A COMPARATIVE PROVINCIAL ANALYSIS OF COASTAL AND MARINE TOURISM (CMT) VISITOR PROFILES AND PERCEPTIONS IN SOUTH AFRICA

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DECLARATION

Submitted in fulfillment of the requirements for the degree of Masters in Environmental in the School of Agricultural, Earth and Environmental Sciences, in the College of Agriculture, Engineering and Science, University of KwaZulu-Natal, Westville campus, from March 2018 to July 2019, under the supervision of Professor Urmilla Bob.

I, Rivoni Gounden, Registration Number 215013579, hereby declare that the content of this dissertation has not been submitted in any form to any tertiary institution and, except where the work of others is acknowledged in the text, the results are the author's original work.

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ABSTRACT

Coastal and Marine Tourism (CMT) is an important sub-sector of the tourism industry and is regarded as the form of tourism that has the highest demand and therefore related impacts, especially in the context of CMT relying on sensitive natural resources. While there is increasing research in the field of tourism (including CMT), there is limited research that examines visitor profiles comparatively in different contexts. Furthermore, existing research tends to focus on tourists. This study focuses on visitors, including overnight tourists, day-trippers and locals. South Africa has a coastline of more than 3 000 km. Current CMT research in South Africa tends to focus on specific CMT activities such as whale viewing and shark diving. There is no research that undertakes a provincial comparative analysis of visitor profiles, behaviors and perceptions in relation to the three main coastal provinces that has CMT activities. Thus, this study undertakes a comparative provincial analysis of CMT visitor profiles and perceptions in South Africa focusing on the three main CMT provinces: Eastern Cape, KwaZulu-Natal and Western Cape. Specifically, the main objectives of the research were to establish the socio-economic profiles and types of CMT visitors; examine spending patterns among CMT visitors; assess the types of CMT products/ activities that are being consumed and future interest; and examine the main reasons for visiting specific CMT locations and visitors' perceptions of CMT locations in the Eastern Cape, KwaZulu-Natal and Western Cape. The methodological approach adopted is a quantitative approach, drawing on visitor surveys that were conducted as part of a larger National Department of Tourism (NDT) that was undertaken by the University of KwaZulu-Natal to develop a framework to assess the economic impact of CMT in the country. Data was collected during September 2018 to January 2019. Face-to-face interviews were conducted. Proportionate sampling was used and a total of 3 026 surveys are used in this study: 1 218 in KwaZulu-Natal, 1 108 in the Western Cape and 700 in the Eastern Cape. At purposively selected CMT locations in each of the provinces, spatially-based systematic sampling was used to select adult visitors to be interviewed. Data was subjected to descriptive and inferential statistics. The key findings are that there are statistically significant differences between some of the variables such as type of visitor, level of education, income and the nationality of the respondents; especially between the Western Cape and the other two provinces which could be attributed to the Western Cape being the key foreign tourist destination for South Africa and KwaZulu-Natal being the main domestic tourism destination. There were high levels of CMT participation among the respondents, especially in relation to recreational and leisure activities, as well as interest to participate in the future in more adventurous CMT activities such as snorkeling and water sports. This is indicative of increased demand that needs to be managed. Furthermore, respondents participated in additional activities while at the CMT locations such as shopping. Spend was mostly on food and drinks as well as accommodation and transportation among those respondents who were not local residents. There were high levels of satisfaction with aspects of the CMT locations such as parking facilities, amenities, safety and entertainment opportunities. However, differences among the provinces were noted. Understanding visitor profiles and perceptions contribute to balancing local and tourist demands and expectations, as well as understanding coastal and marine activities and interests to minimize disruptions and ensure positive experiences for visitors as well as protect the natural environment.

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LIST OF ACRONYMS AND ABBREVIATIONS

℃	Degrees Celsius
3S	Sun, Sea and Sand
CMT	Coastal and Marine Tourism
DEA	Department of Environmental Affairs
DPME	Department of Planning, Monitoring and Evaluation
EEZ	Exclusive Economic Zone
GDP	Gross Domestic Product
Km	Kilometers
Km^2	Kilometers squared
M	Meters
NDT	National Department of Tourism
NGO	Non-Governmental Organization
SPSS	Statistical Package for the Social Sciences
UKZN	University of KwaZulu-Natal
UN	United Nations
UNCTAD	United Nations Conference on Trade and Development
UNEP	United Nations Environment Program
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	United Nations World Tourism Organization
US$	United States Dollar

CHAPTER ONE
INTRODUCTION

1.1. Preamble

Orams and Lück (2014) state that nature-based tourism contributes to the coastal economy of many tropical marine systems around the world. Honey and Krantz (2007) indicate that Coastal and Marine Tourism (CMT) is amongst the largest and oldest sectors of the tourism industry, dating back to the late nineteenth century where wealthy Americans began visiting coastal areas. Biggs et al. (2015) assert that marine-orientated nature-based tourism plays an important socio-economic role, and provides an incentive for conservation in many coastal regions Liu et al. (2019) highlight that CMT (especially beach tourism) has increased globally with associated accelerated development.

There are many definitions for tourism. The United Nations World Tourism Organization (UNWTO, 2014) defines tourism as the activity of visitors which include visitor expenditure. In relation to CMT, one may define tourism as the "act of exchange recreational opportunities for economic benefits" (Kenchington, 1993: 5). Nulty et al. (2007: 1) define marine tourism as "the sector of the tourism industry that is based on tourists and visitors taking part in active and passive leisure and holiday pursuits or journeys on (or in) coastal waters, their shorelines and their immediate hinterlands". At the United Nations Conference on Trade and Development (UNCTAD) (United Nations - UN, 2014), it was estimated that globally almost 350 million jobs are linked to the oceans through fishing, aquaculture, CMT and research activities.

Burgin and Hardiman (2011) state that recreational activities (visiting beaches, swimming, surfing, yachting, etc.) which are dependent on water, have become a key element in the tourism industry. Higham et al. (2016), for example, show that whale watching is a fast growing industry across the globe and has gained considerable support from the international community as a non-consumptive activity of marine species. Cinner (2014) provides additional examples of beach tourism activities which include diving and snorkeling with manta rays and seals as well as diving with sharks and

turtles. Vainikka (2013) states that a tourist would generally choose a holiday destination where there is a seaside. Seymour (2012) indicates that South Africa's coastline (of more than 3 000 km) is a major marine tourism destination with the potential to draw more tourists from around the world.

The UN (2014) further notes that the oceans economy (also referred to as the blue economy) offers significant development opportunities for sectors such as sustainable fisheries and aquaculture, renewable marine energy, marine bio-prospecting, maritime transport, and marine and coastal tourism. In the South African context, this is supported by the launch of Operation Phakisa in July 2014 which focuses on unlocking the economic potential of South Africa's oceans and stimulating the country's blue economy (Operation Phakisa, 2014; van Wyk, 2015). Operation Phakisa (2014) identifies the Eastern Cape, KwaZulu-Natal and Western Cape as the coastal provinces to be at the driving seat of this initiative, noting that South Africa's oceans are capable of generating an estimated R129 177 billion contribution to the Gross Domestic Product (GDP) by the year 2033. Additionally, the Institute of Global Dialogue (2016) states that 250 000 jobs are directly linked to various maritime regimes locally, but with Operation Phakisa this number could be up-scaled to a million jobs. The Department of Planning, Monitoring and Evaluation (DPME, 2015: 4) articulates the vision and aspiration of Operation Phakisa:

> …by 2030 South Africa is the premier experience-based coastal and marine tourism destination in Africa and is renowned as a top coastal and marine tourism destination globally with a unique range of experiences for all visitors.

The complex CMT environment is noted as a challenge given the close association with leisure and recreational activities which include a wide variety of activities which are undertaken out of choice during leisure or play (DPME, 2015), and the range of CMT activities. The Maritime Cluster (2015) states that Operation Phakisa acknowledges that CMT and leisure is extremely diverse and covers a wide range of coastal and marine assets as well as tourism, recreational and leisure pursuits. The Maritime Cluster (2015) notes several challenges associated with Operation Phakisa that include:

- South Africa has abundant coastal and marine assets that are not adequately considered or used for tourism purposes.
- There are insufficient tourism products in the right place to make South Africa a CMT destination for local, domestic and foreign tourists.
- Too few local, domestic and foreign visitors recognize and make use of South Africa's marine assets for tourism purposes.
- The private sector in South Africa is reluctant to develop tourism products without certainty of profitability.
- Marine related events and recreation are underdeveloped and uncoordinated.

The above relate to visitor interests and demand.

Hung and Petrick (2011) argue that for South Africa to capitalize on its CMT assets, marketers indicate that it is necessary to understand the market that uses them, the reasons why people travel and what the visitors would like to gain from their trip. Wu et al. (2012) state that numerous studies have examined whether different sets of attributes, such as psychological factors, demographic factors, or characteristics of the trip, affect tourism expenditure. Furthermore, Carvache-Franco et al. (2019b) and Jarvis et al. (2016) indicate that numerous studies conclude that expenditure is affected by the overall satisfaction with a destination which leads to revisitation and positive word-of-mouth marketing. Jarvis et al. (2016) also examine how socio-economic and environmental factors contribute to trip satisfaction and the likelihood of visitors returning. They caution that it is not only important to focus on CMT stakeholders, but to also consider how many industries (such as water and electricity provision, safety and security, construction work, etc.) outside tourism, impact on factors influencing trip satisfaction. Orams and Page (2000) state that understanding tourists, who they are and what their attitudes, beliefs and desires are, forms an important component within tourism studies.

Several studies focus on visitor profiles. For example, Tkaczynski and Rundle-Thiele (2018) examine the importance of understanding who has the highest return on investment and who yields the highest dividends by assessing whale watching tourist differences using segmentation. Carvache-Franco et al.'s (2019a; 2019b) study in Ecuador, which focuses on foreign tourists, illustrate how demand segmentation at coastal destinations contributes to the commercialization

of locations to create products and services that respond to specific groups. Towner (2016a) profiles surf tourists in Mentawai Islands, highlighting economic linkages between surf tourists and local communities. Martinis et al. (2019) examined the profiles and types of tourists that visit Zakynthos Island, focusing specifically on protected areas. They assert that understanding visitor profiles can help local authorities to understand the perceptions of tourists which are crucial for the compilation of a strategic plan, as well as for the implementation of an adapted environmental policy. This is supported by Chen and Teng (2016: 213) who assert that examining and understanding tourists' perspectives promotes sustainable management practices in a context where "the growth of beach tourism has increased the need for acceptable, practical and sustainable policies". They also highlighted the importance of considering carrying capacity, especially in vulnerable and sensitive beach tourism locations. Atzori et al. (2018) further illustrate how climate change is influencing perceptions of tourist destinations. Their study revealed that beach comfort was the main reason for choosing a destination and that coastal habitat destruction and concerns pertaining to diseases are increasingly influencing where tourists will choose to travel. Birdir et al. (2013) and Rodella et al. (2019) indicate that since coastal tourism induces environmental impacts and pressure on the natural resource base; understanding demand, visitor profiles and willingness to pay for the conservation of such resources become critical. Eagleton and du Plessis (2019) state that understanding the visitor profiles and travel motives of beach goers will contribute to beach destinations in South Africa by developing effective marine tourism planning strategies through cost-effective marketing and management.

1.2. Motivation

This study focuses on visitors, including overnight tourists, day-trippers and locals. Most research in CMT, including those cited later, tend to focus almost exclusively on tourists. This study includes all three categories. As Oh et al. (2010) note, the demand for public beach access and related amenities is increasing as CMT and leisure activities increase in popularity. They highlight the need to balance local and tourist demands and expectations, as well as understand coastal and marine activities and interests to minimize disruptions and ensure positive experiences for both groups. This study examines these aspects as well as establishes the profiles of the different user groups in three coastal provinces in South Africa.

The National Department of Tourism (NDT) commissioned the University of KwaZulu-Natal (UKZN) (Prof Urmilla Bob was the project leader and is the supervisor of this Masters study) to undertake research on developing a framework to assess the economic impact of CMT in South Africa. The research was confined to using the information generated to undertake economic modelling. This study uses the data to contribute to the body of knowledge in relation to visitor profiles, experiences and perceptions in relation to CMT which is a gap in the research as discussed in the literature presented in the next section. Furthermore, very few studies examine visitor profiles adopting a comparative lens. This study compares data across the three main CMT provinces in South Africa, namely, the Eastern Cape, KwaZulu-Natal and Western Cape. Understanding visitor profiles (including spend patterns and demands), expectations and perceptions assists with developing appropriate marketing strategies and CMT product development. From a sustainability and responsible tourism perspective, which is critical for CMT given its reliance on the natural resource base as the main attraction, understanding who visits CMT sites and for what purposes also assists to ensure effective planning to protect and conserve coastal and marine resources.

Despite the growing recognition of CMT and specifically its importance in South Africa as articulated in the Phakisa Oceans Economy framework discussed earlier, limited research exists in relation to understanding visitor profiles of persons frequenting CMT locations. There is also limited research on CMT demand and future interest which this study also focuses on. Hansen (2017) and Le Berre et al. (2013) emphasize the importance of visitor monitoring in coastal and marine areas which contributes to improvement planning decisions and management in these locations. Thus, the need to examine social aspects, including perception studies, and visitor profiles contribute to the body of knowledge on CMT and visitor monitoring studies.

1.3. Aim

This study undertakes a comparative provincial analysis of CMT visitor profiles and perceptions in South Africa focusing on the three main CMT provinces: Eastern Cape, KwaZulu-Natal and Western Cape.

1.4. Objectives

The objectives of the study are to undertake a provincial comparative analysis to:

- Establish the socio-economic profiles and types of CMT visitors in the Eastern Cape, KwaZulu-Natal and Western Cape.
- Examine the spending patterns among CMT visitors in the Eastern Cape, KwaZulu-Natal and Western Cape.
- Assess the types of CMT products/ activities that are being consumed and future interest.
- Examine the main reasons for visiting specific CMT locations and visitor perceptions of these destinations.

1.5. Overview of methodological approach

The data used for this research was part of a larger study supported by the NDT with UKZN being the lead university and Prof Urmilla Bob (supervisor) being the lead researcher. Ethical approval for the study was obtained from UKZN. The researcher was involved in the development of the visitor survey instrument, data collection, data inputting and the preliminary analysis. The report submitted to the NDT focused on an overall assessment of the economic impacts of CMT using the Tourism Economic Account and Input-Output Models. As indicated earlier, this study focuses on a comparative study of the visitor profiles, behaviors and perceptions of CMT that has not been undertaken previously.

In terms of the methodology for the NDT study, a quantitative approach was adopted to undertake visitor surveys in selected CMT locations in the Eastern Cape, KwaZulu-Natal and Western Cape. Data was collected during September 2018 to January 2019. Visitors were interviewed during peak/ vacation and off-peak periods during this time. Face-to-face interviews were conducted. In total, 3 026 surveys were completed (target was 3 000): 1 218 in KwaZulu-Natal (target was 1 200), 1 118 in Western Cape (target was 1 100) and 700 in the Eastern Cape (target was 700). A proportionate sampling approach was used in relation to which province is deemed to have more visitor demand and locations for CMT. At the selected CMT locations, spatially-based sampling

was used. Fieldworkers involved in the research were placed at specific locations were trained to complete the surveys at specific locations and during specific days. On a given day, the first interviewee was purposively selected. Thereafter, persons were selected systematically, that is, on completion of a survey the 20th person passing by was approached to take part in the study. This approach was used to reduce bias since the population was not known and constantly changing, thus random sampling was not an option. Only persons visiting the location to participate in or those who had participated in CMT activities were interviewed.

Data was inputted into the Statistical Package for the Social Sciences (SPSS). This study uses the visitor survey results to undertake a provincial analysis using the constant comparative method to examine differences between the three main CMT provinces in South Africa: Eastern Cape, KwaZulu-Natal and Western Cape.

1.6. Conclusion

This chapter serves as the introductory chapter, providing the context of the study as well as the motivation, aim, objectives and methodological approach adopted. Chapter Two undertakes a review of the key literature, focusing on CMT that provides the conceptual framework to guide the study, CMT visitor profile studies and CMT perception research. Chapter Three outlines the methodological approach used and includes an overview of coastal and marine areas and key activities together with a focus on the three coastal provinces (Eastern Cape, KwaZulu-Natal and Western Cape) where the primary research was conducted. The chapter also includes a discussion of the quantitative survey conducted as the overall research design, providing an overview of the main themes covered in the survey, the sampling approach used and data analysis undertaken. Chapter Four provides a thematic analysis of the key findings. The final chapter provides a summary of the main research findings in relation to the objectives of the research as well as recommendations emanating from the study. The next chapter undertakes the literature review.

CHAPTER TWO
LITERATURE REVIEW

2.1. Introduction

This chapter undertakes a literature review of relevant themes and debates, drawing largely from an examination of academic publications as well as reports. CMT is the conceptual framework that informs the research. Therefore, the first section contextualizes the research in relation to examining broad tourism trends and highlighting specifically CMT trends. This is followed by a discussion of key CMT concepts, definitional clarifications as well as the scope of what constitutes CMT and differences between coastal tourism and marine tourism activities. Thereafter, key aspects and studies pertaining to CMT profiles are presented, highlighting the importance of understanding visitor profiles and demands. Next, CMT visitor perception studies are looked at, again underscoring the value of these types of research. A brief overview of CMT in South Africa is then provided prior to concluding the chapter.

2.2. CMT trends: An overview

Lenzen et al. (2018) state that tourism contributes significantly to global GDP, and is forecast to grow at an annual rate of 4%, thus outpacing many other economic sectors. Similarly, Glaesser et al. (2017) indicate that the global tourism market has experienced continual growth and deepening diversification making it one of the world's fastest growing economic sectors. Cañavate et al. (2019) state that oceans, seas and coasts are the main motor of growth, supporting a wide range of human activities that provide human well-being in relation to a series of direct and indirect beneficiaries through the value chain and jobs related to the sea sector. Potgieter (2018) asserts that the oceans economy is a key component in global economic growth and development which offers great opportunities as well as challenges and risks. Marafa and Chau (2016) also state that tourism in coastal areas results in both positive and negative effects, especially on the environment, as a result of activities in these areas by proponents and tourists. They underscore the importance of balancing demands since tourism developments result in the modification of coastal

environments but future sustainability and growth flourish where natural environments are left unmodified since the pristine nature of the environments attract visitors.

Fraguell et al. (2016) state that CMT is based on the use and consumption of biophysical factors, specifically turning a natural resource (coastal and marine environments) into a social and economic value. Additionally, Rutty and Scott (2015) state that coastal tourism is strongly dependent upon a destination's natural resource base which include beach quality and extent as well as climate. They assert that the importance of a destination's natural resources is most evident in relation to the trend that the world's largest international tourism flows are from cooler regions to warmer regions in search of sun, sea and sand (3S) vacations.

CMT is one of the fastest growing areas within the world's largest industry, tourism (Hall, 2001; Tegar and Gurning, 2018). For example, as Dwyer (2017) shows, specifically for island nations, CMT contributes to more than 20% of these countries' GDPs. Weatherdon et al. (2016) state that tourism is one of the largest sectors in the global economy, with coastal tourism comprising a significant part of global revenues derived from the tourism sector. Papageorgiou (2019: 29) asserts that "coastal tourism is currently the most important tourism activity worldwide and its development is based on the optimal combined use of tourism resources available in the coastal region". Karnauskaitė et al. (2019) indicate that the coastal and marine sector is experiencing substantial growth which will continue. Furthermore, Papageorgiou (2016: 45) argues that it is evident that CMT "not only represents the largest and constantly growing segment of the tourism industry, but is also among the most important (and fastest growing) economic activities taking place at the sea". Porter et al. (2018) state that the diversity of CMT as well as its potential for more diverse employment opportunities makes it attractive as a potential development strategy for livelihood diversification.

Potgieter (2018: 49) states that peoples' "relationship with the oceans is old and central to our existence: the sea carries global trade and commerce, it is a crucial source of food and energy, and it is a great highway of strategic and military importance". Honey and Krantz (2007) trace the trajectory of the emergence and growth of CMT, which they argue is amongst the largest and oldest

sectors of the tourism industry. They state that CMT dates back to the late nineteenth century when wealthy Americans began visiting coastal areas, particularly Florida.

Meyer-Arendt (2018) provides an overview of geographic research on coastal tourism. Meyer-Arendt (2018) states that that the fact that one of every seven articles in *Tourism Geographies* is set or focused upon a coastal tourism destination indicates that geographic research on coastal tourism continues to be strong. Furthermore, Meyer-Arendt (2018) asserts that there are at least 12-15 print and online tourism journals as well as dozens more non-tourism journals that publish articles on various aspects of coastal tourism. Additionally, the shift from place-based analysis which tended to be descriptive, to broader conceptual or theoretical underpinnings indicate an increased focus on examining linkages to broader aspects of tourism, the tourism industry, social/ political systems or economic systems (Meyer-Arendt, 2018).

Papageorgiou (2016) states that the coastal and maritime tourism industry is one of the most important and that has grown in recent years among all the human activities that take place at the sea. Joseph (2017: 50) indicates although there is a growing body of research that focuses on CMT (especially sustainable coastal tourism), very few studies examine social aspects with most being "scientific in nature dealing with coastal destruction, sea level rise, beach erosion, beach nourishment, destruction of coastal ecology, etc."

