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The Italian tourism market and South Africa: an initial investigation on the potential Honeymoon market

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Abstract

Although the Italian tourism market in South Africa is not the most prominent, it is relevant as it is in the top ten of South Africa's inbound market. The aim of this study is to commence a debate to explore the specific relationship between the Italian tourism outbound market and South Africa, with particular reference to the Italian honeymoon travel market. This article has limitations since limited data are available on the honeymoon travel market. This is a desk study and various sources have been used to compensate for the data scarcity on the investigated matter. After an introductory section, a literature review explores issues related to South African tourism, the Italian outbound market and the honeymoon travel market. Thereafter, a specific section on the Italian tourism market in South Africa, with specific reference to honeymoon travels, is presented. A supplementary note on the closure of the South Africa Tourism office in Italy is included. The study concludes that there is a positive match between the Italian honeymoon travel market and the South African tourism offering. Limitations of the present study and scarcity of data suggest the need to enhance the research in this area.

Keywords: Tourism; South African; Italian tourism market; outbound tourism; honeymoon tourism.

Introduction

Tourism is a long-term growing global sector. Since the end of World War II, tourism has continued to grow so that "International tourist arrivals have increased from 25 million globally in 1950, to 278 million in 1980, 527 million in 1995, and 1133 million in 2014" (UNWTO, 2015:2). More specifically, recently, the United Nations World Tourism Organization (UNWTO, 2015:4) has proposed that "International tourist arrivals (overnight visitors) hit a record 1 133 million worldwide in 2014, up from 1087 million in 2013. Demand continued to be strong in most source markets and destinations, despite ongoing geopolitical, economic and health challenges in some parts of the world." This positive trend is also reflected in the long-term forecast of the tourism sector between 2010 and 2030 that international tourist arrivals will increase by 3% a year and emerging destinations are anticipated to gain more respectively to advanced economies (UNWTO, 2015:2). In relation to emerging destinations, for example, it has been proposed that dissimilar "from other economic activities that developed areas in competitiveness, several less developed regions also share advantageous positions in the tourism arena as worldwide popular destinations" (Yang & Hung, 2014:883).

Academic literature is also analogous in terms of the tourism trend. Tourism is proposed as one of the principal components of global industry (Thomas & Raj, 2014:26) and, contrary to other economic sectors, it continues to grow also during global recessions (Du, Lew & Ng, 2016:454). It has been also advanced that, despite potential uncertainty and misunderstanding and different interpretations, "tourism as a global phenomenon is not debated" (Smith, 2004:23). Thus, it can be summed up that, although different views on tourism are present, practically all tourism studies started by emphasising the tourism industry relevance and growth in the last decades (Fletcher, 2011:444).

Honeymoon and weddings' travels can be seen as a niche tourism sector. The literature related to honeymoon and weeding tourism is available (see Rogerson & Wolfaardt, 2015; Jang, Lee, Leeb & Hong, 2007; Seongseop Kim & Agrusa, 2005). Specifically, in relation to weddings' travel, it is stated that Arguably, over the past decade the concept of 'niche tourism' has entered the mainstream dialogue of tourism scholarship. "One little explored form of niche tourism is the specialized micro-niche of wedding tourism" (Rogerson & Wolfaardt, 2015:1). Moreover, the relevance of the niche sector can be noted since "Wedding tourism as such is a growing niche market that has impacted upon destinations worldwide as couples often travel abroad to get married or to celebrate their wedding" (Rogerson & Wolfaardt, 2015:3). However, there is a great scarcity of specific studies on honeymoon and weeding tourism, let alone, a specific geographically based market on the same topic. This paper aims to start to fill this gap in knowledge.

Since the period of transition from the Apartheid system from 1948 – 1994, to the new South Africa, international tourists' arrival, growth has been remarkable. Despite some ups and downs, international arrivals in South Africa had a notable positive increase. In 1991, South Africa received 3 896 547 foreign visitors (Statistics South Africa, 2011:16) whereas, in 2015, the country received 8,9 million international tourists (South African Tourism – SAT, 2015:17). At the same time, Italy ranks 8th amongst the top spenders in international tourism, gaining one position compared to the previous year (UNWTO, 2015:13). Therefore, while both South Africa, as a destination, and Italy, as a source market, seem to bear their own positive landscape, it is interesting to investigate the correlations between South Africa's destination and Italy's outbound tourism.

