourism. These products are targeted towards the regional and domestic markets. The Centre has been designated the eco- and adventure-based tourism area with the target market as niche international tourists. The North is designated the most exclusive beach and eco-tourism destination with a strong cultural component (Republic of Mozambique 2004).

The capital Maputo receives the highest number of tourists consisting of, a mix of leisure and business tourists (Vignati 2009). Inhambane Province, located 500 km north of the capital, receives the largest number of leisure tourists and has the heaviest concentration of investments in leisure tourism (Vignati and Laumans 2009). Despite the number of investments in this area, there remains a great need for affordable accommodation throughout the country (Visser 2009; Vignati 2010). This is because the available lodging is usually priced in South Africa Rands or US Dollars, and is thus unaffordable to most regional or domestic tourists (Vignati 2010). Transport by road is the most popular means of travel to Mozambique, contributing an average of 90% of the total number of tourists visiting the country (UNWTO 2005). This is due to the improved road network, especially the upgrade of the N4 highway from Pretoria to Maputo, which permits self-drive tourists and those taking public transport from South Africa to visit the country in great numbers (Visser 2009).

8.3 RESEARCH FINDINGS

8.3.1 Mozambique's inbound tourism flows

The data presented in this section are from various sources, namely the Ministry of Tourism's Planning and Cooperation Directorate (DPC), National Institute for Statistics (INE), the UN World Tourism Organization (UNWTO) and tourism studies funded by donors. The National Institute for Statistics (INE) is mandated to collect and disseminate all national statistics and has done so since 1998 (Visser 2004). Data on the Mozambique tourism industry are considered incomplete or unreliable by researchers as they vary significantly depending on the source of the information (Visser 2004; Jones 2007). Despite the variations, there has been a documented annual increase in tourist arrivals since 2001(Figure 8.2).

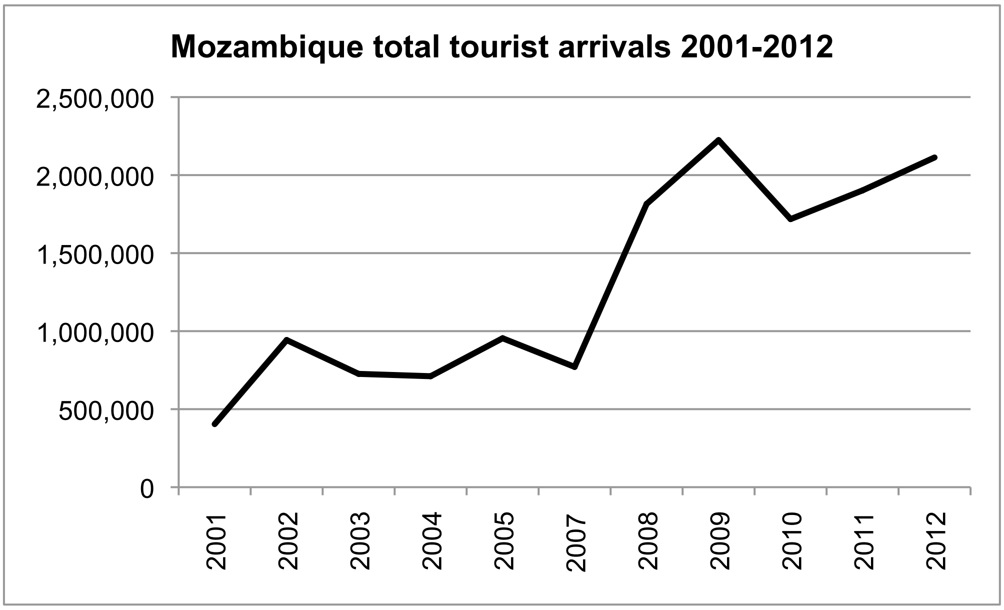

Figure 8.2: Total inbound visitors to Mozambique: 2001-2012.

Once tourism arrival figures are disaggregated according to the varied global source regions, it is evident from averaged numbers between 2004 and 2008 that Africa as a region contributed 90% of all inbound tourists. Europe contributed 5% while the Americas and East Asia and the Pacific contributed 1% each. When these arrival data are further disaggregated to determine the source countries of these tourists, South Africa emerges as the main source, contributing 41% of total tourists in 2008 (1.1 million), followed by Zimbabwe (31%). Portugal and the United Kingdom are the main contributors of inbound European tourists, while the USA and Brazil are the main American contributors. Visitors from Asia and the Pacific are mainly from India and Pakistan who primarily travel for business purposes.

South Africa is the dominant source market for tourists entering Mozambique, so it is important to understand what characterizes it. The South African market is not uniform and may be segmented into three groups (Dramos 2009; Visser 2009). Those at the higher end of the market fly into the country and stay at 4 or 5 star hotels. They usually fly directly from Johannesburg to destinations in the North or Centre of the country, with Vilankulos, Pemba and other island resorts being popular destinations for this market segment (Baker 2010). The second group of South African tourists is the self-drive and self-catering group who stay at 3 or 2 star hotels, self-catering lodges or apartments usually belonging to or managed by South Africans. They usually pay ahead of travel to accounts in South Africa and bring in a great quantity of consumable products (Abrantes and Pereira 2003; Pascoal 2004; Abacar 2004; King 2010). The third group is those at the lower end of the market who self-drive carrying their own means of accommodation (caravans, tents) and stay at inexpensive facilities such as backpackers, lodges or campsites (Abrantes and Pereira 2003). As Baker (2010) points out, there is an emerging fourth group of South African tourists to Mozambique: the so-called Black Diamond market consisting of,

> *young wealthy black South Africans keen to explore beyond their borders… relatively inexperienced in travel. They like the night life, food, and will travel with friends or on a romantic break… but they need a reason to go, a festival or an event (Baker 2010).*

They travel in groups of friends or colleagues, and use their own cars or go by bus. Generally, they stay at inexpensive accommodation and seek the beach and urban cultural product in Mozambique, going as far north as Tofo beach in Inhambane Province (Dramos 2009; personal observation). Due to the limited infrastructure and non-availability of preferred foods and other supplies outside the main cities, as well as the high extent of South African product importations, self-drive travelers carry the consumable supplies they will need into the country as well as their own camping and recreation equipment (Abrantes and Pereira 2003). The peak holiday season for South African leisure travelers visiting Mozambique is early December to mid-January (Abacar 2004; Baker 2010). Other peak travel periods are Easter, school holidays, long weekends and short weekend getaways, mainly to Maputo (Jaime 2004; Baker 2010).

The majority of tourists from the neighboring countries of Zimbabwe and Malawi are thought to mostly be in transit or traveling for trading purposes (Visser 2004; Dramos 2009). Whatever their purpose of travel, over the past 5 years these visitors have been assisted by Mozambique's improving bilateral relationship with SADC countries, which has led to a relaxation in visa requirements for some countries. Residents from South Africa, Botswana, Swaziland, Mauritius, Malawi, Tanzania, Zambia and Zimbabwe are now allowed to enter the country without a visa for visits of less than 30 days (Matsumane 2009).

8.3.2 Recognition of regional tourism in Mozambique’s public and private sector

The tourism policy provides the vision and guidelines that Mozambican tourism should develop (Republic of Mozambique 2003). It differs from those of Botswana and Zambia in two fundamental ways. The first item is the policy’s acknowledgement that most African countries have focused only on developing niche products, mainly wilderness and wildlife, which has limited their scope for tourism product and industry development. It recognizes that as lucrative as it might be to focus on attracting the high-end low-volume spectrum of the market, this market will not adequately address the objectives set out in pursuing tourism’s development. The policy therefore, identifies a mixed product of coast, wildlife, adventure and culture as its competitive advantage and raises the prospect of mixing mass and niche tourism products to attract various markets and ensure sustainable development of tourism. The second difference in

Mozambique's tourism policy is its outright and detailed recognition of regional tourists as a key tourism market worthy of attention and strategic planning. Although the overall policy emphasizes that Mozambique has the potential to become an international destination, domestic and regional tourism are recognized as pillars for the long-term development of tourism in the country. The regional tourism market is essential to the policy's overall objective of developing sustainable tourism and it is important to the goal of product diversification.

