A Snap Review of Adventure Tourism (AT) Operators in Cape Town

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Contents

Picture references on cover page: www - Cape Town Urban & Table Mountain Adventure: SUP, HIKE & CULTURE; Cape Commando - Day Adventure: J3; Sharkzone.co.za; www.south-african-hotels.com; www.capetownmagazine.com

1. Introduction

Adventure Tourism offers a tailored, individualised small scale tourist service to high-end tourists (Robinson & Novelli, 2005). The focus on high-spending tourists means that the potential profit-to-cost ratio and return on capital is significant (Sung, 2004; Petreas & Tzanakis, 2010). Therefore, this kind of Niche or Special Interest Tourism offers a means to avoid competing for tourists on price alone as profits are derived from personalising a specialized and well packaged product (Robinson & Novelli, 2005; Richards, 2010). Adventure tourism has the ability to attract both domestic and international tourists, in both the low winter and high summer seasons. It can also support pro-poor development, by generating well paid skilled jobs, stimulating the formation of small and medium sized enterprises (SMMEs) and generating backward linkages (Ndlovu & Rogerson, 2003; Rogerson, 2006, 2007a; Mograbi & Rogerson, 2007; Visser, 2016). Thus, if Greater Cape Town wishes to continue to foster economic growth through tourism, then the potential of adventure tourism must be maximized (Rogerson, 2007a; Swart, 2010; Rogerson & Visser, 2004).

Greater Cape Town, with its ocean, mountain, rivers and beaches as well as exciting cultural urban fabric is a location that lends itself to adventure tourism (Buckley, 2006). In order to further build the industry, and become an adventure tourism destination of choice, emphasis needs to be placed on growing the suite of adventure tourism activities on offer, market them properly and make sure that adventure tourism operators meet the requirements to act as ambassadors for the tourism industry. Although there is no national policy on adventure tourism in South Africa, the City of Cape Town (CoCT) does list adventure tourism as one of six key niche markets in its Tourism Development Framework of 2013-2017 (City of Cape Town, 2013). The CoCT Tourism Department needs to understand what the trends are in the adventure tourism industry in the city with a focus on the coast hence the purpose of the study is to do a snap review of adventure tour operators to get a better understanding.

2. Project specifications

The primary aim of the study was to determine the needs of the tourism adventure sector along the coast and investigate what impacts negatively on the sector.

Secondary aims of the study included:

- Define adventure tourism.
- Discuss the local and world trends in terms of adventure tourism.
- Determine the categories or types of adventure tourism relevant to Cape Town.
- Identify a list of adventure tourism companies for the survey.
- Develop a survey to determine the needs and problems of the adventure tourism sector along the coast (land and sea based) and survey 60 adventure tourism companies.
- Survey 5 tourism organisations.
- Compile a map of where the needs are of the different activities as well as the problems areas.

3. Adventure tourism in context

3.1 What is adventure tourism?

What constitutes adventure tourism is highly contested (Buckley, 2006; Mueller & Pell, 2016). Nevertheless most scholars agree that risk to life and limb is the defining feature of adventure such that the adventure activity is usually something substantially different from ordinary, everyday life but also fun and exciting (Swarbrooke et al, 2003; Kane & Zink, 2004; Stanbury et al, 2005; Fletcher, 2010; Gstaettner et al, 2016). Adventure tourism is clearly different to mass tourism, but it does share characteristics such as minimising negative impacts and increasing benefits for locals with other types of tourism such as: sustainable tourism; conservation tourism; slow tourism; responsible tourism; pro-poor tourism; community based tourism; volunteer tourism; ecotourism and geotourism (UNWTO, 2014).

Cloke and Perkins (1998:185, 189) argue that with adventure tourism clients seek out "participatory experiences" involving "doing active and physically challenging things in the outdoors" and requiring specialised equipment. With adventure tourism the challenge is controlled and possible dangers are minimized through procedures, technologies and trained, experienced guides (Beedie, 2005, Trauer, 2006; Varley, 2006). For adventure tourism, there is a commercial transaction, that is, the sale of an organised guided adventure tour (Bentley et al, 2001; Buckley, 2006). This is different from adventure recreation where all risk is borne by the individual, no commercial transaction takes place, the tourist has their own equipment and the activity is either self or informally guided (Buckley, 2006; Davies, 2016).

In the UNWTO's Global report on Adventure Tourism (2014) defines adventure tourism "as a trip that includes at least two of the following three elements: physical activity, natural environment, and cultural immersion. While the definition of adventure tourism only requires two of these components, trips incorporating all three tend to afford tourists the fullest adventure travel experience – for example, a trip to Peru that involved trekking (physical activity) through the Machu Picchu trail (natural environment) and genuine interaction with local residents and/or indigenous peoples (cultural immersion)" (UNWTO, 2014: 10).

Thus, in terms of a definition, it can be said that adventure tourism is:

The sale of a guided adventurous trip or activity where there is some risk, uncertainty and challenge involved. Clients are actively and physically involved and most people experience strong emotions, such as fear and excitement, whilst participating (McKay, 2014a).

3.2. Classification of adventure tourism

Adventure activities are usually classified into three segments: **hard, soft and nature-based adventure** (Cloke & Perkins, 1998; Buckley, 2006; 2010; Schneider & Vogt, 2012; Rantala et al, 2016). It is important to note that the definitions are contested and open to interpretation, and there is general agreement that the activities occur along a continuum, with the boundaries somewhat blurred (Cloke & Perkins, 1998; Swarbrooke et al 2003). Importantly, differences lie with the degree of physical activity, risk and skills required (Cloke & Perkins, 1998; Buckley, 2006). See section 7 for more detail about exact type of activities for the three types of AT.

3.2.1 Hard adventure

Activities involving substantial risk or heavy physical activity are classified as '**hard adventure**' and usually attract the 'danger rangers' and often involve strenuous physical exertion (Buckley, 2007). Hard adventure activities are more extreme than the soft adventure category. 'Hard adventure' are perceived to be more challenging than soft adventure. Bungee jumping and mountaineering are archetypal hard adventure activities due to the possibility of serious injury or death (Buckley, 2006).

3.2.2 Soft adventure

Soft adventure is usually less risky and less physically active than hard adventure (Cloke & Perkins, 1998; Patterson & Pan, 2002; Hudson, 2003; Swarbooke et al, 2003). Soft adventure activities usually attract "non-adrenaline junkies and their families" (Hudson 2003:8). Soft adventure has some elements of adventure but is characterised by high levels of safety and fun (Patterson & Pan 2002) such as boat charters, forest walks, etc.

3.2.3 Nature-based adventure

Nature-based adventure involves physical interaction with animals, such as walking with lions, camel safaris, horse riding and in-water shark tourism (hard and soft shark cage diving). This sector forms part of the wildlife adventure economy (Buckley, 2010; Duffy, 2014). It is considered risky because any interactions with animals have the potential to become dangerous, occasionally within seconds.

3.3. International trends in adventure tourism (AT)

In order to get a better understanding of the adventure tourism industry a number of important aspects that may guide the CoCT in terms of its planning and policy making are discussed in section 3.3. After a brief glance of evidence of adventure tourism globally; characteristics of a typical adventure tourist and the adventure tour operator/entrepreneur; risk, risk management and governance in adventure tourism, and lastly environmental issues.

3.3.1 The geography of adventure tourism

Buckley et al (2015: 59) identified six large-scale exogenous trends for the global tourism sector over the next 30 years:

- The social, economic and environmental consequences of gradual warming and of extreme weather events associated with climate change;

- The effects of higher fuel costs and social concerns on mass long-haul travel;
- The role of new technologies, including social media, in marketing, managing, experiencing and monitoring tourism;
- Economic growth and social change in the highly populous and newly wealthy BRICS nations, especially India and China;
- The consequences of armed conflict and geopolitical negotiation for tourism, and the use of tourism as a tool for geopolitical interests;
- The increasing linkages, and also conflicts, between tourism and conservation in many countries. Improved understanding of these megatrends, and the interactions between them, are priorities for future tourism research.

Geographically, adventure tourism has expanded worldwide (Cheng et al, 2016). The dominant markets are **Europe, Canada and the USA**, where an extensive range of adventure tourist activities is on offer. These regions are also major source markets for adventure tourists (Sung, 2004; Lawrey, 2010). According to UNWTO (2014: 20) "in 2012, global tourism arrivals passed the one billion mark. As one of the fastest growing segments, adventure tourism arrivals naturally increased as well. In 2010, the first global adventure tourism market sizing study was conducted by the ATTA, The George Washington University (GWU) and Xola Consulting. It found that the global value of adventure tourism was USD 89 billion. The study was repeated in 2013 and found that 42% of travellers departed on adventure trips, making the sector worth USD 263 billion—an increase of 195% in two years. This remarkable growth was attributed to: (1) An increase in international departures; (2) An increase of travellers going on adventure trips; (3) An increase in average spending."

In terms of **South America**, countries such as Brazil, Costa Rica, Chile and Ecuador all offer adventure tourism products (Gyimóthy & Mykletun, 2004; Page et al, 2005; Buckley, 2007; Carnicelli-Filho et al, 2010). Australasia boasts a well-developed adventure tourism industry and New Zealand styles itself as the 'adventure capital of the world' (Bentley et al, 2001; Bentley & Page, 2001; Cater, 2006). Even small island states (such as Fiji, Samoa and Papua New Guinea) and the Polar regions have a developing adventure economy (Johannessen, 2016; Lemelin et al, 2016; Schillat, 2016). Importantly, the rise in popularity of adventure in **Asia**, especially China, but also Taiwan, Nepal, Mongolia, India, the Maldives, Malaysia and Thailand has expanded the destinations offering adventure tourism and should be viewed as potential source markets for adventure tourists (Beedie & Hudson, 2003; Gyimóthy & Mykletun, 2004; Buckley, 2007; Dar, 2014). The growth of Asia in this regard has the potential to fundamentally re-shape the future of the adventure tourism industry in coming decades due to the massive rise of adventure tourism in China which will promote AT in Asia in a big way and adventure tourists from these regions will want to explore other parts in the world. In terms of **Africa**, major sites of adventure tourism are: Egypt, Zimbabwe, Zambia, Kenya, Mauritius, South Africa and, to a lesser extent, Botswana, Uganda, Lesotho, Swaziland, Mozambique, and Namibia (Buckley, 2007; Rogerson, 2007b). However, South Africa has the best developed adventure tourism market underpinned by its large and robust domestic tourism market (Rogerson, 2007a; Visser & Hoogendoorn, 2012).

The business of adventure tourism has grown enormously in the last 20 years. Wang and Lyons (2012) for instance, claim that some 90% of all Australians have participated in some sort of nature-based adventure tourism. Adventure tourism is a proven catalyst for economic growth and SMME development (Bentley et al, 2001; Beedie & Hudson, 2003; Buckley, 2003, 2007; Gyimóthy & Mykletun, 2004; Sung, 2004; Page et al, 2005; Cater, 2006; Lawrey, 2010). Buckley (2003; 2006) also documents how adventure tourism drives global purchases of sports clothing, active wear and sports equipment. Wanhill (2000) reveals how backward linkages from this industry generate local economic growth, job creation and income. Findings in Africa suggest that adventure tourism can contribute significantly to reducing poverty (Hill et al, 2006). In particular, dive tourism in South Africa, hard adventure activities in Zambia and trekking tourism in Tanzania have all exhibited strong positive developmental impacts on local poor communities (Rogerson, 2005; Mograbi & Rogerson, 2007; Spenceley, 2010).

At an international level there is an Adventure Tourism Research Association (ATRA) - http://atra.global/. At a national level there is no uniform body that represents the adventure tourism industry. The UNWTO (2014) made four main overarching observations about adventure tourism internationally (Box 1).

Box 1: Four main observations of international adventure tourism

Adventure tourism:

Is resilient: Adventure tourists are passionate and risk-taking. The Adventure Pulse: USA Adventure Traveller Profiles indicates interest in destinations that have previously suffered significant commercial tourism setbacks due to natural and political events, such as Haiti, Rwanda, and Japan. The Adventure Travel Trade Association reports that adventure tourism operators routinely create and offer itineraries in places such as Colombia, North Korea, Iran, Rwanda, and other destinations recovering from environmental and political stress, making these destinations accessible to travellers seeking off-the-beaten path and authentic travel experiences.

Attracts high value customers: Adventure tourists are willing to pay a premium for exciting and authentic experiences. Adventure operators have reported an average of USD 3,000 spent person, with an average trip length of eight days. Trip costs vary based on length, luxury and activity levels, destinations, and distance from a traveller's starting point to the trip destination.

Supports local economies: Direct income from tourism is the amount of tourist expenditure that remains locally after taxes, profits, and wages are paid outside the area and after imports are purchased; these subtracted amounts are referred to as "leakage." The United Nations Environment Programme (UNEP) cites that in most all-inclusive mass tourism package tours, about 80% of travellers' expenditures go to the airlines, hotels, and other international companies (who often have their headquarters in the travellers' home countries), and not to local businesses or workers. Of each USD 100 spent on a vacation tour by a tourist from a developed country, only around USD 5 actually stays in a developing destination's economy. UNEP cites several studies that approximately tourism leakage to be up to 40% in India, 70% in Thailand, and 80% in Caribbean countries due to factors such as foreign-owned operators, airlines, hotels, and imported food and products. In ATTA's Industry Snapshot 2014, the adventure tour operators polled estimated that 65.6% of the total trip cost from an adventure package remains in the destination(s) visited.

Encourages sustainable practices: Adventure tourism practitioners and policymakers adhere to sustainable environmental practices. This is because they know that without pristine natural environments and meaningful cultural experiences, their destination would lose its competitiveness, and tourists would go somewhere else.

Source: UNWTO (2014: 10-11)

3.3.2 Who is the adventure tourist?

In terms of the international socio-economic and demographic profile of a typical adventure tourist, participation is skewed, with white, well-educated and wealthy people dominating (Kearsley, 1993; Beedie & Hudson, 2003; Sharpe, 2005; Fletcher, 2010). Most are males, aged between 30 and 40, with few travelling with small children (Swarbrooke et al, 2003; Sharpe, 2005; Fletcher, 2010). That said, things are changing with a massive increase in women, older people and Asian people keen on undertaking an adventure trip. The most recent statistics show that, according to the Adventure Tourism Market Study 2013, 57% of adventure travellers were male and 43% were female, 37% of have at least a four-year degree, 11% have a professional degree, and the average individual income of an adventure traveller is USD 46,800 per year (UNWTO, 2014). Furthermore, according to the UNWTO (2014: 15) “when compared with non-adventure travellers, adventure travellers were more likely to use professional services, such as guides, tour operators and boutique service providers.”

A number of international scholars argue that adventure tourists are typical ‘sensation seekers’, craving the adrenalin ‘high’ or ‘rush’ and wanting to experience fun (Todd et al, 2002; Buckley, 2006, 2012, 2016; Litvin, 2008; Morrissey, 2008; Lawrey, 2010, Sirgy, 2010). Such tourists are always on the ‘hunt’ for the next ‘rush’ (Buckley, 2006, 2012). Secondly, some participate for the physical or mental challenge, which results in a deep personal satisfaction and accomplishment (Bunting et al, 2000; Gyimóthy & Mykletun, 2004; Schneider & Vogt, 2012; Tsaur et al, 2013). Thirdly, scholars found that some adventure tourists participate for social reasons and for social status (Jonas et al, 2003; Trauer, 2006; Berger & Greenspan, 2008). These kinds of tourists use social media tools, such as Facebook, YouTube, Instagram and Twitter, to share their experiences and photos. This is why so many engage in adventure tourism in groups, either with friends, business colleagues or family members.

The study of the UNWTO (2014: 15) has shown that research online is the main source of preparation for an adventure trip (Figure 1).

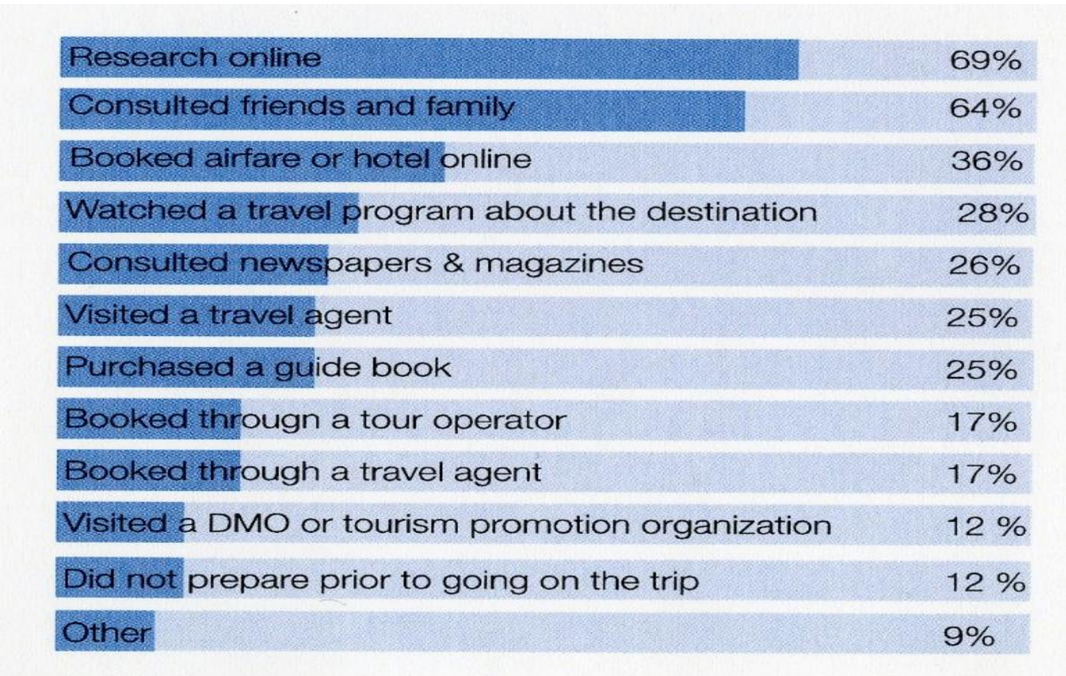


Figure 1: Ways in which adventure travellers prepare for their trips (Source: UNWTO, 2014: 15)

3.3.3 Who is the adventure tourism entrepreneur?

Unfortunately, there is a paucity of literature on adventure entrepreneurialism, but some ground work has been undertaken by Cloutier (2003). Most are small scale operations (although larger scale operations were emerging) often run by former adventure guides (Bredvold & Skålén, 2016). Many adventure tour operators were once adventure enthusiasts who then turned mastery of and passion for their 'serious leisure' activities into a business enterprise and leverage the networks of contacts they forged while mastering the activity (Marchant & Mottiar, 2011).

