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The making of the South African timeshare industry: spatial structure and development challenges

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Abstract. Research on the accommodation sector attracts only a small fraction of contemporary tourism scholarship relating to sub-Saharan Africa. This paper contributes to this expanding literature on segmentation and the accommodation sector in South Africa. Specifically, it examines the establishment and making of the timeshare industry as a distinctive form of accommodation within the national tourism economy. The timeshare industry in South Africa is the largest and most mature in sub-Saharan Africa and among the most important in the developing world. The analysis uses a longitudinal perspective in order to interpret the emerging spatial organisation and evolving structural issues that impacted upon the development of the timeshare industry in its formative years from 1978 to 2002. The study addresses a knowledge gap around the minimal pursuit of historical research within the existing international literature about timeshare.

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1. Introduction

The establishment of an accommodation infrastructure is one of the central prerequisites for the development and competitiveness of any tourism destination. In particular, within the context of tourism economies in the developing world the making of an accommodation infrastructure is an essential building block for initiating tourism growth (Magombo, Rogerson, 2012). In order for the long term scaling-up of tourism in the developing world the World Bank (2012) considers there is a need for the diversification of the supply of tourism products including accommodation services. Over the past two decades one of the most striking trends in the global accommodation economy is the shift towards segmented markets which evolved to cater to different consumer demands (Dev, Hubbard 1989). Hospitality enterprises have broken down consumer markets into a number of basic segments of specific consumer preferences and evolved products to cater directly to individuals within these segments (Berger, Chiofaro Jr., 2007; Rogerson, Kotze, 2011).

Historically, whilst early forms of tourism accommodation often were restricted to basic inns, simple boarding houses or standard hotels, in recent decades as a consequence of segmentation the number of different types of tourist accommodation offerings has mushroomed. The hotel industry has become increasingly differentiated with the establishment of an array of hotel types from full service hotels, limited service and budget hotels, all-suite hotels, apartment hotels, extended stay hotels, airport hotels, luxury hotels, boutique hotels and even Sharia-compliant hotels (Rogerson, 2010). Beyond the hotel sector a range of alternative types and varieties of tourist accommodation also has evolved. Timothy and Teye (2009) point to the array of 'new lodging phenomenon' which are part of modern tourism destinations including of bed and breakfasts, guest lodges, farm stays, homestays, safari lodges, motels, backpacker hostels, caravan parks, second homes, and timeshare forms of accommodation. Research into the changing structure of the accommodation sector is an important and growing topic for tourism scholars including for tourism geographers of Africa (Rogerson, Visser 2011; Rogerson, 2012). In one early review of African tourism scholarship by Hyma et al (1980: 543) it was urged that further research was required into the locational attributes of the accommodation sector. Three decades later research on the accommodation sector attracts only a small fraction of tourism scholarship relating to sub-Saharan Africa (Rogerson, Rogerson, 2011).

Arguably, the greatest changes in tourism accommodation sector in sub-Saharan Africa are to be observed in Africa's most mature tourism destinations. In the case of South Africa the landscape of tourism accommodation has been shifting markedly over the past 50 years as accommodation providers responded to the challenge of segmenting markets as a basic underpinning for enterprise competitiveness and of the need to cater to shifting consumer demands. The pace of change in the national accommodation sector has been especially rapid with the advance of globalisation and the country's re-insertion in the international tourism economy since 1994 (Rogerson, 2013a, 2013b). In essence the impact of segmentation is evidenced in the appearance of a range of different kinds of accommodation offerings across the country. Within recent scholarship of both tourism and urban geographical studies a number of investigations have been undertaken to track aspects of this changing panorama of accommodation services in South Africa (Visser, Hoogendoorn, 2011; Visser, 2013; Visser, Rogerson, 2014). In particular, the hotel sector, which has experienced the most dramatic shifts in organisation and geography during the past two decades, is the focus of several rich studies documenting both national and local trends of differentiation (Rogerson, 2010, 2011, 2011a, 2011b; Rogerson, Kotze, 2011; Rogerson, 2012a, 2012b; Rogerson, Sims, 2012; Rogerson, 2013a, 2013b, 2013c, 2013d; Ferreira, Boshoff, 2014; Rogerson, 2014a, 2014b). Other accommodation-focused research in South Africa has explored aspects of the new phenomenon of guest houses, backpacker hostels, bed and breakfasts, safari lodges and of the distinctive township guest house (See Visser, Van Huyssteen, 1997, 1999; Massyn, Koch, 2004; Rogerson, 2004, 2007). In addition, the development and local impacts of second homes, a form of accommodation that has an extended history in South Africa, as well as its change and expansion have come under close academic scrutiny (Visser, 2003; Hoogendoorn et al., 2005; Pienaar, Visser, 2009; Hoogendoorn, Visser, 2011; Hoogendoorn, 2011).

This paper contributes to this expanding literature on segmentation and the accommodation sector in South Africa. Specifically, it examines the establishment and making of the timeshare industry as a distinctive form of accommodation within the national tourism economy. The timeshare industry in South Africa is the largest and most mature in sub-Saharan Africa and currently among the most significant in the developing world (Pandy, Rogerson, 2013a, 2014). In terms of research approach the analysis adopts a longitudinal perspective in order to interpret the emerging geography and evolving structural issues that impacted upon the development of the timeshare industry in its formative years from 1978 to 2002. Situating the paper it must be understood as addressing a knowledge gap around the sporadic pursuit of historical research within the existing corpus of international scholarship about timeshare (see Pandy, Rogerson, 2013b). In addition, the paper represents a modest response to local calls which have been sounded for more in-depth historical investigations into the tourism economy in general and of the changing accommodation landscape of South Africa in particular (Rogerson, 2013d).

2. Timeshare – an international perspective

It has been argued that timeshare ownership is a relatively recent leisure phenomenon and new kind of tourism accommodation (Kaufman et al., 2006; Uphurch, Lashley, 2006). Although different definitions are set forth the term timeshare essentially describes the practice of dividing accommodation units into (usually) weekly increments, intervals or parcels which are sold to consumers (Zacharatos, Stavrinoudis, 2009). Indeed, according to Cesaret et al. (2013: 1) timeshare or vacation ownership "is a form of ownership or 'right to use" of a resort property for a specific time period (usually a week) each year".

