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The South African Adventure Tourism Economy: An urban phenomenon

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Abstract. The international adventure tourism literature is remarkably silent on the geographical nature of the industry. This study seeks to provide a geographical analysis of the sector within the context of South Africa. The spatial analysis was undertaken by metropolitan area, secondary towns and small towns, using a dataset of adventure tourism enterprises. It was found that the sector is spatially concentrated and highly urbanised, despite the perception that adventure tourism requires 'wild' and outdoor spaces. With many adventure tourism enterprises located in South Africa's metropolitan areas, it is a hither too unknown sub-sector of the South African urban tourism market. Urban settlements with large populations and a strong general tourism sector form a significant support base for adventure tourism operators. Cape Town is the dominant adventure tourism destination, making it the adventure capital of South Africa. A few small settlements were found to be highly dependent upon the sector for survival.

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1. Introduction

Although a small sub-sector of niche tourism, adventure tourism as a sector is growing internationally, and attracting academic interest. Much of the academic work undertaken in the sector has focused on the consumers of the product, as well as charting the major issues the sector faces, such as risk and environmental impacts (Cheng et al., 2016). In this regard, there is a neglected area of study in terms of the international literature with respect to the geography of the sector. This is despite the crucial role knowledge of the spatial dimension of the sector has on both building an understanding of local impacts and supporting governments in terms of generating adventure tourism policy (Pyke et al., 2016). The paucity of international literature on this aspect of adventure tourism is mirrored in South African literature. That is, while there are a growing number of academic studies on adventure tourism in South Africa, which has served to open up an understanding of the sector, this study sought to build on the McKay (2016) one by deepening the analysis of the size and spatial distribution of the South African adventure tourism industry by exploring it by settlement type. In this way it contributes to the international literature on the supply of adventure tourism, with particular reference to the unexpected urban nature thereof, from a South African perspective. The paper is structured in the following manner: A brief overview of both adventure tourism and the broad geography of adventure tourism in South Africa are presented. Then the methodology is described and the findings follow. Thereafter follows a summary and conclusion.

2. Literature review

There is a strong underlying theme in the international adventure tourism literature that adventure is associated with and rooted in a rural based 'wild' economy, that is, it is built around natural features such as rivers, mountains and the coastal zone (Ewert, Hollenhorst, 1997; Buckley, 2006; 2010; Beedie, 2016). Consequently one of the early debates was whether or not adventure tourism was a distinct tourism sector or a special kind of ecotourism (Cloke, Perkins, 1998). But, as an adventure tourist is one who wishes to experience a physical challenge and seeks an active holiday it was eventually accepted whilst there are synergies between adventure tourism and nature/ecotourism, it is a separate niche tourism sector, attracting a distinct clientele (Buckley, 2000; Trunfio et al., 2006; Pomfret, 2011).

Perhaps due to the perception of adventure tourism as a rural activity associated with "the great outdoors", there is only a small body of work on urban adventure (Cloke, Perkins, 2002; Foley et al., 2003; Swarbrooke et al., 2003; Beedie, 2005; Marinho, Bruhns, 2005; Kidder, 2013). These studies examine the rise of urban adventure where people explore and interact with urban spaces such as walls, abandoned buildings, brownfield sites and storm water drains for example. Much of this represents a fringe recreational activity where unexplored, marginalised urban terrain forms the backdrop instead of 'wild' or 'natural places' such as mountains or rivers. According to Beedie (2005) there are three types of urban adventure: (1) Free running or 'parkour'; (2) Spelunking or urban caving and; (3) bungee jumping. Parkour is when people physically interact with pavements, benches, roofs in a way that such infrastructure becomes a type of 'adult jungle gym' (Kidder, 2013). Urban caving involves exploring urban underground features such as culverts, sewage systems, tunnels, vaults and ruins (North, 1990). Bungee jumping is when people jump off bridges, platforms and towers using ropes and specially designed harnesses to experience a few seconds/minutes of freefall (Buckley, 2006; Hackett, 2006). Somewhat different to these sectoral studies is that of Schöllmann et al. (2000) who explored the way in which Christchurch, New Zealand promoted itself as a soft adventure destination. Thus, cities as bases for the adventure tourism industry, is not a theme that has been well explored in the international literature.

In terms of the South African tourist economy, the imprint of apartheid is still visible as it is racially polarised, with Black, Coloured and Indian people significantly underrepresented as consumers, managers, owners and shareholders in the industry (Rogerson, Visser, 2004; Rogerson, 2011; Butler, Richardson, 2015; Visser, 2016). This is true too for the adventure tourism sub-sector, where there is still a heavy reliance on white domestic tourists and day-trippers (Rogerson, 2007; McKay, 2013, 2016). Although post 1994 has seen a substantial rise in international tourists who purchase adventure tourism products (Fournier et al., 1998; Giddy, Webb, 2016; McKay, 2016; Visser, 2016).

The legacy of apartheid can also been seen in that the provision of tourist products is still heavily confined to what was once designated as 'white space' with minor exceptions within the so-called 'homelands' (Visser, 2003; Butler, Richardson, 2015; Hoogendoorn, Rogerson, 2015). This spatial apartheid holds true for the adventure tourism sector as well (McKay, 2016). In addition, as Earle (2008) and Rogerson (2014, 2015) have noted, a defining feature of the South African tourist economy is its spatial unevenness, dominated by the Western Cape, Kwa-Zulu Natal and Gauteng. This is for a number of reasons. One of which is an ongoing focus on marketing South Africa's well known tourist destinations whilst lessor regions are neglected (Earle, 2008). Another is the continued marginalisation of former Bantustan areas, and the stagnation of tourism in the secondary cities (Rogerson, 2016).