Thus, the adventure business often represents the economic manifestation of 'serious leisure' activities (Weber, 2001; Beedie, 2003; Trauer, 2006; Buckley, 2007). Such entrepreneurs need support in terms of: staff- and owner-training, investment decisions, supply of capital for their enterprises (e.g. funds to purchase boats, ropes and other equipment), capital to cover their overhead expenses (e.g. rents, salaries and insurance) and help with fostering networks with other tour operators (Bosworth, & Farrell, 2011; Carlisle et al, 2013). Governments also need to take cognisance of the fact that these enterprises are usually less resilient to financial stresses or sudden/extensive regulatory changes.

Most adventure tourism operators use a variety of marketing methods such as retail shop front displays; brochures; flyers; booths at specialised shows, middlemen selling packages, the World Wide Web, as well as, social marketing tools such as Facebook and Twitter (Levinson & Milne, 2004; Lew, 2008).

Many African operators (e.g. those marketing Mount Kilimanjaro, the many adventure activities at Victoria Falls and Red Sea diving) also make extensive use of packaged holidays that are sold through tourist 'middlemen'.

3.4 Risk, risk management and governance in adventure tourism

Risk and safety concerns dominate the adventure tourism literature, with much of the scholarly work done by Tim Bentley and Stephen Page (see Bentley et al, 2000; Bentley et al, 2001; Bentley & Page, 2001; Page et al, 2005; Bentley et al, 2008; Thomas et al, 2011). Importantly, it has been argued that "risk and adventure are [only] celebrated in a social sense" as the risk only "exists in a context of *risk reduction*[1] and control" (Dickson & Dolnicar, 2004; Beedie, 2005:38). Thus, to attract clients, operators promote the notion of risk but have to assure them that they will be safe (Kane & Zink, 2004; Fletcher, 2010). As Cater (2006) argues, adventure tourists do not want to face real danger; rather they want enjoyment, thrills and excitement. But adventure tourism, although not inherently life threatening, is not risk free (Weber, 2001; Cheng et al, 2016).

[1] Disaster risk reduction refers to all the elements that are necessary to minimise vulnerabilities and disaster risks throughout a society. It includes the core risk reduction principles of prevention, mitigation and preparedness (SA National Disaster Management Framework, 2005).

3.4.1 Accidents

Bentley et al (2000) and Page et al (2005) have classified accidents in both the adventure tourism and adventure recreation sectors as either: (a) serious incidents, involving hospitalisation for more than 48 hours or death, or (b) minor incidents, cuts, bruises and incidents that require no hospitalisation or hospitalisation for less than 48 hours. They found that minor incidents, as a result of slips, trips and falls occurred far more frequently than serious incidents. Adventure recreation is more dangerous than adventure tourism. Water-based commercial adventure activities are riskier than land or air based activities (Bentley et al, 2008). Injury usually is an outcome of interplay between client, equipment and environmental factors (Page et al, 2005). Many injuries can be prevented with good safety practices and risk management programmes (Cater, 2006). In addition, for operators insurance is essential, from insurance for loss or damage to equipment to medical insurance and legal insurance (Buckley, 2010).

3.4.2 Legal compliance

Injuries or death can result in financial losses, liability claims or an inability to secure insurance (Bentley & Page, 2001; Dickson & Dolnicar, 2004; Buckley, 2010). Most adventure tour operators rely heavily on waivers, disclaimers and on 'at-your-own-risk' policies. However, disclaimers or waivers do not exonerate operators from the common law duty of care (Bentley et al, 2001; Buckley, 2006). Operators still have to ensure that all foreseeable risk is eliminated; make the client is made fully aware of the dangers beforehand and ensure that the client voluntary decides to participate despite knowing the risks (Cater, 2006; Buckley, 2006).

3.4.3 Industry regulation

An emerging international trend is a move to formal, industry specific regulations (Bentley et al, 2001; Bentley & Page, 2008; Page et al, 2005; Williams & Soutar, 2005; Buckley, 2006). This can be viewed as a maturing of the industry, recognition that self-regulation is insufficient to protect the industry and its clients (Williams & Soutar, 2005; Buckley, 2006). New Zealand has for example been very innovative and introduced a **notification-only, registration and licensing schemes** in terms of the safety assurance:

- A *notification-only scheme* would involve a one-off listing on an online database and declaration against certain requirements.
- The *registration scheme* would be complemented by ensuring details are correct and the operators are continuing to comply with their safety plans. Operators who did not register would be barred from operating. Operators found to be operating without registration would be prosecuted. A public register could be used as an enforcement tool.
- A *licensing scheme* would involve the same requirements as the registration scheme but also that operators apply for a licence on a periodic (perhaps three-yearly) basis.

Various International Standards Organisation (ISO) regulations pertaining to safety in adventure tourism, such as:

- the ISO 21101:2014 on safety management[2]
- ISO/TR 21102: 2014 on skills and competences required of adventure tourism leaders[3] and the
- ISO 21113:2014 on information for participants[4] have been drawn up.

Approaches to managing safety are generally inconsistent across activities, environments and responsible agencies – see Box 2.

Box 2: Dilemmas of approaches to managing safety

There is a reasonable rationale for managing safety in different situations. In many cases this reflects the need for approaches that are 'fit for specific purpose'. Specific compulsory controls have also emerged in areas with the greatest perceived need; for example, where accident statistics have warranted specific attention. This also reflects an approach where agencies have specific expertise in a general environment. However, this situation creates safety problems for the following reasons: • There is a high variation in safety guidance to the sector and accepted industry practice between activities • Some activities (even those with specific controls) have weaknesses in some aspects of safety controls (for example, under-reporting of accidents) • Some non-compulsory approaches are at similar levels to compulsory systems (e.g. sea kayaking) while others are much less developed • There is no overall system which proactively identifies and addresses gaps and assesses whether they pose significant safety risks • Risk profiling and an analysis of the level of controls for each activity showed that some activities with high levels of inherent risk are controlled by some legislation plus industry guidance, while other high-risk activities are covered by activity-specific rules • With different approaches across multiple agencies there is a risk that safety standards will fall between jurisdictional cracks and that there will be barriers to sharing safety information (including learning from accident reporting). There is no system for preventing these problems or ensuring valuable 'whole of sector' safety coordination occurs.

Source: Department of Labour, New Zealand (2010)

However, ISO standards are problematic as they are costly. Many small operators (and certainly ones in developing countries) are highly unlikely to afford to even access them, let alone apply them in their operations. Nor are these ISO standards mandatory. However, overregulation is also a concern. Too many pieces of legislation, policies and regulations are usually a hindrance to doing business, drive up costs and do not automatically ensure an impeccable safety record (Techera & Klein, 2013; Dawson et al, 2017). Overall, there needs to be a balance between legislation, implementation, enforcement and self-regulation between government and the adventure tourism industry enterprises.

3.4.4 Reporting

A good vehicle for risk management that policy makers can consider is to establish a system for operators to report incidents and insurance claims. The adventure industry is bedevilled by a culture of under-reporting, mainly because most countries do not require injuries to be logged and operators seldom diligently record incidents, especially minor incidents. A reporting

[2] https://www.iso.org/obp/ui/#iso:std:iso:21101:ed-1:v1:en
[3] https://www.iso.org/obp/ui/#iso:std:iso:tr:21102:ed-1:v1:en
[4] https://www.iso.org/obp/ui/#iso:std:iso:21103:ed-1:v1:en

system will enable the development of comprehensive datasets, without which actual risk is impossible to quantify (Page et al, 2005). A lack of data means that the industry often has an unjustifiably bad reputation. One negative incident will have a negative perception on the industry. Hence, a good dataset can assist with good communication. Thus, although apparently counter-productive, keeping records of all incidents could demonstrate that the risks associated with participation in adventure tourism are minimal (Goode et al, 2014). Improved monitoring should impact positively on both tourist perceptions and on insurance premiums. It should also be able to mitigate against the bad publicity that invariably arises if there is a fatality (Page et al, 2005; Cater, 2006).

3.4.5 The role of guides

Guides play a critical role in adventure tourism (Beedie, 2005; Pomfret, 2006, 2011; Clinch & Filimonau, 2016; Pabel & Pearce, 2016). With soft adventure, guides play a facilitation role, supervising and managing the participants. With hard adventure, guides play a risk-mitigation-role. They operate at the crucial interface between safety and danger. With hard adventure, guides are more likely to be professionals, able to command good salaries, and forcing operators to employ a lot of them (Buckley, 2010). Guides enforce procedures to mitigate risk (e.g. by insisting that clients wear lifejackets, ensuring that helmets are worn properly) and manage the equipment (Pomfret, 2006, 2011; Mackenzie & Kerr, 2013; Clinch & Filimonau, 2016; Pabel & Pearce, 2016). They have to be alert to potentially risky situations and adapt the tour to reduce the risk or even abort it should the situation have the potential to spiral out of control. This is especially true when it comes to dealing with the weather (Bentley & Page, 2008). Much of the risk, skill, 'work' and know-how lies with the guides, not the client. As such this represents the commodification of adventure (Cloke & Perkins, 2002).

3.5 What are the environmental issues pertaining to adventure tourism?

The close relationship between adventure tourism operators and the natural environment means the potential environmental impacts must be considered. Importantly, both Williams and Soutar (2005: 247) and Thomas et al (2011) found that adventure tour operators often operate "close to the edge", impacting negatively on natural resources.

3.5.1 Environmental footprints

All adventure tour operators have a negative impact on the environment, much the same way as any business does. This includes an energy footprint, carbon footprint, water footprint and waste footprint, amongst others (Coles et al, 2016). Thus, managing their consumption of energy and water down, as well as lowering their carbon footprint and reducing waste are a set of practices that all adventure tour operators should implement (Aldaya et al, 2011; Cazcarro et al, 2014; Manomaivibool, 2015). But, adventure operators, due to both the nature of the activities and their geographic location may also have additional, specific impacts that need to be measured, reduced and mitigated.

3.5.2 Nature-based footprints

Nature-based adventure tour operators have many environmental impact concerns to deal with. Usually they operate either close to or in a nature reserve or Marine Protected Area (Buckley, 2010). As such, the ecosystems are highly sensitive and of national, if not international, importance (Edgar et al, 2007). Secondly, the tour operator is offering ‘close encounters’ with various iconic species such as whales, dolphins, seals, sharks, chimpanzees, gorillas and elephants (Kopnina, 2016; Moorhouse et al, 2016). All of these species are greatly threatened by habitat loss, consumptive uses, environmental pollution and climate change for example (Hooper et al, 2012; Gren et al, 2016). Thus, even small impacts on these animals may have severe consequences for the local population. Lastly, the adventure tour operators must ensure that the species are protected at all costs (Naidoo et al, 2016).

Mountainous areas are also sensitive, fragile ecosystems, vulnerable to degradation (Jodha, 2000). Thus, adventure activities taking place in mountainous areas must minimize impacts (Farris, 1998; Hadley & Wilson, 2004; Nepal & Chipeniuk, 2005; Schaller, 2014). The impacts of mountain based adventure activities include increased rates, and changing patterns of, soil compaction and soil loss, water pollution and loss of vegetation, as well as, the introduction of alien vegetation (Uusitalo & Sarala, 2016).

The existing body of international research discloses that negative impacts are also associated with mountain biking (Thurston & Reader, 2001), horse riding (Newsome et al, 2004), off-road driving and walking/hiking/trail running (Havlick et al, 2016; Svajda et al, 2016). For example, traversing a grassland or wetland by foot, bike, off-road vehicle or horse can damage the vegetation and, in some cases a path may quickly form (Martin, 2016). The loss of vegetation and soil compaction associated with paths increase run-off and soil loss (Havlick et al, 2016). There is also the strong possibility of the introduction of alien vegetation to the area (Hardiman et al, 2016; Weiss et al, 2016).

4. Adventure tourism research in South Africa

In terms of broader national studies the work of Aucamp (2006) and Rogerson (2007a) stand out in stark contrast to the fragmented and highly localised studies detailed in section 3. Aucamp's (2006) study was national in geographical scope, but was severely limited in terms of being a very small non-representative sample (of 25) operators, skewed towards those operating in the Western Cape and KwaZulu-Natal and offering horse riding and hiking activities. The main findings were that South African Tourism has limited awareness and knowledge of the adventure tourism industry and links to the private sector adventure tourism operators are weak. The work of Rogerson (2007a) is broad in geographical scope, but limited in depth. It represents an important study however, especially as it presents a profile and experiences of the operators. It found that the adventure tourism market was dominated by KwaZulu- Natal and the Western Cape. McKay (2017) has produced the most recent comprehensive review of research on the AT industry in South Africa.

4.1 Five main observations on adventure tourism scholarship in South Africa

Below is a synopsis that uses broad strokes to identify five key themes that emerge from an analysis of the academic work that has been undertaken in the country.

Observation 1: Isolated studies

One the most important observations of the South African adventure tourism literature is that most of the scholarly work represents isolated studies focused on small sub-sectors of the adventure tourism sector. Studies that fall into this category would include trekking/hiking (Hill et al 2006; Linde & Grab, 2008; Geldenhuys et al 2016); shark fishing (Dicken et al 2006); the Berg River canoe marathon (Tseane, 2006) and tiger shark diving (Dicken & Hosking, 2009; Du Preez et al 2012).

Observation 2: Sub-sector overviews

A second important observation is that only a few represent (in totality) an overview of a particular sub-sector. This includes studies on surfing, backpacking, the sardine run, SCUBA, bungee jumping and white water rafting. Thus, there are significant gaps in the body of knowledge on the adventure tourism sector as a whole. Some of the earliest work undertaken in South Africa on adventure tourism is that of surfing by Thompson (2001, 2008, 2011a, 2011b, 2015, 2016); Preston-Whyte (2002) and Ntloko (2006). The exploration of adventure tourism from the perspective of hospitality and the tourist accommodation sector have been undertaken by scholars such as Visser & Barker (2004); Visser (2004a, 2005); Rogerson (2007b) and Sixaba (2013) who have all explored backpacking. The sardine run has also been investigated by a number of authors (see Manana, 2009; Dicken, 2010; Hutchings et al 2010; Myeza et al 2010) to the extent that Van Der Lingen et al (2010) were able to produce an overarching overview synthesising the work of these scholars. SCUBA dive tourism has attracted a number of scholars (see Schleyer & Tomalin, 2000; Walters & Samways, 2001; Sjursaether, 2006; Mograbi & Rogerson, 2007; Seymour, 2013; Lucrezi et al 2013; Dicken, 2014; Geldenhuys et al

2014). The bungee jumping industry has been subject to some investigation (see McKay 2013; McKay 2014a; McKay 2014b), as has the white water rafting industry (see Greffrath & Roux, 2011; 2012; McKay 2013; 2014c; 2015).

Observation 3: Interdisciplinary approach

A third observation is that few are rooted in the adventure tourism literature. In this regard, the cross over or intersection between adventure tourism, adventure recreation, sports tourism and ecotourism is evident. For example the bodies of work on surfing focus on surfing as a community, the surfing culture and surfing history, and so take the form of studies on adventure sport rather than on what would be typically considered adventure tourism, but rather adventure recreation. Although international perceptions of backpacking are that it is as a type of adventure tourism (see Cave & Ryan, 2005), the South African literature has explored backpacking mainly as an accommodation type with additional work on who the typical backpacker is, the relationship between backpacking and public transport, as well as the geography of the backpacking economy. As for surfing and backpacking, the lens of the adventure tourism literature has not been used to interrogate the sardine run, rather the issue has been viewed from a local economic perspective (Manana, 2009; Dicken, 2010; Myeza et al 2010) or from a zoological/marine science perspective (Hutchings et al 2010). In this regard the work on SCUBA, bungee jumping and white water rafting are substantially different as much has been argued from an adventure tourism literature base, such as who the participant (SCUBA diver, white water rafter) is, what their motivations are, the size of their economic impact and/or managing environmental impacts or resource use conflicts.

Observation 4: Geographic scale – regional approach

Fourthly is the emergence of a body of knowledge undertaking a more regional examination of the sector, but this is still characterised by a narrow geographical scope, usually confined at best to one province. At a regional level, much of the work has taken the form of student dissertations, such as that of Lightbody's (1994) study on how to promote active tourism in the southern coastal regions of the Cape; Chili's (1999) regional study adventure tourism in the Valley of a Thousand Hills; Govindasamy's (2012) regional study of adventure tourism in KwaZulu-Natal and Chigamba *et al* (2014) of how to foster entrepreneurial skills in adventure tourism businesses in the Eastern Cape. Fitting into a regional approach is also that of Bosch (2015) which explored the types of adventure tourism demands of visitors to South African National Parks and Tshipala (2013) who draw up a list of indicators for sustainable adventure tourism destinations. Another regional level study is that of Swart (2010) which and looked at the challenges facing the adventure tourism industry in the Western Cape.

Observation 5: Motivations and human-environmental impacts

Fifthly is the more recent emergence of exploring particular themes such as motivations and human-environmental impacts. All, however, are limited in geographical scope. Within this body of work is that of Saayman et al (2009) and van der Merwe et al (2011) both of which explore the motivations behind the purchase of a trip to specific marine destinations such as Jeffery's Bay and other small coastal towns. It also includes the studies by Lötter et al (2014), on the motivations and profile of adventure tourists in Greater Pretoria and the work of Giddy (2014) and Giddy & Webb (2016) who explored what motivates people to undertake an adventure activity in the Tsitsikamma area. Taking a more economic lens are the works of Oberholzer et al (2010) on the economic impacts of tourism to the Tsitsikamma Marine Park; Tshipala & Coetzee (2012) on an adventure tourism development framework for Thathevondo and Tshipala, Coetzee & Potgieter (2014) on the role of stakeholders in adopting sustainable tourism indicators in Waterval Boven. The exploration of adventure in Tsitsikamma has been continued by Giddy (2016) with an examination of how local operators manage their environmental impacts and raise environmental awareness with their clients. Terblanche's (2012) study on the motivations driving adventure tourism trip purchases in Magoebaskloof are similarly small in scale. In terms of student work, the Nthuli (1999) study of crime and tourism in St Lucia; the Reynish-Esterhuysen (2008) study on the adventure tourism potential of Muizenberg; the Tshipala (2010) on developing a strategy for the development of an adventure tourism industry in Thathevondo also represent a thematic approach but highly localized in nature

Source: For the references cited above see McKay (2017)

In addition to academic literature has there been two other key sources of information: an industry organisational consultancy report of Southern Africa Tourism Services Association (SATSA) (2017) and the adventure tourism business role-player study of Dirty Boots (2014).

4.2 Dirty Boots study

In the Dirty Boots (2014) study, broadly speaking mirrors the results of the McKay (2017) study regarding the popularity of activities and the size of the income generated by some subsectors (such as shark cage diving), the reliance on international and domestic tourists, reliance on booking agents (and their cost), marketing using websites, insurance issues and the typical size of the adventure tourism enterprises. There are some differences however. The Dirty Boots 2014 study estimates roughly 90 different adventure activities on offer in South Africa. Unfortunately no detail is given as to how the study determined that the industry is worth R4.6 billion, number of people employed and injuries/deaths and so great caution should be exercised regarding this particular data.