The Strategic Plan for the Development of Tourism in Mozambique (SPDTM) (Republic of Mozambique 2004) recognizes that Mozambique is not well known in global tourism markets and acknowledges building the country's global brand and image will take time and money. As a result of limited finance to undertake global promotion campaigns, the SPDTM has outlined the short-term strategy to overcome this challenge: "…linking into tourism in South Africa is a major opportunity for Mozambique …and it is likely that tourism patterns in South Africa will partly determine the future structure of the sector in Mozambique" (Republic of Mozambique 2004: 36). It therefore plans to attract tourists already visiting South Africa and encourages them to make excursions to Mozambique. Despite this deliberate strategy to "effectively position Mozambique as an 'add-on' … to already established destinations" within the SADC region (Republic of Mozambique 2004: 40), the plan indicates that the country's long-term view should be to ensure it is "positioned as a destination in its own right, not merely an add-on to South Africa" (TII 2005: 67).The strategy goes further and identifies South Africa, Zimbabwe and Swaziland as its natural markets – or low-hanging fruit – as a result of the existing cultural synergy and the geographical proximity.

8.3.3 Ownership and investment in Mozambique's tourism industry

The Mozambican tourism industry is dominated by foreign investors, mainly South Africans and Zimbabweans who invest alone or in joint ventures with nationals (Dombo 2004). The investors have focused upon the coastal/beach product, though there are a few who are now moving to invest in the interior of the country (Mendonca 2009). South Africans are mainly individuals or groups of friends or business partners who build semi-permanent tourist accommodation targeted at the budget - camping and self-catering - South African and Zimbabwean market (Abacar 2004). Many of these establishments are not registered with the Ministry of Tourism so the visitors patronizing them are not included in the official statistics. Furthermore, these South African tourists pay for their holidays in South Africa and bring consumable products with them, resulting in the local economy gaining only through unskilled employment of local communities (Pascoal 2004).

The Southern Mozambique Hotel Association (AHSM), Mozambique's umbrella organization for the tourism private sector, is the recognized voice for the private tourism sector. This umbrella organization was formed in 2002 and its membership is drawn from all regions of the country. However, it is almost exclusively made up of accommodation providers and reflects the southern concentration of tourism infrastructure. The objective of the association is to lobby government to improve the operating environment for tourism and it also endeavors to promote Mozambique as a destination (Quesanias 2009). Although accommodation providers are an important aspect of the tourism industry, influencing the volume of tourist flow to a destination, the private sector in tourism is much broader than just hotels. It includes other lines of service such as restaurants, dive shops and budget accommodation facilities that either do not qualify or do not desire to be part of the AHSM (Quesanias 2009).

The top three investors in Mozambican tourism over the period 1990 to 2009 were South Africa, Mauritius and Portugal (Figure 8.3). South Africa has remained the overall largest investor in the country's tourism industry, investing mainly in medium-sized hotels or resorts. Other African investors include Malawi, Zimbabwe and Malawi, which are in the top twenty of the investor list. Unrecorded investments of capital by South Africans below US$50,000 –the amount the CPI requires before granting "investor" status to a person or company – is estimated to be far in excess of what is recorded in CPI data. This contributes to the under-reporting of tourism figures and makes it difficult for both the public and private sector to plan effectively around tourism development and regulations (Vignati 2010).

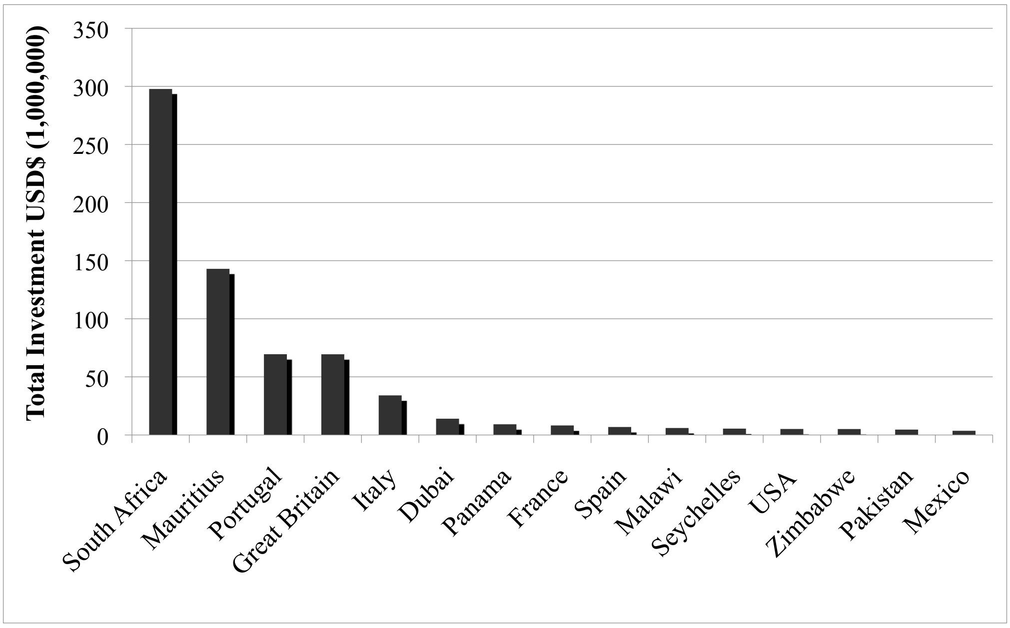

Figure 8.3: Foreign tourism investment in Mozambique 1990 to 2009.

8.3.4 Development of the domestic and regional tourism market

Where the development of the domestic and broader regional tourist market is concerned, there are three factors that influence it. First, with respect to the domestic tourism market, it is assumed that poverty is what impedes this development. It is true that to the greater part of the Mozambican population, tourism is not a priority because they have to see to more pressing needs. There is, however, a significant part of the population in what the African Development Bank (AfDB 2011) considers the 'lower-middle class' as well as the emergent middle class, who have some disposable income to spend on travel. The problem they encounter is a lack of local product or local places to spend their tourism money. They shun the South Africa dominated accommodation sector for two reasons. First, it consists of mainly semi-permanent structures made of local materials. This may be a novelty to a market like South Africa that is accustomed to living in formal permanent structures. For the local market, particularly this rising middle class which is only now rising above semi-permanent housing and would prefer the comfort of a developed environment, it is inappropriate. This aspect of the existing tourism infrastructure is not only relevant to the domestic tourism market but also to the broader regional market. Mozambican-based niche tour operators dealing with clients from other African countries (namely Senegal and Nigeria) or emerging markets (Russia, former Eastern bloc, eastern European countries) are forced to send them only to South African destinations and not to Mozambican destinations. This is because,

> *We are dealing with high-end tourists who pay a lot of money for their holiday… they are very demanding ... we send them to South Africa… if we bring them to Inhambane, where are we going to put them? There are no hotels for this class of people… the only places in Mozambique I can send them is Maputo or to the luxury island hotels in Cabo Delgado or Bazaruto (Gustinelli 2011).*