As an accommodation product the origins of timeshare are usually positioned in the 1950s with slow growth subsequently taking place out from its original heartland of Western Europe (Liu et al., 2001; Hahm et al., 2007; Timothy, Teye, 2009). According to one recent investigation since its genesis in Europe the timeshare industry "has enjoyed a "healthy growth worldwide" with major developments occurring in the United States particularly in the state of Florida (Cesaret et al., 2013: 2). A watershed event in the international development of the timeshare industry was the establishment in 1975 of Resort Condominium International (RCI) which became the first enterprise to offer exchange programmes to its members and thus facilitate opportunities for members to customise their leisure experiences and experience new destinations by engaging in timeshare exchange (Sparks, Smith, 2010). Hitchcock (2001: 231) maintains that despite its origins in Europe, it was in the United States where timeshare "burgeoned, especially after the introduction of the exchange function in the mid-1970s". Within the spectrum of tourism accommodation the timeshare industry is a distinctive segment. Over time, however, the timeshare product evolved in relation to shifting consumer preferences and the rapid segmentation of tourism accommodation products as a whole. Innovation and change of the product has been one of the hallmarks of the timeshare industry (Haylock, 1994a, 1994b; Upchurch, Gruber 2002; Kaufman et al., 2006; Powanga, Powanga, 2008). Gregory (2013: 1) observes the industry "has been evolving from single site developments of condominiums to purpose-built resorts and vacation exchange systems supported by elaborate points based systems that facilitate trade of a variety of travel related products".

From precarious beginnings therefore the timeshare industry emerged as a profitable and dynamic branch of property development (Pandy, Rogerson, 2014). Its growth potential was recognised by many international hospitality enterprises including Disney, Four Seasons, Hilton, Marriott, Radisson, Ritz-Carlton, Starwood and Wyndham (Cesaret et al. 2013). The expansion into timeshare of these major corporations accorded considerable credibility to the timeshare product and was accompanied by substantial sales growth and new resort development. Nevertheless, during the 1980s despite it increasing more rapidly than other forms of accommodation, Hawkins (1985) cautioned for the need for timeshare to improve its image. One continuous thread in industry development is linked to high pressure sales and marketing practices which caused the negative image of the timeshare industry (Gregory, 2013). This said, during the 1990s timeshare was styled as "the new force in tourism" (Haylock, 1994b) and by the early 2000s Upchurch and Gruber (2002) described the industry as a 'sleeping giant'. Currently, the timeshare segment is viewed as one of the most rapidly expanding segments of the contemporary global tourism economy (Sharma, Chowdhary, 2012). According to one recent investigation timeshare ownership is a continually increasing market for the real estate sector or property development (Deng, 2013). For Sparks et al. (2011: 1176) timeshare now represents "a significant portion of the tourism accommodation industry worldwide". From its roots in Western Europe, timeshare is thus a global phenomenon with new frontiers of expansion recorded as including China (Liu et al. 2002) and India (Sharma, Chowdhary, 2012; Shrivastava, 2013).

Notwithstanding the global rise in importance of timeshare products this segment of tourism accommodation has failed to attract the volume of detailed scholarly attention that has been devoted to other forms of tourism lodging such as hotels, bed and breakfasts, second homes or homestays. In the early 2000s despite the rapid growth of the timeshare sector Liu et al (2001: 88) contended that "studies on timeshare are relatively few". During 2007 Hahm et al. (2007) bemoaned the fact that in the Caribbean, one of the fastest growing regions for resort development, "there has been very little academic research conducted on the timeshare industry". In a more recent wider overview of the state of the art of international scholarship on timeshare Zacharatos and Stavrinoudis (2009: 3) consider the research literature as limited. This assessment is confirmed by other recent observers. Stringam (2010: 38) argues that scholarship on timeshare and vacation ownership is "sparse". Cortés-Jimenéz et al. (2012: 155) view material as "relatively scarce" and Gregory (2013: 1) describes the condition of research as "limited". Arguably, there is geographical unevenness in patterns of scholarship. Currently, most material relates to timeshare developments and industry issues in advanced economies. The largest amount of writings on timeshare concerns its development and consumers in North America or Western Europe, the two leading regions for timeshare in the world. Outside of these areas much less work is available on the development of timeshare and of its relationships to tourism more broadly (see Pandy, Rogerson, 2013a, 2014).

Thematically, most academic work about timeshare is about consumer behaviour, service quality and marketing (Chiang, 2001; Rezak, 2002; Crotts, Ragatz, 2002; Crotts et al. 2005; Upchurch, Rumpf, 2006; Upchurch et al., 2006; Thomas, 2010; Cortés-Jimenéz et al., 2012; Gregory, 2013). Issues pertaining to consumer satisfaction with timeshare are another critical vibrant focus of work (Weaver, Lawton, 1998; Pollard, 2010; Sparks et al., 2011; Bradley, Sparks, 2012). The dominance of these research foci is inseparable from the fact that many researchers are responding to the core needs of the industry in terms of boosting sales for timeshare products and understanding consumer decisions to rescind purchase of timeshare (Rezak, 2002; Sparks et al., 2014). In addition, the major attention devoted to timeshare marketing is associated with the negative feelings that consumers internationally often have with timeshare because of dubious selling practices by certain companies which have scarred the image of the industry (Hawkins, 1985; Gregory, 2013). The emphasis given to timeshare marketing issues and of building "consumer acceptance" essentially underscores the fact that for the international timeshare industry "the historically questionable image of the product" is a matter of "high concern" (Stringam, 2010: 38). The identification of new market segments or niches for the timeshare product has been another issue under scrutiny (Kaufman et al., 2006).

Beyond marketing considerations other writings on timeshare have centred on service related issues of resort management (Hicks, Walker, 2006; Upchurch, Lashley, 2006), timeshare governance (Singh, Hurwitz, 2006), and the position of timeshare owners in tourism planning (Huang et al. 2010a, 2010b). Overall, it can be argued that the academic literature on the timeshare industry has made progress (Cortés-Jimenéz et al., 2012). Nevertheless, many investigatory gaps remain. In particular, for tourism geographers the timeshare industry is an untilled field with almost no writings concerning the spatial patterns of resort evolution, local impacts or the structural development of the timeshare industry within particular countries.

3. The making of timeshare in South Africa

The evolution of the timeshare industry in South Africa will be examined here from the period of the late 1970s, when the first timeshare resort developments are launched, to 2002 which marks the end of the developmental period of timeshare resorts in South Africa. After 2002 no new resort development occurs of new timeshare properties in South Africa (Pandy, Rogerson, 2013c). The discussion builds upon a range of source material, including a rich set of original primary source material collected from industry sources, the financial press, unpublished grey material in the form of dissertations which interrogate certain aspects of the timeshare industry in South Africa (Haasbroek, 1984; Hatley, 1990; Mania, 2008), and finally a number of key stakeholder interviews.