4.3 SATSA study

The SATSA (2017) study draws on data provided in the Dirty Boots 2014 study in an uncritical manner. The definition of an adventure tour used in the SATSA (2017) does not reflect the literature accurately. Importantly the study included some types of cultural tourism, eco-tourism and overland tourism. The study estimates some 2370 individual adventure activities and 1957 adventure operators. This is vastly different to the McKay (2017) study that found just over 800 adventure operators. In particular, some 48 activities listed here are not similar to the McKay 2017 study, including hunting, fishing and various motor car activities. The SATSA 2017 study does however, correctly highlight the growing importance placed on legislation and regulation at the international level. The SATSA 2017 study also lists a number of regulatory authorities and national associations who are stakeholders in the adventure tourism industry – see Appendix 1. The study does identify that some fly-by-night operators represent a risk to the industry but no attempt is made to qualify the size of the particular problem, thus some incorrect assumptions may be made in the light of this gap. Furthermore, the SATSA 2017 study correctly determines that the industry is fragmented, underrepresented in terms of tourism markets and marketing needs a significant overhaul. In addition, the study correctly determines that the industry needs to adopt a risk management system and that training of guides needs to become a priority. The study also strongly recommends developing a database of activities and safety records. This recommendation is directly in line with the McKay 2017 study.

4.4 Summary of research

From current research on Adventure Tourism in SA the following trends can be highlighted:

1. Growing emphasis on the implementation, formalisation and tightening of regulations relating to the management of adventure tourism activities. This includes the promulgation of legislation.
2. Taking greater cognisance of environmental issues, of environmental ethics, the promotion of environmental awareness raising. This indulges grappling with climate change problems and managing nature-based adventure (walking with animals, etc.) as in need of strong regulation and management.
3. Focusing on aiding the growth of the soft adventure sector.
4. Targeting the family market and people over 50 to expand market share.
5. Identifying that support for small and medium sized enterprises especially through local, regional and national governments assisting with marketing of the region, locality and products is required. In this regard, the call by adventure tourism operators for the sale of packaged tours is strong.
6. Recognition that in South Africa there is a need for government support for the training and development of adventure guides.
7. The Western Cape (with Cape Town in particular) is considered the leading force in terms of number of operators followed by KZN and Gauteng – see Figure 2.

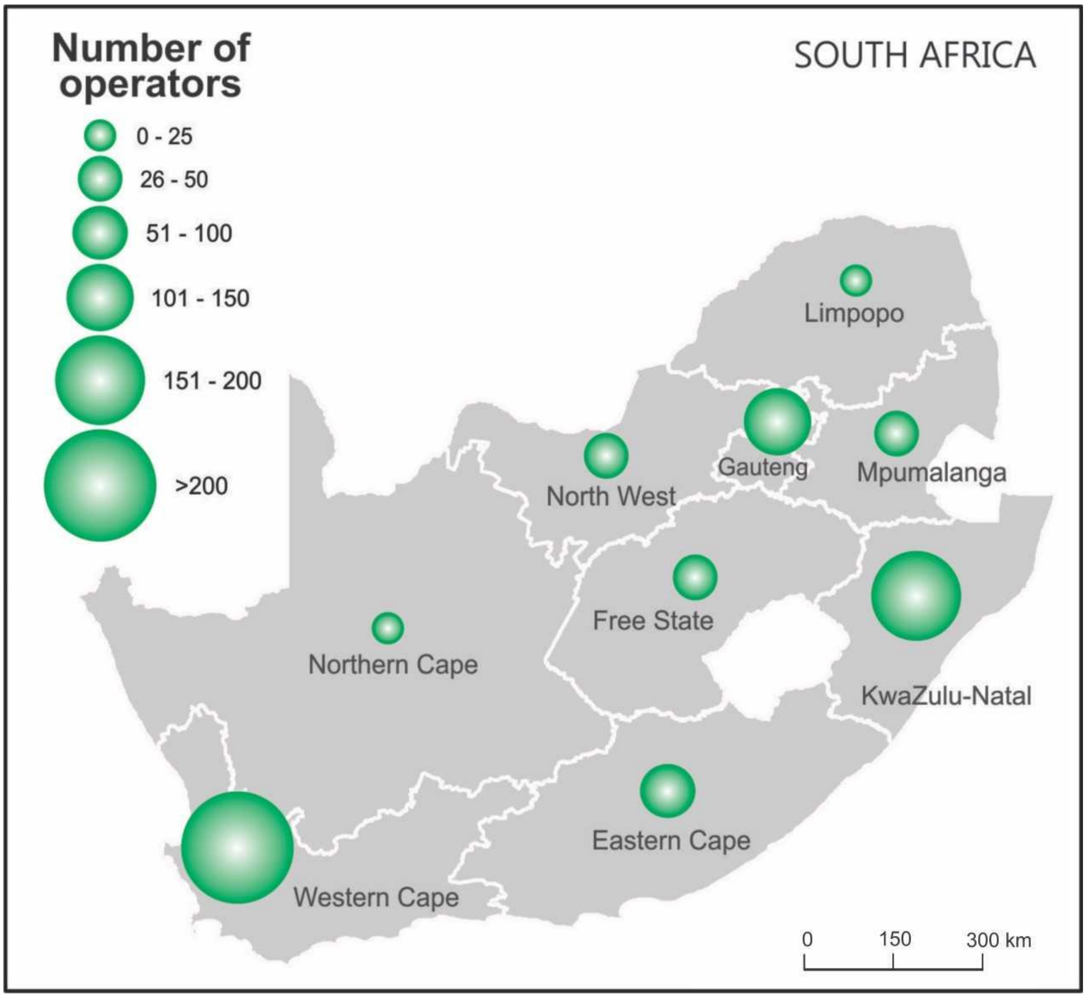


Figure 2: Spatial distribution of adventure tour operator base locations (McKay 2017: 58)

5. Adventure tourism in Cape Town

The primary aim of the study was to determine the needs of the tourism adventure sector along the coast and investigate what impacts negatively on the sector. After an explanation of the methodology, the findings of the survey among 60 AT operators in Cape Town are discussed. The findings are presented as a discussion of four broad types of issues: (1) adventure tourism activity types, (2) adventure tourism operator and operations profile, (3) managing risk in adventure tourism, and (4) adventure tourism regulation. Anonymity of participants was guaranteed so no personal details of AT operators are provided (unless they stated that their names may be made known).

5.1 Methodology

In order to execute the above project specifications the following methods were employed:

- An academic literature review was done to identify the main issues pertaining to the AT industry globally and locally
- A list of AT types as well as list of AT operators were compiled from two mains sources (SATSA, 2017 and McKay 2017) and then amended to tailor it to the needs of Cape Town.
- A questionnaire was designed to include a range of questions related to the everyday AT operator practices in Cape Town (see Appendix 2 for example of questionnaire).
- Five tourism organisations were interviewed telephonically/email.
- A map was compiled to indicate the areas where specific needs and problem areas are located.

The survey was done by means of a mixed-method approach. Potential participants in the survey were sampled randomly from the master list of operators in the city (see Appendix 3 for list of operators). At first it was decided to simply drop by their offices to do the interview. This did not work because many suggested us making an appointment, whereas others suggested we leave the questionnaire with them for self-completion and others suggested they will do it if it was an online survey. An online survey was then created using Sun Surveys (Checkbox) software. The response rates for a total of 60 surveys were as follow:

- Returns via online survey – 44 were send out and 22 completed the survey (50% return rate)
- Returns via drop-off-and-collect/drop-off-and-sending-back scanned questionnaire via email – 22 (157 emailed)
- Direct interviews – 16 (42 visited in person)
- All questionnaire data was captured in SPSS for analysis.

5.2 Adventure tourism activity types

As mentioned earlier, scholars categorise AT on a continuum of **soft** and **hard** whereas a third type, namely, **nature-based adventure** which involves physical interaction with animals, such as walking with lions, camel safaris, horse riding and in-water shark tourism are also included (Box 3).

Box 3: Adventure tourism types

Soft Adventure: refers to activities with a perceived risk but low levels of real risk, requiring minimal commitment and beginning skills; most of these activities are led by experienced guides.	**Hard adventure:** refers to activities with high levels of risk, requiring intense commitment and advance skills.
Nature-based adventure which involves physical interaction with animals, such as walking with lions, camel safaris, horse riding and in-water shark tourism.	

Source: Hill (1995)

From the many potential AT types a total of 111 have been identified that are applicable to the CoCT. These are divided into the three said categories (Table 1).

Table 1: Identified AT activities in Cape Town

Boat based whale watching	nature	Cave diving/caving	hard
Horse riding	nature	Coasteering	hard
Marine mammal swimming	nature	Croc surfing	hard
Snorkelling with seals	nature	Cycling (mountain biking)	hard
Swimming with dolphins	nature	Diving (SCUBA)	hard
Swimming with seals	nature	Dune skiing	hard
4 x4	soft	Fishing (deep sea)	hard
Acrobranch	soft	Go karting	hard
Action shooting	soft	Gyrocopter	hard
Aerial boardwalk	soft	Hanggliding	hard
Aerial cable trail	soft	Hiking (serious, very serious rugged terrain)	hard
Amazing races	soft	Jet boating	hard
Archery	soft	Jet skiing	hard
Assisted camping (where there are guides to help you camp)	soft	Kayaking	hard
Below the surface sightseeing (tunnel tours)	soft	Kite boarding	hard
Bi plane rides	soft	Kitesurfing	hard
Blokart sailing	soft	Kloofing	hard
Boat charters	soft	Land sailing	hard
Boat trips (recreational)	soft	Microlight passenger flights	hard
Camel rides	soft	Motor yachts	hard
Canopy tours	soft	Motorcycle tours	hard
Clay pigeon shooting	soft	Mountaineering	hard
Cycling (road tours)	soft	Multi-day trekking	hard
Dragon boat racing	soft	Ocean angling	hard
Fishing (shore)	soft	Ocean floor walking	hard
Foot safaris	soft	Parachuting	hard
Forest walks	soft	Paragliding (powered)	hard

Geckoing/water tubing	**soft**	**Parasailing**	**hard**
Gorge and bridge swinging	**soft**	**Pelagic boat trip**	**hard**
Helicopter flights	**soft**	**Power boating**	**hard**
Hiking (walking on good path, easy terrain)	**soft**	**Quad bike tours**	**hard**
Hot air ballooning	**soft**	**Quad Biking**	**hard**
Huey helicopter rides	**soft**	**Rap jumping**	**hard**
Karting	**soft**	**Rock climbing**	**hard**
Paintball	**soft**	**Running tours**	**hard**
Racing cars	**soft**	**Sailing (charters)**	**hard**
Scavenger hunting	**soft**	**Sailing (dinghies)**	**hard**
Scenic flights	**soft**	**Sailing (multi-hulls)**	**hard**
Scooter tours	**soft**	**Sailing (yachting)**	**hard**
Sidecar tours	**soft**	**Sandboarding**	**hard**
Snorkelling	**soft**	**Sea kayaking**	**hard**
Survivor challenges	**soft**	**Shark Cage Diving**	**hard**
Tiger fishing	**soft**	**Skydiving**	**hard**
Tobogganing	**soft**	**Stand Up Paddleboarding**	**hard**
Zip lining	**soft**	**Surfing**	**hard**
Zorbing	**soft**	**Surfski paddling**	**hard**
Caving	**hard**	**Swift water kayaking**	**hard**
Abseiling	**hard**	**Tandem hang gliding and para gliding**	**hard**
Aerobatic flights	**hard**	**Tandem skydiving**	**hard**
Aquarium diving	**hard**	**Team building**	**hard**
Bakkie skiing	**hard**	**Tubing**	**hard**
Bouldering	**hard**	**Wake boarding**	**hard**
Bungee jumping (urban and nature)	**hard**	**Water skiing**	**hard**
Cable sliding	**hard**	**White-water (hydroboard)**	**hard**
Canoeing	**hard**	**Windsurfing**	**hard**
Canyoning	**hard**		

Key:

	Soft adventure		Hard adventure		Nature-based adventure

Of the 111 activities identified in Table 1, a total of 81 are being offered by the 60 operators who participated in the survey (see Table 2) - all operators are based in the city and almost all are operating within 2 km from the coastline. The survey thus does not represent a specific market segment (e.g. hiking or skydiving, etc.). Instead the survey sample represents the AT holistically. The AT operators had to indicate on a scale of 1 (very low risk) to 10 (extremely high risk) how they view the level of risk for clients to participate in their most popular activity. Most of the activities are perceived by them as low risk (Figure 3). If the AT category scheme from Table 1 is superimposed on the single most popular activity type they offer (Table 3) it is evident that majority (66%) are generally considered to be hard (i.e. risky) as well as nature-based (also risky). There is thus a major discrepancy between what the AT operators consider to be risky and to the categorisation thereof in the literature. However, this may represent the extent to which the operators have implemented risk management strategies to lower the risk to their clients.

In terms of duration of activities, the most popular AT activity is mostly less than 2 hours whilst some activities are more than a day long (Figure 4).

Table 2: Number of operators that offer the following AT activities (colour scheme same legend as in Table 1)

AT activity	N of companies	AT activity	N of companies	AT activity	N of companies
4 x4	2	Fishing (deep sea)	3	Power boating	3
Abseiling	2	Fishing (shore)	3	Quad bike tours	1
Acrobranch	1	Forest walks	2	Racing cars	1
Action shooting	3	Foot safaris	1	Rock climbing	3
Aerial boardwalk	1	Geckoing/water tubing	1	Running tours	2
Aerial cable trail	1	Gyrocopter	1	Sailing (charters)	4
Amazing races	1	Hanggliding	1	Sailing (multi-hulls)	1
Archery	3	Helicopter flights	5	Sailing (yachting)	2
Assisted camping (where there are guides to help you camp)	4	Hiking (serious, very serious rugged terrain)	9	Sandboarding	2
Below the surface sightseeing (tunnel tours)	1	Hiking (walking on good path, easy terrain)	11	Scavenger hunting	1
Boat based whale watching	1	Horse riding	3	Scenic flights	2
Boat charters	8	Huey helicopter rides	1	Sea kayaking	4
Boat trips (recreational)	6	Jet boating	2	Shark Cage Diving	5
Bouldering	1	Karting	1	Sidecar tours	2
Bungee jumping (urban and nature)	1	Kayaking	1	Skydiving	2
Canoeing	3	Kite boarding	1	Snorkeling with seals	2
Canopy tours	3	Kitesurfing	1	Snorkelling	1
Canyoning	2	Kloofing	3	Stand Up Paddleboarding	6
Caving	2	Marine mammal swimming	1	Surfing	5
Clay pigeon shooting	3	Microlight passenger flights	1	Survivor challenges	1
Coasteering	1	Motor yachts	1	Swimming with seals	1
Croc surfing	2	Motorcycle tours	2	Tandem hang gliding and para gliding	2
Cycling (mountain biking)	11	Mountaineering	3	Tandem skydiving	1
Cycling (road tours)	2	Multi-day trekking	1	Teambuilding	1
Diving (SCUBA)	2	Parachuting	1	Tobogganing	1
Dragon boat racing	1	Paragliding (powered)	2	Windsurfing	1
Dune skiing	1	Pelagic boat trip	1	Zip lining	5

Key:

	Soft adventure		Hard adventure		Nature-based adventure

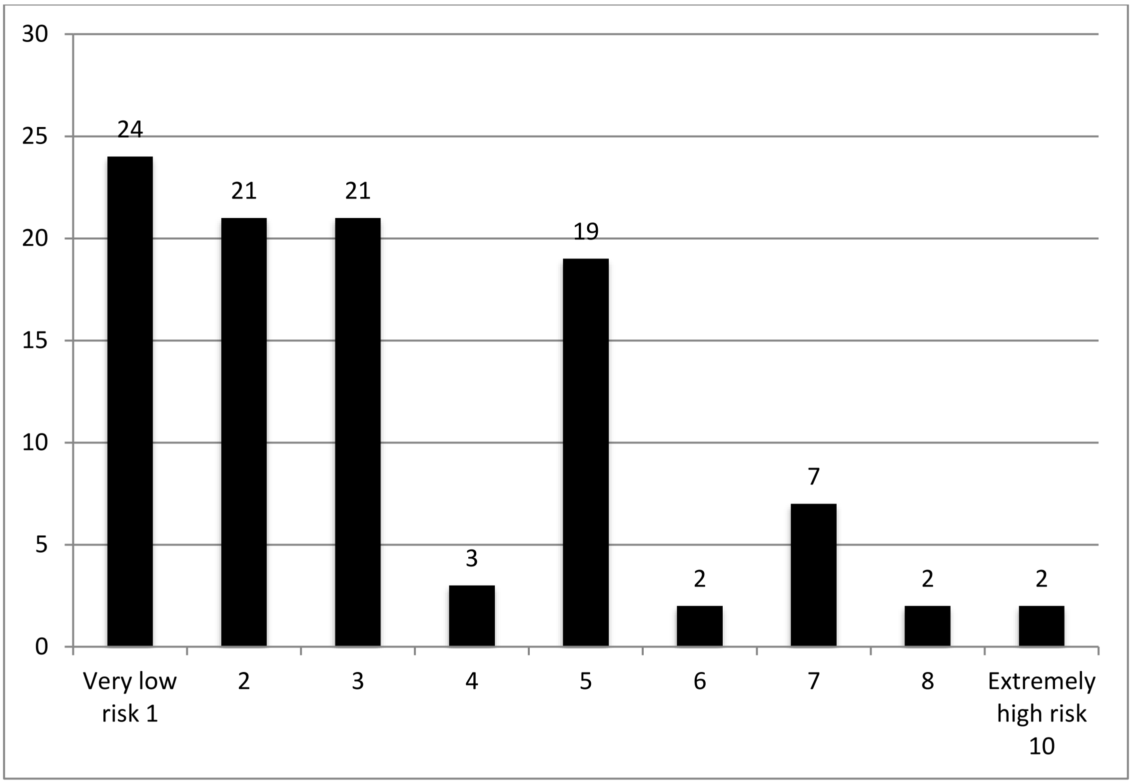


Figure 3: Perceived level of risk of most popular activity (percentage)

Table 3: Main activity of AT operator and its categorisation

Below the surface sightseeing (tunnel tours)
Boat charters
Canoeing
Clay pigeon shooting
Cycling (road tours)
Diving (SCUBA)
Dragon boat racing
Fishing (deep sea)
Gyrocopter
Hanggliding
Helicopter flights
Hiking (serious, very serious rugged terrain)
Hiking (walking on good path, easy terrain)
Horse riding
Karting
Kayaking
Kite boarding
Kitesurfing
Motorcycle tours
Paragliding (powered)
Power boating
Sailing (charters)
Scenic flights
Shark Cage Diving
Sidecar tours
Skydiving
Snorkeling with seals
Surfing
Tandem hang gliding and para gliding
Tandem skydiving
Teambuilding
Tobogganing

Key:

	Soft adventure		Hard adventure		Nature-based adventure

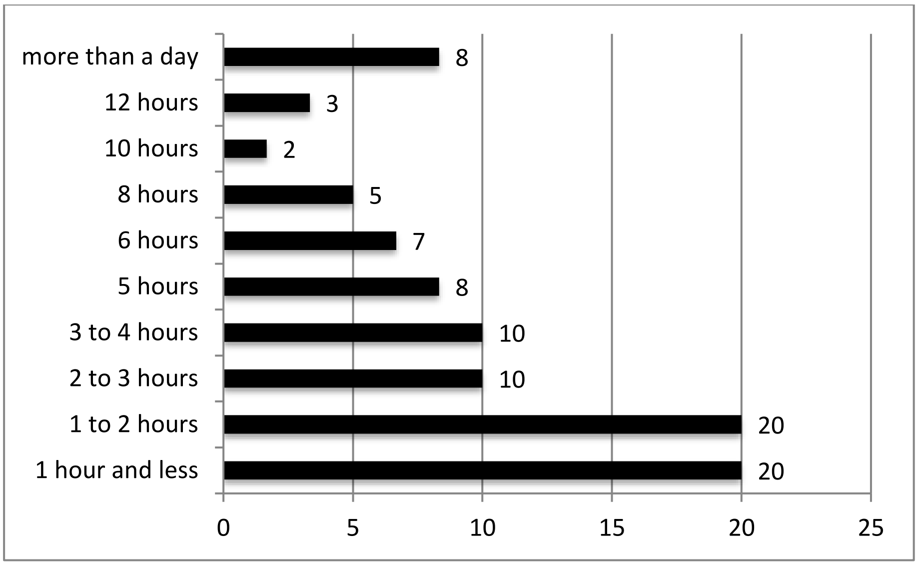


Figure 4: Duration of most popular activity (percentage)

The maximum number of participants per most popular activity offered by AT operators is shown in Figure 5. Naturally, paragliding for example will be able to accommodate one participant at a time, a cycling trip can maybe take up to 10, a boat trip up to 300 and teambuilding up to 800.

