South Africa calling cultural tourists

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Abstract

Although cultural tourism is the most prevalent type of tourism in the world it still remains invisible in South Africa’s tourism landscape. Despite the country’s unique cultural heritage resource base and the fact that cultural diversity is the core feature of South African marketing strategy, absence of culture as a purpose for travel in the South African Tourism international exit survey means that the size of cultural tourism market as well as behaviour characteristics of cultural tourists are not known to both government and industry. For this reason the main tourism stakeholders in the country are unable to make informed strategic and developmental decisions which directly affect the performance of South African cultural heritage tourism products. This paper contributes to South African cultural tourism discourse both theoretically and practically. It presents a theoretical overview of the complex nature of cultural tourism demand, specifically cultural motivation and omnivorousness of cultural consumption. These theoretical concepts are applied on the data from South African annual tourism reports, and European and USA tourism reports and research studies, in order to determine the size and behaviour characteristics of the main international cultural tourism markets in South Africa.

Keywords: Cultural tourism, cultural tourists, cultural heritage, South Africa, European and USA cultural markets.

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Introduction

Ample evidence exists in support of cultural tourism as the most prevalent type of tourism in the world (van der Ark & Richards, 2006:1408). In the past decade, cultural tourism increased by an estimated 15% annually (UNWTO, 2004) accounting for 40% (OECD, 2009:21) of the total world arrivals in 2007. The Association for Tourism and Leisure Education (ATLAS) comprehensive research findings based on the 42,000 worldwide surveys collected from 1991-2008, revealed that the proportion of visitors who indicated ‘cultural holiday’ as the purpose of visit increased from 17% in 1997 to 37% in 2008 (ATLAS, 2009:98), which corroborate the OECD findings. This phenomenal growth of cultural tourism is attributed to the rise of the experience economy (Pine & Gilmore, 1999) which subsequently changed the nature of tourism demand from escapism to enrichment (McCain & Ray, 2003:714). In the context of the
experience economy the authenticity and uniqueness of cultural heritage attractions became important guarantors of enriching and differentiated tourist experiences (Pernecky & Jamal, 2010:1060; Waitt, 2000:838). Consequently, the consumption of cultural heritage strongly emerged as the new area of tourism demand (Richards, 1996) driving current phenomenal growth of cultural tourism worldwide (Chen & Chen, 2010; Yale, 1991:21). The ATLAS comprehensive findings also corroborate this trend with museums rated ‘the most important’ tourist attractions by 51% destinations’ visitors worldwide regardless of the purpose for travel, followed by the historical sites 41%, and monuments 29% (ATLAS, 2009:98). Not only that cultural heritage sector attracted new tourists as part of new (cultural) tourism, but it serves as a differentiating factor of destination’s image and competitiveness (Saayman & Du Plessis, 2003:58), and the main theme in destination marketing.

While more than 50% of tourist activities in Europe are driven by cultural heritage (Europa Nostra, 2006:15), cultural tourism in South Africa has been invisible to both the South African government and tourism industry (NDT, 2010:5). Its potential remained under-realized (NDT, 2010:8) for almost two decades. When the new National Culture and Heritage Tourism Strategy (NCHTS) was revealed in December 2011 (NDT, 2011a) it was expected to unlock the economic potential of cultural and heritage resources for both rural and urban development. The main deployment approaches for the former are job creation (Massyn & Koch, 2004) and poverty alleviation (Ndlovu & Rogerson, 2004), while for the latter are Local Economic Development (LED) and urban regeneration (Rogerson, 2002; Rogerson & Visser, 2005; Rogerson, 2009).