3.1. Resort growth and spatial distribution

Figure 1 affords a profile of the growth trajectory of timeshare property developments in South Africa from 1978 to 2002 (Pandy, Rogerson, 2014). It reveals an uneven pattern of growth across these years with an early development phase of the industry from the late 1970s to 1983 when the first resorts were established, to a seven year phase of rapid development from 1983 to 1990 when there occurred a burst of new development of timeshare resorts to a much slower phase of development from 1990 to 2002 when the last of South Africa's timeshare resorts was completed. The latter is termed here the consolidation phase of the industry. Between 1978 and 2002 the geography of timeshare tourist accommodation in South Africa was clearly established. Indeed, as the majority of all major timeshare construction and development had been completed by 2002 the timeshare industry in South Africa was spatially fixed by that date. Since 2002 the industry focus has been upon property refurbishment, upgrading or expanding of existing timeshare resorts rather than construction of new resorts (Pandy, Rogerson, 2013c).

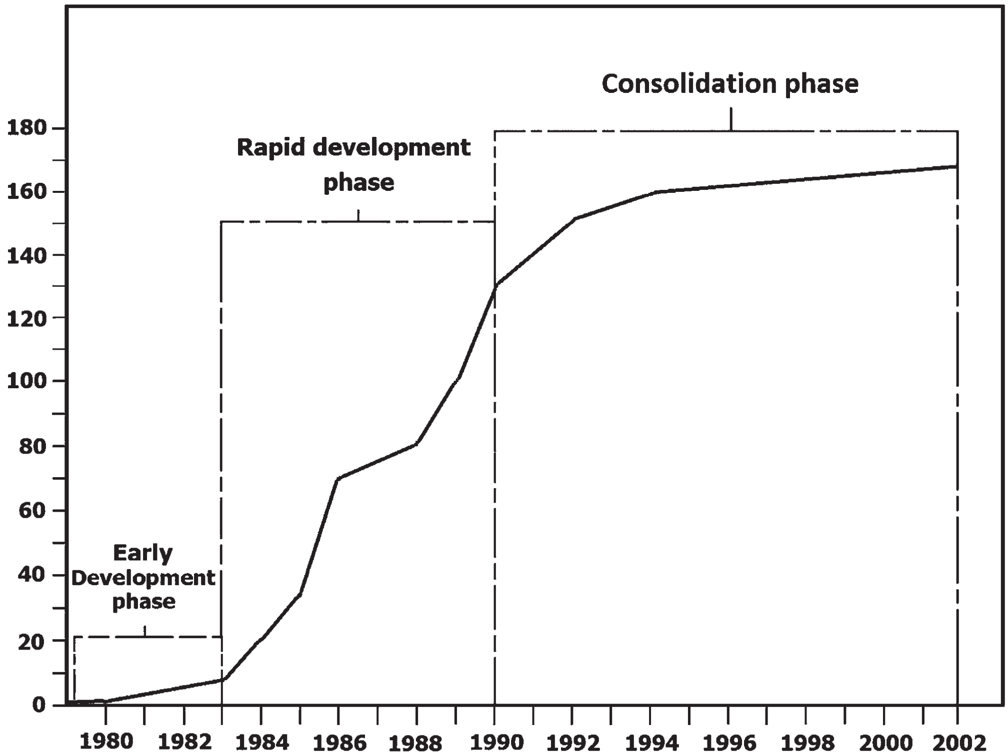

Fig. 1. The Growth of Timeshare Developments in South Africa from 1978 to 2002

Source: Authors

The critical importance of location for the success of timeshare resort development was recognised early by developers. The emerging geography of timeshare development in South Africa has been etched by four main factors. First, the location of the country's first resorts was influenced by the need for all year round sales and occupancies, a consideration which favoured areas such as the Natal coast. As timeshare projects require year round sales resorts were focused in coastal areas that enjoy good year round weather or climate in order to facilitate year round sales. Second, developers favoured the establishment of timeshare resorts at destinations where tourism was already well-established as this lessened risk and reduced sales and marketing costs. By offering timeshare either in custom-built resorts or conversions of existing accommodation at established coastal resorts, local developers did not have to create a tourist market for their product rather they tapped existing markets. Three, as the majority of timeshare sales are undertaken to consumers resident in large urban or metropolitan areas it was essential to locate resorts in accessible locations. Overwhelmingly the core market focus for the timeshare industry in South Africa was the country's economic heartland based upon Johannesburg, Pretoria and surrounds. Subsequent resort developments were targeted at the Cape Town and Western Cape consumer. Finally, as a large proportion of the timeshare developments in South Africa were conversions from already existing tourist accommodation developments, in many instances the specific location of many individual resorts or developments was determined by prior location decisions made by hotel property developers. These four sets of locational issues underpin the changing patterns of timeshare resort developments in South Africa over the quarter-century period 1978 to 2002.

The spatial pattern of the earliest timeshare resort developments in South Africa reveals that "nearly all successful projects are located at popular holiday resorts which normally draw large numbers of vacationers" (Haasbroek, 1984: 28). It was argued that the locational logic of situating initial timeshare developments in successful resorts was that "the timesharing developer need not worry about creating demand for a project in an unproven or remote area" (Haasbroek, 1984: 28). Accordingly, in the early phase of timeshare development, localities such as Durban, Umhlanga Rocks and Plettenberg Bay, which were core destinations for (white) domestic tourists, emerged as the initial foci for timeshare development. Another reason for the clustering of resorts particularly in the Natal coastal area relates to geographical access to the major inland consumer markets of Johannesburg. Spatial choices were for resort developments at coastal beach areas rather than inland locations and a 'bush' experience. In particular, coastal areas of Natal around Durban, South Africa's premier domestic tourism destination, was the preferred area for resort development.

Figure 2 maps out the geography of timeshare resorts in 1984. Spurred on by timeshare's rising popularity and high sales figures in developments at coastal Natal, several developers (large and small) entered the timeshare industry in this growth phase. With a large number of developers choosing to focus on continuing development along the Natal coast the dominance of the coastal Natal region was reinforced. Timeshare development projects were initially close to Durban, including Umhlanga Rocks, but as prime beachfront locations and property prices became increasingly more expensive, timeshare resorts spread out along the Natal North and South Coast. The period of rapid growth of the industry was spatially concentrated by new property investment as well as conversions of property in and around Durban and surrounding the North Coast and South Coast. By 1984, however, there were signs of the diffusion of timeshare resort development into other parts of South Africa, most notably into coastal areas of the Western Cape, most importantly at Plettenberg Bay and along the Garden Route. Much of these developments were targeted not only at the traditional markets of Johannesburg and Pretoria but also at consumers from the Western Cape. Beyond coastal locations, by 1984 a number of interior locations in South Africa became a new focus for timeshare property developers. The natural beauty and high amenity value of the Drakensberg mountains attracted three resort developments by 1984. Other new locations were resorts that sought to attract domestic tourists based in the economic heartland to bush or safari locations, most notably in the Pilanesberg area which was attractive because of the nearby lure of gambling at Sun City. Other resort developments were opened close to the Kruger National Park.