The second reason why domestic tourists shun the tourism product in Mozambique is that the South African investors in tourism are perceived as discriminating against Mozambican nationals as tourists. Cases of Mozambican nationals complaining of not being allowed into beach resorts owned by South Africans have appeared in the print media. Other challenges to accessing these beach lodges include the stipulation that reservations can only be made by calling a South African booking centre. The discussion of a few of these cases in the media serves to spoil the appetite of potential domestic tourists because no one wants to deal with discrimination when they are supposed to be on holiday. Furthermore, Gustinelli (2011) characterized domestic tourists, particularly those from Maputo, as being last minute travelers and not respecting time, which does not augur well for the tour operator. He gave an example of what had happened when his company tried to engage the domestic market,

> *… I called them to find out what time they would be arriving because they were already late. They said they just left Maputo. It was already very late. I told them where to go and I went home to sleep. I am [the operator] supposed to meet the client when they arrive. It is difficult when the client does not respect time. It is better they arrange their own holiday" (Gustinelli 2011).*

This has contributed to those Mozambicans who are able, seeking holidays outside the country, mainly in South Africa and beyond. South Africa is a natural option for holidays due to its easy accessibility via road transport and due to the affordability of packages sold by travel agents. There is also a large flow of VFR tourists into South Africa due to former Mozambican families that fled to and remained in South Africa during the war years. South Africa is also attractive because of the products it offers and the destination itself, which is, "*clean and organized and affordable. Not what we have here in Mozambique. It is important for the children to see something different and positive*" (Pires 2010).

There is indeed heavy financial leakage of potential tourism revenue from domestic Mozambican tourists due to spending in South Africa instead. The proximity of Nelspruit to Maputo provides the opportunity for the middle class of Maputo to spend weekend getaways in Nelspruit or Johannesburg (Neves 2004; Dramos 2009). Furthermore, Mozambicans have also invested in second homes in Nelspruit, Johannesburg and Durban, making it easier for them and their friends to take vacations in South Africa (Dramos 2009). It should also be noted the outbound market of Mozambicans has increased with the country's economic recovery and increased freedom of movement within SADC. Mozambicans were the highest spenders in South Africa in 2005-2009 (South Africa Tourism 2010). They are said to be significant supporters of Nelspruit's economy because of weekend shopping and leisure excursions. The growing number of Mozambican students in South African tertiary education institutions simply serves to increase this regional travel, as does the traditional labor migration, whether for mine jobs or for other skilled jobs in South Africa.

8.3.5 Evolution of Regional Tourism

The purpose of this chapter has been to determine the nature of regional market recognition in Mozambique's policy and planning documents and in practice. The regional market has made an impact on tourism development goals, particularly in the southern region of the country. In the marketing planning, currently implemented by INATUR, the national destination marketing organization, the primary regional market focus is on South Africa. There are also plans to market more deliberately to Zimbabwe, especially because INATUR attends the Zimbabwe Travel Fair, and to develop the cultural synergy market of Angola

(Lucas 2009). The view of neighboring countries as natural markets, where people travel regardless of any promotion efforts on the part of government or INATUR, has led to a growing propensity to concentrate resources on attracting the overseas tourist market (Lucas 2009). Though the domestic market has been recognized by the government as being significant and worthy of development, there is still no cogent strategy exploring it. INATUR, for its part, helps to promote domestic tourism by collaborating with travel agents and tour operators in road shows, workshops, seminars and events where the tourism brand can be promoted. It also helps to create accessible packages and raise awareness among Mozambicans of what their country has to offer as well as travel opportunities available (Momande 2009).

INATUR's domestic marketing efforts are made more difficult by South Africa Tourism's Sho't Left tourism promotion's efforts, which specifically targets young Mozambicans to travel to South Africa. This has been achieved through the introduction of on-line and television video media, as well as a dedicated website (www.southafrica.net/mozambique), billboards along Maputo's streets, and at the airport. Furthermore, the Zambia Tourism Board's southern Africa office has identified Mozambique as a country with a growing outbound demographic and has targeted this market segment for its promotional efforts (Cheelo 2009).

8.4 Conclusion

This chapter has examined the recognition of regional tourism in Mozambique. It has emerged that Mozambique is the first case study country to publically and actively acknowledge the significance that the regional tourism market plays in the nation's economy. The national tourism policy and the strategic development of tourism documents acknowledge the importance of regional tourism, particularly the South African market. The private sector recognizes the importance of the South African market and caters to it primarily because most investors in tourism are of South African origin and therefore best understand the needs of this market. Mozambique has considerable market penetration in South Africa and Zimbabwe, with the purpose of travel being varied, but such visitors' spending power is less than that of international tourists.

In terms of the conceptual framework of this thesis, the core (i.e. South Africa) is found to be the most significant contributor in terms of tourist volume, but not value, to Mozambique. Ownership of tourism enterprises is also found to be mainly in the hands of entrepreneurs from the core, with less influence exerted by Mozambican nationals on the tourism private sector. As a result of being in such close proximity with the core, the development of domestic tourism in the periphery suffers and any potential income that would have been drawn from this activity is pulled to the core. This is not necessarily bad development because as the country's economy improves and Mozambican nationals become more involved in the national tourism industry, both as investors and consumers, they will already have an idea of how tourism is managed and consumed. This does, however, raise the question of whether the South African influence in the tourism industry is necessarily positive all round, and whether it allows for some customization so that Mozambican destinations are not simply a continuation of the South African self-drive, self-catering product. It further raises the concern that because Mozambique's domestic tourists are growing accustomed to a more developed product, they may not be willing to consume the under-developed domestic product? Mozambique's domestic tourism market has been identified by the core through leverage of the core's access to information, innovation and flexibility. The absence of a strategy on how to develop its domestic market reveals that Mozambique fits into the periphery's characteristic slowness to respond to and take advantage of emergent opportunities.

CHAPTER NINE: SOUTH AFRICA AS THE CORE OF SOUTHERN AFRICAN REGIONAL TOURISM

9.1 Introduction

This chapter presents the case of South Africa, the last of four case studies that comprise this thesis. The purpose of this chapter is to examine the extent to which South Africa's tourism policy and planning have recognized the regional tourism market. The chapter is presented in three sections. Section one presents a brief overview of the historical development of tourism in South Africa; section two presents the manner in which regional tourism has been recognized by the public and private sectors, while section three briefly summarizes South Africa's role as a source for regional tourists according to the evaluation matrix.

9.2 Overview of tourism development in South Africa

The foundations of the modern state of the Republic of South Africa were laid with the settlement of the Dutch in the Cape Colony in the 17th century, so that by the 19th century the country was marketed by private travel companies to European tourists as a tourism destination (Lubbe 2003). Increased demand for raw materials to rebuild Europe and Japan following the Second World War coupled with thriving industries led to a population with disposable income to spend on travel (Lubbe 2003). At the time, tourism in South Africa was largely a segregated affair focused upon white citizens who had greater freedom of movement and disposable income than other races as a result of the formalization of apartheid laws (Rogerson 2013b). Labor-related travel, particularly nationals of Mozambique and Malawi, moving to work in the mines of South Africa (Newitt 1996), laid the foundation for future VFR tourism. Southern African liberation struggles served to disrupt tourism development in the region between the 1960s and the late 1980s (Teye 1988). Though South African tourists could still safely visit Botswana, Namibia, Zimbabwe, Swaziland and Lesotho (Crush and Wellings 1983; Pirie 1992), the disruption encouraged the growth of domestic tourism within South Africa.