There is also a strong urban bias in the South African tourism economy as the major urban areas offer access to a large market, good infrastructure and services (Earle, 2008). Thus, the eight metropolitan cities grab the lion's share of tourism - a phenomenon which has increased over time (Rogerson, 2014; Rogerson, Rogerson, 2014). Between 2001 and 2012, total tourism trips to these eight metros, have increased by 50%; total bed nights by 39% and total tourism spend by 163%. Much of this can be attributed to an increased share of the international tourist market and business trips, as all metros reported a decline in their share of the lucrative leisure sector from 27.1% in 2001 to 24.4% in 2012 (Rogerson, 2014; Rogerson, Rogerson, 2014). The tourism fortunes of these eight metros are not equal, however. Between 2001 and 2012, Cape Town increased the number of tourism trips by only 8%, making it the worst performing city by trip number, followed by Mangaung (up 9%); Buffalo City (up 23%) and Nelson Mandela Bay (up 30%). The best performing city on this front was eThekwini/Durban, with an 83% increase in number of tourist trips. Other cities performing well are Johannesburg (up 68%); Tshwane (up 63%) and Ekurhuleni (up 61%).

The picture is different in terms of tourism spend however. In this regard, the best performing city is eThekwini/Durban (up 216%) followed by Ekurhuleni (up 210%); Johannesburg (up 193%) and Nelson Mandela Bay (up 174%). Moderate performances were posted by Tshwane (up 154%); Buffalo City (up 122%) and Cape Town (up 115%). Mangaung is the worst performer with only a 63% increase over the 2001-2012 period. Despite this, by 2012 the best over tourism performer is Johannesburg (whose share of the national tourism spend is 24.9%), followed by Cape Town (at 20.7%); Tshwane (at 17.3%) and eThekwini/Durban (at 16%). These four metros, then, are South Africa's top tourist destinations (Rogerson, Rogerson, 2014; Rogerson, 2015). The role played in the tourism market by the metros is, therefore, fairly well documented (Rogerson, Rogerson, 2014; Visser, 2016).

In terms of small towns, much scholarly work has also been done on the role that tourism plays in their economy. As urban areas have a mandate to promote local economic development, a number of small towns have turned to promoting tourism (Hoogendoorn, Nel, 2012; Rogerson, 2016). This includes retirement towns such as Gansbaai, second home towns such as Clarens and niche tourism towns such as Dullstroom (Toerien, Marais, 2012; Visser, 2016). Consequently it can be said that a number of small towns have successfully grown their economy using tourism. Despite this the most significant factor in economic growth for small towns is population size with a strong positive relationship between population size and number of enterprises (Toerien, Marais, 2012). Nevertheless, local agency, that is, key local actors (entrepreneurs in particular) and proximity to source markets (bigger cities) also play an important role in small town economic development (Hoogendoorn, Nel, 2012; Reynolds, Antrobus, 2012).

Unfortunately, within the context of urban tourism, the role of secondary cities has been largely overlooked (Rogerson, 2016). This is problematic for a number of reasons, but especially concerning is that the share of the national tourism economy for these secondary cities (other than Stellenbosch; George; Paarl; Upington; Nelspruit and Krugersdorp) has seen no growth between the years 2001--2012, worse there has been a notable decline in the number of domestic tourists to these areas, especially in terms of leisure tourists (Rogerson, 2016). This study, then, by exploring adventure tourism across all eight metros, secondary cities and small towns seeks to address this gap.

3. Research materials and methods

The study made use of the national South African adventure tourism operator database reported on by McKay (2016). That database recorded 827 operators in South Africa in 2011/2012. It should be noted that the number of operators may be under recorded as many seasonal or micro enterprises have an extremely low profile and so may not be reported in the dataset. Secondary data was also obtained from the StatsSA Census of 2011, as well as the Nel (2011) and South African Cities Network (SACN) study of 2012. The definition of metropolitan areas for South Africa was based on the Nel (2011) study and the South African Cities Network (SACN) (2012) study, although it is recognised that definitions of metropolitan areas and secondary cities is contested (SACN, 2012; Rogerson, 2016). Both studies divide South Africa into three urban settlement types: (1) metropolitan areas and large cities; (2) secondary cities and large towns; and (3) small towns and rural areas. According to SACN (2012) both Johannesburg and Cape Town are global mega cities based on their population size; whereas Johannesburg, Cape Town and eThekwini/Durban are in the Top 100 list of world cities based on function. Thus, Johannesburg, Cape Town and eThekwini/Durban are South Africa's primate cities. The eight metropolitan areas account for over 60% of South Africa's urban population (Nel, 2011).