2.3. CMT: Key definitions and scope

As indicated in the introductory chapter, definitions of CMT relate to activities of visitors to these locations (UNWTO, 2014), recreational opportunities in these areas for economic benefits (Kenchington, 1993) and tourists and visitors participating in active and passive leisure activities in and near coastal and marine areas (Nulty et al., 2007). Hall (2001: 603) states that "the concept of coastal tourism embraces the full range of tourism, leisure, and recreationally oriented activities that take place in the coastal zone and the offshore coastal waters" and "marine tourism is closely related to the concept of coastal tourism but also includes ocean-based tourism such as deep-sea fishing and yacht cruising". Hall (2001) further notes that coastal tourism, as the component of

tourism where the water/ sea aspect dominates and the coastal environment, is the main asset which provides a destination advantage. The United Nations Environment Program (UNEP, 2009: 10) asserts that coastal tourism is "based on a unique resource combination at the interface of land and sea, offering amenities such as water, beaches, scenic beauty, rich terrestrial and marine biodiversity, diversified cultural and historic heritage, healthy food and good infrastructure". Rogerson et al. (2018) indicate that there are different forms of coastal tourism that service different market segments with varying potential for economic inclusion and opportunities for business development.

There are differing ideas on what geographically constitutes coastal and marine areas. Papageorgiou (2019) asserts that coastal areas are transitional areas between the hinterland and the sea, and that these areas are subjected to very high population pressure due to urbanization. Yustika and Goni (2019) state that geographically, a coastal area is defined as the land bordering the sea or having at least half of its territory within 10 km of the coast. On the other hand, Barbier (2017) indicates that coastal and marine environments can begin up to 100 km inland, extend to the continental shelf, and include ocean systems with waters up to 50 m in depth. Barbier (2017) identifies distinct coastal and marine ecosystems which include sand beaches and dunes, estuarine and coastal wetlands (such as marshes and mangroves), reefs and seagrass beds.

Numerous activities constitute CMT. The CMT lab was a joint collaboration by the NDT and the Department of Environmental Affairs (DEA) in 2016 to advance the potential of South Africa's natural resource base with a special focus of this initiative on coastal and marine resources. The Lab distinguished between marine tourism and coastal tourism activities as indicated in the Table below.

Table 2.1: Marine tourism and coastal tourism activities (NDT, 2016)

Marine tourism	Coastal tourism
Marine wildlife tourism: whales, seals, dolphins, turtles, etc. Water sports: surfing, parasailing, yachting, water skiing, etc. Recreational fishing: boat-based fishing, spear fishing, fishing competitions, etc. Events/ festivals/ marine competitions Scuba diving/ snorkeling Shark cage diving Ocean experiences: cruise tourism, marinas, island tourism, under water archaeology, etc.	Sand/ beach activities: swimming, beach combing, kite-flying, sand dune surfing, sand castles, etc. Pure recreational: dining out and shopping Coastal wildlife tourism: land-based whale watching, marine turtle tours, etc. Sightseeing: cycling, light house tourism, marathons, etc. Coastal heritage and events: cultural historical tours, local seafood and cultural tourism, etc. Educational and scientific excursions: visiting aquariums, school tours, etc. Spiritual experiences

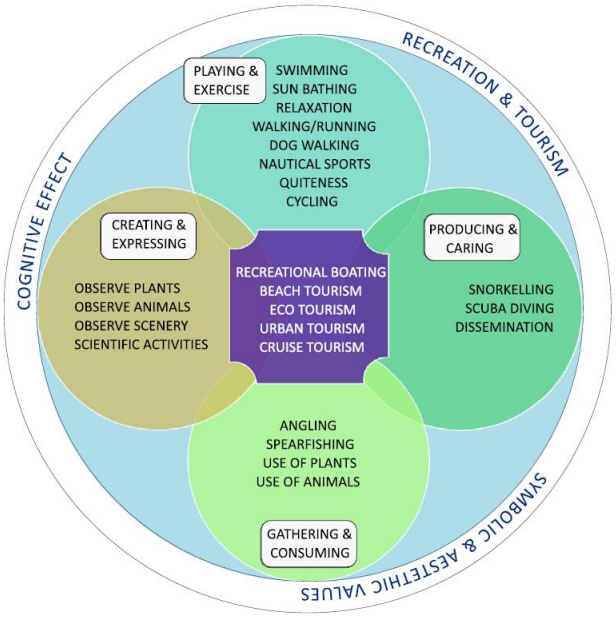
Similar distinctions are made by Papageorgiou (2016) who state that coastal tourism relate to sun and beach activities such as sunbathing, swimming and coastal routes while marine tourism is dominated by cruises as well as other water sport activities such as scuba diving, sailing, underwater and sport fishing, wind surfing, surfing, tours to marine parks and observation of wildlife and observation of marine mammals. Similarly, Tegar and Gurning (2018) state that marine tourism constitutes a form of tourism that is completely connected to and dependent on the sea and the marine environment, covering activities taking place in the deep oceans such as cruising and sailing as well as leisure water-based activities and nautical sports generally (conducted in coastal waters) such as scuba diving and wildlife mammal watching. Coastal tourism, on the other hand, as indicated by Tegar and Gurning (2018), covers beach-based tourism and recreational activities such as swimming and sunbathing. Tegar and Gurning (2018) note that although coastal tourism and marine tourism are distinct forms of tourism, they are very closely related as a result of the water/ sea element and interactions. Furthermore, Tegar and Gurning

(2018) highlight that in relation to marine tourism, while the majority of activities take place in the sea, much of their supporting facilities and infrastructure are usually found on land.

Key CMT attractions are whale watching, diving and snorkeling (Cinner, 2014; Higham et al. 2016; Kruger et al., 2018). In South Africa, for example, O'Connor et al. (2009) state that boat and land-based whale watching are major CMT attractions. They show that there was a 1.1% per annum increase in overall numbers of whale watch tourists from 1998 to 2008 with a substantial increase in boat-based whale watchers during the same period of 14% per annum.

In relation to activities associated with CMT, Yustika and Goni (2019) note the importance of also including coastal tourism development as well as the infrastructure that supports coastal development. Drius et al. (2019) use a previous classification of recreational groups and cultural ecosystem services to develop a framework based on five coastal tourism typologies as shown in the Figure 2.1. The five key coastal tourism typologies (in the middle of the Figure) are recreational boating, beach tourism, ecotourism, urban tourism and cruise tourism. These typologies overlap with the four recreational activities groups: playing and exercise, producing and caring, gathering and consuming, and creating and expressing. These relate to the ecosystem services provided which include recreation and tourism, cognitive effects, and symbolic and aesthetics values. Rudianto et al. (2019) state that coastal zones play an important role in providing various valuable ecosystem services and are sensitive and vulnerable to environmental changes as a result of human overpopulation and interactions between the land and ocean.

Figure 2.1: Recreational activities in relation to five coastal tourism typologies (Drius et al., 2019: 1305)



CMT activities are often linked to adventure tourism activities. For example, Giddy's (2018) study to develop a profile of commercial adventure tourism participants in South Africa specifically, was conducted at eight different commercial adventure tourism activities along the Southern Coast of South Africa (specifically between the cities of Cape Town and Port Elizabeth) since coastal areas include a number of important tourism destinations. Furthermore, Giddy (2018) states that these areas in South Africa have seen a recent influx of commercial adventure tourism operations and activities.

Barbier (2017) identifies and categorizes coastal and marine ecosystem services into goods, services and cultural benefits. Some of the goods Barbier (2017) identifies are fish harvests, wild plant and animal resources, raw materials, genetic material and water. The main services Barbier (2017) notes are recreation and tourism, transportation, scientific and educational opportunities, flood control, storm protection, pollution control, breeding and nursery habitats, shoreline stabilization and erosion control, and carbon sequestration. The cultural benefits are bequest for future generations and religious significance. Leijzer and Denman (2014) assert that tourism literature has indicated the potential benefits of coastal tourism for the economy, society and the

environment. They state that the positive benefits relate particularly to “revenue generation, local job creation and prosperity, infrastructure and community facilities, awareness of the need for conservation, investment in the environment and cultural heritage, and the contribution to sustainable community livelihoods”, while the main challenges and issues were “physical destruction and loss of amenity, loss of habitat and biodiversity, pollution, resource consumption and competition, climate change, limited community engagement and benefits, property development patterns and motives, and seasonality and sensitivity of demand” (Leijzer and Denman, 2014: 2).

Marafa and Chau (2016) state that the coastal area, particularly the interface of land and water, is endowed with numerous aspects and opportunities for alternative tourism, specifically adventure, marine and ecotourism. Beach tourism in particular, according to Eagleton and du Plessis (2019: 209), “forms a critical part of the blue economy and is world renowned for attracting visitors partaking in various activities which motivates them to travel to certain destinations”. Tegar and Gurning (2018: 3) state that the blue economic concept emerged to address the concern that the world economic system tends to be exploitative and environmentally destructive, embracing principles such as:

- Natural resources efficiency.
- Zero waste: leave nothing to waste - waste for one is a food for another - waste from one process is resource of energy for the other.
- Social inclusiveness: self-sufficiency for all – social equity - more job, more opportunities for the poor.
- Cyclic systems of production: endless generation to regeneration, balancing production and consumption.
- Open-ended innovation and adaptation: the principles of the law of physics and continuous natural adaptation.

Cañavate et al. (2019) link blue tourism to blue growth. They state that blue tourism includes tourism carried out on the coast or at sea which is capable of incorporating, in relation to the quality of the service offered, the economic, social and environmental aspects of sustainability to minimize negative impacts on the natural ecosystem and the local economy. Blignaut et al. (2016) state that

that coastal and marine resources offer a range of ecosystem goods and services to its users which include water quality maintenance, visual amenity, beach recreation and shipping channel maintenance. They note, importantly, that the use or change in one service can affect others. Similar sentiments are expressed by Drius et al. (2019) who identify the key ecosystem services associated with coastal and marine habitats which include climate regulation, protection from wind and aerosol, erosion regulation, recreation and tourism, and existence value of biodiversity. Pueyo-Ros et al. (2018) also note that coastal areas provide a range of ecosystem services and indicate that the recreational functions are often more recognized rather than critical functions such as protection against extreme climate events as well as food and water provisioning. Additionally, as Joseph (2017) asserts, coastal tourism being the fastest growing form of modern tourism puts immense pressure on the coast.

Eagleton and du Plessis (2019) further note that a key aspect to consider is why specific beachgoers choose specific destinations, thus highlighting the importance of undertaking research that focuses on both the profile of visitors as well as their motives. Saayman (2017) indicates that beachgoers increasingly consider recreational activities (such as bike riding, surfing and fishing) as well as facilities and services (including infrastructure, safety, litter and noise) present at specific beach locations when making decisions regarding which beaches to visit. In response to these demands, Saayman (2017) state that the beach tourism sector is changing in terms of motives of visitors, their profiles and activities they participate in. Additionally, Saayman (2017) asserts that a new tourist profile is emerging with characteristics of being more independent, use of the internet and social media to make decisions and communicate experiences while travelling, and the desire for more unique and different experiences. Thus, as Biggs et al. (2015) indicate that tourist experiences are a central component of the sustainability of tourism enterprises which contribute to a destination's attractiveness.

A key concept in this study is CMT location demands. Joseph (2017) states that increasing population pressures in coastal locations cautions that the increasing pressures and demands on CMT locations and environments, as a result of growing numbers of residents in these areas (which now accommodates more than 50% of the world's population and increasing business and industrial interests) and well as the growth of the number of tourists can threaten the sustainability

of the environmental resources and the quality of beaches. This is a concern also identified by Ghosh and Datta (2017), Lui et al. (2019) and Oh et al. (2010) who argue that these competing demands and increasing development pressures need to be balanced. In this context, a key aspect of better understanding these demands is examining the profiles and interest of visitors to these locations. Linked to demands and pressure is the increasing focus on promoting sustainable management policies and environmentally responsible practices in sensitive ecological beach locations (Chen and Teng, 2016; Kitsiou et al., 2002; Tegar and Gurning, 2018). Furthermore, Ban et al. (2017) indicate the importance of not only having policies but to monitor compliance thereof.

In South Africa in particular, the NDT (2016) notes aspirations to reach the goals of the coastal and marine sector contributing R43.3 billion to the GDP and double employment numbers by 2030. The importance of employment creation is also indicated by Gallo and Montanari (2017). Furthermore, the NDT (2016) expresses the goal for South Africa to be ranked amongst the top 10 tourism destinations globally and to grow up to 9% annually. Additionally, the NDT (2016) indicates that the tourism value chain is complex and includes multiple stakeholders with a range of contributing factors and dimensions that influence decision-making by potential visitors. The key aspects that potential tourists consider are indicated in Table 2.2.

Table 2.2: Key questions that tourists consider when making decisions (NDT, 2016)

Where do I want to go?	This is influenced by media (including travel channels, advertising and marketing campaigns), word-of-mouth influence from friends and family, international and local travel agents and tour operators and self-planned trips.
How do I get there?	International and national air carriers, ground transportation and cruise lines.
Where will I stay?	Luxury, large and small hotels and village accommodations, living with friends and family, camping, etc.
What will I see and do?	Beach activities, water-based activities, events, cultural experiences, recreational and retail, etc.

Different types of tourists, and CMT location visitors more generally (including local residents), are influenced by different aspects indicated in Table 2.2. These aspects are unpacked in this study as well. The Table, however, does not include how environmental quality influences visitor decisions. Atzori et al. (2018) and Weatherdon et al. (2016) show how climate-induced changes are influencing perceptions of tourist destinations and travel decisions. Schuhmann et al. (2019) examine how tourists' decisions to revisit Barbados may be affected by changes in coastal and marine quality. They undertake tourist surveys to examine how tourists' stated willingness to return is affected by scenarios involving changes in seawater quality, beach width and coral reef health. The results of Schuhmann et al.'s (2019) study indicates that return decisions are sensitive to changes in all aspects of coastal and marine quality, specifically a reduction in seawater quality discourages tourists' intention to return more than other environmental factors. They indicate that this result was expected since tourists' major attractions to Barbados are sea, sand and sun products and that tourists require value for their money. Understanding how tourists respond to environmental changes helps destination managers, marketers and policymakers who rely on repeat visitation data to develop marketing strategies and infer future direction (Schuhmann et al.,

2019). Furthermore, Peña-Alonso et al. (2018) state that the knowledge of the users' profiles and perceptions is an important component for establishing management measures.

Mudarra-Fernández et al. (2019), using a systematic review of the literature, identify and classify variables that influence tourist expenditure. They assert that these variables affect tourist expenditure in different ways and is influenced by the type of tourism activity and the services required to participate in the activity. They main socio-economic variables that affect spend identified by Mudarra-Fernández et al. (2019) were gender, age, educational level, occupation, income, nationality, type of family (number of members), home language/ mother tongue and life cycle. Dodd and Holmes (2019) also identify similar socio-demographic variables that affect satisfaction levels among CMT visitors which include age, gender, education, type of visitor (resident, seasonal resident and visitor) and number of people in group. The study results reveal that beachgoers interviewed were evenly distributed from all age categories and they were more likely to be female visitors, and more than 50% were educated with a college or university degree. Mudarra-Fernández et al. (2019) also identify variables related to the characteristics of the trip which influences which activities visitors participate in and the services they use which were duration of the stay, loyalty to the destination, accommodation type, if package tour, number of persons of the group, places visited, relationship between the persons in the group and travelling companions, season when the trip is taken, trip planning, means of payment and use of technology. Other variables that Mudarra-Fernández et al. (2019) identify were personality, reason for the trip, satisfaction and values of the tourist which they identified as psychological attributes of the tourist.

2.4. Profile of CMT visitors

Lui et al. (2019) and Oh et al. (2010) highlight that there is an increased demand globally for beach access and amenities for tourism, recreational and leisure activities, and development purposes including real estate growth. Dodd and Holmes (2019) and Vainikka (2013) assert that tourists often choose seaside holiday destinations which make coastal areas popular globally. Oh et al. (2010) indicate that as coastal destinations continue to grow, due to tourism and residential expansion, the demand for public beach access and related amenities will also increase. Tegar and

Gurning (2018) assert that key aspects that visitors consider in relation to a destination are attractions (often provides the initial motivations to travel to a specific destination and include natural components, activities, buildings and culture), amenities (support services and facilities linked to transportation, accommodation, restaurants, recreational facilities, visitor information, tourist guides and operators, etc.), accessibility (ease to reach a destination), human resources (trained workers since tourism is a labor intensive sector), image (a destination's uniqueness, environmental quality, scenery, safety, friendliness, service level, etc.) and price (relates to affordability and includes costs for transportation, accommodation, food, other services, attractions and tours, etc.).

CMT research tends to focus on tourists when examining visitor profiles although in many parts of the world, especially in developing contexts such as South Africa, the main visitors to CMT locations are locals and day-trippers. This is supported by Ahmed et al. (2008) who indicate that the dominance of locals and day-trippers when examining beach sport tourism events in Durban, South Africa. Thus, it is important to look at the profile of the different types of visitors rather than tourists only, which is the approach that this study adopts.

Several factors influence decisions to visit a particular location and the experiences they leave with. Wu et al. (2012), for example, examine socio-psychological and demographic factors as well as characteristics of the trip and the destination. Orams and Page (2000) indicate that tourist profiles that examine who they are, as well as their attitudes and desires, is an important part of tourism research. This study supports this contention but extends visitation to CMT locations beyond tourists to include locals and day-trippers as well.

Experiences at the destination and overall satisfaction influence expenditure levels, repeat visitation and positive word-of-mouth marketing (Carvache-Franco et al., 2019a; 2019b; Jarvis et al., 2016; Kim, 2014). Jarvis et al. (2016) specifically indicate that socio-economic profiles of the visitors and environmental factors at the destination influence trip satisfaction and repeat visitation. They caution that it is not only important to focus on CMT stakeholders, but to also consider how many industries (such as water and electricity provision, safety and security, construction work, etc.) outside tourism impact on factors influencing trip satisfaction. Jarvis et al.'s (2016) review of

the literature, as well as analysis of empirical data from their research, reveal different aspects of visitor profiles that influence perceptions and experiences which include:

- Age: younger tourists display higher levels of satisfaction and both older and younger visitors are more likely to return.
- Gender: males are more likely to return and females are more satisfied.
- Educational level: tourists with higher education levels are more likely to return and those with lower levels of education are more likely to be satisfied.
- Marital status: married people are more likely to return.
- Country of origin: different nationalities have different likelihoods of repeating their visit and express different satisfaction levels.
- Income: low income visitors are less likely to return and higher income tourists are more satisfied.

Other variables that Jarvis et al. (2016) identify that affect repeat visitation and visitor satisfaction were: if previously visited the area, trip cost/ perceived value for money, facilities at tourist destination (especially accommodation and restaurants), climate, economic development, quality of social capital (especially safety and security considerations) and quality of the natural environment. Dodd and Holmes (2019) identify three key components that affect satisfaction at CMT locations which they use in their study to examine the relationships between visitor demographics, satisfaction, beach characteristics and likelihood for repeat visitation:

- Satisfaction with facilities: this aspect assessed visitor satisfaction with the facilities at the beach including washrooms/ change rooms, environmental education, dog-friendly beach area, designated swimming area, garbage/ recycling containers, and access for persons with disability.
- Satisfaction with the beach/ location: this included an assessment of litter/ refuse and plastics on the beach, water quality, water cleanliness (amount of litter/ refuse in the water), water clarity, and amount of algae present (in the water, and/ or along the shoreline).
- Overall experience satisfaction: was a single item variable used to assess a visitors' overall satisfaction with their overall experience at the beach on the day of the interview.

A key aspect to consider in relation to the profile is length of stay of overnight visitors and type of accommodation used, both of which have socio-economic and environmental impacts. Scholtz et al. (2015) examined determinants of length of stay at three of South Africa's coastal national parks (the Addo Elephant, Tsitsikamma, and Wilderness National Parks). They used destination-based surveys based on self-administered questionnaires during 2012 and 2013 (496 completed questionnaires were used in total), and found similarities and differences among visitors in relation to length of stay which destinations need to consider to encourage longer visits to these ecotourism destinations. In terms of the profile of visitors, their study results indicate that visitors were mostly homogenous in terms of their demographic characteristics, but differed in relation to behavioral characteristics such as length of stay. Scholtz et al. (2015: 23) emphasize the importance of understanding length of stay within national parks which is applicable in relation to nature-based tourism generally including CMT:

> An understanding of the factors that influence visitors' length of stay at the parks is therefore required, as longer length of stay could consequently lead to an increase in spending, loyal visitors, as well as an increase in tourism in the areas surrounding the park, which are vital for the future sustainability of these parks.

They further identify three ways in which understanding length of stay can contribute to the sustainability of ecotourism destinations by identifying which are the determinants of length of stay; the motivations to travel to nature-based destinations; and how each segment rates their satisfaction with destination attributes. Scholtz et al. (2015: 24) draw on research to identify internal (visitors) and external (destination-specific attributes) influential factors that influence length of stay:

- Internal
    - Socio-demographics (age, gender, occupation, level of income, family composition, etc.)
    - Behavior (preferred activities, accommodation, mode of transport, group size, etc.)
    - Motives for visiting
- External
    - Destination image

- Location and/ or distance to travel
- Services and amenities on offer
- Climate and/ or season

Furthermore, Scholtz et al. (2015) state that the outcomes, if the internal and external factors are favorable, are larger socio-economic impact, ability to attract visitors who stay longer and spend more, development of destinations (expansion, improving and maintaining), increase in bed occupancy rate, funding for conservation and identifying the most lucrative target markets. Lange (2015) also indicates that nature-based tourism (including CMT) can contribute to economic development and create strong incentives for sustainable management and conservation of ecosystems when it generates income and employment to the local economy.

Jarvis et al. (2016) and Krelling et al. (2017) indicate that research shows that a range of aspects influence visitors' beach choices which include beach characteristics (such as shoreline characteristics and beach length), landscape, water quality, scenery, crowding and amenities. Jarvis et al. (2016) further state that while several factors influence repeat visitation to a destination, there is consensus that the overall trip satisfaction is the most important one.

