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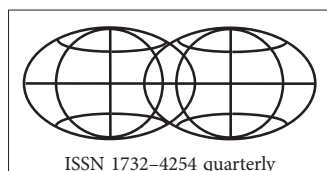
**The timeshare industry of Africa : a
study in tourism geography**

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The timeshare industry of Africa: a study in tourism geography

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Abstract. Within the broad spectrum of tourism accommodation the timeshare industry is a distinctive segment which has attracted only limited research work. This paper represents a contribution to tourism geography as it investigates the location of timeshare resorts in Africa and comparative position of African destinations in the global timeshare economy. The analysis shows the timeshare resort industry in South Africa is the most significant on the continent and is distinctive in its reliance upon domestic rather than international tourists. In terms of the distribution of resorts the key locational consideration in Africa parallels that found in other parts of the world, namely the positioning of resorts in areas of high natural amenity. In the African context this has meant clustering resorts in coastal beach areas and attractive mountain locations, as well as in the areas which afford opportunities for timeshare consumers to experience the African bush. Finally, of note in South Africa is the growth of large timeshare property developments at casino resorts, a development which parallels the experience of certain timeshare developments in the USA.

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1. Introduction

Clegg and Essex (2000) as well as Timothy and Teye (2009), among several writers, draw attention to the central role of the accommodation sector within the tourism industry. For tourism geographers there is a challenge to deepen research for understanding the evolution, workings and organisation of the accommodation sector as part of the tourism economy. In the international context the accommodation sector is attracting a growing volume of research which is differentiated by the existence of different segments of accommodation. Specific and distinct areas of scholarship and debate have arisen, for example, in the international context around different forms of accommodation and their role in international, national and local tourism systems (Timothy, Teye, 2009). For instance, the hotel sector was a critical focus of attention for certain researchers (Rogerson, 2010, 2011a, 2011b; Rogerson, Kotze, 2011; Rogerson, 2013). Other work opens up debates around small-scale forms of accommodation, such as bed and breakfasts or guest houses, research on second homes tourism, or in the African context of the distinctiveness of the safari lodge.

Tourism geographers contribute increasingly to this literature on the accommodation sector, including the research on the supply-side or locational aspects of different forms of accommodation (see e.g. Hoogendoorn, Visser, 2010a, 2010b; Ioannides, Timothy, 2010; Baker, Mearns, 2011; Hoogendoorn, Visser, 2011; Rogerson, 2013). The focus here is upon a neglected aspect of the accommodation spectrum, namely that of the timeshare industry. Timeshare, or shared vacation ownership, as it is increasingly

known, occupies a unique position within the accommodation spectrum (Sharma, Chowdhary, 2012). Not only is the product unique (Sharma, Chowdhary, 2012), highly specialised (Scavo Esq., 1999) and dynamic in its evolution (Pryce, 2002), but also timeshare represents an approach to leisure accommodation, marketing, sales and resort development that has changed significantly the overall nature and structure of the lodging industry (Upchurch, Lashley, 2006). From a tourism-geographical perspective, this paper analyses the position of the timeshare industry of Africa within the global industry of timeshare and the current spatial distribution of timeshare developments in Africa. Special focus is upon South Africa, the leading focus for the timeshare industry in Africa. Methodologically, the paper draws from a range of different sources. These include primary interviews with key stakeholders involved in the development of timeshare resorts in Africa, analysis of websites of leading timeshare companies and an examination of industry reports.

2. Situating the timeshare industry

The timeshare industry represents a distinctive segment within the broad spectrum of tourism accommodation (Hawkins, 1985; Terry, 1994a, 1994b; Upchurch, Lashley, 2006; Brey et al., 2007; Powanga, Powanga, 2008; Timothy, Teye, 2009; Cortes-Jiminez et al., 2012). Timeshare is sometimes referred to as vacation ownership or interval ownership (Ioannides, Timothy, 2010). Upchurch and Lashley (2006) argue that timeshare or vacation ownership is a relatively recent leisure phenomenon and an addition to the existing forms of tourism accommodation.

