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The geography of the South African adventure tourism industry

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Abstract

The spatial organisation of the adventure tourism industry in South Africa is presented based on an analysis of a national dataset of adventure tourism suppliers. At a national level, the spatial distribution of adventure tourism in South Africa is geographically uneven. The Western Cape is by far the most important province in terms of adventure, followed by KwaZulu-Natal and then Gauteng. Coastal provinces are at an advantage when it comes to building an adventure tourism industry, but the presence of physical resources such as the sea, mountains, rivers, dunes, open veld and nature reserves alone, does not account for development of the sector. Density and distribution of operators is also linked to both population size and disposable incomes, making adventure tourism a tourism-related product across all provinces, but also a tourism-characteristic product in both the Western Cape and KwaZulu-Natal, supported by both domestic and international tourists. Indications are that for seven of the nine provinces, the sector is underdeveloped so opportunities for expansion abound, especially in terms of urban adventure products.

Key words: Adventure tourism; South Africa; commercial; geographic distribution

Introduction

In terms of climate and physical geography, South Africa has the resources that Buckley (2006) maintains are essential for adventure tourism to flourish. Despite this, adventure tourism is a relatively new sub-sector of the tourism market in South Africa, albeit with considerable scope for growth (Fournier, Roux, Caumes, Donzel & Raoult, 1998; Rogerson, 2007a; Swart, 2010; Rogerson & Visser, 2011a). As the South African government is actively seeking to further develop its tourism market, it is posited by Rogerson (2006) that adventure tourism offers one such way of doing so. A significant hindrance however, is the absence of policy on promoting adventure tourism, with no mention of it in the National Tourism Sector Strategy (South Africa, 2012). Little is known about the industry, with a few academic studies on surfing (Preston-Whyte, 2002); backpackers (Visser & Barker, 2004; Visser, 2004a, 2005; Rogerson, 2007b); trekking/hiking (Hill, Nel & Trotter, 2006; Linde & Grab, 2008); SCUBA (Mograbi & Rogerson, 2007; Dicken, 2014); adventure racing (Fournier, et al, 1998); challenges facing the industry (Rogerson; 2007a; Swart, 2010); motivations (Lötter, Geldenhuys & Potgieter, 2012; Giddy & Webb, 2016); bungee jumping (McKay, 2013a, 2014a, 2014b), white water rafting (Greffrath & Roux, 2012; McKay, 2013b, 2014c, 2015), the sardine run (Dicken, 2010; Hutchings, Morris, Van Der Lingen, Lamberth, Connell, Taljaard & van Niekerk, 2010; Van Der Lingen, Coetzee & Hutchings, 2010; Myeza, Mason & Peddemors, 2010), tiger shark diving (Dicken & Hosking, 2009; Du Preez, Dicken & Hosking, 2012) and shark fishing (Dicken, Smale & Booth, 2006). But, with 'no systematic investigation on adventure tourism in South Africa' there is an inability to make policy recommendations on how it can be supported and further developed (Rogerson, 2007a: 229). This study, therefore, sought to describe and explain the size and spatial distribution of the South African adventure tourism industry. As such it also contributes to both the international and South African literature on the supply of adventure tourism in general and on adventure tourism operators in particular, which has been identified by Cheng, Edwards,

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Darcy and Redfern (2016) as a neglected topic in terms of academic studies. The paper is structured in the following manner: A brief overview of both adventure tourism and the broad geography of tourism in South Africa are presented. Then the methodology is described and the findings follow. Thereafter follows a summary and conclusions.

What is adventure tourism?

For Cloke and Perkins (1998: 185, 189) adventure tourism is placed in the category of "niche, green or alternative tourism", as tourists are actively seeking out "participatory experiences" that involve "doing active and physically challenging things in the outdoors". Accordingly, this study is located conceptually within the broader academic debates of niche, special interest tourism or 'alternative tourism' (Robinson & Novelli, 2005; Tinsley & Matheson, 2010). Within this context, Pomfret (2011) and Cheng, *et al*. (2016) argue that adventure tourism evolved out of nature-based or ecotourism, whereas Buckley (2000) disagrees, viewing nature based, ecotourism and adventure tourism (NEAT) as a distinct niche sector in itself. Mowforth and Munt (1998), Trunfio, Petruzzellis and Nigro, (2006), Trauer (2006) and Lew (2008) all argue that niche tourism involves attracting small groups of higher paying tourists by offering a differentiated tourism product, in particular, offering tourists a more meaningful experience. Internationally, while adventure tourism started as a relatively small niche market, it is both lucrative and growing in size (Sung, 2004; Cheng, *et al.* 2016). In this vein, adventure tourism is posited as a post-Fordist economic activity where the products are personalised and tailored to meet the needs and wants of a specific audience (Sung, 2004; Robinson & Novelli, 2005). Within the post-Fordist paradigm comes a sense that adventure tourism is less commercialised than mass tourism and with that comes the expectation that it is more able to feed positively into the local economy, is less likely to compete on price and more likely to be environmentally and socially sustainable (Wearing & Neil, 1999; Newsome, Moore & Dowling, 2002; Robinson & Novelli, 2005; Bagri, Gupta & George, 2009; Richards, 2010).

Although what constitutes adventure tourism is highly contested, most scholars agree that risk is at the heart of the industry (Buckley, 2000, 2005, 2006; Swarbrooke, Beard, Leckie & Pomfret, 2003; Kane & Zink, 2004; Stanbury, Pryer & Roberts, 2005; Fletcher, 2010). That is, the participants on an adventure tourism trip are physically active, but, as it is commercialised, the challenge and danger (risk) is controlled or managed by the tour operator and the paid guides (Bentley, Page & Macky, 2007; McKay, 2015). Thus, "adventure tourism is the sale of an adventurous trip or activity where there is some risk, uncertainty and challenge involved. Clients are actively and physically involved and most people experience strong emotions, such as fear and excitement, whilst participating" (McKay, 2015: 2). The actual activities are divided into three categories: hard, soft and nature-based adventure (Buckley, 2006; McKay, 2013c). 'Hard Adventure' are the more physically active and risky activities such as SCUBA diving and white water rafting, whereas 'Soft Adventure' is less challenging, less risky and less physical, such as zip-lining. With 'Nature-based Adventure', clients interact with animals such as walking with elephants, gorilla safaris and diving with sharks, with risk associated with the uncertainties pertaining such interactions (Buckley, 2010).

A review of international adventure tourism literature highlights a number of emerging themes. The most significant issues are those relating to inter alia risk and risk management (Weber, 2001; Beedie, 2005; Cater, 2006; Pomfret, 2006; 2011; Kane, 2010); the role entrepreneurs play in the development of the industry (Williams & Soutar, 2005; Thomas, Shaw & Page, 2011); how the industry is marketed (Varley, 2006; Buckley, 2007; Berger & Greenspan, 2008; Williams & Soutar, 2009; Lawrey, 2010); environmental impacts and sustainability (Marques & Cunha, 2010; Blichfeldt & Pedersen, 2010); why people purchase

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an adventure product (Buckley, 2006; Berger & Greenspan, 2008; Litvin, 2008; Bott, 2009), as well as the economic impact of the industry, especially at the local level (Beedie & Hudson, 2003; Swarbrooke et al., 2003; Buckley, 2007; Stonehouse & Snyder, 2010). On the whole, however, research on the adventure tourism experience dominates with the operators and the supply side of the industry relatively neglected (Cheng *et al*. 2016).

