

# Spatial trends in tourism within South Africa: The expected and the surprising

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# Structure of the presentation

- **Background**
- **Problem**
- **Aim**
- **Data, analysis and results**
- **Conclusion**

# Background

- The World Tourism Organization (WTO) defines tourism as the activities associated with travel away from a person's usual place or environment (WTO, 2000)
- Tourism is a service industry with the product being consumed at the point of production

# Background cont...

- Given the tourist industry's structure in terms of a mixture of large enterprises and many SMMEs that draw upon domestic and international visitors, and its components of natural and manmade attractions, tourism is complex, cross-sectoral and highly dynamic.

# Background cont...

- The tourism sector is highly distinctive in that it is not a sector that is formally classified as such in terms of the International Standard Industrial Classifications (Hatzichronoglou 1997).
- There is often considerable uncertainty concerning the precise boundaries of the tourism economy and of how to measure its economic impact on employment creation or contribution to national GDP
  - “in national accounts ‘tourism’ does not appear as a formal industry classification; its sub-categories, such as hotels and transport, are found within ‘real estate’, or aggregated under ‘transport, communications and storage’” (Christie *et al.* (2013: 43)).

# Background cont...

- One tool for measuring tourism is the “Tourism Satellite Account (TSA)” which in South Africa has been developed by Statistics South Africa to offer certain estimates of the direct contribution of tourism to GDP and employment creation

# The problem

- Several researchers have highlighted the spatial imbalances of the tourism sector in South Africa (Rogerson *et al.* 2004; Visser 2007; Visser *et al.* 2012)
- It is highly concentrated spatially in terms of its distribution and in relation to its potential local impacts across the country
- Tourism was most adversely affected of all the sectors of South Africa's economy by the apartheid programs.

# Aim

The aim of this paper is to provide an indication of the value of geographically comparative analyses of the impact and spatial trends of the tourism sector in local economies in South Africa between 2001 and 2012.



# The Underlying Analysis



## REGIONAL POTENTIAL FOR SIGNIFICANT JOB CREATION IN THE TOURISM JOB DRIVER OVER THE SHORT TO MEDIUM TERM

- Van Huysteen, E., Maritz, J., McKelly D., Oranje M., Jordaan A., Rogerson C. 2014. **RESOURCE DOCUMENT: TOWARDS SPATIAL PERSPECTIVES IN SUPPORT OF THE NGP**. Viewed: June 2017, <[http://stepsa.org/pdf/projects/edd\\_tools/Draft%20Resource%20Document%20Spatial%20Perspectives%20NGP%20v3.pdf](http://stepsa.org/pdf/projects/edd_tools/Draft%20Resource%20Document%20Spatial%20Perspectives%20NGP%20v3.pdf)>.

# The Underlying Analysis cont....

- The analyses are based on a database which is derived from IHS Global Insight as part of its Regional eXplorer (IHS 2014).
- It is a consolidated platform of integrated databases that provides statistics down to a local municipal level.

# The Underlying Analysis cont....

In understanding the multi-dimensional nature of the tourism space economy the discussion will unfold through four sections of material. These will relate to the following:

- The spatial patterns of tourism trips and bednights as a whole.
- Differentiation of the geographical distribution of tourism trips and bednights by origin of tourist, whether domestic or international.
- The spatial patterns of trips by purpose of trip and differentiated into four sub-categories, namely leisure, business, visiting friends and relatives (VFR) and other.
- The geography of total tourism spend and the contribution of tourism to local economies.

# Study Results and Discussion

The Spatial Patterns of Tourism Trips and Bednights as a Whole.