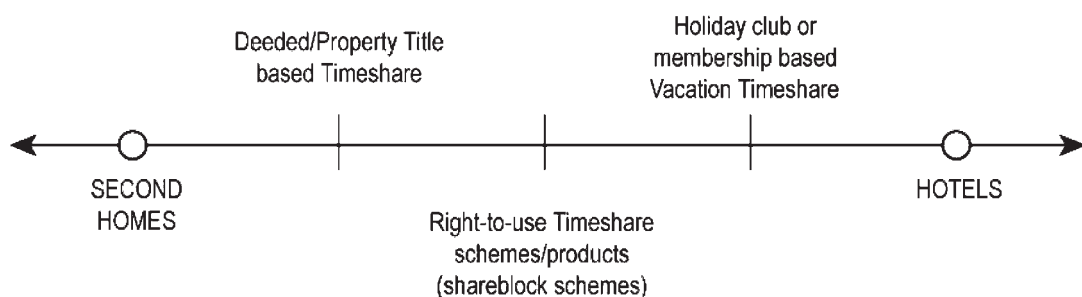


Fig. 1. Accommodation spectrum and property timeshare

Source: Authors' work

Within a spectrum of forms of accommodation, different forms of timeshare occupy an intermediary position between second homes and hotels (Fig. 1). Although its definition is contested, the term “timeshare” refers essentially to the practice of dividing accommodation units into (usually) weekly increments or intervals and selling them to consumers (Zacharatos, Stavrinoudis, 2009; Huang et al., 2010a, 2010b). Hahm et al. (2007: 223) consider timeshare as “the right to purchase a specific time period in which a purchaser can use a unit within the timeshare resort at a geographical location of choice”. For Bakic et al. (2012: 18) the “main feature of the timeshare product is to ensure various consumers to own the capacities which in regular conditions, according to their income, they would not be able to afford”. The timeshare segment is widely considered one of the most rapidly growing segments of the global tourism economy (Hahm et al., 2007; Sharma, Chowdhary, 2012). Hitchcock (2001: 230) observes timeshare “is becoming ever more integrated part of the ‘mainstream’ holiday market”.

Despite the rise in importance of timeshare internationally, this segment of tourism accommodation has not attracted the amount of detailed scholarly attention that has been given to other forms of tourism accommodation, such as bed and breakfasts, second homes or hotels. Stringam (2010: 38) observes that research on timeshare and vacation ownership is “sparse” and adds that the majority of existing writings are undertaken from the perspective of marketing rather than tourism. Likewise, Huang et al. (2010a: 15) assert that “existing scholarly literature on timeshare is mostly from the perspectives of marketing or real estate development”. Thematically, the strongest foci in academic research on timeshare surround the issues of marketing, consumer behaviour and the management of timeshare operations. The majority of writings reflect a marketing or hospitality management perspective with few contributions deriving from a tourism perspective and examining the development of timeshare as part of the tourism economy of particular countries. Overall et al. (2009: 2) point that “the main weakness of timeshare on an international level is its limited scientific investigation and its fragmentary study”. Further, they bemoan the fact that most scholarship “has been research funded by enterprises aiming at collecting specific

quantitative data concerning specific subjects pertaining to their business interests” (Zacharatos, Stavrinoudis, 2009: 2). In terms of location or spatial issues the existing timeshare writings are silent such that for tourism geographers the timeshare industry has been *terra incognitae*. The work of Timothy and Teye (2009) is noteworthy as the only available study to offer any discussion on the factors influencing the geographical patterns of timeshare resort development in particular countries, the USA being their example.

Looking at the existing volume of writings on timeshare it is not surprising to record that most academic material relates to timeshare developments and the industry in either North America or Western Europe, the two leading regions for timeshare in the world (Upchurch, Gruber, 2002; Upchurch, Lashley, 2006; Kaufman et al., 2011). Outside of these areas only a handful of studies have been undertaken on timeshare (Crotts, Ragatz, 1998). Few investigations are available for sub-Saharan Africa. Indeed, a number of recent reviews on tourism scholarship in Africa, including of works by tourism geographers, point to a gap in the knowledge concerning the timeshare industry (Rogerson, Rogerson, 2011; Rogerson, Visser, 2011; Visser, Hoogendoorn, 2011; Rogerson, 2012).

3. Location of the timeshare industry: Africa in the global economy

In one of the earliest academic contributions on the timeshare industry Terry (1994a) drew upon industry sources to portray a picture of the state of the timeshare industry on a global basis. In 1992 there was a recorded total of 3,050 timeshare resorts globally with an estimated 2.36 million owners, the majority of whom were residents of the country where the timeshare property was located. Of the global population of resort developments a total of 2,168 resorts or 71 percent were located in the United States or Europe, the two original heartlands for timeshare property development. The United States accounted for 44 percent of global resorts in 1992. The next most significant areas for timeshare resorts were Mexico (201 resorts), South Africa (135), the Caribbean (131) and South America

(115). In terms of residence of the timeshare owners once again the United States, with 1.41 million owners, were the most significant market, followed by Europe (424,000), Mexico (124,000), South Africa (120,000) and Canada (94,000).