Despite a continuous government acknowledgement that cultural tourism can secure the competitiveness of the South Africa tourism economy, there is no mention in the final NCHTS (NDT, 2012) of developments of iconic routes, township tourism, cultural villages and urban tourism all of which comprise the most visited classes of cultural heritage attractions in South Africa. Furthermore, the strategic backing for the new NCHTS remains unexpectedly limited. Even though the medium term Strategic Plan 2011/2012-2015/2016 of the National Department of Tourism (NDT) has identified “the development of niche products such as cultural heritage tourism as a priority” (NDT, 2011c:6), the National Tourism Sector Strategy (NTSS) failed to address the development of cultural tourism in any of its objectives. The only reference to cultural tourism in the final NTSS is under 2.2(ii) ‘niche product development and rural tourism’ identifying a strategic gap as “poor quality, management and maintenance of cultural heritage attractions” (NDT, 2011b:22).

Another problem for implementation and monitoring the NCHTS is absence of culture as a purpose of visit in the South African Tourism’s (SAT) international visitors’ exit questionnaire. The absence of cultural purpose for the visit means
there is no measurement of the volume and value of cultural tourism in South Africa. More importantly, lack of statistical data on cultural travel to South Africa prevents any segmentation of the main source markets based on culture as the main motivation for travel to South Africa and thwarts any comparison with current international cultural tourism trends. Moreover, the fact that South Africa has new NCHTS but no data to facilitate any measurements of cultural tourism demand in the country means that strategic decisions and any corrective measures regarding future strategic goals will not be informed by national statistical data.

Evidence of weaknesses which underpin new NCHTS go against the South African’s government own recommendation that “an industry that is innovative is one that is characterised by businesses, institutions and organisations that are informed, sophisticated in their outlook and constantly investing to upgrade their performance against their consumer’s every changing needs and choices” (SAT, 2008b:37). In order to upgrade the country’s performance against changing consumers’ needs one must first and foremost know who these consumers are so as to know what their needs and choices are. Generally, cultural tourists are the most prevalent and the most desirable market segment in the world’s tourism: They are highly educated with higher than average educational level (70% hold higher degrees, 20% masters or doctorates), they are also the highest spenders (spend 30% more than an average tourist), and represent young emerging market (40% are younger than 30 years) (ATLAS, 2004:2; Richards, 2007:15). Since the main motivation for cultural tourists is learning and novel experiences arising from the unique and authentic qualities of cultural heritage, they are also classified as serious leisure tourists (Stebbins, 1996).

Despite marketing South Africa globally as a cultural tourism destination, neither South African Tourism (SAT) responsible for marketing the country internationally nor the National Department of Tourism (NDT) responsible for developing and implementing NCHTS are aware of how many of these sought after tourists are actually responding to SAT calls. South Africa is calling cultural tourists but it seems that the question nobody is currently capable of answering is: Are they coming? This paper represents a contribution to South African cultural tourism discourse as it provides an answer to this decisive question, at least to some extent. The specific aim of the paper is to offer a theoretical framework which will inform a selection of particular national and international data on cultural motivation and behaviour characteristics of South African main source markets. In particular, the paper will present an estimate of the market share of South African international European and USA cultural tourism in general and genuine cultural tourists in particular. It will also give an overview of the behaviour characteristics of genuine cultural tourists which is of vital importance in securing future success of cultural heritage tourism development in South Africa.
This paper involves the analysis of two sets of sources. A theoretical framework for the study is derived from the secondary sources which cross-examine the main theoretical concepts underpinning cultural tourism motivation and consumption of cultural heritage. The second set of sources draws on existing South African national tourism data, strategies and reports, the US national statistics and European Commission’s and Gallup’s research reports. All the data is cross referenced in such a manner so the South African genuine cultural tourism market from Europe and United States could be estimated.

The paper is structured in two sections. The first section provides a theoretical overview of the complexities of cultural motivation and a resultant general typology of cultural tourists. It further provides an insight into the changing nature of cultural tourism demand which affects the character of cultural consumption in a destination. These theoretical concepts are applied in the selection of tourism statistical data presented in the second section. The selection of European and USA tourists is justified by the fact that these two segments represent the main international leisure markets for South African tourism and at the same time are recognised as the main growth markets for cultural tourism worldwide.