The economic sanctions leveled against Pretoria in the 1980s by the international community, led to a steady decline in tourism arrivals to South Africa (Saunders 2004). During this time, government viewed tourism as a purely social and recreational activity without significant economic development potential (DEAT 2004). As Ferrario (1988: 23) indicated, tourism was viewed as “a secondary economic activity, whose main function [wa]s to provide an additional flow of foreign currency to the country”. The decade of the 1990s began with the historic event of Nelson Mandela’s release from prison and the unbanning of political organizations. These acts marked the start of the transition from apartheid to democracy in South Africa and culminated in the country’s first democratic elections in 1994. Following Nelson Mandela’s release in 1990, tourism arrivals increased significantly between 1990 and 1994, leading to government recognizing the potential of the sector to create employment, alleviate poverty and catalyze the construction of infrastructure in rural communities (Republic of South Africa 1996).

9.2.1 Tourism development and attendant expectations

South Africa is popularly called 'the economic powerhouse of sub-Saharan Africa' and is estimated to contribute a quarter of Africa's total economic production (Warman 2009). It has a long history of mining and industrial development, and is further endowed with natural resources in the form of 2,800 km of coastline and marine resources, productive agricultural land, mountain and desert landscapes as well as wilderness and wildlife. The country has experienced positive social and economic change since 1990 when the era of apartheid-induced economic sanctions gave way to a democratic dispensation. These changes have catalyzed social and economic developments, both within the country and in the greater southern African region. Despite these developments, the country continues to be characterized by a significant wealth gap between its wealthy and poor citizens, described as 'the two economies'. The first economy is "advanced and sophisticated with infrastructure and competitive industries while the other is informal, marginalized and characterized by high levels of unemployment" (Beaumont 2004: 1).

With tourism's reliance on natural resources and its potential to utilize a large unskilled labor base, the sector shows promise in redistributing resources and alleviating poverty in rural and urban areas that need it most. It is a sector with the potential to earn foreign exchange, create employment, redistribute wealth among the two economies and encourage development in areas largely ignored during apartheid (Rogerson and Visser 2004). The desired outcome of tourism development was that tourism's benefits would be distributed beyond established private sector stakeholders and beyond traditional tourism destinations within the country (Republic of South Africa 1996). Tourism was and is expected to: *inter alia,* facilitate communities to meet their basic needs, have access to opportunities for the creation of new wealth, reverse discriminatory practices as well as democratize the society and the country (Republic of South Africa 1996).

9.2.2 Tourism product and geographical spread

South Africa's primary tourism product consists of two distinct products that cater to both the long-haul market (nature and animals, culture, history), and to the short-haul air market and land market (shopping and entertainment) (Saunders 2004). Secondary products may be seen as the second-home tourists and the time-share market (Visser 2006; Hoogendorn and Visser 2010, 2011; Pandy and Rogerson 2013). The country also has a thriving domestic tourism market. Geographically, tourist destinations, investments and products are clustered in the Western Cape, Gauteng and Durban (Rogerson 2013b). Most of the country's tourists pass through Gauteng Province which receives the greatest amount of spend from foreign tourists because Johannesburg, being a flight hub, serves as a stop-over for regional travelers en-route to other regional or international destinations. Other popular areas among international visitors are Mpumalanga (Kruger), the Cape Garden Route and the North West Province (Sun City). Gauteng, KwaZulu Natal and the Western Cape are popular among African visitors regardless of mode of travel, though for the land market, provinces bordering countries of origin get the highest number of visitors, from neighboring countries (SA Tourism 2005). Seventy percent of inbound tourists enter the country by road while, 26% enter by air transport (SA Tourism 2008). Over 90% of inbound tourists visit South Africa for holidays, while the remaining 10% visit for business, study, work and transit (SA Tourism 2008). South African Tourism's annual reports provide a detailed disaggregation of the holiday category into: VFR, leisure, shopping and business. Business travel is further divided into business (traveler) and business (tourist) with the former traveling strictly for business and the latter for conferences or company meetings (SAT 2005). The seasonal fluctuation of tourist traffic has been identified by SA Tourism as a threat to the development of sustainable tourism. This is because it discourages permanent and reliable employment and income flows (SAT 2008). The African market is seen to have the highest numbers of visitors, the peak of which is reached in December and lowest volumes in February and June.

9.3 Research findings

9.3.1 South Africa's inbound tourism statistics

Statistics South Africa (StatsSA) is the organization mandated to collect national statistics. As such, it produces monthly and annual reports on Tourism and Migration, including data on monthly arrivals of foreign travelers, their countries of residence, mode of travel and purpose of travel. More detailed information on provinces visited, money spent by foreign tourists, as well as other inbound tourist characteristics is provided by South African Tourism Board's (SA Tourism) monthly tourism exit surveys (SAT 2006). Other government departments also collecting tourism information include South Africa's Department of Tourism (formerly the Department of Environmental Affairs and Tourism until 2009), the Department of Trade and Industry along with each of the provincial tourism marketing organizations. Data and insights into South African tourism are also available from private research companies and researchers in South Africa's academic institutions. The data available show the prevailing trends in inbound tourists. Tourism data collected until the 1990s are not reliable, although it is known that the number of regional tourists increased significantly (Rogerson and Kiambo 2007). Among the reasons for data inaccuracy are errors of over- or under-reporting, largely caused by the region's history of labor mobility. Furthermore, at different points in time, the BLS countries (Botswana, Lesotho and Swaziland) and Namibia were considered part of South Africa and no formal immigration controls were in place for visitors from these countries prior to 1992 (StatsSA 2002). SA Tourism's data provide insight into tourist characteristics but are not necessarily comparable from one year to the next. This is because the organization has chosen to improve upon its quality of information collected annually, "trad[ing] off comparability for accuracy" (SAT 2003: 2).

Following Mandela's release from prison in 1990, the number of tourists entering South Africa increased significantly (Figure 9.1), owing to what was called the 'democracy dividend': an influx of travelers curious to experience the new South Africa (Singh 2004). Numbers increased from 804,985 in 1988 to 6.8 million in 2004 (SA Tourism 2008). The tourism arrivals have reached a plateau several times since 1990 due to global events, such as 9/11, that depressed travel appetite and fluctuations in South Africa's currency (SA Tourism 2005). Growth in tourism arrivals has been maintained by strategically hosting global events such as the Rugby World Cup among others (SA Tourism 2005).

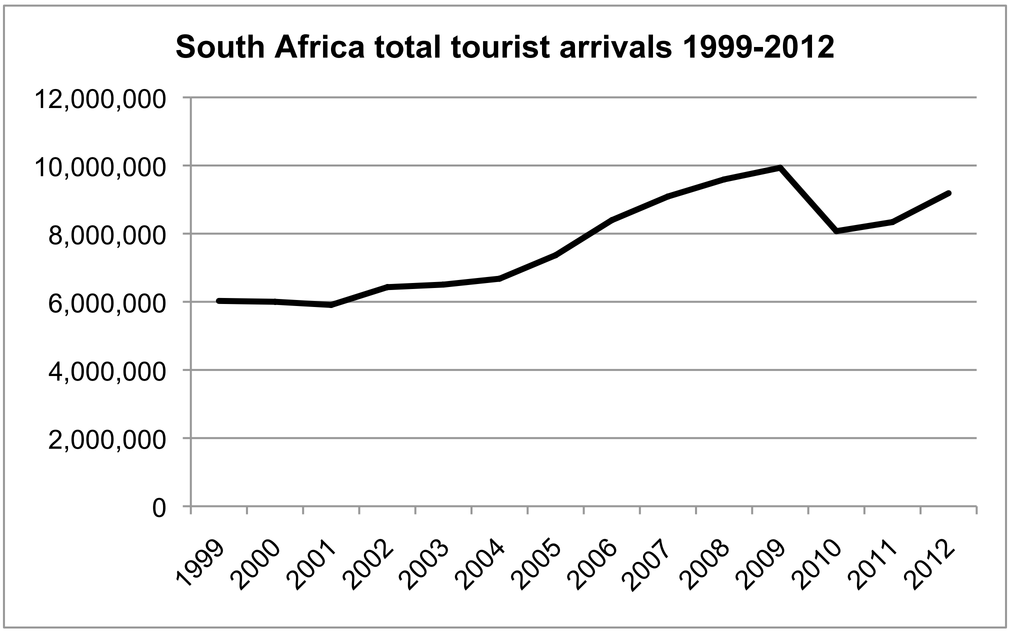

Figure 9.1: International arrivals to South Africa 1999 – 2012.