One striking finding from Terry's (1994a) global analysis was of the significance of Africa, in particular of South Africa, in the global marketplace of timeshare property development. It was observed that during the 1980s South Africa's timeshare industry was acknowledged as one of the fastest growing timeshare destinations in the world. Since the 1990s, however, the industry has experienced a phase of consolidation at a time when other new international destinations for timeshare devel-

opment, particularly in North and South America, have been recording a rapid pace of expansion. The work of Pandey (2013) tracks the early development and evolution of the timeshare industry in South Africa, which catered almost exclusively for the domestic tourism market dominated by white South African leisure seekers. Indeed, it shows that the essential geography of the timeshare industry in South Africa was firmly established by 2002 when the last of the country's major timeshare based accommodation developments was completed. By 2002 the growth of South Africa's timeshare industry had reached its highpoint and in relative terms its position has been declining in the global league tables of timeshare development (Stocks, 2008; Pandey, 2013).

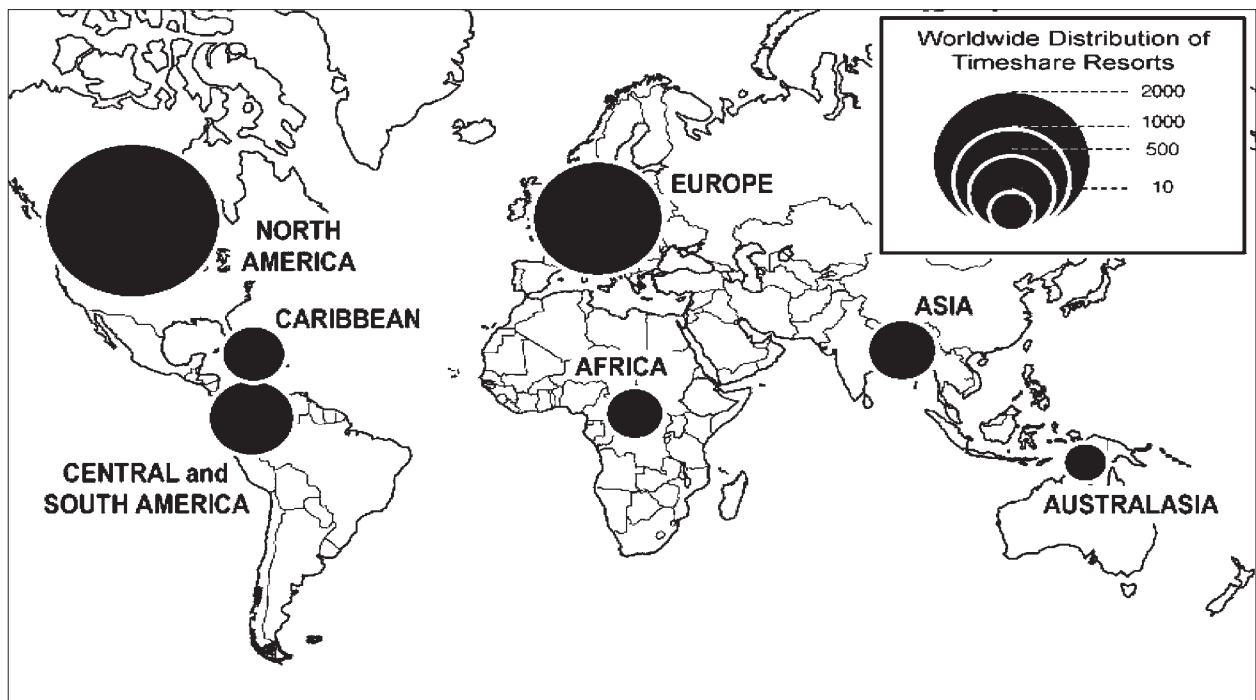


Fig. 2. International distribution of timeshare resorts, 2012

Source: Based on the data from AIF, 2012

Figure 2 provides a global profile of the geographical distribution of timeshare resorts in 2012. It is evident that North America and Europe continue to dominate the global timeshare industry followed by Central and South America, and the Caribbean. Outside of these regions Pacific Asia, including Australasia, has seen a growth in the number of timeshare developments in the region, especially in India and China. The continent of Africa represents now the smallest share of timeshare

resort development at the global scale. It is observed that the region of North America, the global heart of the timeshare industry, has an estimated 2,500 resorts alone, accounting for roughly 46% of all timeshare developments worldwide (AIF, 2012). Of this total, the largest share of timeshare resorts are in the USA, with extensive clusters in Florida, California, South Carolina and Hawaii. Florida hosts a total of 362 timeshare resorts or 23% of all timeshare developments in the United States, an amount of time-

share development which alone exceeds that of the entire South African industry, the largest focus of timeshare operations in Africa.