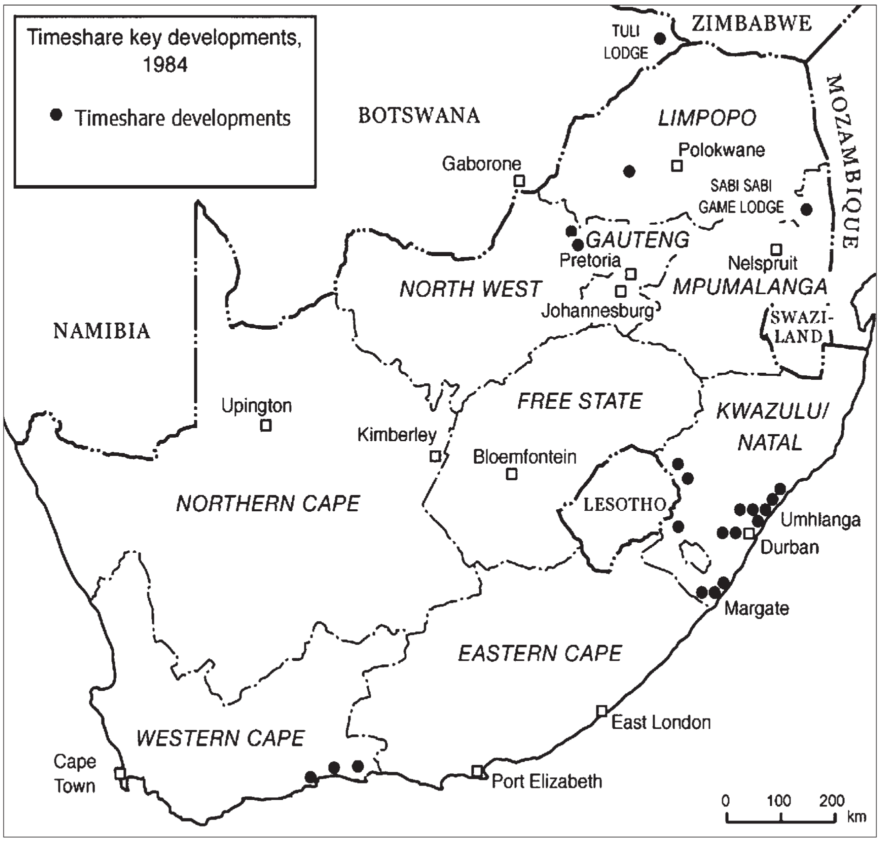

Fig. 2. Expanding Timeshare Developments by 1984

Source: Based upon data from RCI and Interval International websites

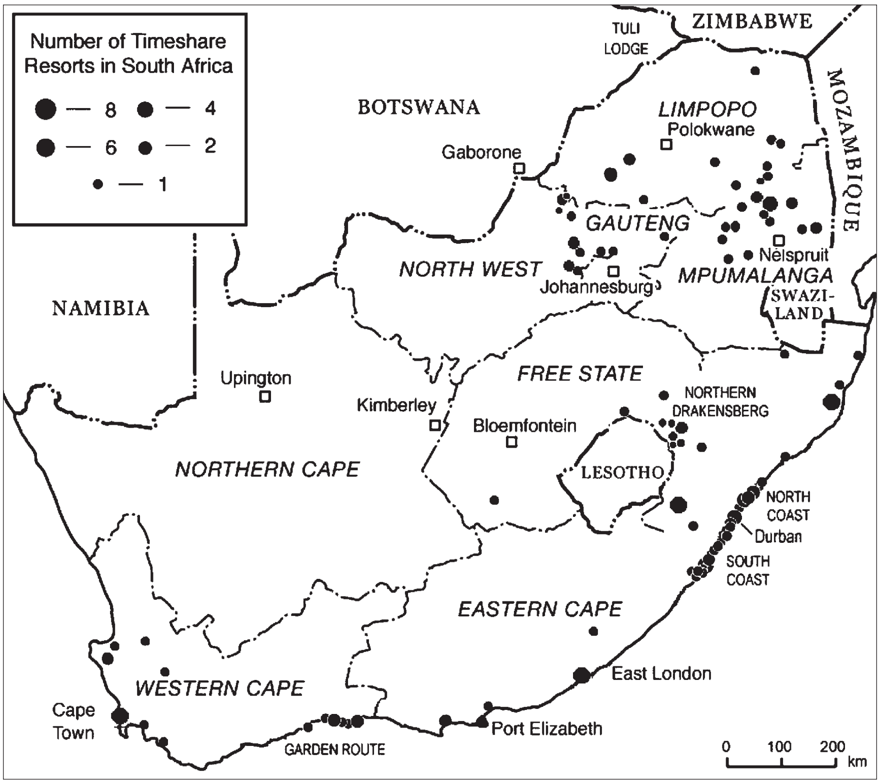

Fig. 3. The Location of Timeshare Resorts in South Africa, 2002

Source: Based upon data from RCI and Interval International websites

The geography of South Africa's timeshare industry was completed by 2002. During the 1990s with a slowing of new developments the spatial distribution of timeshare resorts development changed marginally. The dominance of resort development in coastal locations was reinforced such that by 1990 there was a total of 100 resorts at coastal sites, mainly in Natal but with a later burst of development and a cluster of resorts along the Garden Route. By 2002 it is observed that the major cluster of resorts occurs in South Africa's coastal areas particularly in and around the city of Durban, Natal North Coast and South Coast and spreading along the Garden Route. Of note, however, is the opening of resorts in the coastal cities of Cape Town, Port Elizabeth and East London. In the case of Cape Town the origins of some timeshare property was related to the market of business tourists as well as leisure seekers. The Western Cape as a whole and Cape Town in particular was a late developing region for timeshare.

Outside of these coastal areas Figure 3 discloses the importance of safari and bush experiences with clusters of resorts occurring close to national parks. Finally, the major new resort developments occurring in the post-1990 period were at Sun City, a gambling mecca (Rogerson, 1990). Overall, the South African experience parallels somewhat the international patterns of timeshare resort developments with the location of resorts closely aligned with areas of "high amenity" (Timothy, Teye 2009: 164). The most distinctive feature of the location of South African timeshare resorts is, however, the clustering of resorts near game reserves around the area of Eastern Mpumulanga. This form of timeshare resort allows consumers to enjoy the 'bush experience' and potentially to gaze upon the country's iconic 'big 5' wild animals in protected nature areas (Pandy, Rogerson, 2013a).