It is important to understand the destination and source market to try to find a possible link between them. Thus:

> Understanding destination types and characteristics is of paramount importance for its marketing. Each destination can only match certain types of demand and hence tourism marketers need to appreciate travel motivations in order to develop appropriate offerings and brand destinations for the right target markets. In addition, destinations should be aware not only of the needs and wants of the active demand but also of the potential markets they can attract. It can then develop a product portfolio, which will enable the optimisation of benefits and adapt their marketing mix to their target markets (Buhalis, 2000:100).

Based on the above, this paper intends to provide an initial, and certainly not fully comprehensive investigation on the present and potential Italian tourism market in South Africa, with special attention to the Italian honeymoon travel market. Consequently, to make tourism more valuable, it is important to understand, case by case, each specific tourism market and its relation to each specific destination.

> Marketing research is used extensively by destination marketers to identify the types of customers that can be attracted (active demand), as well as the prospective visitors (suppressed demand) who do not visit for a variety of reasons. Approaching the right target market and providing the most appropriate combination of

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> local tourism products and services is the secret for successful destinations (Buhalis, 2000:103).

In this context, this paper intends to contribute to tourism marketing literature by investigating the relationship between the Italian tourism market and South Africa, as a destination, so that South Africa can attempt to take further advantage, or try to break some possible new avenues, to attract more Italian tourists. This article specifically focuses on the Italian honeymoon travel market. South African Tourism, ten years ago, presented the first edition of *Marketing South Africa in Italy* (SAT, 2010). The document *Marketing South Africa in Italy* (SAT, 2010) seems not to have anything specifically related to weeding and honeymoon tourism.

This paper does not intend to enter into the debate about the role of tourism in development as such, but it recognizes that the same “debate on whether tourism is an engine of long-run economic growth not only remains unresolved but also requires expansion in terms of the depth of investigations” (Ridderstaat, Croes & Nijkamp, 2014:479). The article is based on desk research and as such, made use of academic journals, books, government and other organizational reports and publications and various relevant internet sources. As a consequence of the scarcity of academic sources, a numbers of other sources were used, including websites (mostly Italian) dealing and reporting trends and news on the honeymoon and wedding market. After this introduction, a literature review will explore issues related to South Africa tourism, the Italian outbound tourism market and issues related to the honeymoon travel market. Thereafter, specific issues of the Italian tourist market in South Africa will be examined. A supplementary note on the closure of the South Africa tourism office in Italy is also presented.

Literature Review

The South African tourism landscape has vigorously changed since 1994. As such, the post-1994 Tourism White Paper (Department of Environmental Affairs and Tourism – DEAT, 1996: 8), amongst other data, indicates that, “In 1995, South Africa received just under 1,1 million overseas visitors (originating from outside Africa).” The same document (DEAT, 1996: 8) advances that “Following the democratic elections of April 1994, extremely positive growth in visitor arrivals from both the regional and overseas markets was recorded. Overseas visitors to South Africa are expected to double by the year 2000.” Ten years later, in 2004, it has been noted that “Since the first democratic elections in 1994, tourism in South Africa has changed fundamentally.

The new Government identified tourism as one of the country’s key economic sectors because of its massive potential...” (DEAT, 2004:9). The long-term (since 1994) growth in international arrivals has been substantial although up and down moments have occurred. For example, 2015 was not the best year since “South Africa’s performance was constrained in 2015...” (SAT, 2015:18). Taking into specific account the overseas tourism market, ten countries are indicated as the main South Africa source markets: “the ten leading countries for overseas tourists in 2015 were: The United Kingdom (UK), 407 486 (19,0%); United States of America (USA), 297 226 (13,9%); Germany, 256 646 (12,0%); France, 128 438 (6,0%); The Netherlands, 121 883 (5,7%); Australia, 99 205 (4,6%); China, 84 691 (3,9%); India, 78 385 (3,7%); Canada, 56 224 (2,6%) and Italy, 52 377 (2,4%)” (Statistics South Africa, 2016:13). While the Italian market it is not the main market, it still represents a satisfactory market size that, if understood in its dynamics and segments (such as honeymoon market segment), could be exploited to attempt to increase its value in South Africa.