Studies also indicate how the quality of the CMT environments influence visitor decisions (Chen and Bau, 2016; Kitsiou et al., 2002; Lucrezi et al., 2018; Snider et al., 2015). These studies identify key aspects to consider which include infrastructure, facilities and amenities in the area; evidence of environmental degradation including trampling, littering and over-fishing; and cleanliness and safety in coastal and marine locations. These studies also indicate that visitors can have negative impacts on the beach environments mainly by over-extracting as in the case of fishing and destroying flora and fauna in these areas. Furthermore, as Hall (2001) indicates, CMT does not only comprise the focus on visitors travelling to these locations but also associated developments which include accommodation facilities (including second homes, restaurants and food industry, resorts, etc.), the infrastructure supporting coastal development (for example, retail businesses, road infrastructure, marinas as well as activity suppliers) and tourism activities discussed earlier.

Several studies examine visitor profiles (including travel motivations) of CMT locations. As stated earlier, the main focus of these studies is often on tourists rather than visitors holistically which this study does. For example, Towner (2016a) profiles surf tourists in Mentawai Islands using an online questionnaire and notes economic linkages between surf tourists and local communities. Towner (2016a) states that although surf tourism is emerging as a vital source of economic income and employment opportunities for remote communities in less developed countries, little is known about adventurous surfers themselves. Goliath et al. (2018) also note that in the South African context, coastal tourism has been identified by the government as a niche area with the potential to create employment, particularly in rural communities. They further state that tourism is regarded as a prospective economic activity that can make a positive contribution to the local economy by employing local people and preserving rural communities. Towner's (2016a) study shows that that many of the surfers travelling to the Mentawai Islands were different from the perceived stereotype of being well-educated middle-aged males, with high discretionary income and travelling on expensive prepaid packages. The surf tourists travelling to Mentawai Islands on package holidays had only a slightly lower daily local expenditure (US$21) compared to independent travelers (US$22) which is indicative of economic linkages between surf tourists and the local community (Towner, 2016a).

Tkaczynski and Rundle-Thiele (2018) examine whale watching tourist differences using segmentation. They conclude that it is important to understand who has the highest return on investment and who yields the highest dividends. Kruger et al. (2018) also examine whale watching in South Africa, especially to develop an experience-based typology of visitors to a South African whale watching festival, the Hermanus Whale Festival. Their research segmented whale watchers in South Africa in relation to factors that attendees regarded as important for a memorable experience, identifying abundant experience seekers, convenience experience seekers and comprehensive experience seekers as key categories. Kruger et al. (2018) highlight in their results that segmentation is a useful research tool for producing a clear visitor profile that enables strategic insights regarding the preferences of specific market segments to manage the whale viewing experience which are applicable to similar natural events generally.

Kruger et al.'s (2018) study also used a visitor survey (self-administered with a total of 231 usable questionnaires that were analyzed) to collect information on the socio-demographic profile of the whale festival attendees, motivational factors and their experiences at the festival. The specific socio-demographic variables they used were gender, age, country of residence, level of education, marital status, group size, the number of persons paid for, the length of stay, expenditure, the number of previous visits, tourist attractions visited, and whether the visitor travelled to witness other natural events. Similar aspects are included in this study. In relation to Kruger et al.'s (2018) research, the results indicate that most respondents were female with an average age of 34 years, spoke English or Afrikaans, were from the Western Cape province, either completed matric or had post-matric qualifications, did not travel to witness other similar natural events and were not planning to visit any other tourist attractions while in the area. Furthermore, respondents had previously attended the festival an average of 1.83, spent 2.29 nights on average in Hermanus, travelled in groups of two to four people, and were financially responsible for one person, spending an average of R1 594.80 (US$109).

Carvache-Franco et al. (2019a) undertook research using on-site surveys in Ecuador that focused on foreign tourists in Montañita. They show how demand/ market segmentation results in commercialization at specific coastal destinations of products and services that target specific groups. Woodside and Martin (2008) argue that market segmentation is important since it can offer a competitive advantage to users because resources can be targeted to specific markets rather than attempting to cover the entire market. Carvache-Franco et al. (2019a; 2019b) state that that tourist demand segmentation provides important information for creating products targeting specific clusters, thus contributing to effective marketing. Their research identified three tourist segments which are closely associated with three motivational dimensions:

- Beach lovers (sun and beach): high motivations for enjoying the sun and the beach experiences.
- Coastal nature (ecotourism): high motivations for enjoying the typical gastronomy in coastal areas, for the sun and the beach, for the tourist attractions and for knowing the flora and fauna (biodiversity).
- Coastal passive (water sports and social visits): medium and low motivations in all aspects.

Carvache-Franco et al. (2019a) further use the motivational dimensions to identify four typologies of foreign tourists:

- Eco-coastal tourists: those who visit the destination motivated by climate, sand and contact with nature.
- Indifferent tourists: those with low scores in almost all motivation criteria and who are not clearly related to any of the three dimensions identified above.
- Water sports tourists: those who visit the destination motivated by surfing and who enjoy the sun and the beach.
- Sun and beach tourists: those who visit the destination and are mainly motivated by rest and relaxation together with sun and beach criteria.

Carvache-Franco et al. (2018) identify similar motivations associated with beach and the sun, rest and relaxation, and enjoying restaurants and the nightlife. Two motivational dimensions are used by Prebensen et al. (2010) to characterize visitors to coastal destinations:

- body-related: sun and warmth as well as fitness and health-related motivations.
- mind-related: culture and nature as well as escapism-related motivations.

Onofri and Nunes (2013) in their global study, categorize two segments of coastal tourists:

- Greens: they choose a coastal destination because of their preference for cultural and natural environments.
- Beach lovers: they choose a coastal destination because of their preference for the beach.

Dodd and Holmes (2019) state, and it is evident in the literature reviewed as well such as Carvache-Franco et al. (2018, 2019a; 2019b) and Onofri and Nunes (2013), that there are a number of socio-demographic characteristics that can be used to segment beach visitors but caution that the same segment characteristics cannot be applied to different beaches since beach characteristics and the type of tourists differ from one place to another.

South African studies also reveal key travel motivations among persons visiting coastal and marine locations. For example, Saayman et al. (2009) identify five travel motivation factors for visiting marine areas: socialization, escape and relaxation, site attributes and trip features, destination attractiveness and personal attachment. In another study on this topic, Kruger and Saayman (2010) categorize six motivations that influenced visitors to the Kruger and Tsitsikamma National Parks: nature experience, escape and relaxation, seeking knowledge, park attributes, nostalgia and photography. Martinis et al. (2019) focus on the profiles and types of tourists visiting protected areas on Zakynthos Island. They used a questionnaire-based survey with a sample size of 2 981 participants and examined tourists' profile, their social-demographic characteristics, their environmental awareness and the degree of their recreational satisfaction.

The importance of marine protected areas are noted by Barker and Roberts (2008), Sink (2016) and Sowman and Sunde (2018). Barker and Roberts (2008) state that marine protected areas are those areas which allow opportunities for conservation management and regulate visitor numbers and activities, including restricting visitation and extraction of marine resources. They further indicate that in the Calamianes Islands in the Philippines, marine protected areas serve the purpose of improving coastal management as well as balancing conservation and development imperatives by engaging with multiple stakeholders, including government and communities. Sowman and Sunde (2018) focus on marine protected areas in the South African context which they argue continue to be a favored tool for biodiversity conservation.

Understanding visitor numbers and impacts are critical to ensure environmental management since, as indicated by Higham et al. (2016) and Kiszka et al. (2015), when poorly regulated, tourism based on the observation of marine megafauna (such as whale watching) can also cause disturbances to the animals and have negative ecological consequences. New et al. (2015) also highlight the impacts of disturbances associated with CMT activities on the behavior of marine life and ecosystems more generally. They also show how feeding, mainly done to entice marine life for visitor satisfaction, affects marine life behavior. Similarly, Vianna et al. (2012) reveal that long-term interactions between sharks and divers interfere with the behavior and ecology of shark populations. Their survey included questions about expenditure on accommodation and other

activities while at the destination as well as perceptions among divers about the shark sanctuary and its influence on their decision to visit Palau.

In relation to economic impacts, Alegre et al. (2013) and Medina-Muñoz and Medina-Muñoz (2014) state that the profile of tourists as well as trip characteristics such as accommodation and other spend patterns are factors that are commonly used to determine tourism expenditure which is an important aspect of assessing tourism trends and impacts. Mitra et al. (2019) also indicate that the main determinants of tourism expenditure are income and origin as well as socio-economic, trip-related and psychographic characteristics. Thus, the profile of tourists is key to better understand economic impacts. Legohérel and Wong (2006) caution, however, that tourist profiles and trip characteristics are not always the best predictors of tourist perceptions and behavior which lead to tourist spend at destinations. Cárdenas-García et al. (2016) indicate that various studies show that overall satisfaction about a destination is one of the main factors that affect expenditure. Satisfaction about a destination also influences intentions for repeat visitation to a destination as noted earlier. Jarvis et al. (2016) state that a successful tourism industry does not only need to attract new visitors but should encourage repeat visits because repeat visitors increase economic profits and reduce marketing costs.

Carlsen and Wood (2004) reported on a 2004 study conducted in Western Australia by the Sustainable Tourism Cooperative Research Center to assess the economic value of recreation and tourism in national parks (including marine parks) and forests. Visitor spending from surveys was used to measure the direct economic value. Carlsen and Wood (2004) indicate the advantages associated with measuring spending through visitor expenditure surveys which include higher response rates as well as opportunities to include additional information about visitor characteristics and behavior to inform management practices in these areas. Thus, visitor expenditure surveys can also be a methodological approach to establish and track visitor profiles and impacts by examining behavior. The study adopted a self-administered survey approach by distributing them in places of accommodation, visitor centers and national park checkpoints during peak seasons.

Krelling et al. (2017) compared the perceptions and reactions of beach users to stranded litter between second-home owners and non-recurrent tourists. They used a questionnaire to elicit information pertaining to the socio-economic characteristics of tourists, their assessment of the overall beach quality, perceptions of beach litter pollution, hypothetical scenarios of marine litter pollution and deterrence, and potential alternative destinations in the case of deterrence. In total, 319 questionnaires were completed at two Brazilian sub-tropical beaches, one being an open-ocean beach (Ipanema) and the other being an estuarine beach (Pontal do Sul). In terms of the profile of respondents, they found a similar number of respondents who were second home owners and tourists, and noted that there were higher second-home owners at the open-ocean beach than the estuarine beach. Additionally, Krelling et al.'s (2017) results show that most respondents were from middle and upper income groups and educational levels differed between the two beaches and user groups.

Dicken and Hosking (2009) undertook research within the Aliwal Shoal Marine Protected Area in South Africa's east coast to assess the socio-economic aspects of the tiger shark diving industry. They interviewed 197 divers. In terms of the socio-economic profile of the divers interviewed, they found that the majority were overseas visitors to South Africa from 19 countries. Furthermore, their results reveal that almost all the divers were white and male with an average of 39 years in relation to age. Additionally, in relation to income status, Dicken and Hosking (2009) indicate that more than a third of the respondents were professionals. They also found that the average number of days divers spent in the Aliwal Shoal Marine Protected Area was 3.8 days.

Geldenhuys and van der Merwe (2014) assessed the impact of the Blue Flag status on tourist decision-making when selecting a beach. Part of their research included determining visitor profiles in six beaches in the Margate area in KwaZulu-Natal. Among the 572 surveys used, the profile of beach visitors showed that the majority were female and most were also married. Additionally, most respondents were from Gauteng (KwaZulu-Natal's main domestic tourism market) with post-matric qualifications. They also found that overnight visitors on average stayed for 8 nights and the groups respondents travelled in ranged from 4-6 people. Furthermore, they visit the area between 1 and 3 times a year.

Lucrezi et al. (2016) examined visitor profiles in their study of sandy beaches in the Western Cape, South Africa. Visitor/ beachgoer surveys were conducted at seven recreational beaches which had similarities (for example, they were characterized by a Mediterranean climate and they were urban) and differences (for example, some beaches were exposed and others were embayed as well as some were located in marine protected areas and others were not). Four hundred and ninety six (496) self-completed surveys were used. Lucrezi et al.'s (2016) study results reveal that the participants in the beach survey were mostly female, employed or students, between 27 to 40 years old on average, well-educated with post-matric qualifications, and mostly single or married. The average earning among the beachgoers surveyed was R260 000 (US$23 700) per year. In terms of nationality, the beachgoers surveyed were generally South Africans from the Western Cape, except for Clifton beaches (key tourist destination in Cape Town) were the beachgoers were mainly foreign visitors. The beaches in Cape Town were mainly frequented by overnight and day visitors from out of town while beaches further away from the city center were mainly visited by local residents. Surveyed participants either stayed in own accommodation or in a rented house.

Lucrezi et al. (2016; 2018) indicate the usefulness of visitor data to assist in the management of recreational sandy beaches in South Africa. Lucrezi et al. (2018) specifically collected data through self-administered questionnaire surveys which included information on socio-demographic profiles, travel motivations, beach selection criteria and an evaluation of the state of the beach. The research was undertaken in South Africa at twelve recreational sandy beaches with different urbanization levels. In total, 953 surveys were completed and returned. Lucrezi et al.'s (2018) study reveal that there is variability in the profile and perceptions of the beachgoers according to urbanization and geographic location of the beaches. They also found that user views correlated with actual scenarios encountered on the beaches under study which further reinforce the values of user data in assisting sandy beach management.

Birdir et al. (2013) and Rodella et al. (2019) argue that understanding visitor demand and profiles as well as willingness to pay for the conservation of coastal and marine resources is important to examine (and predict) CMT environmental impacts and pressures on the natural resource base. Eagleton and du Plessis (2019) examine the profile and travel motivations of 1 100 beach visitors in seven beach locations during 2016 and 2018 in South Africa's three key coastal tourism

destinations. They found that the status and the setting of the beach were the main motivations which includes the Blue Flag status of the beach, which is also noted by Capacci et al. (2015) as discussed later.

Li et al. (2019) surveyed visitors before and after tours to Molokini Shoal Marine Life Conservation District in Hawaii. On-site face-to-face interviews were undertaken pre- and post-trip with scuba divers and snorkelers. The pre-trip sample size was 712 and the post-trip sample size was 423. In total, almost an equal proportion of the respondents were male and female with more males being scuba divers while more females were snorkelers. The average age of the respondents was 40 years with no significant differences between snorkelers and scuba divers. Additionally, 81% of the respondents were first time visitors with more scuba divers being repeat visitors than snorkelers. They focused primarily on the impacts of scuba diving and snorkeling which can have direct impacts on the environments (such as trampling reefs) and affect experiences of other users because of behaviors that cause conflicts. In terms of environmental impacts, Li et al. (2019) state that some characteristics of participants that can lead to these impacts include poor buoyancy, weak swimming ability, inappropriate training, lack of awareness, and minimal experience. They showed that marine tourism can also cause experiential impacts because some participants behave in ways that are viewed as unacceptable by others, indicating that conflict among user groups is one experiential impact that can occur as areas become popular. Munro et al. (2019) also note the importance of understanding different stakeholder needs and interests as well as potential points of conflict. They specifically state that multiple stakeholders with potentially conflicting values, uses and development priorities can pose planning and management challenges. Similar sentiments are expressed by Prati et al. (2016) who state that conflicting interests, goals, and values often shape the stakeholders' positions concerning coastal erosion management strategies. Peña-Alonso et al. (2018) indicate that the management of beaches as a natural and economic resource is important which includes meeting the needs of the different types of users who visit them. Munro et al. (2019: 487) further assert that "conflict may exist between physical/ economic development and socio-cultural or environmental concerns; local and regional, national or global concerns; and local and touristic meanings, values and significance". Voyer et al. (2017) reveal that resource conflict is a common feature of coastal management.

2.5. CMT visitor perception studies

Examining visitor perceptions have numerous benefits. For example, Martinis et al. (2019) state that understanding visitor profiles and perceptions assists local authorities to develop strategic CMT plans and adapted environmental policies that ensure sustainable practices in these locations. Similar sentiments are expressed by Chen and Teng (2016) who argue that examining and understanding tourists' perspectives and carrying capacity are important to enable sustainable management practices and policies, especially in vulnerable and sensitive CMT destinations. Pereira et al. (2003) assert that the analysis of visitor perceptions is useful to better understand behaviors and preferences on various aspects of the beach such as water quality, environmental quality, marine debris, Blue Flag status, etc. Drabkova (2013) highlights the importance of understanding visitor perspectives towards tourism and related developments to ensure that the industry is managed in a sustainable manner. Kruger et al. (2018) note that in the tourism context, the experience may be recognized as a key to success, innovation and competitiveness. It is also important to recognize that perceptions influence decisions, which in the case of CMT impacts on repeat visitation, word-of-mouth marketing, which destinations travelers choose, how they behave and which activities they participate in; which in turn affects spend at a destination and broader economic impacts.

Romagosa (2018) highlights the importance of visitor perception studies. Although Romagosa's (2018) research focuses on visitors' perceptions and activities in protected areas around Barcelona, the findings are relevant to natural environments generally, including CMT locations. Romagosa (2018) reveals that perceptions of visitors about health benefits is a key aspect of examining the impact of park and green spaces. This links to the recreational and leisure value of CMT destinations and activities as well. Romagosa (2018) states that perception is an important consideration to assess how people use and experience natural environments, and these perceived benefits in turn influences the attractiveness of a destination and societal acceptance. Romagosa (2018) also argues that it is important to examine the associations between visitor characteristics/ profiles, activities they partake in and perceptions, which this study does.

Chen and Teng's (2016) study, which examined tourists' perceptions, also reveals that beach cleanliness, safety, information provision, sediment and habitat management, and overcrowding were considered important by tourists, which indicated the areas of priority for actions. They conducted visitor surveys with 465 visitors in a beach in the Kenting National park in Taiwan. The questionnaire focused on three aspects: visitor profiles, visitors' sense of overcrowding and tourists' attitudes toward potential management options. They also indicated that critical social and biological thresholds exist, above which amenity values that affect experiences and perceptions may be reduced and negative biological impacts may become significant. Blignaut et al. (2016) also note amenity values such as beach and ocean views, recreation and sport opportunities and facilities, and attractions in their study examining perceptions among beach visitors in Abu Dhabi. Thus, the experiential dimension cannot be ignored and visitor perceptions therefore become an important aspect to consider. As Daily (2000) states, it is necessary to consider the perceptions of users since the management of recreational ecosystem services (associated with CMT) depends on how they are perceived by people.

Towner (2016b) argues that sustainable marine tourism management is significantly assisted by the involvement of all relevant stakeholder groups including the local community. Towner (2016b) specifically conducted 108 in-depth interviews with surfing tourists, surf operators, government officials and non-governmental organization (NGO) employees to assess their perceptions towards surfing tourism in Mentawai, Indonesia. The results indicate that surfing tourists, resort and charter boat operators, and the local community perceived that the current management of the Mentawai surfing tourism industry was inadequate at protecting the marine resources it was based on. Towner (2016b) specifically reveals that stakeholders identified entrenched government corruption as the main cause of the failure of the current surf tourism management scheme. Additionally, Towner (2016b) states that coordination of government resources, securing the trust of stakeholders and incorporating local community knowledge into the management framework are viewed as the major barriers to the effective management of the Mentawai Islands surfing tourism industry. A limitation of the study that Towner (2016b) identified was that perceptions of stakeholders were recorded throughout the four months of the high surfing season when concerns of management could potentially be dissimilar from the off season. Towner (2016b) recommends that future research should include data collection during peak and off-peak seasons which this study does.

Joseph (2017) analyzed data based on the perceptions (focusing on economic, socio-cultural, environmental, technological and political sustainability of coastal tourism) of beach visitors and local community members that was collected using questionnaires from five different beach areas of Dakshina Kannada District of Karnataka. Joseph (2017) developed a model for sustainable coastal tourism testing for its fitness using structural equation modelling.

Corbau et al. (2019) examined tourist perceptions of two pocket beaches at Asinara Island in Italy to establish carrying capacity. The method they used was a tourist perception assessment of 637 website reviews, specifically from TripAdvisor. They examined overall satisfaction, environmental aspects, transport means, and service and management aspects. In relation to carrying capacity, they looked at the interaction of human activities with the environment, focusing specifically on biophysical characteristics, social aspects and management components. Corbau et al. (2019) found that tourist carrying capacity is at its lower level and that tourist perceptions and experiences at the beaches were positive.

Drius et al. (2019) assessed people's perception towards natural dune habitats along the Adriatic coastline by means of questionnaires distributed to beach users. The questionnaires included questions to characterize interviewees' profiles (gender, age, education level, place of residence and profession) as well as Likert questions using the categories 'not important', 'scarcely important', 'important', 'very important', and 'I don't know' to illicit perceptions about the natural habitat. The responses indicated that most respondents, irrespective of their demographic profile, rate natural features as important or very important.

As indicated earlier, Dicken and Hosking (2009) examined socio-economic aspects of the tiger shark diving industry within the Aliwal Shoal Marine Protected Area in South Africa's east coast, focusing on participant expectations, experiences and expenditure. They administered a semi-structured survey with 197 divers. They found that most respondents rated the dive and 'tiger shark experience' as enjoyable and excellent. Furthermore, close to half of the respondents would not visit the Aliwal Shoal Marine Protected Area if they could not dive with tiger sharks which reinforces the importance of this CMT activity as a tourist attraction. Additionally, Dicken and

Hosking (2009) found that most divers were willing to pay to ensure that tiger shark diving remains an activity in the area.