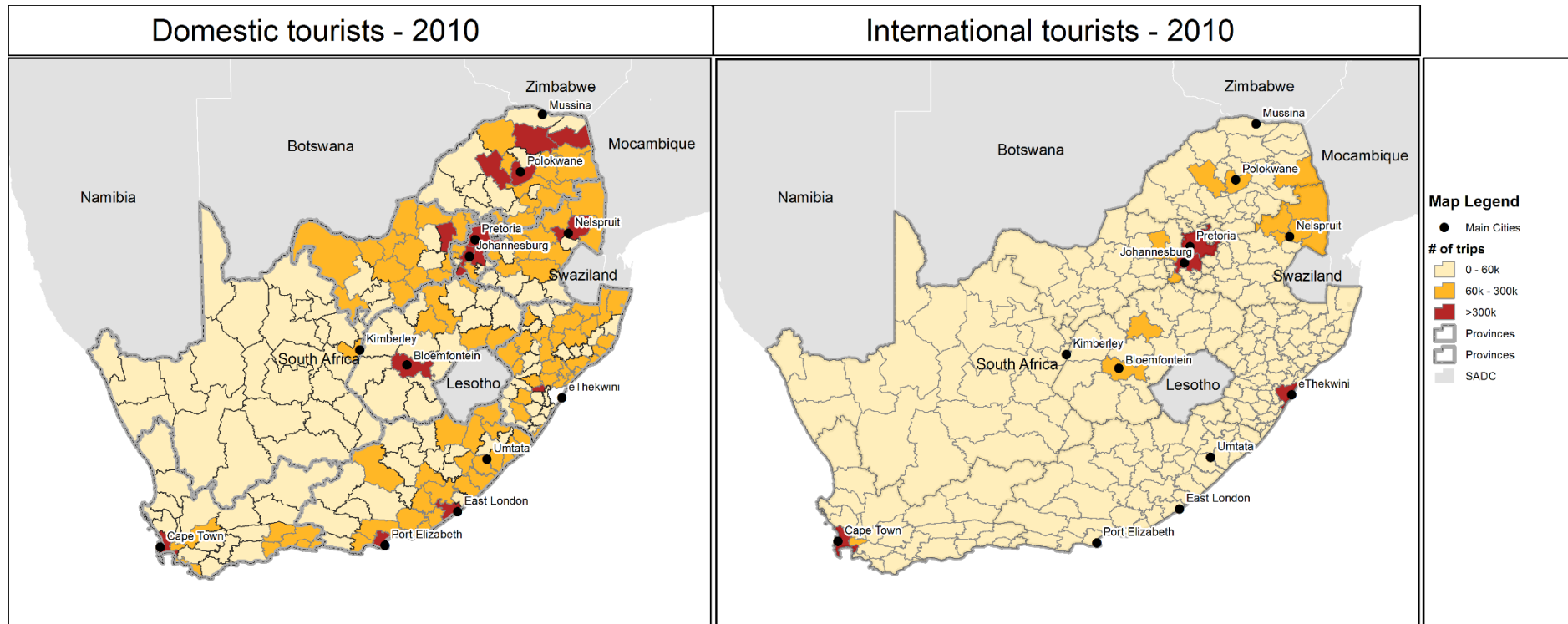
# Study Results and Discussion

## The Spatial Patterns of Tourism Trips and Bednights as a Whole.

Ten Leading Destinations: All Tourist Trips and Bednights 2010			
Trips		Bednights	
Destinations	Share (%)	Destinations	Share (%)
Johannesburg	8.34	Johannesburg	8.61
eThekweni	7.90	Cape Town	8.31
Tshwane	5.67	eThekweni	8.00
Cape Town	5.58	Tshwane	5.96
Ekurhuleni	4.56	Ekurhuleni	4.61
Ehlanzeni	4.52	Eden	3.41
Nkangala	3.17	Ehlanzeni	3.39
Mopani	2.86	Nelson Mandela Bay	2.41
Capricorn	2.80	Nkangala	2.32
Vhembe	2.57	Cape Winelands	2.30
	<b>47.97</b>		<b>49.32</b>

# Domestic and International tourists - 2010

## Differentiation of the Geographical Distribution of Tourism Trips by “Origin of Tourist” (Domestic or International)



# Domestic and International tourists - 2010

Ten leading (local) destinations for both Domestic and International Tourist, 2010.

Domestic Tourist Destinations				International Tourist Destinations			
Trips		Bednights		Trips		Bednights	
Destination	(%)	Destination	(%)	Destination	(%)	Destination	(%)
eThekwini	8.85	eThekwini	9.53	Johannesburg	15.28	Johannesburg	14.67
Johannesburg	6.59	Johannesburg	6.10	Tshwane	11.06	Cape Town	13.86
Cape Town	5.20	Cape Town	6.01	Cape Town	7.10	Tshwane	10.56
Tshwane	4.32	Tshwane	4.05	Ekurhuleni	7.08	Ekurhuleni	6.95
Ehlanzeni	3.99	Ekurheleni	3.64	Ehlanzeni	6.62	Eden	6.05
Ekurhuleni	3.93	Ehlanzeni	3.27	eThekwini	4.12	eThekwini	4.30
Nkangala	3.18	Nelson Mandela Bay	2.98	West Rand	3.21	Cape Winelands	4.08
Capricorn	2.91	Buffalo City	2.70	Nkangala	3.11	Ehlanzeni	3.66
Mopani	2.89	OR Tambo	2.64	Eden	3.08	West Rand	3.11
Vhembe	2.80	Nkangala	2.58	Mopani	2.75	Overberg	2.35
	<b>44.66</b>		<b>43.50</b>		<b>63.41</b>		<b>69.59</b>

# Types of tourism

Different types of tourism can be identified, namely:

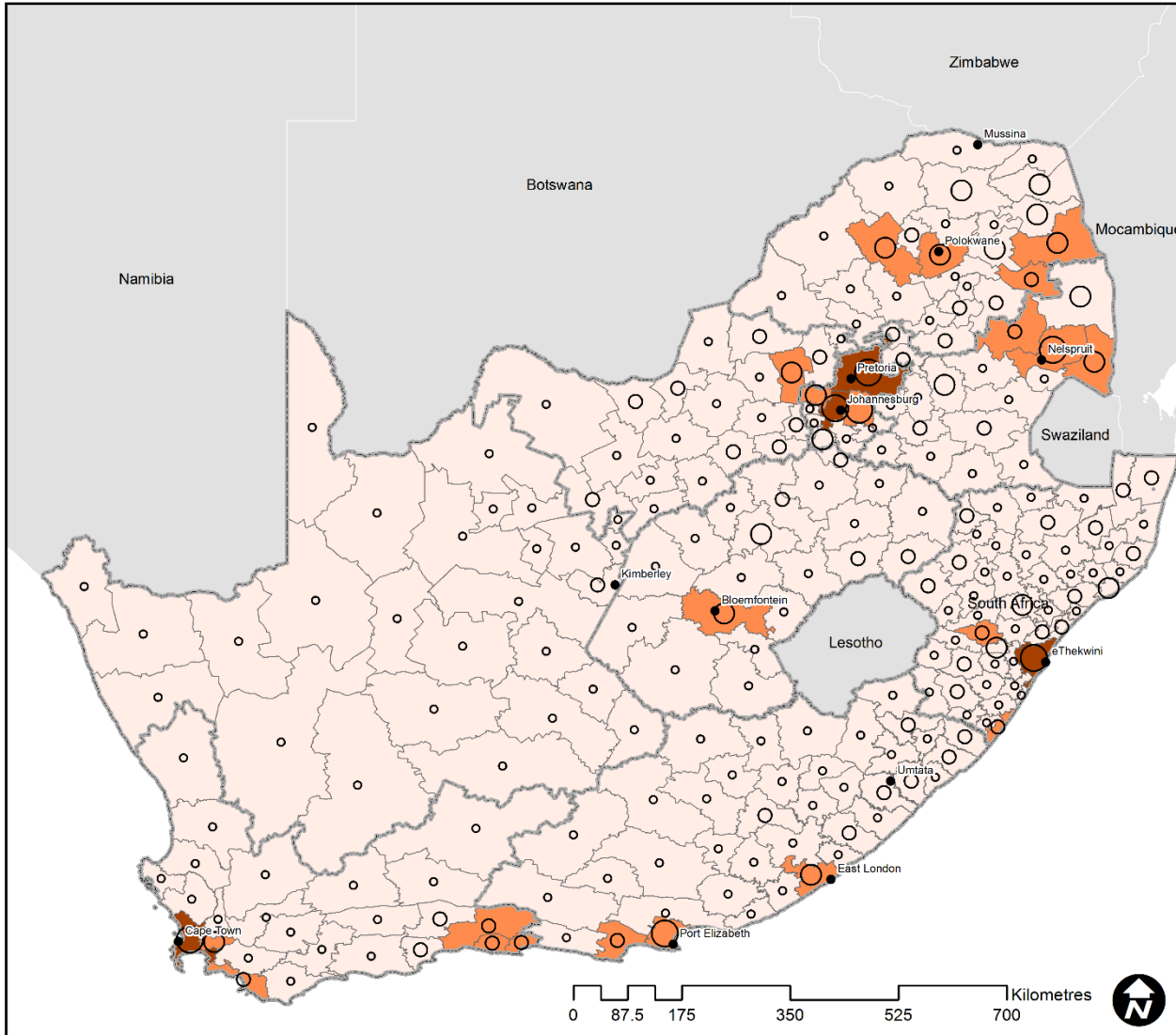
- **leisure & holiday and**
- **business tourism**

and then also other categories that are less known but with seemingly high impact and potential in more rural economies, namely:

- **friends and family visits and**
- **other purpose related visits (such as government service, as well as religious and medical visits).**



# Leisure & holiday



## Map Legend

- Main Cities

## Number of Trips by Purpose of trip:

### Total - 2010

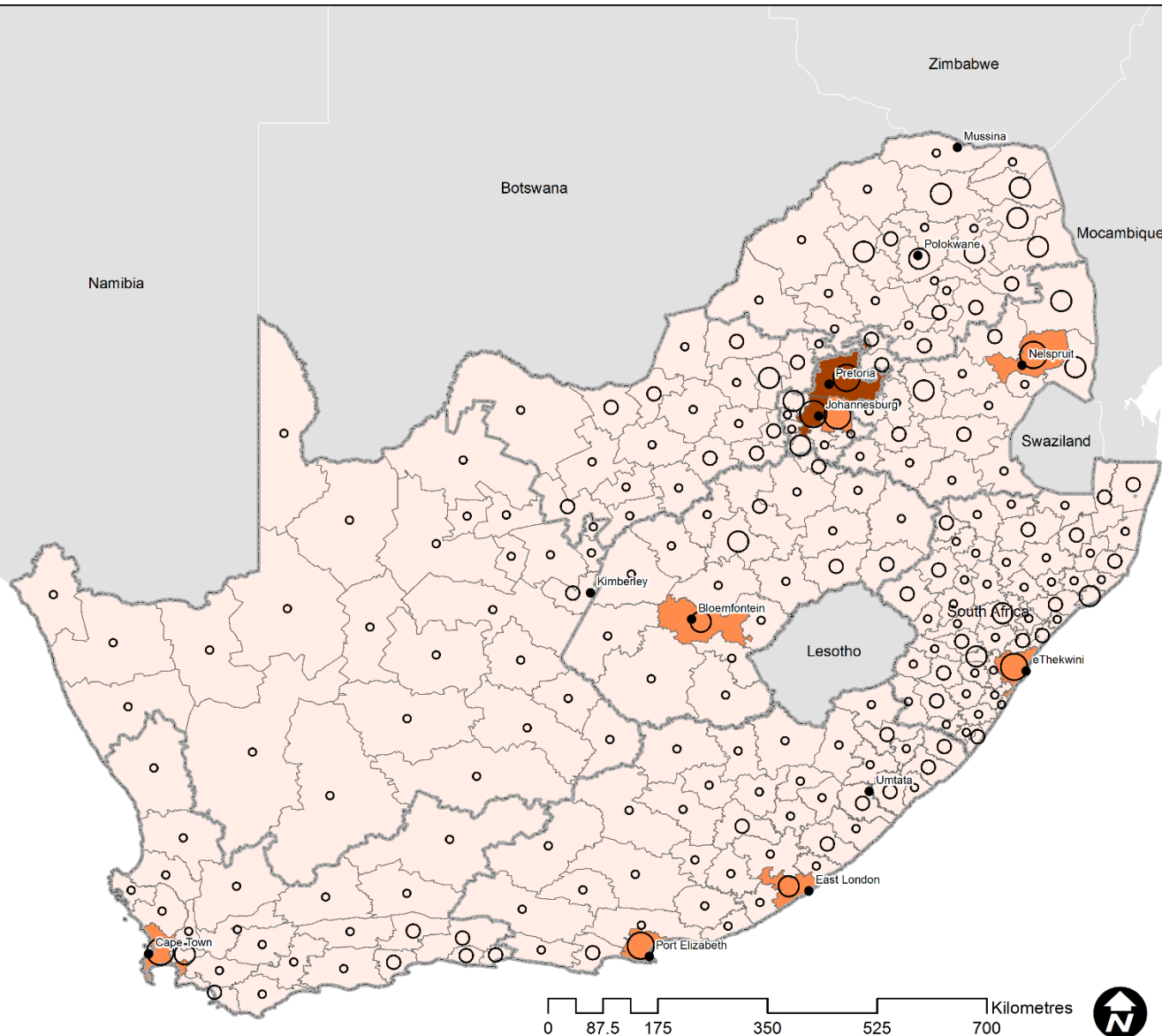
- 3573 - 100000
- 100001 - 250000
- 250001 - 750000
- 750001 - 3116101