As Rogerson (2016) noted, the lack of an official list and definition of secondary cities hampers an analysis of these crucial urban spaces. For example, the Nel (2011) study categorises Pietermaritzburg/Msunduzi as a metropolitan area whereas SACN (2012) lists it as a secondary city. In addition there are nine secondary cities on the Nel (2011) list that are not on the SACN (2012) list and five on the SACN (2012) list not on the Nel (2011) list. The SACN (2012) report designates the following places as secondary cities: Matjhabeng/Welkom; Emfuleni/Vereeniging; Mogale City/Krugersdorp; Msunduzi/Pietermaritzburg; Newcastle; Umhlathuze/Richards Bay; Lephalale/Ellisras; Polokwane/Pietersburg; Emalahleni/Witbank; Govan Mbeki/Secunda; Mbombela/Nelspruit; Steve Tshwete/Middelburg; City of Matlosana/Klerksdorp; Madibeng/Brits; Mafikeng/Mafikeng; Rustenburg; Tlokwe/Potchefstroom; //Khara Hais/Upington; Sol Plaatje/Kimberley; Drakenstein/Paarl; George; Stellenbosch. StatsSA considers Vereeniging and Vanderbijlpark to be part of Emfuleni.

The main reason for the difference between the Nel (2011) list and the SACN (2012) list is a change in population size between 1990 and 2010, with some settlements growing whilst the five cities on the Nel (2011) list recorded an absolute decline in population numbers. Thus, Virginia; Empangeni and Kroonstad have all declined in population size since 1990 and King William's Town is now part of the Buffalo City Metro. Thus, these four have been left out of this analysis. With respect to the secondary cites, data was obtained from StatsSA Census 2011 but it should be noted that in some cases StatsSA groups population and other data by the larger urban administrative entity, such as Sol Plaatje instead of Kimberley, Mbombela instead of Nelspruit. Thus, some of the findings may be somewhat distorted due to the way secondary cities are named and their data recorded by StatsSA. In terms of small towns the definition of centres having a population under 100 000 was used (Reynolds, Antrobus, 2012). In terms of smaller settlements, Umkomaas has been included as separate from eThekwini/Durban for two reasons: (1) Umkomaas is a significant adventure tourism settlement in its own right with 14 operators and (2) The merging of Umkomaas with eThekwini/Durban was a political and administrative decision, despite the two locations being 50km apart.

4. Research results

4.1. Results for the metropolitan areas

The key results from the national audit of adventure tourism enterprises reveal that almost two thirds (66%) the adventure tourism industry is located in urban areas. That is, 38.2% in the eight metropolitan areas; 9.1% in 21 secondary cities and 18.7% in 11 small towns. Thus, to a large degree adventure tourism in South Africa is an urban phenomenon. That said, it must be noted that in km^2 South African metropolitan areas are extremely large, thus, while it may seem that these operators are clustered together in one metropolitan area, the area itself is large and so the operators could be many kilometres apart from other another. Explanations for the uneven spatial development of adventure tourism in South Africa are explored in this section in relation to several factors.

An analysis of the industry by metropolitan areas (Table 1) reveals the importance of population size. Overall, these metropolitan areas are home to 19.414 million people and 324 (39%) of all the adventure tourism operators. The bigger the population of a metropolitan area, the more adventure tourism operators it can support with $r = 0.776$ [$p = 0.007$ on the Spearman two-tailed t test]. In terms of population size, Johannesburg and eThekwini/Durban are doing well. It seems that Port Elizabeth/Nelson Mandela; East London/Buffalo City; and Bloemfontein/Mangaung do not have the population required to support adventure tourism, which means for the sector to grow in these areas, it will have to be promoted to tourists rather than local residents. Pretoria/Tshwane is doing better than Ekurhuleni, but both have potential to support more adventure tourism operators. To further unpack this, the ratio of enterprises to population was determined. It was found that the average ratio is one operator for every 83 541 metropolitan residents (Fig. 1). Cape Town, is an outlier, with a ratio of 1:30 965, and so is outperforming its population size, an indication that Cape Town is not relying on local residents to support adventure tourism. In addition, based on ratios, eThekwini/Durban, Port Elizabeth/Nelson Mandela and Bloemfontein/Mangaung are doing well. East London/Buffalo City is the worst performer, both in terms of population size and ratio, an indication that either tourism is highly underdeveloped in this city or GDP (Gross Domestic Product) per capita is also a factor. This is also possible for Ekurhuleni, a metro which is also underperforming.

Table 1. Analysis by metropolitan areas

Metropolitan areas	Population size (2010) millions	GDP per capita (2010)	Size km^2	Number of operators	Percentage of total operators	Ratio of population to operators
Cape Town[1]	3.740	R76 932	2.455	113	13.66%	1:33 098
Johannesburg[2]	4.434	R108 094	1.644	61	7.48%	1:72 702
eThekwini/Durban[3]	3.442	R77 893	2.297	58	7.01%	1:59 351
Pretoria/Tshwane[4]	2.921	R98 688	2.174	30	3.63%	1:97 383
Ekurhuleni[5]	3.178	R53 819	1.924	26	3.14%	1:122 249
Port Elizabeth/Nelson Mandela	1.152	R72 861	1.958	14	1.69%	1:82 294
Bloemfontein/Mangaung	.747	R51 648	6.238	9	1.08%	1:83 048
East London/Buffalo City	.755	R59 673	2.460	5	0.6%	1:151 040

Explanation: [1]This figure includes all the smaller settlements which make up the metropolitan area of Greater Cape Town, such as Somerset West and Simon's Town; [2] This includes operators in Roodepoort, Midrand, Soweto; [3]Includes Umkomaas; [4] Includes operators found in Centurion, Wonderboom, Hammanskraal, Dinokeng; [5] This includes operators found in Alberton, Benoni, Boksburg, Edenvale, Germiston and Springs

Sources: Nel, 2011, SACN (2012), StatsSA (Census 2011), adventure tourism database (McKay, 2016)

As Ekurhuleni seems to indicate, one of the reasons for the difference in levels of support for adventure tourism could be GDP per capita, as the size of the adventure tourism sector is in line with its GDP per capita. However, when this analysis was done, overall for the metropolitan areas, it was found, in general, GDP per capita matters far less than population size, as $r = 0.1954$, a weak and statistically insignificant relationship (Fig. 2).