In several studies, safety and security concerns emerge as a key issue raised among visitors and local residents. For example, Ahmed et al. (2008: 81) found in their study that the main negative perceptions of Durban as a beach tourism destination among visitors were "a combination of perceptions of crime and personal safety and 'tired' products", while strengths were identified as "its natural environmental attributes and its unique cultural qualities". While visitors focus on safety and security at destinations, broader considerations are raised by Walker (2018) who states that South Africa's geographic 'gateway' location places unique demands upon it to provide maritime safety, security and governance for itself and others. Potgieter (2018) also expresses similar sentiments, stating that maritime security is an inherent part of national security, human security, marine safety, and economic development agendas in South Africa. Potgieter (2018) further indicates that the link between maritime security and blue economy growth as articulated in Operation Phakisa is evident, for example, environmental degradation fuels insecurity, especially in contexts where poverty and marginalization of coastal populations stimulate illegal activities and radical behavior. Potgieter (2018) underscores that sustainable blue economic growth in the maritime sector is challenging without maritime security as ocean resources need to be protected (as well as maintained and monitored). Potgieter (2018) emphasizes the importance of proper oceans governance.

New drivers are emerging that influence visitor perceptions and preferences in relation to CMT. Meyer-Arendt (2018) notes that there is increased focus in published research on coastal tourism on climate change impacts, particularly concerns in relation to global warming and sea level rise. Atzori et al. (2018) show how climate change is shifting perceptions of tourist destinations from predominant concerns previously relating to beach comfort, and now an increasing focus on apprehensions associated with coastal habitat destruction and diseases linked to climate change which are influencing why and where people travel. This is because climate and the natural environment are the main attractions for CMT. Weatherdon et al. (2016) also state that climate change-induced changes (including loss of beaches, changes in the abundance and composition of marine biodiversity, coral bleaching, etc.) will affect the main components of the tourism industry

such as tourists' preferences, tourism strategies, and the transportation sector. Gössling et al. (2012: 37) state:

> Understanding tourist perceptions and reactions to the impacts of climate change is therefore essential to anticipating the potential geographic and seasonal shifts in tourism demand, changes in specific tourism markets, and the overall competitiveness of businesses and destinations.

Seasonality is examined by Peña-Alonso et al. (2018) who specifically looked at user perceptions of beach characteristics and management in Summer and Autumn seasons in the Gran Canaria Island in Spain. They asserted that in relation to CMT in temperate zones in particular, the increased demand for activities on the beaches and their surroundings are concentrated in the summer season while in warm regions (such as the Gran Canaria Island) there are differences in the annual flow of visitors in relation to their place of residence (local, national and international) and the intensity of their arrival. Peña-Alonso et al. (2018) sought to analyze the feedback from 1 175 user surveys conducted during Summer and Autumn at twelve beaches (four urban beaches, four semi-urban beaches and four natural beaches) on Gran Canaria island. Specifically, they examined perceptions in relation to the importance of the characteristics of the beaches (cleanliness, landscape, comfort, guarding and safety, recreational offer, quietness, access and parking areas, proximity, services and nature) and the impacts, as well as the positive bio-physical, economical, and social aspects. They found that during both seasons the most important characteristic was cleanliness of the beach while the least important was recreational offer. They did, however, note seasonal differences in relation to user profiles and preferences.

Atzori et al. (2018) stated that of all tourism stakeholders, the tourists themselves have the greatest capacity to adapt to the impacts of climate change. Becken and Hay (2012) argued that tourists have three resources (money, knowledge and time) which, if available, provide them with options and the freedom to avoid locations with unfavorable climatic conditions and those impacted by climate change. Tourists, Becken and Hay (2012) assert, also have the opportunity to change the timing of their trip to avoid unfavorable weather conditions. Atzori et al. (2018) state that it is

therefore important to examine tourist perceptions to better understand their responses to changes and adaptation measures they are likely to embrace.

Rutty and Scott (2015) stated that coastal tourism is the largest market segment of global tourism which is strongly affected by a destination's thermal climate. Their study examined tourist perceptions of outdoor microclimatic conditions in coastal environments while also identifying important psychological factors. The study was undertaken at several Caribbean beaches in the islands of Barbados, Saint Lucia and Tobago where micrometeorological measurements were taken together with a questionnaire survey which was used to examine the thermal comfort of subjects. Specifically, 472 beach users were interviewed. The results reveal that most beach users would not change the thermal conditions while some preferred warmer weather conditions. Rutty and Scott (2015) also showed that beach users' thermal preferences were higher than the preferred thermal conditions identified in outdoor bioclimatic studies from urban park settings which indicate that beach users hold different comfort perceptions and preferences when compared to people using urban spaces.

Gössling et al. (2016) examined ex post weather experiences and their importance in destination image perceptions and future travel planning behavior among tourists in Austria, Germany and Switzerland. In this exploratory study, a sample of 50 tourists and residents were interviewed using a semi-structured survey instrument. Gössling et al. (2016) state that although the importance of weather for tourism is widely recognized, no research had addressed weather events from retrospective viewpoints or studies that look at the role of extreme weather events in longer-term holiday memories. Their results show that although weather events do not dominate long-term memories of tourist experiences, these events are important in shaping a destination's image with rain events being the single most important weather variable that negatively influences perceptions. They also found that experiences of weather events perceived as extreme have an emotional dimension which were generally associated with negative connotations such as annoyance, irritation, fear and anger. Gössling et al. (2016) further assert that the emotional intensity of experiences may have immediate (cancellation before a vacation, spatial substitution that entails going to another location or abandoning going on holidays) and longer-term (higher degree of preparedness, temporal substitution which includes postponing a trip, spatial substitution

and no repeat visitation to the destination) tourist responses. The importance of weather in framing perceptions among tourists is likely to increase in the context of climate change.

Fitchett and Hoogendoorn (2018) also look at the relationship between weather and tourism in South Africa, specifically analyzing factors affecting tourists' accounts of weather. They also agree with Gössling et al. (2016) that there is consensus in tourism research that tourists are sensitive to weather at a specific destination which influences the selection of a destination, the timing of the visit and the enjoyment of the destination. Fitchett and Hoogendoorn (2018) examine how the country of origin of tourists, the anticipated climatic conditions and the infrastructure in tourist accommodation establishments and attractions influence the sensitivity of tourists to the climate of a destination. Methodologically, they used commentary on climatic factors in TripAdvisor reviews for a selection of 19 locations in South Africa. They found that the sensitivity of tourists to climatic factors varied according to the country (or province in the case of domestic tourists) of origin of tourists, the quality of the accommodation establishment that they stayed in and the seasonality of their visit. Fitchett and Hoogendoorn (2018) argue that an improved understanding of the climatic sensitivity of specific tourist groups and climatic challenges in tourist accommodation establishments will contribute to improved adaptation to climate change threats to the tourist sector.

Perceptions studies also examine visitor attitudes towards location quality. Snider et al. (2015: 48) state:

> When demand for access to the beach exceeds the available infrastructure capacity, then unacceptable impacts may result, affecting not only the coastal resources themselves, but also the quality of the recreational user experience. If these impacts prove to be substantive, then repercussions to the economic base of coastal economies may occur as prospective tourists select alternate destinations.

Penn et al.'s (2016) study in Hawaii looked at preferences among residents and tourists of aspects such as sand quality, littering and debris, swimming conditions and levels of safety, water and natural resource quality, and congestion levels. They also show that these aspects influence

visitors' willingness to pay to protect, maintain and improve the conditions of beach locations. These factors, Penn et al. (2016) argue, also influences preferences about which beach location to visit, thereby impacting on economic impact as well. Capacci et al. (2015) undertook research in Italy to examine how Blue Flags and other eco-labels affect tourism in CMT locations and consumer behavior. They state that eco-labels (with Blue Flags being the most well-known) are indicators of the quality of the beaches in relation to environmental aspects, facilities and infrastructure, and social dimensions such as safety and security. Fraguell et al. (2016) and Slater and Mearns (2018) also state that eco-labels such as Blue Flags are an important tool within the tourism industry to ensure effective management and to limit negative impacts on the environment by promoting sustainable development. Capacci et al. (2015) found that the status of the beach influences tourism, especially among foreign tourists.

Slater and Mearns (2018) focus on perceptions and activity profiles of Blue Flag beach users in South Africa. They indicate that the Blue Flag program has been implemented in South Africa for 17 years in three main CMT provinces (Western Cape, Eastern Cape and KwaZulu-Natal). Their study was the first to ascertain the preferences and reasons beach users select certain Blue Flag beaches to visit. They collected data via questionnaires and observations. Beach users were asked to provide preference ratings for the following attributes: clean beach, the actual beach itself, the water quality in the bathing area of the beach, clean ablutions, safe swimming conditions, lifeguards, signage with rules and regulations, parking near the beach, security at the beach, children's play area and close proximity to other shops and services. Slater and Mearns (2018) found that although beach user preferences vary slightly according to province, the top three beach user preferences nationally were clean beaches, the actual beach itself (sense of place) and water quality. The least identified preferences were proximity to shops, children's play area and security. It is important to note that more than half of the respondents identified these aspects as being important although least preferred in relation to the other issues examined in the survey. These are key criteria in achieving a Blue Flag status. Slater and Mearns (2018) further recommend that Blue Flag beach managers/ operators should collect data to better understand their beach users to respond to their needs and improve overall tourist satisfaction.

Snider et al. (2015) examine perceptions of the availability of beach parking and access as predictors of coastal tourism in North Carolina. They indicate that it is not only the actual number of parking spaces at any given location that influences the willingness of tourists to visit and revisit a site, but also their perceptions of parking availability at the site. Their research questions were: whether tourists' perceptions of parking accurately reflect the actual parking condition at a site, and whether prospective visitors' perceptions of adequate public parking and beach access do indeed affect their beach visitation behavior or the intent to visit the public beach. They collected data from both a systematic face-to-face interview of 1 384 visitors at several coastal locations in North Carolina and a random telephone survey of 1 877 residents living in coastal counties. Snider et al. (2015) found that beach visitors' perceptions of parking conditions did not correspond to the actual record of parking availability and parking perceptions did not strongly correlate with visitation patterns. Furthermore, they found that in North Carolina parking served as only a minor incentive to beach visitation.

Krelling et al. (2017) looked at differences in perceptions and reactions of tourist groups to beach marine debris which can influence a loss of tourism revenue in coastal areas. They state that marine debris is the most noticeable and prominent pollutant that makes beaches aesthetically unappealing to users. Krelling et al. (2017) show that beach user groups differed regarding daily expenses, period of permanence per trip and trip frequency. Their study also reveals that the open-ocean beach was rated the worst regarding overall beach quality with marine debris generation being mainly attributed to local beach users in the open-ocean beach while in the estuarine beach location, marine (or non-local) sources were four times more frequently cited. The study also found that perceptions on actual litter pollution and litter deterrence scenarios did not vary between beaches or groups. Almost all the beach goers interviewed avoid a beach based on perceptions of beach litter pollution and most users would choose a neighboring beach destination as an alternative.

Location factors also influence place attachment which affect perceptions of and attitudes towards specific destinations. Tonge et al. (2015) assert that place identity involves the symbolic, spiritual, psychological, and emotional aspects of place. Tonge et al. (2015) state that research reveals that as individuals become attached to a place, they are more likely to protect that place. Their findings

from an on-site visitor survey administered at Ningaloo Marine Park, Australia, reveal how place attachment influences pro-environment behavioral intentions among visitors. These included on-site and off-site actions to conserve the Marine Park (Tonge et al., 2015). Tonge et al. (2015) indicate that research reveals that in the fields of travel, leisure and tourism; place attachment has value in both understanding visitor behavior and natural resource management.

Jarvis et al. (2016) use tourist survey data using the case study of the Great Barrier Reef in Australia supplemented by objective data from secondary sources and found that economic, social and environmental factors affect trip satisfaction which in turn affects the likelihood of a tourist returning. Their study also reveals linkages between tourism and other industries, increased construction work, decreased water clarity and decreased perceptions of tourist safety as key factors that significantly reduce the likelihood of repeat visits thereby impacting on tourist revenues.

Dodd and Holmes (2019) examine factors that satisfy beach tourists and influence them to return. Their research was based on 1 451 surveys conducted at rural and urban beaches across Ontario, Canada. They developed a model for predicting overall beachgoer satisfaction and found that visitor demographics and beach profiles as well as perceptual measures (which were the main factors) such as satisfaction with facilities and the beach were key influencing factors. Dodd and Holmes (2019) conclude that the findings can be used to improve destination management, including better managing visitors' overall satisfaction levels and increasing the likelihood of revisitation.

Lucrezi et al. (2018) state that management challenges for sandy beaches must consider their diversity and their inherent aspects, from environmental to social aspects. Lucrezi and van der Walt (2016) reveal how demography, travelling habits, motivations to visit, and recreational preferences influence visitor perceptions of sandy beach conditions in urban contexts. Lucrezi et al. (2016) also examined visitor profiles in relation to their attempts to develop an assessment tool for sandy beaches in South Africa using a self-completed structured survey. They found that beachgoers generally had a favorable predisposition towards the beaches they visited although satisfaction with infrastructure and services varied among the different beaches. Furthermore, the

results indicate that the main reasons for visiting the beaches were relaxation, socialization, low cost and the weather with other reasons identified being safety, novelty, scenery, contact with nature, lifestyle and well-being. Additionally, the main activities beachgoers participated in were socializing, relaxing, sunbathing, swimming, walking, participating in beach sports, sightseeing and photography. Lucrezi et al. (2016) also note that there was a lower interest in more intrusive recreational activities (for example, motorized recreation, fishing, camping and horse riding) which could be as a result of many of the beaches not offering these activities. The results of these studies indicate the relevance and value of considering users' perceptions as a tool in decision-making processes in Integrated Coastal Zone Management, including promoting conservation and ensuring sustainable practices that maintain the recreational quality of urban sandy beaches.

Pueyo-Ros et al. (2018) examined visitor profiles, recreational uses, motivations and preferences in Costa Brava, a coastal wetland in Spain. They found differences in relation to visitors who stayed in primary homes (staying with friends and relations) and those who stayed in paid accommodation. Visitors also noted recreational activities as the main motivation for visiting the wetlands with passive activities (aesthetic preferences) being more prominent than active activities (running or cycling).

Oh et al. (2010) compare resident and tourists preferences for public beach access and related amenities using the stated preference choice method. They found that tourists were more interested in additional public beach access points and commercial development, while residents supported beach rules and regulations but opposed high levels of crowding and noise. They suggest mechanisms to manage public beach access which includes the utilization of parking fees to subsidize additional public beach access points, identifying appropriate types and levels of commercial development that moderate the use of coastal resources by tourists and day-trip users, and implementing beach rules and regulations that reduce the potential for conflict between different user groups. Their study reveals the importance of disaggregating information pertaining to different user groups. This study interviewed local residents, tourists and day-trippers to unpack differing perceptions and interests. Li et al. (2019) also note conflicts among tourists who value different aspects of settings and experiences with key issues raised being in-group and

interpersonal conflicts (bumping into people and being rude or discourteous) between snorkelers and other users. Visitors surveyed stated that these conflicts interfered with their experiences.

Plieninger et al. (2018) also examine potential points of conflicts in relation to landscape values and development preferences on the Faroe Islands in the North Atlantic ocean. The methodological approach they adopted was linking participatory mapping with narrative analysis techniques to examine landscape values and development preferences to identify the potential for land-use conflicts. Plieninger et al. (2018: 162) identify four narratives that illustrate human-nature relationships in the North Atlantic that reveal "a great appreciation for wildlife and landforms, for peaceful and undisturbed ecosystems, for open access to land and sea, and for people being part of nature as major themes". Their research unearthed a high potential for future land-use conflicts with tourism development having the highest perceived potential for conflicts, with tourism competing with other development activities such as renewable energy and fish farming/ processing. Plieninger et al. (2018) further indicate that while respondents acknowledged the need for new economic opportunities that may create employment and wealth, they were also concerned with the negative effects for nature and society as well as the perceived inability to govern these developments.

Stakeholder perceptions of different aspects of tourism is also a focus of research. Pandy and Rogerson (2018) undertake one such study that investigates the perspectives of key South African tourism industry stakeholders pertaining to the impacts of climate change on tourism. They found that generally stakeholders perceived differences in the impacts of climate change for specific segments of the tourism economy.

2.6. CMT in South Africa

Potgieter (2018: 49) states that "South Africa has a large sea area, abundant marine resources, considerable maritime infrastructure, and the oceans economy is an important contributor to GDP". Bob et al. (2018) state that according to the South African DPME, South Africa's oceans are capable of generating an estimated R129 177 billion to the GDP by the year 2033. In relation

to tourism specifically, they indicate that this sector has been acknowledged as one of the biggest key economic sectors in the country which continues to receive considerable growth. In relation to CMT, Potgieter (2018) argues that CMT is a large and well-established industry in some of the coastal regions in South Africa because the country is endowed with a long and scenic coastline, and a good infrastructure along much of the coast. South Africa has a coastline of more than 3 000 km which is a key destination for tourists and locals (Seymour, 2012). Statistics South Africa (2019) shows that in 2018, 94.9% of all foreign arrivals into the country were for holiday/ tourism purposes. Statistics South Africa (2019) also indicates that domestic tourists in South Africa is growing annually, with 11 961 401 domestic travelers in 2018 compared to 11 508 449 in 2017, mainly to visit friends and family, holiday purposes and religious motives with the coastline being key tourist destinations.

Operation Phakisa, as indicated in the previous chapter, is a national initiative started in 2004 that is aimed at unlocking South Africa's blue economy potential. Findlay (2018) argues that while oceans economies are relatively well defined in the literature, despite differences in their scope in relation to the range of activities and geographic range across nations, the blue economy term is used differently. For example, Spalding (2016) states that the blue economy refers to the economic activities associated with the oceans to create economic health while also ensuring that the goals of sustainable development are achieved. Pauli (2010) asserts that the blue economy describes innovative business approaches to environmental challenges.

Phakisa means "fast" or "hurry up" and Operation Phakisa is a program (a Department of Planning, Monitoring and Evaluation initiative launched in 2014) intended to have fast results by bringing together key stakeholders to engage in intensive planning to leverage the potential of South Africa's coastal and ocean resources (Operation Phakisa, 2014). Findlay (2018: 248) asserts that Operation Phakisa "based on the Malaysian Government's 'big fast results methodology', follows a results-driven approach which includes the establishment of targets and associated public accountability in their attainment". The Institute for Global Dialogue (2016) states that Operation Phakisa was fashioned after the Malaysian marine cadastre conceptual model. Abdullah et al. (2013) indicate that the marine cadastre is a marine management system that considers special

rights, restrictions and responsibilities for marine and coastal activities. Operation Phakisa initially had four focus areas (Operation Phakisa, 2014):

- Maritime transport and manufacturing (led by the Department of Transport): focuses on how the maritime transport and manufacturing sector can grow over the next five years in order to create jobs and increase contribution to the GDP.
- Aquaculture (led by the Department of Agriculture, Forestry and Fisheries): to assess how South Africa's aquaculture can lead to the development of new and existing farms to create approximately 5 500, generating a collective value of R1.5 billion.
- Marine protection services and ocean governance (led by the DEA): implementation of a tool to involve stakeholders to draft the execution and monitoring of an integrated approach to oceans planning as well as to develop an instrument to ensure that governance and enforcement is carried out.
- Offshore oil and gas exploration (led by the Department of Mineral Resources): aims to unlock the capabilities of South Africa's offshore oil and gas for economic gain.

Operation Phakisa (2015) added two more focus areas at the oceans economy review workshop held:

- CMT (led by the National Department of Tourism): to focus on initiatives within the coastal tourism space to analyze the contribution and potential contribution of CMT to non-urban communities.
- Small harbors (led by Department of Public Works): focuses on the potential for harbor infrastructure as well as the development of the precincts of small towns with expectations of the creation of 12 000 jobs and a substantial contribution to the GDP.

Operation Phakisa (2014) also identifies two enablers to support the implementation process: skills and capacity building as well as research, technology and innovation. To ensure that these interventions are appropriate and address limitations or challenges in relation to the focus areas identified above, it is important to better understand the status quo and the needs of the specific area. In CMT specifically, understanding visitor profiles and demands become key for proper planning.

The ocean's economy potential is unlikely to be realized if the key challenges identified are not addressed which includes focusing on CMT products and assets (including diversifying the product and event portfolio), marketing strategies that effectively target domestic and international tourists, and encouraging broader participations of and investments from the private sector. The importance of effective marketing is also highlighted by Hung and Petrick (2011) who underscore the need to better understand the market in South Africa for CMT, why people travel to the coast and what visitors desire from their trip. This reinforces the need to pay more attention on research that examine visitors profiles and perceptions as this study does.

Rogerson and Rogerson's (2020) research is the first to systematically map out the size, characteristics and spatial distribution of coastal tourism in South Africa by investigating the 15 district and metropolitan municipalities that adjoin the national coastline. They find that the contribution of coastal areas to South Africa's tourism economy is in relative decline and is geographically concentrated in two major coastal metropolitan areas (Durban and Cape Town). In addition, Rogerson and Rogerson (2020) note different geographies are revealed for different types of tourism, specifically in relation to leisure versus business or visiting friends and relatives travel as well as for domestic compared to international travel. They assert that in South Africa, coastal tourism is polarizing and is increasingly an urban phenomenon, arguing that the uneven geographical impacts of coastal tourism raise a number of policy concerns about the need for strategic interventions to spread more widely the impacts of coastal tourism in the country. The geographical differences highlighted by Rogerson and Rogerson (2020) further reinforce the importance of undertaking a provincial comparative study.

2.7. Conclusion

The literature review reveals the growing importance of CMT globally and nationally as well as the increasing prominence of water-dependent (especially coastal/ beach) recreational activities. CMT is also one of the biggest and oldest sub-sectors of tourism. CMT comprises a variety of different types of tourism, leisure and recreational activities that attract residents and visitors from outside the CMT areas to these destinations.

Different definitions of CMT are discernible in the literature with a common aspect, however, being tourist visitation to coastal and marine areas as well as associated recreational and leisure activities linked to coastal and oceans ecosystems. Research also underscores that the profile and demands of visitors to CMT locations can have socio-economic and environmental impacts. While there are numerous studies that examine CMT visitor profiles (focusing primarily on tourists) and perceptions of locations and experiences (as indicated in the introductory chapter as well), very few studies use the comparative lens which this study adopts. Additionally, studies do not assess regional or national profiles which is also a contribution of this study. The next chapter presents the methodological approach used to guide this research.