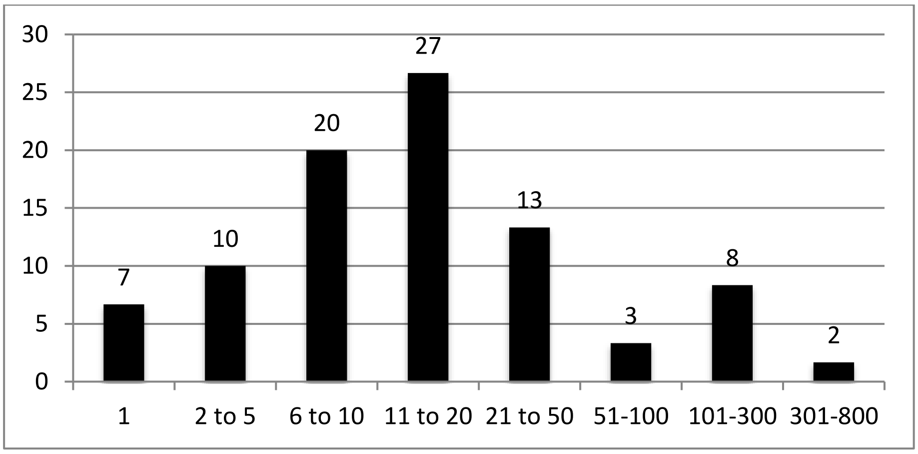


Figure 5: Maximum number of participants at a time per main activity type (percentage)

5.3 Adventure tourism operator and operations profile

The operators range from small to medium sized businesses with one business employing as much as 88 permanent staff. On average 9 persons are employed full-time and this is the same for part-time/seasonal staff. However, one operator employs as many as 100 part-timers. In Figure 6 it is seen that the mode for employment groups was between 2 to 5 persons (both full-time and part-time). The average number of years that the AT operators have been in operation ranges from relatively new start-ups of 2 years ago up to one operator that has been in business for 44 years. The average number of years in business is 15 years (Table 4), hence, a reasonably established business profile. Although the majority of operators have been in business for more than ten years is there is a significant percentage (one third) of those who have been operational since 2012 (Figure 7). Majority of the clients of AT operators are international visitors (60%) with a quarter of their clients being are Cape Town residents (Table 5). The promotional strategies used in AT reflects the fact that most players in the sector are small and medium-sized enterprises where the emphasis is on finely targeted activities that maximise cost-effectiveness (Swarbrooke et al., 2003). A quick scan of some of the AT businesses' websites show great creativity in marketing their products (Figure 8 and 9).

Table 4: Company operations

Business operations	Min	Max	Average	Std. Deviation
Number of years company been in operation	2	44	14.93	9.064
Number of people employed on a full-time basis (inclusive of sole-proprietor)	1	82	8.58	13.993
Number of people employed on part-time basis/seasonal basis	0	100	9.07	14.133

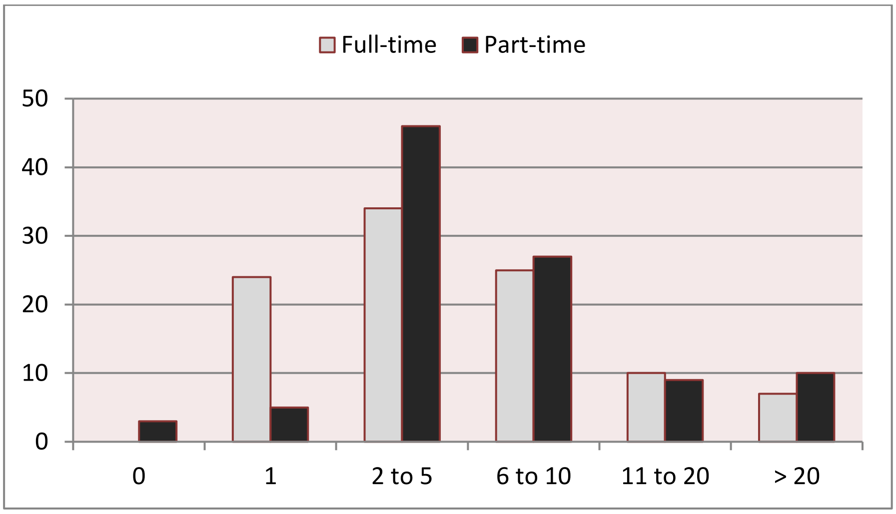


Figure 6: Operators who employs full-time and part-time staff in six company employment group sizes (percentage)

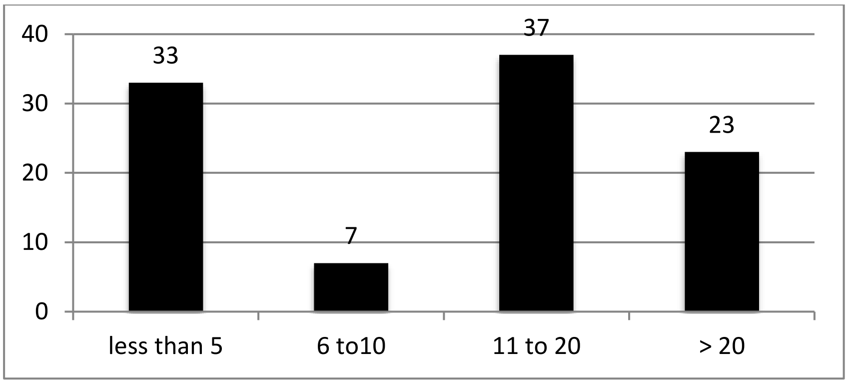
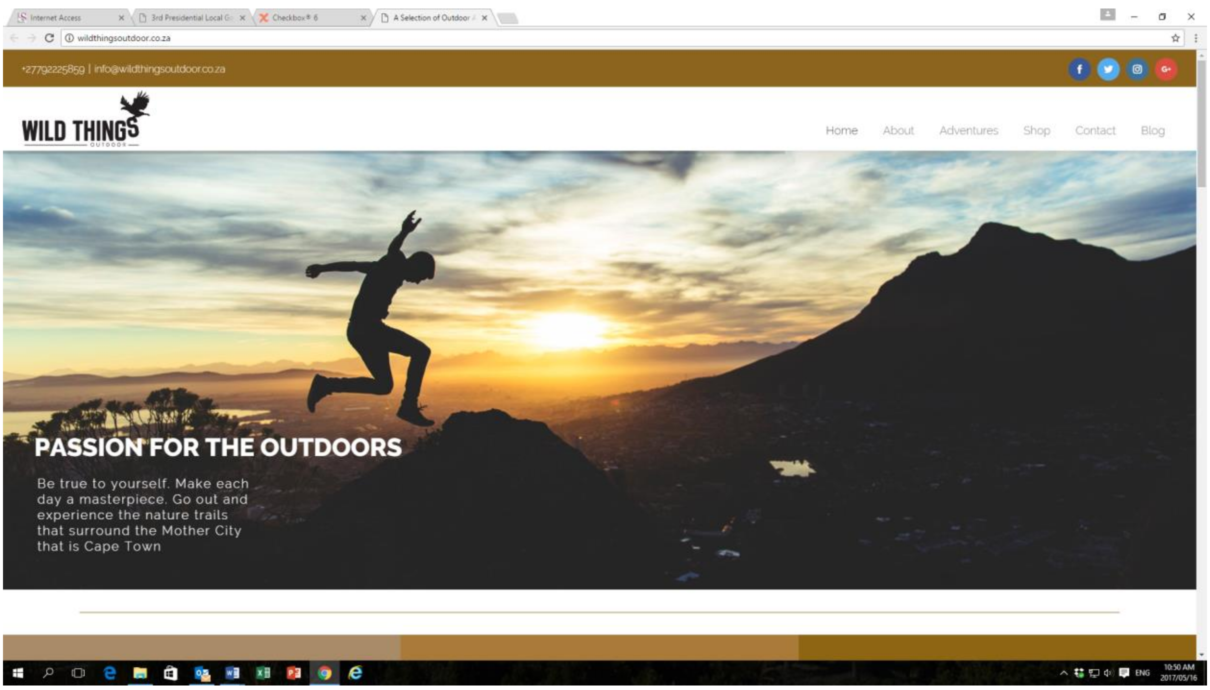
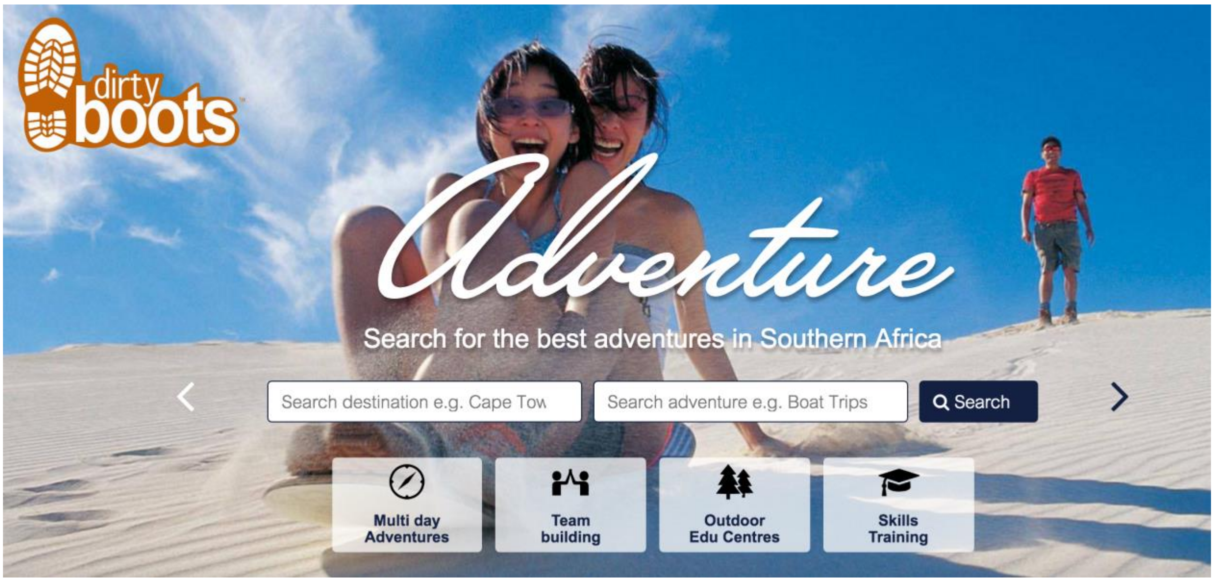


Figure 7: Number of years in operation in years grouped (percentage)

Table 5: Origin of clients (please note that these are guesstimates)

Estimations of where clients come from	Average	Std. Deviation
Estimated % of clients from Cape Town	24.80	26.899
Estimated % of clients from elsewhere in the Western Cape	5.68	6.531
Estimated % of clients from elsewhere in the country	9.88	10.186
Estimated % of clients are international	60.40	32.934





Figures 8 (previous page) & 9: Screenshots of Wild Things and Dirty Boot's websites

Figure 10 indicates the number of trips/sales the operators have undertaken during 2016 for their main activity and Figure 11 the amount it cost to take part in this activity type in rand. Although most activities cost less than R500 are there a number of activities that are very costly and would set back a participant up to R10 000 per trip (for example deep sea fishing trip).

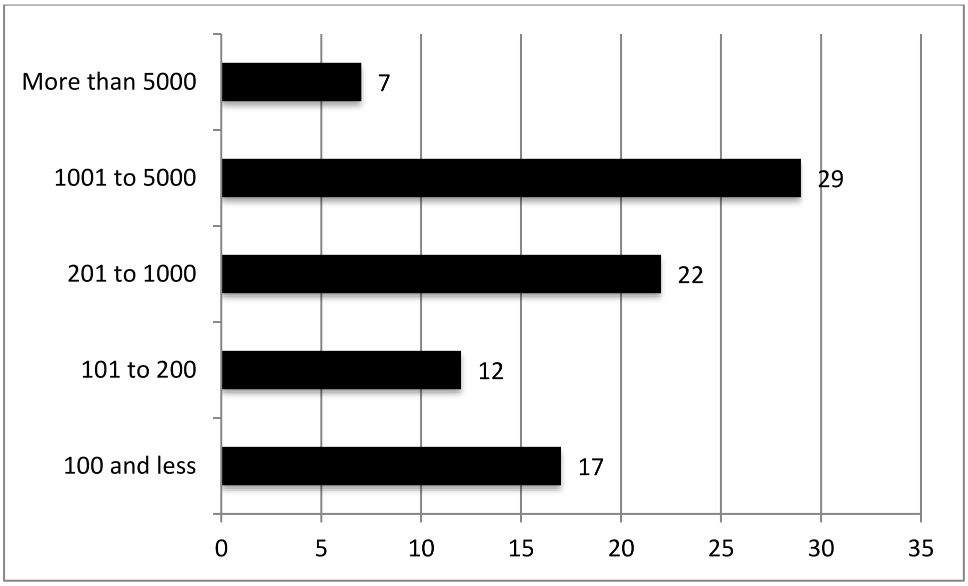


Figure 10: Number of sales/trips per main activity in 2016 (percentage)

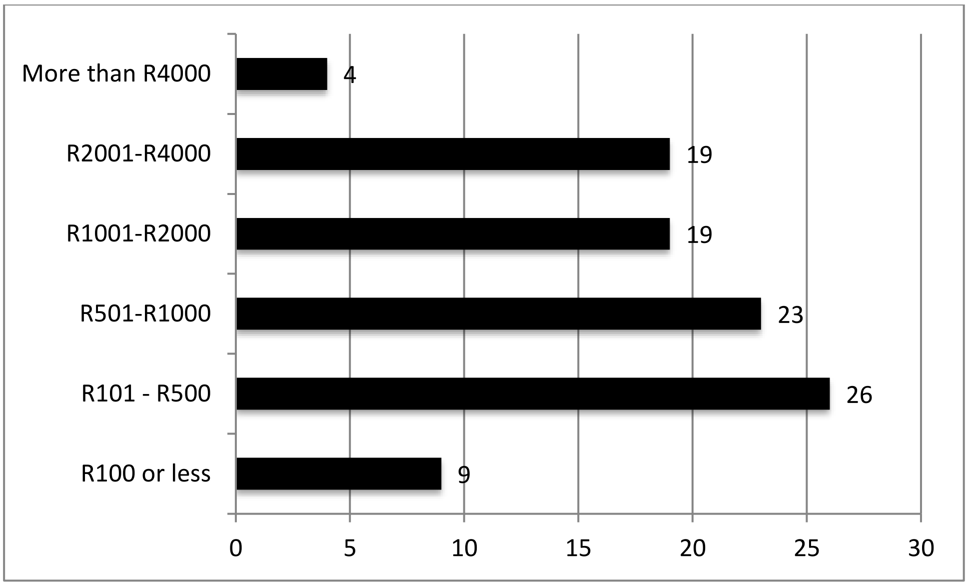


Figure 11: Cost to undertake the main activity in 2016 (percentage)

5.3.1 Affiliations

Almost three quarters (44 out of 60) of the operators are affiliated or is a member of some organisation that represents their interests. Just less than half (27/60) are members of Cape Town Tourism (CTT). The second most affiliated organisation is SATSA (8/60). Select few are members of other Cape Town organisations such as:

- Cape Charter Boat Association
- Cape Town Guides Association
- Cape Town Chamber of Commerce
- Cape Town Guides Association

Some operators are also affiliated to national associations such as:

- African Paddling Association (APA)
- Adventure Travel Trade Association (ATTA)
- CAA Aero Camp SA
- MISASA (micro lights)
- SAGPA (gyro); Surfing SA (SSA)
- International Kite Surfing Association (IKA)
- SA Kite Boarding Association (SAKA)
- Clay Target Association SA (CTSASA)
- SA Rope Course Association (SRCA);
- SAACI
- SITE
- SANPARKS (only one respondents is in some way affiliated to SANPARKS)
- SA Mountaineering Development and Training Trust
- Mountain Club of South Africa
- SAHPA
- SAYTC
- Hospitality Association Namibia

- Stellenbosch 360

5.3.2 Reasons for affiliations

Networking is the main reason to be affiliated to an industry-related organisation. However, other important reasons given by respondents included: Access to international markets; staying abreast of latest legislation; updates on trends and it serves as marketing platform. Reasons also relate to the credibility and exposure to marketing of their products through these organisations, however, others noted that industry standards regarding safety, operational standards, guide training and certification updates are received from these associations. Whilst some were very appreciative of what CTT does (one respondent said “very important to keep in touch with all related to tourism and economy. Also always able to assist with any problems/queries regarding smooth running of business and up to date news regarding tourism”) others (8 out of 27) are negative and said that they see no benefits of being a member of CTT. For example, one respondent said “before internet became popular and before clocktower closed CTT was of use.”

