

Niche Tourism Research and Policy: International and South African Debates

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Abstract

The COVID-19 pandemic is a ‘trigger event’ which is remoulding new patterns of demand and supply for the tourism sector. For policy makers and destination managers it highlights the potential significance of niche tourism products. South Africa is viewed as fertile terrain for the promotion of different forms of niche tourism. The aim is to investigate international and South African research debates concerning niche tourism. The paper analyses the conceptual development of niche tourism, international debates, the (re-) emergence of niche tourism on the policy agenda of tourism stakeholders in South Africa and the state of existing literature and debates surrounding niche tourism in the country. The article represents a contribution to the growing and vibrant scholarship around niche tourism and change in the global South.

Keywords: Niche tourism; tourism policy; special interest tourism; South Africa; COVID-19

Introduction

Trigger events are transformative moments in the evolution of destinations and can include natural hazards, terrorist attacks or pandemics (Prideaux, Laws & Faulkner, 2003; Laws & Prideaux, 2006; Wu, Xu & Wong, 2021). COVID-19 represents such a trigger event which is (re-) shaping destination development pathways across the world and garnering major attention in terms of tourism crisis management research (Booyens, Rogerson, Rogerson & Baum, 2021; Wu et al., 2021). As is observed by Gudkov and Alieva (2021: 142) the COVID-19 pandemic immediately represents “the biggest challenge for the tourism and hospitality sector”. The crisis of COVID-19 “has unexpectedly and significantly disrupted tourism” (Kwok & Koh, 2021: 386) with unprecedented negative consequences most especially for tourism and hospitality workers (Baum, Mooney, Robinson & Solnet, 2020). Globally, consumer anxiety associated with the spread of the virus alongside lockdowns and mobility/travel restrictions have placed the sector in a precarious position (Hall, Scott & Gössling, 2020; Jones & Comfort, 2020; Bhammanachote & Sawangdee, 2021).

The COVID-19 pandemic is catalysing changes in consumer demands as well as necessitating a paradigm shift for research on tourist behaviour and decision making (Brouder, 2020; Sigala, 2020; Assaf, Kock & Tsionas, 2021; Kwok & Koh, 2021; Rogerson & Rogerson, 2021a). Demand is intensifying for safe spaces where social distancing is possible (Kvirkvelia

& Tsitsagi, 2021). The large group movement of people, and therefore the phenomenon of ‘mass tourism’, has been severely compromised as it imposes great health risks with travellers vulnerable to health hazards (Hall et al., 2020; Fotiadis et al., 2021). Recent evidence from China demonstrates that tourists’ destination preferences are significantly reshaped by the COVID-19 pandemic (Li, Gong, Gao & Yuan, 2021) with corresponding differential impacts for urban and rural destinations (Li, Zhang, Yang, Singer & Cui, 2021). Cooper and Buckley (2021) pinpoint the new international importance which is attached in the context of leisure tourism to the maintenance of mental health, including for destination choice. Useful starting points for an African dialogue are provided by Musavengane, Leonard and Mureyani (2020), Rogerson and Baum (2020), and Rogerson and Rogerson (2021b).

Several researchers draw attention to “the all-new tourism due to COVID-19” (Gudkov & Alieva 2021: 142). Arguably, only those destinations that understand the new equilibrium at which global tourism might settle will be able to position themselves appropriately in a post-COVID-era (Assaf et al., 2021). Tourism scholars suggest that in a post-COVID-19 environment the sector is likely to see mobility patterns which are marked by a shift away from large group travel to a preference for smaller groups where the risk of catching an infection is reduced (Chebli & Said, 2020). As a result of risk perceptions surrounding COVID-19, the tourism sector is projected to see an expansion in various forms of special interest or ‘niche travel’ which is driven primarily by the confidence of travelling in smaller groups and a less risk-prone environment (Nair & Mohanty, 2021). One of many consequences of the pandemic therefore is that tourism destinations must re-examine their practices and reflect upon the potential of ‘alternative tourism’ which can assume a significant role in the recovery of the sector (Ioannides & Gyamóthi, 2020). Within the pre-COVID-19 competitive environment of global tourism Farsani and Jamshidi (2020: 110) maintain that similarity is “the market enemy” and that niche products represent “a strategy to escape”. In the ‘new normal’ of a post-COVID-19 world consumers could re-orient further from mass tourism experiences and instead search out what are termed as niche tourism products and experiences (Cevik, 2020; Richards, 2021; Samarathunga & Gamage, 2021). Among others Nair and Mohanty (2021) point out that the COVID-19 pandemic appears to be creating (or re-creating) demand for several forms of niche tourism.

