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Development of a framework to assess the economic impact of Coastal and Marine Tourism (CMT) in South Africa – Reflections on primary research undertaken

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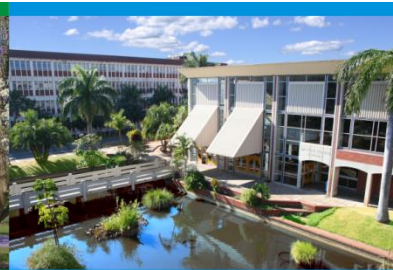
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Presentation outline

- CMT scope
- CMT economic modelling approaches
- Data collection challenges
- Conclusion and recommendations

CTM and leisure activities

CMT and Leisure

Water-based

for example, marine coastal zones, seas, oceans and ice-associated areas

Coast/ beach development

accommodation, restaurants, food industry, and second homes, and the infrastructure supporting coastal development

Tourism

any activity undertaken when a person is "outside his or her usual environment for a specified period of time"

Leisure/ recreation

a wide variety of activities which are undertaken out of choice during leisure or play

Marine tourism and coastal tourism identified by the CMT Lab (NDT, 2016)

Marine Tourism	Coastal tourism
<ul style="list-style-type: none">- Marine wildlife tourism (e.g. seals, dolphins, turtles etc.)- Recreational fishing (e.g. boat-based fishing, spear fishing, fishing competitions etc.)- Scuba diving/ snorkelling (e.g. shark cage diving)- Water sports (e.g. big wave surfing, yachting, water skiing, water surfing etc.)- Ocean experience (e.g. cruise tourism, marinas, island tourism, under water archaeology etc.)- Events (e.g. marine competitions)	<ul style="list-style-type: none">- Coastal wildlife tourism (e.g. land-based whale watching, marine turtle tours etc.)- Sand/ beach sport (e.g. kite-flying, beach combing, sand dune surfing etc.)- Coastal heritage and events (e.g. local seafood and cultural tourism, cultural history etc.)- Sightseeing (e.g. light house tourism, cycling, marathons etc.)- Educational and scientific excursions (e.g. aquariums etc.)- Spiritual experiences- Pure recreational (e.g, dining out, shopping)

Key thematic issues emerging from literature review

- Growing importance of CMT globally and nationally (Operation Phakisa context and framework in South Africa)
- Growing prominence of water-dependent recreational activities
- CMT is amongst the largest and oldest sectors of the tourism industry
- Range of different types of coastal and marine tourism and recreational activities
- CMT is diverse and covers a range of coastal and marine assets (beyond cruise and beach tourism)
- Socio-economic and environmental/ conservation roles of CTM emphasised
- Importance of Marine Protected Areas (MPAs) foregrounded
- Increasing threats that impact on CTM which includes climate change, economic shifts, security concerns and developmental demands

Economic contributions of CMT case studies

- Numerous studies focusing on the economic impacts of tourism (many events tourism) but fragmented and limited research on CTM
- Focus on national and global or product specific contributions (such as whale watching) contributions based primarily on tourism figures
- Main methodological approaches
 - Survey based (tourists/ visitors and tourism enterprises)
 - Macro-economic analysis drawing on national economic data
 - International datasets (eg. UNTWO)

Approaches to measure CMT economic impacts

- *Cost Benefit Analysis (CBA)*
- Input-Output (I-O) models
- General equilibrium models
- *Tourism Satellite Account (TSA)*
- Time-series forecasting methods

Issues for consideration

- Addressing secondary benefits and multiplier effects
- Types, scope and quality of data/ information required
- Sample sizes
- How to ensure reliability and validity?

Phase 2 objectives

Develop

- A standardised framework that will assist in measuring, monitoring and managing the economic impacts of CMT in South Africa

Pilot

- Identify key economic indicators
- Develop survey instruments
- Pilot surveys in coastal provinces

Economic modelling

- Subject results from piloting to economic modelling using: Cost Benefit Analysis (CBA), Input-Output (I-O) Models and Tourism Satellite Accounts (TSA)

Revise/ review

- Surveys and data collection tools
- Sampling framework
- Methodological approach

Phase 3 implementation

- Framework developed for implementation
- Appropriate/ best fit economic model/s chosen

Phase 2 Approach

- Identification of key indicators
 - Tourism/ visitor information (room occupancy vs bed occupancy, spend)
 - Job creation (actual and type as well as potential and transformation imperatives)
- Focus on supply and demand side variables
- Targeting of following key CMT stakeholders (surveys developed):
 - Coastal and marine tourism business owners
 - Clients/ Customers/ Users
 - Coastal and marine tourism and hospitality businesses
 - Accommodation
 - Tour operators
 - Restaurants and retail outlets (a short customer survey to accompany these surveys)
 - CMT stakeholder associations/ organisations

Pilot sampling

- Sampling distribution framework and number of surveys completed

Surveys	KZN	WC	EC	NC	Total	Number completed
Customer/ tourist/ user	80	70	30	20	200	201
Accommodation	20	15	10	5	50	21
CMT business owners	25	20	15	10	70	13
Retail outlets and establishments (+ 5 customer surveys per site)	20	15	10	5	50	26 (97 customer surveys completed)
Tour operators	10	10	5	5	30	13

Data collection challenges

- Spatial scope of what constitutes CMT
- Surveys not completed in Northern Cape
- Surveys mostly completed in KwaZulu-Natal followed by Western Cape and Eastern Cape
- With the exception of **customer/ tourist/ user surveys**, the targeted sample size was not met for the other stakeholders due to the following challenges:
 - Unwillingness to participate (especially among the supply side stakeholders such as accommodation and CMT businesses)
 - Unable to get permission to undertake surveys
 - Unable to locate/ access stakeholders (such as CMT businesses and tour operators)

Reflections on data collection instruments

- Surveys too lengthy
- Quality of data collected (especially self-completion surveys)
- Specific questions
 - Poor recollection of monthly information
 - Difficulties in estimating proportions
 - Confidentiality challenges
 - Information on employees
 - Income and expenditure information
 - Service providers: poor response

Conclusion and recommendations

- Need to focus on demand side data collection (customer/ user/ tourist surveys)
- Revise specific survey questions
- Rethink sampling approach
- Phase 3 implementation
- Guiding principles
 - Simplify the system and approach
 - Develop tools and data collection guidelines to improve data consistency and quality
 - Adopt a consultative and collaborative process
 - Permit comparative and trend analyses over time
 - Research as well as monitoring and evaluation efforts on CTM need to be aligned and consolidated

Thank You! Siyabonga!



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