### Leisure / Holiday - 2010

- 318 - 60000
- 60001 - 300000
- 300001 - 859920
- Provinces
- SADC

Leisure	
Destination	% share
City of Cape Town	11.47
City of Johannesburg	10.30
City of Tshwane	7.98
Ehlanzeni	6.67
eThekweni	6.53
Eden	5.12
Ekurhuleni	4.45
Cape Winelands	3.42
Cacadu	3.15
Waterberg	2.83
Mopani	2.38
West Rand	2.31
Mangaung	2.22
Bojanala	2.07

# Business



## Map Legend

● Main Cities

## Number of Trips by Purpose of trip:

### Total - 2010

- 3573 - 100000
- 100001 - 250000
- 250001 - 750000
- 750001 - 3116101

### Business - 2010

- 116 - 60000
- 60001 - 300000
- 300001 - 639494

□ Provinces

■ SADC

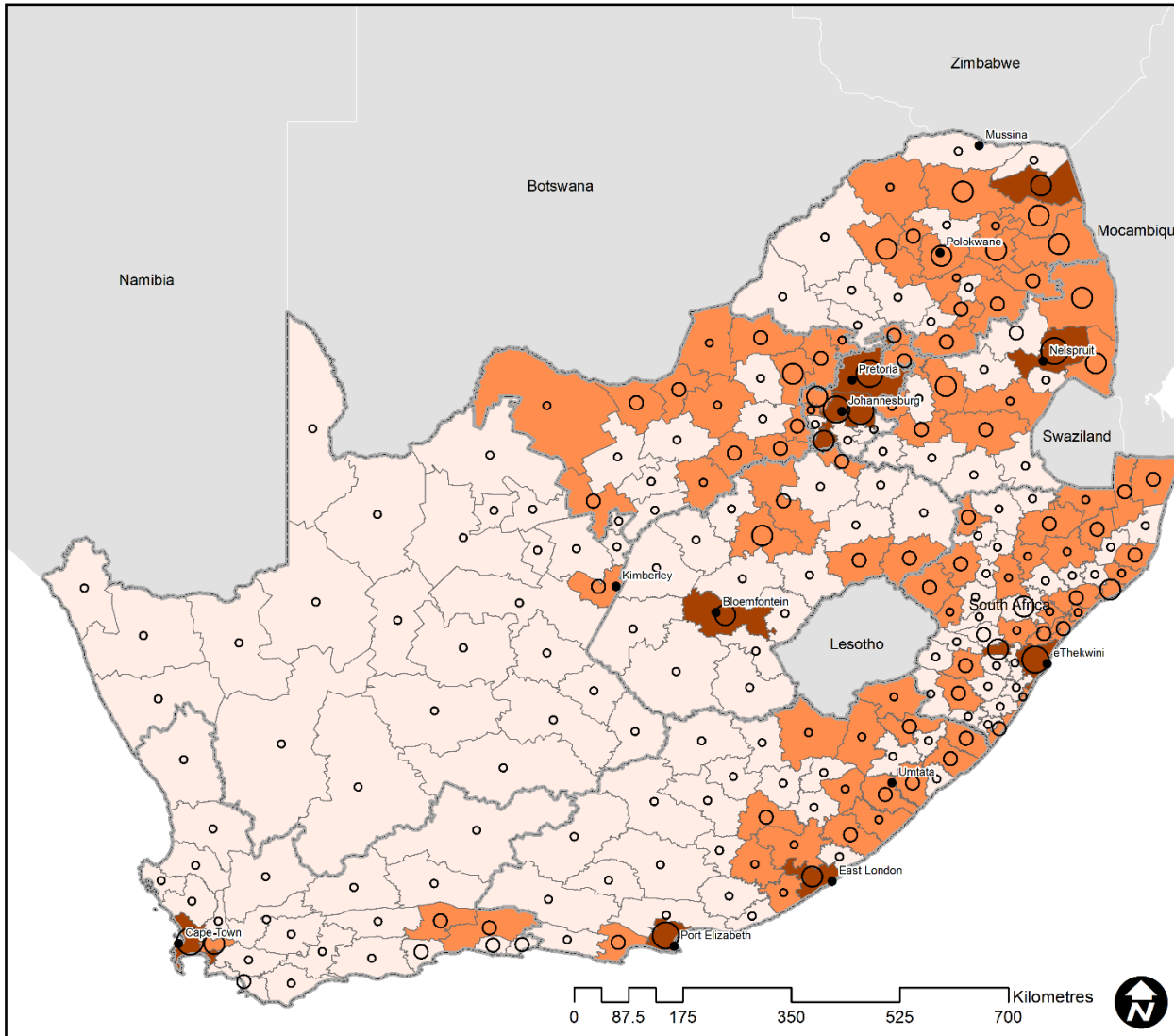
## Business

Destination	% share
City of Johannesburg	17.96
City of Tshwane	12.95
Ekurhuleni	7.12
City of Cape Town	6.80
eThekweni	6.44