The South African tourist economy

Three key themes emerge from an analysis of the South African tourist economy. Firstly, the industry has a long history of racial polarisation. That is, it was conceived of as an industry catering to the recreational and leisure needs of white residents (most of whom lived in what is now Gauteng, the Western Cape and KwaZulu-Natal) and colonial expats who resided north of South Africa's borders (Rogerson, 2011, Visser, 2016). As such, the role of Black, Coloured and Indian people in the tourist economy was, at best, confined to that of service providers, particularly at a level of menial labour (Rogerson & Visser, 2004; Visser, 2016). Encouraging and enabling Black, Coloured and Indian people to become 'consumers of leisure holidays' is therefore a significant challenge facing the post-apartheid tourist sector (Butler & Richardson, 2015). Consequently, the South African tourist economy was (and is) heavily reliant on expenditure by white domestic tourists. Not only were the consumers (tourists) white, so too were the owners and operators of tourism products and organisations, resulting in the sector facing significant pressure by the post-apartheid government to transform and contribute to poverty alleviation (Rogerson, 2007a; Visser & Hoogendoorn, 2012; Rogerson & Visser, 2014). Secondly, as South Africa also practiced spatial apartheid, the provision of tourist products was almost entirely confined to designated 'white space' with minor exceptions made in the late apartheid era for tourism products to be built in certain spots within the so-called 'homelands' (Rogerson, 2015). In some cases, forced removals were used to ensure that the geographical location of tourist resources - such as that of national parks - overlapped with white space (Butler & Richardson, 2015). This has resulted in a highly polarised spatial tourist economy, not only at provincial level, but also representing a rural/urban divide and a metropolitan area/small town divide as well (Visser, 2003; Hoogendoorn & Rogerson, 2015). Thirdly, the long period of international isolation that followed World War Two, resulted in an inward looking tourist economy that was unable to attract international tourists and was also neglected by the apartheid government in terms of policy and developmental support (Visser, 2016).

Methodology

The study set out to determine the extent of South Africa's adventure tourist market with respect to the number of enterprises and their geographic location. To this end, a national audit was undertaken between the years 2011 and 2012. The analysis then made use of other national databases, such as the StatsSA Census of 2011 in order to compare like with like in terms of dates. This audit found that there are 827 adventure tourism operators in South Africa. The database captured the types of adventure activities on offer, if they were direct suppliers or not, as well as the contact details (for data verification purposes) of each enterprise. Based on this, a national profile of the South African adventure tourism industry was generated. An internet or web-based search formed the backbone of the research methodology, and can be best described as an internet foot printing approach (McKay, 2013b; Rogerson & Wolfaardt, 2015). Various web search engines were used, such as Google, Yahoo and Bing. Over a period of a year, searches were undertaken using various key words, such as 'adventure'; 'South Africa'; 'adventure tourism', as well as the products of adventure tourism such as 'bungee jumping', 'quad biking', 'scuba diving' and the like. A web-based search was undertaken for a number of reasons: Firstly, it is increasingly evident that for tourism, the most important marketing mechanism now is the Internet (Wynne,

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Berthon, Pitt, Ewing & Napoli, 2001; Levinson & Milne 2004; Lew 2008). Secondly, in the absence of a national database, using various internet search engines is cost effective and time saving (Rogerson & Wolfaardt, 2015). This is particularly true when compared to the costs and time involved in completing such a survey by other means.

There are limitations to drawing inferences from Internet footprinting, since the size of the web footprint and the actual number of enterprises offering adventure tourism products and associated activities may not be an exact match (McKay, 2013c). Thus, the database was supplemented with various industry sources, in particular, from enterprises represented at various regional 'outdoor' shows. That is, brochures and pamphlets collected from each and every operator present at three large outdoor/adventure shows that took place in Johannesburg between the years 2011 and 2012. Lastly, the information in the database was further supplemented by collecting data from adventure publications, such as Dirty Boots. The database was then verified either by personally visiting the operators or, phoning a randomly selected representative sample of the operators on the database. The verification process revealed that some companies advertised on the internet could not be found. Some businesses use different/multiple names or websites, but for all intents and purposes are one operator. This may be a marketing trick, to generate the impression that there are multiple operators in competition with each other. Duplicate operators were removed from the database. Overall there was a strong overlap between those operators advertising on the internet, having a presence at regional outdoor or adventure shows and being in adventure publications. The verification process resulted in the cleaning of the database, which can be said to be accurate with a margin of error of approximately five percent. Importantly, micro enterprises may be under-represented due to the extremely low profile of such operations. Some operators could be best described as 'seasonal', that is, they only 'appear' during peak season and cease operations in the off (winter) period. These businesses in particular are micro enterprises and appear to be 'one-man-shows'. This is particularly true for rafting operations on the Vaal River. It was also found that some companies deliver their product to clients in a different province from the one in which they are based, something that is especially true for some Western Cape and Gauteng operators.

The geographic distribution of adventure operators

The key results from the national audit of adventure tourism enterprises are captured on Table 1 and Figure 1. These reveal an uneven geographical pattern of development of the adventure tourism economy in South Africa on a provincial basis. Explanations for the uneven spatial development of adventure tourism in South Africa are explored in this section in relation to several factors.

It is revealed that the Western Cape is by far the biggest or most important province in terms of number of adventure tourism operators. This is followed by Kwa-Zulu Natal and Gauteng (see Table 1 and Figure 1). Combined, these three provinces are home to the vast majority of enterprises (602) or 73% of the entire industry. It can be said, therefore, that the spatial distribution of adventure tourism in South Africa is geographically uneven, with a disproportionate number located in just three of the country's nine provinces. This finding is in line with the work of Visser (2004b) and Visser and Hoogendoorn (2012) who indicate that the South African tourism economy is spatially uneven and polarised. However, this is a change from what Rogerson found in 2007a, when the adventure tourism market was dominated by KwaZulu-Natal and the Western Cape. Thus, the industry has spread to Gauteng. To explore some of the possible reasons for the geographic unevenness, the number of operators by province was compared to population size using the Census 2011 data from StatsSA. It was found that there is a positive relationship between population size and number of operators [R^2=0.3868] (see Figure 2). So the greater a province's population, the more likely the province is to be home to adventure tourism operators. This is an indication that, to a degree the South African adventure tourism sector relies on local residents (day trippers). The results of the national audit point to the fact that Eastern Cape and Limpopo are underperforming based on population size. The Western Cape is a significant outlier, outperforming its population, indicating that for this province, adventure tourism may cater to tourists rather than day trippers. As Visser (2007) and Rogerson and Rogerson (2014) report, the Western Cape is the most popular destination for international long haul leisure tourists and also a very popular destination for domestic tourists (although not the Visiting Friends and Relatives category).