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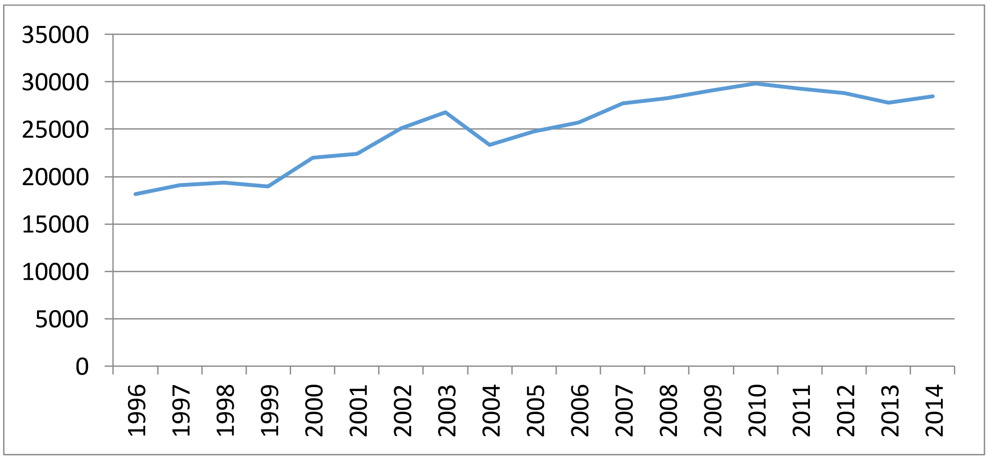
Previous academic studies concerning the Italian outbound travel market are rare but they have been published (see, for example, Cortés-Jiménez, Durbarry & Pulina, 2009; Minca, 1993). The work of Minca (1993) was mostly a historical overview of the Italian outbound travel market since 1993 that considers internal and external factors influencing such a market, for instance, the Italian economic recession and the Yugoslavian war context. Instead, Cortés-Jiménez, Durbarry & Pulina (2009:563) provide "an insight on the Italian outbound tourism demand to some major destinations (namely, France, Germany, the UK and Spain) over the 1996–2005."

Currently, Italy is an important player in the global tourism source market. With US$ 29 Billion, Italy (+7%) moved up one place into 8th position in the rank of the top global spenders in international tourism in 2014 (UNWTO, 2015:13). However, in 2015, it fell down again of one position, ranking ninth with US$ 24.4 billion (UNWTO, 2016:13). Another document (OECD, 2016:207) proposes that "Expenditure by Italian outbound tourists increased from EUR 20.3 billion in 2013 to EUR 21.7 billion in 2014." Specifically, in 2014, Italian made 63 632 million trips (9.5% less compared to 2013). The average length of a trip remains stable with 5.8 nights per trip. In 2014, Italy's outbound market shows a decrease in short holidays and an increase in long stays (four or more nights), totalling 29.9 million trips. The same year (2014) also shows a decrease in domestic trips and an increase (+19.7%) in international trips – although much as a consequence of increased business trips in Europe Union countries (Istituto nazionale di statistica – ISTAT, 2015:1). While these data certainly show changeable and mixed matters, it is clear that Italy remains, up until the present time, a relevant country in international outbound tourism and its value, in spite of ups and downs, has grown in the long-term. It is interesting to note that, in the conclusion of their study, Cortés-Jiménez, Durbarry & Pulina (2009:563) suggest that "Income elasticities indicate the extent to which tourism demand will change in response to changes in the real income (budget) of Italians. Destinations like the UK and Spain tend to gain more than France and Germany. This might not be too surprising given that Italians like to venture to destinations further than just crossing the border." Graph 1 shows the trend in Italian International outbound tourists[1] (from World Bank, online) passing from 18 173 000 in 1996 to 28 460 000 in 2014.



Graph 1. Italian outbound travels (in thousands). Source: Wold Bank, online.

[1] International outbound tourists are the number of departures that people make from their country of usual residence to any other country for any purpose other than a remunerated activity in the country visited. The data on outbound tourists refer to the number of departures, not to the number of people travelling. Thus, a person who makes several trips from a country during a given period is counted each time as a new departure (World Bank, online).

A report (Tropics Tourism & Marketing Services, 2015:10) for the Pacific Tourism Organization (SPTO) mentions that the weddings' and honeymoons' tourism market fundamentally include: "tourists who travel abroad for the one or both of two specific purposes: To hold their wedding event (marriage or commitment ceremony) overseas and/or honeymoon overseas to celebrate their recent wedding event." In addition, it is possible to divide wedding tourism into short- and long-haul markets (see Table 1 for their specific characteristics).

