African Journal of Hospitality, Tourism and Leisure, Volume 8 (4) - (2019) ISSN: 2223-814X

Profile characteristics of marine tourists

Dr A.G. Jonas
Department of Marketing Management
Nelson Mandela University, 2nd Avenue Campus
Port Elizabeth, 6000, South Africa
E-mail: Altouise.Jonas@mandela.ac.za

Professor L. Radder
Department of Marketing Management
Nelson Mandela University, 2nd Avenue Campus
Port Elizabeth, 6000, South Africa

Professor M. van Eyk
Department of Marketing Management
Nelson Mandela University 2nd Avenue Campus
Port Elizabeth, 6000, South Africa

Corresponding author*

Abstract

Marine tourism is one of the fastest growing types of tourism worldwide, yet, relatively little is known about individuals who participate in marine tourism activities. It is critically important for marine tourism businesses to know who their customers are as this information will enable them to design a suitable marketing program which appeals to their market segment. Marine tourism businesses will therefore have to develop a profile of their market segment in order to establish who their customers are. The primary objective of this study was to establish a profile for tourists who participated in shark-diving, whale-watching and visits to marine protected areas (MPAs) in South Africa. A further objective was to compare the profiles of the tourists who participated in the selected activities in order to identify differences or similarities between these groups. The selected activities all form part of the leisure category of marine tourism activities. Knowledge of the differences or similarities in the profiles of these groups can help marine tourism businesses decide whether the same marketing program can be directed at all three groups. This knowledge can also be used in directing the identification and development of suitable marketing strategies for attracting and penetration of the market. A descriptive design and quantitative approach was followed and the survey responses of 444 respondents were analysed through frequency distribution and multivariate analysis of variance. Statistically significant differences were found in gender, age, level of education and nationality among participants in the various activities.

Keywords: Profile, marine tourism experience, shark-diving, marine protected areas, whale- watching.

Introduction

Tourism, one of the largest (Cooper & Hall, 2013) and most important (Cooper, 2012) service industries globally, is heralded as having significant potential for enhancing global economic recovery of countries (Brand South Africa, 2018). The industry aids economic recovery through foreign exchange earnings, job creation (World Tourism Organisation, nd), exports and the multiplier effect (Shakouri, Yazdi, Nategian & Shikhrezdei, 2017). In addition, the tourism industry is recognised as one of the biggest income providers for many developing countries such as South Africa (World Tourism Organisation, n.d.) and is regarded as a resilient and continuously

growing industry (Cooper, 2012). This growth is displayed by the increase in contributions made by the industry year on year, globally and in South Africa. For example in 2017, the travel and tourism industry made a total contribution of USD8,272.3bn to the global GDP (World Travel and Tourism Council, 2018) and supported 313,221,000 jobs worldwide (World Travel and Tourism Council, 2018). This growth is also demonstrated by the South African tourism industry, with a contribution of R118.6 billion to the local economy in 2015 (World Travel and Tourism Council, 2016), and the expectation that these figures will continue to rise (South African Business Integrator, 2017). However, this depends on the collaboration between government, business and many social partners and their ability to implement the revised national tourism strategy which focuses on reducing barriers for travel to South Africa, more effective international and domestic marketing, enhancing the visitor experience and improved destination management (South African Government, 2019).

South Africa with its mild climate, breathtaking scenery, and diversity of attractions has become a very appealing destination for many visitors (Brand South Africa, 2018). The country is also home to many internationally well-known attractions; and offers a myriad of tourist activities (Allen & Brennan, 2004), of which marine-related activities (for example: beaches, shark-cage diving, whale-watching) are among the top-ten rated tourist activities (South Africa, n.d).

Given that marine tourism is one of the fastest growing types of tourism worldwide (Damanaki, 2016) and especially in South Africa, one would expect increased research into the field. However, marine tourism in South Africa is still under-researched (Department of Tourism, 2017; Geldenhuys, 2014). Existing studies have focused mostly on marine tourism's impact on host regions and communities (e.g Dicken, 2014; Mograbi & Rogerson, 2007; Myeza, Mason & Peddemors, 2010), and tourists' motives for travelling to marine destinations (e.g. Saayman, Slabbert & van der Merwe, 2009). Interestingly, there appears to be a little research into the profile of those who participate in marine tourism activities in South Africa.

This lack of research could be due to the fact that marine tourism is not a well-defined segment in the tourism discipline as numerous definitions exist for the concept. For example Orams (1999:9) defines marine tourism as "those recreational activities that involve travel away from ones place of residence and which have as their host or focus the marine environment (where marine environment is defined as waters which are saline and tide affected)". Tourism Development International (2007:18) defines marine tourism as "the sector of the tourism industry that is based on tourists and visitors taking part in active and passive leisure and holiday pursuits or journeys on (or in) coastal waters, their shorelines and their immediate hinterlands". Jennings (2007:10) refers to marine tourism as water-based tourism and defines water-based tourism as "any activity undertaken in or in relation to water resources, such as lakes, dams, canals, creeks, streams, rivers, waterways, marine coastal zones, seas, oceans and ice-associated areas. Water-based tourism activities include sailing, fishing, surfing, boating, scuba-diving, snorkeling, big game fishing and motorised sports. This leads to difficulty when attempting to determine the motivations and segment differences within the marine tourism market. However, it is important for marine tourism providers to establish whether differences exist as this will enable them to divide the market into smaller segments with unique needs, characteristics and behaviours (Kotler and Armstrong, 2014). But, first marine tourism providers would have to identify different ways to segment the market for example by means of demographic, geographic, psychographic or behavioural segmentation. Thereafter, profiles can be established based on the identified segments. This profile can assist marine tourism providers to fairly objectively identify, quantify

and locate segments (Pulido-Fernández & Sánchez-Rivero, 2010). Focus on a specific segment in turn helps reduce costs since the business will know who its target market is and where to locate them. Furthermore, the information contained in the profile can be used for product development and the development of a focused communication strategy (Hubbard, 2018). Having a focused communication strategy will enable businesses to tailor their message to appeal to a particular market, and will ensure that the correct mediums are used to reach the market (Hubbard, 2018). Ultimately, the demographic profile of marine tourists will help tourism providers compete more successfully as their marketing plan and resources will be concentrated on a specific segment of the market (Hubbard, 2018).