In terms of specific location, timeshare resorts in the USA are typically situated at beach locations, areas of natural beauty, and with golf courses, themes which are reflected also in the African experience. Another dimension of the location of timeshare resorts in the USA which replicates the European pattern is a close association with the development of

certain timeshare resorts linked to the skiing industry, a phenomenon that is not manifest in Africa. The rest of the timeshare resorts in the USA are distributed across a range of urban locations, casino resorts, and theme parks. Overall, the spatial patterns of the industry in the USA reflect the importance of resort development in the areas of high amenity; including those with favourable climates in relation to year-long resort occupancy (see Timothy, Teye, 2009).

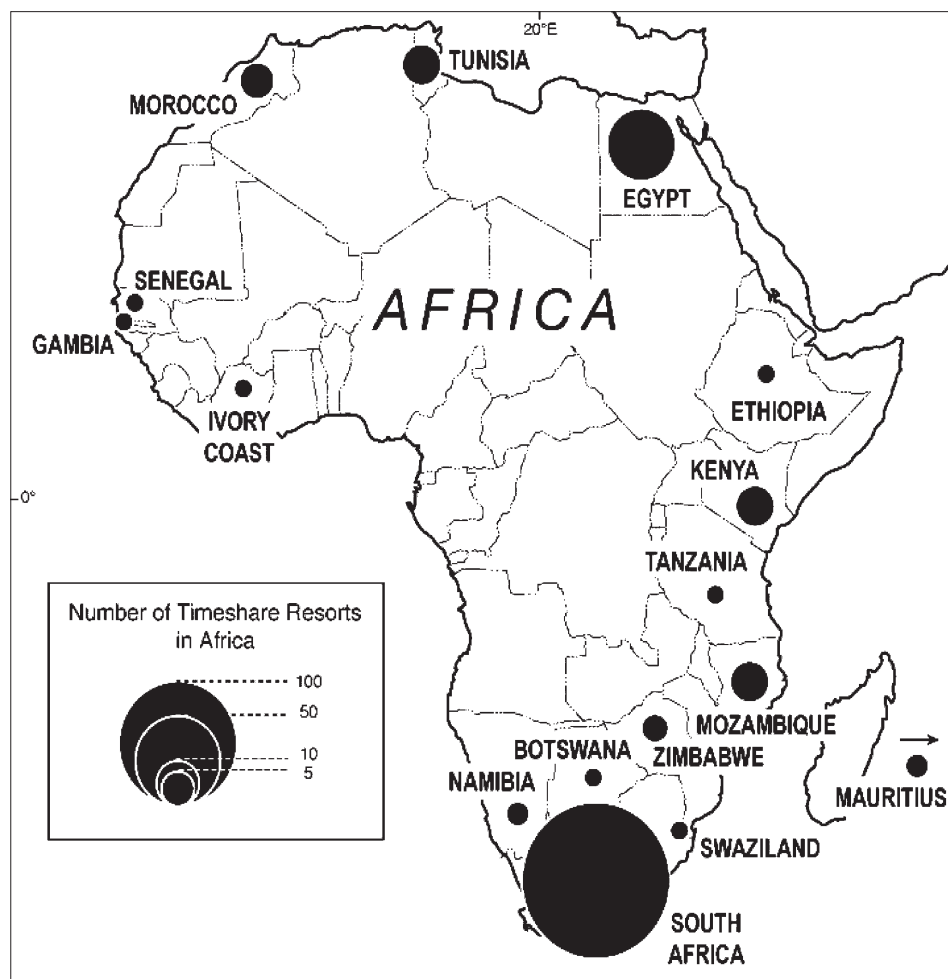


Fig. 3. Number of timeshare resorts in different African countries

Source: Based upon the data from the RCI and Interval International websites

Figure 3 unpacks the analysis at a country scale to reveal the total number of timeshare resort developments across different African countries for 2012 (RCI and Interval International websites). Although its global ranking fell between 1992 and 2012 it is evident that South Africa continues as the leading

focus for timeshare developments in Africa. The strong dominance of South Africa reflects the historical purchasing power of the mainly (white) domestic consumer market as well as macro-factors of the country's relative economic and political stability as compared to other African destinations (cf Mi-

halic et al., 2013). In terms of numbers of timeshare resorts, South Africa is followed by Egypt in second place and then by a group of countries which include Tunisia, Morocco, Kenya and Mozambique.

At a regional scale of analysis it can be observed that four concentrations or broad regional timeshare based clusters can be discerned to exist within the African continent. The first one is a northern cluster which encompasses Egypt, Tunisia and Morocco. The second one is a weak cluster in West Africa which includes the countries of Senegal, Gambia and Ivory Coast. The third one is the East African cluster encompassing Ethiopia, Kenya and Tanzania. Finally, there is the most important southern cluster which is dominated by the timeshare developments in South Africa. Beyond South Africa, however, the southern cluster incorporates a number of timeshare resorts in Botswana, Mozambique, Namibia, Mauritius, Zimbabwe and Swaziland. Collectively this southern cluster – with South Africa at its heart – contains a total of 183 timeshare resorts (Hatjigiannakis, 2012). In many ways the established patterns of timeshare development in this region mirror the broader tourist patterns in Southern Africa with South Africa forming the core regional tourist economy surrounded by the peripheral tourism economies of Swaziland, Mozambique, Zimbabwe, Botswana and Namibia (Rogerson, 2009).