5.4 The role of organisations in the AT industry

To get a better understanding of the role that organisation play in the industry the following organisations were contacted for their inputs: Johan Radcliffe - Dirty Boots; Sean Amor - Cape Chartered Boat Association; Hannelie du Toit - Southern Africa Tourism Services Association (SATSA), Marisah Nieuwoudt – Cape Town Tourism (CTT); Hendrik Human - Tours and Travel South Africa (TATSA); Steven Barber - Mountain Club South Africa Cape Town (MCSA CT); Steven Burd - Glen Country Club; Denise Hopkins - Trails Club South Africa; Inge Dyman - WESGRO.

The CTT and SATSA contacts assisted the project by providing a Cape Town database of adventure tourism operators which was similarly done so by SATSA who in addition also provided a 2017 report on the AT industry in South Africa. Dirt Boots, a company based in Cape Town provides an adventure holiday and activity directory is by far the biggest private (albeit with sponsorship) role-player that actively tries to organise and market AT collectively. They conducted their own industry survey in 2014 and this survey informed the 2017 study of SATSA. They are also hosting the first South African Adventure Summit in the Overberg in September 2017 that will see them bringing the country's adventure community together to assist in creating a highly-driven and professional industry. According to Johan Radcliffe after attending a very successful 2016 World Adventure Summit in Alaska he returned home to South Africa motivated to create a similar event. "For a while, I have thought about arranging the first-ever get-together of the South African adventure community - operators, event organisers, participants and competitors. Attending the Summit in Alaska provided the stimulation to start working on it." After speaking to all the major players in the South African adventure industry to gauge their interest and to obtain an indication of their willingness to attend he confirmed that "without exception, there is a lot of excitement about the possibility of such a gathering. The emphasis will be on the technical aspects of adventure operations and our theme for the Summit will be 'KEEP IT REAL!'”. Speakers for the Summit have already been confirmed and the topics to be covered will include issues such as international and domestic adventure marketing, SANParks and adventure tourism, adventure tourism, regulations, risk management, and adventure guiding and guide registration. A highlight of the summit is one day of adventure activities, scheduled before the work starts. "We already have over 100 fully-sponsored seats available on different adventures in and around Cape Town, including kloofing, sea kayaking, sand boarding, chauffeured vintage sidecar tours, shark-cage diving, canopy tours, hot-air ballooning and many more great adventures.” The summit will be sponsored by ActivityBridge, SATIB, Ark, Cape Nature and Dirty Boots.

Some of the other associations that may potentially be of value to AT operators indicated that they are not commercial entities and hence cannot inform AT operators on what to do and not to do in their everyday practice. For example, the “Glen Country Club has a paragliding section within its membership. The paragliding membership of the Glen Country Club comprises individuals that paraglide socially and/or professionally, however the Glen Country Club per se does not engage with adventure tour operators or the CCT as it is not performing a commercial paragliding operation, nor does it have input on aspects pertaining to the use of the mountain as it relates to either adventure tour operators or the CCT. The above statement explains the overlap between adventure tourism and adventure recreation mentioned earlier. Adventure tour operators would typically engage with commercial paragliding businesses directly as opposed to via the Glen Country Club.” Similarly, Mountain Club South Africa Cape Town generally has no interaction with the adventure tourism groups. They do represent the interests of their members and engage with the city and SANPARKS from time to time if issues arise relating to Table Mountain National Park that impact their members, but this tends to be on an adhoc basis and they cannot recall any issues recently that specifically involved adventure tourism operators. Representation from the Cape Chartered Boat Association indicated that they experience major problems with the scheduled quarterly forum meetings with Department of Agriculture, Forestry and Fisheries (DAFF). In the past year this meeting has not taken place at all. Issues raised as problem areas in the boat charter industry are listed in section 5.7.2. Tours and Travel SA suggested we speak directly to their members because they do not necessarily want to do so on their behalf.

5.5 Managing risk in adventure tourism

In an industry with a degree of risk one would assume that qualified staff is a necessity. It is viewed by majority of operators to have qualified staff that meet accredited training course qualifications: 81.7% said that it is important. Having a certified training qualification is still important but not so much as the aforementioned: 75.8% indicated it is important. Managing risk in commercial adventure travel operations is necessary for the safety of travellers and to avoid litigation in the event of an accident. Buckley referred to in UNWTO (2014: 66) provides a holistic manner for assessing the risk aspects of running an adventure tourism business other than the basic safety and physical risks associated with AT (see Box 4).

Box 4: Viewing risk across six categories

· **Commercial:** The standard commercial risks associated with business management. Examples specific to tourism include travel market downturns or drops in visitors due to changing consumer preferences, terrorism, natural disasters, exchange rate shifts, and more.
· **Legal:** Permits and licenses required for adventure tour operators to operate legally; ensuring that contractual arrangements with commercial partners and suppliers are appropriate.
· **Medical:** Depending on the destination, conditions, and activities involved in the trip, advanced screening may involve age, strength, and general health. Risk factors here include fitness and pre-existing medical conditions.
· **Operational:** Operational logistics of risk, such as itinerary details, gear, lodging and vehicle maintenance, and quality, as well as emergency operations, such as medical evacuations, carrying first aid kits, and guide training in field medicine.
· **Physical:** Physical safety during Physical safety during the adventure activity; the prevention of injury or disease. As mentioned above, this aspect garners the most sector attention.
· **Social**: Managing interactions among clients, between clients and guides, and between the group and people in the community. Group harmony is important on adventure travel trips.

Source: UNWTO (2014: 66)

The failure to manage risk effectively can have four related negative consequences for the business of an AT operator (Figure 12). "Adventure tourism operators need to become much more aware of the risk involved in their activities; physical and legal areas have the potential to impact severely on their level of financial risk and business viability. The main recommendation would be for all operators to ensure that they are covered for public liability, including exemplary damages or punitive damages[5]" (UNWTO, 2014: 69).

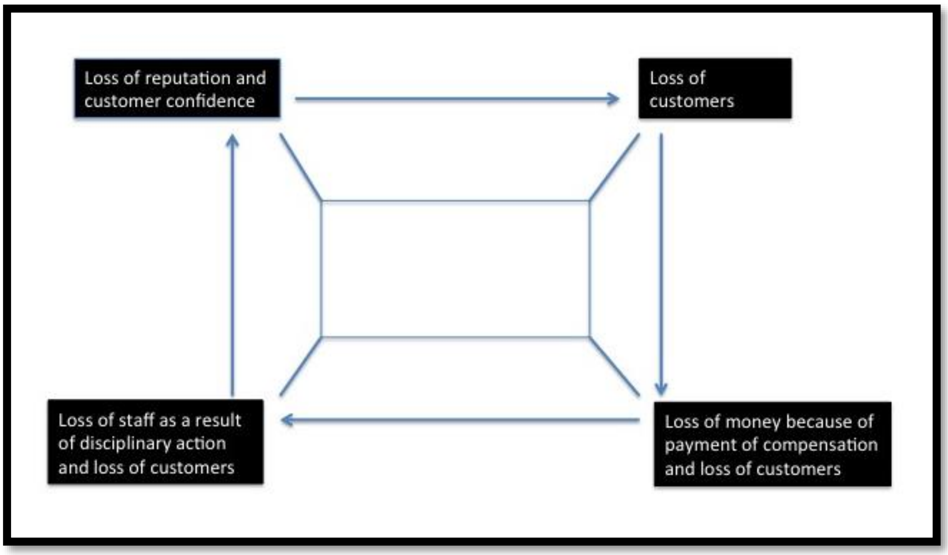


Figure 12: Negative consequences of inadequate risk management (Swarbrooke et al, 2003: 170)

[5] Exemplary damages or punitive damages are intended to reform or deter the defendant and others from engaging in conduct similar to that which formed the basis of the lawsuit.

In view of the above negative consequences of inadequate risk management it was necessary to get an understanding of actually how much value the AT operators attach to reducing risk. Adventure activities by design carry a measure of risk and issues of safety and operational standards are crucial to guide AT (SATSA, 2017: 27). There is now a much stronger onus on tour operators to balance the degree of risk (both real and perceived) with the skills of participants to ensure their safety.

The global risk management model referred to by SATSA (2017) involves (a) Preparedness, (b) Management and (c) Recovery. Respondents were asked selected aspects of this model in terms of how they practice these and what their perceptions thereof are (rated on a scale of 1 to 5 in some cases and in other cases merely to give an indication of yes/no). Table 6 summarizes these responses in terms of the three categories.

Table 6: Opinions on selected aspects of the global risk management model

Global risk management model categories						
(1) Preparedness						
Risk transfer						
	Very difficult	**Difficult**	**Neutral**	**No difficulty**	**Not difficult at all**	**Not applicable**
Cost of general public liability insurance	13.6%	15.7%	**32.2%**	**25.4%**	11.9%	1.7%
Cost of passenger liability	10.0%	13.7%	**21.7%**	**25.0%**	13.3%	16.7%
Cost of professional indemnity	6.9%	19.0%	**27.6%**	**22.4%**	17.2%	6.9%
Cost of personal accident insurance	8.5%	22.0%	**25.4%**	**23.7%**	15.3%	5.1%
Standard Operating Practices						
Legal/regulatory compliance	11.7%	**28.3%**	**25.0%**	21.7%	11.7%	1.7%
Skills training/staff induction	82% employ staff induction and 46% training.					
Safety and emergency signs and numbers	57% have this in place.					
Client orientation	44% have pre-activity written, audio or video information for clients.					
Emergency response planning						
Documented evidence of annual safety and emergency drills carried out	32% of operators have this in place					
Risk surveys						
Risk surveys carried out by independent body	22% of operators do this					
(2) Management (for more on this aspect see Tables 8,9,10)						
Implementation of Standard Operating Practices	47% have a risk management plan. 22% do risk modeling.					
Monitoring and assessment	19% indicated that they do risk assessment of activities. 16% said that they do safety audits or reviews.					
(3) Recovery						
Risk analysis	70% do their own risk analysis.					

Other management strategies and practices encountered in the AT industry are shown in Figure 13. The responses are mixed in terms of aspects generally expected of AT operators to adhere to such as incident management reporting and evacuation plans (just more than half indicated these aspects).

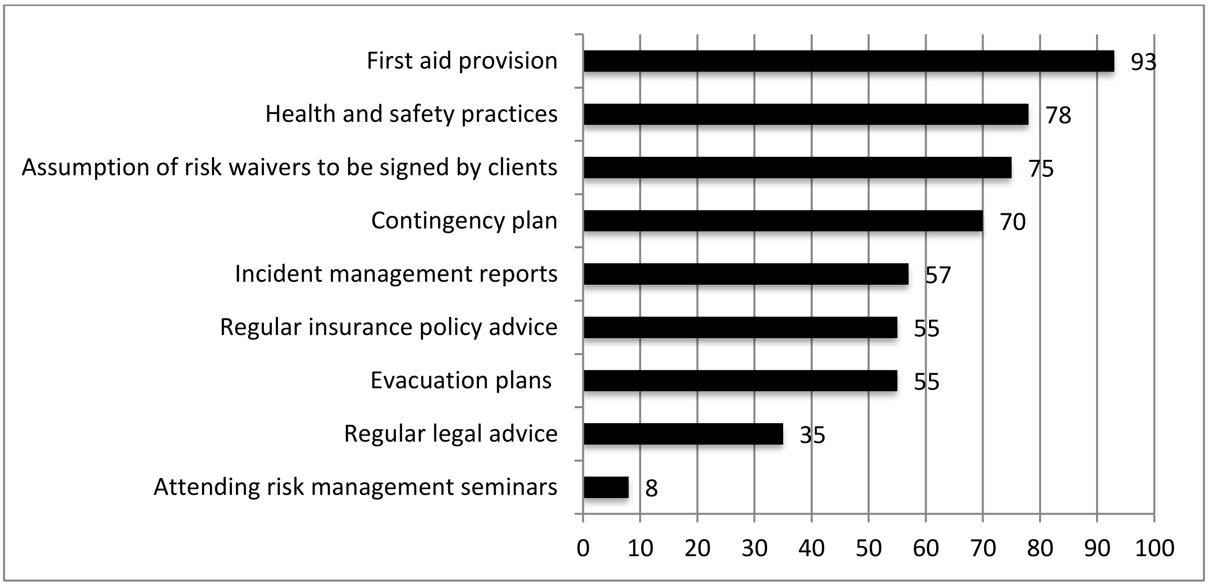


Figure 13: Management strategies and practices (percentage)

5.6 Adventure tourism regulation

As there is the potential for physical harm, regulation of the sector is also required (Clinch & Filimonau, 2016). Steps have been taken to regulate the sector, such as the adoption of the three most recent International Standards Organisation (ISO) standards regarding adventure tourism by the South African government. A thorough overview of the regulatory environment of the AT industry in South Africa has been provided by SATSA (2017) - see Appendix 1 - and will thus not be repeated here. In addition, all adventure tourism operators fall under the provisions of the:

- Occupational Health and Safety Act (No 85 of 1993)
- Broad-Based Black Economic Empowerment Act (No 53 of 2003)
- Companies Act (No 71 of 2008)
- The Consumer Protection Act (No 68 of 2008)
- The South African Tourism Act (No 3 of 2014)
- Basic Conditions of Employment Amendment Act (No 68 of 2014).

Various sub-sectors also have to comply with specific legislation such as (to name but a few):

- South African Maritime Safety Authority Act (No 5 of 1998)
- The National Environmental Management Act (No 107 of 1998) and its various iterations and amendments
- Civil Aviation Act (No 13 of 2009.

Furthermore, all operators and their employees could face criminal prosecution if found wilfully negligent. Thus, additional regulations need to be carefully crafted and a full regulation impact study undertaken with Interested and Affected Parties before implementation.

The respondents are somewhat divided on whether the AT industry in South Africa should have a regulatory body: 57% said yes and 43% said no. Selected aspects pertaining to how the respondents view certain aspects for industry policy or self-regulations in the AT industry were gauged. On a scale of 1 to 5 they were asked to score the importance of nine aspects that would typically feature in such a regulatory framework (Table 7).

Table 7: Importance of selected issues for industry regulation

How important are the following aspects for industry policy or self-regulations	**Not important at all**	**Not important**	**Neutral**	**Important**	**Extremely important**
Client/guide ratios	3.5%	1.8%	15.8%	26.3%	**52.6%**
Equipment use	1.7%	1.7%	8.6%	22.4%	**65.5%**
Staff qualifications and experience	1.7%	1.7%	3.4%	22.4%	**70.7%**
Licensing	5.3%	7.0%	10.5%	17.5%	**59.6%**
Appropriate staff training with respect to the types of activities being undertaken	1.7%	1.7%	3.4%	17.2%	**75.9%**
Registration and continuous accreditation of qualified instructors and operators	1.8%	3.5%	14.0%	15.8%	**64.9%**
An up-front external safety audit of operators' safety provisions	7.1%	8.9%	26.8%	**25.0%**	**32.1%**
Ongoing periodic external safety audits (perhaps three-yearly)	10.7%	8.9%	26.8%	**26.8%**	**26.8%**
An annual declaration that they are still complying with their safety plans	12.3%	8.8%	22.8%	**26.3%**	**29.8%**

One would assume that the fact that 53% of respondents said that there are too many operators working in the AT industry in Cape Town that are not up to standard (these opinions can however be based on unverified facts and merely based on perception), is the reason for 71% saying that there should be an adventure tourism strategy/policy for the city. Majority (73%) are also in agreement that the CoCT should not relax existing by-laws/regulations affecting AT activities in the city.

5.7 Problems experienced by AT operators

As an aim of the survey was to get an understanding of the problems AT operators experience with respect to doing business in Cape Town, respondents were awarded an opportunity to raise such problems. The findings are discussed below in two sections, one trying to get an understanding of client-related problems and two business practice-related problems.

5.7.1 Client-related problems

A list of typical client-related problems identified in the AT literature were presented to the respondents for an opinion on these factors that they may encounter in their everyday practice as adventure tour operators (Table 8). It is quite clear that the AT clients are seemingly very aware of the do's and don'ts of protocol and etiquette of AT activities (it confirms the profile of such persons in the international literature). With the exception of clients that are inexperienced or unfamiliar with the tasks to do, as well as the activity difficulty level of the challenge, all other potential problem issues are minimal. It is heartening to see that adventure tourists are respecting the natural environment where 0% seems to be doing the opposite, namely disrespecting the environment. The low level of client fitness/health and activity difficulty level/degree of challenge for clients are indicators of the extent to which the activity is commercialized, the outsourcing of the physical challenge and the skill to the guides.

Table 8: Client-related problems experienced

Factors	**No**	**Maybe/ Some-times**	**Yes**	**Not applicable**
Clients not following safety instructions	35.0%	**50.0%**	13.3%	1.7%
Clients not understanding instructions (language)	41.7%	**46.7%**	11.7%	0.0%
Horseplay/showing-off of clients	**48.3%**	41.7%	6.7%	8.3%
Low level of client fitness/health	16.9%	**55.9%**	16.9%	10.4%
Client inexperience/unfamiliarity with the task	20.3%	**32.2%**	**32.2%**	15.3%
Client taking unnecessary risks/short-cuts	**65.5%**	25.9%	1.7%	6.9%
Refuse to wear safety equipment/jackets	**81.0%**	8.6%	0.0%	10.3%
Refuse to sign undertaking	**77.6%**	8.6%	1.7%	12.1%
Alcohol over-consumption of clients	**75.0%**	11.7%	5.0%	8.3%
Clients disrespecting the natural environment	**64.4%**	28.8%	0.0%	6.8%
Activity difficulty level/degree of challenge for clients	39.7%	**46.6%**	6.9%	6.9%

5.7.2 Business practice problems

Respondents had to indicate if they experience typical business practice problems. In terms of how the CoCT's by-laws and other regulations restrict movement and certain places and during certain times, it is seen that the experiences were mixed (Table 9).

Table 9: Business practice problems experienced

Factors	**No**	**Maybe/ Some-times**	**Yes**	**Not applicable**
Travel time to and from the activity/transit takes too long	**50.8%**	25.4%	5.3%	8.5%
Municipal and other regulations restricting movement, activities	41.4%	**17.2%**	**31.0%**	10.3%
By-laws prohibiting using certain spaces, do activities at certain times, etc.	**48.3%**	15.0%	28.3%	8.3%

Although almost one third of the respondents indicated that they experience costly insurance cover are the majority saying the opposite (Table 10). The industry workforce seems to be stable where 59% indicated that they did not experience high turnover of employees. There is however a shortage of skilled staff/manpower. It is however the case that the AT operator businesses lack skilled manpower. These findings confirm the McKay (2017) study findings.