The significant policy ramifications of COVID-19 for changing demand and supply patterns for South Africa’s tourism industry are only beginning to be interrogated through the pursuit of evidence-based research (Rogerson & Baum, 2020; Rogerson & Rogerson, 2021a; Rogerson, 2021). Useful early contributions have appeared to highlight variously its implications for VFR travel (Dube-Xaba, 2021), intentions to travel domestically and changing consumer demand (Bama & Nyikana, 2021), the role of new savings and payment schemes to nourish domestic tourism (Adinolfi, Harilal & Giddy, 2021), impacts for the hospitality sector (Sao Joao, 2021; Sucheron, 2021a), and sector recovery prospects (Dube, 2021). Another thread of research has focused on the uneven geographical impacts of the pandemic and most especially for tourism-dependent destinations (Rogerson & Rogerson, 2020a, 2021c). Issues surrounding government policy response, or lack thereof, to the pandemic also have been explored (Nyawo, 2020; Rogerson & Rogerson, 2020b). Finally, a number of rich empirical studies have examined the adaptations introduced by tourism businesses to address the pandemic’s devastating impacts (Booyens et al., 2021; Giddy & Rogerson, 2021; Rogerson, 2021; Rogerson, Lekgau, Mashapa & Rogerson, 2021).

Niche tourism has been on the radar screen of tourism scholars in South Africa for the past two decades (Rogerson, 2011). In a recent innovative analysis about lighthouse tourism it was observed that “niche tourism and special interest tourism has begun to play an ever more vital role in South Africa following the economic decline that occurred due to the COVID-19

virus and associated lockdowns” (Nel, 2021: 50). COVID-19 introduces the opportunity to investigate tourism offerings in which smaller-scale, controlled and operated niche products can be established to satisfy the changing demands and needs of consumers. South Africa is viewed as fertile terrain for the promotion of a wide range of different forms of niche tourism (South African Tourism, 2021), including through niche market-based tourism routes (Jacobs, 2018). It is against this backdrop that the aim in this paper is to analyse the conceptual development of niche tourism, its (re-) emergence on the policy agenda of tourism stakeholders in South Africa and to offer a review of extant literature and policy debates surrounding niche tourism in the country.

The analysis must be read as a contribution to a growing and vibrant scholarship around tourism and change in the global South (Rogerson & Rogerson, 2021d; Saarinen & Rogerson, 2021). The methodology applied for this study combines the following: (1) a desk-top survey of international and South African research studies on niche tourism which were sourced through Google Scholar and Scopus; and, (2) the collection and review of official South African policy documentation emanating from the Department of Tourism and South African Tourism. Three sets of discussion follow. The next section provides a review of unfolding conceptual debates followed by an international policy and research overview. The last section turns to the South African material.

Niche tourism: Conceptual issues

In terms of its genealogy Weiler and Firth (2021) maintain that the term ‘special interest tourism’ (SIT) first emerged in tourist literature nearly three decades ago and it continues to be applied as a label by tourism scholars, researchers and educators. They aver that special interest tourism is most robust as a demand construct and with reference to special interest travel and special interest travelers. For Ali-Knight (2010) the roots of conceptual debates and academic writings around niche tourism similarly can be traced back to the 1980s with discussions emerging around ‘special interest tourism’ viewed as the predecessor for niche tourism and setting the context for the identification of niche tourism markets.

A benchmark contribution to scholarship was the edited volume on niche tourism which was produced by Novelli (2005). At the outset this work sets out the concept of niche tourism as a counterpoint to mass tourism asserting that it constitutes a “more sophisticated set of practices” and further that amidst “a globalising world of increasing sameness, niche tourism represents diversity and ways of marking difference” (Robinson and Novelli, 2005: 1). Arguably, whilst the concept of ‘niche tourism’ has entered the language of tourism scholarship it lacks clear definition (Macleod, 2003; Ali-Knight, 2010). Its origins are rooted in marketing theory with the concept of ‘niche marketing’ building upon earlier notions of an ecological niche (Bunghez, 2021; Richards, 2021). According to Robinson & Novelli (2005) the discourse around niche tourism is constructed by the producers rather than the consumers of niche tourism. The industry response is to produce an array of products which offer more personalized products to targeted niche markets, resulting in an accelerating fragmentation of the tourism sector (Marques & Cunha, 2010). As highlighted by Kumar, Shekhar and Guleria (2019: 40) niche tourism creates distinct offerings to the consumer “new to their senses and unique experiences attached with the stories and tales that the destination has to offer along with the product”. It is viewed that the suppliers of niche tourism products escape intensified competition in mass markets by seeking a specific niche better suited to them than to their competitors (Richards, 2010, 2021).