In many countries of Southern Africa the evolution of timeshare has been linked to the specifically targeted South African market (Ragatz Associates, 2004; Grant Thornton, 2010). This is exemplified by the case of Botswana where Tuli Lodge, established in the 1980s, was a luxury bush timeshare development geared or established almost exclusively to cater for South Africa's potential timeshare consumer base. The Tuli Lodge development is noteworthy as at the time it represented one of the first timeshare developments away from coastal locations and seemingly the first timeshare based safari lodge of its kind anywhere in the world. The more recent emergence of Mauritius as a destination for timeshare development has also been primarily allied to a high end South African consumer market (Joubert, 2012).

It has been pointed out that the South African timeshare industry is distinguished by its historical anchor of domestic tourism. It is estimated that in South Africa the international timeshare own-

ership base only accounts for as little as 2% of the total weeks or units available, most of which are accounted for by regional purchasers (Grant Thornton, 2012). The operations of the international exchange groups of RCI and Interval International ensure, however, that South African timeshare is linked to global networks, albeit the industry is not dependent upon an international clientele. This situation is different from that in the rest of Africa where the domestic market for timeshare is often minimal and secondary to the dominance of international timeshare tourists (Bauermeister, 2012).

In case of the western, eastern and especially the northern timeshare clusters on the African continent, the linkages with international tourism are at the foundation of the timeshare operations in these areas. The role of the international exchange groups like RCI and Interval International is therefore vital to the functioning of these timeshare developments. The major market for international timeshare in these clusters is that of Western Europe, a pattern which reflects also the broader trends in long haul international tourism arrivals in these regions of the continent. In particular, the case of Egypt with a total of 31 timeshare developments, the second most significant country for timeshare developments, is explicable only in relation to its proximity and linkages to the European tourism market. Finally, in terms of contrasts between the southern timeshare clusters and those in the rest of the continent it should be noted that a web search of timeshare developments across Africa reveals that outside of the southern cluster all other timeshare development on the African continent are linked to hotel and resort based accommodation developments exclusively, which contrasts with the greater variation found in the spectrum of timeshare accommodation established in South Africa. The timeshare industry in South Africa enjoys the widest variety and types of timeshare accommodation products, from units located exclusively in hotels, bungalows, lodges, and mixed resort developments to holiday apartments and chalets.

Figure 4 provides more details on the location of timeshare resorts within Africa. The outstanding picture is of the massive dominance of timeshare resort developments at sea, sun and sand locations across the continent. More than two-thirds of South African timeshare developments are situated in coastal areas. With only a small number of

exceptions, timeshare resorts outside of South Africa and situated in other African countries are located in coastal centres, including the examples of Inhambane (Mozambique), Mombasa (Kenya), Malindi (Kenya), Sharm El Sheikh (Egypt) and Grand Baie (Mauritius). The most notable exception of

non-coastal timeshare development is a group of property developments in the Moroccan city of Marrakech. Beyond beach timeshare resort developments, other popular foci for timeshare developments in Africa are safari linked or bush locations as well as areas of natural beauty.