3.2. The development of the industry 1978 to 1990

The origins of the South African timeshare industry during the late 1970s are rooted in a period of tourism development which was marked by a downturn in international tourism following the imposition of sanctions after the 1976 Soweto uprising. There was reliance upon the (white) domestic consumer market (Rogerson, Lisa, 2005). The previous decade witnessed the establishment of a modern hotel industry, based upon the provision of quality accommodation services and replacing liquor-dominated hotel establishments, the former backbone of the local hotel industry (Rogerson, 2011; Rogerson, 2013a, 2013b, 2013c). At a period of financial crisis in the hotel sector with the downturn and seemingly bleak prospects for international tourism the attention of tourist accommodation developers in South Africa was drawn to observe the growing popularity and rapid expansion of timeshare in the United States in the 1970s. With falling demand in the South African hotel sector significant impetus was given for new parallel product innovation in local tourism accommodation.

The launch of timeshare in South Africa was viewed as highly beneficial in that it could encourage more stable volumes of tourist flows and occupancies while also providing extra or alternative sources of income for struggling tourist accommodation developers. In the international context it is significant to observe that various types of accommodation development were part of initial timeshare projects in South Africa. Unlike the timeshare product in the USA which mostly was associated with fractional condominium ownership, timeshare in South Africa was integrated and offered a variety of different accommodation types almost from the outset. These included apartment hotels, condominium developments as well as projects which extended to the area of traditional second homes or holiday homes with the sale of timeshare involving two and three bedroom townhouses. The majority of early timeshare accommodation projects were linked to hotel management groups or operations, albeit the actual types of specific accommodation complex types which were developed exhibited considerable variation (Pandy, Rogerson, 2013b).

The period 1983 to 1990 is characterised by exceptional and rapid growth of timeshare resorts. By 1983 it was observed timesharing had become "accepted as a new method of acquiring a permanent holiday home" in South Africa with the concept of timeshare offering considerable benefits both to developers and purchasers (Haasbroek, 1984: 78). Representatives of RCI described the unfolding timeshare industry in South Africa at the time as “impressive” (Sunday Express, 21 August 1983). The burst of expansion in timeshare developments in South Africa in the period 1983 to 1990 constitutes the most rapid phase of project development. According to the records of RCI, considerable expansion was recorded in the number of timeshare resorts. The growth in the number of resorts was from eight resorts in 1983 to 20 by 1984, 34 by 1985, 54 by 1986, 70 by 1987, 81 by 1988 and reaching a total of 100 resort developments by 1989 (Finance Week, 23 November 1989).

A critical facet of this growth phase of the timeshare industry related to product diversification. By 1983 the first significant changes to the timeshare product could be observed. The establishment of the Garden Route Chalets marked one of the first instances where fixed periods of time were attached to a timeshare development in South Africa. At this development the rights to occupy luxurious chalets were sold for a period of twenty years. This timeshare project was also one of the first to exhibit product differentiation in the area of price and quality. Each unit was to be built on a minimum of a 1000 square meter property and each unit would contain its own large and well maintained garden and swimming pool. In addition, the interior downstairs of the double storey chalet consisted of a large, spacious and well-designed kitchen, dining room, large lounge area, and built-in bar area. The upstairs hosted several bedrooms designed to comfortably accommodate six people (Rand Daily Mail, 28 January 1983).

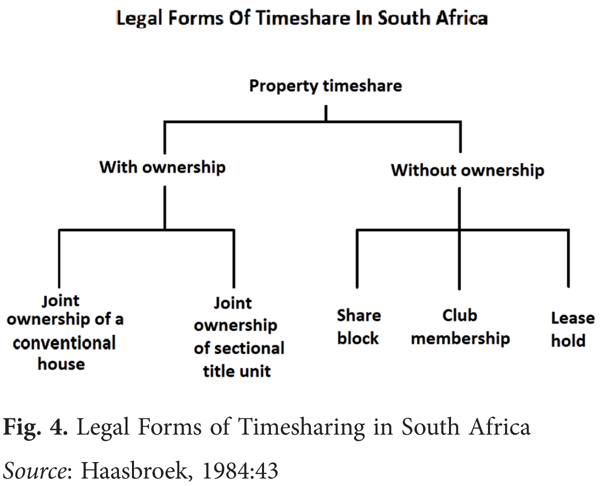

Fig. 4. Legal Forms of Timesharing in South Africa

Source: Haasbroek, 1984:43

Product diversification was reflected in other aspects of South African timeshare development. In contrast to timeshare developments taking place in other parts of the world where timeshare was sold under the legal structure of a Share Block Control Scheme, the earliest timeshare developers in South Africa mostly preferred to use sectional title based schemes. This was as a result of the fact that the country’s Sectional Title Control Act of 1971, was considered to be the most secure property legislation that allowed the development of property timesharing schemes. After 1984, however, with the introduction of South Africa’s Share Blocks Control Amendment Act, No. 15, the majority of timeshare products in South Africa were structured as share block schemes. Van der Merwe (2010) argues there are essentially six different ways for legally implementing a timeshare product. These are “joint ownership including joint ownership of units in a sectional title scheme, a share block scheme, a system based on an intermittent lease, the club method, a points based system and membership of a closed corporation” (Van der Merwe, 2010: 15). The different categories of legal development for timeshare are shown on Figure 4. In general in South Africa the Share Block method has been by far the most extensively used legal vehicle for developing timeshare products. The consensus was that Share Block schemes were considered the most ‘user friendly’ legal vehicles to apply for developing a timeshare product.

In common with the experience of early timeshare resort development in the USA, in South Africa the expansion of timeshare projects precipitated the entry of a host of what would be described as unwanted developers that ultimately gave the industry a bad image. In the context of the USA Terry (1994: 327) wrote of “self-inflicted wounds”, a description that could be applied to South Africa. The initial timeshare developers were longstanding, reputable, well-capitalized and experienced enterprises. But with rapid growth a number of less reputable, often inexperienced and undercapitalized developers entered the timeshare scene. These so called ‘fly-by-night’ or ‘cowboys’ were attracted to the industry by the lure of large and quick profits that might be extracted from the sale of individual timeshare units rather than other types of commercial property development. Unscrupulous developers sought to make quick profits and then move on leaving legitimate and committed industry players to deal with the unwanted issues they created. It was estimated by the beginning of 1983 that between ten and twenty 'bad' developers entered the industry (Rand Daily Mail, 24 August 1983).