The curious case of cultural motivation

In tourism the relationship between needs, motivations, types of consumed products and the resultant tourist experiences is understood to be straightforward, casual and well defined (Leiper, 1990:383). The same relationships in cultural heritage tourism proved to be dissonant and in many instances non-correlational (Richards, 2002:1054). Since cultural heritage consumption does not coincide with the purpose of tourism travel, any tourist with any type of motivation can become a consumer of cultural heritage products offered at a destination (Poria, Reichel & Biran, 2006:163). It is the only tourism product which can be consumed without a ‘presence’ of a cultural tourist (Ivanovic, 2008). As motivation for consumption of culture and heritage can vary significantly to include anything from learning to entertainment, reliance on cultural motivation proved to be a very poor predictor of tourists’ actual consumption of a destination’s culture and heritage (McKercher & du Cross, 2002:144-147, 2003:46) and even less of an indicator of the nature of such a consumption (Goulding, 2000:268). Realisation that any tourist with any type of motivation can consume cultural heritage available in a destination rendered the centrality of cultural motivation an insufficient criterion in distinguishing between the main types of cultural tourists (McKercher, 2002; McKercher & du Cros, 2002, 2003); thus an inclusion of the depth of experience is sought as the second dimension. By incorporating both dimensions, McKercher and du Cros (2002) proposed a typology of cultural tourists consisting of five types: deep cultural experience is characteristic of **purposeful** (strong motivation) and **serendipitous** (no
motivation) cultural tourists, while shallow experience is typical of **sightseeing** (strong motivation), **incidental** (moderate motivation), and **casual** (low/no motivation) cultural tourists.

Because of the complex nature of cultural tourist typology a distinction between **genuine** and **accidental** cultural tourists (Richards, 2003) will be applied throughout this paper. While for the former culture represents the main reason for travel to a destination, the latter consumes cultural heritage sites as part of an overall destination’s experience. As delineation between culturally and non-culturally motivated travel is currently the only available tool in separating genuine from accidental cultural tourists’ consumption, the importance of an inclusion of cultural motivation in SAT exit survey is therefore of utmost importance. In theory, even this simple categorisation proved problematic for two reasons: firstly, even among genuine cultural tourists a degree of motivation varies “from those who have only a passing interest in local culture, to those driven by their specific interests to seek out a particular destination” (Richards, 2002:1052); secondly, a differentiation between culturally and non-culturally motivated tourists is weakened by the emerging evidence of the omnivore nature of cultural tourists’ consumption.

Cultural tourists tend to consume a whole range of different classes of attractions available in a destination ranging from entertainment, nature-based activities, sightseeing, learning at cultural heritage sites, to participation in high cultural activities such as art and classical music. This particular behaviour characteristic of serious leisure tourists is called **omnivorouseness** and is identified in ATLAS data as a general trend evident in many destinations worldwide. Richards (2011:11) observed that the consumption of cultural heritage attractions at destinations worldwide increased more rapidly than the increase in culturally motivated travel. Lohman and Mundt’s (2002:220) study of the behavioural characteristics of German cultural tourists have shown that of 30.1% of tourists attending cultural festivals only 20.2% considered themselves as cultural tourists. With an increase in cultural capital the cultural tourists are becoming more omnivorous (Toivonen, 2006:39; Richards, 2011:22) as they tend to visit many different classes of attractions especially to combine cultural heritage, art and natural attractions. As an example, Richards and Wilson (2007) identified the interactive travellers (IT) in the creative tourism programme in New Zealand as **cultural omnivores** as they equally participated in natural, cultural, and social activities. Using the ATLAS data, Richards and Palmer (2010:325-326) compared the proportion of cultural omnivores in the consumption preferences between heritage, arts and festival tourists. Festival tourists had the highest proportion of cultural omnivores as they spread their consumption across heritage, art and cultural events, unlike the other two types who concentrate on either heritage or art. As an example, while 100% of heritage tourists visited museums, 0% visited the art galleries. Similarly, while 100% of arts tourists
visited art galleries, they had 0% visitation to traditional festivals. On the contrary, festival tourists did not have 0% visitation to any cultural attraction; 29% visited museums and 25% art galleries (Richards & Palmer, 2010:326). Consequently, visiting specific attractions “cannot be used as a proxy for the main motive and not even as the important motive for a trip” (Toivonen, 2006:41). Evidently, the omnivorousness poses a challenge to the effectiveness of the motivation based market segmentation especially in cultural heritage tourism. Benefit segmentation and the focus on the existential value of tourist consumption might prove more effective in counterbalancing the evidently weak relationship between motivation and tourist experiences.