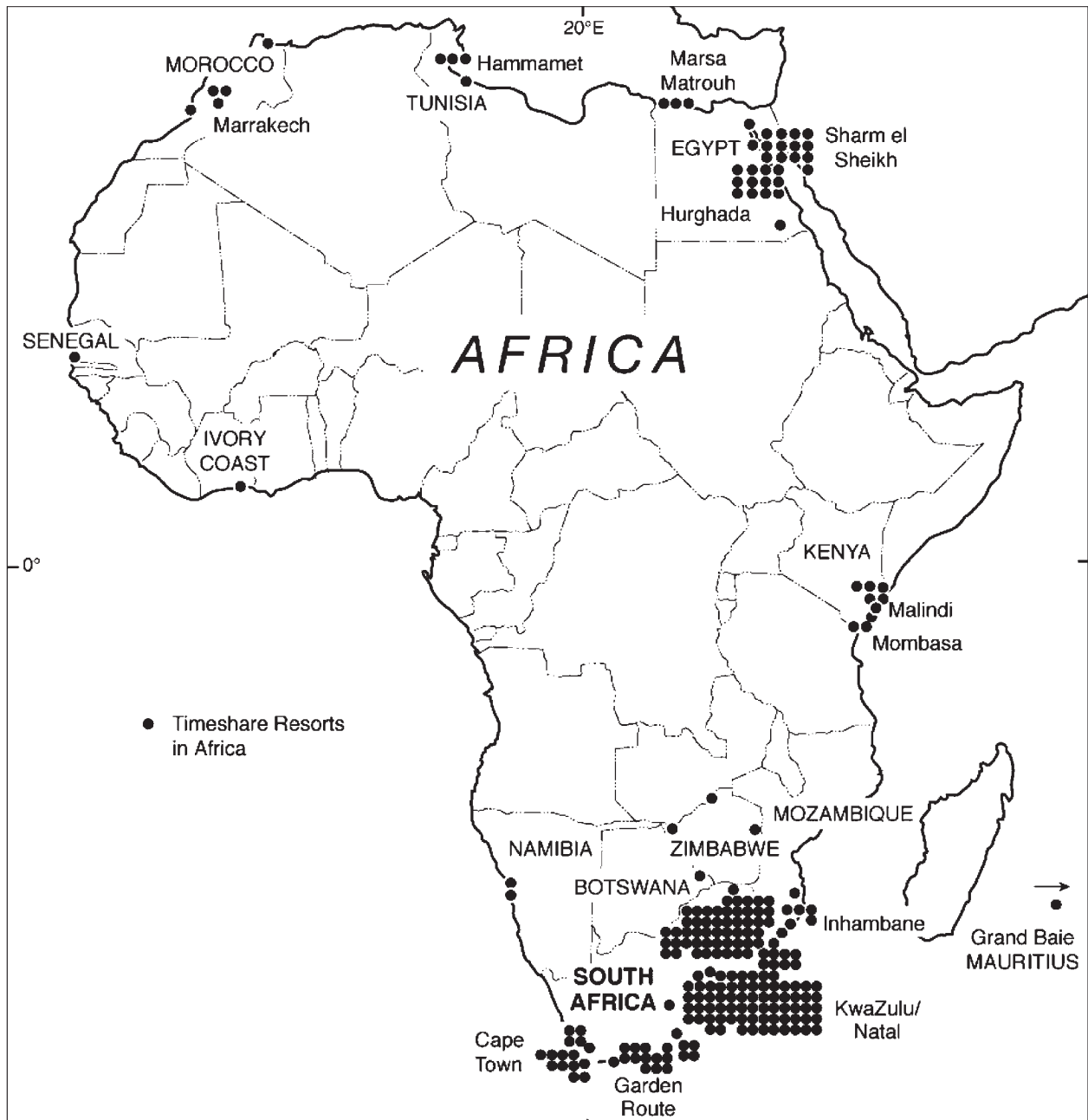


Fig. 4. Location of timeshare resort developments in Africa

Source: Based upon the data from the RCI and Interval International websites

The industry interviews disclosed a distinctive trajectory in the development of Zimbabwe's timeshare developments (Kennedy, 2012). The growth of

timeshare resorts there is linked to the country's international isolation and political unrest. With the exodus of white Zimbabweans from the country

due to political unrest much of their banked finances were frozen by the national government. A group of timeshare developers lobbied the national government to allow the release of such funds in order to specifically fund the purchase of timeshare at resorts in Zimbabwe. After the national reserve bank agreed to allow such purchases a number of white Zimbabweans expended their frozen funds on timeshare developments which were affiliated to international exchange organisations such as RCI. This action therefore facilitated their access to other resorts within the RCI network through the exchange network, in many cases without ever visiting their actual purchase resort in Zimbabwe. The timeshare resorts in Zimbabwe are mainly located in the areas of natural beauty, such as the Lokuthula Safari Lodge Resort Estate close to the iconic destination of Victoria Falls. Nevertheless, as funds from the frozen accounts are dwindling, the future of such Zimbabwe timeshare based accommodation developments is beginning to be questioned, especially with no clear consumer purchase base to target for future timeshare sales (Kennedy, 2012).

4. Geography of timeshare developments in South Africa

Finally, a discussion is presented on the contemporary geography of timeshare developments in South Africa. Figure 5 provides a profile of the location of timeshare developments in the country, using the country’s nine provinces as the base. In terms of the contemporary geographical distribution of timeshare developments, the coastal province of KwaZulu-Natal enjoys the largest number of timeshare developments, with an estimated 43% of all the country’s timeshare accommodation based developments. This is followed by the Western Cape with 19%, Mpumalanga with 11%, the Eastern Cape with 9%, Limpopo with 8%, Gauteng and the North West with 4% each, and the Free State 2% share (Grant Thornton, 2012). It should be noted that no timeshare property developments currently exist in Northern Cape.