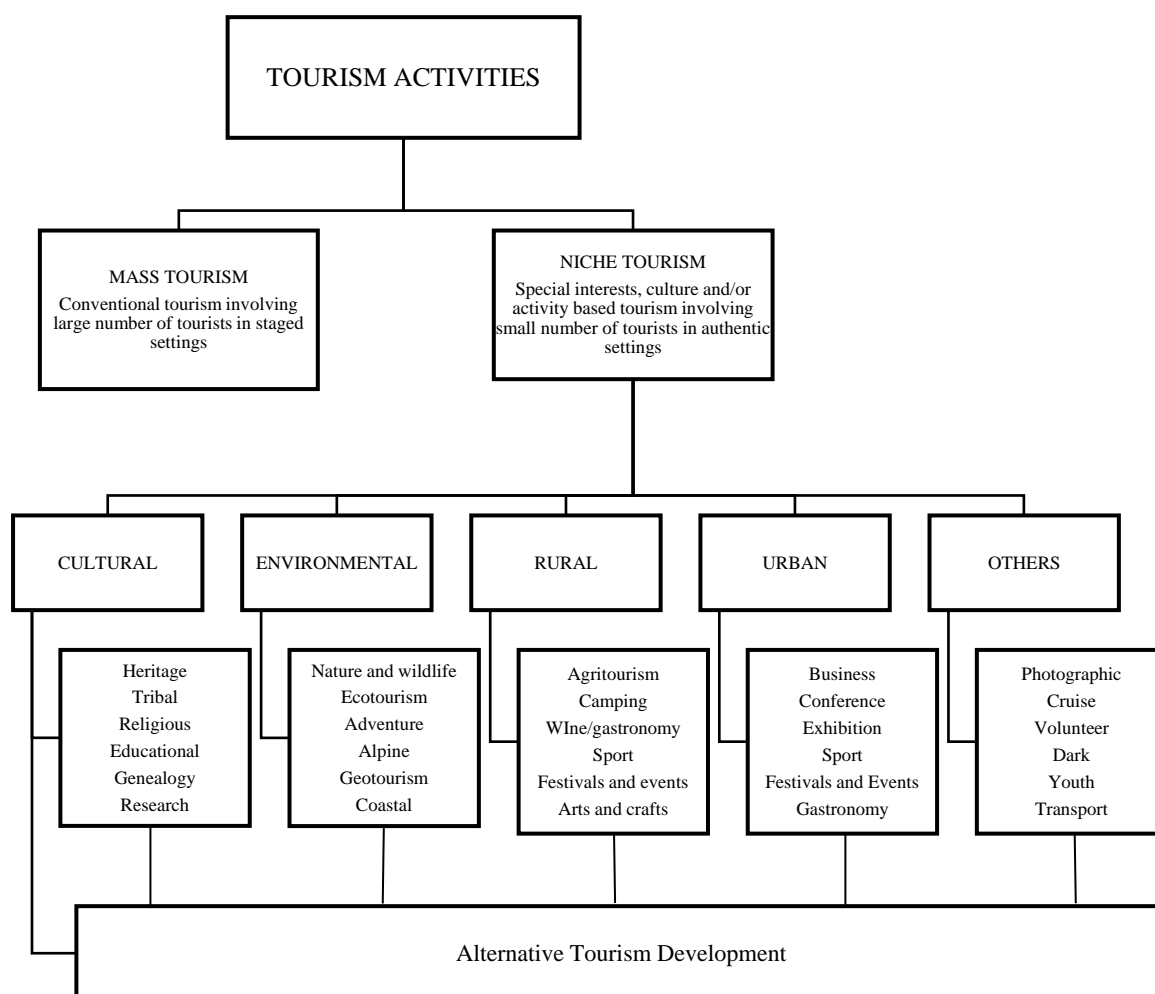


Figure 1: A product supply approach to niche tourism (Adapted after Robinson & Novelli, 2005: 8).

An important observation offered by Robinson and Novelli (2005: 5) is that there are “no formal rules for what can, or what cannot be referred to as niche tourism”. The inevitable consequence of this uncertainty is considerable variation under this umbrella term. The broad consensus as outlined by Ali-Knight (2010) is that at one level niche tourism can be differentiated into a series of ‘macro-niches’ which are seen as relatively homogeneous market sectors. As shown on Figure 1 examples of such macro-niches would be large market segments such as cultural tourism, urban tourism or rural tourism; the category of environmental tourism is also often listed as another macro-niche. Of significance is that each macro-niche is capable of further segmentation into ‘micro-niches’(Ali-Knight, 2010). Figure 1 shows a variety of micro-niches which can be recognised as falling under the rubric of respective macro-niches. At the scale of micro-niches therefore “niche tourism is focused on very precise small markets“ (Robinson & Novelli, 2005: 6). Cheese tourism is perhaps an illustration of a micro-niche that would be difficult to split in greater detail; it is a niche which in recent years has attracted a number of specialist research studies (Fusté-Forné, 2015; Forné, 2016; Fusté-Forné, 2020).