9.3.2 Recognition of regional tourism in the public and private sector

South Africa's tourism potential was recognized during the transition period when the 'democracy dividend' was experienced, leading to the creation of institutions and legislation to provide guidance on how this potential could be harnessed to benefit the nation. The process of creating a post-apartheid vision for tourism began with preparation of the White Paper on the Development and Promotion of Tourism Development (White Paper) in 1996. The tourism White Paper was the *de facto* tourism development policy in South Africa (Cornellissen 2005) – until the National Tourism Sector Strategy was published in 2011 – and it stated both the vision and priorities of tourism development for South Africa and outlined the structure of the tourism industry and its institutions. The vision of the White Paper was “to develop the tourism sector as a national priority in a sustainable and acceptable manner, so it “w[ould] contribute significantly to the improvement of the quality of life of every South African…[and] be a major force in the reconstruction and development efforts of the government” (White Paper 1996). It significantly emphasized that foreign investors should not be allowed to compete in businesses within the reach of South African citizens or community members. Finally, the White Paper identified tourism as an opportunity for economic development South Africa had missed harnessing. Though it made no mention of regional tourism, the White Paper outlined the framework for a new and effective national destination marketing organization and it was through this organization that regional tourism development was realized.

In the year 2000, the South African Tourism Board and the national destination marketing organization was restructured in conformity to the White Paper’s recommendations: to be independent of government bureaucracy and have more flexibility to respond timeously to changing global situations. These amendments allowed the newly restructured organization to have more opportunity and flexibility to raise funds independently of government funding (White Paper 1996). The restructured organization changed its acronym from SATOUR to South African Tourism (SA Tourism) in recognition of the need to distance itself from SATOUR’s legacy of being in “associat[ion] with the old South Africa and the old privileged tourism” (Republic of South Africa 1996: 13). Its headquarters also moved from Pretoria to Johannesburg, reflecting a change in affinity: from government towards private sector (Singh 2004). SA Tourism's management then made the strategically significant decision to move South African tourism development from the path followed by other African countries, focusing exclusively on the international market.

Prior to 2000, tourism marketing carried out by SATOUR focused on European markets and wealthy tourists (Monitor group 2001). The watershed decision made by SA Tourism was that *identification of markets to target would be informed by market research and analysis and not by traditional and arbitrary views* (my emphasis) as had been the case during SATOUR's tenure (SAT 2003d). An additional change made by the restructured organization in its marketing approach was to replace the practice of packaging and selling what were thought to be the country's strongest tourism offerings: wilderness, wildlife & culture and heritage. This practice was overcome by first determining the products and experiences sought by prospective tourism markets and then developing the desired products within the country, which thereby effectively attracted and stimulated an existing market (SAT 2003d).

In order to support SA Tourism's new data-driven market selection model, the Strategic Research Unit (SRU) was created (2002) within the organization and charged with the collection, analysis and dissemination of tourism data (SAT 2003d). The organization found there was little market research that had been undertaken regarding African countries as sources of outbound tourists and whatever had been done was jealously guarded by those who had done the research (Leshoai 2006). In a break from this practice of not sharing data, SA Tourism chose to share the SRU's findings with tourism stakeholder groups by publishing it on the internet. This openness was expected to help the tourism trade (tour operators, travel agents, hotels, transporters, etc) at both the domestic and the regional levels to build their understanding and capacity for market research and how to translate the shared data into an economic gain for themselves (Monitor Group and SAT 2001). The moment SA Tourism chose to develop a data-driven tourism strategy it had to acknowledge the high volume and low value of regional tourists. Furthermore it had to determine whether to ignore these numbers – as was happening in neighboring countries – or to find a way to harness them. The private sector, for its part, has shown recognition of regional tourism in a number of ways, including working with SA Tourism in the creation of deal-driven packages, and specializing in service for the regional market as in the case of The Don Suite.

Further illustrations of South Africa's commitment to regional tourism growth are provided by the support given to the industry through leaders in government and the broader private sector who have stated the need, "…to be cautious about dismissing particularly our African source markets. The sheer volume of arrivals from these markets ensures that their overall contributions to revenue are important" (SAT 2002: 10). Additional support for intra-African tourism development came from a CEO of SA Tourism, Moeketsi Mosola, who stated: "There is no doubt that Africa continues to be the backbone of tourism receipts, both in terms of arrivals and value, and we will continually strive to grow our market share in the region" (SAT 2005). Finally, the National Tourism Sector Strategy (Republic of South Africa 2011) identifies the African market as key to South Africa's tourism development and plans to set up five marketing offices on the continent by 2020.

9.3.3 Ownership and investment in tourism industry

Investment in tourism was affected by apartheid in two key ways: property and products in tourism were exclusively in white hands, and due to the economic sanctions, the powerful players in the industry were not foreign, but South African. Therefore, unlike in the other three countries where we observed ownership of tourism enterprises being dominated by foreign capital, in South Africa the industry is characterized as 'lily-white' (Rogerson 2004b). Foreign investors have some involvement in the South African tourism industry, as tour operators investing in accommodation, luxury camps and shopping malls (Houston 2004; Rivett-Carnac 2005). A large part of accommodation is dominated by local brands such as Sun International, Protea and Southern Sun, among others (Rogerson 2012; 2013a). The South African individual investor in accommodation has increased both the number of beds available in tourist hubs through the provision of bed & breakfast, guesthouse and backpacker facilities (Mwendwa 2004). Individual investors have also been able to expand out of the country and dominate neighboring countries' tourism industries.

9.3.4 Development of domestic and regional tourism

As mentioned earlier in this chapter, though domestic tourism has a long history in South Africa, it was boosted by the economic sanctions and liberation wars in southern Africa. This segment of the tourist market is considered to still hold untapped value for the national economy because a large proportion of South Africans still take part only in discretionary travel (Rivett-Carnac 2009). SA Tourism launched the *Sho't Left* campaign in 2005 (revising it to *Vaya Mzansi*, which targeted all South Africans and not just though previously disadvantaged, in 2012) with the objective:

> *To create a travel culture in a people previously not allowed to travel in their own country. White South Africans have a history of leisure travel whereas Black South Africans only did VFR, had access to very limited facilities, such as the Durban beachfront and traveled to very specific parts of cities for specific purposes (Leshoai 2006).*

In an illustration of how government intervention can be significant to ensuring effective implementation of a tourism strategy, SA Tourism was able to (a) reach out to established private sector operators such as Thompson's Travel, hotel chains and other established lodges to leverage their travel networks to package holidays that were accessible to the target domestic market, and (b) influence what they funded - the affordable domestic trips in this case - so they could insist that 40% of the procured product was awarded to Black Businesses. They were also able to prevail upon the established firms to bring on board black-owned businesses in the hope that there would be enough skill and capacity built to allow for the emergence of a new set of black tourism entrepreneurs in four to five years (Leshoai 2006).