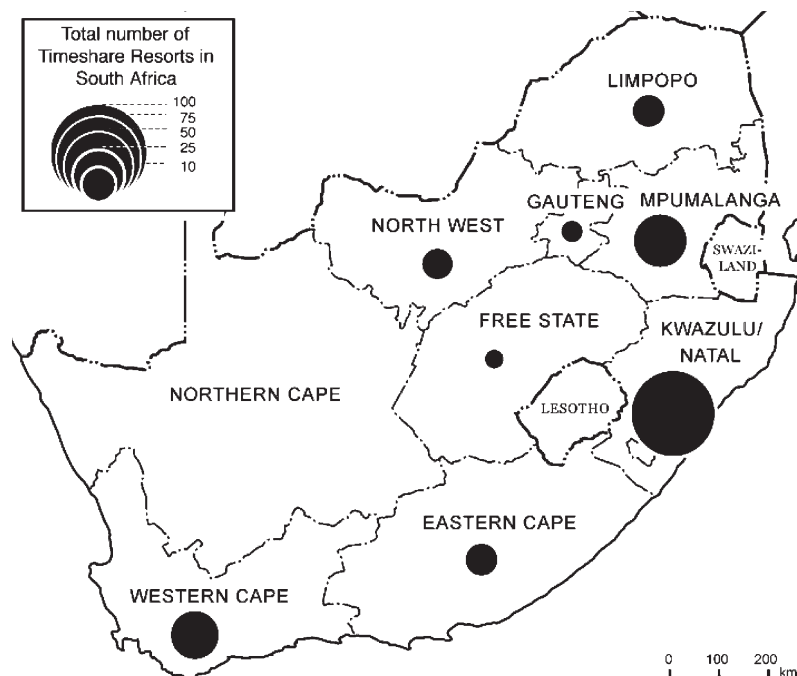


Fig. 5. Provincial distribution of timeshare accommodation in South Africa, 2012

Source: Based upon the data from the RCI and Interval International websites

Preferred Locations for Future Vacation Ownership Purchase

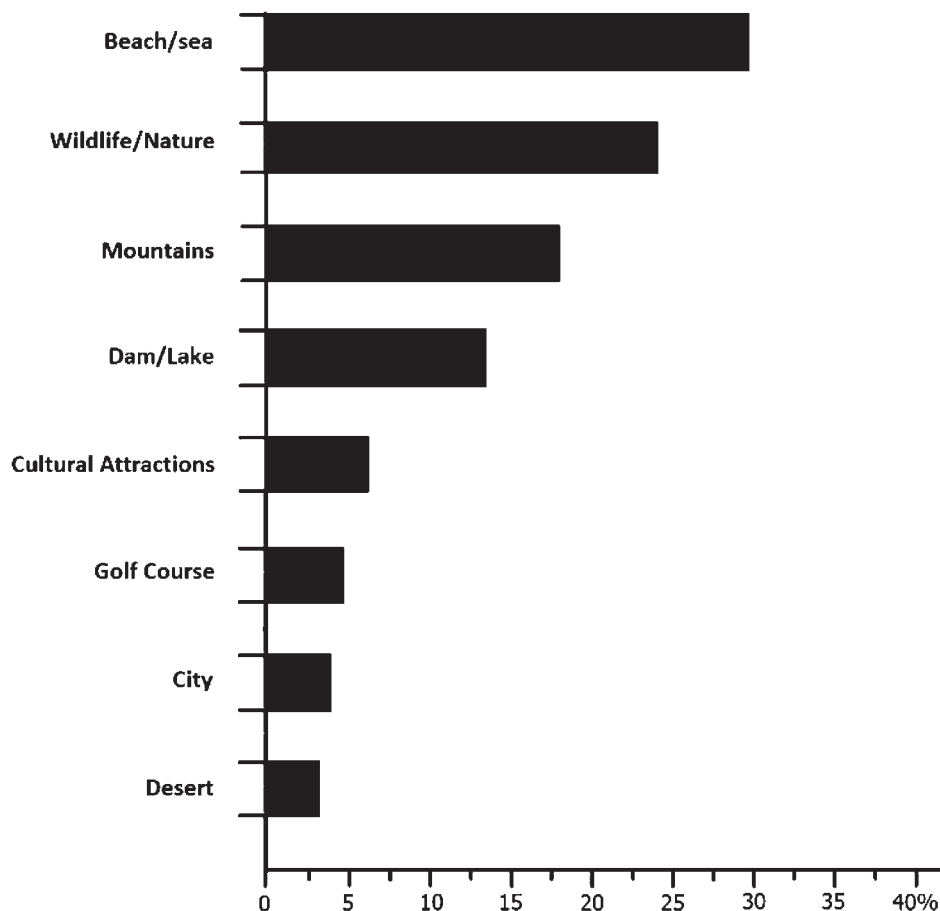


Fig. 6. Consumer preferences regarding the location of timeshare developments

Source: Grant Thornton, 2012: 75

The overall provincial distribution of timeshare developments is the result of the industry's evolution since the early 1980s with the major consumer market inland in the Gauteng economic heartland around Johannesburg and Pretoria seeking out beach locations for recreation and domestic holidays (Hatley, 1990; Pandey, 2013). The location preferences of consumers are disclosed from the findings of the South African Vacation Ownership Industry Survey (Grant Thornton, 2012). This is shown in Figure 6 and highlights the continued consumer preference for beach, bush/safari and mountain locations. In the global context, a strong preference for timeshare property development in bush or safari locations close to nature reserves is the most distinctive dimension of the location of timeshare resorts in South Africa. The groups of resorts which target consumer preferences for safari/bush experi-

ences are found in the areas of Mpumalanga close to Kruger National Park or the Pilanesberg (North West), and areas of outstanding natural beauty, such as the Drakensberg Mountains.

Outside these locations the most notable timeshare property development has been that around the Sun City casino and leisure complex in North West province. Since its establishment in the early 1980s Sun City has been recognised as the pre-eminent tourism resort in Africa (Kim et al., 2000). The timeshare developments are part of the broader Sun City resort complex which includes a combination of world-class hotels, a gaming complex, golf and game-viewing opportunities. It should be noted that, unlike the United States and other popular timeshare destinations, South Africa has few timeshare resorts that can be categorised as 'mega-destination complexes' or 'mega-resorts' which can

parallel, for example, those of Disneyland in Orlando, Florida (cf Ioannides, Timothy, 2010). More specifically, it is observed that less than 10 large timeshare based destination resorts are established in South Africa with the Sun City complex, the only resort that could be counted as a locally significant 'mega-resort' (Sayeed, 2012).

In the geography of South Africa's timeshare resorts, the Sun City complex is the largest development which currently exists in the country. The timeshare component of the resort initially offered a total of 234 units which was extended in the second phase of the development with the addition of a further 148 units, making a total of 382 units. This development includes 21,500 owners from phase one (sold off in split week intervals) and a further 13,600 owners in phase two (sold on a split week basis). This arrangement allows the owners to divide their time into a three- and four-day visit rather than an interval week. The post-1996 development of timeshare at the Sun City complex was popular and successful in its timeshare sales even at the time