Another problem for motivation-based segmentation arises from the fact that post-modernity changes the analysis of motivation because “motivations have been conventionally explained in a systematic model of purpose which assumes rationality” (Ryan, 2002:26). It can be argued that the omnivorousness of tourist consumption will in the near future become a dominant form of tourist consumption and consequently pose a challenge as it subsequently nullifies the current casual relationship between numerous classes of tourist attractions, tourist motivations and related (sub)types of tourism. Further evidence of complications arising from omnivorousness of tourist consumption can be found in the research study conducted by van Vuuren and Slabbert (2011) on the behaviour of tourists to a South African holiday resort in KwaZulu Natal. The results of the factor analysis clearly revealed that enriching and learning experience is one of the five main factors of travel motivation even though the main purpose for a visit was explicitly the recreational holiday.

**Operationalisation of the theoretical constructs**

The theory of cultural motivation implying that any tourist with any type of motivation will end up consuming culture while at a destination allows for some inferences to be made from currently available international and South African sources. Based on the fact that culture is consumed as both a primary and secondary motivation, an apparent lack of data on culture as a primary purpose of travel can still be substituted by the data on the propensity for cultural consumption as the secondary motivation by international tourists on holiday and tourists visiting friends and relatives (VFR). These two segments comprise the leisure segment which is already known to consume cultural heritage as a secondary motivation. This approach is also justified by the evidence of an increase from 42.3% (2010) to 43.6% (2011) of all holiday tourists (SAT, 2011:58; SAT, 2012:59) that engage in cultural, historical and heritage activities while in South Africa.

In order to determine the behavior characteristics of the main long haul leisure segments to South Africa and even more importantly, the size of the genuine
(also purposeful) cultural tourism segment to South Africa, the surveys conducted in tourists’ respective countries and in South Africa will be utilized and further compared with the general profile characteristics of cultural tourists determined by international reports. If the characteristics correspond, it can be deduced with certainty that they are cultural tourists having culture as the main motivation for travel to South Africa. A comparison will also allow for an estimation of the genuine cultural tourism segment based on the propensity for consumption of culture in their respective countries. It will further allow for an approximation of cultural consumption of international leisure tourists while travelling to non-EU countries such as South Africa. Data available from the SAT 2011 Annual Tourism report and the South African Competitiveness Study phase 1 (SAT, DEAT & DTI, 2004) provide an insight into the nature of activities and tourist experiences, as well as satisfaction with consumed cultural heritage in South Africa.

Data regarding the profile characteristics and attitudes of European tourists towards a holiday and the consumption of culture is derived from two surveys, Gallup 2009 and the Eurostat Cultural statistics 2011. The Gallup survey is an opinion poll based on the responses of 27,127 of randomly selected citizens over 15 years old from 27 EU states (Gallup, 2009:4). Eurostat is a statistical service of the European travel Commission which integrates the statistical results supplied by all 27 EU member states. The data source for the 2011 report titled “The Cultural Statistics pocketbook” is based on the survey results of 26,755 citizens from 27 EU member states conducted during 2007 (Eurostat, 2011:143).

Data for the USA tourists is obtained from the official annual United States reports on citizen air travel to overseas regions, Canada and Mexico 2011 published by the Office of Travel & Tourism Industries of the US Department of Commerce. The same office also published a report, “Profile of U.S resident travellers visiting overseas destinations: 2011 outbound.” Data from the above mentioned international sources are cross-referenced with the South African Tourism’s data in an attempt to provide a clearer picture regarding the size of the main long haul European and USA tourist markets to South Africa based on propensity for cultural consumption.