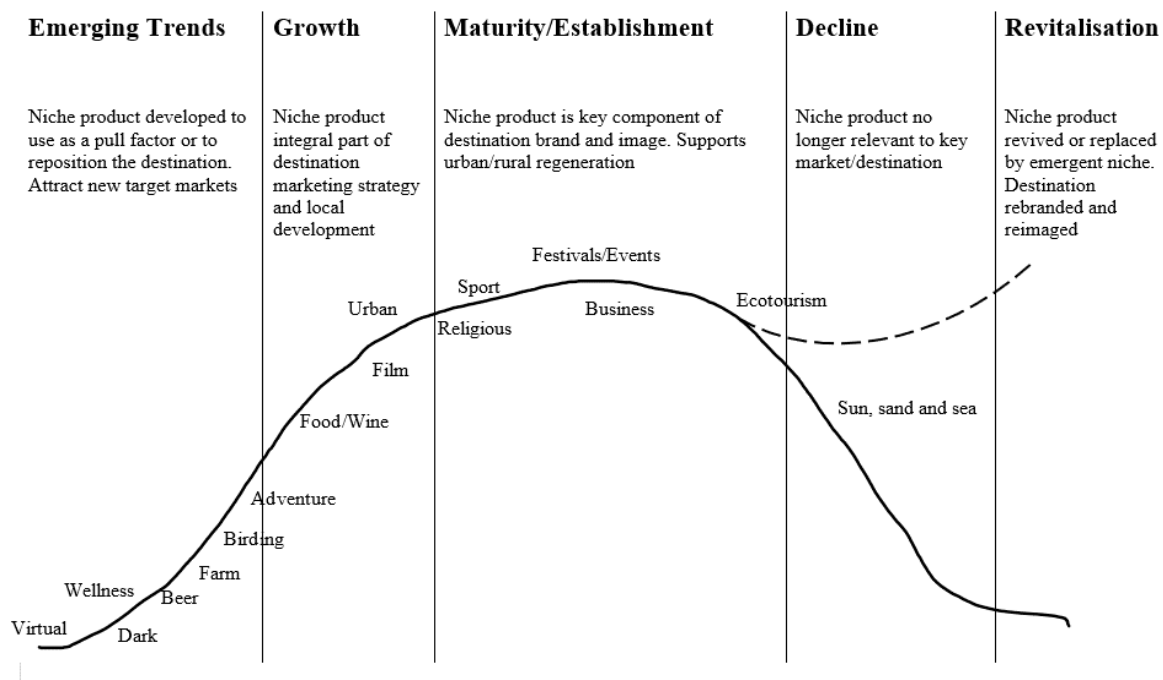


Figure 2: The Niche Tourism Lifecycle (Adapted after Ali-Knight, 2010).

In respect of destination development one critical contribution to scholarship on niche tourism is made by Ali-Knight (2010) who establishes the concept of “the niche tourism lifecycle”. Ali-Knight (2010) builds upon Butler’s (1980) seminal tourism area life cycle model to propose the niche tourism life cycle as shown on Figure 2. Five phases in the life cycle are differentiated which are a parallel with the Butler model (1980). In phase one – emerging trends – a niche product is identified and developed as an anchor or asset for a local destination. In phase two, a growth phase, the product becomes part of a destination marketing strategy. In phase three - a phase in which the niche is now established or mature – the niche product is a key basis for destination development and support for local economic development. In phase four the niche product is in a stage of decline which may be countered by initiatives for revitalisation. Through this model it is possible for policy-makers and destination managers to reflect upon the different phases or stages that particular niches may be in. For destinations the advantages of niche tourism policy development are flagged by Robinson and Novelli (2005) namely, that niche tourism is more sustainable - economically, environmentally, socio-culturally - and favours the development of unique location-specific products as well as lending itself to small-scale operations, local community involvement and the geographical spread of tourism’s economic and social benefits.

Over the past decade there has been a continued expansion of international academic research and debates concerning niche tourism (Misiko, 2013; Sivadasan, 2017; Kumar et al., 2019; Farsani, 2020; Bunghez, 2021). Of particular significance is the recent edited volume of contributions by Agarwal, Busby & Huang (2018) which identifies the almost interchangeability of the terminology of ‘special interest tourism’ with that of niche tourism. It is stressed that these concepts have “clear overlaps” and further “in truth there is little that separates them other than the latter is perhaps more production-centred whilst the former is driven by the consumer’s specific interest-based motivations” (Agarwal et al., 2018: 3). Arguably, the traditional ways of conceptualizing niches have adopted a tourism product supply approach which focuses on an array of products – such as food, film, golf or wine – that

might be developed and emerge as a ‘portfolio’ for particular destinations enabling them to differentiate themselves from competitors. An alternative ‘market-led’ approach concentrates upon the characteristics of special interest tourists – motivations, behaviour and consumption patterns – that would lead to the attractiveness of certain niches. Figure 3 offers a spectrum of special interest tourism which is founded upon issues of consumer motivation.