Table 10: Managerial/operational issues are experienced

Problems experienced	**Almost always the case**	**Some-times**	**Neutral**	**Hardly ever**	**Never the case**
Non availability of staff /skilled manpower	12.1%	**34.5%**	**12.1%**	12.1%	29.3%
Running pillar to post for clearance from various authorities	8.9%	**21.4%**	**26.8%**	10.7%	32.1%
High employee turnover	3.4%	13.8%	24.1%	**22.4%**	**36.2%**
Costly insurance cover	**27.3%**	16.4%	25.5%	18.2%	12.7%
Natural factors (bad weather)	19.0%	**58.6%**	15.5%	6.9%	0.0%

Seasonality is a major issues for AT operators where 59% said that they sometimes experience problems as a result of weather conditions and another 19% said they always experience problems (Table 10). A total of 18 of out of 60 have indicated that this is their biggest problem they experience doing business in Cape Town. In Figure 14 it is seen that the worst months for doing business are June, July and August although April, May and September are also impacting hugely on their businesses. This is not unsurprising due to the winter weather that affects and prevents outdoor activities from taking place.

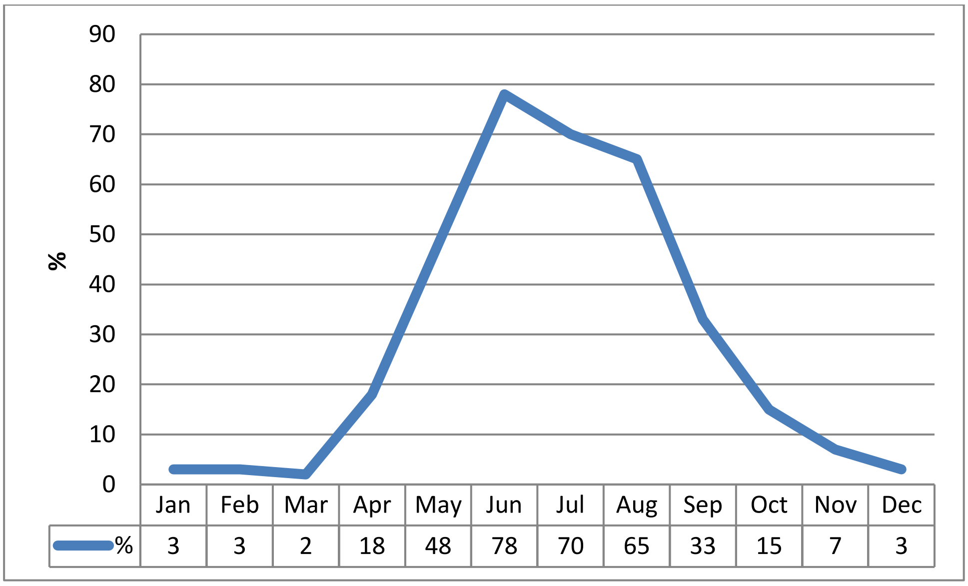


Figure 14: Worst months for doing business (percentage)

Respondents were asked to provide what they consider to be problems they experience running an AT business in Cape Town. Many indicated they do not experience any problems, such as one operator who stated “Can’t say I have any problems. Have been doing this for years and sorted out all possible issues” were there some who did speak their mind.” Many, however, complained about the weather and seasonality - “seasonality means that income is not always guaranteed.” Yet there was a range of issues other than the weather and lack of clients and they are provided verbatim below sorted according to the four overarching problematic themes of regulation, client-related, operational and infrastructure-related problems (56 respondents highlighted a problem of which 19 complained about the weather). Figure 15 shows the localities where AT activities would typically take place – along the mountain range, beaches, slipways etc. Figure 16 shows the localities of the problems that can be spatially identified from the bullets below.

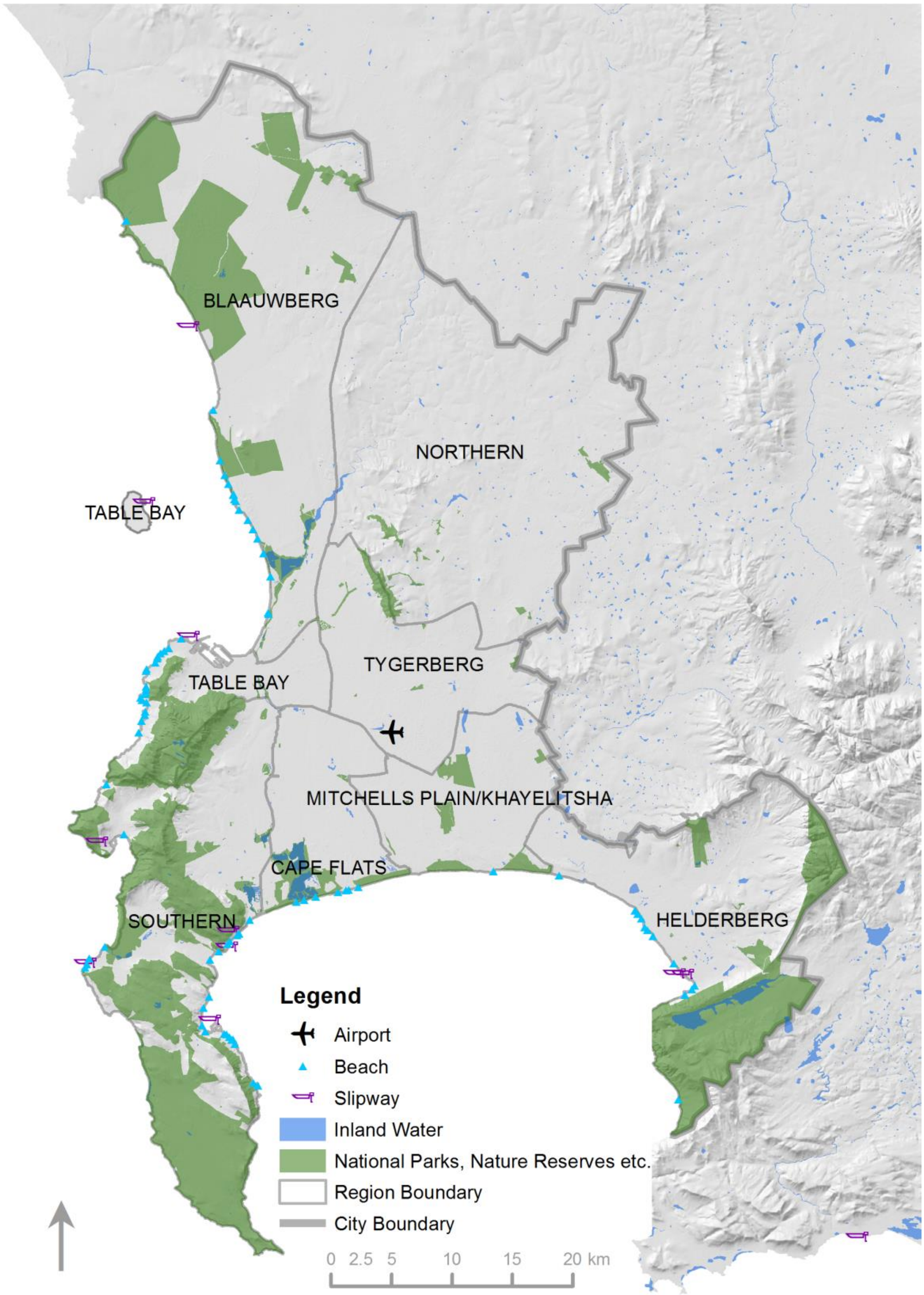


Figure 15: Map of main AT activity spaces

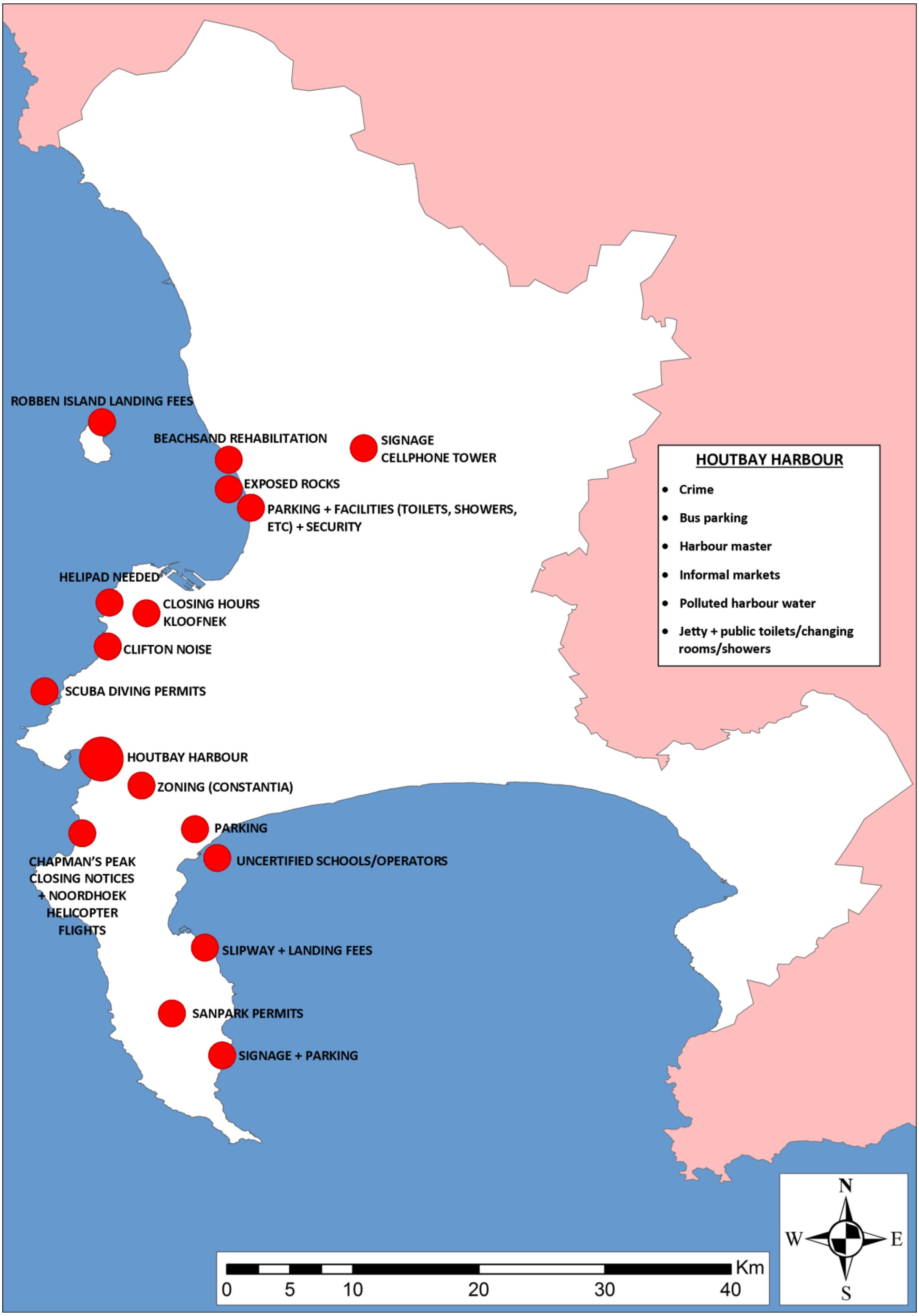


Figure 16: Spatial location of selected space-related problem areas

Regulation and policy issues:

- "Fly by night" operators Lack of qualified guides.
- Competition from unqualified guides and 'back-pocket operators' who offer cheap prices and limited client back-up support.
- Unlicensed operators, tour operators, undercutting rates, delivering bad service.
- Undercutting of rates by new unscrupulous operators with no experience or qualification.
- SA should be a world adventure hub but is not due to the authorities not seeing the potential in adventure.
- Competition under cutting prices to get the business.
- Complying with all the regulations (most notably operating licence permits).
- Currently we see an increase of uncertified schools opening up on the beach who do not have overheads.
- Gaining permits for venues from both the city and SANPARKS. It is time consuming and frustrating and needs a lead time of many.

- Niche adventure markets get little to no coverage/help from tourism board/City of Cape Town as they do not understand the market needs.
- Red tape - no help after 17 years - lots of talk but no action.
- Red tape from government - it limits what we can do as operators in the industry.
- Red tape from government in permit acquisition.
- Landings in Cape Town are very restricted, leaving us few places to land helicopters or paying a massive amount of money to land immediately.
- Motorbikes belonging to a certain club (name withheld) needs regulating.
- Lack of efficiency by Marine and Coastal Management.
- Noordhoek beach helicopter flights are too low and this scares the horses.
- The cost of getting guides legally compliant (i.e. NQF assessed and registered) is high and the process is unnecessarily complicated. Fees charged by Cape Nature are proportionately extremely high and this impacts on our ability to offer our trips at a reasonable price.
- Longer toilet opening time at the Kloof Nek parking area.
- Payment is in the way of scuba diving permits.
- Constantia - We battle to get the correct zoning (the landlord) in order for us to put permanent structures at our site. We have had to therefore resort to using portable toilets

and offices.

- Our activities are very low impact, in small groups and take place on the water, using public access. Very little hard infrastructure is needed. Public toilets are always needed and approval for launch and landing places would be great.
- A review of permit requirements for road cycling tours deemed as "sporting events".
- To allow more than 2 companies to operate seal snorkelling would be reckless.
- Snorkelling/diving at seal islands not regulated and affects the “seal life”. Four seals were shot recently.
- Training [at harbour/s] required to educate people about the seals and why not to feed them.
- Permit system must be upgraded and become online – why do we have to buy fishing permits at the post office?
- SANPARKS Permits – prices are high and system needs upgrade.
- SANPARKS – permits are expensive and then facilities are not up to standard. Broken toilets, staff/cleaners sleeping on the grass. Dead animals are not taken away.
- SANPARKS - Flower arrangements at food tables for (upmarket) clients are not allowed in certain areas. Similarly, gazebos for food tables are seen as temporary structures and not allowed without special permits. Only umbrellas are allowed.
- SANPARKS – Well known catering companies (names withheld) do a lot of catering for international tour groups/guests who are doing adventure tourism in Cape Town and they are experiencing a lot of problems in terms of what they may do and not do.
- Transport Board (a nightmare) - always a difficult requirement when you go to lodge an application. The national transport department is even worse.

Client-related issues:

- Guests do not read their information packs, and often are misinformed even though information packs have been emailed numerous times and online information also available.
- Tourists at times do not speak English at all.
- Language barriers with clients.
- Clients who book and don't arrive.
- Customers do not adhere to conditions of use.
- People arriving late and no-shows due to traffic.

Operational issues:

- Activity extremely dependent on weather. If conditions are not perfect then the activity cannot take place.
- Bad reception for phones. Google maps take tourists to wrong place.
- Competition from other activities (too much to do) in Cape Town.
- Dealing with government officials.
- Finding clients/marketing.
- Keeping up with changes in industry.
- Traffic congestion - it now takes much longer to run our tours and impacts on how many activities we can offer our clients in a day.

- Harbour authorities not accepting tourism as a vital part of the economic growth, employment and income producing product in SA. They are adamant that Hout Bay Harbour is a fishing harbour and not a tourist harbour.
- Harbour Master in Hout Bay believes tourism is not important.
- Marketing our products, especially to international tourists. From industry point of view - guide training and qualifications.
- Marketing.
- Safety in adverse weather.
- Networking, finding tour companies to join up is very difficult.
- Qualified and Experienced Staff.
- Promoting to the public to change perceptions that gyrocropter is not safe.
- Only the wealthy can afford so small number of clients.
- Finding qualified, passionate and energetic guides Risk Management - Indemnity, Insurance.
- Lack of cooperation between operators.
- Qualified experienced skydiving instructors.
- Help new operators to start and make the process easy.
- From local residents at Clifton. A very subjective issue with locals always complaining and causing problems for charter boat operators.
- Finding qualified, passionate and energetic guides Risk Management - Indemnity, Insurance.

With the exception of a couple of respondents all others indicated that they never have any problems with other AT operators: “When encountering a group from our competitor we treat the group as if it we another tour we are running and strive to treat the group with courtesy and respect. We keep out the way as far as possible without being awkward.”

Infrastructure:

- Routes for road biking tours. Recognition by authorities of road bike tourism. Ancillary services such as catering/picnics for high value clients. Security on mountain bike and mountain trails in the TMNP.
- Blouberg - Parking for tour operator vehicles. We often arrive at the beach with a full bus of clients and cannot find parking. Not great when you are on a strict time schedule.
- Traffic and dedicated parking for motorcycles.
- More Cycle lanes in city.
- Traffic. Parking at the beaches. Exposed rocks at Blouberg Big Bay beach. Security of gear left in vehicle and trailers.
- Our main issue is security for parked vehicles - very at risk for thieves.
- Transporting clients from city bowl to Simon’s Town (traffic congestions).
- Ablutions and shower facilities on the beachfront.
- Access to good flying sites and landing areas are becoming problematic over time due to development.
- I am losing business due to visitors getting lost.
- Safety for women running in the trails/mountain, and in the downtown city centre.

- Millers Point slipway and toilets need upgrade. Helipad at Atlantic seaboard needed.
- More public toilets at slipways, security at popular diving sites.
- The amount of sand that has moved away at Big Bay Beach has affected the beach immensely. Re-sanding the beach because the rocks are exposed and cause injuries.
- Blouberg - toilets, showers, safety and security parking and storage signage warning general public of activity taking place (e.g. kite surfing).
- Cape of Good Hope – parking problem. Have a circular route for busses/cars to move around. One point to take photos, which is creating a backlog if big groups are there.
- Access to good flying sites and landing areas are becoming problematic over time due to development.

A number of issues were raised against the Hout Bay Harbour –

- Currently our biggest hurdle in Hout Bay is the Harbour Master.
- Harbour officials do not think that tourism is viable - The Seal Snorkelling viewing boats along with us and the scuba diving companies are trying to show that tourism is a big part of Hout Bay.
- Crime - there is no security in the harbour. Harbour users pay harbour fee but there is no service Water wastage no maintenance...navigation lights at the entrances of the harbour as they were stolen. The slipway is in very bad condition and needs repair.
- Pollution in water and harbour. Security in the harbour. Sanitation. Public toilets.
- Hout Bay harbour toilets/slipways/parking/safety and security/approved landing places needs upgrading.
- Jetty and public toilets/change rooms and showers.
- Hout Bay harbour slipway needs upgrade, security improvement and clean up of harbour in general.
- Public toilets at HB harbour. Designated parking for coach busses.
- We need security on the step way to harbour (Hout Bay) to prevent kids from swimming there - it is extremely dangerous. Was asked by harbour master to vacate our gazebo from where we were working so now had to rent another place.
- The daily pop-up informal markets at Hout Bay Harbour is in front of all the different boat launching area and is blocking their entrances and clear view for arrival guests/tourist. Companies with smaller boats loose possible clientele.
- Areas for scuba diving operations and Seal Snorkelling to set up and welcome clients are needed. We have now bought a house down the road to run from as the Harbour Master has told all scuba and snorkelling operations to vacate the Harbour by the 1st June.
- Security for the tourists as many get robbed and mugged in Hout Bay, walking from one end of the harbour to the other to get to the market.
- Security to also stop the kids swimming in the harbour slipway is also an issue as it is very dangerous.
- Bus parking organisation, possibly more space.