Profiling South African international cultural tourism markets

As already indicated, holiday and visiting friends and relatives (VFR) as a purpose for travel to South Africa constitute the international leisure market segment. From 8,339,354 international arrivals in 2011 (SAT, 2012:1) the total international leisure market for South African tourism (holiday 19.5% + VFR 25.0% = 44.5%) is 3,711,013 tourists.
Table 1: European and USA long haul leisure markets to South Africa in 2011

<table>
<thead>
<tr>
<th>Main Source Markets 2011</th>
<th>Total Arrivals</th>
<th>Holiday</th>
<th>+ VFR =</th>
<th>Leisure</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>420 453</td>
<td>38.6%</td>
<td>33.3%</td>
<td>71.9% (302 306)</td>
</tr>
<tr>
<td>USA</td>
<td>287 614</td>
<td>47.5%</td>
<td>14.8%</td>
<td>62.3% (179 221)</td>
</tr>
<tr>
<td>Germany</td>
<td>235 774</td>
<td>53.8%</td>
<td>14.9%</td>
<td>68.7% (161 977)</td>
</tr>
<tr>
<td>Netherlands</td>
<td>113 846</td>
<td>48.1%</td>
<td>17.8%</td>
<td>65.9% (75 025)</td>
</tr>
<tr>
<td>France</td>
<td>105 420</td>
<td>42.5%</td>
<td>14.6%</td>
<td>57.1% (60 195)</td>
</tr>
</tbody>
</table>


Of the total leisure market, European and USA leisure markets (as presented in Table 1) account for 778 724 tourists, while the combined value of four main European source markets is 599 503 tourists. Due to a lack of statistical data on cultural motivation the international leisure market cannot be further broken down into general and specific cultural tourists - instead the whole market is regarded as the general tourist market for South African cultural heritage tourism.

Deeper understanding of the behaviour characteristics of the main outbound markets and their preferences for cultural heritage activities is of critical importance in securing the competitiveness of South Africa as a cultural tourism destination.

**European (cultural) tourists to South Africa**

According to the Eurostat findings (2011:192) the most important considerations for the EU members when deciding on the holiday destination are value for money (44%), cultural attractiveness (31%), and the quality of services (23%).

The Gallup findings (presented in Table 2) corroborate these choices. The overall attractiveness of a destination is the major consideration for 31% of Europeans followed by cultural heritage (24%) and entertainment possibilities (15%) as the second and third most important criterion for choosing a destination (Gallup, 2009:7).

Based on the same findings (Gallup, 2009:110), the attractiveness of the environment plays a major role in the choice of a destination for 31% tourists on average. For the main holiday 36% of all respondents travelled outside the EU in 2009 (Eurostat, 2011:192).
Table 2: Attractions influencing a choice of destination for four European source markets

<table>
<thead>
<tr>
<th>Eu Main Source Markets 2010</th>
<th>Art (%)</th>
<th>Gastro Nomy (%)</th>
<th>Entertainment (%)</th>
<th>Culture &amp; Heritage (%)</th>
<th>Festivals &amp; Events (%)</th>
<th>Attractiveness (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uk</td>
<td>2.5</td>
<td>5.0</td>
<td>23.1</td>
<td>31.7</td>
<td>6.1</td>
<td>14.9</td>
</tr>
<tr>
<td>Germany</td>
<td>3.1</td>
<td>4.2</td>
<td>6.9</td>
<td>20.7</td>
<td>3.5</td>
<td>53.1</td>
</tr>
<tr>
<td>Netherlands</td>
<td>3.9</td>
<td>9.4</td>
<td>14.5</td>
<td>30.5</td>
<td>5.6</td>
<td>11.0</td>
</tr>
<tr>
<td>France</td>
<td>5.1</td>
<td>11.3</td>
<td>18.3</td>
<td>22.6</td>
<td>4.8</td>
<td>31.2</td>
</tr>
</tbody>
</table>