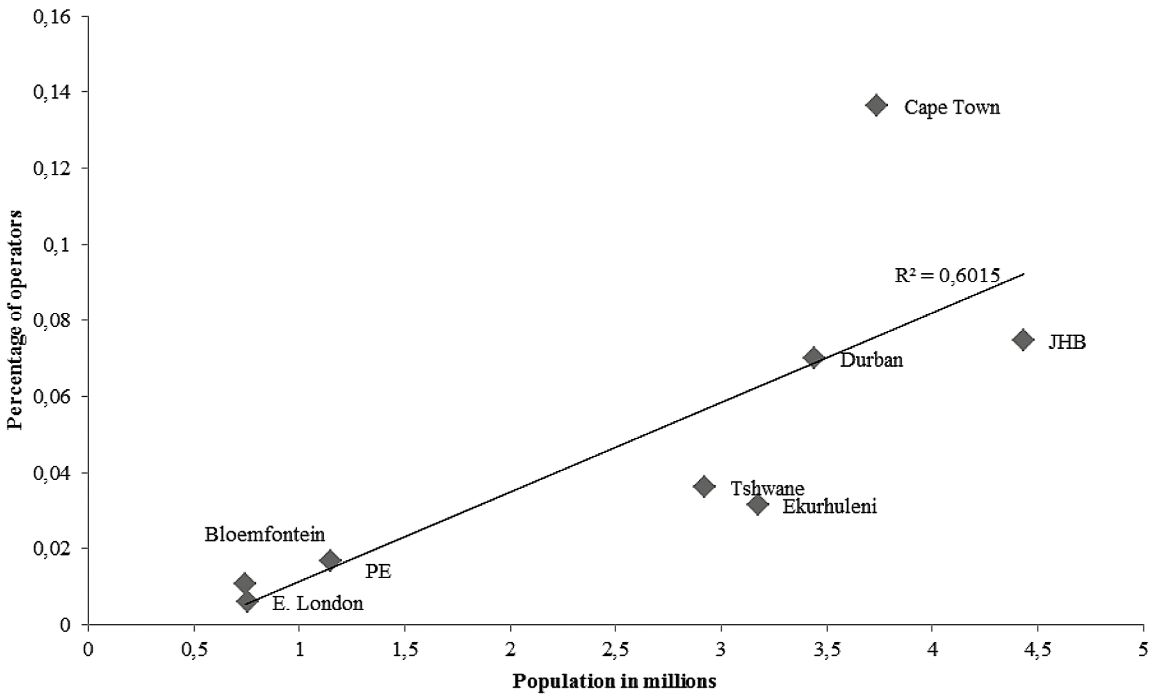

Fig. 1. Metropolitan population size compared to number of operators (as a percentage)

Source: Own survey

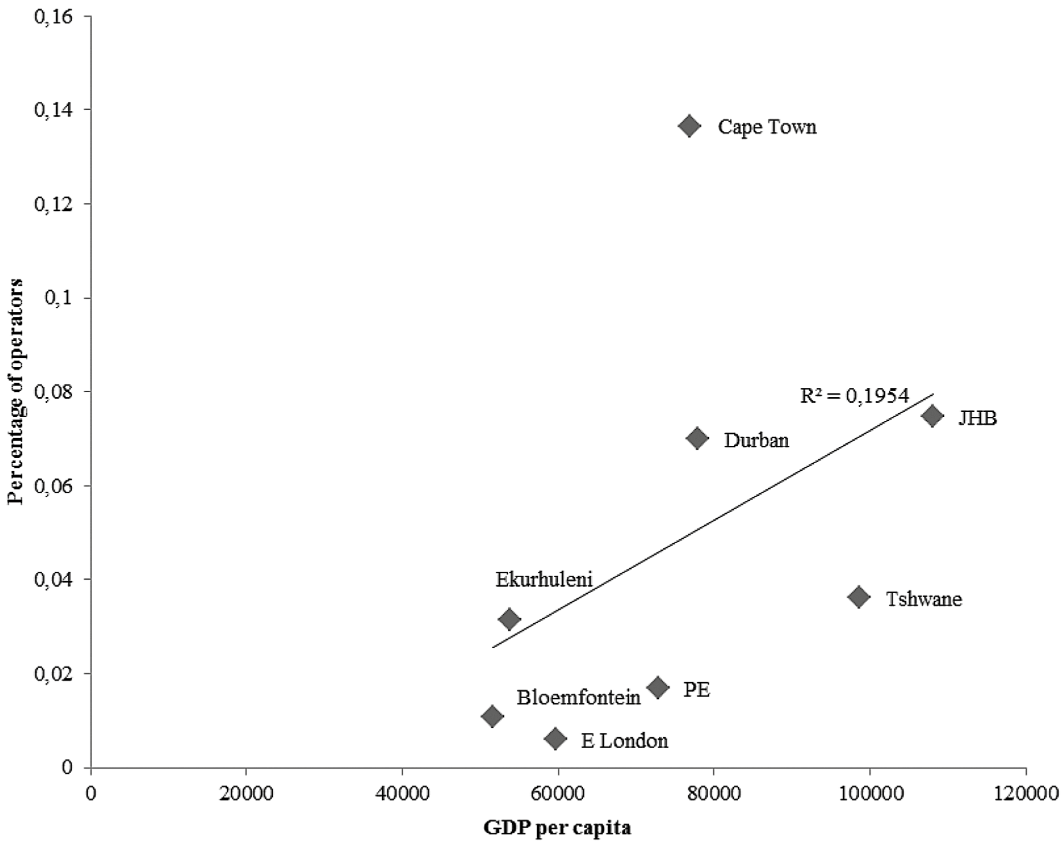

Fig. 2. Metropolitan GDP compared to number of operators (as a percentage)