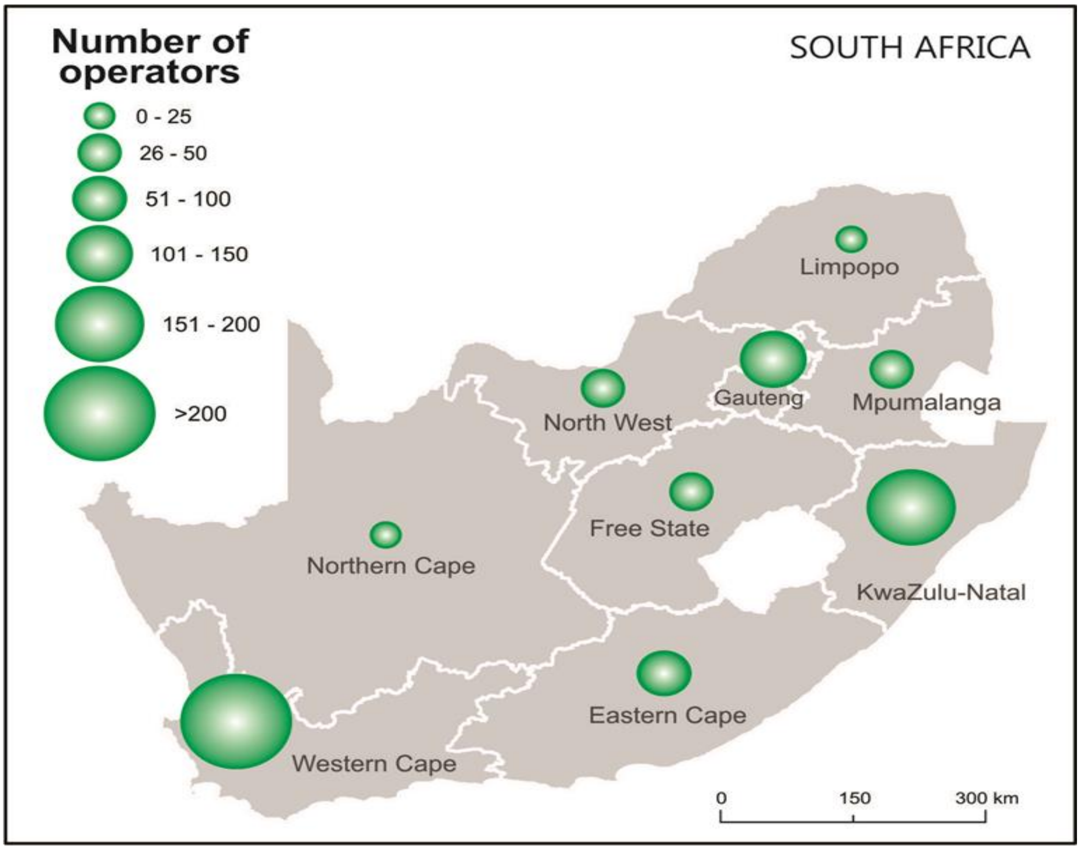

Figure 1: Geographical distribution of adventure tourism operators by province.

In order to further explore if demand for adventure tourism is fuelled by local residents (day trippers) or tourists, the relationship between average household income by province and number of operators was determined using data from the Census 2011 (StatsSA, 2014) (see Figure 3). In this regard, there is a stronger relationship between provincial household income and number of operators [R^2=0.5361] than population size. When examining the population by education level (as a proxy for likelihood of being employed and having disposable income, see Bhorat & Oosthuizen, 2009), it is clear that the adventure tourism industry is not dependent upon people with no schooling [R^2=0.0077]. Correspondingly, there is a positive correlation between people with either a matric (completed secondary school) [R^2=0.3873] and have post matric qualifications [R^2=0.3195] and number of adventure tourism operators (see Table 1). Thus, household income is driving demand for adventure tourism products.

Thus, operator numbers are linked to local residents having sufficient disposable income to purchase an adventure tourism product. Being the poorest province in South Africa (in terms

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of household income) helps to explain why Limpopo has such an underdeveloped adventure tourism industry as day tripper demand is extremely small.

Table 1: Number of operators, by province, in order of magnitude (2011 - 2012)

Province	Operators	Provincial population as %	Avg House hold income	No of people with no schooling	No of people with matric	No of people with post matric	Percentage of population that is white	No designated priority district municipalities
Western Cape	259 (31.3%)	11.2%	R 143 461.00	102 242	1 055 442	539 827	15.7	0
Kwa-Zulu Natal	193 (23.3%)	19.8%	R 83 050.00	375 754	707 524	310 872	4.7	9
Gauteng	150 (18.1%)	23.7%	R 156 222.00	76 861	153 008	50 765	7.1	0
Eastern Cape	66 (7.9%)	12.7%	R 64 550.00	115 380	435 291	158 799	8.7	5
Mpumala nga	48 (5.8%)	7.8%	R 77 597.00	621 199	1 784 358	53 7664	4.2	1
North West	39 (4.7%)	6.8%	R 69 914.00	248 116	529 121	162 815	7.3	3
Free State	33 (3.9%)	5.3%	R 75 314.00	301 311	2 832 448	1 492 322	15.6	0
Northern Cape	20 (2.4%)	2.2%	R 86 158.00	325 540	670 343	223 579	6.5	1
Limpopo	19 (2.3%)	10.4%	R 56 841.00	499 073	645 578	273 469	2.6	4

Source: Population and income data Census 2011, StatsSA, 2014.

This is further supported by an analysis of operators compared to the number of priority district municipalities per province. A priority district is one that is designated as very poor by national government (Rogerson, 2014). To this end there is no correlation between the two variables [R^2=0.0005] indicating that poor areas are unable to support adventure tourism. The one exception is KwaZulu-Natal, with nine designated priority districts, making this province an outlier and indicting the extent to which it is tourists rather than day-trippers that support the industry in that province.