CHAPTER THREE
METHODOLOGY

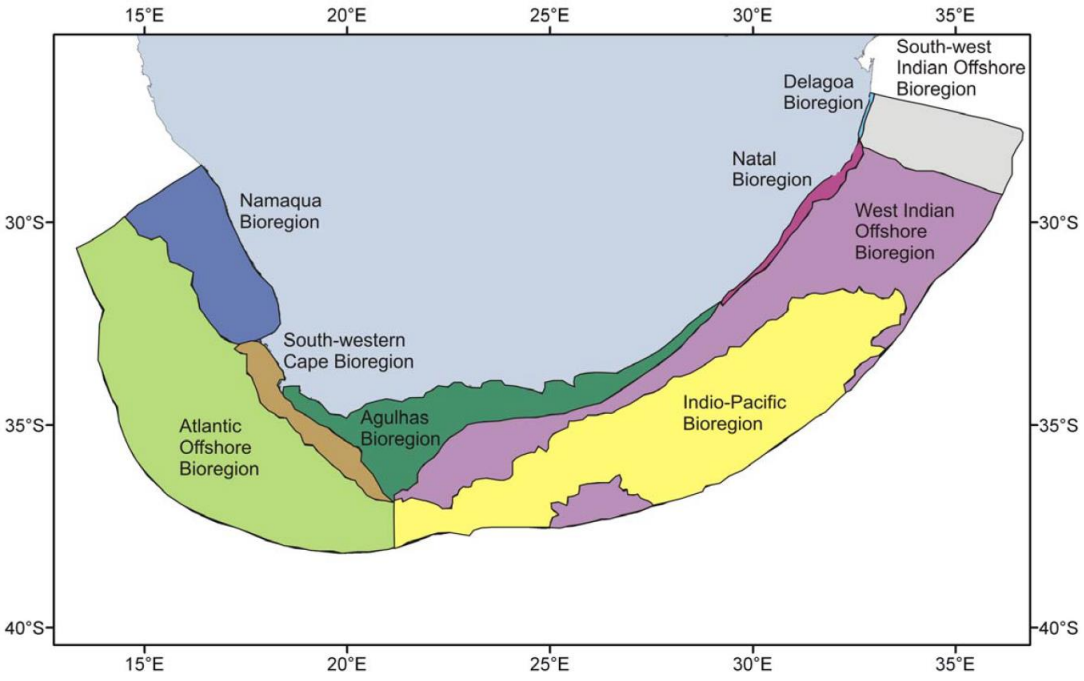
3.1. Introduction

This chapter presents the methodological approach adopted in this study. Firstly, a description of the South African CMT landscape is provided as a background to the case study. Additionally, a brief overview of the coastal locations and CMT resources in each of the provinces (Eastern Cape, KwaZulu-Natal and Western Cape) is presented given that this study undertakes a comparative analysis. The quantitative survey approach is then discussed together with the specific data collection instruments employed and the sampling approach.

3.2. Description of study area

The Republic of South Africa (2019) states that South Africa occupies the most southern tip of Africa with its coastline stretching more than 3 000 km from the desert border with Namibia on the Atlantic coast southwards around the tip of Africa and then north to the border of sub-tropical Mozambique on the Indian Ocean. Continental South Africa has a coastline of approximately 3 650 km and an Exclusive Economic Zone (EEZ) of over 1 million km^2 (Griffiths et al., 2010). They further indicate that South Africa has a recorded marine biota of at least 12 914 which makes it one of the most marine biodiverse locations in the world. Additionally, Griffiths et al. (2010) assert that South Africa has 343 estuaries along its shoreline with 292 of these along the wetter Indian Ocean coastline (that is, in KwaZulu-Natal and the eastern parts of the Eastern Cape). The vast coastline and biodiversity results in numerous CMT attractions. This is also reflected in relation to South Africa's nine biodiverse regions as identified by Lombard (2004) cited in Griffiths et al., 2010: 4), shown in Figure 3.1.

Figure 3.1: South Africa's nine biodiverse regions (Lombard, 2004 cited in Griffiths et al., 2010: 4)



Fitchett and Hoogendoorn (2018: 2161) state that South Africa is "situated at the sub-tropical-temperate boundary, spanning coordinates of 22–35° S and 17–33° E". They further assert that the climate is influenced by the warm Indian Ocean Agulhas Current to the east and the cold Atlantic Ocean Benguela Current to the west. Griffiths et al. (2010: 1) also indicate that the "oceanographic regime around South Africa is dominated by two major current systems: the cold Benguela Current along the Atlantic coast to the west and the warm Agulhas Current along the Indian Ocean coast to the east". The Republic of South Africa (2019) indicates that the warm Mozambique-Agulhas Current skirts the east and south coasts as far as Cape Agulhas, while the cold Benguela Current flows northwards along the west coast as far as southern Angola. This is the main reason why the coastal waters in the eastern shoreline is warmer than the western shoreline. The Republic of South Africa (2019) further assert that this contrast in temperature between these two currents partly accounts for significant differences in climate and vegetation, as well as differences in marine life. Fitchett and Hoogendoorn (2018) also state that differences in latitude, topography and the effect

of the urban heat island is also responsible for the variations in climate as well as coastal and marine biodiversity. From a CMT perspective, these differences result in different types of CMT locations and opportunities which increase South Africa's attractiveness as a CMT destination. Fitchett and Hoogendoorn (2018) also indicate that temperatures are more moderate along the coastal boundary of the country than the interior (where temperatures frequently exceed 30 °C in summer months and drop below 0 °C during winter nights), which also contribute to the attractiveness of South Africa's coastal areas.

Griffiths et al. (2010) state that ecotourism based on South Africa's marine environment has increased substantially. They identify the most noteworthy marine tourism activities as shark, whale and dolphin watching which have expanded rapidly. They specifically indicate that along the south coast (mainly the Western Cape and some parts of the Eastern Cape), a thriving industry exists in relation to boat-based viewing and cage diving with great white sharks while the KwaZulu-Natal coast's number of shark species and large pods of dolphin attract both domestic and foreign tourists. Additionally, they indicate that tourists (and local residents and day visitors from out of town) make use of the South African coast for a range of leisure and recreational purposes.

Post-apartheid, South Africa was divided into nine provinces (Eastern Cape, Western Cape, Northern Cape, Mpumalanga, Limpopo, Gauteng, Free State, KwaZulu-Natal and North West). Four of these are coastal provinces (Eastern Cape, Western Cape, Northern Cape and KwaZulu-Natal). However, as Bob et al. (2018) state, the Northern Cape has limited CMT attractions. Among the rest of the provinces, each has unique coastal and marine ecosystems, characteristics and attractions/ activities which offer a range of opportunities for visitors (including tourists, day-trippers and local residents). They further identify the main CMT activities in South Africa as on the beach recreational and leisure pursuits, swimming, surfing, snorkeling, scuba diving, whale watching and shark cage diving.

The Eastern Cape has various coastal routes which include the Wild Coast, Sunshine Coast, Tsitsikamma adventure route as well as coastal parks such as Hluleka, Dwesa, Mkhambathi and Silaka (Eastern Cape Parks and Tourism Agency. 2019). Hamann and Tuinder (2012) indicate that

the Eastern Cape has numerous coastal attractions and activities including hosting Africa's largest surfing contest, home to the Bird Islands which is a cluster of four islands 62 km from Port Elizabeth that are key seabird breeding grounds for southern Africa's largest gannetry (about 65 000 breeding pairs of Cape Gannets) and over 10 000 African Penguins, and has the most estuaries compared to any other province. Hamann and Tuinder (2012) further state that the climatic conditions of the Eastern Cape's coastal areas lie between the sub-tropical conditions prevalent in KwaZulu-Natal and the Mediterranean climate of the Western Cape. The main cities/ towns along the Eastern Cape's shoreline are indicated in Figure 3.2 which include Jeffreys Bay, Port Elizabeth, Port Alfred, East London and Port St Johns.

Figure 3.2: Map of the Eastern Cape (SA Places, 2019a)

Shanganlall et al. (2019) state that KwaZulu-Natal's coastline is one of the most densely populated coastlines in Africa and has been subjected to human developments over the last 18 years. KwaZulu-Natal is well known for leisure and recreational beach activities given its warmer beaches and higher temperatures, scuba diving in Sodwana Bay and the annual sardine run. The Republic of South Africa (2019) further states that the annual sardine run is the biggest migration on the planet. KwaZulu-Natal, because of its warmer beaches, is also South Africa's main domestic tourist destination. According to Tourism KwaZulu-Natal (2019), the Indian Ocean averages temperatures of 21 ^{0}C and the sub-tropical climate makes KwaZulu-Natal's coastal areas ideal for outdoor CMT activities including sun bathing, beach combing, swimming, surfing, fishing, sailing, snorkeling and scuba diving. KwaZulu-Natal also has the iSimangiliso Wetland Park which is a UNESCO World Heritage Site while the Western Cape also has Robben Island which is also declared a World Heritage Site as a result of its cultural and political historical significance (houses the prison where Nelson Mandela spent 27 years of his life) as well as its environmental importance. Tourism KwaZulu-Natal (2019) states that for travel purposes, the province is divided into eight regions (Durban, the South Coast, the North Coast, Pietermaritzburg and the Midlands, the Drakensberg, the Battlefields, Zululand and the Maputaland or Elephant Coast). Each of these areas has its own unique characteristics and attractions. Off the eight, four are coastal regions (Durban, the South Coast, the North Coast and Maputaland or Elephant Coast). Figure 3.3 indicates the main cities/ towns in KwaZulu-Natal include Durban, Sodwana Bay, St Lucia, Richards Bay, Salt Rock, Ballito, Umdloti Beach, Umhlanga Rocks, Amanzimtoti, Port Shepstone and Port Edward. It also shows the main reserves and parks along the coast.

Figure 3.3: Map of KwaZulu-Natal (SA Places, 2019b)

Accommodation South Africa (2019) states that the Cape West Coast has numerous unspoilt beaches and biodiversity. Additionally, the mountain ranges make the coastal areas one of the most scenic attractions in the world with views from Table Mountain being a key tourist attraction. In terms of provincial specific attractions, the Western Cape is well known for its whale route and world class whale watching experiences as well as shark cage diving. The Republic of South Africa (2019) indicates that cold waters of the west coast (being much richer in oxygen, nitrates, phosphates and plankton) compared to the east coast makes the Western Cape South Africa's main fishing province and destination for marine animal (whales, sharks, dolphins, seals, penguins, etc.) viewing. The map of the Western Cape (Figure 3.4) indicates the main coastal cities/ towns (including Cape Town, Saldanha, Hermanus, Gansbaas, Mossel Bay, George, Knysna and Plettenberg Bay). Additionally, the Figure indicates that much of the Western Cape's coastal areas are conserved as national parks and nature reserves.

Figure 3.4: Map of the Western Cape (SA Places, 2019c)

3.4. Research design

As indicated in Chapter One, the data used for this research was part of a larger NDT commissioned study where UKZN was the lead university to develop a framework to assess the economic impacts of CMT in South Africa. Selected findings were used in this study that relate to visitor profiles, behaviors and perceptions. Ethical approval (Appendix 2) for the study was obtained from UKZN and included informing persons participating in the study about the scope of the research, how the results will be used (including for academic purposes) and covered assurances that respondents will remain anonymous. Additionally, they were informed that they had a choice not to participate and could withdraw from participating at any time. Only adults (over 18 years old) participated in the study. The researcher was part of the team involved in the study which included participation in the design of the visitor survey instrument, undertaking field-based data collection (especially in KwaZulu-Natal), data inputting for all provinces and assistance

with the generation of Tables and preliminary analysis. It is important to note that the NDT study focused on aggregating data nationally while this study adopts a comparative provincial lens, focusing on visitor profiles as well as behaviors and perceptions of CMT that was not done previously.

This study adopts a quantitative research design. McCusker and Gunaydin (2015) state that quantitative research seeks to measure, count and statistically analyze selected aspects of a particular study. They further indicate that quantitative research addresses the 'how many'/ 'how much' questions which permit generalizations to be made. The ability to generalize findings from quantitative data is also supported by Creswell (2014). Additionally, Creswell (2014) asserts that the quantitative approach entails the use and analysis of numbered data that permits an examination of the relationships between variables that is intended to objectively measure and uncover information on a specific topic or aspect using predetermined (and predefined) instruments. Subedi (2016) further indicates that quantitative data and results provide a general picture of the research problem which in this study entailed undertaking a provincial level comparative analysis of CMT visitor profiles and perceptions of CMT locations.

Ndanu and Syombua (2015) note that quantitative research is based on validation. Scientific research entails concerns over validity and reliability. Babbie (2007), Leedy and Ormrod (2005) and Onwuegbuzie and Johnson (2006) assert that validity and reliability in data collection is improved when prior to implementation, the measurement procedures and instruments (in this study the CMT visitor survey) are developed using acceptable levels of checks to ensure that the empirical measure of a specific variable adequately reflects the concept and the meanings are common and well understood (validity), while reliability refers to an instrument measuring the same outcome more than once with similar outcomes being achieved. As part of a larger study, the survey instrument for this research was developed in consultation with the NDT and the project also included a piloting phase which was undertaken in 2017 at purposively selected beach locations in Cape Town, Durban and Port Elizabeth which are the main CMT cities in Western Cape, KwaZulu-Natal and Eastern Cape, respectively. This phase was important to refine the survey questions and was critical in ensuring validity and reliability. Additionally, information was not fabricated or falsified.

3.4.1. Case study approach

This study adopts a case study approach, specifically focusing on CMT locations in South Africa. Additionally, it is important to note that within the three CMT provinces, specific beach tourism locations were purposively chosen where visitor surveys were conducted. These locations were selected based on tourist attractions and these areas are known to attract visitors. A case study, according to Hancock and Algozzine (2016), permits the collection of data which contributes to analyzing and describing context-specific details of particular places and at a certain time.

The main focus of this study is to undertake a provincial comparative analysis to address the research questions below that are linked to objectives of the study which were presented in Chapter One:

- What are the socio-economic profiles (in relation to age, gender, educational level, income, population group and place of residence) of CMT visitors?
- What type of visitors (overnight visitor, day visitor or local resident) frequent CMT locations?
- What are the spending patterns among CMT visitors in relation to CMT products/ activities, merchandise, food and drinks, transportation, accommodation and overall spend?
- What types of CMT products/ activities are being consumed and/or what types of CMT activities are visitors participating in?
- What are the main reasons for visiting specific CMT locations?
- What types of CMT products would visitors be interested in consuming in the future?
- How do visitors perceive the CMT destination/location?

3.5. Data collection instrument and data analysis

The questions on the survey were close-ended with a few questions including a 'specify, if other', option. This approach was used when constructing the questionnaire since, as Creswell (2014) states, close-ended questions with limited options command focus including an 'other (specify)' option permits respondents to provide responses that were not included. The questionnaire (Appendix 1) which was used to collect the data comprised of five sections. Firstly, a screening question was used to establish whether persons approached to take part in the study participated or planned to participate in CMT activities during their visitation to the specific location where the research was being conducted. The next section focused on visitor profile information which included questions on the following:

- Whether the respondent was a local resident, a day visitor or overnight visitor.
- Place of residence of respondent.
- Immediate group size of respondent, that is, number of persons accompanying interviewee that spend money together.
- CMT activities respondents participated in or would have participated in during the visit when they were interviewed. Additionally, respondents were asked which CMT activities they would be interested in participating in, in the future.
- Other activities respondents participated in or would have participated in during their visit to the CMT location.
- Number of times respondents previously participated in CMT activities in South Africa.
- If respondents would advise friends, relatives or colleagues to participate in CMT activities in South Africa.

The next section included questions on consumer expenditure behavior. This study specifically used responses to establish which categories visitors spent money on. Additionally, questions were asked pertaining to what was the primary reason for visiting the location where the interview was held, the number of nights overnight visitors spend in the town where interview was held and in South Africa, and the type of transport respondents used from their place of residence/ accommodation to the CMT location. Furthermore, a Likert style question was used to ascertain the level of agreement respondents had in relation to specific statements regarding the location.

Joshi et al. (2015) and Neuman and Neuman (2006) state that a Likert scale measure is used most often in questionnaires to establish a respondents preferences and perceptions. Joshi et al. (2015) further state that Likert scales are summative measures. The Likert scale that was used in this study was: 1 - strongly disagree, 2 – disagree, 3 – neutral, 4 - agree and 5 - strongly agree. The last section of the questionnaire collected information on the demographic profile of the respondents. The aspects included were the respondents' age, highest level of education completed, monthly net income, gender and historical racial category for South Africans only.

Selected questions were used from the NDT visitor survey that were related to the objectives of the research. The survey data was analyzed comparatively and thematically to examine similarities and differences between the three provinces. The information was inputted into SPSS. Descriptive statistics were used to generate frequency tables and percentages. Additionally, inferential statistics were used to establish whether significant differences exist between the three provinces in relation to selected variables. Specifically, Chi-square tests (which compare the means of the variables) were used, with p values less than 0.05 denoting a statistically significant relationship between the three provinces and selected variables that were subjected to this test. As a result of the rounding off of percentages (whole numbers and to one decimal point if less than 1%), in some instances the percentage totals do not add up to 100%.

3.6. Sampling approach

Sampling, according to Dang (2015), refers to a definite plan to select a group of individuals to be the study subjects or participants out of a larger population which in this study was CMT location visitors. In terms of the sample size, the targeted sample size was 3 000 visitors in total at selected beach locations to ensure that generalizations could be made. The Northern Cape which is also a coastal province was not included in the study since it was decided after the piloting phase that this province did not have CMT products and markets. For the rest of the coastal provinces, proportionate sampling was used in relation to the different types or scope of CMT products and markets that exist as well as visitor demand and locations for CMT in the provinces. Specifically, 1 200 beach visitors was the targeted sampling size for KwaZulu-Natal, 1 100 for the Western

Cape and 700 for the Eastern Cape. The number of surveys that were completed were 1 218 in KwaZulu-Natal, 1 108 in Western Cape and 700 in the Eastern Cape. In total, 3 026 surveys were completed. Thus, more surveys than the targeted number were completed in KwaZulu-Natal and the Western Cape.

At the specific selected CMT locations in each of the provinces, spatially-based sampling was used. As Hansen (2017) and Le Berre et al. (2013) note, there are challenges when undertaking research in coastal and marine areas since these locations generally constitute large and open landscapes with visitors moving in and out, especially in public spaces. This impacts on sampling and monitoring efforts. In this study, to reduce bias, fieldworkers were allocated specific locations on specific days and they were trained to conduct the surveys. On a given day, the fieldworker purposively chose the first person to be interviewed. Thereafter, a systematic sampling approach was adopted. Specifically, on completion of a survey, the fieldworker selected the 20^{th} person (who was 18 years or older) to participate in the study. If the person chose not to participate, the next adult passing by was approached. Surveys were conducted during the course of an entire day, weather permitting. Adopting the systematic sampling approach assisted to reduce bias since the CMT location visitor population could not be established before to compile a list of the visitors and the population is constantly mobile which did not allow for random sampling to be used as noted by Bob et al. (2018). As indicated earlier, only persons visiting the chosen locations to participate in CMT activities (whether completed or planned) were interviewed and this was established with a screening question being included in the survey. Ensuring that different CMT locations were included, that surveys were undertaken during peak and off-peak seasons and that at the selected locations interviews were completed in different areas and at different times assisted in increasing the representativeness of the sampled population and reducing bias in the selection of respondents.

Data collection was undertaken during September 2018 to January 2019. Surveys were conducted during peak/ vacation (which included the September/ October vacation and December/ January festive season) and off-peak seasons during September 2018 to January 2019. Face-to-face interviews were conducted, unlike most studies cited in the previous literature review chapter that rely on self-completion surveys, that is, surveys are left with tourists and completed surveys are

collected. This was done to increase the reliability and validity of the data collected since questions could be explained to the respondents if need be. Additionally, the face-to-face approach results in higher response rates and more surveys that can be used because of being properly completed.

3.7. Conclusion

This chapter discussed the study area for this research, and extensively outlined the research design and methodological approach as well as the data collection instrument and data analysis tools utilized to obtain the data that was in turn analyzed to obtain the results of the research. Firstly, South Africa's coastline was described as the case study emphasizing the coastal and marine biodiversity in the country and in each of the provinces. This was followed by a description of the use of the data collection survey instrument together with the sampling approach adopted. The following chapter presents and discusses the results and important findings from the data analyzes.

CHAPTER FOUR
DATA DESCRIPTION AND ANALYSIS

4.1. Introduction

As indicated in the previous chapters, CMT is an important sub-sector of tourism. In the South African context in particular, vast and widespread coastal and marine environments and activities provide numerous CMT destinations and opportunities along the country's more the 3 000 km shoreline. These destinations attract different types of users and visitors whose profiles, experiences, expectations and demands influence preferences for CMT activities and destinations, plans for repeat visitation and/ or travel to other CMT locations, and word-of-mouth marketing. Additionally, visitor profiles, preferences, behaviors and experiences impact on CMT demand and landscapes as well as the future sustainability of these locations. The literature review chapter highlights the importance of understanding visitor profiles and demands as well as examining behaviors and perceptions. However, as indicated, current research focuses on specific types of CMT activities in selected locations. This study undertakes a provincial comparative analysis, which to the best of the author's knowledge, has not been undertaken before of the three CMT provinces in South Africa (the Eastern Cape, KwaZulu-Natal and the Western Cape).