Source: Own survey

While Johannesburg and eThekwini/Durban are similar in terms of ratio of operators to population, when looking at distribution by income, it is clear that eThekwini/Durban is faring far better than Johannesburg. This could be an indication that adventure tourism is a tourism-characteristic product for eThekwini/Durban. East London/Buffalo City; Port Elizabeth/Nelson Mandela; Bloemfontein/Mangaung and Tshwane are all underperforming based on their per capita GDP. Thus, for East London/Buffalo City, it is more likely that the tourism sector of this city is weak.

The weak correlation between GDP per capita and adventure tourism may be due to the incorporation of geographically large and poor peri-urban and rural areas into metropolitan areas for political and administrative reasons. Thus, the GDP per capita data may be distorted, making it difficult to discern the relationship between income and adventure tourism. Thus, the study went on to examine metropolitan areas by education level as a proxy for likelihood of being employed and having disposable income (Table 2) (Bhorat, Oosthuizen, 2009). In this instance, it is clear that there is a weak positive correlation between people with either a matric (completed secondary school) [r = 0.361] and have post matric qualifications [r = 0.368] and number of adventure tourism operators.

Table 2. Further analysis by metropolitan areas

Metropolitan areas	Number of operators	Pop with tertiary ed %	Pop with matric %	White pop %	Black pop %	Coloured %	Indian %
Cape Town	113	16.6	29.8	15.7	38.6	42.4	1.4
Johannesburg	61	19.2	34.7	12.3	76.4	5.6	4.9
eThekwini/Durban	58	12.3	37.1	6.6	73.8	2.5	16.7
Pretoria/Tshwane	30	23.4	34	20.1	75.4	2	1.8
Ekurhuleni	26	14.6	35.4	15.8	78.7	2.7	2.1
Port Elizabeth/Nelson Mandela	14	12	30.5	14.4	60.1	23.6	1.1
Bloemfontein/Mangaung	9	14.1	30.1	11	83.3	5	0.4
East London/Buffalo City	5	13.8	29.8	15.7	38.6	42.4	1.4

Sources: StatsSA, Census 2011, adventure tourism database (McKay, 2016)

When assessed by race, there is almost no relationship between the Indian population and adventure tourism [r = 0.148]. There was a surprisingly strong correlation between the size of the Coloured population and the number of operators [r = 0.637]. However, this may be reflecting the collinear relationship between Cape Town being both the adventure capital of South Africa and home to the largest Coloured population. Importantly, r = -0.771 [p=0.015 on Spearman's 2 tailed test] for the black population, demonstrating that overall the industry is not marketing itself to black South Africans. There was only a weak correlation with size of the white population and number of operators [r = 0.266]. But, because many of metropolitan residents who have post matric qualifications are white (the correlation between the white race group and post matric qualifications for these areas was r = 0.749 and statistically significant [p = 0.020 on Spearman's 2 tailed test]), it may be that education levels are a more important indicator of tendency to purchase an adventure tourism activity than race.

Cape Town is the adventure capital of South Africa, followed by Greater Johannesburg, then eThekwini/Durban and Tshwane/Pretoria. These metropolitan areas with significant populations, relatively high household incomes and an ability to attract tourists clearly have an advantage in this industry, home to 32% of the industry. Overall the dominance of Cape Town, Johannesburg and eThekwini/Durban confirms the results of Ferreira (2011) and Rogerson and Visser (2011) who also concluded that these three metropolitan areas are major geographical tourism poles. Rogerson (2015) includes Pretoria in this grouping, which also supports the finding here of Pretoria/Tshwane as the 4th most important adventure tourism location. Rogerson (2014) identifies the existence of business tourism (especially hosting international and local conferences) and leisure tourism market in these four cities. Sports events; casinos; waterfront developments; shoppertainment complexes; cultural and heritage products; backpacker tourism; gay tourism and slum tourism, all contributing to the tourism products on offer. This finding contributes to the literature by identifying adventure tourism as an important niche tourism market for these metropolitan areas.