Ehlanzeni	4.48
Eden	2.72
Bojanala	2.14
West Rand	2.11
Cape Winelands	2.05
Mangaung	2.01
Gert Sibande	1.96
Capricorn	1.91
Nelson Mandela Bay	1.73

0 87.5 175 350 525 700 Kilometres



# Visiting friends and relatives



## Map Legend

● Main Cities

## Number of Trips by Purpose of trip:

Total - 2010

- 3573 - 100000
- 100001 - 250000
- 250001 - 750000
- 750001 - 3116101

## Friends and relatives - 2010

- 1504 - 60000
- 60001 - 300000
- 300001 - 2022770

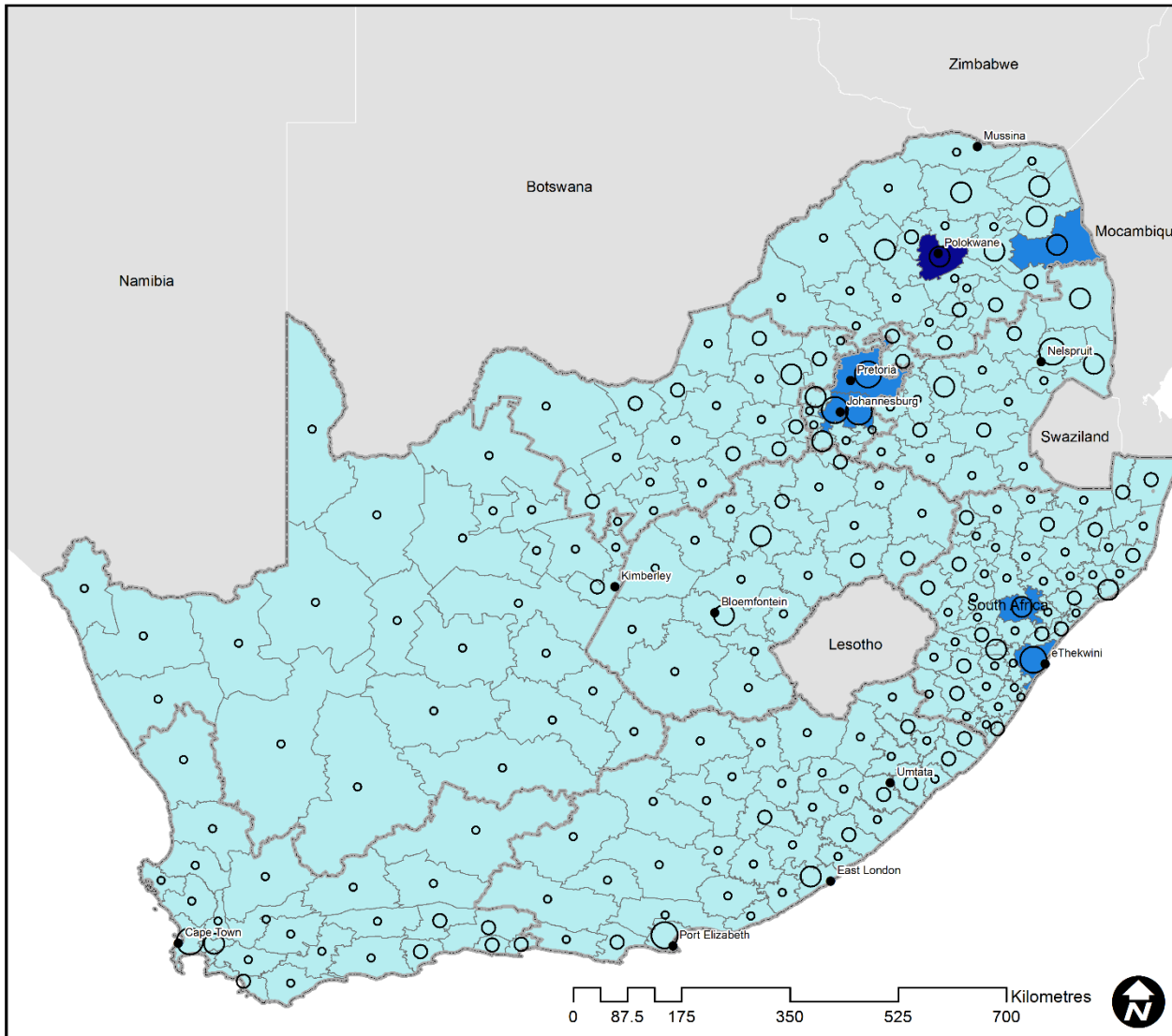
▭ Provinces

■ SADC

## Visiting Friends and Relatives

Destination	% share
eThekweni	8.74
City of Johannesburg	6.66
Ekurhuleni	4.65
City of Tshwane	4.40
Ehlanzeni	4.34
City of Cape Town	3.62
Vhembe	3.45
Nkangala	3.07
Mopani	3.06
Bojanala	2.51
UMgungundlovu	2.41
Capricorn	2.36
Uthungulu	2.31
O.R.Tambo	1.96