Whilst studies specifically focusing on the profile of marine tourists in South Africa were hard to find, a few studies dealing with the profile of tourists elsewhere in the world could be traced. For example, Ginty (2010) grouped marine tourists into four broad classifications based on their level of dedication and the amount of time spent on participating in marine tourism activities. The subsequent groups were referred to as hard-core, dedicated, mainstream and casual marine tourists. Like Ginty (2010), Bentz, Lopes, Calado and Dearden (2016) also focused on non-demographic profiles and classified marine tourists as specialists or generalists depending on their level of experience and commitment to the activity. Demographic profiling of marine tourists have been done by Altobelli (2011) who focused on uncovering the characteristics of participants in shark-diving at selective dive sites in Fiji. Buultjens, Ratnayake, Gnanapala and Nedelea (2018) examined the profile of whale-watching tourists in Sri Lanka with a specific focus on the individuals' experiences and spending patterns, while Parsons, Warburton, Woods-Ballard, Hughes, Johnston, Bates and Lück (2003) investigated the nature of whale-watchers in Scotland, and Queiroz, Guerreiro and Ventura (2014) aimed to identify the profile and type of ecotourist that visits the Azores. However, none of these studies attempted to identify the profile of marine tourists in South Africa. The current research aims to help fill this void as the objective of the study is to identify and compare the demographic characteristics of tourists who participate in selected marine tourism activities namely; whale-watching, shark-diving and visits to marine protected areas (MPAs). This information will assist marine tourism providers to promote and sell experiences that will appeal to their identified niche markets.

This paper starts by reviewing the literature on the three selected activities (whale-watching, shark-diving and visits to MPAs) and profiling marine tourists. This is followed by the research methodology and the results. Thereafter a discussion of the results and the managerial implications, and a conclusion is presented.

Literature Review

Marine tourism is defined as "the sector of the tourism industry that is based on tourists and visitors taking part in active and passive leisure and holiday pursuits or journeys on (or in) coastal waters, their shorelines and their immediate hinterlands" (Tourism Development International, 2007). Marine tourism activities can be grouped into three categories, namely (Tourism Business Africa, 2014):

- boating and cruising - which includes yachting, cruising and ferrying;
- sports and recreation – which includes marine activities, such as diving, swimming and sailing; and

- the leisure category – consisting of eco-marine tourism such as visits to marine protected areas (MPAs), and adventure and viewing tourism; for example, whale-watching and shark diving respectively. The current study focuses on the leisure category.

As previously mentioned, marine tourism activities have become very popular in South Africa. This popularity could be attributed to the country having a coastline extending more than 2 500 kilometres and being home to one of the most diverse marine systems in the world (WWF, 2016), making it suitable to diverse tourism activities. As pointed out in the previous section, the current study focuses on the leisure category of marine tourism, and in particular, on shark diving, whale-watching, and visits to MPAs.

Whale-watching has arguably become South Africa's best known marine tourism activity (Saayman, 2014), while shark diving is a relatively new but a rapidly growing activity (Hara et al, 2003 as cited in Dicken & Hosking, 2009; Gallagher & Hammerschlag, 2011). Shark-cage diving is used by the shark-diving industry to enable participants' interaction with the sharks (Vianna, Meeuwig, Pannell, Sykes & Meekan, 2011). Marine protected areas assist in protecting the marine environment and help satisfy needs such as education, fisheries management, recreation and income generation (Hockey & Branch, 1997). These three activities are subsequently discussed in more detail.

Whale-watching

Commercial whale-watching started in 1955 in southern California and was focused on viewing the endangered grey whale migrations passing the coastline (Hoyt & Parsons, 2013). Since the 1980's there has been a rapid global increase of participation in whale-watching tours (O'Connor, Campbell, Cortez & Knowles, 2009) which resulted in this sector experiencing faster growth compared to many other tourism sectors over the past decades (Filby, Stockin & Scarpaci, 2015).

Whale-watching in South Africa is following the global trend, and the country is already ranked as the fifth fastest growing whale-watching destination in the world (WhaleRoute.com, 2014). Furthermore, boat-based whale-watching generates R120 million on average in tourism expenditure (Hatchuel, 2016) and contributes approximately R37 million to South Africa's GDP (Department of Environmental Affairs & Tourism, 2006).

The southern African waters play host to a relatively high cetacean diversity as over 19 species have been recorded in local waters (Stuart & Stuart, 1988). However, only five cetacean species, including three baleen whale species are sighted often enough to support any kind of whale-watching tourism (Apps 1996 as cited in Department of Environmental Affairs and Tourism, 2005). Only three of the most frequently sighted species are targeted by whale-watchers namely: Southern Right, Humpback whales and Bryde's whales (WhaleRoute.com, 2014), with the Southern Right whales being the most well-known attraction in the country (Findlay, 1997:57).

Important research into whale-watching activities include the work of Parsons et al (2003). These authors sought to determine who goes whale-watching in west Scotland, what motivates individuals' participation in this activity, and their level of awareness of cetaceans. The findings showed that the majority of participants were middle-aged female domestic tourists accompanied by children, have a good education and were from the middle social class (Parsons et al, 2003). Lück's (2015) study focused on participants of whale and dolphin tours in New Zealand. The

demographic profile showed that the majority of respondents were female and younger than 40 years old, with only 10% of respondents being older than 60. More than 80% of the respondents were well educated with some form of tertiary qualification, while only 2% of respondents had no formal qualification. It is important to determine the characteristics of whale-watchers in South Africa as this will provide South African whale-watching businesses with a competitive advantage because they will be better equipped to reach their customers.

Shark-diving

Shark-diving tourism is a growing global industry that provides participants with an opportunity to view sharks underwater by means of snorkeling or scuba-diving (Gallagher & Hammerschlag, 2011:799). The shark-diving industry has become an important niche market in the tourism industry (Ziegler & Rollins, 2012:699) as it annually caters to more than half a million participants at over 300 sites (Carwardine & Watterson 2002 as cited in Dicken & Hosking 2009) in 85 countries (Gallagher, Vianna, Papastamatiou, Macdonald, Guttridge & Hammerschlag, 2015).