(Source: Gallup, 2009:109)

When selecting between the conventional and non-conventional destinations 54% of the European tourists preferred the former while 28% preferred ‘off the beaten track’ type of a destination. For half of the respondents (48%) a decisive factor in selecting a non-conventional destination is the couleur locale (Gallup, 2009:6) of whom 17% had a primary focus on cross-cultural experiences, such are visiting cities, cultural events, and cultural heritage sites. Africa as a non-conventional destination is preferred by 3.5% of UK tourists, 2.2% Germans, 2.5% tourists from Netherlands, and 6.1% French (Gallup, 2009:116).

The volume of culturally motivated travel from the four main European source countries to South Africa is 164 675 (as presented in Table 3). It is calculated when the percentage of tourists having culture as the main motive for travel according to Gallup is deduced from the numbers depicting the South African leisure segments for each European country. It can be further calculated that a total of 164 675 tourists, as presented in Table 3, are in fact genuine cultural tourists having culture and heritage as the main motive for travel. They represent 27.5% of the European leisure market in South Africa. Genuine cultural tourists coincide with purposeful cultural tourists from McKercher’s typology of cultural tourists.

Table 3: Estimated volume of culturally motivated travel to South Africa from four European source markets

<table>
<thead>
<tr>
<th>European main source markets for SA in 2011</th>
<th>Leisure market to SA Total:599 503</th>
<th>Role of culture &amp; heritage in a choice of destination (Gallup %)</th>
<th>Culturally motivated travel to SA 2011 (Gallup %)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uk</td>
<td>302 306</td>
<td>31.7</td>
<td>95 831</td>
</tr>
<tr>
<td>Germany</td>
<td>161 977</td>
<td>20.7</td>
<td>33 529</td>
</tr>
<tr>
<td>Netherlands</td>
<td>75 025</td>
<td>22.6</td>
<td>16 956</td>
</tr>
<tr>
<td>France</td>
<td>60 195</td>
<td>30.5</td>
<td>18 359</td>
</tr>
</tbody>
</table>

(Sources: Gallup, 2009:109; Stats SA, 2012:8); Total 164 675.
South Africa calling cultural tourists

According to the US Office of Travel and Tourism Industries: The profile of US travelers visiting overseas destinations in 2011, the volume of USA outbound leisure travel (holiday + VFR) was 22,321,000 in 2011 (US, 2012a:10). According to the same source 3% of all USA outbound leisure tourists traveled to Africa while 0.8% visited South Africa in 2011. Derived from USA statistics a total of 178,568 USA tourists visited South Africa which corroborate the number of 179,221 USA tourists as reported in South African sources.

In terms of their behavioural characteristics, the USA outbound tourists show similar preferences towards consumption of cultural heritage products as their European counterparts. According to USA source, 35% of all leisure tourists (Leisure + VFR) visited cultural heritage sites in a destination visited, which further implies that 7,812,350 USA tourists travelling overseas are the general cultural tourists (US, 2012b:11). The most important leisure activities undertaken at a destination in 2011 are: 53% visited historical places, 24% visited art gallery or museum and 14% visited ethnic heritage sites.

It is interesting to note that very similar data emerges from the SAT 2011 Annual Tourism Report (2012:130) whereby 49% (or 87,818) of all USA tourists are visiting cultural, historical and heritage attractions in SA. When the USA tourists’ high preference for visiting historical places (53%) and cultural heritage sites (35%) is applied on the USA leisure market in South Africa totaling 179,221 tourists, it can be deduced that at least 94,987 will visit South African historical sites and 62,727 will visit a cultural heritage site. Furthermore, 43,013 will visit a museum or art gallery (24%) and further 25,091 will visit a South African cultural village (14%). Arising from the theory of omnivouressnes and taking into consideration the high level of cultural capital of tourists consuming cultural heritage and art, the data from the three categories can be combined resulting in 200,727 USA tourist visits to cultural heritage sites in South Africa. When the USA cultural heritage (genuine) consumption (94,987) is combined with the European specific (purposeful) cultural heritage consumption (164,675), it can be estimated that 259,662 long haul European and USA leisure tourists were genuine cultural tourists in South Africa in 2011. From a total of 778,724 European and USA leisure tourists, it can be calculated that the genuine cultural tourism market segment for South Africa is 21%. This is an important estimate and the significance of the 21% share of purposeful cultural tourists in South Africa is further evaluated against the research findings from different studies.