# Other (religious, medical, ...)



## Map Legend

- Main Cities

## Number of Trips by Purpose of trip:

### Total - 2010

- 3573 - 100000
- 100001 - 250000
- 250001 - 750000
- 750001 - 3116101

### Other (Religious, Medical, etc) - 2010

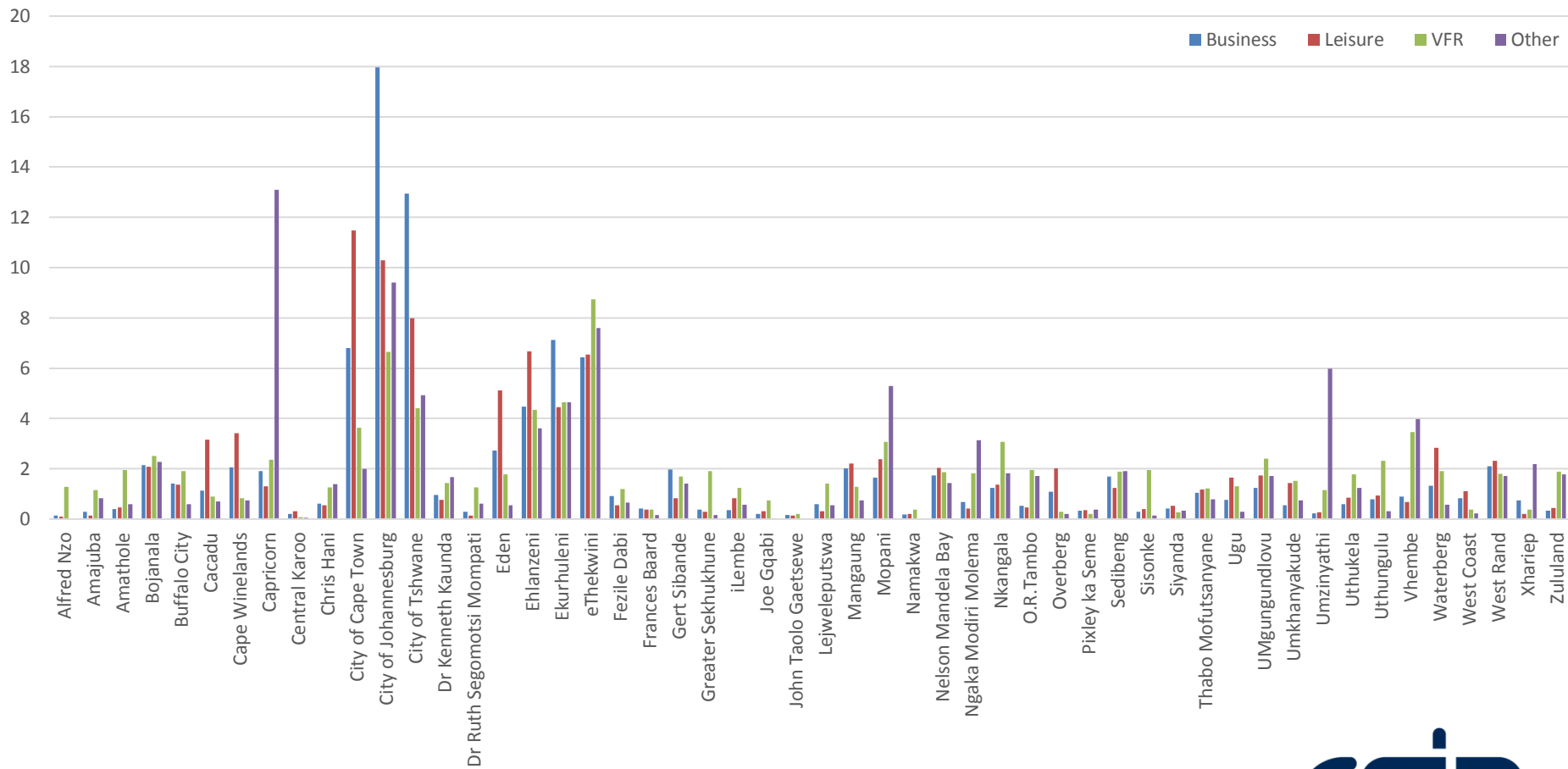
- 0 - 60000
- 60001 - 300000
- 300001 - 300732

- Provinces

- SADC

Other	
Destination	% share
Capricorn	13.10
City of Johannesburg	9.40
eThekweni	7.61
Umzinyathi	5.99
Mopani	5.28
City of Tshwane	4.93
Ekurhuleni	4.65
Vhembe	3.98
Ehlanzeni	3.61
Ngaka Modiri Molema	3.13
Bojanala	2.27
Xhariep	2.18
City of Cape Town	1.99
Sedibeng	1.92