4.2. Results for secondary cities

Overall, a total of 75 operators or 9.1% of the South African adventure tourism industry are located in South Africa's secondary cities (Table 3). Note that Msunduzi/Pietermaritzburg is included in this analysis. As for the metropolitan areas, there was also a strong and statistically significant relationship between population size and the adventure tourism industry in these secondary cities [r = 0.578, p = 0.002 on Spearman's 2 tailed test]. Thus, a critical mass of population is likely to be a necessary prerequisite for an adventure tourism sector to flourish. As for the metropolitan areas, the relationship between adventure tourism and income was explored. Due to the lack of GDP per capita data for these secondary cities, analysis was undertaken by the percentage of the population that had either completed high school or completed a tertiary qualification, as a proxy for income (Bhorat, Oosthuizen, 2009). In that respect it was found there was no relationship between number of operators and percentage of the population who had completed matric [r = 0.0145] or with the number of people who had a tertiary qualification [r = 0.0225]. This was contrary to what was found for the metropolitan areas. Thus, it became important to explore the relationship between adventure tourism and the tourist economy for these settlements. In order to do this, the secondary cities were categorised as either tourist towns (Nelspruit/Mbombela; Stellenbosch; Drakenstein/Paarl; George; Grahamstown and Worcester) or non tourist towns. In this regard, it was found the relationship to be strong [r = 0.408] and statistically significant [p = 0.020 on Spearman's 2 tailed test]. Thus, for secondary cities in South Africa, adventure tourism is a tourism-characteristic product as "at least 25% of the product is purchased by visitors" but does best in cities that have sufficient people to provide a reliable supply of labour and enable enterprises to operate efficiently and effectively by providing services such as shop front space, the internet and cellphone coverage for example (StatsSA, 2014).

Table 3. Analysis by secondary cities

Secondary towns	Population (2011)	Province	No of operators	Percentage of total operators
Nelspruit/Mbombela	588 794	Mpumalanga	11	1.3%
Msunduzi/Pietermaritzburg	618 536	KZN	8	0.97%
Stellenbosch	155 733	W Cape	7	0.84%
Madibeng/Brits	477 381	North West	6	0.73%
Emfuleni/Vereeniging/ Vanderbijlpark	721 663	Gauteng	5	0.6%
Mogale City/Krugersdorp	362 422	Gauteng	4	0.48%
City of Matlosana/Klerksdorp	398 676	North West	4	0.48%
Tlokwe/Potchefstroom	162 762	North West	4	0.48%
Drakenstein/Paarl	251 262	W Cape	4	0.48%
George	193 672	W Cape	4	0.48%
Sol Plaatje/Kimberley	248 041	N Cape	3	0.36%
Grahamstown	50 217	E Cape	3	0.36%
Khara Hais/Upington	93 494	N Cape	3	0.36%
Newcastle	363 236	KZN	2	0.24%

Umhlathuze/Richards Bay	334 459	KZN	2	0.24%
Witbank/Emalahleni	108 673	Mpumalanga	1	0.12%
Steve Tshwete/Middelburg	217 073	Mpumalanga	1	0.12%
Pietersburg/Polokwane	130 028	Limpopo	1	0.12%
Rustenburg	104 612	North West	1	0.12%
Worcester	78 906	W Cape	1	0.12%
Matjhabeng/Welkom	406 461	Free State	0	0
Mmabatho/Mafikeng	291 527	North West	0	0
Ladysmith	64 855	KZN	0	0
Govan Mbeki/Secunda	294 538	Free State	0	0
Mthatha/Umtata	96 114	E Cape	0	0
Lephalale/Ellisras	115 767	Limpopo	0	0

Source: Nel, 2011; StatsSA, Census 2011; SACN, 2012

A case in point may be the outlier, Nelspruit/Mbombela. Firstly, it is the capital of the Mpumalanga province and this attracts in people. Secondly it has a well-established tourism industry as it is also a gateway to many of the tourist attractions of the region, such as the Kruger National Park, and other game lodges, as well as Pilgrim's Rest, Hazyview, White River and Graskop (Rogerson, 2014). It is surrounded by many tourist attractions (Gods Window, Bourke's Luck Potholes) and has a well-developed accommodation sector. It is also on the main route to Swaziland and Mozambique, and, thus, generates a great deal of business tourism. Thirdly, it also has an international airport enabling international tourists to fly in. So, the town has sufficient critical mass and many features that will generate a tourism industry. This is then enables the adventure tourism sub-sector to flourish.

Within the context of secondary cities, both Stellenbosch and Msunduzi/Pietermaritzburg are performing well. For Msunduzi/Pietermaritzburg, this is likely to be a factor of both population size and being located in KwaZulu-Natal, a province that is performing well with respect to tourism in general and adventure tourism in particular. For Stellenbosch, this city may be reaping the benefits of its location with the Western Cape, which has a strong adventure tourism sector, as well as its proximity to Cape Town, whilst being a tourist centre in its own right.

There are secondary cities that are underperforming for population size, namely Emfuleni/Vereeniging/Vanderbijlpark; Newcastle; Umhlathuze/Richards Bay; Witbank/Emalahleni; Steve Tshwete/Middelburg; Pietersburg/Polokwane; Rustenburg; Matjhabeng/Welkom; Mmabatho/Mafikeng; Ladysmith; Govan Mbeki/Secunda; Mthatha/Umtata and Lephalale/Ellisras. These cities are grappling with large scale in-migration of generally very poor people and these cities do not have a tourism sector to speak of. So, it may be that having an existing tourism base is crucial, but there are some unexpected results in the analysis of secondary cities that may not support such a conclusion. That is, there are some cities that are not know as tourist localities but are home to some adventure tourism enterprises. Potchefstroom is for example has SCUBA diving, an operator offering horse riding and another one offering a huge variety including abseiling and river rafting and the like. Klerksdorp has two SCUBA operators, an operator offering scenic flights and another one offering hiking. Middleburg has a SCUBA diving operation, Vanderbijlpark has clay pigeon shooting and Rustenburg, sky diving. Newcastle has a SCUBA operator and another Horse riding/quad biking operator. Vereeniging has two SCUBA operators, another operator offering abseiling and caving, and a third offering a variety including river rafting.