South Africa's varied marine environment and the diversity of shark populations found in the oceans bordering the country, create unparalleled opportunities for shark-diving tourism along the country's coastline (Hara et al, 2003 as cited in Dicken & Hosking, 2009). But, there are only a few shark-diving operators in South Africa, as the industry is still in its introductory phase with the majority of activities focused on the whale shark, ragged tooth shark (Carchariasn Taurus), the Zambezi shark (Carcharhinusleucas) in Kwazulu-Natal and the white shark (Carcharodoncarcharias) along the Western Cape Coast (Hara et al, 2003 as cited in Dicken & Hosking, 2009). Shark cage diving is one of the most popular forms of shark-diving in South Africa especially among foreign visitors (Oceans Aware, 2014). The existing shark-cage diving operators focus mainly on the great white shark. As a result, South Africa has the largest white shark-cage diving industry among the destinations that offer this activity, in terms of number of operators and the number of sites where the industry is allowed to operate from (Bruce, 2015).

Similar to the rest of the world, relatively few studies have been conducted on the economic value of marine tourism in South Africa. However, in 2003 it was estimated that white shark-cage diving in Gansbaai in the Western Cape generated approximately R30 million annually (Hara et al, 2003 as cited in Dicken & Hosking, 2009:227).

Research conducted on the participants of shark-diving experiences elsewhere in the world found that participants were non-local (foreign visitors), well-educated, young males, with high discretionary income (Altobelli, 2011). Similarly, Dicken and Hosking (2009) identified that the majority of participants in tiger shark-diving in South Africa were males from Britain and Germany, and hold a tertiary education. It is important to determine a profile of shark-divers in South Africa as the sector is still in its introductory phase this means that demand for this experience requires stimulation. Having a profile will enable shark-diving businesses to develop marketing and branding strategies which will attract more customers.

Marine protected areas

Previously many marine areas enjoyed de facto protection due to their remote location. However, advances in technology and increasing over-exploitation of marine resources have led to an increase of the human footprint on oceans, resulting in a need for more formal protection measures (WWF, 2014).

In response to the need to protect the marine environment, countries worldwide have implemented Marine Protected Areas (MPAs) as a management strategy to address different threats to marine and coastal ecosystems. Furthermore, MPAs also provide ecosystem services such as coastal protection, waste assimilation and flood management (WWF, 2014).

In South Africa, MPAs consist of areas that are declared under Section 43 of the Marine Living Resources Act 18 of 1998 (MLRA). No formal definition of an MPA is offered in the MLRA 18 of 1998, hence it is proposed that the international definition of the term is applied in the South African context. 'A protected area is a clearly defined geographical space, recognised, dedicated and managed, through legal or other effective means, to achieve the long-term conservation of nature with associated ecosystem services and cultural values' (International Union for Conservation of Nature and Natural Resources, 2012:9). There are currently 24 MPAs located throughout South Africa (WWF, 2014).

Research into MPA's includes the work of Queiroz et al (2013) who developed a profile of the tourists visiting protected areas in the Azores. The findings of the study indicated that slightly more females than males visited protected areas. The largest proportion of respondents were between 26 and 35 years old. Petrosillo, Zurlini, Corliano, Zaccarelli and Dadamo (2007) examined tourists' perceptions of an Italian MPA. The demographic results of the study showed that more males visited MPAs, the majority of visitors were between 31-45 years old and the largest portion of respondents had a high school education. It is important to determine the profile characteristics of visitors to MPAs in South Africa as this knowledge can assist management of these areas to provide a better customer experience to their visitors.

Profiling marine tourists

A consumer profile assists in describing a consumer based on certain categories such as demographics, socio-economic status and product usage. This enables businesses to group consumers for marketing and advertising purposes (Devault, 2019). Profiling forms part of the first step of the target marketing process. This step is referred to as market segmentation and includes two stages. The first stage involves dividing the market into smaller more homogenous groups with distinct needs, characteristics and behaviours. This grouping is necessary for the marine tourism sector as it consists of several categories (boating and cruising, sports and recreation and the leisure category), each containing different activities. It is unlikely that marine tourism businesses can appeal to consumers in all the categories in the same way (mass marketing), given the vast differences between the nature of the categories. However, it is not clear whether consumers *within* a category, for example, the leisure category, are similar or different. Therefore, the second stage of market segmentation (known as profiling) has to be applied in order to determine whether differences exist among those engaged in shark-diving, whale-watching and visits to MPAs. During the profiling stage, profiles are developed based on the uncovered market segments. Having a profile of consumers makes it easier for businesses

to pursue a differentiated marketing strategy. This strategy is perceived to be more advantageous as it offers many benefits such as increased sales and profits, larger market share and economies of scale in manufacturing and marketing (Lamb, Hair, McDaniel, Boshoff, Terblanche, Elliot & Klopper, 2010). These benefits are derived by providing customers with a marketing offer that is appealing and meets their specific needs. Customer profiles can furthermore help marine tourism businesses with planning their product mixes, promotional campaigns, and marketing strategies (Pulido-Fernández & Sánchez-Rivero, 2010). This knowledge can also assist businesses to identify new market opportunities and assist with service quality evaluation, and image development (Slabbert & du Plessis, 2011). Finally, such knowledge might even stimulate the development of more effective management tools especially in ecologically sensitive areas such as MPAs (Queiroz et al., 2014).

Research Methodology

The research reported here formed part of a more extensive study into marine tourism in South Africa. The research design was descriptive and quantitative in nature. The target population comprised respondents aged 19 years and older, residing anywhere in the world, who had participated in at least one of three identified marine tourism activities (whale-watching, shark-diving and visits to MPAs) in South Africa. Since a comprehensive list of the target population was not available, non-probability sampling was used to identify possible respondents. An online panel company was recruited to invite the participation of potential respondents who met the predetermined requirements. A total of 11764 respondents were invited using this method, of which 83 provided usable responses. This online recruitment was followed by convenience and snowball sampling that yielded an additional 361 usable questionnaires, resulting in 444 questionnaires being subjected to statistical analysis. A questionnaire comprising closed-ended, dichotomous and multiple-choice questions served as the measuring instrument. Six questions examining the demographic characteristics of respondents followed a screening question that identified the relevant marine tourism activity.