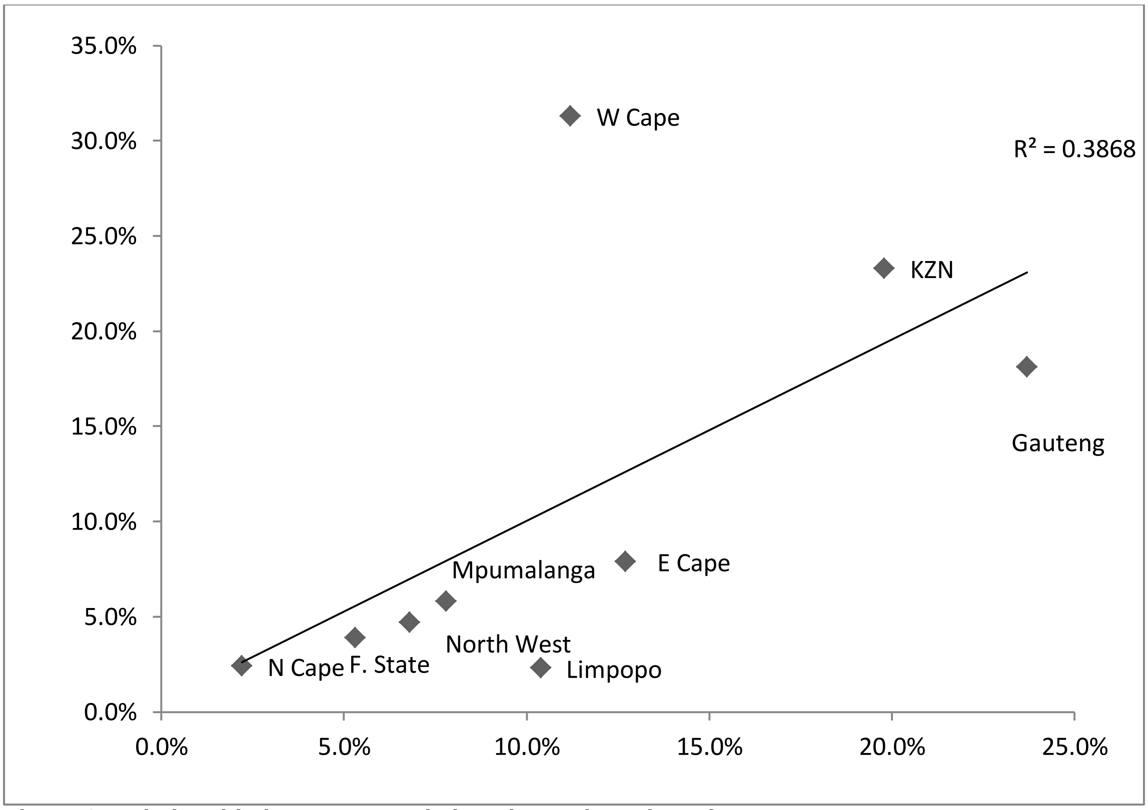

Figure 2: Relationship between population size and number of operators

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With regards to income, KwaZulu-Natal is a significant outlier, outperforming its household income. In this case, some of the demand for adventure tourism products in the province is linked to tourists, most likely domestic tourists as both Visser (2007) and Rogerson and Rogerson (2014) have shown the province to be a popular domestic tourism destination. Both KwaZulu-Natal and the Western Cape are also outperforming their number of residents with matric or post matric, another indicator that these provinces are relying on tourists to drive the adventure tourism industry. Gauteng, being the richest province, is underperforming based on household income, matriculants, and residents with a post matric; indicating that disposable income levels have not been sufficiently leveraged in this province by the adventure tourism industry. Although in terms of household income, the Eastern Cape is very poor, its adventure tourism industry is larger than other provinces with higher household income, but in line, however, with the number of matriculants and residents with post-matric, indicating that at least some of the industry in the Eastern Cape is sustained by local demand. It could be argued that as parts of the province fall into the Garden Route, a popular domestic tourist destination, domestic tourists are sustaining the sector in that the province (Visser, 2007). However, it must be noted that most of the tourists to the Eastern Cape fall into the 'Visiting Friends and Relatives (VFR)' category rather than 'leisure tourist' category and many of the VFR are actually poor black migrants returning home for their annual vacation (Rogerson, 2015). Such people are unlikely to purchase an adventure tourism product.

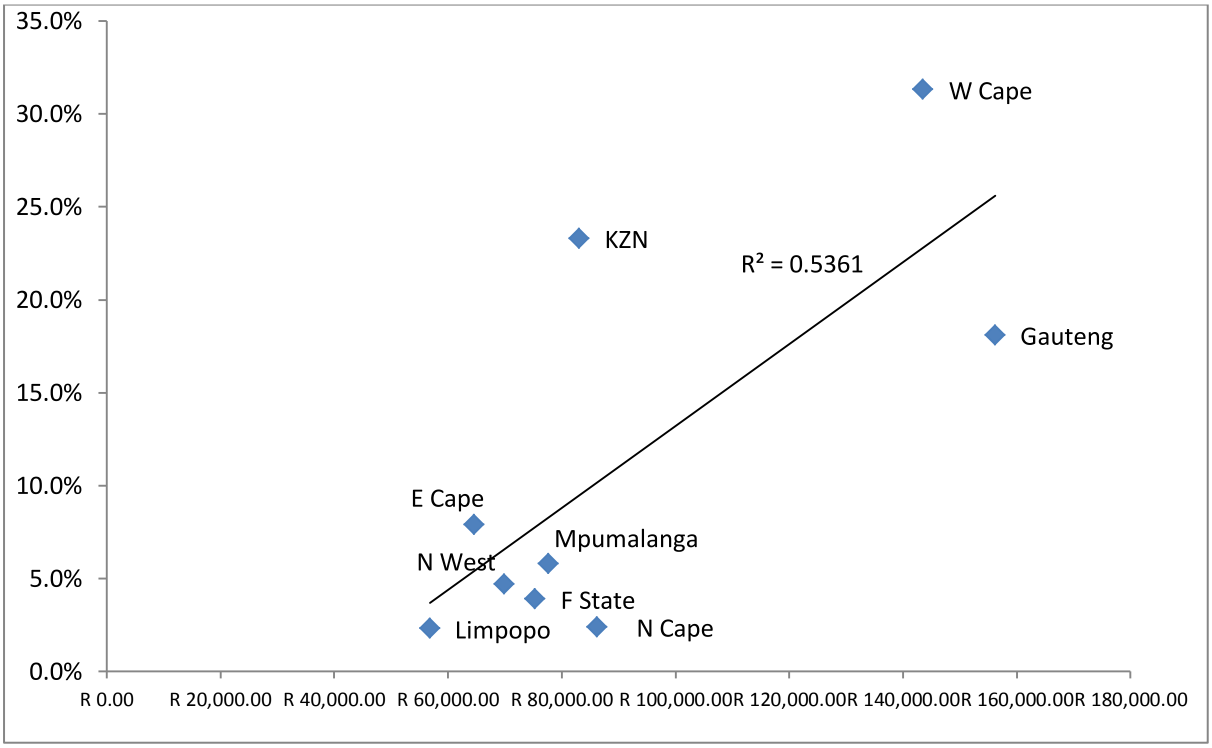

Figure 3: Relationship between household income and number of operators

Because the pre-1994 South African domestic tourism market was built around the recreational desires of the white population, an analysis was also done by number of white people residing in each province (see Table 1) (Visser & Rogerson, 2004). A positive relationship [R^2=0.344] was found between the size of the residential white population in each province and the size of the adventure tourism industry. This result suggests that the pre-1994 racialized consumption patterns still prevail in the adventure tourism sector. Thus, although the white population is likely to be better educated (because of past apartheid policies) and so race and income overlap, there is still a legacy of apartheid tourism planning