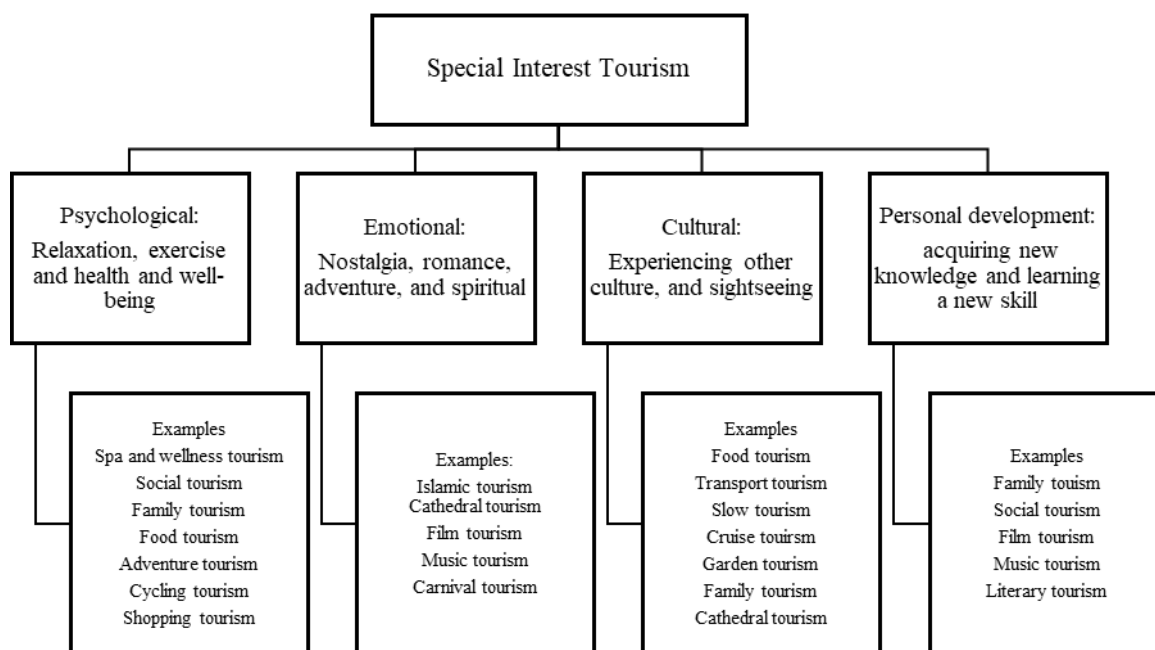


Figure 3: The Spectrum of Special Interests (Adapted after Agarwal et al. 2018: 5)

The most recent conceptual innovations in the scholarship around niche tourism relate to the application of the sociological concept of ‘neo-tribes’. Pforr, Dowling and Volgger (2021) maintain that use of the term neo-tribe allows a change in perspective away from special interest tourism being understood simply as the sum of similarly motivated individuals to instead a collective view of special interest tourists who share common characteristics (shared values, beliefs or mutual interests) and group structures. These authors assert that such a perspective shift affords a better understanding of groupings that are not unified by any common tourism motivation rather are brought together by conditioned commonalities in actual behaviour. Pforr, Volgger and Downing (2021) elaborate further that the term special interest tourism is now framed primarily as a demand concept, which is experiential and driven by special interests, whereas the term ‘niche tourism’ offers a supply perspective.

From the above standpoint many tourism niches can be reinterpreted therefore as consumer neo-tribes in which individuals are embedded and bound together, albeit if often loosely. Among several examples are those of geological tourists who are regarded as ‘geo-experts’ or ‘geo-specialists’ and often comprise professional or amateur geologists who possess a good understanding of geology. For Dowling, Allan and Grünert (2021) this tribe have a strong desire to place geology at the centre of their travels. Likewise, Croy, Reichenberger and Benjamin (2021) pinpoint film tourists as a similarly motivated neo-tribe. Sporting activities are another arena for the emergence of neo-tribes. For example, Holt (2021) tracks the shift of surfing from a counter-cultural lifestyle into a mainstream sports activity and shows that surfing communities exist as tribes which are distinguishable by beliefs, values and history. The boom in cycling tourism including road cyclists, mountain bikers and trekking cyclists provides another example of a tourism tribe aligned to sport. Finally, Steven, Rakotopare and Newsome

(2021), whilst highlighting the diversity of the bird watching niche market and the variations in terms of the tourism experiences that they seek, stress the unifying theme for this neo-tribe that almost all avitourists expect to view groups of wild birds as opposed to captive species.

Niche tourism: International policy debates

The tempo of international policy debates on niche tourism is on the rise. Ali-Knight (2010) contends that niche tourism is a response to the expansion of more sophisticated tourists demanding specialist tourist products and allows destinations to focus and differentiate their offerings in a cluttered tourism environment. For destination managers a critical issue is that “as well as niche tourism based around what tourists do, there is also a geographical dimension by which locations with highly specific offers are able to establish themselves as niche destinations” (Robinson & Novelli, 2005: 6). One of the clearest examples of geographical differentiation is the emergence of gastronomic destinations which are anchored on localism, local foods and distinctive cuisine. An extensive literature maps out the experience of a range of destinations – urban and rural - in which local tourism is firmly anchored upon the potential of the micro-niche of gastronomy (eg. Chand, Dahiya, & Patil, 2007; Beltrán, Cruz, & López-Guzmán, 2016; Gálvez, López-Guzman, Buiza, & Medina-Viruel, 2017; Privitera, Nedelcu, & Nicula, 2018; Bütün & Öncel, 2019; Othmani, 2021; Woyesa & Kumar, 2021).