9.3.5 Evolution of regional tourism

Where a cogent planning and marketing strategy is concerned, the foregoing case study countries have exclusively focused on attracting the international tourism development and have not invested as much in planning for the regional market because "*they will come anyway*" (Kariuki 2005). The argument is made that the international tourism market is higher yielding than the low spending regional markets and there are no quantitative studies showing conclusively the value of the regional market (Lucas 2009; Mbaakanyi 2009; Momade 2009). These DMOs aver that marketing resources available are too limited to justify spending on studies of a market whose value is questionable. It is in these two areas: expenditure on market studies and belief that even low value markets merit planning attention that South Africa distinguishes itself and consolidates its advantages as a core capable of flexibility, with rapid flow of knowledge and information.

The strategic decision made by South African Tourism research and strategies regarding regional tourism development have challenged these views. Within southern Africa, particularly in countries that share a border with it, South Africa has high market penetration, that is, people will still visit the country, irrespective of whether or not SA Tourism advertises there. As expressed by a tourism private sector stakeholder:

> *Penetration levels are very high so they have something like 90-98% market share of the people traveling out of SADC countries. It's a waste of money to try and attract the remaining 2% of the population. Specifically with respect to neighboring markets, promote what they can do while they're here. Try and get them to stay longer, and to build holiday elements into their stay ... in West Africa and East Africa, South Africa doesn't have the same penetration levels ... Nigerians and Kenyans who are traveling go to Europe for shopping and visiting friends and relatives. [SA Tourism] Can try to penetrate a little bit more there (Saunders 2004).*

In fact, the Sho't Left domestic tourism strategy in 2008 was expanded to target the young and upcoming segments of neighboring countries, Mozambique and Botswana specifically, because they were undertaking non-discretionary travel (trade and shopping) to South Africa in large numbers; elements of leisure tourism could be "upsold" to them as part of their stay in South Africa (Appel 2008). South Africa's view towards regional tourism development is best summed up in the quote: "We have thus fundamentally moved away from deriving strategy from opinion and anecdote and towards answering two key questions with data and deep analysis: Behind which customers do we organize ourselves to win? How do we target these customers?" (SA Tourism 2002: 4).

Interviews with SA Tourism Africa & Middle East Portfolio Manager, Tumaini Leshoai (2005 to 2007), provided insight into the choices made concerning African market selection as well as the rationale behind these choices. South Africa Tourism has for the past ten years (2003 to 2013) not had a marketing office based in any African country:

> *SA Tourism is committed to ensuring that operational costs don't exceed a certain percentage of the total budget… Africa is operationally dollar-based and when currencies fluctuate, the figure you had budgeted to run the office may increase tremendously in the course of the financial year. That is why we shut down the Zimbabwe marketing office two years ago … it became too expensive to operate [due to Zimbabwe's economic sanctions]. All marketing that targets Africa and the Middle East is run out of this building [SA Tourism headquarters in Sandton]. We also roll out a Fundi programme [a program that teaches what tourism product South Africa has to offer] to different missions (Leshoai 2005).*

South Africa Tourism identified two core African markets (Nigeria and Kenya) and core SADC markets (Botswana, Lesotho, Swaziland and Mozambique). The way in which these markets were identified was through research,

...[we] go in and filter and determine who has a positive disposition towards South Africa, who can afford to travel, who is exposed, well-traveled, what kind of experiences are sought in a South African travel experience? We segment the market according to age, income, experience... Direct airlift into a country also determines how hard we push our product, issues of accessibility such as visas too... If there is no direct link or there is constrained access to a country, then we will not push our product there (Leshoai 2006).

SA Tourism's marketing approach for the two core African countries, Kenya and Nigeria, was different. For Kenya, the campaign was deal-driven and focused upon urban events, persuading Kenyans to travel for short holidays and festivals that market research indicated would be interested in. Packages were promoted during the Cape Town International Music Festival and the Standard Bank Joy of Jazz week in Johannesburg. There were also packages centered on shopping, wine-tasting and golf. Though travelers were free to visit at any time of the year, these packages were usually made available during South Africa's low season as a strategy to reduce seasonality. They advertised to the market segment using the most direct channels: the major travel agents, promotional events and travel fairs at key up-market shopping areas, and media releases in newspapers and on television to create awareness of packages available. The approach to the Nigerian market was different. Nigerians were found to be more interested in status, luxury and upmarket experiences, so SA Tourism had to determine how to compete with destinations conferring this status upon a traveler from this market (including the

USA and the UK) (Leshoai 2007). The strategy adopted here was to market desirable upmarket products through travel agencies, taking care not to create an appetite for travel to South Africa that could not readily satisfy. To create demand ahead of supply would be damaging to SA Tourism’s long-term strategy. This is because prospective travelers could have been stimulated to travel to South Africa by advertising but might be frustrated by the lack of airplane seats to visit the desired destination. In such a scenario, the potential Nigerian tourist might transfer that interest to more accessible competing destinations (Leshoai 2007).

The Tourism Growth Strategy states that the strategy for the SADC market, which contributes the largest volume of tourist flow, is to defend South Africa’s market share while cross- and up-selling in order to extract more value from these visitor volumes (Monitor Group and SAT 2001). For the neighboring markets of Botswana and Mozambique, the decision was made to encourage them to spend more or stay longer in South Africa (Leshoai 2006). For the important outbound markets in Africa, SA Tourism’s strategy is to defend their market share because it is under constant threat. Greater aspirational value is attached to overseas travel countries than to African travel. Furthermore, destinations like Dubai are more accessible to these markets than South Africa is, particularly with respect to visa regulations, flight schedules, cost, and variety of products. There is also the question of dignity where potential travelers feel they are being victimized or being harassed by the procedures they have to follow to get a tourist visa for South Africa:

One thing that is killing regional tourism is visa regulations. For a family of five for example, a visa takes 10 days to process. The South African consulate wants you to produce medical aid certificates, your bank statements, and pay a fee for each application. If the package to which you were responding was R4,200 for 2 nights in Cape Town, you will have paid an equivalent amount trying to get to Cape Town. It is too much of a hassle for some people… Ghanaians and Nigerians are the largest group of potential regional tourists, but their treatment in many African countries (look at visa regulations of these countries' citizens and their negative experiences in South Africa) causes them to be determined not to visit any other African countries and instead spend their money in Europe or America (Mwendwa 2004).

The comments of Mwendwa (2004) introduce the issue of effectiveness of the SA Tourism strategy. It is laudable that the DMO has recognized the value of regional tourists and created a product that speaks to their needs. However, are the travel trade (private sector) and other departments that affect tourism, in this case the immigration department, brought on board to share this recognition of value? It is clear that from the perspective of the department of immigration and home affairs, their mandate causes them to view Africans from certain countries suspiciously and therefore warrants close scrutiny in the award of visitor visas.