Thus, it is possible that individual adventure entrepreneurs, who have the money and the skills, reside in these towns and open up adventure enterprises based on their personal interests, serious leisure activities or hobbies. They recognise opportunities to utilise the area's physical resources to launch an adventure tourism business. It seems, then that the adventure tourism industry is also in part reliant on individual entrepreneurs making the role of individual agency important for adventure tourism. In this regard, it may be that some of South Africa's secondary cities lack such residents. Mafikeng, for example, located near two nature and two game reserves, should be able to leverage this resource base and build an adventure tourism sector. Mthatha could be an adventure centre if various adventure activities were promoted at the Umtata Dam; Hluleka Nature Reserve; Nduli Nature Reserve and the Luchaba Nature Reserve. It could be that both lack local resident adventurers who can kick-start the industry.

4.3. Results by small towns

The analysis will now turn to smaller settlements (Table 4). The exploration of those smaller settlements home to many adventure tourism operators reveals that most are tourist towns. It was found that some, such as Sodwana Bay; Tsitsikamma; St Lucia and Umkomaas, are highly dependent on adventure tourism for their survival. They have been able to leverage their location to significant natural resources such as the Storms River, Marine Protected Areas and National Parks to attract adventure tourists. Thus, adventure tourism is a tourism-characteristic product in these settlements. Should the industry close or suffer setbacks, the economies of these settlements will suffer severely. Consequently the adventure tourism industry of these settlements must be viewed as an asset to be protected.

Secondly, there are five settlements (Plettenberg Bay; Magaliesburg; Gansbaai; Parys and Hermanus) for which adventure plays an important economic role. For these locations adventure tourism is also a tourism-characteristic product. However, these towns are less reliant on the adventure tourism industry either because other aspects of their tourism economy are well developed or because they have another major industry that is generating economic growth and employment opportunities. Should the adventure industry in these towns decline, it is likely that employees could source alternative employment, and while the local economy will suffer a setback, it is not as vulnerable as the economies of Sodwana Bay; Tsitsikamma; St Lucia and Umkomaas.

Table 4. The adventure economy of South Africa's small settlements

Settlement	Description	No of operators	Population size	Ratio of operators to population
Highly dependent on the adventure tourism industry				
Sodwana Bay	Situated in the iSimangaliso Wetland Park and the Maputaland Marine Reserve.	22	93	1:4.23
Tsitsikamma	Located on the Garden Route, a major tourist attraction.	10	160	1:16
St Lucia	Gateway to the Greater St Lucia Wetlands Park, close to other national parks.	13	1 104	1:84.92
Umkomaas	The world famous Aliwal Shoal (a world renowned scuba diving site) is 5km out at sea.	14	2 716	1:194
Somewhat dependent on the adventure tourism industry				
Plettenberg Bay	Located on the Garden Route, a major tourist attraction.	17	6 475	1:380.88
Magaliesburg	Primarily a tourist town, located in a mountainous area.	12	6 363	1:530.25
Gansbaai	Located close to the Betty's Bay MPA, with unique fynbos.	16	11 598	1:724.88
Parys	Located on the Vaal River. Strong emphasis on tourism in general.	11	8 071	1:733.73
Hermanus	Primarily a tourist town, famous for land based whale watching.	13	10 457	1:804.38

Adventure tourism industry one segment of its tourism industry				
Margate	Located on the KZN South Coast.	13	26 785	1:2 060.38
Hartebeespoort	Primarily a tourist town, with a dam and mountains.	10	22 374	1:2 237.40
Mossel Bay	Located on the Garden Route, a major tourist attraction.	18	89 430	1:4 968.33

Source: StatsSA and own survey

Thirdly, there are three settlements (Margate; Hartebeespoort and Mossel Bay) whose tourism industry is very well developed and, thus, the adventure tourism sector is only one small segment of a much larger tourism economy, although adventure tourism is also a tourism-characteristic product for these locations. The loss of the adventure industry for these settlements will only have minor repercussions.

4.4. Results - South Africa's top adventuretourism destinations

South Africa has 17 localities that combined host 442 operators, representing half (53%) of South Africa's adventure tourism operators. This highlights how geographically concentrated the industry is. These 17 settlements each have 10 or more adventure tourism operators (Table 5, Fig. 3).The five top locations in the Western Cape represent 21.4% of the national industry or 68% of all the Western Cape based enterprises. Gauteng mirrors this trend with 103 enterprises (69%) in only three locations. Thus, within the provinces the industry is geographically concentrated. The Western Cape is dominant, with five of the 17 (29%) located there, followed by four in Kwa-Zulu Natal (24%) and three in Gauteng (18%). Thus, not only is the adventure tourism geographical uneven at a national level, but within the provinces operators are not evenly distributed, with some centres emerging as 'adventure capitals'. Thirdly, the role a coastline plays in supporting the adventure tourism industry is clear with 11 (65%) of the 17 localities located in coastal provinces. Of this 11, six (55%) recorded the majority of their adventure enterprises offering water based adventure activities, with an additional two having both water and air as dominant sectors. With 35% of the industry being on the coast, it is clear that 'sun-sea-sand' as a resource assists greatly to create an enabling environment for adventure tourism enterprises to flourish. Water alone plays a significant role in launching an adventure tourism sector, with three of the inland locations also dominated by water based activities. Air related activities play a lessor role and only two of the locations supported a full range of adventure activities (Tsitsikamma and Hartebeespoort).