Descriptive and inferential statistics were used to analyse the data. Descriptive statistics assisted in describing the basic features of the data (Web center for social research methods, 2006) and inferential statistics enabled conclusions to be drawn about the population's characteristics (Burns & Bush 2003). Furthermore, descriptive statistics were used to summarise the respondents' demographic profile and inferential statistics (specifically MANOVA) was used to support the descriptive statistics by examining whether significant differences exist between comparative samples. The results are discussed below.

Results

Six sets of results are presented. These relate to the respondents' participation in selected marine tourism activities, demographic characteristics of the total sample, a comparison of participants in the three activities based demographic characteristics (gender, age, level of education and nationality).

Participation in selected marine tourism activities - Nearly half of the respondents (46.6%) visited marine protected areas (MPAs), 27.9% participated in a whale-watching experience and slightly less (25.5% of respondents) participated in a shark diving experience.

Demographic characteristics of the total sample - Table 1 provides a summary of the demographic characteristics of the total sample. Slightly more females (51.8%) than males (48.2%) responded to the questionnaire. The largest proportion of respondents (42%) were between the ages of 30 and 50, slightly fewer respondents (41%) were between the ages of 19 and 29 years. The majority of respondents (77%) had a tertiary qualification (a certificate, diploma, degree or post-graduate degree). Eighty percent of the respondents were South Africans, while 20% were foreign nationals, with 14.2% who spent their childhood in Europe and 13.2% who currently reside in Europe.

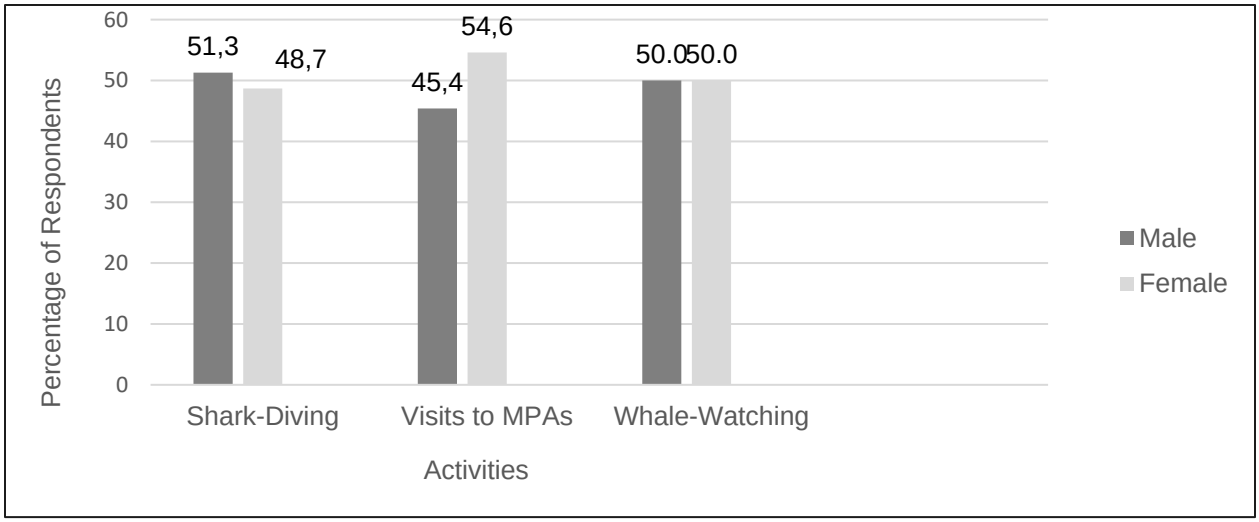
Table 1. Demographic characteristics of respondents (*n*=444)

VARIABLES	FREQUENCY	PERCENTAGE
GENDER		
Males	214	48.2
Females	230	51.8
Total	**444**	**100.0**
AGE		
19-29	183	41.0
30-50	187	42.0
>51	74	17.0
Total	**444**	**100.0**
EDUCATION		
Non-Tertiary	101	23.0
Tertiary	343	77.0
Total	**444**	**100.0**
NATIONALITY		
South African	**355**	80.0
Foreign National	89	20.0
Total	**444**	**100.0**
CONTINENT WHERE CHILDHOOD WAS SPENT		
Africa	360	81.1
Antarctica	1	0.2
Asia	1	0.2
Australia	2	0.5
Europe	63	14.2
North America	16	3.6
South America	1	0.2
Total	**444**	**100.0**
CONTINENT WHERE RESPONDENT RESIDES		
Africa	359	80.9
Antarctica	0	0
Asia	2	0.5
Australia	5	1.0
Europe	61	13.7
North America	15	3.4
South America	2	0.5
Total	**444**	**100.0**

Gender - Figure 1 reports the gender of the respondents who participated in each of the three marine tourism activities. Just over half of the respondents (51.3%) who participated in shark-diving were male and 48.7% were female. It is interesting that nearly an equal number of males and females are interested in this activity, where the assumption might be that it would be predominantly a male activity. Unlike shark-diving, the largest proportion (54.6%) of respondents

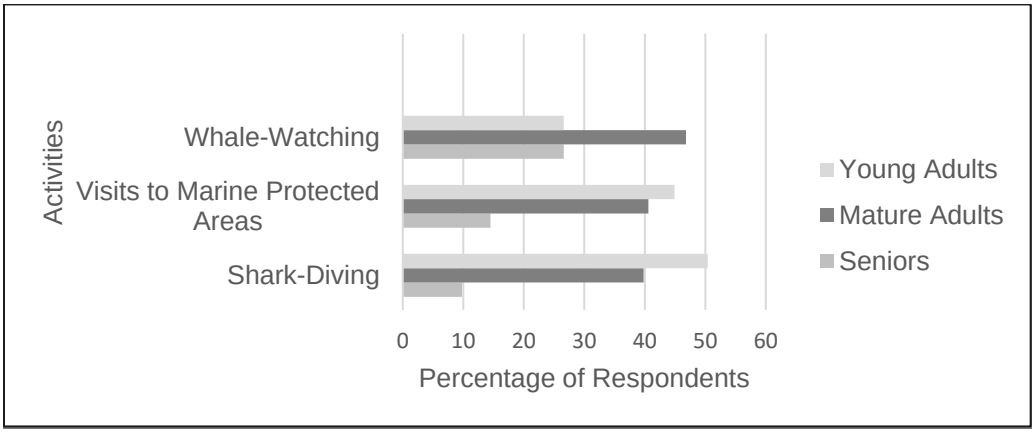
who visited marine protected areas were females. It is interesting to note that those who participated in whale-watching, were evenly spread between the two genders.