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visible in the adventure tourism sector. This is similar to what Butler and Richardson (2015) found for national parks in South Africa. Once again, KwaZulu-Natal is an outlier, another indicator that tourists are driving the adventure tourism industry in that province. To further unpack this, it was found that there is a negative correlation between adventure tourism operators and the Black African population [R^2= -0.287] indicting that Black people are far less likely to be clients of adventure tourism operators. There is a small correlation between the Coloured population and adventure tourism operators [R^2=0.1493] but this is distorted by the Western Cape, where the bulk of the South African Coloured population resides. It is recommended, therefore, that the role of the Coloured population in terms of supporting adventure tourism in the Western Cape be explored. For Indian people, the correlation is R^2=0.2208, distorted by KwaZulu-Natal. This is most likely because the bulk of the South African Indian population resides in that province. However, the role Indian residents are playing in generating demand for adventure tourism products in KwaZulu-Natal should be further investigated. Overall, with the possible exceptions of the Western Cape and KwaZulu-Natal, day trippers are likely to be white people. Thus, it is clear that population size, disposable income (average household income and education levels) and, to an extent race, can partly explain the distribution of adventure tourism operators. This finding is in line with that of Lötter *et al.* (2014) who found that a typical adventure tourist in Pretoria (Tshwane) was a local resident with a tertiary education and earning between R10 001 and R29 999 per month.

Adventure tourism as a tourism-related or tourism-characteristic-product

StatsSA (2014:12) defines a tourism-related product as “where visitors consume a smaller proportion of the total supply of the product. Visitors must purchase more than 0 per cent and less than 25 per cent of its production”. On this basis it can be said that South African adventure tourism operators are supported by local residents, making adventure tourism a *tourism-related product*. But it is clear that local consumption by day trippers can only partly explain the size and distribution of the South African adventure tourism industry. Thus, the analysis now turns to explore the extent to which adventure tourism is also a *tourism-characteristic product*, again using the StatsSA (2014:12) definition which is that “a tourism-characteristic product is a product that will cease to exist in meaningful quantity, or for which the level of consumption would be significantly reduced in the absence of visitors. At least 25 per cent of its production is purchased by visitors”. In this regard the focus must turn to tourism support such as resources and infrastructure. The physical resources outlined in Table 2 such as rivers and coastlines are considered key adventure tourism resources. Factors essential for adventure tourism but not considered here are: (1) medical services - paramedics, compression chambers, sea rescue services, hospitals, clinics and medical professionals; (2) governance – policies and laws that support the tourism industry such as protection of resources, rule of law, safety rules and regulations, as well as medical insurance; (3) entrepreneurship – the number of people with the skills, knowledge, passion and business acumen who are willing and able to take on the risk of setting up and managing an adventure tourism business; and, lastly (4) the image, brand and marketing of the province or region as an ‘adventure centre’ or a place of adventure. Additional tourism infrastructures that will, however, be considered are the air and road transportation network.

As the ‘sports and recreational services’ category [category number 96590.1 - risk sport and adventure] which incorporates adventure tourism (see StatsSA, 2014) recorded for 2012, a sum of R3 021 million spent by domestic tourists and R5 592 million spent by international tourists (or 6.5% of total tourist spend) on the sector it can be said that adventure tourism is also a tourism-characteristic product. Consequently it can be argued that both domestic and international tourists support the South Africa adventure tourism industry. However, not all provinces are able to attract in the adventure tourist. With this in mind, the analysis turned to

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explore possible reasons why some provinces are able to attract adventure tourists and others are not. One way to do this is to assess the adventure tourist asset base of each province (Rogerson, 2015). Physical resources such as sea, mountains, rivers, dunes and open veld, are all associated with adventure and so attract adventure tourists (see Table 3). Thus, the relationship between the different types of physical resources and number of operators was undertaken.

It was found that there is a relationship between such resources and the number of operators [R^2=0.3556]. Provinces with relatively few physical resources, such as the North West and Northern Cape are home to only 9% of all operators. The Western Cape, the Eastern Cape and Kwa-Zulu Natal are blessed with many physical resources and these provinces account for 518 operators, or 62.64% of the industry. Thus, KwaZulu-Natal and the Western Cape have been able to harness their physical resources to pull in adventure tourists. This finding is in line with the work of Visser (2007) and Rogerson and Rogerson (2014) who found that both provinces attract many leisure tourists. However, of these three provinces, only 7.9% of all operators are found in the Eastern Cape. Thus, the Eastern Cape is not supporting the same number of operators that the Western Cape and KwaZulu-Natal despite being blessed with numerous physical resources that lend themselves to adventure. Consequently, although supplies of physical resources are a major factor, they alone will not ensure adventure tourists travel to a location (see Figure 4). They are also not an absolute essential either. Gauteng (with 150 operators) is an indicator thereof, with very few physical resources but a high number of operators.

Table 2: Operators, provinces and physical resources (Source: Author)

Province	Physical resources associated with adventure	No of parks, MPAs and WHSs	Ratio of parks, MPAs and WHSs to operators
Western Cape	Sea, mountains, rivers, dunes, open veld	15	1:17.26
Eastern Cape	Sea, mountains, rivers, dunes, open veld	11	1:6
KwaZulu-Natal	Sea, mountains, rivers, dunes, open veld	5	1:39
Northern Cape	Rivers, open veld	4	1:5
Limpopo	mountains, rivers, open veld	4	1:4.75
Mpumalanga	mountains, rivers, open veld	2	1:24
North West	Rivers, open veld	2	1:19.5
Free State	mountains, rivers, open veld	2	1:16.5
Gauteng	Rivers, open veld	1	1:150

In order to further explore the role physical resources play in supporting the adventure tourism industry, a comparison was done between inland and coastal provinces in order to determine what role the sea and associated dunes play in creating an adventure tourism market. In this regard, it was found that the four coastal provinces are home to 64.9% of the operators. Consequently coastal physical resources are an important base to build an adventure tourism industry on. Being an inland province, however, is a hindrance to developing an adventure tourism industry. Inland provinces have far fewer operators than those with a coastline. Of the four coastal provinces, the Northern Cape is a significant outlier, with only 2.4% of the operators. Cognisance of the Northern Cape coastline must be taken into account, however. In particular the coastline of this province is the most under developed (if not almost undeveloped) for tourism for numerous reasons. The terrain is not easy to navigate; the road network is limited and 4x4 vehicles are often required. Much of the coastline has only recently been opened up to the public as it was previously a diamond area and entry was heavily restricted. Accommodation is limited and simple. The sea is cold and not conducive to swimming. The area is arid with an annual rainfall of only 72mm and an annual average temperature in the early 20˚Cs in summer, with night-time temperatures low (11˚C to 12˚C).