The activities of this group of developers prompted a growing lobby for industry regulation. Legislation was enacted and enforced in March 1984. By 1984 industry observers were expressing concern about a number of so-called "irresponsible schemes" established by undercapitalized and inexperienced property developers which were "giving timeshare a bad name" (Sunday Times, 3 June 1984). It was feared that, if not properly regulated, the South African timeshare market could face the same damaging issues that had become associated with timeshare in the United States, Europe and Australia, where scams and scandals were widespread (Terry, 1994). On 1 March 1984 the Property Time-sharing Control Act came into effect to control timesharing (Haasbroek, 1984: 56). The legislation was overseen by a subcommittee consisting of key timeshare developers under the guise of the South African Property Owners Association (SAPOA). The Act specifically addressed several fundamental elements of timesharing that required regulation (Mania, 2008). In order to safeguard against reckless and undercapitalized developers involved in a timeshare development and to protect perspective purchasers of timeshare, the Act stated that developers were not allowed to use funds generated from the sale of units as a means of raising capital in order to build timeshare development units. Further with accusations of false or misleading advertising of timeshare the Act stipulated that all timeshare advertising contain the following information; a description of the type of accommodation being sold had to be provided, the legal basis upon which the scheme was based; the number of calendar years for which the scheme would run; and, the date by which the timeshare scheme was to be completed and operational. In terms of sales contracts the Act stipulated that all contracts were to be written in a clear and unambiguous language and that no agreements of sales would be considered lawful unless contained in writing. Finally, in order to protect consumers, it was required that information be disclosed concerning the management of the timeshare scheme as well as facilities to be incorporated in projects (Mania, 2008).

By 1984 South Africa's timeshare industry was described as the fastest growing in the world (Rand Daily Mail, 11 January 1984). Because of the boom in timeshare projects most property developers were uninterested in building traditional forms of tourist accommodation such as hotels because of their relatively poor returns and high running costs. The conversion of many hotels and other tourist accommodation lodgings to timeshare products, however, attracted the concern of national government. It was made clear that its interest in the industry was not about bad developers tarnishing the industry's image rather that timeshare developments directly conflicted with government plans for national tourism promotion (Rand Daily Mail, 30 November 1985). The increasing focus of government planning for tourism was upon promoting international rather than domestic tourists, which formed the bedrock market for South African timeshares. The attraction for government of boosting international tourism was that it generated much needed foreign exchange which the increasingly isolated apartheid government desperately needed in order to pay for the import of essential foreign goods (Grundlingh, 2006). With conversions and new developments of timeshare resulting in the usage of tourist accommodation almost exclusively by domestic tourists, government concerns mounted. Speaking at the South African Property Owners Association (SAPOA) timeshare convention the country's Deputy Minister of Economic Affairs and Technology described the increasing growth of timeshare as "disturbing" (Rand Daily Mail, 30 November 1985). It was stated: "A potential danger is that much valuable foreign exchange may be lost because foreign tourists cannot be accommodated in these hotels, many of which are situated in the most scenic parts of South Africa" (Rand Daily Mail, 30 November 1985). Notwithstanding such expressions of concern, no direct policy action was taken by government to arrest the continuing trend for timeshare conversion. One government policy change, however, did seriously impact the industry in an unintended way. In 1988, the Transvaal Department of Education amended the dates and durations of the province's school holidays with the consequence that many timeshare purchasers or consumers who had paid "for peak weeks" during the school holidays were now left with less desirable weeks in the middle of the new school term.

Although concerns were often raised about 'over-development' of timeshare properties these were largely ignored by both timeshare developers and planners. Between 1984 and 1986 the addition of new stock in the South African timeshare industry reached a point that for the first time the supply of timeshare weeks and accommodation outstripped demand (Rand Daily Mail, 27 July 1984). The availability of large amounts of unsold stock had serious consequences. Large excess amounts of timeshare weeks served to greatly increase competition between developers looking to sell their respective projects and which forced purchase prices down. Further, as sales and market penetration increased, project sales and marketing costs escalated and, with individual timeshare schemes or projects not fully sold out, a number of developments and developers faced failure or liquidation (Sunday Times, 26 February 1984). Indeed, while more than thirty developers were involved in the industry by 1985, only seven were estimated to have positive cash flows and only three reported to be making substantial profits at the time (Rand Daily Mail, 27 July 1984). Within this environment of intensified competition and overdevelopment, the role of sales and marketing grew increasingly important. During 1984 it was estimated the total market in South Africa for purchase of timeshare numbered roughly 330 000 households. At the time, the entire potential target market was composed of white South Africans as under the apartheid Group Areas Act Black South Africans were prohibited from occupying the same facilities (Rand Daily Mail, 27 July 1984). Aggressive sales tactics and marketing campaigns were introduced to expand market sales during the 1980s. During this period of expanding sales the Southern Sun Timesharing group emerged as a lead player and most dominant timeshare developer in South Africa with a controlling interest of between 38% and 40% of all national timeshare sales.

In order to ensure the continuous and consistent sales growth of timeshare in South Africa throughout the 1980s, developers, along with sales and marketing groups, sought to change and improve the product of timeshare in order to ensure that the product stayed relevant and marketable. One stimulus for new product development had been the changes in school holidays introduced by the Transvaal Department of Education. One consequence was that the basic timeshare product, involving the sale of a fixed week of occupation, came under "scrutiny" (Sunday Times, 19 August 1986). For the timeshare industry in South Africa "the pressure to meet the demands of an increasingly sophisticated market" triggered the establishment of a new timeshare sales product known as flexi-weeks (Business Day, 7 December 1988). This product innovation involved timeshare units or weeks being divided into periods of peak and low season and then sold to consumers.

Robust levels of sales of timeshare were recorded throughout the 1980s with sales of R100 million and R 150 million respectively in 1988 and 1989 (Business Day, 8 November 1989). With such rising sales, rampant development continued on new projects such that the timeshare industry almost doubled in size in three years between 1986, when the industry consisted of 54 developments, and 1989 when the industry comprised more than 100 timeshare developments. By the beginning of 1990, another 18 timeshare resorts were either planned or in development, which added an extra 40 000 timeshare weeks to a market that already was fast approaching saturation point (Finance Week, 23 November 1989). In the wake of this rapid expansion of timeshare accommodation stock, developers and other players in the timeshare industry sought to expand the country's potential timeshare consumer base. In large measure this was undertaken through more aggressive sales tactics and marketing campaigns. In terms of expanding the country's potential timeshare purchase base, new sources of market expansion were targeted. First, timeshare developers and marketers began to focus on selling timeshare to the corporate market with a focus upon business tourism in relation to the winter season. The corporate market was viewed as filling a gap in the off season when low occupancies or sales were a problem. With the launch of the flexi-time timeshare product businessmen could split the occupancy to a day or more at a time such that the corporate market held great sales potential (Finance Week, 9 December 1988). Second, international timeshare sales were seen as a promising market especially with the depreciation of the currency (Financial Mail, 12 August 1988). Three, new emphasis was placed on marketing to expand the country's potential timeshare sales base including sales to Black consumers.