Figure 1. Gender of Participants in the Three Activities (*n*=444)



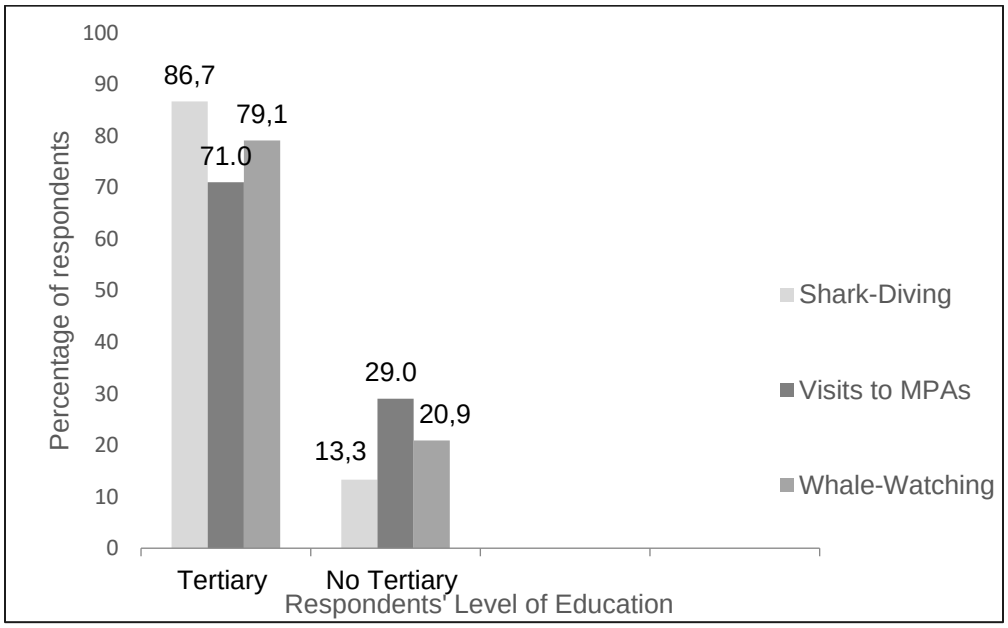
Age - Figure 2 shows that just more than half (50.4%) of the respondents who participated in shark-diving experiences were between the ages of 19 to 29, while 39.8% were between 30 and 50 years old. It is interesting to note that 44.9% of the respondents who visited MPAs, were young adults and the largest portion of respondents (46.8%) who participated in whale-watching fell into the mature adult group (30 to 50 years old).

Figure 2. – Age Composition of Participants in the three Activities (*n*=444)



Level of education - When comparing the education level of respondents across the three activities (Figure 3) it is noteworthy that more than 70% of the respondents for all the activities had some form of tertiary education. The highest proportion of respondents with a tertiary education was among the shark divers (86.7%).

Figure 3. - Comparison of Participation in activities based on Level of Education (*n*=444)



Nationality – Table 2 shows that more than half (55.8%) of the foreign nationals who responded to the questionnaire participated in shark-diving experiences. Unlike foreign nationals, the largest number (94.7%) of South African nationals participated in visits to MPAs.

Table 2. – Activity Participation Foreign Nationals vs South African Nationals

Shark-Diving	**%**
South African	44.2
Foreign National	55.8
Visits to MPAs	**%**
South African	94.7
Foreign National	5.3
Whale-Watching	**%**
South African	87.9
Foreign National	12.1

MANOVA was used to determine whether significant differences exist among participants of the three selected marine tourism activities, based on the respondents' demographic profile variables (gender, age, level of education and nationality). As shown in Table 3 significant differences exist between the profile variables (gender – p = .0005; age – p=.013; level of education – p=.027; nationality – p=.0005).

Table 3. MANOVA results for demographic characteristics

Effect	**F** *f*-statistic	**Degrees of Freedom**	**P**
Gender	3.99	9; 428	<.0005*
Age	1.90	18; 856	.013*
Level of Education	2.12	9; 428	.027*
Nationality	4.82	9; 428	<.0005*

*Statistically significant, p<0.05

Discussion

The objective of the current study was to develop and compare profiles of tourists who participate in selected marine tourism experiences in South Africa. The findings of this study showed that significant differences exist in terms of demographic profiles of individuals who participate in shark-diving, whale-watching and visits to MPAs in South Africa. Firstly, significant differences were identified in the gender of respondents who participate in the selected marine tourism activities. More males were attracted to shark-diving experiences which is consistent with the findings of Altobelli (2011). In the case of MPAs more female participation was observed, this supports the findings of Quieroz (2013) but is inconsistent with the findings of Petrosillo et al (2007) who found more male visitors to MPAs.

Whale-watching attracted an equal number of male and female participants this is different to the findings of Lück (2015) and Parsons et al (2003) who found that more females were attracted to whale-watching experiences. There are slight differences observed between male and female participation in the selected activities. Therefore, marine tourism operators are advised against segmenting their market based on gender, instead businesses should determine what makes the experience meaningful for the different genders and focus on those aspects of the offering which will enhance meaningfulness.