9.4 South Africa as a destination

9.4.1 Views of the tourism trade

Interviews with travel trade stakeholders in South Africa indicated it might not be enough for there to be recognition by government when the private sector does not have a positive attitude towards the regional market. The large volumes of regional tourists have been dismissed by the private sector as having no value because they are simply cross-border traders or people entering South Africa to shop. It is therefore not correct, from the perspective of the travel trade, to call them tourists (Frost 2011). Furthermore, as highlighted in the Mozambican case study, the travel trade here feels the African market is difficult and uncooperative and therefore prefers to continue catering to the seasoned international market:

> *Local tourists are very fussy. They're ignorant, not well-traveled and not exposed and therefore constantly fussy and troublesome and ceaselessly complaining. E.g. guests staying at top of the range hotels generally take care of themselves because they're experienced travelers, those staying in less lush accommodation can't stop complaining. The lower budget you go, the more volume you get, and also the more complaints (Kariuki 2004).*

Further opinions concerning the view of the private sector on the development of regional tourism continue to point out the role of an organized effort which initially sets up the guidelines of how to treat (in terms of price and packaging) the regional tourist:

> *In tourism, you need someone to organize it - the regional tourism - and due to lack of capital to set up the business, you first look at what will bring you money as fast as possible. ... banks won't loan you money for tourism because it is intangible (would rather fund the hotel structure or apartments). In the end, you don't have money to start up the business, so you will go into a partnership with someone (usually a foreigner) who has the capital and you have the know-how; the last thing your partner (and maybe even you) wants is Africans who generally want cheap packages and want to negotiate to the last cent, [especially because] you are already operating on very low margins. Also, because it [regional tourism] isn't well established, tour operator has to spend a lot of time and money to find places with special prices, find a way of discounting from rack rate. There is nothing across the board that provides guidelines on how much to discount rack rate (by what percentage) for a regional traveler vs. for an overseas tourist (overseas tourists are in fact better off because they have it already packaged for them so that they end up having someone negotiate lower price for them, than you as an African would pay - no one negotiating for you) (Mwendwa 2004).*

Further private sector opinions indicated the interests of the regional market do not lend themselves to supporting SMEs in the tourism industry because:

> *"Most of the people want to do Monte Casino … so SMEs won't really be touched by the African market in this way. They [regional market] might help by buying trips to township tours, African cultural villages, but again, the African market isn't interested in that... Casino, nightclubs, entertainment, that's what people want [however]… we don't understand these markets enough (Saunders 2004).*

South Africa conforms to the expectations of a core country, which its that it manages to pull/attract surplus money or resources (in this case, the under-valued domestic tourists) from the periphery to the core. Normally, in the classic core-periphery relationship, it is the wealthy citizens from the periphery who are attracted to the core. This happens in the case of all African countries where this wealthy market travels to London, Paris and New York. However, due to the proximity of the South African core (to the southern African periphery), together with its marketing efforts, it has been able to attract both this wealthy market (through weekend and short getaways, shopping), and a less affluent but still significant would-be domestic tourist market which is ignored in its own country.

As the core, South Africa is able to show greater speed and flexibility in responding to findings from its market research. This is notable where it is able to respond to the would-be domestic tourists coming from countries where the cost of accommodation is too high for the domestic tourist market and is pegged to the US dollar. South Africa's marketing to these tourists makes accommodation more affordable through Sho't Left packages and also cater to the needs of those self-drive tourists who prefer to work on their own timetable. Furthermore, whereas the periphery continues to rely on traditional marketing methods (journalist visits to the destination, magazines, travel agents), South African Tourism goes beyond these methods. They have done extensive market research and have differentiated their markets and are careful about the kind of channels to use so they do not create demand that cannot be fulfilled.

9.5 Conclusion

This chapter strongly supports the case of South Africa as the core to the southern African periphery, particularly in tourism. South Africa is a significant source of outbound tourists to neighboring SADC countries and further afield on the African continent. With respect to the three preceding countries that have been studied, South Africa annually contributes the highest volume of inbound visitors to them all. South African investment capital dominates the tourism sectors of the other three case study countries, further serving to highlight its core status. The argument made in this chapter is that the strategic decision made in 2002 by the South African Tourism Board to identify tourist source markets, based upon up-to-date market research (data-driven), and not simply on long-held beliefs about the many source markets (anecdote), has made a significant difference to the nature of tourism in South Africa, and has had far-reaching influence, especially on how neighboring SADC countries structure their tourism strategies.

CHAPTER TEN: CONCLUSION AND RECOMMENDATIONS

10.1 Introduction

This final chapter presents, in four sections, the findings of the research undertaken and its contribution to the body of tourism knowledge. The first section presents a summary of the research findings, the second section presents the way in which South Africa's position as a tourism core has been established and how that has contributed to the body of knowledge. Section three presents the findings and contributions of the thesis with respect to non-Western tourism. Finally, the fourth and final section presents recommendations of areas for further research. The term non-Western tourism is used here to refer to the group of regional travelers that does not include the white South African traveler. This is because this South African traveler primarily consumes the wilderness and wildlife product developed for the international market.

10.2 Summary of research findings

The research undertaken for this thesis was essentially exploratory in nature as it sought to understand if and how the regional tourist had been recognized by the public and private sector. This was an interesting question to ask because the southern African region has traditionally focused on marketing to the overseas/long-haul tourist market. The main findings of the thesis are:

10.2.1 The existence of a viable regional market in southern Africa

There is a viable regional tourist market in southern Africa. It consists of the traditional outbound South African market, and increasingly the potential domestic tourists of the three peripheral countries. The viability of this market has been shown by South Africa Tourism's data collection and its development of data-driven strategies around how to retain the southern African market and harness it for South Africa's domestic economic development.

10.2.2 Presence of a neighboring core counts

Having a core country within the region is both a blessing and a challenge to the peripheral countries. This core pulls tourists of various earning brackets (not just the wealthy bracket as is the case in a distant core) and their disposable income away from the periphery to the core. This does, however, teach residents of the peripheral countries how to consume tourism and prepares them to consume domestic tourism. However, development of domestic tourism within the peripheral countries, due to the dominance of foreign investors (in this case mainly from the core) does not cater to the tastes or budgets of locals. These factors make the pull of the core as a tourism destination even stronger.

10.2.3 Market failure has occurred in the development of regional tourism

Whereas the expectation of government's neoliberal position on tourism being government led and private sector-driven, was that wherever there is demand, it will be fulfilled by the private sector, this has not been the case. As shown in this thesis, there is demand for regional tourism in all four case study countries. However, due to the preference of the private sector for the more familiar overseas market, the regional market has not been addressed, except in the case of South Africa. Indeed, as was made clear by a member of the travel trade, the reality of how package travel is organized within the private sector does not fit well with the needs of regional tourists. This market failure or absence of private sector support for a regional tourism market that has the means to motive for travel makes a case for state intervention to ignite and sustain both domestic and regional tourist flows within the region. The development of this type of tourism is expected to be beneficial to both small businesses within the tourism economy and to social development of the southern African population. South Africa has already ignited domestic and regional travel in a way that works for its context (Sho't Left and data-driven targeting of regional and African markets) and these models deserve emulation and adaptation within the peripheral countries.

10.2.4 Slow response of the public sector to changes and opportunities

There is a lag or sluggishness of the public sector in responding to changes on the ground. This was evident in the case of Zambia Tourism where the ZTB office, based in a key regional source market, was cognizant of changes taking place and of emerging opportunities and new markets to target. South Africa Tourism has addressed this public sector tendency towards sluggishness by building periodic reviews of strategy into their annual planning process.

10.3 The role of South Africa as a core

South Africa is the most significant source of outbound tourists for southern Africa. These tourists are mainly seasoned white South Africans who are both self-drive and fly-in tourists. These self-drive tourists are controversial in terms of their value to host countries given that most of them drive in with all the consumable produce they will need during their stay. These tourists therefore cause typical leakage expected of core-periphery relationships where revenue is lost to the host country due to importation of tourism products from the core.

South Africa's potential for producing even more outbound tourists is great because of the market segment called the "black diamonds". These are South Africans who were previously not accustomed to leisure travel and are learning now how to consume outbound leisure travel. They are curious about neighboring countries and have enough money to afford travel that addresses their needs. They have made friends with other Africans who visit or live in South Africa and are therefore primed for continental travel. They are, however, reticent due to fear of disease (especially malaria), crime and political tensions, and they definitely do not want to encounter the Africa shown in the media as a continent overwhelmed by poverty, disease and suffering.