By the close of the 1980s signs of market saturation were apparent. With more than 1400 active timeshare sales agents in South Africa seeking to make sales and keep their jobs in an increasingly competitive market, unscrupulous practices related to high pressure sales became commonplace. The activities of marketers were deemed to be "earning the timeshare sector a bad name" (Business Day, 7 November 1989). Potential buyers were harassed by a variety of unscrupulous salesmen and marketers. A review of the timeshare market in South Africa in 1989 pointed to the negative impacts of "timeshare sharks" and "the appalling number of professional timeshare sales agents who were still being unleashed on an unsuspecting public" (Business Day, 7 November 1989). The negative sentiments of timeshare in particular related to questionable selling practices, levy escalations, schemes in financial difficulty and liquidations (Business Day, 7 November 1989). It was proposed that an element of protective legislation for the consumer be the introduction of a "5 day cooling off period" in order to allow timeshare buyers to rethink their purchase (Business Day, 8 November 1989). One controversial practice involved South African marketers following American marketing and using seductive and misleading advertisements. It was reported that marketers would state "a prize has been allocated to you", including motor cars, holidays in Mauritius, cameras and TVs. Most consumers lured to timeshare presentations by such misleading tactics, however, would receive only peak caps, T-shirts or ball point pens. The rising tempo of this form of marketing generated considerable annoyance and the attention of ethics agencies in South Africa (Finance Week, 27 July 1988). In one celebrated case it was pointed out participants in a charity contest had their entry forms handed to a timeshare company which then used that information to make misleading sales calls (Sunday Times, 3 December 1988).

A further area for consumer discontent with timeshare in South Africa related to the rapid escalation of levies at several timeshare projects. These increases "turned timeshare into a nightmare for buyers, particularly where initial estimates were way below realistic levels" (Business Day, 30 August 1989). In many instances, the operating costs of many timeshare resorts or developments had not been properly calculated and as a result many timeshare purchasers witnessed significant increases in their annual levies with some rising as high as a rate of 30% per annum, effectively negating the holiday cost savings of timeshare (Business Day, 30 August 1989). Other problems continued with project financing and the collapse of a number of high profile timeshare developments (Finance Week, 31 August 1989). Overall, by the close of the 1980s, the reputation of the timeshare sector in South Africa was fast becoming tainted in the minds of consumers. Undoubtedly, this discontent contributed to the slowing down in the tempo of new timeshare project developments over the period of the early 1990s.

3.3. Consolidation and revitalization 1990-2002

In the historical evolution of the South African timeshare industry the period 1990 to 2002 straddles the close of apartheid and accompanying radical changes in the South African tourism industry as a whole (Pandy, Rogerson, 2014). For the timeshare product, this period marked a slowing of development and reduced sales in what can be styled a phase of consolidation. A minor upturn and revitalisation, however, occurs towards the end of the 1990s with developments associated with the Sun International group, one of the leaders in casino-resort gambling (Rogerson, 1990).

At the close of the 1980s rampant overdevelopment of timeshare projects was reflected in several emerging industry problems. By 1992 the penetration of timeshare in South Africa was amongst the highest in the world. As compared to Europe or the USA where 1% of the economically active population had purchased timeshare in South Africa the level was more than 7% of the economically active population (Business Times, 26 September 1992). Sales volumes were experiencing marked decline from the record highs of 40 000 weeks recorded as sold in 1988 to 20,900 weeks by 1993 (Business Day, 16 February 1993). Despite this significant slowdown of sales, new timeshare project developments continued to come onto the market during the early 1990s. The number of timeshare developments in South Africa rose from just over 100 in 1989, to 130 in 1990, 150 in 1992, to reach 160 by 1994. From 1994, however, a marked slowdown is recorded in new timeshare projects with only nine timeshare developments added to the market between 1994 and 2002.

The addition of further timeshare weeks to the market in the 1990s precipitated further questionable and aggressive marketing tactics as desperate developers and sales personnel sought to offload timeshare weeks. Over the period of the early 1990s government consumer bodies catalogued a host of problems in the industry (Saturday Star, 1 November 1992). Among these were: gross misrepresentation by marketers of timeshare units; signing of contracts under false pretences; documentation that did not comply with the law; the disappearance of trust funds; company financial records not properly audited or in some cases did not exist at all; land not owned by the company selling the timeshare; and of high pressure salesmanship, including the offering of non-existent free gifts and the concealment of certain obligations such as heavy levies. In one high profile case certain buyers on inspecting a property they had purchased unseen "found that the apartment consisted of two dingy bedrooms overlooking a car park, railway line and another building" rather than the promised sea-facing view (Sunday Times, 10 June 1990). In addition, several other cases were recorded of the collapse and closure of certain timeshare developments because of developers "disappearing" and leaving unpaid bills and non-existent building maintenance behind (Financial Mail, 4 September 1992). In the absence of audited compulsory financial statements a number of resorts were placed in liquidation and at Umdloti Sands the developer of the timeshare resort simply "vanished" while still owing millions of Rands to creditors (The Star, 9 September 1992).

A 1994 national survey conducted involving 1,300 timeshare owners about consumer perceptions of service disclosed a litany of complaints. Among the most important related to contracts often not properly explained to buyers. Additionally, buyers were not informed of changes to the development or project purchased, such that in many instances promises made to build or provide certain amenities at resorts often were not realized (Sunday Times, 6 March 1994). The difficulty of the reselling of units in the timeshare industry in South Africa was a further issue of contention. With an estimated 60% of timeshare owners considering selling their timeshare purchase there was no effective resale market. The lack of a resale market for timeshare prompted one outraged aspirant seller to remark "a timeshare is like AIDS, once you've got it you can't get rid of it" (Sunday Times, 26 September 1992).

With the scrapping in 1991 of the apartheid Group Areas Act that had effectively stopped Blacks from purchasing timeshare, marketing agents were unleashed on this new potential market. Selling practices once again often were unethical. In one instance a black nurse having been told that she had won a prize, arrived at the company's offices near Soweto with the friends she had been asked to bring along and was "subjected along with eight black couples – to a heavy sales pitch on timesharing". In a newspaper interview she would later exclaim: "It was also very boring. And not one black person could be seen in the videos of the timeshare complexes" (Sunday Times, 14 October 1990). In another case a couple living in a two-roomed rented house in the rundown suburb of Riverlea Extension (Johannesburg) were plagued by telephone calls to inform them they had won a prize. Even after the marketers were told the couple did not own a car and could not afford the transport costs to collect their 'prize' the telephone salesperson persisted. Finally, after agreeing to attend a presentation to claim their prize the couple "were offered a sheaf of papers and told to sign them. When they asked what the papers were, they said the papers had nothing to do with anything". Shortly afterwards "they were asked for a R3,000 deposit" for the timeshare they had seemingly purchased (Weekly Mail, 16 November 1994).