This chapter presents selected results pertinent to the objectives of the research from the visitor surveys undertaken in purposively selected coastal locations in the three provinces. A thematic analysis is undertaken in five sections. The first section examines the socio-demographic profiles of the visitors interviewed in relation to age, gender, highest level of education achieved and monthly net income. This is followed by a discussion of the visitor profiles in relation to type of visitors (disaggregated into local residents, day-trippers and overnight visitor) and country of residence of respondents if foreigners and, if South Africans, provinces they were from. The next section examines CMT participation in selected activities and future interest in participating in these activities as well as the main non-CMT activities that respondents participated in during their visit to the CMT location where the interview was held. Additionally, this section looked at the number of times respondents previously participated in CMT activities in South Africa and if they would advise friends, relatives and/ or colleagues to participate in CMT activities in South Africa.

Thereafter, visitor spend patterns are discussed together with the number of persons in the immediate group spending money together and the primary/ main reason for visiting the CMT location where the interview was held. This section also includes a discussion on the mode of transport respondents' used from their place of residence/ accommodation to the CMT location. The last section examines visitor perceptions of the CMT location in relation to specific statements that covered impressions of whether the location is well maintained, parking adequacy, sufficiency of facilities and amenities, refreshment areas/ food variety, greening/ responsible environmental practices, signage, safety considerations, entertainment opportunities and crowding at the location.

4.2. Socio-demographic profile of respondents

As highlighted in the literature review chapter, examining the socio-demographic profiles of visitors are important to understand CMT demand as well as inform effective destination management and marketing strategies (Lui et al., 2019; Oh et al., 2010). Additionally, socio-demographic variables assist in assessing who chooses CMT destinations and how various factors influence the decisions they make. The key socio-demographic variables examined in the literature are age, gender, level of education, income and nationality. These are discussed in this section.

The average age of the respondents was 36 years and ranged from 19 to 88 years old. The average age for the respondents in the Eastern Cape was slightly lower than the overall average (34 years) and ranged from 19 to 75 years. Similarly, a slightly lower average age was calculated for KwaZulu-Natal respondents (35 years) but the range was the same as the overall from 19 to 88 years old. In Western Cape, however, the average age of the respondents was higher than the overall average (39 years) and ranged from 19 to 78 years old. In all provinces, most respondents were in the age categories of 21-30 years old (28% overall: 34% in KwaZulu-Natal, 32% in the Eastern Cape and 20% in the Western Cape), 31-40 years old (33% overall: 36% in the Eastern Cape, 34% in KwaZulu-Natal and 29% in the Western Cape) and 41-50 years old (20% overall: 26% in the Western Cape, 18% in KwaZulu-Natal and 14% in the Eastern Cape) as shown in Table 4.1. The results reveal that adult visitors that frequented coastal and marine areas were the interviews were conducted were from a range of age groups with younger and middle aged groups being more dominant. The results were dissimilar to Dodd and Holmes' (2019) study which found

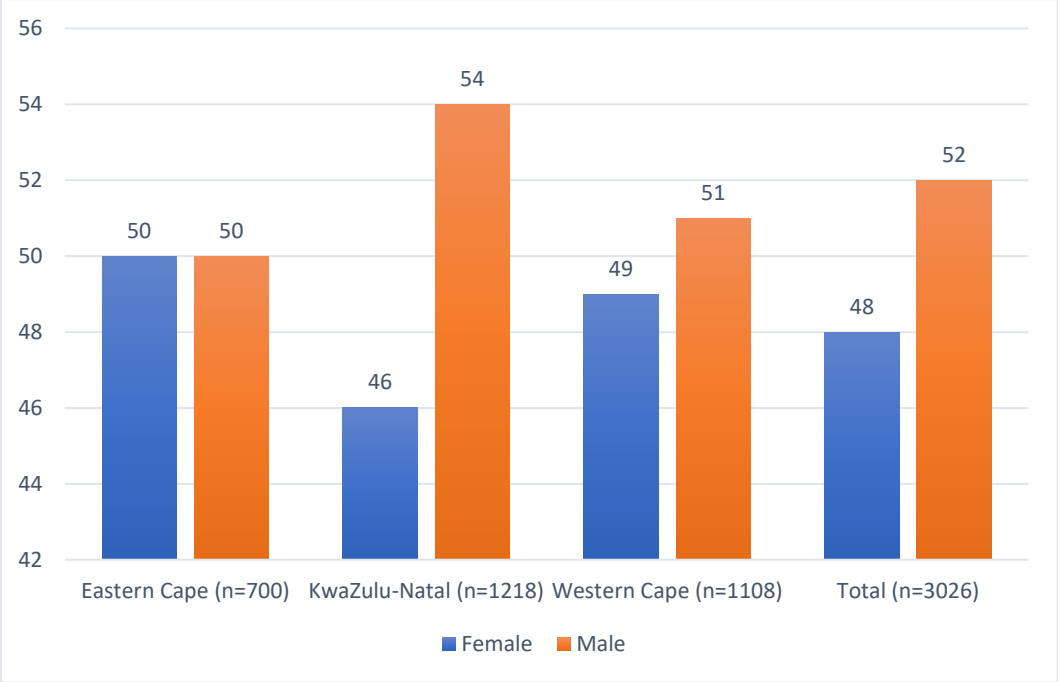
that visitors were evenly distributed from all age categories but similar to Kruger et al.'s (2018) research that also revealed an average age of 34 years.

Table 4.1: Age category of respondents (n=3026, in %)

	Eastern Cape (n=700)	KwaZulu-Natal (n=1218)	Western Cape (n=1108)	Total (n=3026)
N/A	.1	.5	.2	.3
18-20	10	6	5	6
21-30	32	34	20	28
31-40	36	34	29	33
41-50	14	18	26	20
51-60	7	7	15	10
61-70	1	2	3	2
>70	.1	.5	.2	.3

In terms of the gender of the respondents, Figure 4.1 shows that almost equal proportions were males (52%) and females (48%). The implication here is that both males and females equally enjoy visiting CMT locations and participating in the various CMT activities thus showing the Coastal areas, as a tourism choice, are popular amongst both genders. Slight differences were noted among the provinces. Specifically, in the Eastern Cape equal proportions were male and female (50% each), while in KwaZulu-Natal 54% of the respondents were male and 46% were female, and in the Western Cape, 51% of the respondents were male and 49% were female. The results in this study are dissimilar to Dodd and Holmes (2019), Geldenhuys and van der Merwe (2014), Kruger et al. (2018) and Lucrezi et al.'s (2016) research where the findings showed that more visitors were females than males, but similar to the findings of Dicken and Hosking (2009) and Li et al.'s (2019) research.

Figure 4.1: Gender of respondents (n=3026, in %)



In relation to the level of education of the respondents, Table 4.2 indicates that almost all the respondents had matric or post-matric qualifications (94% in total: 95% in the Western Cape, 94% in the Eastern Cape and 92% in KwaZulu-Natal) although noticeable differences are discernible among the provinces in relation to the qualifications obtained. Specifically, more respondents in KwaZulu-Natal and the Eastern Cape had completed matric/ secondary schooling (30% and 27%, respectively) and certificates/ diplomas (25% and 26%, respectively) compared to the Western Cape (9% and 12%, respectively). On the other hand, more respondents in the Western Cape had undergraduate degrees (44%) and postgraduate degrees (30%) than those in the Eastern Cape (28% and 13%, respectively) and KwaZulu-Natal (28% and 13%, respectively). As will be shown later, overnight and day visitors from out of town generally had higher educational levels than those who were local residents and more visitors were in these groups in the Western Cape than in the Eastern Cape and KwaZulu-Natal. This is in line with the profiles of tourists who travel who tend to be more educated (Dodd and Holmes, 2019; Jarvis et al., 2016; Kruger et al., 2018; Lucrezi et al., 2016; Mudarra-Fernández et al., 2019). CMT as an activity itself tends to have educational benefits.

Table 4.2: Highest level of education completed by respondents (n-3026, in %)

	Eastern Cape (n=700)	KwaZulu-Natal (n=1218)	Western Cape (n=1108)	Total (n=3026)
No formal education	1	1	1	1
Primary completed (7 years of schooling)	.1	1	.2	.5
Partial/ secondary completed (8-11 years of schooling)	4	8	2	5
Matric/ secondary completed	27	30	9	22
Certificate/ diploma	26	25	12	21
Undergraduate degree	28	24	44	32
Postgraduate degree	13	13	30	19

The overall average monthly income of the respondents was calculated to be R25 277 using SPSS and ranged from none to R1 200 000. In terms of the province specific average monthly income of respondents, these were R33 423 (ranging from none to R325 000) for the Western Cape, R21 364 (ranging from none to R1 200 000) for KwaZulu-Natal and R19 703 (ranging from none to R235 000) for the Eastern Cape. A substantial proportion of respondents (28% in total: 30% in the Western Cape, 29% in the Eastern Cape and 27% in KwaZulu-Natal) did not disclose their income (Table 4.3). This is a challenge when undertaking visitor surveys since some people regard income as confidential information. Similar to the educational levels, higher levels of income were noted in relation to travelers visiting the CMT location from outside the local area. As indicated by Jarvis et al. (2016), income influences visitor experience at destinations, including preferences for and the extent of participation in activities.

Table 4.3: Monthly net income (in Rands) categories of respondents (n=3026, in %)

	Eastern Cape (n=700)	KwaZulu-Natal (n=1218)	Western Cape (n=1108)	Total (n=3026)
1 – 8000	6	10	2	6
8001 – 10000	7	11	2	7
10001 – 20000	10	13	5	9
20001 – 30000	17	17	8	14
30001 – 40000	13	8	16	12
40001 – 50000	4	5	28	13
>50000	1	2	2	1
None	13	9	7	9
Did not disclose	29	27	30	28

In the South African context, examining ethnic and racial categories are important since the country has a transformational agenda and redressing apartheid legacies are important. This is also important in the context of tourism generally and CMT specifically where in the past black people did not generally travel for recreational and leisure purposes because of apartheid restrictions on mobility as well as limited disposable income. In terms of CMT specifically, CMT locations (beaches in particular) were designated for different historical racial groups. Thus, examining the racial profile of visitors is important. This study also included a question on the historical racial category of the respondents who were South Africans. However, the responses were problematic with many responses referring to nationality rather than racial category as well as some of the respondents not disclosing the historical racial category. Thus, the results were not analyzed. It is imperative that questions regarding nationality and racial/ ethnic backgrounds of respondents are differentiated and clearly stated in surveys. Additionally, in larger research efforts such as this study where surveys were conducted in three provinces traversing more than 2 500 km in coastline and therefore requiring a team of fieldworkers, training must ensure that these aspects are well covered and field supervisors are alerted to check these responses when the research is being undertaken.

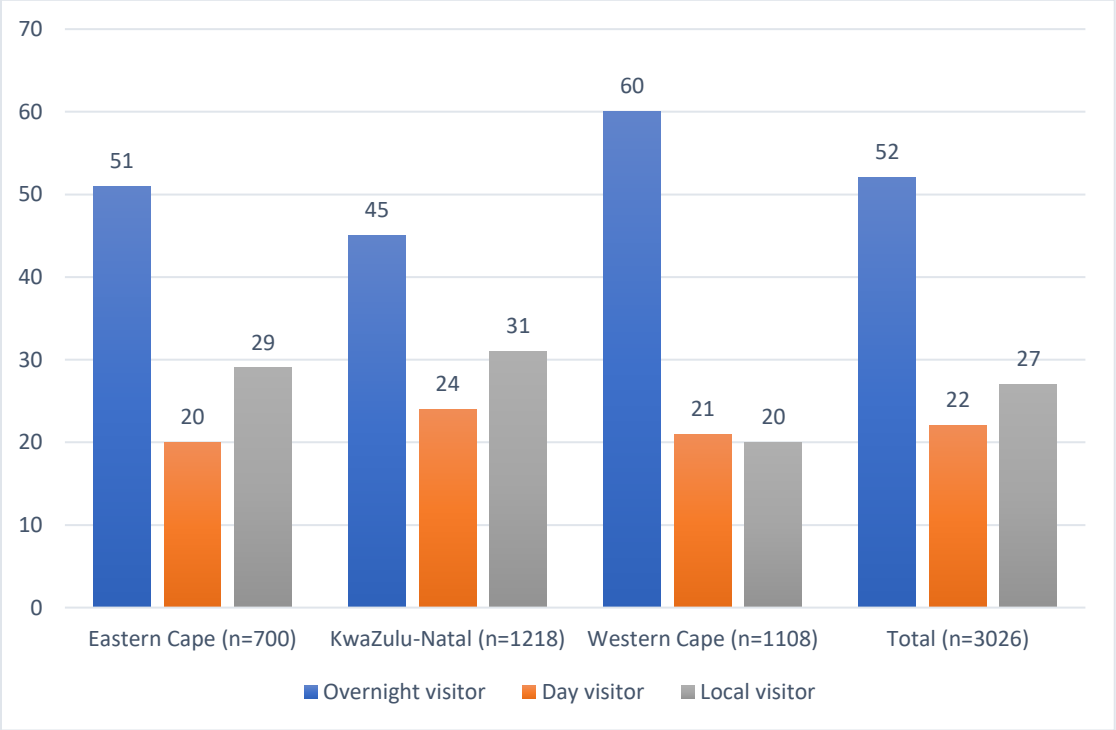
The differences in socio-demographic visitor variables, although not substantial, among the different provinces as well as when results are compared with other studies reveal the importance of understanding contexts when examining CMT visitor profiles.

4.3. Visitor profile of respondents

Peña-Alonso et al. (2018) underscore the importance of looking at the type of visitors to CMT locations, noting that there are differences in relation to visitation. Figure 4.2 shows that in this study, slightly more than half of the respondents (52%) were overnight visitors and the rest were local residents (27%) and day visitors from out of town (22%). There were statistically significant differences between the different provinces and the proportion of respondents who were overnight visitors and local residents, with p values of 0.000 for both. Specifically, more respondents were overnight visitors in the Western Cape (60%) followed by the Eastern Cape (51%) and KwaZulu-Natal (45%). Additionally, there were more local visitors in KwaZulu-Natal (31%) and the Eastern Cape (29%) compared to the Western Cape (20%). No statistically significant relationship was found in relation to day visitors from out of town (p=0.081) with similar proportions for all provinces: 24% in KwaZulu-Natal, 21% in the Western Cape and 20% in the Eastern Cape. The higher proportion of respondents who were overnight visitors in the Western Cape could be attributed to this province being the main destination for foreign tourists in South Africa. The higher proportion who were local residents in KwaZulu-Natal and the Eastern Cape could be as a result of the beaches in these provinces being more sub-tropical and warmer compared to the Western Cape where beaches in these locations are frequented by local residents for leisure and recreational purposes. The dominance of locals and day-trippers in KwaZulu-Natal, for example, was noted by Ahmed et al. (2008). Additionally, Lucrezi et al. (2016) underscores the prevalence of day-trippers and overnight visitors at beach and other coastal tourism locations in Cape Town. The results do reveal provincial differences which support Peña-Alonso et al.'s (2018) assertion that there are variations in relation to the type of visitors.

Despite the differences, however, the results reveal that in all three provinces CMT locations attract overnight tourists, day-trippers and local residents. This supports the literature that indicates that CMT locations attract multiple users and stakeholders of which tourists and recreational visitors are the main ones (Krelling et al., 2017; Li et al., 2019; Lucrezi et al., 2018; Oh et al., 2010; Peña-Alonso et al., 2018). The different user groups also align to Woodside and Martin's (2008) contention that market segmentation is noticeable at CMT locations which also relate to the socio-demographic profiles presented in the previous section. Furthermore, the results reinforce Seymour's (2012) assertion that South Africa's coastline is a key destination for both tourists and locals. Although this study does not focus on interactions and conflicts among the different user groups, these were highlighted by Li et al. (2019) who assert that visitor interactions can influence perceptions and experiences. This aspect should be considered on future studies.

Figure 4.2: Overnight visitor, day visitor or local resident (n=3026, in %)



In relation to the country of residence of the visitors interviewed, Table 4.4 indicates that most of the respondents were South Africans (74% in total) and the rest were foreign visitors (26%). Stark

differences were noted in relation to the country of residence of the visitors in the provinces which was also reinforced with a chi-squared test value of p=0.000. Specifically, almost all of the respondents in KwaZulu-Natal (96%) and the Eastern Cape (87%) were from South Africa. On the other hand, less than half of the respondents (42%) were from South Africa in the Western Cape. This again reflects the Western Cape's position as the main foreign tourist destination in the country. In terms of foreign visitors, country responses were categorized into continents as indicated in Table 4.4. Most were from Europe (12% in total: 27% in the Western Cape, 7% in the Eastern Cape and 2% in KwaZulu-Natal) which is one of South Africa's key tourist markets. Fewer foreign visitors were from other continents. Specifically, 4% were from Africa (7% in the Western Cape, 3% in the Eastern Cape and 0.7% in KwaZulu-Natal) and North America (9% in the Western Cape, 2% in the Eastern Cape and 1% in KwaZulu-Natal). Two percent each were from Asia (6% in the Western Cape, 0.4% in the Eastern Cape and 0.2% in KwaZulu-Natal), Australia and New Zealand (3% in the Western Cape and 1% in the Eastern Cape) and South America (5% in the Western Cape, 0.1% in the Eastern Cape and 0.1% in KwaZulu-Natal). Additionally, a few respondents were from the Middle East who visited the Western Cape (0.8%). The results reflect the national trends with the exception of visits from other countries in Africa which is viewed as a key tourism source market for South Africa. The findings suggest that this trend is not evident in relation to CMT particularly, and may reflect Ahmed et al.'s (2008) assertion that African tourists are generally from neighboring African countries and their main reason for visiting South Africa is shopping.

Table 4.4: Place of residence of foreign respondent in relation to continent (n=3026, in %)

	Eastern Cape (n=700)	KwaZulu-Natal (n=1218)	Western Cape (n=1108)	Total (n=3026)
Not applicable (South Africans)	87	96	42	74
Africa	3	.7	7	4
Asia	.4	.2	6	2
Australia and New Zealand	1	-	3	2
Europe	7	2	27	12
Middle East	-	-	.8	.3
North America	2	1	9	4
South America	.1	.1	5	2

As indicated in the Table 4.4, most of the respondents were South Africans. Table 4.5 illustrates the provinces where South African respondents were from. In relation to the coastal provinces that were the focus of this study, in total, 30% were from KwaZulu-Natal, 16% from the Eastern Cape and 10% were from the Western Cape. Most respondents were from within the coastal provinces and furthermore most of these respondents were local residents. Specifically, in the Eastern Cape, 49% of the respondents were from the Eastern Cape (with 30% being locals) and fewer respondents were from the other coastal provinces (11% from KwaZulu-Natal and 1% from the Western Cape). Similar trends are discernible in relation to KwaZulu-Natal and the Western Cape. Sixty percent of the respondents were from KwaZulu-Natal (with 31% being locals) and fewer respondents were from the other coastal provinces (15% from the Eastern Cape and 5% from the Western Cape). Twenty six percent of the respondents were from the Western Cape (with 20% being locals) and fewer respondents were from the other coastal provinces (4% from the Eastern Cape and 1% from KwaZulu-Natal). The importance of including the experiences, perceptions and interests of local residents has been highlighted by Ahmed et al. (2008), Krelling et al. (2017), Lucrezi et al. (2016), Orams and Page (2000), Peña-Alonso et al. (2018) and Seymour (2012) so that demand at CMT locations can be better understood and managed. This is particularly important in the South African context were, as Ahmed et al. (2008) indicate, in many beach locations specifically, locals and day-trippers are the main visitors. It is important to note that KwaZulu-Natal had the highest

proportion of respondents (29% compared to 19% in the Eastern Cape and 6% in the Western Cape) who were overnight visitors and day-trippers to the CMT destinations from within the province.

In relation to visitors from the other provinces, Gauteng, which is the main domestic tourism market in South Africa for beach tourism (Geldenhuys and van der Merwe, 2014), had the highest proportion of respondents (12% in total: 16% in KwaZulu-Natal, 12% in the Eastern Cape and 7% in the Western Cape). Two percent of the respondents were noted for the Free State (2% in KwaZulu-Natal, 2% in the Eastern Cape and 1% in the Western Cape), Limpopo (2% in KwaZulu-Natal, 3% in the Eastern Cape and 0.7% in the Western Cape) and Mpumalanga (3% in KwaZulu-Natal, 3% in the Eastern Cape and 1% in the Western Cape). The fewest respondents were from the North West (0.7% in each of the provinces) and the Northern Cape (0.4% in total: 0.5% each in KwaZulu-Natal and the Western Cape). The results reveal that KwaZulu-Natal is the main domestic tourism market for CMT which reflects the national trend as well for tourism generally.

Table 4.5: Province where respondents are from (n=3026, in %)

	Eastern Cape (n=700)	**KwaZulu-Natal (n=1218)**	**Western Cape (n=1108)**	**Total (n=3026)**
Not applicable (foreigners)	13	4	58	26
Eastern Cape	49 (30% locals)	11	1	16
Free State	2	2	1	2
Gauteng	12	16	7	12
KwaZulu-Natal	15	60 (31% locals)	5	30
Limpopo	3	2	.7	2
Mpumalanga	3	3	1	2
Northern Cape	-	.5	.5	.4
North West	.7	.7	.7	.7
Western Cape	4	1	26 (20% locals)	10

4.4. CMT participation and future interest

As indicated in the literature review chapter, there are different types of marine tourism and coastal tourism activities which generally are interconnected. This study indicates that respondents participated in multiple CMT activities during their visit to the beach/ coastal locations on the day when the interviews were conducted. It is important when undertaking interviews to establish participation in activities with visitors at a specific CMT location that it is critical to consider not only activities that they have taken part in but also activities that they plan to take part in that they have not mentioned. This approach was used in this study and the responses are presented in Table 4.6.