For Bunghez (2021: 1) niche tourism “can be linked to the particular natural and anthropogenic resources of a region” as well as to “the characteristic lifestyle of the tourists that engage in this type of activity and their social status and their financial resources”. It is viewed the development of micro-niches can be a potentially valuable driver for tourism expansion especially in peripheral regions (Fusté-Forné, 2015, 2020; Gálvez, Gallo, Medina-Viruel, & López-Guzman, 2021). Richards (2021) advocates a consideration of niche markets for spurring tourism competitiveness especially in peripheral regions of the European Union. Dinis & Krakover (2016) identify the potential contribution of niche products for the development of sustainable tourism in small peripheral localities of Portugal. In the context of the Global South Iran has been the focus for the growth of a rich literature on various forms of niche tourism, including art tourism (Nikoo, Farsani & Emadi, 2020), creative tourism (Farsani, Ghotbabadi & Altafi, 2019), music tourism (Farsani, Shafiei, Adilinasah & Taheri, 2017), ghetto tourism (Farsani, 2020), historical nostalgia tourism (Shiran, Forsani & Rizi, 2020), herbal-based tourism (Farsani, Zeinali & Moaiednia, 2018), mining tourism (Farsani, Bahadori & Mirzaei, 2020), and geotourism (Shafiei, Farsani & Abdollahpour, 2017). For Kenya, Misiko (2013) documents that niche tourism is viewed as one avenue for sustainable tourism product diversification; in Ethiopia Woyesa & Kumar (2021) explore opportunities for enset-based culinary tourism.

Across several countries tourism policy makers have embraced the promotion of niche tourism and of niche tourism products (Macleod, 2003; Blichfeldt & Pedersen, 2010; Marques & Cunha, 2010; Farsani, 2020). Some of the best documented countries which have instituted policy initiatives for niche tourism development are Romania (Gheorghe, 2014; Gabor & Oltean, 2019), Malaysia (Sivadasan, 2017), Sri Lanka (Samarathunga & Gamage, 2020) and India (Prabakaran & Panchanatham, 2013; Kumar et al., 2019; Beigi, 2020; Bandam & Ravi, 2021). In India Malik (2018: 80) records that the national Ministry of Tourism “has started an initiative to recognize, develop and foster niche tourism products”. In both India and Sri Lanka much policy interest surrounds forms of niche tourism such as wellness, yoga, tea tourism, Ayurveda and spiritual tourism (Malik, 2018; Samarathunga & Gamage, 2020).

According to the World Tourism Organisation and the World Travel & Tourism Council niche tourism is viewed as more valuable for host communities than traditional modes of tourism because of its greater spending in destinations (Farsani, 2020). Arguably, the

concept of niche tourism is compelling for tourism policy makers and destination managers as a vehicle for promoting sustainable development and inclusion. The niche tourism approach appears to promise “greater opportunities and a tourism that is more sustainable, less damaging and, importantly, more capable of delivering high spending tourists” (Robinson & Novelli, 2005: 1). For tourism policy makers concerned with ‘responsible’ tourism the attractions of supporting niche tourism are in light of its implied small-scale character and of the discerning and sensitive nature of niche tourists (Novelli & Benson, 2005). In addition, niche tourism is considered as having the potential to advance the goals of an inclusive and sustainable economy.

Niche product development can be used potentially also to address problems of seasonality for destinations (Malik, 2018; Bandam & Kumar, 2021). Richards (2021) maintains that a consideration of niche markets is crucial for local and regional development futures as increasing competition in the pre-COVID era forced destinations to seek to specialize and differentiate themselves from others. However, for successful niche tourism development in any country the need is acknowledged for strategic intervention in the form of policy support which, in turn, demands evidenced-based research in order to inform policy interventions (Jones, 2010).

The COVID-19 pandemic further underscores the relevance of developing strategic interventions targeted to the requirements of specific niches and which are informed by an understanding of the changing supply-demand situations of particular niches in the continuing environment of COVID-19 (Samarathunga & Gamage, 2020). Spice tourism represents one example of a form of niche tourism which is considered to be an ‘emerging sector’ in the COVID-19 environment. Nair & Mohanty (2021: 2) argue that “spice tourism could be expanded due to spices’ immunity-boosting properties – specifically Indian kitchen spices such as turmeric, cardamom, fenugreek, garlic and pepper”. The health benefits and immune-boosting properties of these spices are seen as core assets to be exploited for niche tourism. Overall, for spice-producing countries such as India, Sri Lanka, Guatemala, Mexico and Jamaica the niche of spice tourism is viewed as a highly promising opportunity given the COVID-19 environment.