of overwhelming decline in sales in much of timeshare in the rest of South Africa. This large resort offers potential consumers a different recreational opportunity or potential experience to those which had been traditionally associated with the South African timeshare developments. In this case, the artificial or man-made resort itself became the centre of timeshare consumer's focus, rather the traditional market preference for timeshare involving a beach location or beautiful natural surroundings (Stocks, 2012). In addition to the establishment of the world class recreational facilities another critical success factor for this timeshare development is its geographical proximity to the South Africa's economic and consumer heartland, the major cities of Johannesburg and Pretoria (Kim et al., 2000).

5. Conclusion

The accommodation sector of the tourism industry has attracted only a relatively small volume of scholarship and analysis as is demonstrated by Timothy and Teye (2009). Timeshare accommodation is part of an array of different forms of accommodation which would include hotels, guest houses, bed and breakfast,

safari lodges, second homes, backpacker lodges and even extending to caravan parks. In the South African context, the works of both Visser and Hoogendoorn (2011) and Pandey (2013) draw attention to the absence of local scholarship relating to the timeshare industry. More broadly, issues relating to timeshare development have not commanded much attention from tourism geographers so that understanding of the spatial aspects of timeshare is undeveloped.

This paper seeks to contribute to tourism geographical scholarship on the timeshare industry. An analysis of Africa in the global timeshare economy shows that in the early 1990s South Africa was ranked as the fourth most significant location for timeshare resort developments. Since the early 1990s the growth of new timeshare resort development in South Africa has slowed relative to other parts of the world. Nevertheless, it is revealed that the timeshare resort industry in South Africa remains the most significant on the continent. Arguably, the South African timeshare industry is distinctive within Africa in terms of its reliance upon domestic rather than international tourists. In terms of the spatial distribution of resorts the key locational factor in Africa parallels that found in other parts of the world, namely the positioning of resorts in areas of high natural amenity (cf Timothy, Teye, 2009). In the African context this has meant clustering resorts in coastal beach areas, attractive mountain areas, and around locations which afford opportunities for timeshare consumers to experience the African bush. Finally, of note in South Africa is the growth of large timeshare property developments at casino resorts, a development which parallels the experience of certain timeshare developments in the USA. Overall, this analysis demonstrates the distinctive nature of timeshare as an emergent form and aspect of tourism accommodation in Africa, the peripheral position of the continent in the global industry of timeshare, and South Africa's long-established role as the leading edge of the timeshare industry in Africa.

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