The main activities that respondent participated in or planned to participate in were sand/ beach recreational activities (78% did participate and 32% will participate). As indicated by NDT (2016), sand/ beach activities include swimming, beach combing, kite-flying, sand dune surfing and sand castles. Provincial differences were noted with the highest participation rates in this activity being in KwaZulu-Natal (86% did and 20% will)) followed by the Eastern Cape (79% did and 17% will). The lowest participation rate was in the Western Cape (68% did and 56% will). Again, this could be attributed to weather and beach conditions at specific CMT locations with water temperatures being higher in KwaZulu-Natal that has the warm Agulhas Current compared to the coastal waters of the Western Cape and most of the Eastern Cape that has the cold Benguela Current. The prominence of sand/ beach activities resonates with the 3S (sun, sea and sand) activities being the main attractions for CMT as indicated by Carvache-Franco et al. (2019a), Eagleton and du Plessis (2019), Rutty and Scott (2015) and Schuhmann et al. (2019). Sandy beaches are identified as key CMT destinations in the South African context as identified by Lucrezi et al. (2016; 2018). Thus, the main CMT attraction in South Africa is similar to global trends as shown by Eagleton and du Plessis (2019) who indicate that beach tourism globally is the most important form of tourism and the main CMT attraction. Thus, blue tourism linked to the blue economy as highlighted in the literature by Cañavate et al. (2019), Eagleton and du Plessis (2019) and Tegar and Gurning (2018) is noticeable in this study.

Sand/ beach activities was followed by pure recreational activities (38% did participate and 17% will participate) which, according to the NDT (2016), includes dining out and shopping specifically linked to the coastal locations/ attractions and/ or coastal cuisine and products. Again, there are provincial differences with the highest participation rates in this activity being in the Eastern Cape (51% did and 22% will) followed by KwaZulu-Natal (49% did and 16% will). The lowest participation rate was in the Western Cape (18% did and 13% will). These additional CMT associated recreational activities increase spend at CMT locations, thereby contributing to greater local economic impacts, as well as enhances visitor experiences at the destination (Carvache-Franco et al., 2018; Jarvis et al., 2016; Tegar and Gurning, 2018). However, it is important to note that too many of these facilities can detract from positive beach experiences as indicated in Slater and Mearns' (2018) study that shops were the least identified beach user preference.

In relation to other coastal tourism activities identified by NDT (2016), fewer respondents identified these activities that they have participated in or will participate in. In relation to sightseeing, 25% did participate and 18% will participate in this activity. Unlike sand/ beach and pure recreational activities, more respondents in the Western Cape (41% did and 35% will) identified sightseeing compared to the Eastern Cape (18% did and 10% will) and KwaZulu-Natal (13% did and 7% will). Sightseeing was also noted by Lucrezi et al. (2016) as a key activity that visitors to sandy beaches in South Africa participated in. For coastal heritage activities, 14% of the respondents indicated that they did and will participate in this activity with similar trends to sightseeing with more respondents in the Western Cape (21% did and 26% will) than the Eastern Cape (13% did and 9% will) and KwaZulu-Natal (8% did and 5% will).

Coastal heritage activities are noted by UNEP (2009) and South Africa has many heritage sites and experiences linked to the coast including internally declared UNESCO World Heritage Sites such as the iSimangaliso Wetland Park in KwaZulu-Natal and Robben Island in the Western Cape. The low participation rates may reflect lack of knowledge of coastal heritage opportunities among visitors and/ or lack of integration of coastal heritage activities for visitors by destination managers. Coastal heritage is an important aspect to consider since, as highlighted by Rogerson et al. (2018), they not only diversify tourism offerings but have the potential to increase economic inclusion and opportunities for business development in coastal areas that can have substantial impacts on rural

communities who remain marginalized. Promoting coastal cultural heritage activities also contributes to raising awareness, ensuring preservation and thereby having societal benefits as well, as argued by Leijzer and Denman (2014).

Educational and scientific excursions (6% did and 5% will in total) as well as spiritual experiences (4% did and 5% will in total) had the lowest participation rates among the coastal tourism activities identified by the respondents. Barbier (2017) and Dodd and Holmes (2019) indicate that a main activity in coastal and marine areas are scientific and educational opportunities, especially in relation to environmental education. However, this study shows that in South Africa this type of activity is not widespread at CMT locations which can be strengthened in the future.

In relation to the literature, other coastal tourism activities identified in some of the studies reviewed that this study did not pay attention to were photography, camping, bike riding, quad biking and horse riding (Lucrezi et al., 2016). Future research should consider these types of activities as well. It is also important to note that several activities are interlinked. For example, pure recreational includes dining/ eating which may be associated with local, unique cuisine that can be considered as being a cultural heritage activity as well.

The marine tourism activities identified by NDT (2016) had lower participation rates with all responses being less than 10% with the exception of water sports with 15% of the respondents stating that they did participate (24% in the Western Cape, 11% in KwaZulu-Natal and 9% in the Eastern Cape) and 12% (23% in the Western Cape, 7% in the Eastern Cape and 4% in KwaZulu-Natal) indicating that they will participate. Water sport activities are also popular at other CMT destinations as shown by Blignaut et al. (2016), Lucrezi et al. (2016) and Tegar and Gurning (2018). A limitation of this study is that respondents were not specifically asked about their participation in beach recreational sports such as volleyball and soccer which is also increasing in popularity, not only for recreational purposes but also competitively as shown by Ahmed et al. (2008) who reveal how beach sport tourism events have increased in South Africa. The results indicate that in South Africa water sports tourists/ visitors are evident as categorized by Carvache-Franco et al. (2019a).

Recreational fishing had the next highest responses among marine tourism activities with 7% of the respondents stating that they did participate (9% in KwaZulu-Natal, 6% in the Western Cape and 4% in the Eastern Cape) and will participate (11% in the Western Cape, 7% in the Eastern Cape and 4% in KwaZulu-Natal). Recreational fishing is noted as an important CMT activity by Hall (2001), Lucrezi et al. (2016), Papageorgiou (2016) and Saayman (2017) which can be land-based (that is from the beach) or boat-based (while in the ocean). Fishing is also a competitive sport, as indicated by Papageorgiou (2016) that needs to be considered as indicated earlier. Additionally, as Chen and Bau (2016), Lucrezi et al. (2018) and Snider et al. (2015) warn, over-fishing is a major concern and a main source of over-extraction of marine resources that are undermining sustainability in our coastal and marine ecosystems.

Recreational fishing was closely followed by wildlife tourism with 7% of the respondents stating that they did participate (11% in KwaZulu-Natal, 9% in the Eastern Cape and 3% in the Western Cape) and 6% indicating that they will participate (6% in KwaZulu-Natal, 8% in the Eastern Cape and 4% in the Western Cape). Six percent of the respondents stated that they did participate in marine events (9% in the Eastern Cape and 5% each in KwaZulu-Natal and the Western Cape) with 5% indicating that they will participate (7% in the Eastern Cape, 5% in the Western Cape and 3% in KwaZulu-Natal). While this study did not probe on which types of wildlife tourism activities respondents participated in, the literature review indicates that whale watching, dolphin viewing and shark diving were key activities that are similar to other parts of the world. Thus, as indicated by Cinner (2014), Higham et al. (2016), Kruger et al. (2018), O'Connor et al. (2009), Tegar and Gurning (2018) and Tkaczynski and Rundle-Thiele (2018), wildlife mammal viewing and interactions are key marine tourism activities. Furthermore, it is important to note that wildlife tourism is also often associated with activities such as scuba diving and snorkeling. Additionally, they tend to be location specific as shown by Kruger et al. (2018), O'Connor et al. (2009) and Tkaczynski and Rundle-Thiele (2018) in the South African context. It is also important to note, as highlighted by Higham et al. (2016) and Kiszka et al. (2015), that wildlife mammal viewing can cause the largest disturbances to animals and this can result in considerable ecosystem damage if not well managed and regulated.

Five percent of the respondents stated that they did (7% in the Eastern Cape, 5% in KwaZulu-Natal and 3% in the Western Cape) and will (7% in the Eastern Cape and 5% each in KwaZulu-Natal and the Western Cape) participate in ocean experiences. In the South African context (NDT, 2016) and in other parts of the world (Drius et al., 2019), cruise tourism is a significant type of ocean experience which is associated with specific port locations. The least responses were for scuba diving/ snorkeling with 3% indicating that they did (4% in KwaZulu-Natal, 3% in the Eastern Cape and 2% in the Western Cape) and will (5% in the Eastern Cape, 3% in the Western Cape and 2% in KwaZulu-Natal) participate. The results differ from island CMT activities which exhibit higher levels of participation in scuba diving/ snorkeling activities as shown by Cinner (2014) and Li et al. (2019). Furthermore, this study also does not reflect assertions by NDT (2016) that scuba diving/ snorkeling activities is a key activity in South Africa. Given that this study focuses on the three coastal provinces, the results may suggest that activities such as scuba diving/ snorkeling are confined to specific locations and therefore do not emerge as key activities when national and provincial orientations are adopted.

Table 4.6: CMT activities respondents did (D) or would (W) participate in during visit to CMT location when interview was held (in %): Multiple responses

	Eastern Cape (n=700)		KwaZulu-Natal (n=1218)		Western Cape (n=1108)		Total (n=3026)	
	D	W	D	W	D	W	D	W
Wildlife tourism (e.g. whale watching, turtle tours, seals, dolphins)	9	8	11	6	3	4	7	6
Recreational fishing (e.g. boat-based fishing, spear fishing, fishing competitions)	4	7	9	4	6	11	7	7
Scuba diving/ snorkeling (e.g. shark cage diving)	3	5	4	2	2	3	3	3
Water sports (e.g. big wave surfing, kite surfing, stand up paddle boarding, yachting, water skiing, water surfing)	9	7	11	4	24	23	15	12
Ocean experience (e.g. cruise tourism, marinas, island tourism, shipwreck diving)	7	7	5	5	3	5	5	5
Events (e.g. marine festivals and marine competitions such as yacht races or regattas, fishing competitions)	9	7	5	3	5	5	6	5
Sand/beach recreational activities (e.g. swimming, walking or running, kite-flying, beach combing, sand dune surfing)	79	17	86	20	68	56	78	32
Coastal heritage activities (e.g. local seafood and cultural tourism, cultural history)	13	9	8	5	21	26	14	14
Sightseeing (e.g. light house tourism, cycling, marathons)	18	10	13	7	41	35	25	18
Educational and scientific excursions (e.g. aquariums)	8	7	5	5	7	9	6	7
Spiritual experiences	4	4	2	2	5	7	4	5
Pure recreational (e,g, dining out, shopping)	51	22	49	16	18	13	38	17

Table 4.7 presents the results in relation to the total number of respondents who indicated that they did and/ or will participate CMT activities to denote those who participated in the activity during the visit to the CMT location when the interview was conducted as well as those respondents who indicated CMT activities that they would be interested in participating in the future that they did not participate in during the visit when the interview was held. In relation to the coastal tourism activities, the main activities that respondents indicated future interest in were sand/ beach recreational activities (45% in total: 77% in the Western Cape, 35% in KwaZulu-Natal and 12% in the Eastern Cape) with the combined did and will participation during the visit when the interview was held being dissimilar (78% in total: 86% in KwaZulu-Natal, 79% in the Eastern

Cape and 68% in the Western Cape). The results could suggest that visitors in all provinces are interested in sand/ beach activities but would prefer to participate in these activities in other locations rather than in the Western Cape where, as indicated earlier, the weather and water temperatures are not ideal when compared to the other provinces. The high levels of interest in the 3S is evident as well.

Similar trends were noted in relation to the other coastal tourism activities. Specifically, in relation to sightseeing, 37% (58% in the Western Cape, 29% in KwaZulu-Natal and 16% in the Eastern Cape) of the respondents indicated future interest with a combined did and will participation rate being 32% (40% in the Western Cape, 28% in the Eastern Cape and 18% in KwaZulu-Natal). For pure recreational activities, 31% (36% in KwaZulu-Natal, 33% in the Western Cape and 18% in the Eastern Cape) of the respondents indicated future interest with a combined did and will participation rate being 48% (65% in the Eastern Cape, 59% in KwaZulu-Natal and 24% in the Western Cape). Future interest in coastal heritage activities was 32% (45% in the Western Cape, 29% in KwaZulu-Natal and 22% in the Eastern Cape) among the respondents with a combined did and will participation rate being 23% (35% in the Western Cape, 22% in the Eastern Cape and 12% in KwaZulu-Natal). Future interest in educational and scientific excursions was 31% (35% in the Western Cape, 34% in KwaZulu-Natal and 20% in the Eastern Cape) among the respondents with a combined did and will participation rate being 12% (14% in the Eastern Cape, 13% in the Western Cape and 9% in KwaZulu-Natal). In relation to spiritual experiences, 28% (31% in KwaZulu-Natal, 30% in the Western Cape and 19% in the Eastern Cape) of the respondents indicated future interest with a combined did and will participation rate being 7% (19% in the Western Cape, 7% in the Eastern Cape and 4% in KwaZulu-Natal).

Similar trends to coastal tourism activities were discernible in relation to marine tourism activities with higher levels of future interest compared to participation rates during the visit when the interview was held. It is important to note that future interest in marine tourism activities was lower than coastal tourism activities generally which could also reflect hesitation by respondents as a result of costs as discussed later. Specifically, in relation to water sports, 34% (52% in the Western Cape, 26% in KwaZulu-Natal and 21% in the Eastern Cape) of the respondents indicated future interest with a combined did and will participation rate being 22% (34% in the Western Cape, 15%

in the Eastern Cape and 14% in KwaZulu-Natal). For ocean experiences, 30% (39% in KwaZulu-Natal, 25% in the Western Cape and 24% in the Eastern Cape) of the respondents indicated future interest with a combined did and will participation rate being 10% (14% in the Eastern Cape, 9% in KwaZulu-Natal and 7% in the Western Cape). Future interest in marine events was 28% (33% in the Western Cape, 26% in KwaZulu-Natal and 22% in the Eastern Cape) among the respondents with a combined did and will participation rate being 9% (15% in the Eastern Cape and 8% each in the Western Cape and KwaZulu-Natal). Future interest in wildlife tourism was 27% (34% in KwaZulu-Natal, 27% in the Eastern Cape and 20% in the Western Cape) among the respondents with a combined did and will participation rate being 13% (16% each in the Eastern Cape and KwaZulu-Natal and 6% in the Western Cape). Future interest in recreational fishing was 27% (33% in the Western Cape, 26% in KwaZulu-Natal and 18% in the Eastern Cape) among the respondents with a combined did and will participation rate being 13% (13 each in the Western Cape and KwaZulu-Natal and 11% in the Eastern Cape). In relation to scuba diving/ snorkeling, 23% (31% in KwaZulu-Natal, 25% in the Eastern Cape and 14% in the Western Cape) of the respondents indicated future interest with a combined did and will participation rate being 6% (8% in the Eastern Cape, 6% in KwaZulu-Natal and 5% in the Eastern Cape).

Table 4.7: CMT activities respondents did (D) and would (W) participate in (combined) during visit to CMT location when interview was held as well as interest in participating in activities in the future (F) (in %)

	Eastern Cape (n=700)		KwaZulu-Natal (n=1218)		Western Cape (n=1108)		Total (n=3026)	
	DW	F	DW	F	DW	F	DW	F
Wildlife tourism (e.g. whale watching, turtle tours, seals, dolphins)	16	27	16	34	6	20	13	27
Recreational fishing (e.g. boat-based fishing, spear fishing, fishing competitions)	11	18	13	26	13	33	13	27
Scuba diving/ snorkeling (e.g. shark cage diving)	8	25	6	31	5	14	6	23
Water sports (e.g. big wave surfing, kite surfing, stand up paddle boarding, yachting, water skiing, water surfing)	15	21	14	26	34	52	22	34
Ocean experience (e.g. cruise tourism, marinas, island tourism, shipwreck diving)	14	24	9	39	7	25	10	30
Events (e.g. marine festivals and marine competitions such as yacht races or regattas, fishing competitions)	15	22	8	26	8	33	9	28
Sand/beach recreational activities (e.g. swimming, walking or running, kite-flying, beach combing, sand dune surfing)	79	12	86	35	68	77	78	45
Coastal heritage activities (e.g. local seafood and cultural tourism, cultural history)	22	15	12	29	35	45	23	32
Sightseeing (e.g. light house tourism, cycling, marathons)	28	16	18	29	49	58	32	37
Educational and scientific excursions (e.g. aquariums)	14	20	9	34	13	35	12	31
Spiritual experiences	7	19	4	31	19	30	7	28
Pure recreational (e,g, dining out, shopping)	65	18	59	36	24	33	48	31

The chi-squared test results examining the relationships between provinces and participation in specific CMT activities as well as future interest in participating also indicate strong statistical differences as discussed earlier with p values of 0.000 for all activities with the exception of recreational fishing and scuba diving/ snorkeling for did and would participate with no statistically significant relationship (p values were less more than 0.05). The findings also reveal that CMT activities generally differ among provinces in South Africa which is indicative of the different provinces having different types of coastal and marine locations and CMT products and activities. This also reflects the diversity in the CMT landscape in South Africa which reveal opportunities

to offer a range of different types of CMT products and activities in different locations. However, it also suggests that marketing and management of specific locations and regions need to consider these differences to be effective.

Table 4.8: Chi-squared tests p values examining whether there is a relationship between provinces as well as did and would participate in CMT activities combined and future interest in participating in these activities

	Did and would combined	Future interest
Wildlife tourism (e.g. whale watching, turtle tours, seals, dolphins)	0.000	0.000
Recreational fishing (e.g. boat-based fishing, spear fishing, fishing competitions)	0.259	0.000
Scuba diving/ snorkeling (e.g. shark cage diving)	0.013	0.000
Water sports (e.g. big wave surfing, kite surfing, stand up paddle boarding, yachting, water skiing, water surfing)	0.000	0.000
Ocean experience (e.g. cruise tourism, marinas, island tourism, shipwreck diving)	0.000	0.000
Events (e.g. marine festivals and marine competitions such as yacht races or regattas, fishing competitions)	0.000	0.000
Sand/beach recreational activities (e.g. swimming, walking or running, kite-flying, beach combing, sand dune surfing)	0.000	0.000
Coastal heritage activities (e.g. local seafood and cultural tourism, cultural history)	0.000	0.000
Sightseeing (e.g. light house tourism, cycling, marathons)	0.000	0.000
Educational and scientific excursions (e.g. aquariums)	0.000	0.000
Spiritual experiences	0.000	0.000
Pure recreational (e.g. dining out, shopping)	0.000	0.000

The results indicate high levels of interest in CMT products/ activities in current levels of participation and future interest in CMT activities, especially coastal compared to marine tourism products/ activities. The lower marine tourism rates could be linked to these activities usually requiring additional expenses to be incurred since payment is often required for these activities. This could be the reason why more studies focus on marine activities since a key component of CMT research tends to focus on economic impacts and while these activities have lower participation rates (as evident in the South African context as this study shows), the costs could result in higher economic impacts at the local level. The findings also indicate that visitors at CMT locations participate in and desire to participate in multiple activities, which also includes a

combination of coastal and marine activities that reinforces UNEP's (2009) assertion that CMT provides unique tourism opportunities as a result of the interface of land and sea environments.

The prominence of passive and active leisure CMT activities as identified by Nulty et al. (2007) is evident. It is interesting to note that visitors to CMT locations mainly participate in coastal activities such as sand/ beach recreational activities, pure recreational, sightseeing and coastal heritage activities. Thus, in relation to Liquete et al.'s (2013) five coastal tourism typologies and four recreational activity groups identified in the literature review, the most prominent is beach tourism and playing/ exercise, respectively. Additionally, in terms of Carvache-Franco et al.'s (2019a; 2019b) three CMT tourist segments, the most dominant in this study conform to the beach lovers (sun and beach) category followed by coastal passive (water sports and social passive) with coastal nature (ecotourism) being the least prominent. Yet, as indicated in the literature review chapter, most research focuses on marine tourism activities including whale watching and shark diving which is particularly notable in the South African context. Thus, the current focus in the literature does not correlate with activities that have the greatest participation rates and demand. Looking more comprehensively at visitor profiles (that is, not only focusing only on tourists) and activities that they participate in (beyond specific activities as many studies do) provides an important contribution to the body of knowledge on CMT locations. Another aspect is to better understand other activities (than those directly related to CMT) that visitors participate in which is discussed next.

Table 4.9 shows activities respondents participated in or planned to participate in during their visit to the CMT location other than coastal and marine activities discussed earlier. The combination of activities that CMT site visitors participate in are central to establishing their profiles and interests which contribute to sustainably managing these locations as well as ensuring that products, services and amenities are in place to improve destination marketing. The main activity identified that respondents participated in was adventure (52%) with substantial provincial differences (63% in the Western Cape, 48% in KwaZulu-Natal and 43% in the Eastern Cape). The results support Giddy (2018) and Marafa and Chau's (2016) research that show that CMT activities are closely associated with and link to adventure tourism activities. In the South African context, it will be important to monitor growth in adventure tourism because of investments and growth in

commercial adventure tourism operations and activities as shown by Giddy (2018).

The next main activity identified that respondents participated in was food and wine (35%) with almost equal proportions across all the provinces (36% in the Western Cape and 35% in both the Eastern Cape and KwaZulu-Natal). Food consumption is identified as one of the main activities associated with tourism generally and CMT specifically (NDT, 2016; UNEP, 2009). Additionally, Gurning (2018) and Hall (2001) state that the price of food (as well as accommodation and transportation) are the main costs that visitors consider when making a decision to come to a destination.

Food and wine was followed by shopping and social (visiting friends and relatives) activities identified by 22% of the respondents. In terms of the provincial comparisons, in relation to shopping, 31% of the respondents in the Eastern Cape, 20% in the Western Cape and 19% in KwaZulu-Natal participated in or planned to participate in this activity. Slater and Mearns (2018) also identified shopping facilities and services as an aspect that influenced visitor perceptions of beaches and preferences in South Africa. It is important to note that some visitors found proximity to shops as being distracting to their experiences on the coast. Social activities has the highest proportion of respondents in KwaZulu-Natal (28%), followed by the Eastern Cape (22%) and the Western Cape (15%).