Secondly, the empirical findings also show significant differences with respect to age. For example shark-diving experiences and visits to MPAs attracted mainly young adults this supports the findings of Altobelli (2011) who found the majority of shark-divers to be young and Quieroz (2013) who found the largest proportion of MPA visitors to be between the ages 26-35 years. Whale-watching attracted mostly mature adults, this finding is consistent with the findings of Parsons et al (2003) who found participants of whale-watching tours to be predominantly middle aged.

However, the finding is different to that of Lück (2015) who found the majority of whale-watching tourists to be younger than 40 years old. This seems to suggest that age groups can be attracted to diverse experiences ranging from adventurous to more passive activities. A reason for this could be that tourists might have the same chronological age but differ in their biological age. As a result marine tourism operators have to ensure that they are staging experiences that are appealing to different age groups.

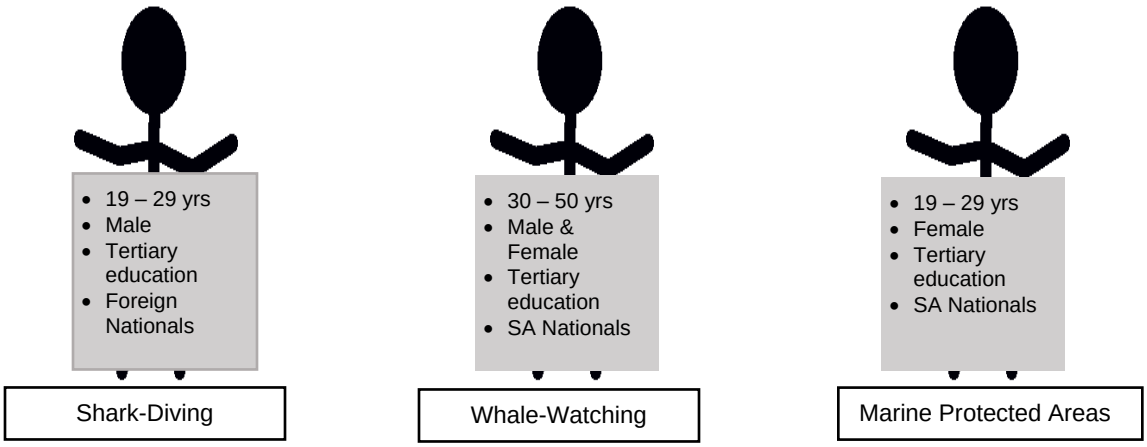
Thirdly, significant differences were also observed for level of education. Although the majority of participants for each of the three activities had a tertiary education, they did not all possess the same level of qualification. For example some individual's had a certificate or diploma while, others had a degree and some had a post-graduate degree. So, despite the fact that the majority of participants for all three activities had some form of tertiary qualification, operators should be aware that the level of qualification among participants can differ. As a result, experiences should be informative and interesting for individuals with different educational backgrounds. For example marine tourism businesses can provide specific information pertaining to the activity, but also provide information or interesting facts about the broader marine environment. Focus should be on providing more in-depth information, interesting and unknown facts. The business can make more effort to engage the tourist, ask questions and stimulate discussions.

Lastly, significant differences also exist in nationality, with the majority of South African nationals participating in whale-watching and visits to MPAs. The largest proportion of foreign nationals participated in shark-diving experiences.

This confirms prior research by Altobelli (2011) and Dicken and Hosking (2009) that has identified the majority of shark-diving participants to be foreign nationals. The attraction of foreign nationals to shark-diving experiences could be attributed to the fact that the experience is not staged in the countries in which they reside. In the context of South Africa, a reason for less South African participation specifically, could be due to cultural factors and the history of the country which denied black South Africans access to marine related activities. During Apartheid the role of black South Africans in the tourism industry was confined to that of service providers, specifically performing menial labour tasks. As a result post-apartheid the tourism industry has faced the challenge of encouraging and enabling black South Africans to become consumers of tourism activities (McKay, 2016). Marine tourism businesses should ensure that they are marketing their experiences to the correct audiences and that they are providing an experience which meets the expectations of the different nationalities.

As mentioned previously the profiles of the participants differ significantly and therefore three segments seem to exist. The profiles of the participants are illustrated in Figure 4 on the next page.

Figure 4 – Profiles of Participants in Selected Marine Tourism Experiences



Managerial Implications

The results of the study hold important implications for marine tourism operators. Firstly, when considering gender it appears as if males and females are interested in different activities. However, businesses are not advised to target only males or females as the results of the current study are not entirely consistent with previous research. This inconsistency indicates that participation in the different activities could be more equally distributed among male and female participants than what was found in the current study. Therefore it is recommended that businesses stage experiences that are suitable and equally appealing to both genders.

Secondly, with regards to age, marine tourism operators are advised to focus on young adults, as this age group appears to be interested in a diversity of experiences. This recommendation is based on the findings of this study but has been highlighted in earlier studies as well.

Thirdly, when considering the level of education, participants of marine tourism activities appear to be well educated, with the largest proportion having some type of tertiary qualification (undergraduate diploma/certificate or post-graduate qualification) therefore management should ensure that their guides are well trained and knowledgeable and that they pitch their message at the correct level for the audience and provide interesting facts and new knowledge to participants. For example in MPAs guides can share stories about animals found in the area, particularly animals that are tracked, sharing the history of the animals and how they came to the area.

Lastly, concerning nationality, since South African nationals appear to be more interested in whale-watching and visits to MPAs compared to foreign nationals who show more of an interest in shark-diving, it is recommended that operators identify expectations of different nationalities and stage an experience which meets these expectations. Although shark-diving appears to be more popular among foreign nationals, shark-diving operators are advised to devise strategies to attract more local tourists as this market is showing increased interest in the activity this is evident in the fact that a relatively high percentage of South Africans had participated in shark-diving activities in the current study.

Conclusion

The objective of this study was to establish profile characteristics and compare the characteristics for tourists who participated in three selected marine tourism activities in South Africa in order to identify differences or similarities between these groups. Differences exist as previously mentioned but, similarities can also be identified. For example shark-diving and MPAs both attract mainly young adults, and whale-watching and MPAs attract mostly South African nationals and all three activities attract participants with a high level of education. This implies that business should not only focus on what is different but also pay attention to what is the same and capitalise on this. For example the three profiles indicate that marine tourists are young to mature adults between the ages of 19 to 50 years old, with a high level of education. This information can be used by the marine tourism sector when developing their marketing mix. The sector should ensure that they design products or experiences that are appealing to the market, that the products or experiences are accessible to the market, that they have employed the correct pricing strategies and that the promotional strategy will attract the attention of the market.