For example, in McKercher’s (2002:33) initial study on the typology of cultural tourists conducted on the sample of 2066 departing international tourists from the Hong Kong international airport, the purposeful cultural tourists accounted for 11.8%. Of those, 20.5% were Americans, 6.8% from the UK, and 9.8%
Australians. In explaining these variations, Richards (2007:27) suggests that the further the tourists travel and the less familiar the destination, “the higher proportion of tourists who deliberately seek a genuine cultural experience.” The same can explain the very high occurrence (21%) of purposeful cultural tourists in South Africa. The occurrences of other types of cultural tourists from McKercher’s original study (2002:36) are 6.2% serendipitous, 27.9% incidental, 23.5% casual and 30.7% sightseeing.

Another study conducted in Taunggyi-Inlay Region of Myanmar (Htun & Chaisawat, 2008) on 250 foreign tourists showed a 20% occurrence of the purposeful cultural tourists, the same as in South Africa. The study is interesting as the majority of tourists were from Europe (56.7%) and USA (10.7%) allowing for a comparison with South Africa.

**Cultural heritage activities vs. experiences**

According to the SA Global Competitiveness Study (SAT, DEAT & DTI, 2004:369) the Americans (85%) and Europeans (77%) are the most interested in South African cultural activities.

While European tourists’ participation rate in cultural activities is 39% (SAT, 2012:130), only 5% regard cultural experience as their best experience in South Africa (SAT, 2012:130). So do also 35% of American tourists feel that their demand for cultural experience did not materialise due to a lack of satisfactory cultural product offerings.

Since 2007 when the ‘new’ category ‘culture and heritage’ has been included for the first time into SAT Annual Tourism reports, (SAT, 2008a:104) the poor ratings of culture and heritage as the best tourist experience in South Africa corroborate the opinions of the international tourists. In the 2011 SAT Annual Tourism Report a mere 2% increase (SAT, 2012:134) in tourists rating of ‘culture and heritage’ as the most positive experience in South Africa in the past three years is evident. What is more worrying is the evidence of the falling trend 2007-2011 in the ratings of ‘culture and heritage’ experience across the entire South Africa’s long-haul international generating markets. The USA rating dropped from 12% in 2007 to 5% in 2011 while Europe decreased from 10% to 5% in the same period. This is in stark contrast with relatively stable trend of actual consumption of ‘cultural, historical and heritage’ by the same markets for the same period 2007/2011; USA decreased only 4% (from 53% to 49%), while Europe decreased 8% (from 47% to 39%) which is a cause for concern.

Regarding the tourist satisfaction with the consumed products, the category ‘culture and heritage’ does not feature in any of the reports. Even though ‘culture and heritage’ is not included in the satisfaction ratings it can be postulated that a
discrepancy between the percentage of actual consumption and ratings of ‘culture and heritage’ as the best experience in South Africa can only be indicative of tourists’ dissatisfaction with the consumed cultural heritage products in South Africa.

**Conclusion**

The aim of this article was to present an overview of the issues arising from cultural motivation in cultural heritage tourism in general, to differentiate between the specific and general cultural tourist motivations, genuine and accidental consumption of culture and heritage, to provide an insight into the main behaviour characteristics of South African main long haul leisure markets (Europe and USA), to determine the size of culturally motivated travel to South Africa and finally to critically analyse international long haul source markets’ participation rate in cultural activities and corresponding experiential values.