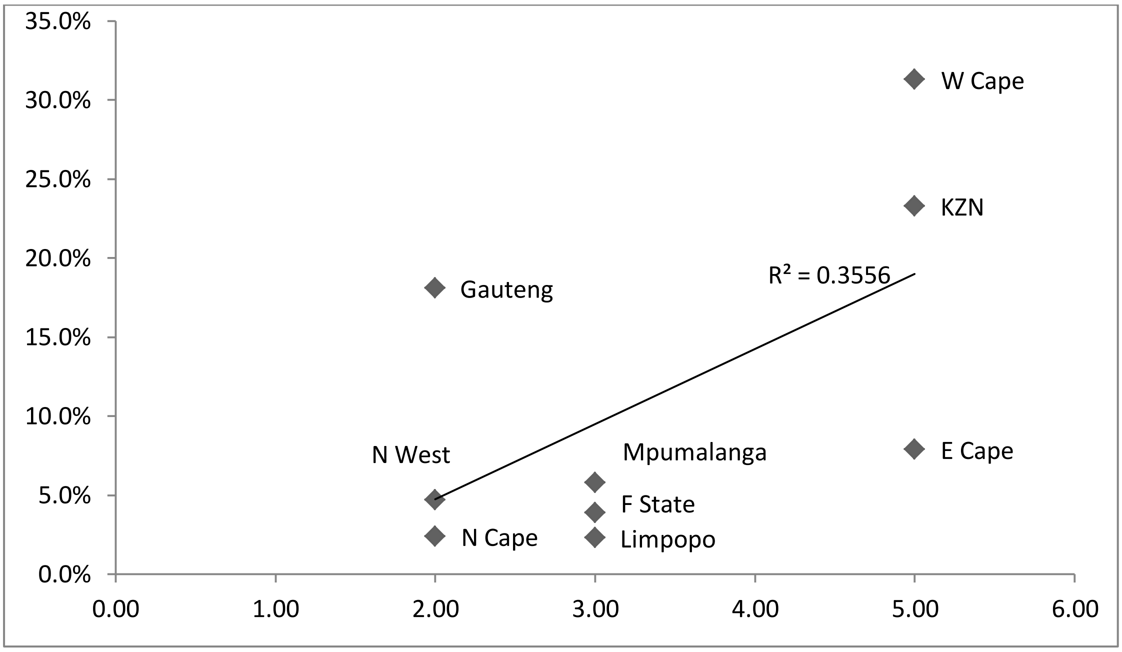

Figure 4: Relationship between physical resources and number of operators

Thus, this part of South Africa, while beautiful, peaceful and adventurous, does not attract many tourists and even if it did, it could not support a huge influx of them. The other three coastal provinces (Western Cape, Eastern Cape and KwaZulu-Natal) are very different from the Northern Cape. All have excellent swimming beaches and a climate that attracts tourists. Again, however, compared to the Western Cape and KwaZulu-Natal, the low number of adventure tourism operators in the Eastern Cape indicates that this province is not leveraging its physical advantage in a way that the other two provinces are.

Another tourist asset, and one well known for attracting leisure tourists (who contribute the greatest in terms of tourist spend) are national parks, marine protected areas and world heritage sites (Binns & Nel, 2002; Rogerson, 2015; Rogerson & Rogerson, 2014; Lelliott, 2016; Rogerson & van der Merwe, 2016). Such resources are important to building a tourist economy in a locality. A list of these resources per province is given in Tables 2 and 3, and mapped in Figure 5. Nationally, there is an average of 18 operators per National Park, Marine Protected Area (MPA) or World Heritage Site (WHS). It was found that proximity to these features has a positive effect on the adventure tourism sector [R^2=0.3262]. The relationship is strongly affected by two significant outliers, however. Firstly Gauteng, with only one World Heritage Site is performing very well considering it does not have the kind of resource base normally associated with adventure tourism. Once again the Eastern Cape is an outlier, underperforming, with 10 parks but only 66 operators. It seems that for the Eastern Cape potential adventure tourism sites need better marketing and the promotion of local adventure entrepreneurship.

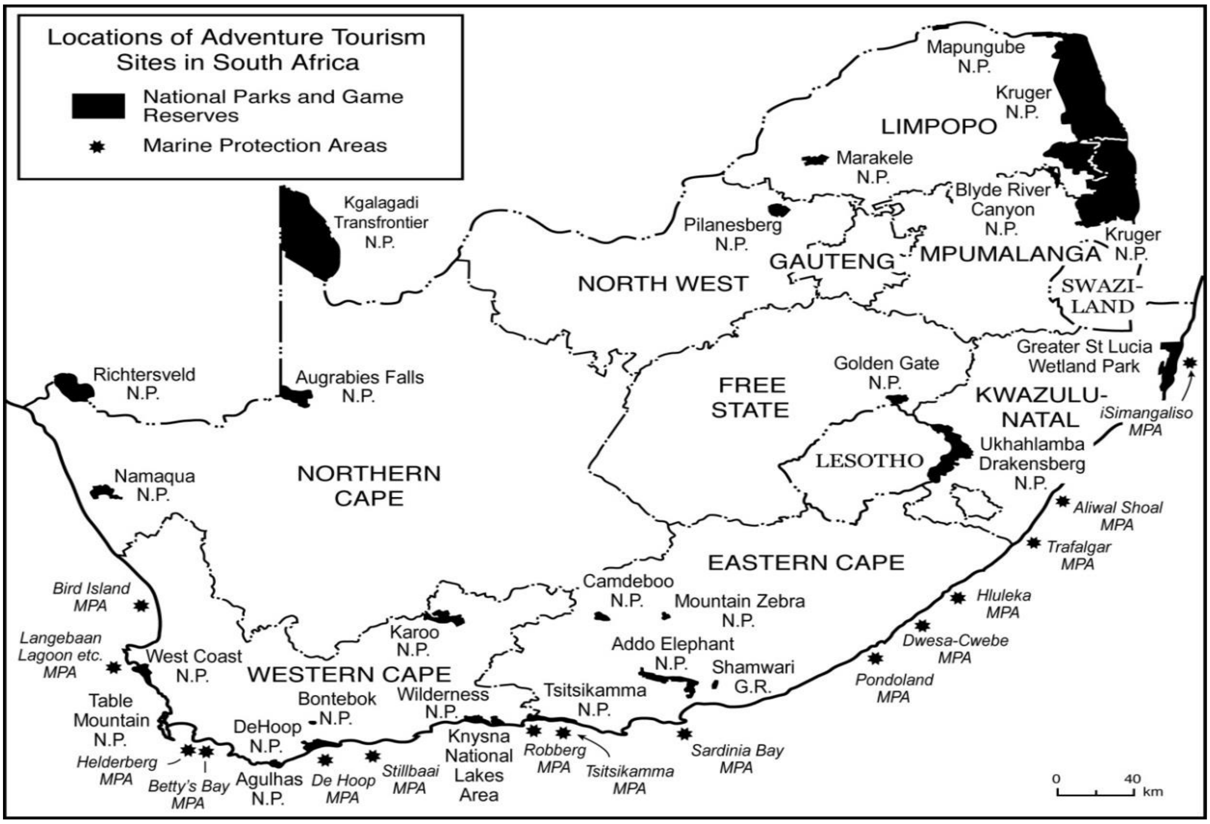

Figure 5: Geographical distribution of national parks, game reserves and marine protected areas across South Africa

Thus, there is a positive relationship between the physical resources associated with adventure tourism, especially sun-sea-sand resources, as well as with national parks, world heritage sites and marine protected areas.