At the time of completing this research project notification was received from the deputy mayor's office regarding the intent of the CoCT to promulgate by-laws to govern all the harbours in Cape Town. This action is indeed positive news for adventure tour operators whom have been experiencing major problems in the harbours and having to deal with inept government officials of DPW and DAFF. See Box 5 for the media statement in this regard.

Box 5: Media statement regarding the CoCT by-law for harbours

12 JUNE 2017 - STATEMENT BY THE CITY'S EXECUTIVE DEPUTY MAYOR, ALDERMAN IAN NEILSON

City publishes draft Harbour By-law for public comment

The City of Cape Town has today made its draft Harbour By-law available for public comment. This By-law proposes to reverse the long-running, systemic mismanagement of the city's harbours under the National Departments of Agriculture, Forestry and Fisheries (DAFF), and Public Works (DPW).

The draft Harbour By-law was drawn up in terms of the constitutional mandate of municipalities to administer harbours within their jurisdiction. This would enable the City to regulate how the National DPW, as owner of the harbours, manages them.

The City has been engaging with representatives of both the DAFF and the DPW for several years with a view to establishing a cooperative basis for the proper administration of the harbours within the City's jurisdiction. These include the Hout Bay, Kalk Bay, Murrays' Bay, Granger Bay, and Gordon's Bay Harbours.

All these efforts have come to nought. Despite trying to negotiate a memorandum of understanding with the two departments, the DAFF refused to participate and the DPW withdrew after initial engagements, despite having arrived at a draft memorandum of understanding and an implementation protocol under Operation Phakisa.

This has left the City no choice but to forge ahead with the proposed By-law. Our harbours cannot continue to be neglected and mismanaged, falling ever further into disrepair. Their dilapidated and dysfunctional state has a serious impact on those who use them, in particular the workers and communities who depend on the harbours for their livelihood. Lack of professional management and maintenance has resulted in the serious degradation of these public assets, an increase in crime, and a failure to develop their economic potential.

The DPW has failed to maintain these assets as required in terms of the Government Immoveable Asset Management Act. The Hout Bay and Kalk Bay Harbours are currently managed by the DAFF under the purported authority that they have been declared fishing harbours under the Marine Living Resources Act of 1998, and accordingly authorised by the Control over and the Management of Fishing Harbours Regulations.

The City has taken senior counsel's opinion on the constitutionality of this assertion, and that opinion concludes that the assertion of authority, and the regulations that purportedly authorise this, did not survive the repeal of the Sea Fisheries Act. Alternatively, even if they did, this would be unconstitutional as it encroaches on the constitutional mandate of municipalities to manage harbours (other than national ports) within their jurisdiction.

In view of the failure to establish a cooperative arrangement with the two departments, the City intends to take over their administration by means of a Harbour By-law. This will authorise the City to administer these harbours, to regulate harbour and other municipal matters in the harbour precincts, and to set standards for the repair and maintenance of the harbours to be implemented by the DPW.

The City notified the DAFF and the DPW of this intent, and forwarded them a copy of the draft By-law for their consideration on 29 May 2017. The Minister of Agriculture, Forestry and Fisheries was also invited to withdraw or amend the contested regulations in order to avoid an intergovernmental dispute. To date, the City has received no response from either department.

Nevertheless, the City will not be deterred in its efforts to finalise and publish the By-law. The sooner the Harbour By-law can be enacted, the sooner we can begin to reverse the rot in our harbours.

Interested parties can view the Draft Harbour By-law here and submit their comments before 8 July 2017.

End
Issued by: Media Office, City of Cape Town
Media enquiries: Alderman Ian Neilson, Executive Deputy Mayor, City of Cape Town, Tel: 021 400 1306 or Cell: 083 306 6730, Email: Ian.Neilson@capetown.gov.za (please always copy media.account@capetown.gov.za)

5.7.3 Government liaisons

Many operators deal with some government at some stage in a given year. Their interactions are with the following entities:

- Cape Nature law enforcement
- Cape Nature parks board
- Cape Nature (Kogelenberg nature reserve)
- Catchment management
- Department of Agriculture, forestry and fisheries (DAFF)
- DEAT
- SANPARKS and TMNP
- Provincial Department of Economic Development and Tourism
- Department of Public Works
- CoCT water and electricity
- CoCT- vehicle licence
- CoCT – sports and recreation
- CoCT- water department
- Liquor Board
- Marine coastal management
- SA Maritime Safety Authority
- SAMSA
- SAPS (licensing)
- Transport Board

Some comment on their dealings with these as follows:

- CoCT's disaster risk management - they approve our landings they are amazing and very helpful.
- Marine Coastal Management - They issue our permit we supply log books of our trips for research purposes
- DAFF - Suppose to have a forum meeting every 3 months which may have ceased for a year.
- Department Environmental Affairs and Tourism. Every two years to renew guiding permit.
- Cape Town municipality - try to identify need sites for parks and get the buy-in of municipality and community.

5.7.4 Suggestions made by AT operators to authorities

Although the operators are not really in a position to provide solutions to these problems did some made the following suggestions to government (local, provincial and national) in terms of assisting the adventure tourism sector:

- Nationally: Market Access (the SME market access programme at the Indaba was excellent! Maybe WESGRO can do something similar.
- An attempt has to be made to spread the pressure away from the very overcrowded 'traditional' tourism offerings to AT.
- Customs should allow sport equipment to come in without duties where specific equipment is only available from overseas.
- Getting guests to Simon's Town by Uber or taxi is very expensive so the traffic/transport problem city-wide has to be addressed.
- Host a City of Cape Town AT Indaba.
- Build more cycle lanes and allow cyclists in public walk ways e.g. The promenade.
- Regarding the closing of Chapman's peak at certain times - communication re this must be made well in advance as it impacts travel times and scheduled activities.
- CoCT to regulate pop-up stands/businesses on beaches without permits.
- Facilitate conversation between role players and potential role players with the aim of developing the market in a holistic and future focused way. Facilitate exposure to city resources that could translate into future entrepreneurial activities.
- Fund the formation of a professional body for adventure operators. This must include the outdoor adventure education (school camps). Assist with professionalising the industry for operators and guides alike.
- Funding or loan option for individuals to become qualified guides/coaches.
- Dedicated tour bus parking at beaches.
- Listen to suggest. Have an open mind to new concepts. Make sure they have experts on hand (small business experience and AT experience) to assist when decisions/permissions need to be made. Assist operators if certain landlords are

being restrictive.

- Lowering the cost of landing fees at Robben Island and Cape Point making it affordable for clients.
- Making it easier for us to operate in more of the beautiful spaces surrounding Cape Town and allowing permits for us separate to private adventurers.
- Marketing, advertising, give start up and assistance grants. Assist with promo items.
- SANPARKS - especially Cape Point - needs to review its infrastructure regarding entry (always congested in season), serviced toilets at strategic points, especially at Cape of Good Hope sign area.
- Structured operating regulations are to be applied equally across the industry, including monitoring of basic requirements such as RTP on vehicles used for client transfers, recognition of the industry.
- To be more accommodating to facilitate communication between SAN parks and other conservation bodies and adventure tourism.
- To use state land for adventures - we have a very low environmental impact regarding structures. We assist in job creation in the area as well as pay favourable rent for the property.
- Turnaround time for road permits to be quicker and run smoother.
- We would like them to extend our area of operation.
- Regulation of surf schools at the beaches. I.e. those without qualified instructors should not be able to run a surf school.
- Collaboration of competitors and industry organisations.
- Awareness in the market of my product.
- Authorities to support tourism.
- A collective advertising body. CTT need to identify AT as a serious sector and promote it as such.
- A body or committee of operators that can convene and discuss issues.
- Allowing me to have another area of operation to do our shark cage diving.
- Better awareness of running tours.
- Better communication and willingness to acknowledge tourism in Hout Bay and change in attitude and enhance tourism authorities' role in Hout Bay harbour.
- Cut red tape, better documented investment of what we pay for and take a real interest in what operators have to say.
- Have a tourism body that accommodates tourism admin such as assisting with bylaw awareness, etc.
- Identify niche adventure markets and get professionals (in that field) to help market them (relevant, modern photos and articles). Advertise the adventure market to those with income as the younger 'adventure tourism' market are not the ones that spend the most money per trip.
- Marketing during slow months. CTT to promote alternative tourism as a whole.
- Sand replacement programme needed at Big Bay beach urgently.
- Dedicated tour bus parking at key beaches.
- Organised permit system allowing for catering on trips, recognition of road

cycling tours, bike lanes on roads (Cape Point Nature Reserve! What are we paying a supplementary cycling permit for???), more pro-active security on trails.

- Someone from CoCT to visit/speak to harbour masters to explain how important tourism is.
- The authorities need to enforce guiding regulations and the correct qualification of adventure guides. SA needs to be actively marketed as an adventure destination with amazing terrain and suitably qualified and professional guides.
- The CoCT should perform random checks to see if they are affiliated/accredited. CoCT should register all operators and those not registered should be fined.

Lastly, one operator was very adamant by stating “contact me to say that his feedback has been taken seriously and into account and how issues will be addressed” (name and number withheld in report), one said knock down the pavillion at Muizenberg, and another cleverly suggested for CoCT staff to understand the AT business better they should “send the department of tourism staff for teambuilding by doing AT activities.”

6. Conclusion

Greater Cape Town is well positioned to build on its unique and beautiful physical geography, well developed tourism sector and substantial adventure tourism industry to become *the* destination of choice for adventure seekers in Southern Africa. Some respondents in the survey have stated that it should be marketed as the "AT hub of the country".

Policy makers and industry players have to support the sector collectively in a number of ways. Firstly, assist operators to build a database of incidents such as injuries and accidents. Secondly, implement, where necessary, well-crafted sector specific regulations. Thirdly, help operators reduce their water, waste and energy footprint. Fourthly, assist with marketing by having a retail outlet at key locations (such as the V&A Waterfront) for the sale of adventure products, work with inbound operators to sell packaged adventure tours, and team up with SATSA to market the sector in general. Fifthly, help operators to negotiate good insurance product rates. Lastly, fill the product gap with respect to bungee jumping, urban adventure, indoor adventure and soft adventure products by working with currently employed adventure guides to establish SMMES in these specific adventure types. In order to do all the above a uniform AT body has to be created for Cape Town in collaboration with CTT and CoCT Tourism Development. A call was made by a number of respondents that there should be a uniform AT body created in Cape Town: one respondent said "CTT should facilitate networking opportunities of AT industry so that they can meet and share ideas at least once a year."

Cape Town is a specific example of how the nature of AT can change from season to season. This means that the marketers (CTT) have to modify the marketing mix several times a year to meet the needs of different market segments (Swarbrooke et al., 2003). Getting a better understanding of which AT activities are viable to be marketed during the typical slow season of winter is crucial.

Nationally, in terms of adventure, Greater Cape Town faces competition from Johannesburg and KwaZulu-Natal. In this regard it is important that Greater Cape Town encourage more local residents to undertake an adventure in their own city. Internationally; other SADC countries, especially Mauritius, are also starting to acknowledge the economic importance of adventure tourism (Bezuidenhout & Grater, 2016). To compete, Greater Cape Town needs to consider adventure package holidays. Policy makers can also support the industry by assisting the sector to develop appropriate adventure products (activity, attraction or experience) tailored to suit specific tourist needs (Robinson & Novelli, 2005; Swart, 2010).

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Appendix 1: Regulatory environment of the AT in South Africa. Source: SATSA (2017: 21-26)

8.2.2 Regulatory environment

The main regulatory authorities for adventure tourism in South Africa are:

8.2.2.1. National Departments

- Department of Environmental Affairs
- National Department of Tourism
- Department of Transport
- Department of Agriculture, Forestry and Fisheries
- Department of Sport and Recreation
- South African Police Service (SAPS)
- South African National Parks (SANParks)
- South African Maritime Safety Authority (SAMSA)
- South African Astronomical Observatory

8.2.2.2. National Qualification Authorities

- Culture, Arts, Hospitality, Sport Sector Education and Training Authority (CATHSSETA)
- Transport Education Training Authority (TETA)
- South African Qualifications Authority (SAQA)
- National Qualifications Framework (NQF)
- South African Civil Aviation Authority (CAA)
- South African Sports Confederation and Olympic Committee (SASCOC)
- Equestrian Qualifications Authority of South Africa (EQASA)
- National Association of Underwater Instructors
- Professional Firearms Trainers Council
- Equestrian Qualifications Authority of Southern Africa

8.2.2.3. Other Associations and Representative Bodies

- Motorsport South Africa
- National Off Road Workgroup (NOW)
- SA Off-Road Council
- African Off Road Academy
- Off Road Guide and Tour Operator Association
- Commercial Balloon Operators Association of South Africa
- The Balloon and Airship Federation of South Africa
- Recreation Aviation South Africa (RASA)
- SA Paragliding and Hanggliding Association (SAHPA)
- Aero Club of South Africa
- Parachute Association of South Africa (PASA)
- International Kiteboarding Organisation
- SA Microlight Association
- Helicopter Association of South Africa
- South African Equestrian Foundation
- Birdlife South Africa
- Wildlife and Environmental Society of South Africa
- Federation of Southern African Fly Fishers
- South African Bass Angling Association
- South African Shore Anglers Association
- South African Deep Sea Angling Association
- South African Underwater Fishing Federation
- Marine Industry Association of South Africa

- Carriage Driving Association of South Africa
- Professional Hunters Association of South Africa
- Cycling South Africa
- Mountain Biking South Africa
- SA Skateboarding Federation
- Sport and Recreation South Africa
- The South African Dragon Boat Association
- Speleological Exploration Club
- Canoeing South Africa
- African Paddling Association
- SA Long Boarding Association
- International Rafting Federation (IRF)
- African Sea Kayak Society
- Stand Up Surfing South Africa
- South African Water Ski Federation
- SA Skyrunning Association
- SA National Archery Association
- International Field Archery Association (IFAA)
- Clay Target Shooting Association of South Africa
- Safety and Security Sectorial Education Training Authority (SASSETA)
- Snow Sports South Africa
- Surfing South Africa
- Provincial Tourist Guide Associations
- Equestrian Tourism Association

Municipal authorities in the areas where adventure activities take place, have a major role to play due to the local by-laws that are applied at the municipal level.
The capacity of the above authorities to regulate and effectively monitor the regulations is unclear.

As all adventure tourism operators are considered tour operators they also fall under the provisions of the:
 _Occupational Health and Safety Act (No 85 of 1993)
 _Broad-Based Black Economic Empowerment Act (No 53 of 2003)
 _Companies Act (No 71 of 2008)
 _Consumer Protection Act (No 68 of 2008)
 _South African Tourism Act (No 3 of 2014)
 _Basic Conditions of Employment Amendment Act (No 68 of 2014).

In addition, various sub-sectors would also have to comply with specific legislation such as the:
 _South African Maritime Safety Authority Act (No 5 of 1998)
 _The National Environmental Management Act (No 107 of 1998) and its various iterations and amendments
 _Civil Aviation Act (No 13 of 2009)

Furthermore, all operators and their employees could face criminal prosecution if found wilful negligent such that they caused serious harm, injury or death to their clients.

8.2.3. Summary of Regulations By Sub-Sector

For many activities there are no regulations related to the specific activity. However for areas and activities where government has a strong interest and presence, such as for example the gun control safety, the environment, animal and nature conservation, rivers, oceans and dams, strong regulations exist. These regulations may not however be directly related to the activity itself, but rather to the area or environment within which the activity occurs.

Where some regulations do not exist, the study provides an indication of the regulations that should generally be observed. In most instances regulations are related to how and where the adventure operators should operate and how they should behave in such environments, and not necessarily specific regulations related to their adventure activity. Additional regulations for each activity would need to be considered against the risk of over regulation.

Certain regulations are not mentioned because they are not regulations for the tourism operator, but rather regulations for the construction and design of the tourism product or activity, such as for example Zip Lines, Canopy Tours, Aerial Cableways etc.

The main regulations for the adventure tourism subsectors defined have been identified as:

8.2.3.1. Aerial Flight

- Civil Aviation Act 13 of 2009

8.2.3.2. Aerial Non Flight

- National Environmental Management Act No 107 of 1998
- National Environmental Protected Areas Act No 57 of 2003.

8.2.3.3. Animal Encounters

- National Environmental Management Biodiversity Act No 10 of 2004
- National Environmental Management Act No 107 of 1998
- National Environmental Protected Areas Act No 57 of 2003
- Marine Living Resources Act No 18 of 1998. Game Capture Act 101 of 1965
- Firearms Control Act 2000. SABS SANS 10353 of 2009
- Draft Regulations for Tourist Guiding

8.2.3.4. Bicycle

- National Road Traffic Act. Regulation 311: Riding on Pedal Cycles
- National Environmental Protected Areas Act No 57 of 2003
- National Forests Act No 84 of 1998
- National Environmental Management Act No 107 of 1998

8.2.3.5. Boarding

- No specific regulations
- Skate boarding should observe the National Road Traffic Act.