References

Allen, G. & Brennan, F. (2004). *Tourism in the new South Africa: social responsibility and the tourist experience*, IB Tauris, London:

Altobelli, R. (2011). *The experience of shark diving in Pacific Harbor, Fiji: Who goes and how important is education and interpretation*? Unpublished doctoral thesis, Auckland University of Technology, Auckland, New Zealand.

Bentz, J., Lopes, F., Calado, H. & Dearden, P. (2016). Managing marine wildlife tourism activities: Analysis of motivations and specialisation levels of divers and whale watchers, *Tourism Management Perspectives* 18, 74–83.

Brand South Africa. (2018). *SA's key economic sectors*, viewed 19 April 2018, at https://www.brandsouthafrica.com/investments-immigration/business/investing/sas-key-economic-sectors.

Bruce, B. (2015). A *review of cage diving impacts on white shark behavior and recommendations for research and the industry's management in New Zealand*, Report to the industry's management in New Zealand, Hobart, Tasmania: CSIRO marine and atmospheric research.

Burns, A. & Bush, R. (2003). *Marketing research: Online research applications*. *4th ed*, New Jersey: Pearson Education.

Buultjens, J., Ratnayake, I., Gnanapapa, A. & Nedelea, A. (2018). Whale watching tourism in Sri Lanka: A visitor satsisfaction & behavioural characteristics, J*ournal of Tourism Studies & Research in Tourism*, 24, 22-33.

Cooper, C. (2012). *Essentials of tourism,* Pearson Education Limited, Essex.

Cooper, C. & Hall, C. (2013). *Contemporary tourism – an international approach*, *2nd ed*, Goodfellow Publishers, Oxford.

Damanaki, M. (2016). *Blue growth by design – An ocean of opportunity awaits, if we get it right*, viewed 19 April 2018, from https://global.nature.org./content/blue-growth-by-design-an-ocean-of-opportunity-awaits-if-we-get-it-right.

Department of Environmental Affairs and Tourism. (2005). *Boat-Based whale-watching in South Africa: an economic perspective*, viewed 10 April 2018, at https://www.environment.gov.za/.../part2_ marineand_coastal_resources.

Department of Environmental Affairs and Tourism. (2006). *South Africa environment outlook*, viewed 10 April 2018, at https://www.environment.gov.za/ sites/default/files/docs/part2_marineand_coastal_resources.pdf+&cd=2&hl=en&ct=clnk&gl=za.

Department of Tourism. (2017*). Development of a framework to assess the economic impact of coastal and marine tourism in South Africa*. (Final report), Cape Peninsula University of Technology, Cape Town.

Devault, G. (2019). *Consumer profile: Defining the ideal customer*, viewed 21 January 2019, at https://www.thebalancesmb.com/consumer-profile-defining-the-ideal-customer-2296932.

Dicken, M. & Hosking, S. (2009). Socio-economic aspects of the tiger shark diving industry within the Aliwal Shoal Marine Protected Area, South Africa, *American Journal of Marine Science* 31(2), 227–232.

Dicken, M. (2014). Socio-Economic aspects of the Sodwana Bay scuba diving industry, with a specific focus on sharks, *African Journal of Marine Science*, 36(1), 39-47.

Filby, N. Stockin, K. & Scarpaci, C. (2015). Social science as a vehicle to improve dolphin-swim tour operation compliance, *Marine Policy* 51, 40–47.

Findlay, K. (1997). Attitudes and expenditures of whale watchers in Hermanus, South Africa, *South African Journal of Wildlife Research* 27(2), 57–62.

Gallagher, A. & Hammerschlag, N. (2011). Global shark currency: the distribution, frequency, and economic value of shark ecotourism, *Current Issues in Tourism* 14(8), 787–812.

Gallagher, A. Vianna, G., Papastamatiou, Y., Macdonald, C., Guttridge, T. & Hammerschlag, N. (2015). Biological effects, conservation potential and research priorities of shark diving tourism, *Biological Conservation* 184, 365–379.

Geldenhuys, L. (2014). *The influence of Blue Flag status on tourist decision-making in South Africa*, Unpublished Honours Treatise, North West University, Potchefstroom, South Africa.

Ginty. C. (2010). *An examination of the marine tourism sector in the west of Ireland: capabilities, performance and contribution to the regional economy*, Unpublished PhD thesis. Galway-Mayo Institute of Technology, Galway, Ireland.

Hatchuel, M. (2016). *Boat-based whale watching permits: Securing a future*, viewed 10 April 2018, at http://www.thistourismweek.co.za/newsletters/boat-based-whale-watching-permits-south-africa/.

Hockey, P. & Branch, G. (1997). Criteria objectives and methodology for evaluating marine protected areas in South Africa, *South African Journal of Marine Science*, 18(1), 369-383.

Hoyt, E. & Parsons, C. (2013). The whale-watching industry: Historical development, *Research Gate*, January 2014, 57–70.

Hubbard, L. (2018). *Why is identifying the target market so important to a company?*, viewed 22 August 2018, at https://smallbusiness.chron.com/identifying-target-market-important-company-76792.html.

International Union for Conservation of Nature & Natural Resources (IUCN). (2012). *Guidelines for applying the IUCN protected area management categories to marine protected areas*, viewed 20 September 2018, at https://www.iucn.org/content/guidelines-applying-iucn-protected-area-management-categories-marine-protected-areas-0.

Jennings, G. (2007). *Water-Based Tourism, Sport, Leisure and Recreation Experiences,* Massachusetts: Butterworth-Heinemann.

Kotler, P. & Armstrong, G. (2014). *Principles of Marketing*, 2nd ed, Pearson, Cape Town.

Lamb, C., Hair, J., McDaniel, C., Boshoff, C., Terblanche, N., Elliott, R. & Klopper, H. (2010). *Marketing. 4th ed*, Oxford University Press, Cape Town.