South Africa has a significant influence on tourism industry development within the southern African region. First, because South Africans make up the majority of owners in the tourism industry of the three peripheral countries studied. Secondly, because through their demonstration effect as both tourists and owners of tourism establishments, South Africans set the tone for what local investors (and local tourists) conceptualize as tourism. An example is how the local industries in the periphery have picked up on the self-catering aspects of South African tourism establishments both to cater to the many South African clients traveling there, and also to cater to clients of local and other nationalities who consume tourism there.

Finally, SA Tourism has been a major positive influence on the region. First, because of their embrace of advantages borne of being the core: leveraging the acquisition of knowledge and information, networking with and learning from different tourism destinations, basing strategy on data and presence of opportunity and not yielding only to traditional or 'conventional wisdom' views. They have used this core advantage to harness the regional market and in so doing, increase tourism-related revenue inflows to the South African economy. Second, their openness in sharing some market research data on the internet has influenced the manner in which peripheral countries plan their own strategies. An example is how Mozambique can plan how to be an excursion destination and draw upon both international and regional tourists visiting South Africa, thus reducing some of its marketing costs. Third, the physical presence, within the core, of their tourism marketing office has been extremely useful for Zambia tourism marketing because it has not only facilitated marketing to the South African core market, but has provided key information about and insights into other regional markets and allowed the inexpensive marketing to these markets.

One significant insight provided by the position of South Africa as a core in southern Africa is an issue that was raised repeatedly in the course of interviewing stakeholders for this research was that of attitudes towards domestic and regional tourists. These attitudes may be considered misunderstandings at their mildest, or outright discrimination at their worst. In the peripheral countries, discrimination was raised as an issue that discouraged domestic tourism. Those who had money to travel within their own country were discouraged by stories in the media about how accommodation establishments discriminated against local people. In Mozambique and Zambia especially, there were stories of tourism establishment staff turning away local tourists. Similar experiences of discrimination have been reported in countries such as Zimbabwe and Kenya, countries outside the scope of this study, which is useful in indicating that the culprit in this case is not entirely South Africa's apartheid past, but rather the long-term pursuit of the African tourism industry of the overseas or international tourist and long-term disregard of non-Western tourists.

The work of Erisman (1983) on cultural dependency provides some insight into how the development of regional tourism in southern Africa and Africa in general is being retarded and discouraged by long-term effects and influence of the focus on international or Western tourism. Erisman (1983: 358) explains that "servility theorists claim that by continually playing host/servant to white vacationers, the black West Indian consciously or unconsciously comes to adopt or at least acquiesce to this racially discriminatory scenario which relegates non-whites to an inferior position…" It is important to do research that provides an understanding of the extent to which the negative attitude towards regional tourists is the result of inexperience (on both the part of the tourism establishment and the domestic tourists) or of racism. This information would be helpful to the ongoing efforts to diversify tourism products and increasing the positive economic impacts of tourism on local economies.

The tourism literature is replete with studies of core-periphery relationships based on a metropole (or core) and periphery distant from one another, or in the case of Caribbean islands, one island that is wealthier and dominant over the other. Indeed, the case of South Africa falls into the broader framework of the ways in which cores and peripheries interact. South Africa is dominant particularly in economic terms. However, the flow of tourists is not one-way. This is a significant difference which is caused both by the close proximity (to the periphery) of the core, the economic dominance of the core (the three peripheral countries import most of their basic products and food and drink from South Africa), and the choice this core has made to recognize and harness the inflows from the periphery because they have a positive economic impact on the core.

This research, particularly due to casting South Africa as its foil, has been useful in exposing the most important of the factors presented in the evaluation matrix in Chapter Three, at least in the case of the southern African periphery: that “the periphery is passive, it receives (does not create) instructions and strategies from the core and has little influence in determining direction of planning. Lack of capital means it is only able to provide the most basic services with respect to accommodation and restaurants, due to low skill level”.

10.4 Non-Western tourism

This thesis has been able to provide information on a fledgling body of knowledge about non-Western tourism in southern Africa and the challenges and advantages it faces in its development. It has been shown that, like the Chinese tourists presented by Chan (2006), tourists from the periphery, and some from the core, are more interested in traveling towards a product more modern than is available in their country. This type of modern product is considered a rest from everyday life, and for those with families, it allows the children to experience first-hand, a product they had previously only seen on DSTV (television).

This research suggests the non-Western tourist is not interested in the well-developed natural wilderness and wildlife product offered in the region. This is not interesting for this market because they have already experienced the rural countryside and its empty expanse and now wish to experience crowded modernity. Furthermore they already have available at a discounted rate, wildlife viewing in their own countries. The view of the tourist as automatically being a northerner is the standard view in both the core and the peripheral countries. This is evident in the periphery where the best developed products are oriented towards the northern market, and little if any attention is paid to what interests the non-Western market. Though it is also oriented towards the northern market, South Africa's case is exceptional because it has recognized non-Western tourists and has either created products that cater to the market, or facilitated inbound travel of this market. The travel needs of the non-Western tourist have been clearly understood and therefore South African Tourism's approach is to package less products and offer more flexibility and self-drive opportunities. As a result of the constant changing factors in their lives, non-Western tourists who travel to South Africa prefer flexibility on the dates of their travel, preferring not to be locked into a specific itinerary.

10.5 Areas for further research and recommendations

Areas in which further research would be valuable include:

Characteristics of the regional tourist: Among the interesting questions raised in the course of this study, but beyond its scope, was the issue of what characterizes a regional tourist, how do they travel and with whom, and what do they want to experience? SA Tourism's market reports offered some insight, as did members of the travel trade. However, the picture of the regional traveler remains unclear. Members of the travel trade who were interviewed preferred to describe regional travelers according to what they were not and not what they were: the regional tourist does not book travel or accommodation in advance, does not respect deadlines or itineraries, and doesn't want to pay the standard amount for a package. Furthermore, the trade presented the prospect of serving regional tourists as a loss of revenue and a difficult experience for them. This is clearly an issue that requires further research because the manner in which the travel trade is currently structured is to address the needs of the Western tourist. As desirable as the notion of South Africa being in a position to assist would-have-been domestic tourists from the periphery on how to consume tourism might be, it would be an error to think that the regional market will simply fall in line with the structure used for Western tourists.

The hegemonic effect of South Africa on the region's tourism: Section 10.3 presented the significant influence South Africa as a core has had on tourism industries in the periphery. This effect warrants further investigation to determine the extent of both its positive aspects and the negative effects it has, which necessarily lead to smothering the local initiative to develop a product that reflects authenticity and uniqueness of each country.

Citizen discounts: This thesis started out to understand whether there was a discounted price offered for citizens of a country taking part in tourism. Though asked during interviews with the stakeholders, this question did not yield definitive responses. This was because due to the poor development of domestic tourism in the peripheral countries, the stakeholders were unaware of consistent special treatment accorded the few who undertook domestic travel. The one area identified where citizens received a discount, regardless of whether in the core or periphery, was in park entry fees. Zimbabwe was mentioned as a country that offered special tourism discounts to its citizens but it was outside the scope of this study. Given that one of the factors discouraging domestic travel was identified as high prices of accommodation and access to tourism products, further research into the pricing and discounting of products to catalyze domestic travel would be helpful to the development of regional tourism in southern Africa.

10.6 Conclusion

In conclusion, therefore, this thesis confirmed one of the theoretical propositions and found that there has indeed been an increase in the number of intra-regional tourists due to increasing wealth, improved transport and tourism infrastructure and relaxing border formalities. This increase has not, however, been harnessed by countries in the periphery. The core, South Africa, has provided an outstanding model of how to harness this market for economic growth. It is unclear whether this model will work for the peripheral countries given that their product is primarily wilderness and wildlife. This provides the space and motivation for the development of an urban tourism product that speaks to the regional market which has both wilderness and wildlife at home, and which prefers to see developed structures and shopping.

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