Table 1. Global market wedding characteristics. Source: Tropics Tourism & Marketing Services, 2015:13.

Short haul weddings – its more about groups	Long haul weddings – its more about couples
Ease of Access An affordable non-stop flight with duration of no more than 3-4 hours. Available infrastructure to cater for guests. ***Time Constraints*** Limited leave and/or guests only able to travel for a few days. ***Cost*** Venues generally cheaper than in their home country and easier for guests to attend. ***Wedding Tourists*** Encourage more family and friends to travel and generate larger wedding groups.	***Status Symbol*** Looking for extraordinary photographic backdrops and exotic settings that will set them apart from others. ***Just Couples*** Weddings are mostly just couples looking for a quiet romantic location. They may have been married previously and are just a small celebration. ***Experiential*** More couples are looking to combine their wedding with other experiences and will travel further to seek those experiences. ***Less about Price*** Price is not generally a concern. The location is the major driver.

The global honeymoons' and weddings' travel market is valuable. A study (Acorn Consulting Partnership Ltd, 2008:8), from the Caribbean context, proposes that while "global data on the industry does not exist" (Acorn Consulting Partnership Ltd, 2008:81) it can be noticed that the value is relevant. For example "the US honeymoon market is reported as being worth an estimated $13.7 billion in 2007. UK citizens took 45000 weddings abroad in 2005, and, whilst a survey of UK couples showed that the majority prefer a domestic wedding, nearly all stated that they wanted to honeymoon abroad. On average, UK consumers spend $12000 on a wedding abroad, and $6000 on a honeymoon.

Overall, the global market size for weddings and honeymoons is estimated at being between 3 and 6 million trips per annum." Interestingly, the same document indicates Italy as one of the main source markets for honeymoon and weeding trips in the Caribbean (Acorn Consulting Partnership Ltd, 2008:81). Congruently, in the Pacific Island Countries (PICs) context, it has been noted that "Approximately 15-20% of arrivals into PICs who identify the purpose of their travel as holiday/vacation are wedding and honeymoon tourists" (Tropics Tourism & Marketing Services, 2015:12). It is important to keep in consideration that the global market of honeymoons and weddings is shifting. Thus, "The global honeymoon market is changing [and] honeymooners are looking for travel experiences beyond relaxing in a hammock or lying by the pool" (Tropics Tourism & Marketing Services, 2015:18).

Italian tourism market in South Africa and honeymoons'/weddings' travels

In a 1993 study (Minca, 1993:112) mentions that, at that time (1993), "Italy is presently facing one of its worst economic crises of the last 20 years and this inevitably will affect Italians' tourism expenditure in the next few years." Despite some ups and downs, and also correlated with Italian internal socio-economic contexts, the Italian tourism arrivals' market in South Africa has been meaningfully increasing over the last 10 years. More recently, "Italy showed a good performance with a 12.2% (6690) increase in arrivals, despite being one of the hardest hit economies during the global recession" (SAT, 2013:19). The 2013 Annual Tourism Report (SAT, 2014:18) proposed that "Italy showed a good performance with a

10.6% (6,472) increase in tourist arrivals, despite being one of the hardest hit economies during the global recession." These statistics indicate that, while a country specific context certainly has its relevance (and needs to be carefully considered), it is not always a determinant in the evolution of tourism *per se*.

In 2002, 47 756 Italian tourists visited South Africa, representing 0.23% market share (SAT, 2004:10). Although the increase has not been exceptional since 2002, an increase of Italian tourists can be noted. In 2010, 54 461 Italian tourists visited South Africa (see Statistics South Africa, 2015:38), whereas, in 2014, (Statistics South Africa, 2015:13) 58 605 Italians toured South Africa and, in 2015, 52 377 Italian tourists visited South Africa (Statistics South Africa, 2016:13). These figures indicate that from 2013 to 2015 - with a peak of 2014 arrivals - Italian tourists in South Africa stabilised in number and mostly remained just above 50 000 units. At the same time, the rank position of the Italian market in South Africa has changed, passing from the seventh place in 2002-2003 periods (SAT, 2004:17) to become the tenth largest market in 2015 (SAT, 2016:13). In this context, however, it is important to specifically comprehend the characteristics of the most recent/current Italian honeymoon market and relate it to South Africa so as to better understand and evaluate the possible potential of the Italian honeymoon market in South Africa.