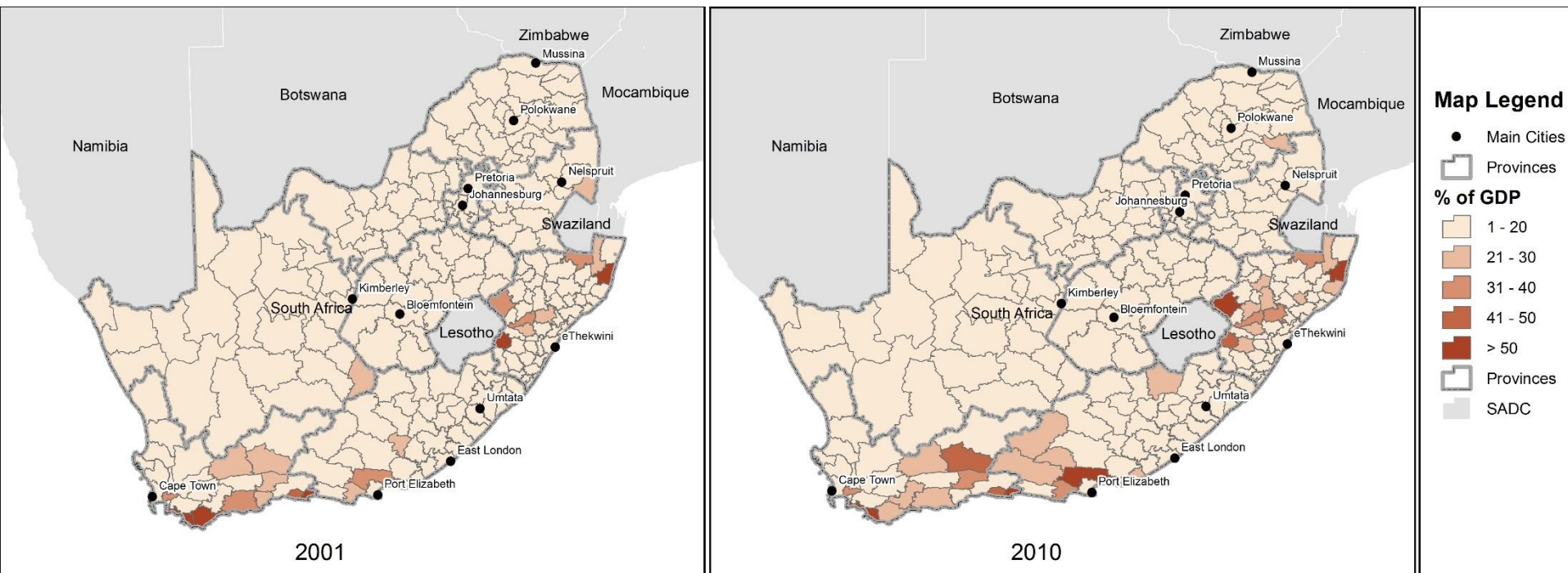
# Trips by “purpose of trip”