Table 5. Locations with 10 or more operators (2011 - 2012)

City/town	Number of operators	Percentage of total operators	Province	Coastal/ /inland	Dominant activity
Cape Town	113	13.66%	Western Cape	Coastal	Water related activities
Greater Johannesburg[1]	61	7.38%	Gauteng	Inland	Water (SCUBA)
Durban/eThekwini[2] (includes Umkomaas[3])	58	7.01%	Kwa Zulu Natal	Coastal	Water and air related activities
Greater Pretoria/Tshwane[4]	30	3.63%	Gauteng	Inland	Water (SCUBA)
Sodwana Bay	22	2.66%	Kwa Zulu Natal	Coastal	Water (SCUBA)
Mossel Bay	18	2.18%	Western Cape	Coastal	Water and air related activities
Plettenberg Bay	17	2.06%	Western Cape	Coastal	Water related activities
Gansbaai	16	1.93%	Western Cape	Coastal	Shark cage diving (water)
Port Elizabeth/ /Nelson Mandela	14	1.69%	Eastern Cape	Coastal	Air related activities

St Lucia	13	1.57%	Kwa Zulu Natal	Coastal	Water (SCUBA)
Margate	13	1.57%	Kwa Zulu Natal	Coastal	Air related activities
Hermanus	13	1.57%	Western Cape	Coastal	Water related activities
Magaliesburg	12	1.45%	Gauteng	Inland	Air related activities
Nelspruit/Mbombela	11	1.33%	Mpumalanga	Inland	No dominant activity
Parys	11	1.33%	Free State	Inland	White water rafting
Tsitsikamma	10	1.21%	Eastern Cape	Coastal	No dominant activity
Hartebeespoort	10	1.21%	North West	Inland	No dominant activity

Explanation: [1] This includes the suburbs of Randburg, Sandton, Bryanston, Rivonia, Soweto, Sunninghill, Houghton, Kyasands, Lanseria, Linden, Morningside, Northcliff, Olivedale, Parkhurst, Cresta; [2] This includes Umdloti, Umhlanga, Durban, Durban North, Umkomaas, Hillcrest operators; [3] Umkomaas has 14 adventure tourism operators; [4] Includes operators found in Centurion, Wonderboom, Hammanskraal, Dinokeng

Source: Own survey

The industry is less concentrated in Kwa-Zulu Natal, with 54.94% or 106 of the 196 enterprises found in four locations. However this is somewhat distorted because Umkomaas is considered administratively to be part of eThekwini/Durban. Although on a small scale, the other provinces also demonstrate a degree of geographical concentration with 33.33% of the Free State adventure enterprises in just one location (Parys); and roughly a quarter of the enterprises found in the North West (25.64%, Hartebeespoort), Mpumalanga (22.92%, Nelspruit) and the Eastern Cape (21.12%, Tsitsikamma) found in just one area.

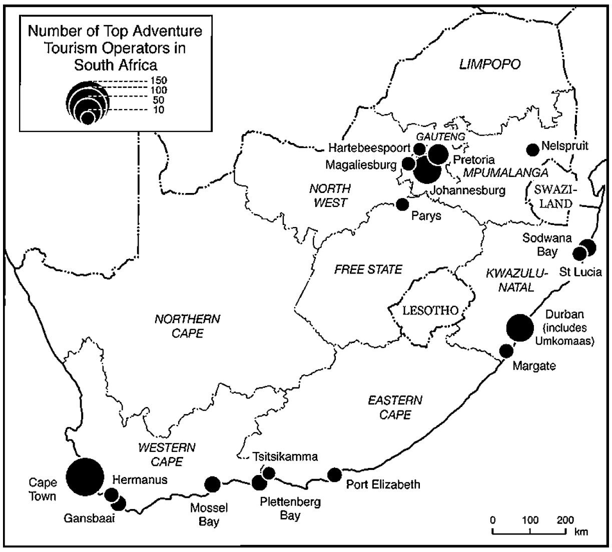

Fig. 3. Spatial distributions of the top 17 adventure tourism locations across South Africa (Umkomaas was included in Durban as it is administratively part of the Durban metropolitan area)

Source: Own survey

5. Conclusion

The adventure tourism industry of South Africa is unexpectedly heavily urban orientated, in contrast to how the industry is presented in the international literature on the sector. The sector is strongly associated with South Africa's primate cities, followed by the other metropolitan areas, as well as, some tourist towns, and, to a far lesser extent, smaller towns. This is likely due to the proximity of source markets (population size), making adventure tourism a tourism-related product supported by day trippers in many instances. It is also likely that it is easier for an adventure tourism operator to do business in larger urban centres as the potential labour force is bigger, and access to services is better and cheaper. However, the physical resources of the area do matter especially a coastline, as those settlements with such resources are far more likely to have an adventure tourism industry than those without. Having a general tourist base is also a significant driver of adventure tourism. For some metros such as eThekwini/Durban, Cape Town, some secondary towns such as Worcester and some small tourist towns, such as Gansbaai, adventure tourism is a tourism-characteristic product. Settlements wishing to promote adventure tourism sector should aim to promote tourism in general and foster individual adventure tourism entrepreneurs, because it seems that individual agency does matter.

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