Lötter, M., Geldenhuys, S. & Potgieter, M. (2012). Demographic profile of adventure tourists in Pretoria, *Global Journal of Business Research*, 6(4), 97-108.

Lück, M. (2015). Education on marine mammal tours – but what do tourists want to learn? *Ocean & Coastal Management,* 103, 25-33.

McKay, T. (2016). The geography of the South African adventure tourism industry, African Journal of Hospitality, Tourism and Leisure, 5(3), 1-21.

Mograbi, J. & Rogerson, C. (2007). Maximising the local pro-poor impacts of dive tourism: Sodwana Bay, South Africa, *Urban Forum*, 18(2), 85-104.

Myeza, J., Mason, R. & Peddemors, V. (2010). Socio-Economic implications of the Kwa-Zula Natal sardine run for local indigenous communities, *African Journal of Marine Science*, 2, 399–404.

Oceans Aware. (2014). *Shark cage diving: Explore the domain of the great white shark*, viewed 10 April 2018, at http://cdn2.hubspot.net/hub/288079/file-850303115-pdf/. Oceans_Aware/Oceans_Aware_Marine_Education_Ebook_Series/SHARK_CAGE_DIVING.pdf ?t=1439831721339.

O'Connor, S., Campbell, R., Cortez, H. & Knowles, T. (2009). Whale Watching Worldwide: tourism numbers, expenditures and expanding economic benefits, a special report from the *International Fund for Animal Welfare,* Yarmouth MA, USA, prepared by Economists at Large.

Parsons, E., Warburton, C., Woods-Ballard, A., Hughes, A., Johnston, P., Bates, H. & Lück, M. (2003). Whale-watching tourists in West Scotland, *Journal of Ecotourism* 2(2), 93–113.

Orams, M. (1999). *Marine tourism: Development, impacts and management*, London: Routledge.

Petrosillo, I., Zurlini, G., Corliano, M., Zaccarelli, N. & Dadamo, M. (2007). Tourist perception of recreational environment and management in a marine protected area, *Landscape and Urban Planning* 79, 29–37.

Pulido-Fernández, J. & Sánchez-Rivero, M. (2010). Attitudes of cultural tourist: A latent segmentation approach, *Journal of Cultural Economics* 34, 111–129.

Queiroz, R., Guerreiro, J. & Ventura, M. (2014). Demand of the tourists visiting protected areas in small oceanic islands: The Azores case study, *Environment, Development and Sustainability*, 16(5),1119-1135.

Saayman, M. (2014). A missed opportunity? *Tourism Business Africa*, viewed 10 May 2018, at tbcsa.travel/old/magazine/2014/jan/tba-jan-2014.pdf.

Saayman, M., Slabbert, E. & van der Merwe, P. (2009). Travel motivation: A tale of two marine destinations in South Africa, S*outh African Journal for Research in Sport, Physical Education & Research*, 31(1), 81-94.

Slabbert, E. & du Plessis, L. (2011). The influence of demographic factors on travel behaviour of visitors to nature-based products in South Africa, *in Book of proceedings Vol II, International Conference on Tourism & Management studies*, Algarve, pp. 1118–1121.

Shakouri, B., Yazdi, S., Nategian, N. & Shikhrezaei, N. (2017). *Journal of Tourism and Hospitality*, 6(3),1-11.

South Africa. (n.d). *South Africa at a glance*, viewed 10 May 2018, at http://www.southafrica.net.

South African Government. (2019). Tourism, viewed 31 July 2019, at http://www.gov.za/about-sa/tourism.

South African Business Integrator. (2017). *High expectations for SA's tourism sector in 2017*, viewed 10 May 2018, at http://www.sabusinessintegrator.co.za/viewonline/506/tourism/high-expectations-for-sa-s-tourism-sector-in-2017.

Stuart, C. & Stuart, T. (1988). *Field guide to mammals of Southern Africa*, Struik Publisher, Cape Town.

Tourism Business Africa. (2014). *Unlimited potential*, viewed 10 May 2018, at tbcsa.travel/old/magazine/2014/jan/tba-jan-2014.*pdf.*

Tourism Development International. (2007). *A strategy and action plan for the development of marine tourism and leisure in Lough Foyle and Carlingford Lough areas*, viewed 10 May 2018, at ec.europa.eu/ourcoast/download.cfm?fileID=1471.

Vianna, G., Meeuwig, J., Pannell. D., Sykes. H. & Meekan, M. (2011). *The socio-economic value of the shark-diving industry in Fiji*, Australian Institute of Marine Science, University of Western Australia, Perth.

Web center for social research methods. (2006). *Descriptive statistics*, viewed 2 August 2019, at https://socialresearchmethods.net/kb/statdesc.php.

WhaleRoute.com. (2014). *South Africa*, viewed 21 April 2018, at http://www.whaleroute.com/ areas/southafrica/

World Tourism Organisation. (n.d). viewed 21 April 2018, at http://www2.unwto.org/ content/why-tourism.

World Tourism Organisation. (n.d.). viewed 15 August 2018, at http://step.unwto.org/content/tourism-and-poverty-alleviation-1.

World Travel and Tourism Council. (2016). *Travel and tourism economic impact 2016 South Africa*, viewed 21 April 2018, at www.tomsa.co.za/storage/files/WTTC_South Africa_2016.pdf.

World Travel and Tourism Council. (2018). *Travel and tourism economic impact 2018 World*, viewed 16 August 2018, at https://www.wttc.org/-/media/files/reports/economic-impact-research/regions-2018/world2018.pdf.

WWF. (2014). *State of management of South Africa's marine protected areas*, Cape Town: Worldwide Fund.

WWF. (2016). *Ocean facts and futures: Valuing South Africa's ocean economy*, viewed 21 April 2018, at http://www.wwf.org.za/our_research/publications/?23821/Oceans-facts-and-futures-Valuing-South-Africas-ocean-economy.

Ziegler, J. & Rollins, P. (2012). But are tourists satisfied? Importance-performance analysis of the whale shark tourism industry in Isla Holbox, Mexico. *Tourism Management* 33, 692–701.