It should not be understood from the foregoing discussion that a strategy for development of niche tourism is unproblematic. A highly critical commentary of the challenges surrounding niche tourism is provided by O’Regan (2017). It is contended that the claims in respect of sustainability may be exaggerated as niche tourism remains burdened with the cultural, political and environmental concerns of the tourism industry as a whole. Indeed, as a niche attracts the attention of larger enterprises the danger exists that they may expand each niche to full potential by exploitative means (O’Regan, 2017). Finally, the local economic benefits of niche tourism development for destinations must be questioned. Arguably, niche tourism development in communities can be compromised if those involved lack the professional skills and experience to successfully attract and satisfy the demands of niche tourists. Overall, O’Regan (2017: 904) considers that niche tourism in many instances “may not offer a solution to those destinations seeking more sustainable tourism, or tourism more integrated to the real economy than mass tourism”

Niche tourism in South Africa: Policy and research

Within Africa the most advanced policy developments and initiatives regarding niche tourism have taken root in South Africa. Policy interest by government in niche tourism in South Africa is not a recent phenomenon. It pre-dates the COVID-19 crisis and observed that policy interest concerning niche tourism in South Africa goes back to 2004-5 with the work undertaken by the Tourism Unit within the Department of Trade and Industry (DTI) which formerly had

responsibility for tourism development (Rogerson, 2011). With the establishment of a separate Ministry for Tourism in South Africa further interest has occurred by policy makers in niche tourism.

During 2010 the new Department of Tourism launched its National Tourism Strategy within which a role for niche tourism was isolated (Department of Tourism, 2010: 121-123). Interest in niche tourism policy development was maintained following the Strategy's appearance and growing influence. The clearest statement of the Department of Tourism's policy focus on niche tourism was a speech made by Tokozile Xaza in 2015 in the promotion of the niche of heritage tourism. At the outset the Deputy Minister of Tourism acknowledged as follows: "Tourists are now looking for more niche markets" and quoted estimates from the United Nations World Tourism Organization that "40 per cent of all global tourists are in search of culture and heritage experiences" (Ministry of Tourism, 2015). In an important statement it was made clear that "a key objective of the National Tourism Sector Strategy (NTSS) are (*sic*) to ensure that newly developed niche tourism products are developed in order to grow the tourism industry in support of its global competitiveness" (Ministry of Tourism, 2015). The Deputy Minister viewed heritage tourism as "one of the important niche tourism products that have been identified in support of tourism growth" (Ministry of Tourism, 2015).

In November 2017 the Department of Tourism issued its revised National Tourism Sector Strategy spanning the period 2016-2026. The vision of this strategic framework was stated for the making of a "rapidly and inclusively growing tourism economy that leverages South Africa's competitive edge in nature, culture and heritage, underpinned by Ubuntu and supported by innovation and service excellence" (Department of Tourism, 2017: 16). Once again considerable recognition was accorded in this strategic document to the policy significance of niche tourism. For example, it was noted that "special interest tourism (niche tourism) accounts for many particular motivations of leisure and purpose travel, including birding, food and wine tourism, medical tourism, eco-tourism, science tourism and cruise tourism" (Department of Tourism, 2017: 9). In addition, niche tourism development was given a notable prominence in suggested policy interventions to enhance the visitor experience. It was proposed that provinces and the tourism industry players should provide the lead in order to "investigate and develop tourism niche market products with the highest ability to attract more travelers in line with the competitiveness of a locality" (Department of Tourism, 2017: 27-28). Potential niche tourism products that were identified now included marine and coastal tourism, science tourism and adventure tourism. Of note is that the key deliverables were to include, *inter alia*:

- A priority list of niche market experiences to be developed;
- Prioritised niche tourism strategies in place; and
- Progress on the implementation of the prioritised niche markets (Department of Tourism, 2017: 27-28).

In 2018 the Department of Tourism's transformation strategy for the tourism sector flagged the need for infrastructure development aligned to the development of niche tourism projects (Department of Tourism, 2018: 35). Further commitment of the Department of Tourism to niche tourism was reiterated in the preparation of a National Tourism Research Agenda circulated at the 7th National Tourism Conference held in 2019. Among a range of research topics that were identified was that of niche tourism with particular niches that were mentioned including those of 'township tourism' and 'food tourism'.

It is observed that over the decade of policy affirmations to niche tourism there has been little continuity in the particular forms of niche tourism to be prioritised. This said, the significance of strategic interventions for critical niches in tourism was emphasized in a 2020 Economic Survey report on South Africa produced by the Organization of Economic Cooperation and Development (OECD) (Glocker & Haxton, 2020). The 2021 Tourism Sector Recovery Plan issued by South African Tourism is government’s major policy statement in response to re-energising the tourism economy in the COVID-19 environment (South African Tourism, 2021). It recognises that re-igniting demand requires a robust marketing strategy, the agility to respond decisively through an uncertain global re-opening phase and responsiveness to changes in consumer preference that require a focus on intrepid, experiential traveller segments which include niche tourism development. The pandemic further underlines the importance of developing interventions that are targeted to the requirements of specific niches.