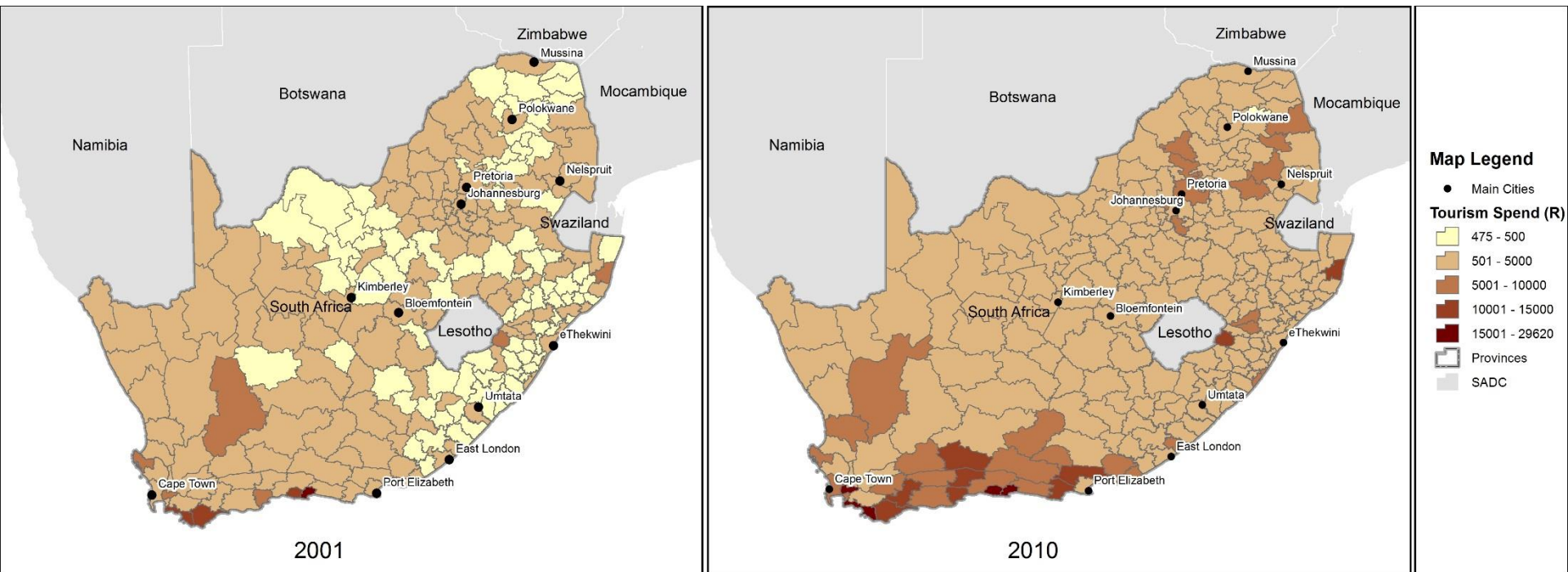
# Tourism as % of GDP

- Tourism Spend as a Percentage of Local Gross Domestic Product



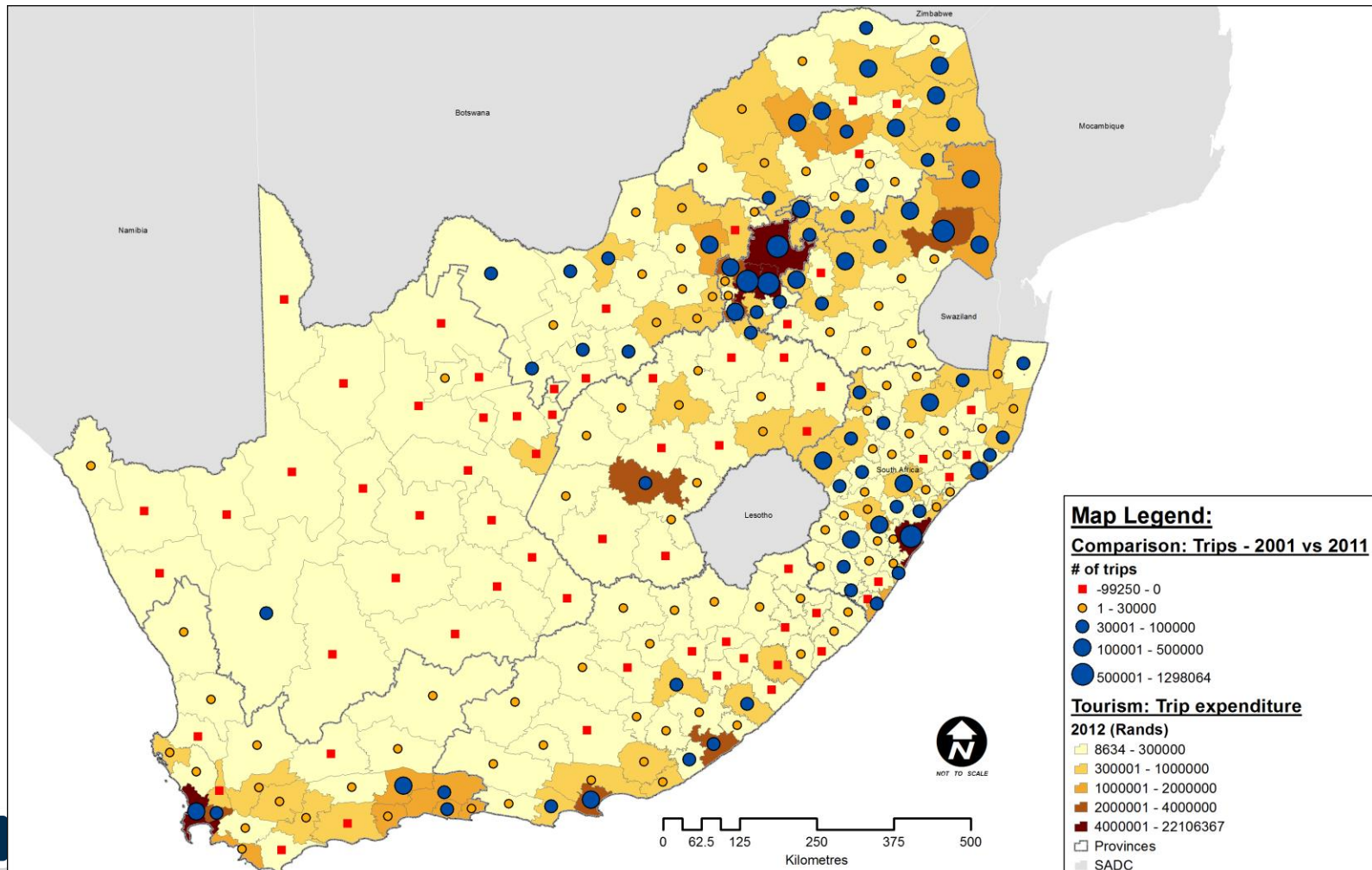
# Tourism Spend

- Average Tourism Spend per Capita



# Trip expenditure

- Trip expenditure and comparison of total trips: 2001 vs 2011





# Conclusion

- The analyses of domestic and international tourism trips and spending illustrate the significant role of metropolitan areas, secondary and coastal cities, and typical tourism destinations in the tourism space economy.
- The top five business destinations accounted for a 49% share of all business trips for 2010.
- High degree of concentration in business tourism in Gauteng, followed by Cape Town and eThekweni
- Highlighted the significant and different spatial pattern of trips generated through the “visiting to friends and relatives” trips across the South African landscape.
- The significant role of tourism in areas that are not necessarily seen as top tourism destinations is also illustrated.
- Highlighted the impacts and significance of tourism in a range of rural regions and many secondary and small towns across South Africa

# Thank you

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