Honeymoon trips, are a relevant sector in Italy considering that 85% of newlyweds say that they will go on honeymoon trips. In 2015, Italy been spent 5 billion Euros in honeymoon travels. It is relevant to note that Italians spent above the global average in honeymoons (between 3 000 and 5000 euros per couple against the global average of 2 874 euros). Finally, but very important in relation to South Africa, more than 60% of honeymoon makers prefer a long holiday, which is longer than the 15 days legal allowance and 76% prefer to book the travel with a travel agency (de Micheli, 2016).

The travellers' experience of more than just the typical sand and beach relaxation is gaining relevance amongst honeymoon travellers. For the last few years, more than 60% of the Italian honeymoon travellers take a long trip lasting for more than 15 days. There is an increasing interest among honeymoon travellers to undertake overseas trips that combine relaxation with a historical-cultural association. The trip becomes an occasion to discover new places that may not be possible in a normal holiday (Tournour-viron, 2010). This type of holiday seems preferable among new trends in honeymoon travels in South Africa.

South Africa's offering of nature reserves, wild life and cultural attractions are well positioned to attract this tourism segment. It is not a coincidence that the first three drivers to visit South Africa for Italian visitors are beautiful scenery (75%), experience a different culture (57%) and safari experience (45%) (SAT, 2010:85). In 2015, out of 52 377 Italians visiting South Africa, the purpose for 49 094 visitors was for a holiday, 2 902 for business and the remaining 381 for study purposes (Statistics South Africa, 2016:51). Italian travellers to South Africa when viewed by activity for the period between 2003 and 2008, showed the following three preferences: natural attractions (219 000 tourists); wildlife (205 000 tourists); and cultural historical and heritage (153 000 tourists) (SAT, 2010:73).

These new trends in Italian honeymoon travellers are visible in the relevance of South Africa as a honeymoon tourism destination for Italian couples. It has been since 2010, that South Africa is listed amongst the top seven most requested destinations (or types of travel) for Italian honeymooners (Tournour-viron, 2010). The year 2009 was proposed a period that South Africa, together with Japan, was imposing itself as a main destination for Italian honeymoon travellers (Palladino, 2010). Again, in a 2012 article, South Africa was chosen by 8% of total Italian honeymoon trips (Cosimi, 2012). The Italian internet site Nozze (wedding) advisor (Nozze advisor, online) ranks South Africa amongst the 8th preferred destinations for honeymoon trips for 2017 indicating that a holiday in South Africa includes a combination of history, nature and modernity, which give a unique experience. The website Wedding Tips Guide identifies South Africa as the 'perfect' honeymoon destination and a current trend – in 2016 (Wedding tips, 2016).

The positive link between the Italian honeymoon market and South Africa tourism indicates a possible valuable niche market that South Africa could enhance and exploit still more of what it is probably already doing. Destinations should be understood in all their attributes. Thus, "A destination's attributes can be classified into two major categories The primary category includes innate characteristics such as climate, ecology, natural resources, cuisine, culture, and historical architecture. The secondary characteristics are built or introduced by the public or private sectors, such as hotels, resorts, catering outlets, transportation, and entertainment (Seongseop Kim & Agrusa, 2005:887).

South Africa, in the honeymoon milieu, has been noted as having history, culture, and nature together with tradition, modernity and dynamism (Nozze advisor, online). Hence, South Africa has both sets of attributes that positively match what Italian honeymooners wants and desires. As expressed by a honeymoon travel specialist travel agency in relation to 2017 honeymoon travel trends, South Africa (with Namibia), after a couple of years in the shadows, is passionately re-emerging, thus proposing unique travel experiences for the world with its pleasing nature and the superb quality of the services on offer (Destinazione Viaggio Di Nozze, online). South Africa could advance specific marketing strategies towards the Italian honeymoon market that will emphasize honeymoon specific packages, discount and so on to enhance its position as a honeymoon destination for Italian couples. The matching of the three components in the Italian honeymoon market, the Italian sentiment towards South Africa and South African tourism products and services should be seen as an opportunity not to be missed. It can be also noted that, beside the positive length of stay and expenditures in honeymoon trips, the market is evolving and more opportunities are arising so that "An important segment tourism operators, NTOs and tourism marketing agencies should not discount is the "second honeymoon" or "anniversary market" for couples wishing to celebrate their ongoing union. This opens up another demographic that is generally older, more financially secure and more able to travel internationally for longer periods." (Tropics Tourism & Marketing Services, 2015:17).