Table 1: The landscape of niche tourism research in South Africa

Type of Niche Tourism	Examples of Research Studies
Adventure	McKay, 2013, 2014, 2016, 2017; Giddy, 2018a, 2018b; Giddy and Rogerson, 2018; Giddy and Webb, 2018; McKay, 2018, 2020
Astro-tourism	Ingle, 2010; Jacobs, 2018; Jacobs, du Preez and Fairer-Wessels, 2020
Avitourism	Biggs, Turpie, Fabricius and Spenceley, 2011; Nicolaides, 2012; Rogerson, Simango and Rogerson, 2013
Beer	Rogerson and Collins, 2015a, 2015b, 2019
Cannabis	Henama, 2020
Coastal and Marine	Bob, Swart, Ngalawa and Nzimande, 2018; Rogerson and Rogerson, 2020c
Creative	Rogerson, 2006; Booyens and Rogerson, 2015, 2019; Drummond and Drummond, 2021
Cruise	Rink, 2020; Sucheran, 2021b
Dark	Proos and Hattings, 2020
Film	Poole and Van Zyl, 2020
Gastronomy	Du Rand and Heath, 2006; Ferreira and Muller, 2013; Ferreira and Hunter, 2017; Naicker and Rogerson, 2017; Rogerson and Rogerson, 2021e
Gay	Visser, 2002, 2003; Rink, 2013
Geotourism	Mukwada and Sekhele, 2017; Du Preez, 2019; Matshusa, Thomas and Leonard, 2021
Golf	Tassiopoulos and Haydam, 2008
Halal	Bhoola, 2020
Heritage	van der Merwe, 2013; van der Merwe and Rogerson, 2013, van der Merwe, 2014; Rogerson and van der Merwe, 2016; van der Merwe and Rogerson, 2018
Lighthouse	Nel, 2021
Literary	Stiebel, 2004, 2010; Smith, 2013; Stiebel, 2013, 2019
Nudism	Blackmore, 2020
Off the Beaten Track	Opfermann, 2021
Polo	Daniels and Spencer, 2019
Volunteer	Stoddart and Rogerson, 2004; Rogerson and Slater, 2014
Wedding	Rogerson and Wolfaardt, 2015; Fitchett and Mahlangu, 2019

Source: Authors

The current state of niche tourism in South Africa is a subject that requires further investigation. In terms of the niche tourism cycle as proposed by Ali-Knight (2010) it can be argued that several of the earliest niches to be established and promoted in South Africa, such as business tourism, wine tourism and cultural tourism have now reached the phase of maturity. Events tourism would also fall into such a categorisation. In addition, it would be accepted that ecotourism is no longer an emerging niche except perhaps only in the context of urban areas

(see Burton et al., 2020). In terms of the categories of emerging trends of micro-niches or those which are in a growth phase Table 1 provides illustrative examples of existing South African research studies. The listing of research examples cannot be claimed as comprehensive but merely indicative of the appearance of a research interest. Further, in the wake of COVID-19 impacts and changing mobilities the listing of certain micro-niches such as cruise tourism might be open to question. Beyond the niche studies in Table 1 one must acknowledge also works produced, for example, by Jacobs (2018), Ferreira (2020) and Jacobs et al (2020) which draw attention to the vital role of niche tourism in the spread of tourism routes in rural areas.

It is evident tourism geographers have been particularly active in advancing research on niche tourism in South Africa during the past decade (Rogerson & Visser, 2020). Looking forward, a comprehensive research programme is required to support niche tourism policy development. In particular, such an initiative might address knowledge-gaps about the changing supply-demand situations of particular niches during and post COVID-19 to inform evidenced-based policy interventions, decision-making and strategy formulation. Beyond contemporary studies, however, there is an argument also for pursuing historical research investigations into the evolution of specific niches (eg. Rogerson & Rogerson, 2021f).

Conclusion

It is stressed that “in no uncertain terms, the pandemic has forever changed the tourism industry as we once knew it” (Sin, Mostafanezhad & Cheer, 2021: 655-656). The uncertain times of COVID-19 are resetting tourism research agendas in Africa (Rogerson & Rogerson, 2021b). For the pre-COVID-19 era it could be observed that “the development of niche tourism is widely acknowledged as a major trajectory in contemporary tourism” (Robinson & Novelli, 2005: 7). In the post-COVID-19 era competitiveness and growth of destinations must hinge, at least in part, upon their capacity to understand and adapt to the new equilibrium at which tourism may reach (Assaf et al., 2021). Although the shape of that new equilibrium remains unclear a strong case can be made for the relevance of niche tourism development and in particular in a Global South context. Within sub-Saharan Africa the South African experience of policy development and niche tourism promotion is the most advanced. Niche tourism development has been mentioned as on the agenda of national tourism policy makers continuously since 2000. With the continuation of the COVID-19 pandemic the significance of niche tourism is reinforced for tourism policy and planning as consumer demands shift from ‘mass attractions’ to smaller-scale forms of tourism. Arguably, if appropriately planned and developed, niche tourism can be an element for tourism recovery planning. This reinforces the relevance of an extended research agenda to understand the potential for niche tourism and for investigations on critical micro-niches in order to provide an evidence base for informing appropriate policy interventions.

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