8.2.3.6. Boating

- South African Maritime Safety Authority
- Merchant Shipping Act (National Small Vessel Safety) Regulations 2007
- SANParks Marine Notice No 13 of 2006

8.2.3.7. Canyoneering

- No specific regulations
- National Heritage Act
- National Environmental Protected Areas Act No 57 of 2003
- National Environmental Management Act No 107 of 1998
- Draft Regulations for Tourist Guiding

8.2.3.8. Caving
- No specific regulations
- National Heritage Act
- National Environmental Protected Areas Act No 57 of 2003
- National Environmental Management Act No 107 of 1998
- Draft Regulations for Tourist Guiding
8.2.3.9. Circus
- No regulation
8.2.3.10. Diving
- Marine Living Resources Act No 18 of 1998
- National Environmental Management Act No 107 of 1998
- Integrated Coastal Management Act No 24 of 2008
- Department of Labour Occupational Health and Safety Regulations
- National Environmental Management Biodiversity Act No 10 of 2004 (2014 amendments)
- SAMSA Marine Notices
8.2.3.11. Fishing
- The Marine Living Resources Act (Act No. 18 of 1998)
- South African Maritime Safety Authority
- Merchant Shipping Act (National Small Vessel Safety) Regulations 2007
- SANParks Marine Notice No 13 of 2006
8.2.3.12. Go Karts
- No specific regulations but administered under the provisions of the General Competition of Motorsport SA
8.2.3.13. Hover Craft
- National Environmental Management Biodiversity Act No 10 of 2004 (2014 amendments)
- National Environmental Protected Areas Act No 57 of 2003
- National Environmental Management Act No 107 of 1998
8.2.3.14. Jumping
- No regulations, only specific safety guidelines
8.2.3.15. Motorbike
- National Road Traffic
- National Environmental Protected Areas Act No 57 of 2003
- National Environmental Management Act No 107 of 1998 (for 4x4, Beach Buggies, Scootours and Quad Bikes)
8.2.3.16. Motorcar
- National Road Traffic
- National Environmental Protected Areas Act No 57 of 2003
- National Environmental Management Act No 107 of 1998 (for 4x4, Beach Buggies, Scootours and Quad Bikes)
8.2.3.17. Mountaineering
- No specific regulations related to climbing
- National Environmental Protected Areas Act No 57 of 2003
- National Environmental Management Act No 107 of 1998
- SA National Parks Safety Guidelines
- Draft Regulations for Tourist Guiding
8.2.3.18. Outdoor Education
- No regulations
8.2.3.19. Paddling
- SAMSA Marine Notice No 13 of 2006
- SAMSA Marine Notice No 21 of 2014

- National Environmental Protected Areas Act No 57 of 2003
- National Environmental Management Act No 107 of 1998
- SANParks Safety Guidelines
- Draft Regulations for Tourist Guiding

8.2.3.20. Running
- National Road Safety Act
- National Environmental Management Act No 107 of 1998
- SANParks Safety Guidelines (trail running)

8.2.3.21. Sailing
- Merchant Shipping Act (National Small Vessel Safety) Regulations 2007
- National Environmental Management Act No 107 of 1998
- SAMSA Marine Notice No 13 of 2006

8.2.3.22. Segway
- No regulations
- National Road Traffic Act

8.2.3.23. Shooting
- Firearms Control Act No 60 of 2000
- SABS SANS 10353 of 2009
- Dangerous Weapons Act No 15 of 2013
- National Environmental Management Biodiversity Act No 10 of 2004 (2014 amendments)

8.2.3.24. Skiing
- National Environmental Protected Areas Act No 57 of 2003
- National Environmental Management Act No 107 of 1998
- SA National Parks Safety Guidelines

8.2.3.25. Snorkelling
- Department of Labour Occupational Health and Safety Diving Regulations
- National Environmental Protected Areas Act No 57 of 2003
- National Environmental Management Act No 107 of 1998
- SA National Parks Safety Guidelines
- Draft Regulations for Tourist Guiding

8.2.3.26. Stargazing
- Astronomy Geographic Advantage Act No 21 of 2007

8.2.3.27. Tobogganing
- No regulations currently
- National Environmental Management Act No 107 of 1998

8.2.3.28. Walking
- National Heritage Act
- National Environmental Protected Areas Act No 57 of 2003
- National Environmental Management Act No 107 of 1998
- National Forests Act No 84 of 1998
- SANParks Safety Guidelines
- Draft Regulations for Tourist Guiding

8.2.3.29. Zorbing
- No regulations

Most activities where regulations do not exist, do however have strong safety and operational standards in place which are operator specific.
Furthermore where regulations do not exist, there is generally a national association that has been endorsed by government or the relevant safety authority as being a representative body for the industry. This study has identified 32 areas where direct regulations do not exist.

National associations exist for only 12 of these areas. Of the 32 areas identified, 18 (almost half) have a medium to high level of risk to the person undertaking the activity. 13 of the 18 do not have national associations in safe to regulate activities or membership.

Appendix 2: Example of questionnaire

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

TOURISM DEPARTMENT

Pauline van der Spuy
Head : Strategic Tourism Infrastructure Development

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To the Adventure Tourism Industry

ADVENTURE TOURISM SURVEY

Good Day

The City of Cape Town has commissioned Tourism and Urban Research Unit to conduct a survey on the adventure tourism sector in the City of Cape Town. We will appreciate it if you can assist in completing a questionnaire. The details of the survey are included below and your assistance will be greatly appreciated.

All information will be treated as strictly confidential. No information will be published individually. All information will only be used in aggregate. You are welcome to contact us should you need more information.

Question: What is this survey all about?
Answer: The City of Cape Town is conducting a study on the adventure sector and any problems they might experience in undertaking their activities.

Question: How long will the survey take?
Answer: The survey consists of 22 questions and should not take longer than 20 minutes.

Question: How will this information be used?
Answer: The survey does not require your name and contact details or that of the tourism enterprise, but a fair reflection of your business and the problems and issues you experience when activities take place within the Cape Town municipal area. Information will mainly be used in aggregate.

Question: Why should I complete this questionnaire?
Answer: The results of this research in the adventure sector can be used to demonstrate the importance of adventure tourism, potential growth and assist the sector in addressing specific problems and issues.

Kind regards

Pauline van der Spuy
Head : Strategic Tourism Infrastructure Development
Tourism Department
City of Cape Town

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Adventure tour operators survey – 2017

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

1. ABOUT YOUR COMPANY

1.1 How long has this company been in operation? ....years

1.2 How many people are employed on a full-time basis in the company? ....

1.3 How many people are employed on a part-time basis/seasonal basis annually?..........

1.4 If you can estimate, which percentage of your clients are from where? (Percentages should add up to 100%):

Your clients are:	**%**
Cape Town residents	
Elsewhere in the Western Cape province	
Elsewhere in the country	
International	
Total	100%

1.5 Which months are your **slowest months** for doing business? (encircle as many relevant)

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

1.6 Which (professional) organisations are you affiliated to/member of?

....

....

....

1.7 What is the value to you to be part of the above organisation(s)

....

....

....

1.8 Which of the following adventure tourism activities do you offer in Cape Town?

4 x4		Foot safaris		Power boating	
Abseiling		Forest walks		Quad bike tours	
Acrobranch		Geckoing/water tubing		Quad Biking	
Action shooting		Go karting		Rap jumping	
Aerial boardwalk		Gorge and bridge swinging		Rock climbing	
Aerial cable trail		Gyrocopter		Running tours	
Aerobatic flights		Hanggliding		Sailing (charters)	
Aquarium diving		Helicopter flights		Sailing (dinghies)	
Archery		Hiking (serious, very serious rugged terrain)		Sailing (multi-hulls)	
Assisted camping (where there are guides to help you camp)		Hiking (walking on good path, easy terrain)		Sailing (yachting)	
Bakkie skiing		Horse riding		Sandboarding	
Below the surface sightseeing (tunnel tours)		Hot air ballooning		Scenic flights	
Bi plane rides		Huey helicopter rides		Scooter tours	
Blokart sailing		Jet boating		Sea kayaking	
Boat based whale watching		Jet skiing		Shark Cage Diving	
Boat charters		Karting		Sidecar tours	
Boat trips (recreational)		Kayaking		Skydiving	
Bouldering		Kite boarding		Snorkeling with seals	
Bungee jumping (urban and nature)		Kitesurfing		Snorkelling	
Cable sliding		Kloofing		Stand Up Paddleboarding	
Camel rides		Land sailing		Surfing	
Canoeing		Marine mammal swimming		Surfski paddling	
Canopy tours		Microlight passenger flights		Swift water kayaking	
Canyoning		Motor yachts		Swimming with dolphins	
Cave diving		Motorcycle tours (Harley Davidson)		Swimming with seals	
Caving		Mountaineering		Tandem hang gliding and para gliding	
Clay pigeon shooting		Multi-day trekking		Tandem skydiving	
Croc surfing		Ocean angling		Tiger fishing	
Cycling (mountain biking)		Ocean floor walking		Tobogganing	
Diving (SCUBA)		Paintball		Tubing	
Dragon boat racing		Parachuting		Wake boarding	
Dune skiing		Paragliding (powered)		Water skiing	
Fishing (deep sea)		Parasailing		White-water (hydroboard)	
Fishing (shore)		Pelagic boat trip		Windsurfing	
				Zip lining	
				Zorbing	

1.9 As the expert in the field on a scale of 1 – 10 how would you rate the actual risk of your top /most popular adventure tour activities:

Very low risk										Extremely risky
Activities (list them here, e.g. paragliding or shark diving, etc.)	1	2	3	4	5	6	7	8	9	10
1.										

1.9.1 The main/most popular activity above has a medium duration of how many hours?

i.................................

1.9.2 What is the maximum number of clients per the main activity above?

i. ……………. per trip

1.9.3 Roughly how many trips/sales did the organisation have for 2016 for **your main activity** (i.e. number of clients who purchased each adventure activity on offer (so an answer could be +-2000 canoe trips for the year 2016) …………………………………….

1.9.4 What was your typical product cost for 2016 (so an answer could be that a typical canoe trip for 2016 cost R180 per person) R……………………………….

1.10 How important is it for your staff to have: (Tick X)

	Not important at all	**Not important**	**Neutral**	**Important**	**Very important**
Accredited training course qualifications (standardized and formal)					
Certified training qualification (non-standardized and informal)					

2. BUSINESS PRACTICE, POLICIES AND STRATEGIES

2.1 What is the **single biggest problem** you experience in running your adventure tourism business in Cape Town?

………..

………

……..

……

……

……

………..

……….

……

……

2.2 How do you suggest can the above problem be solved/overcome?

…….

…….

……..

…….

…….

…….

2.3 In addition to the biggest problem described in question 2.1, if you face other crucial problems/ challenges please briefly list them here.

…….

…….

……..

…….

…….

…….

……

……

2.4 What is your **single biggest need** of running an adventure tourism business in Cape Town?

……..

……….

……….

……….

……

……

……….

2.5 Which department(s) at the City of Cape Town and Western Cape provincial government do you have to deal with occasionally or on a regular basis and why?

……….

……

……

……….

……

3. POLICIES, MANAGEMENT, STRATEGIES

3.1 How do you view the following aspects as **stumbling blocks** in your business operations?

Global risk management model categories	**Major stumbling block** **1**	**Stumbling block** **2**	**Neutral** **3**	**No stumbling block** **4**	**No stumbling block at all** **5**	**Not applic-able**
Cost of general public liability insurance	1	2	3	4	5	

Cost of passenger liability	1	2	3	4	5	
Cost of professional indemnity	1	2	3	4	5	
Cost of personal accident insurance	1	2	3	4	5	
Legal/regulatory compliance	1	2	3	4	5	

3.2 Which of the following practices/management strategies do you have in place/do you employ? (Tick X)

First aid provision	
Incident management reports	
Assumption of risk waivers to be signed by clients	
Risk modeling	
Health and safety practices	
Contingency plan	
Risk management plan	
Evacuation plans	
Regular insurance policy advice	
Regular legal advice	
Attending risk management seminars	
Safety and emergency signs and numbers	
Skills training/staff induction	
Documented evidence of annual safety and emergency drills carried out	
Risk surveys carried out by independent body	
Your own risk analysis	

3.3 Please identify from the list those factors that you encounter in your everyday practice as adventure tour operator:

Factors	**No**	**Maybe/ Some-times**	**Yes**	**Not applicable**
Clients not following safety instructions				
Clients not understanding instructions (language)				
Horseplay/showing-off of clients				
Low level of client fitness/health				
Client inexperience/unfamiliarity with the task				
Client taking unnecessary risks/short-cuts				
Refuse to wear safety equipment/jackets				
Refuse to sign undertaking				
Alcohol over-consumption of clients				
Clients disrespecting the natural environment				
Activity difficulty level/degree of challenge for clients				
Travel time to and from the activity/transit takes too long				
Licensing and registration of business				
Municipal and other regulations restricting movement, activities				
By-laws prohibiting using certain spaces, do activities at certain times, etc.				
Risk assessment of activities				
Safety audits or reviews				

Staff/guide training				
Pre-activity written, audio or video information for clients				

3.4 On a scale of 1-5 (1= not the case at all) and 5 (almost always the case) how often do you experience the following managerial/operational issues?

	Almost always the case 1	**Some- times 2**	**Neutral 3**	**Hardly ever 4**	**Never the case 5**
Non availability of staff /skilled manpower	1	2	3	4	5
Running pillar to post for clearance from various authorities	1	2	3	4	5
High employee turnover	1	2	3	4	5
Costly insurance cover	1	2	3	4	5
Natural factors (bad weather)	1	2	3	4	5

3.5 **How important are the following aspects for industry policy or self regulations in the adventure tourism industry?**

How important are the following aspects for industry policy or self regulations	**Not important at all 1**	**Not important 2**	**Neutral 3**	**Important 4**	**Extremely important 5**
Client/guide ratios	1	2	3	4	5
Equipment use	1	2	3	4	5
Staff qualifications and experience	1	2	3	4	5
Licensing	1	2	3	4	5
Appropriate staff training with respect to the types of activities being undertaken	1	2	3	4	5
Registration and continuous accreditation of qualified instructors and operators	1	2	3	4	5
An up-front external safety audit of operators' safety provisions	1	2	3	4	5
Ongoing periodic external safety audits (perhaps three-yearly)	1	2	3	4	5
An annual declaration that they are still complying with their safety plans	1	2	3	4	5

3.6 Please indicate yes or no your opinion on the following statements:

	Yes	**No**
The adventure tourism industry in South Africa must have a regulatory body		
The City of Cape Town should have an adventure tourism strategy/policy		
There are too many adventure tour operators working in Cape Town that are not up to standard		
The City of Cape Town should relax their by-laws/regulations affecting the adventure tourism operations		
If you indicated yes in the above statement, specify which bylaws/regulations		

3.7 If applicable, where your outdoor activities take place on public land/property, what hard infrastructure would you require assistance/infrastructure provision from the City of Cape Town (e.g. toilets/slipways/parking/safety and security/approved landing places, etc.)?

……..

…….

……

……

…….

……

3.8. If any, how do you deal with conflict over outdoor activiity space with other adventure tourism operators?

……..

……..

…….

………

3.9 What would you like to see government (local, provincial and national) do in terms of assisting the adventure tourism sector?

……..

……..

…….

………

………

3.10 Please indicate (highlight) on the attached map all the areas where you operate as adventure tourism operator:

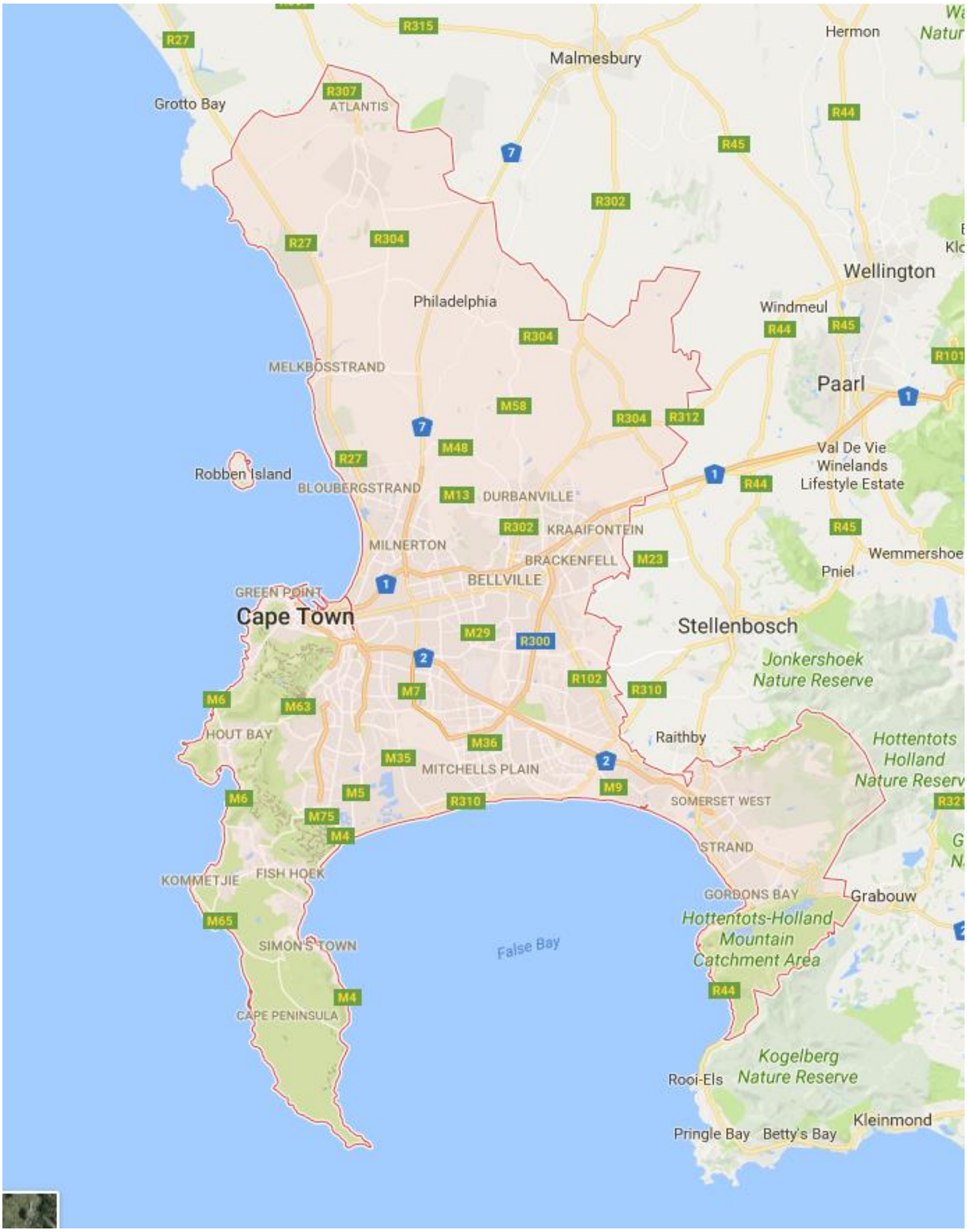
3. 11 Any other additional comments:

……..

……..

…….

Thank you for participating in the survey!


Hermon
Malmesbury
Grotto Bay
ATLANTIS
Wellington
Windmeul
Philadelphia
Paarl
MELKBOSSTRAND
Val De Vie
Winelands
Lifestyle Estate
Robben Island
BLOUBERGSTRAND
DURBANVILLE
KRAAIFONTEIN
MILNERTON
BRACKENFELL
Pniel
BELLVILLE
GREEN POINT
Cape Town
Stellenbosch
Jonkershoek
Nature Reserve
HOUT BAY
Raithby
Hottentots
Holland
MITCHELLS PLAIN
SOMERSET WEST
STRAND
KOMMETJIE
FISH HOEK
GORDONS BAY
Grabouw
Hottentots-Holland
Mountain
Catchment Area
SIMON'S TOWN
False Bay
CAPE PENINSULA
Kogelberg
Nature Reserve
Rooi-Els
Pringle Bay
Betty's Bay
Kleinmond

Appendix 3: Database of Cape Town adventure tourism operators

Available electronically only