Table 3: Overview of National Parks, Marine Protected Areas (MPA) and World Heritage Sites (WHS), by province, South Africa (Source: Author)

Eastern Cape		
World Heritage Site	**National Park**	**Marine Protected Area**
Cape Floral Region Protected Areas WHS	Camdeboo National Park Addo Elephant National Park and Shamwari Game Reserve The Mountain Zebra National Park Tsitsikamma National Park	Tsitsikamma MPA Bird Island MPA Sardinia Bay MPA Pondoland MPA Dwesa-Cwebe MPA Hluleka MPA
Free State		
Vredefort Dome WHS	Golden Gate National Park	
KwaZulu-Natal		
iSimangaliso Wetland Park WHS Maloti-Drakensberg Park WHS (shared with Lesotho)	Ukhahlamba Drakensberg National Park Greater St Lucia Wetland Park	iSimangaliso MPA Aliwal Shoal MPA Trafalgar MPA
Limpopo		
Mapungubwe Cultural Landscape WHS	Marakele National Park Kruger National Park Mapungubwe National Park	
Mpumalanga		
	Kruger National Park Blyde River Canyon National Park	
North West		
Fossil Hominid Sites of South Africa (Sterkfontein/Cradle of	Pilanesberg National Park	

Humankind WHS		
Gauteng		
Fossil Hominid Sites of South Africa (Sterkfontein/Cradle of Humankind WHS		
Northern Cape		
Richtersveld Cultural and Botanical Landscape WHS	Augrabies Falls National Park Namaqua National Park Kgalagadi Transfronteir National Park Richtersveld National Park	
Western Cape		
Cape Floral Region Protected Areas WHS Robben Island WHS	Agulhas National Park Table Mountain National Park Karoo National Park Langebaan Lagoon, Sixteen Mile Beach, Malgas Island, West Coast National Park Bontebok National Park Wilderness National Park	Robben Island MPA Knysna National Lake Area Marcus Island, Jutten Island MPA Helderberg MPA Bettys Bay MPA Robberg MPA Stillbaai MPA De Hoop MPA

However, a physical resource base that is attractive to tourists will not automatically create a tourism industry; tourists need to be able to reach these areas. With that in mind, the study now turns to examine the extent to which the airline industry and the road network (for tourists who travel by vehicle) supports adventure tourism. It was found that there is no relationship between a province having an international airport and having an adventure tourism industry [R^2=0.0003], an indication that either consumers or adventure tourism products are locals or that provinces with international airports are not doing enough to ‘sweat’ this asset and use it to attract tourists. There is a positive relationship, however, between number of airlines flying scheduled flights into a province and the size of the province’s adventure tourism industry [R^2=0.3915] (see Table 4 and Figure 6). Gauteng is an outlier here, indicating that many of the scheduled flights in this province are for commercial and businesses purposes, not leisure tourism, or those tourists who are flying into Gauteng are not undertaking adventure tourism trips. KwaZulu-Natal is outperforming for the number of flights scheduled, indicating that many of the tourists purchasing adventure trips in this province are not using air transport to access the province. However, there is also a strong relationship between the size of the provincial economy and the number of scheduled flights [R^2=0.8684] reinforcing the earlier conclusion that adventure tourism is a tourism-related product influenced by the size of domestic economy.

Table 4: Airports, airlines and number of operators (Source: Author)

Province	No of international airports	No of airlines flying scheduled flights[1]
Western Cape	1	27
KwaZulu-Natal	1	11
Gauteng	2	49
Eastern Cape	1	9
Mpumalanga	1	5
North West	2	2
Free State	1	3
Northern Cape	1	6
Limpopo	1	3

[1] Across all the airports in that province.

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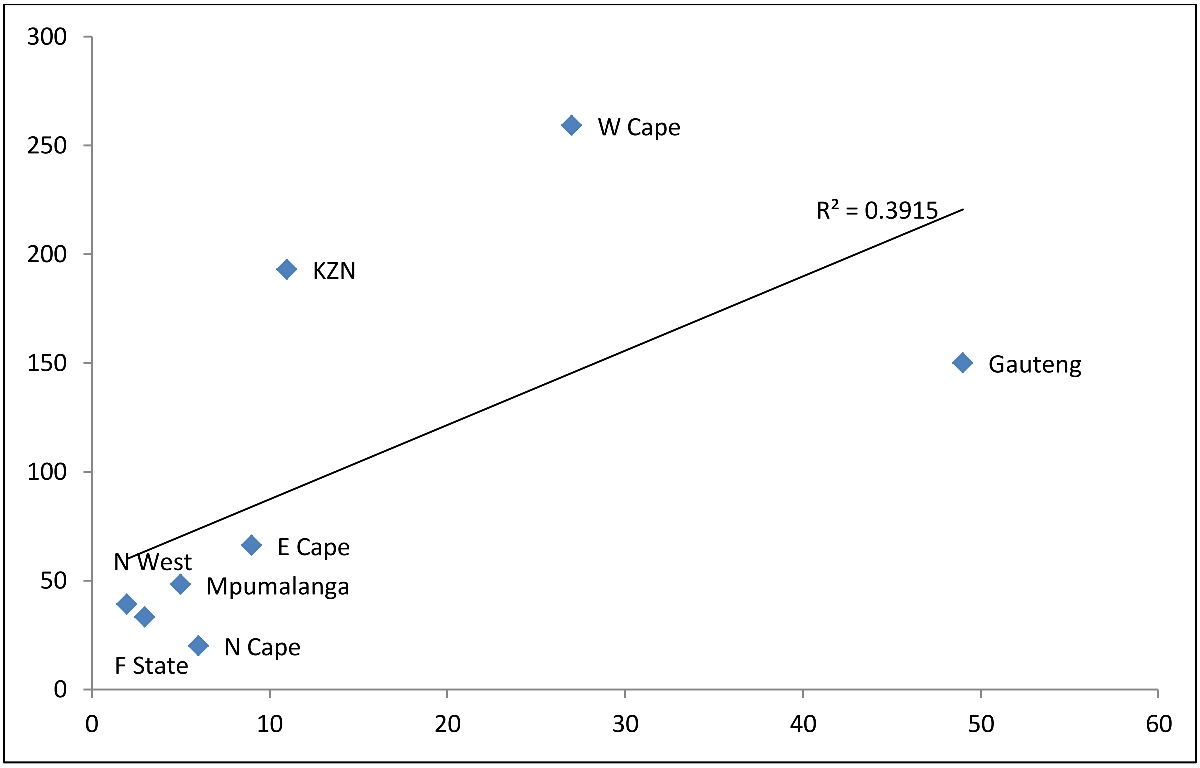

Figure 6: Operators and number of scheduled flights.