A supplementary note

In the web page of the Department of International Relations and Cooperation's (DIRCO) of the Republic of South Africa, the relationship between Italy and South Africa has been described as 'excellent' and "covering the full range of activities, both on a governmental level as well as in the private sector" (DIRCO, online). The same Government Department also mentions that "Italian tourists are described as attractive clientele with the following characteristics: enjoy long stay travel (10-15 days), educated, middle to upper class and seek high quality services. These characteristics normally translate into higher per capita expenditure" (DIRCO, online). Nevertheless, the same source (DIRCO, online) later points out that: "Tourism from Italy may still be undervalued by South African tour operators and this area could in the next few years potentially play an increasingly significant role in relations with Italy. Investment by Italian companies in the tourism infrastructure of South Africa may also bear fruit in the future" (DIRCO, online). This propositions seems, however, to go against the recent closure of the South African tourism office in Italy (southafrica.net, 2016 a). It is proposed that (southafrica.net, 2016 a):

> South African Tourism is continuously exploring better operating models to reduce overheads and improve its marketing efficiencies, as well as return on investment in markets. It has thus continued to reprioritise its market portfolio as well as its

> marketing operations through the hub model. The hub strategy is part of the strategic intent to maximise the marketing spend in the markets South African Tourism operates in. A South Europe hub has been established to service the France and Italy markets, with the office based in Paris. We therefore no longer have an office in Italy, closed effective 31 May 2016. Italy is South Africa's fifth biggest source market in Europe, and remains an extremely important market. This model will allow us to be more efficient in supporting the trade selling our beautiful country without the cost of a physical office. In this regard, an Italian based representative will be appointed to ensure that the trade work continues in that market. Other support functions will include the PR agency that will continue with the important media work in this crucial market.

A new agency has been appointed to take care of South Africa tourism in Italy (Southafrica.net, 2016 b). While the capacity of the appointed agency is (in this paper) not investigated or questioned, doubt may arise from the possibility that the appointed agency will not have only South Africa tourism as its primary interest. The appointed agency website shows that, beside South African Tourism, the agency has other clients to take care, clients that not necessarily see South Africa as their exclusive area of interest (see JoyCo', online). The possible risk is that the absence of a team that is fully (100%) dedicated to South Africa is now absent. Instead, a private company, without arguing its capacity, has as a main interest (possibly understandable from a private company perspective) the company itself and the taking care of *all* its current and future clients, instead of dedicating its effort only to South Africa Tourism. In this context, the specific focus on the Italian honeymoon travel market for South Africa could suffer a blow and a possible valuable opportunity could be jeopardised if proper strategies are not engaged.

Conclusion

This article, which has been based on desk research, aimed to open a debate and start an investigation into the specific relationship between the Italian tourism outbound market and South Africa, with specific reference to the honeymoon travel market. The article suffers a limitation however, which is related to the scarcity of data and studies available on the honeymoon market a such. Therefore, the article also indicates that more research and more data are required to better understand this specific research topic. These limitations surely open opportunity of new research.

Following the introductory context, the article has explored matters about South African tourism, the Italian outbound market and the honeymoon travel market. A section on the Italian tourism market in South Africa, with specific reference to honeymoon travels, has been presented. The study shows that specific characteristics of the Italian honeymoon travel market match with the South African tourism offering. The recognition that South Africa currently ranks as a major destination for Italian honeymooners shows that the matching between market and offering is, currently, very positive, and certainly should be more thoroughly investigated and exploited by the South Africa tourism sector. The matching of the three components, i.e., the Italian honeymoon market, the Italian sentiment towards about South Africa and South African tourism products and services should be seen as an opportunity. The recent closure of the South African Tourism office in Italy opens possible weaknesses about the specific efforts that could be implemented towards the specific focus on the Italian honeymoon market by the South African tourism sector.

More research is essential as this field seems very much understudied despite its possible value. At the same time, it is suggested that South Africa Tourism should specifically advance strategies related to the Italian honeymoon travel market and, supposedly, also investigate other countries' source markets. This could be a 'small' but valuable niche market that can be enhanced to become more important in the South African tourism landscape and greatly bolster foreign direct investment.

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