What clearly emerged from the brief presentation of the international and SAT data related to the cultural heritage activities and experiences of European and USA genuine cultural tourists in South Africa is the fact that the problem does not lie in a lack of tourists’ interest in South African cultural heritage products but rather in the low experiential value of country’s culture and heritage. South Africa is calling and cultural tourists are coming but plummeting ratings of the experiential value of South African culture and heritage are a reason for concern. Even more so because the problem cannot be rectified unless we know where in its strategic decisions and promotion of the country the government is going wrong and which and how many of the country’s main cultural heritage products are the most disappointing to tourists. This implies that more research on this topic is required. Steyn and Spencer (2011:198) in the analysis of South African macro tourism policies provided an insight into some of the main tourism related problems: tourism promotional policies are not working well; SAT as well as regional tourist authorities’ marketing skills are questionable; the strategic direction regarding SAT market positioning and marketing focus are wrong therefore chances of success are limited.

The authors (Steyn & Spencer, 2011:198) rightfully point out a major problem of South African government’s direct political interference in creating the cultural image of South Africa which is not exactly what European main source markets expect or desire:

“A clear differentiation between South Africa and its neighbors in terms of marketing strategy could help tourism, but such an approach clashes directly with government’s efforts to form stronger African alliances. To what extent a more Afro-centric approach appeal to European visitors is uncertain, but it is certainly the wish of the present government to
promote African cultures and create a stronger African image” (Steyn & Spencer, 2011:198).

Whatever the cause of the problem, the fact still remains that our culture and heritage is not satisfactory not only for the genuine (purposeful) cultural tourists who make up 21% of two main leisure source markets (for whom the authenticity of experience is simply a non-negotiable), but also for a substantial percentage of general cultural tourists who are much more tolerant in their assessment of experiential value of destination’s cultural heritage. In order to address the problem of inadequate offerings of cultural heritage tourism resources and their overall unacceptably low experiential value, the following should be addressed as a matter of urgency:

- Inclusion of culture as a purpose for visit in the SAT International Exit questionnaire will facilitate informed decisions regarding development of cultural tourism in South Africa while providing justification for future investments into the cultural heritage sector;
- Introducing mandatory visitors surveys at various cultural heritage sites in order to establish which cultural heritage tourism products are underperforming and why;
- Better communication with the industry about the size and potential of the genuine cultural tourism market;
- More effective management of cultural heritage attractions for tourism. Specifically better communication with and education of cultural heritage managers regarding methods to effectively balance tourism use with their conservation mandate; and
- Focus on political cultural heritage arising from the unique South African struggle history and packaging and marketing complimentary attractions into attractive and unique South African cultural products such as connecting townships into a cultural route.

If not resolved, this particular problem can cause an irreversible damage to South African tourism because as a “competition among tourism destinations has become very intense, more destinations are competing on the experience level” (Saayman & Du Plessis, 2003:58). South Africa has unique cultural tourism products that need to be packaged and promoted. What sets apart the numerous cultural heritage assets around the world is a distinctiveness of their respective histories which prevent possible replication by competing destinations. The variety and distinctiveness of cultural heritage forms a basis for clear delineation between the attractions at the experiential level. This is the reason why cultural heritage assets have been used as a point of differentiation between competing destinations and “feature prominently in destination-branding strategies” (McKercher & du Cros, 2002:155). An acknowledgement “that foreign tourists are exposed to fewer and less authentic cultural experiences than they expect or...
desire” (SAT, 2010:47) and that “our cultural assets are largely unclear in the consumer’s mind, and undifferentiated from the rest of the continent” (SAT, 2008b:37) despite the fact that 91.67% of international tour operators consider ‘historical and cultural’ resources the ‘strength’ of South Africa as a tourist destination (Saayman & Du Plessis, 2003:60) is one of the contradictions which currently hinders the future development of cultural tourism in South Africa. The main question still remains: Would cultural tourists keep on coming and for how long?

References