While the airline industry does play an important role in supporting adventure tourism, not all domestic tourists are willing or able to make use of this mode of transport to go on holiday. Rather they want to make trips using their private vehicles. This is even true for international visitors, in that while many fly into South Africa (not all do, however), once they are here they will make use of road transportation. Thus, for 2012, 23% of all internal tourism spend was on road transportation (StatSA, 2014). With this in mind, how far tourists must travel by car to undertake an adventure trip across a range of locations in South Africa is explored. These locations were confined to the major settlements in each province. The source markets for domestic tourism were assumed to be the major metropolitan areas of South Africa, namely Cape Town; Johannesburg-Pretoria/Tshwane-Ekurhuleni; Durban/eThekwini and Port Elizabeth/Nelson Mandela. The three metropolitan areas of Johannesburg-Pretoria/Tshwane-Ekurhuleni were considered one unit as they are intimately connected to one another, in terms of urban form, the road network and they all share the major international airport of OR Tambo. Together a total of 302 operators (37%) are located in these four areas, an indication of the demand for adventure tourism products in these regions. In addition, as these regions consist of 17.214 million people, who also, compared to the rest of South Africa, have the highest GDP per capita. Thus, these four areas will be also the main source of domestic tourists. For the purposes of this analysis, distance from source markets was taken from the various airports of these four metropolitan areas, to have one departure point, as it is not known exactly where in the four areas the domestic tourists will originate from. Thus, the airports were considered a central point.

As indicated in Table 5, three categories were created. The first category is those locations that are ‘well placed’ to attract road travellers. These are regions are between 3 to 4 hours (or less) travelling time by private vehicle. Only three destinations fall into this category. The second category is those ‘less well placed’ to attract road travellers. These are regions which require over 600 kms to be travelled by road. Such long distances may result in tourists unwilling to travel to these places for a holiday. At the very least national roads in a good condition are required to promote road travel over such a distance. As nine destinations fall into this second category, overall, the significant distances that the domestic tourist will have to travel by road, and the associated costs of petrol, diesel, and tolls could be suppressing demand for adventure tourism by South African residents. The third category, into which the bulk (21) of the tourist destinations have to contend with, are 'poorly placed'. These are regions that face significant hurdles in terms of attracting domestic tourists by road. These are regions where more than seven - and up to two days driving - is required. Tourists may wish to travel to these destinations but the travelling distance is a major inhibitor. It may be that promoting regular and inexpensive air transport and packaged car hire is required to encourage more domestic tourism to these destinations.

Table 5: Attracting domestic tourists from the following source markets, an analysis by distance

	Johannesburg-Pretoria/Tshwane-Ekurhuleni	Durban/eThekwini	Port Elizabeth (PE)/Nelson Mandela	Cape Town
Well placed to attract domestic tourists	• Polokwane (302kms) • Nelspruit (326kms) • Mmabatho (325kms)			
Less well placed	• Bloemfontein (424kms) • Kimberley (498kms) • Durban (576kms)	• Nelspruit (653km) • Bloemfontein (661kms) • East London (709kms)	• Bloemfontein (657km) • Kimberley (716km)	• PE/Nelson Mandela (739km)
Poorly placed	• East London (982kms) • PE/Nelson Mandela • (1 073kms) • Cape Town • (1 425kms)	• Kimberley (821kms) • Mmabatho (859kms) • Cape Town (859kms). • Polokwane (902kms) • PE/Nelson Mandela • (942kms)	• Durban (942km) • Johannesburg (1 073km) • Mmabatho (1 097km) • Polokwane (1 371km) • Nelspruit (1 395km) • Cape Town (1 636km)	• Bloemfontein (1 001km) • East London (1 017km) • Mmabatho (1 316km) • Johannesburg (1 425km) • Durban (1 636km) • Polokwane (1 716km) • Nelspruit (1 740km)

Note: Distance from destination in km. Source: Author

Summary: overall performance of the adventure tourism industry by province

This analysis has shown that the Western Cape is outperforming on every indicator, as is KwaZulu-Natal (see Table 6). Both of these provinces have a local population that is supporting the industry, but they are also able to leverage their resources to build an adventure tourism sector that draws in tourists. The two worst performing provinces are the Free State and Limpopo. While much of the cause is rooted in the poverty levels of the population of Limpopo in particular, there is a need to further investigate what is holding back the growth of this sector as a tourism-characteristic product in both these provinces. This is especially true considering that neither province is poorly placed in terms of distance from the source market of Johannesburg-Pretoria/Tshwane-Ekurhuleni. Gauteng, while in terms of overall adventure tourism operator numbers is doing well, is revealed here to be under performing in terms of population size and income. This means there is room for additional adventure operators in the province who should specifically target the residential population. As Gauteng is already outperforming its physical resources associated with adventure, the province should consider focusing on building an urban based adventure

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sector, such as indoor climbing walls. Gauteng is also not gaining as much as it could in terms of adventure tourism when the number of scheduled flights is considered. In this case, Gauteng needs to find ways to encourage tourists to stay in the province for longer and, then, undertake an adventure tourist activity. For the Eastern Cape, it is clear that the industry is underdeveloped and there is great scope for expansion. While a large but poor population is holding the province back, there is significant potential in terms of physical resources for the adventure tourism sector to expand and, thus, increase the province's GDP and create employment opportunities.

Table 6: Summary of provincial performance in the adventure tourism industry, relative to one another

Province	By population size	By income		By resources		
		household	Matric and post matric	No of airlines flying scheduled flights[2]	Ratio of Parks, MPAs and WHSs to operators	Physical Resources associated with adventure
Western Cape	OP	OP	OP	OP	OP	OP
KwaZulu-Natal	OP	OP	OP	OP	OP	OP
Gauteng	UP	UP	UP	UP	OP	OP
Eastern Cape	UP	OP	IL	UP	UP	UP
Mpumalanga	UP	UP	UP	UP	UP	UP
North West	UP	IL	UP	UP	IL	IL
Free State	UP	UP	UP	UP	UP	UP
Northern Cape	IL	UP	IL	UP	UP	UP
Limpopo	UP	UP	UP	UP	UP	UP

KEY: OP = outperforming - doing better than what is predicted for the indicator; IL = In line - in line with what can be expected for the indicator; UP = underperforming - based on the indicator the province is underperforming.

Conclusion

This study has revealed that the adventure tourism industry is well established in South Africa with a presence is all nine provinces. It concluded that adventure tourism is both a tourism-related product supported by day trippers and a tourism-characteristic product attracting tourists. The industry is dominated by the provinces that have a combination of many people with high levels of disposable income, in particular white residents, as well as an ability to leverage various tourism resources such as the physical landscape and transportation. Consequently, the sector is distributed geographically unevenly. Overall the industry has scope for growth, across seven of the nine provinces, but especially Gauteng and the Eastern Cape. Policy makers are encouraged to assist these two provinces. For Gauteng the focus should be to further build the day-tripper market and for the Eastern Cape to create a domestic and international tourism market. Additional research should be undertaken to further explore the distribution of operators at a finer grained urban/rural level, as well as undertake a sectoral analysis in terms of type of adventure products on offer.

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[2] No of scheduled flights is also an indicator of income.

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