As a result of the significant extent of overdevelopment and declining sales of timeshare, many developers and their respective projects experienced financial problems during the 1990s. In this phase of industry consolidation amidst economic slowdown a number of small developers closed operations or were forced to sell their projects to larger developers (Financial Mail, 20 May 1993). The collapse of struggling developers further impacted negatively upon the reputation of the industry both for prospective timeshare buyers and those that had already purchased timeshare. Throughout the 1990s it was estimated as many as 30 timeshare developments collapsed and liquidated. The downturn in the timeshare industry impacted even the industry leader, Southern Sun, which announced staff retrenchments and restructurings in the wake of the poor earnings which accompanied sales in decline.

Timeshare developers responded with several new initiatives. First, was to extend timeshare sales away from the saturated inland markets of Johannesburg, Pretoria and surrounds. Industry players highlighted market demand was geographically uneven with timeshare sales in Cape Town and the Western Cape in general still showing good results (Business Day, 16 February 1993). Second, a significant amount of struggling developers sought sales by dropping the price of their timeshare offerings in order to attract potential purchasers. Finally, other developers particularly in the Western Cape, started to focus specifically on establishing products catering almost exclusively for the wealthiest sectors of the timeshare market. One specific example of this niche property development was the Peninsula All-Suite Hotel. This property was structured as a mixed use resort where all the suites are available either as hotel rooms or timeshare units.

During the 1990s further actions were launched to rescue the tarnished image of South African timeshare. In 1990 SAPOA began a campaign designed to correct misconceptions about the industry with its major objective to clear up confusion about timeshare as an investment. SAPOA introduced new measures to forbid member developers from selling timeshare as an investment for resale. Several safeguard measures were introduced. These included stringent examinations for timeshare sales personnel so that misrepresentation was reduced to a minimum, the registration of sales people who were involved in timeshare, and a SAPOA code of ethics (Sunday Times, 25 March 1990). In a further development to deal with the issues of unprofessional sales agents SAPOA established a training course for sales personnel. With the tougher regulation of the industry's sales and marketing personnel and the introduction of a mandatory diploma in timeshare sales, the number of sales agents in the industry fell from 1,400 to 400 by 1993 (Business Day, 30 June 1993). In addition, steps were taken to help timeshare developments in distress in order to avoid liquidations and the subsequent damage that such situations created.

Beyond 1994 the volume of new timeshare development or projects was in marked decline. One signal for revitalization in the local timeshare industry was the introduction by Southern International of timeshare at its Sun City complex in 1996. This development was notable in that the offerings at Sun City represented only a limited term product with purchasers' obtaining a 15 year right to use. It was argued this initiative signalled a revitalization of the timeshare market in South Africa. In its first phase it involved the conversion of existing accommodation at the resort for use as timeshare and was sold out rapidly (Stocks, 2012). The Sun International timeshare scheme was termed the Vacation Club. This allowed the company to improve its management of the cyclical nature of the hospitality business more efficiently and to keep occupancies at consistently high levels throughout the year. The Vacation Club offered low cost self-catering holidays at the corporation's 234 timeshare units which were spread across the group of Sun International Hotels at resorts which included Sun City, the Wild Coast Sun, the Fish River Sun as well as Ezulwini Sun in Swaziland (Financial Mail, 18 October 2002). Further revitalization of the timeshare industry was again evidenced through new developments which took place at Sun City when a phase two of timeshare development took place. It was during this second phase development of the timeshare market at Sun City that emphasis was upon purpose-built accommodation rather than conversion of existing facilities. The Sun City phase 2 was the first major new development in timeshare which had been launched for several years in South Africa. It represented a luxury development in which many existing owners of timeshare at Sun City reportedly traded-up in order to take advantage of the new development (Stocks, 2008).

The Sun City project is the most important of the final nine timeshare projects which were established in South Africa over the period 1990 to 2002. By 2002 sufficient stock of timeshare units existed to cover demand thus limiting the prospects for new build developments (Hatjigiannakis, 2012). Increasingly, therefore, the timeshare market began to be oriented around timeshare re-sales. With many share block schemes and sectional title developments completely sold out and reaching maturity, the country's timeshare developments increasingly were placed under the control of individual resorts or project purchasers through the vehicle of development associations (Pienaar, 2012). As a consequence, timeshare developers were free to pursue other avenues of property development in South Africa. Many moved back to developing wholly-owned units within the second homes market whilst others looked to innovate new products such as fractional ownership developments (Bosch, 2012).

4. Conclusion

Geographers of tourism have so far offered few contributions to issues relating to timeshare forms of accommodation and resort development. Against the backdrop of this knowledge deficit the aim in this article was to undertake an analysis of the unfolding spatial organisation of timeshare property developments in South Africa and interpret the multiple issues that challenged the emergence of the industry. South Africa is one of the most important locations for timeshare in the developing world and the most prominent in sub- Saharan Africa and thus a useful case study of industry issues. Moreover, the mapping of the changing historical evolution of timeshare developments has not been a focus in the limited international literature on timeshare.

At the outset the findings point to the usefulness of periodizing the evolution of the timeshare industry in South Africa. Three distinct phases are discerned, namely (1) the initial developments from 1978 to 1982, (2) the growth phase which witnessed substantial building of new resorts and conversion of existing tourist accommodation during the period 1982 to 1990, and (3) the phase of slowdown and consolidation of the industry from 1990 to 2002. The first period 1978 to 1982 was identified as setting the foundations for the early development of timeshare in South Africa including the key developments and central trends that would see the acceptance of the timeshare product in the country and thereby allow further growth. With these foundations in place the period 1982 to 1990 was one of rapid expansion for the industry. This was a vibrant phase in which much new resort development took place, albeit with the emergence of a number of critical issues, notably around negative images about the industry. The latter period from the early 1990s to 2002 was characterized by industry consolidation and a slower pace of new resort development. The spatial contours of the South African timeshare industry were laid down in the 25 year period covered by this investigation. Overall, it is revealed that coastal areas offering a sea, sun and sand experience to domestic tourists represent the base of the industry. Nevertheless, more recent timeshare property developments have been undertaken in areas of high natural beauty, close to casino entertainment resorts as well as at sites close to protected nature reserves. Comparative investigations are merited on the evolution, locational influences and development challenges of the timeshare industry in other areas of the developing world.

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