Fourteen percent of the respondents (28% in the Western Cape, 10% in the Eastern Cape and 2% in KwaZulu-Natal) participated in or planned to participate in culture/ heritage activities. This is surprising given that KwaZulu-Natal is home to Zulu culture which is well known globally and it the most dominant cultural group in South Africa (Tourism KwaZulu-Natal, 2019). This may be due to the fact that many of these attractions are located inland and not in coastal areas. This could also reflect that that CMT in South Africa is not well integrated with other tourism products in the country. Twelve percent of the respondents (23% in the Western Cape, 9% in the Eastern Cape and 5% in KwaZulu-Natal) participated in or planned to participate in business activities. Ten percent of the respondents (17% in the Eastern Cape, 8% in the Western Cape and 6% in KwaZulu-Natal) participated in or planned to participate in nightlife activities. Other activities were identified that had less than 10% responses were visiting natural attractions/ wildlife that were not

coastal/ marine (6% in total: 12% in the Eastern Cape and 5% each in KwaZulu-Natal and the Western Cape), visiting a casino (6% in total: 10% in the Eastern Cape, 6% in KwaZulu-Natal and 3% in the Western Cape), visiting theme parks (6% in total: 6% each in the Eastern Cape and Western Cape and 5% in KwaZulu-Natal), conferences (2% in total: 4% in the Eastern Cape, 3% in the Western Cape and 1% in KwaZulu-Natal), show performances (1% in total: 3% in the Eastern Cape and 1% each in KwaZulu-Natal and the Western Cape) and medical (0.5% in total: 1% each in KwaZulu-Natal and the Western Cape).

Differences were noted among the provinces in relation to most of the main activities with the exception of food and wine, and visiting theme parks. This is also reinforced by the chi-squared tests results were it was found that there were statistically significant relationships between the provinces and all activities with the exception of food and wine, visiting theme parks and medical with p values of more than 0.005. Thus, the importance of comparing different locations as this study does in relation to the three coastal provinces is again reinforced to unpack differences and similarities. It is also important to note that unlike CMT activities discussed previously where KwaZulu-Natal had higher responses than the Western Cape in terms of participation, in relation to non-CMT activities, the results indicate that higher proportions of respondents participated or planned to participate in these activities followed by the Eastern Cape with the least responses for most activities in KwaZulu-Natal. The results also indicate location specific dynamics and provincial differences.

Table 4.9: Main activities respondent intended to participate in/ participated in during visit to location where interview was held other than coastal and marine activities as well as chi-squared p values (n=3026, in %): Multiple responses - yes responses only

	Eastern Cape (n=700)	KwaZulu-Natal (n=1218)	Western Cape (n=1108)	Total (n=3026)	P values
Adventure	43	48	63	52	0.000
Food and wine	35	35	36	35	0.713
Shopping	31	19	20	22	0.000
Social (visiting friends and relatives)	22	28	15	22	0.000
Culture/ heritage	10	2	28	14	0.000
Business	9	5	23	12	0.000
Nightlife	17	6	8	10	0.000
Sport	5	3	12	7	0.000
Visiting natural attractions/ wildlife that were not coastal/ marine	12	5	5	6	0.000
Visiting theme parks	6	5	6	6	0.909
Visiting a casino	10	6	3	6	0.000
Conference	4	1	3	2	0.000
Show performances	3	1	1	1	0.000
Medical	-	1	1	.5	0.118

The average number of times that respondents previously participated in CMT activity/ activities in South Africa was 12 and ranged from none to 1 000. In the Eastern Cape, the average number of times that respondents previously participated in CMT activity/ activities was 10 and ranged from none to 365. In KwaZulu-Natal, the average number of times that respondents previously participated in CMT activity/ activities was 19 and ranged from none to 1 000. In the Western Cape, the average number of times that respondents previously participated in CMT activity/ activities was 6 and ranged from none to 507. The higher numbers were local residents who lived in close proximity to the beach locations and visited the areas regularly.

Most of the respondents (52% in total: 58% in the Eastern Cape, 56% in KwaZulu-Natal and 47% in the Western Cape) indicated that they previously participated in CMT activity/ activities in South Africa between 1-5 times (Table 4.10). Nine percent of the respondents (11% in the Eastern Cape, 10% in KwaZulu-Natal and 6% in the Western Cape) indicated that they previously participated in CMT activity/ activities in South Africa between 6-10 times. Seven percent of the respondents indicated that they previously participated in CMT activity/ activities in South Africa between 11-20 times (12% in KwaZulu-Natal, 6% in the Eastern Cape and 4% in the Western Cape) and 21-50 times (9% in KwaZulu-Natal, 7% in the Eastern Cape and 4% in the Western Cape). Three percent and 1% of the respondents, respectively, stated that they previously participated in CMT activity/ activities in South Africa between 51-100 times and more than 100 times. For 18% of the respondents (38% in the Western Cape, 11% in the Eastern Cape and 3% in KwaZulu-Natal), the visit when the interview was conducted was the first time they participated in CMT activity/ activities in South Africa. The higher proportions coincide in provinces with higher numbers of foreign (the Western Cape) and domestic (KwaZulu-Natal) tourists.

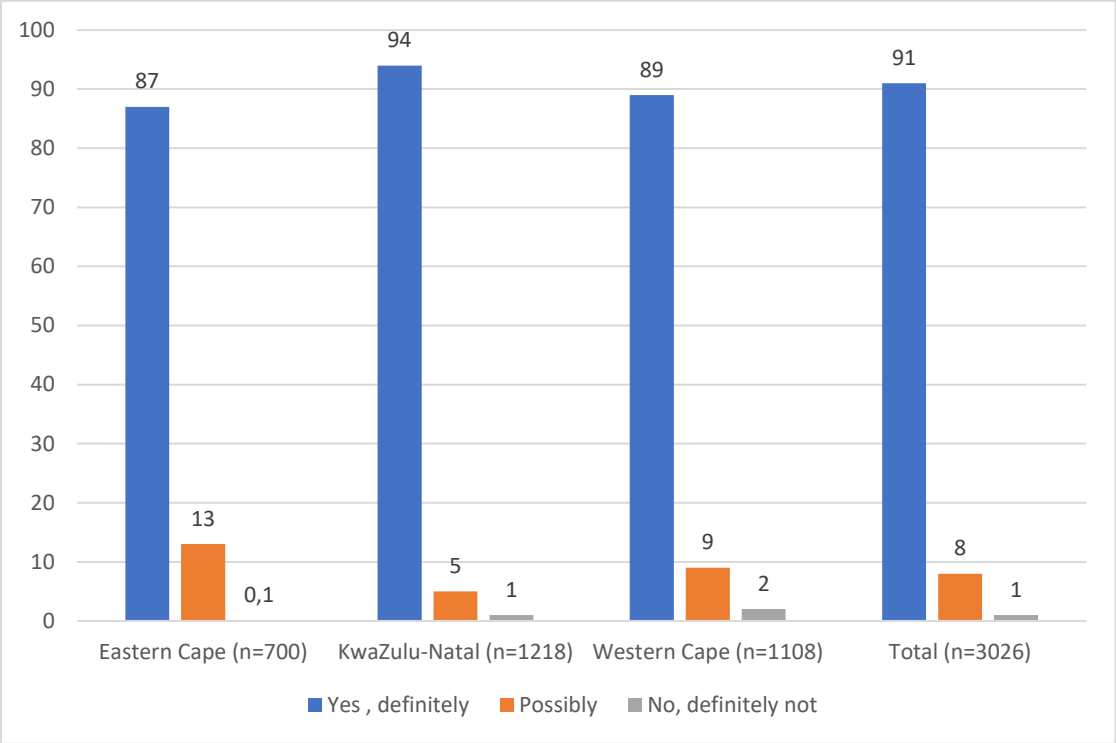
The results suggest that CMT locations have repeat visitors and attracts new visitors. The findings also denote that a higher number of repeat visitation is experienced in KwaZulu-Natal and the lowest in the Western Cape which could be linked to more visitors in KwaZulu-Natal being locals and day-trippers who could visit more regularly as compared to the Western Cape that had a higher number of foreign visitors. Understanding repeat visitation patterns assist to effectively develop marketing strategies and instituting management measures as indicated by Schuhmann et al. (2019). Repeat visitation is also indicative of overall satisfaction with destination experiences and positive word-of-mouth marketing as shown by Carvache-Franco et al. (2019a; 2019b), Jarvis et al. (2016) and Kim (2014).

Table 4.10: Number of times respondents previously participated in CMT activity/ activities in South Africa (n=3026, in %)

	Eastern Cape (n=700)	KwaZulu-Natal (n=1218)	Western Cape (n=1108)	Total (n=3026)
No response	3	4	.4	3
None	11	3	38	18
1	11	10	18	13
2	14	11	7	10
3	14	12	8	11
4	9	10	5	8
5	11	13	9	11
6-10	11	10	6	9
11-20	6	12	4	7
21-50	7	9	4	7
51-100	3	5	1	3
> 100	.1	2	1	1

Almost all the respondents (99% in all the provinces) indicated that they would participate in this/ these types of CMT activity/ activities again in South Africa which suggests that there are high levels of satisfaction among CMT location visitors in South Africa. The satisfaction with experiences at the CMT destinations visited was further reflected with 91% of the respondents (94% in KwaZulu-Natal, 89% in the Western Cape and 87% in the Eastern Cape) indicating that they would advise friends, relatives or colleagues to participate in this/ these type/s of CMT activity/ activities in South Africa (Figure 4.3). Only 1% stated that they would not and 8% (13% in the Eastern Cape, 9% in the Western Cape and 5% in KwaZulu-Natal) indicated possibly.

Figure 4.3: If respondent would advise friends, relatives and/ or colleagues to participate in CMT activity/ activities in South Africa (n=3026, in %)



As Jarvis et al. (2016) indicate, repeat visitation (as well as willingness to recommend a destination to others) is affected mostly by past experiences at a destination, trip cost or perceived value for money, facilities and services at the destination, and (in the case of CMT in particular), the perceived quality of the natural environment. Thus, the results in this study generally reveal high satisfaction levels at CMT sites which are reflected in the extent of repeat visitation and high proportion of respondents who would advise friends and relatives to visit the CMT location.

4.5. Visitor spend patterns

The average group size among the visitors interviewed was 3, and ranged from none to 33. In the Eastern Cape, the average group size was 3 and ranged from none to 22. In KwaZulu-Natal, the average group size was 4 and ranged from none to 33. In the Western Cape, the average group size was 2 and ranged from none to 13. Nine percent of the respondents (18% in the Western Cape and

3% each in the Eastern Cape and KwaZulu-Natal) indicated none (they were alone) (Table 4.11). Most of the respondents indicated that 1 (24% in total: 38% in the Western Cape, 22% in the Eastern Cape and 13% in KwaZulu-Natal) or 2 (25% in total: 31% in the Eastern Cape, 26% in the Western Cape and 20% in KwaZulu-Natal) persons accompanied the respondents as part of their immediate groups. Among the rest, most were in groups of 3-5 persons (32% in total: 45% in KwaZulu-Natal, 37% in the Eastern Cape and 16% in the Western Cape). Seven percent of the respondents (12% in KwaZulu-Natal, 7% in the Eastern Cape and 1% in the Western Cape) were in groups of 6-10 persons with only 3% indicating that they were in groups of more than 10 persons. The provincial differences are reinforced with a chi-squared test value of p=0.000.

The results again link to the Western Cape having more foreign visitors who tend to travel in smaller groups compared to locals and domestic travelers. Foreign visitors also tend to spend more. However, for most CMT location visitors the social dimension is evident with most being accompanied by immediate family members and/ or friends.

Table 4.11: Number of persons accompanying respondents who are paying for or spending money together as a group (that is, respondents' immediate group size) who are also participating in the CMT activity (n=3026)

	Eastern Cape (n=700)	KwaZulu-Natal (n=1218)	Western Cape (n=1108)	Total (n=3026)
No response	-	-	.3	.1
None	3	3	18	9
1	22	13	38	24
2	31	20	26	25
3	17	16	7	13
4	13	18	6	12
5	7	11	3	7
6 - 10	7	12	1	7
> 10	1	6	.2	3

Table 4.12 indicates the current and potential spend patterns among respondents in relation to specific categories. It is important to note that almost all the respondents (97% in total: 99% in the Western Cape, 98% in KwaZulu-Natal and 93% in the Eastern Cape) spent some money during their visit to the CMT location, indicating the economic value of CMT activities and destinations as highlighted in the literature (Fraguell et al.; 2016; Glaesser et al., 2017; Papageorgiou, 2016; Potgieter, 2018; Rogerson et al., 2018). The main category of current and potential spend was food and drinks with 92% of the respondents (97% in the Western Cape, 92% in KwaZulu-Natal and 83% in the Eastern Cape) indicating spend in this category. As indicated earlier (Glaesser et al., 2017; Papageorgiou, 2016), most respondents visiting tourism locations (including local residents) spend money on food which is the trend in this study as well as indicated in Table 4.12.

Other main categories of spend for all visitors were transportation within coastal/ marine location (46% in total: 58% in KwaZulu-Natal, 53% in the Eastern Cape and 27% in the Western Cape) and shopping (43% in total: 48% in the Western Cape, 41% in the Eastern Cape and 39% in KwaZulu-Natal). Direct CMT spend was in relation to payment for CMT products/ activities (28% in total: 45% in the Western Cape, 20% in KwaZulu-Natal and 13% in the Eastern Cape) and CMT activity merchandize (19% in total: 28% in the Western Cape, 15% in the Eastern Cape and 13% in KwaZulu-Natal). Spend on other items was identified by 23% of the respondents (31% in the Western Cape, 20% in the Eastern Cape and 16% in KwaZulu-Natal).

In relation to categories of spend categories specific to tourists, most spent or would spend on transportation during visit, including airfares and travel within South Africa only (53% in total: 63% in the Western Cape, 51% in KwaZulu-Natal and 39% in the Eastern Cape) followed by accommodation at coastal/ marine locations only (33% in total: 37% in KwaZulu-Natal, 36% in the Eastern Cape and 27% in the Western Cape) and accommodation outside coastal/ marine locations (27% in total: 56% in the Western Cape, 11% in the Eastern Cape and 9% in KwaZulu-Natal). The results suggest that although the Western Cape has the highest proportion of foreign tourists, visitors tend to stay outside CMT locations. Further research is required to establish the reasons for staying outside these locations that may relate to cost, congestion, preferring to stay with friends and family, or other reasons. The provincial differences again are likely to be associated with the number of foreign, domestic and local visitors.

Table 4.12: Item categories respondents spent or would spend (inclusive of the immediate group respondent spent money for) in relation to participating in CMT activities during visit at the specific coastal/ marine location (n=3026)

	Eastern Cape (n=700)	KwaZulu-Natal (n=1218)	Western Cape (n=1108)	Total (n=3026)
Payment for CMT products/ activities (e.g. whale watching, shark diving, turtle tours, boat-based fishing)	13	20	45	28
Food and drinks	83	92	97	92
CMT activity merchandise	15	13	28	19
Shopping	41	39	48	43
Transportation within coastal/ marine location	53	58	27	46
Transportation during visit, including airfares and travel within South Africa only (**for tourists only**)	39	51	63	53
Accommodation at coastal/ marine locations only (**for tourists only**)	36	37	27	33
Accommodation outside coastal/ marine locations (**for tourists only**)	11	9	56	27
Other (e.g. entertainment, visits to attractions)	20	16	31	23
Total that spent some money during visit	93	98	99	97

The primary/ main reason for visiting a tourist destination is important to consider since it is indicative of the extent to which specific products and activities attract visitors to a location. As Eagleton and du Plessis (2019) assert, why specific beachgoers choose particular destinations is important to consider since it links the profile of visitors to their motives. It also reveals how visiting a CMT destination is often associated with other activities that influence where people visit and spend their time and money. Table 4.13 shows that the majority of the respondents stated that their primary reason for visiting the CMT location where the interview was held, was participation in CMT activity in the beach/ coastal location (37% in total: 41% in the Western Cape, 39% in KwaZulu-Natal and 27% in the Eastern Cape) or holidays (38% in total: 44% each in the Eastern Cape and KwaZulu-Natal and 28% in the Western Cape). Respondents also

identified visiting friends and relatives (10% in total: 13% in the Eastern Cape, 10% in the Western Cape and 8% in KwaZulu-Natal) and business (10% in total: 16% in the Western Cape, 9% in the Eastern Cape and 4% in KwaZulu-Natal). A few (2% and 3%, respectively) indicated shopping and other reasons.

Table 4.13: Primary/ main reason for visiting location where the coastal or marine activity respondent was participating in was taking place (n=3026, in %)

	Eastern Cape (n=700)	KwaZulu-Natal (n=1218)	Western Cape (n=1108)	Total (n=3026)
Participation in CMT activity in this beach/ coastal location	27	39	41	37
Holiday	44	44	28	38
Business	9	4	16	10
Visiting friends and relatives	13	8	10	10
Shopping	6	.2	.4	2
Other	1	5	4	3

Transportation at the destination is also an important aspect to consider in relation to CMT since it influences visitor and resident experiences, being one of the main sources of congestion in these locations (Penn et al., 2016)). The main modes of transportation respondents used to travel from where they were residing on the day when the interview was conducted (place of accommodation for visitors or place of residence for locals) to the CMT location were private (42% in total: 61% in KwaZulu-Natal, 51% in the Eastern Cape and 16% in the Western Cape) and rental vehicles (19% in total: 30% in the Western Cape, 17% in the Eastern Cape and 9% in KwaZulu-Natal) (Table 4.14). Other main types of motorized transport used by the respondents were metered taxi (11% in total: 18% in the Western Cape, 14% in the Eastern Cape and 4% in KwaZulu-Natal), minibus taxi (9% in total: 15% in KwaZulu-Natal, 10% in the Eastern Cape and 3% in the Western Cape) and bus (8% in total: 19% in the Western Cape, 4% in the Eastern Cape and 1% in KwaZulu-Natal). A substantial proportion of respondents (17% in total: 33% in the Western Cape, 8% in KwaZulu-Natal and 7% in the Eastern Cape) also walked to the CMT destination. A few respondents stated bicycled, flight and train.

The results indicate provincial differences in relation to the type of transport used. Despite these differences, the dominance of vehicle use to get to the CMT location is evident, and could raise issues in relation to environmental considerations and infrastructural demands such as the need for parking facilities.

Table 4.14: Mode of transport from respondents' residence/ accommodation to CMT location on the day the interview was held (n=3026)

	Eastern Cape (n=700)	KwaZulu-Natal (n=1218)	Western Cape (n=1108)	Total (n=3026)
Private vehicle	51	61	16	42
Rental vehicle	17	9	30	19
Metered taxi (e.g. Uber)	14	4	18	11
Minibus taxi	10	15	3	9
Bus	4	1	19	8.4
Walked	7	8	32	17
Bicycled	.1	.1	1	.3
Flight	.4	.1	-	.1
Train	-	.1	1	.4

4.6. Visitor perceptions of the CMT location

In this study, as indicated in the previous chapter, respondents were asked to rate their experience with various elements of the CMT location where they were interviewed. Likert style questions were used for respondents to choose their level of agreement with specific statements which are discussed in this section.

The first statement ('the location is well maintained') was intended to provide a general overview of the location. As indicated by Carvache-Franco et al. (2019a; 2019b), Gössling et al. (2016), Jarvis et al. (2016), Kim (2014) and Lucrezi et al. (2016), general impressions of a location

influence visitor experiences, repeat visitation and word-of-mouth marketing. Additionally, Dodd and Holmes (2019) identify overall visitor experience as one of the main aspects (in addition to satisfaction with facilities and the beach/ location) that influence visitor demographics and repeat visitation. This position is also supported by Jarvis et al. (2016) who assert that while several factors influence repeat visitation to a destination, overall trip satisfaction is the most important one.

The results depicted in Table 4.15 indicate that a substantial majority of the respondents agreed or strongly agreed (82%) that 'the location is well maintained' with the Western Cape having the highest responses (89%) followed by the Eastern Cape (82%) and the least responses were in KwaZulu-Natal (76%). Among the rest of the respondents, 10% were neutral (14% in the Eastern Cape, 10% in KwaZulu-Natal and 8% in the Western Cape) and 8% disagreed or strongly disagreed (14% in KwaZulu-Natal and 4% each in the Eastern Cape and the Western Cape). It is important to note that some respondents are willing to pay extra to ensure that CMT locations are well maintained and conditions are improved as indicated by Penn et al. (2016).

Table 4.15: Level of agreement with statement 'Well maintained location' about coastal/ marine location (not town/ city as a whole) (n=3026, in %)

	Eastern Cape (n=700)	KwaZulu-Natal (n=1218)	Western Cape (n=1108)	Total (n=3026)
Strongly disagree	1	4	2	2
Disagree	3	10	2	6
Neutral	14	10	8	10
Agree	51	42	34	41
Strongly agree	31	34	55	41

Parking is an important aspect to consider, especially in contexts where there is high reliance on non-public and/ or non-motorized transport as is the case in all provinces in South Africa as indicated earlier. The results indicate that 62% of the respondents agreed or strongly agreed that 'parking is adequate' (Table 4.16). The Western Cape had the highest responses (71%) which was substantially higher than the Eastern Cape (59%) and KwaZulu-Natal (55%) that had the least

responses. Among the rest of the respondents, 20% were neutral (29% in the Eastern Cape, 20% in KwaZulu-Natal and 14% in the Western Cape), mainly from visitors who used public transport or walked to the location, and 19% disagreed or strongly disagreed (26% in KwaZulu-Natal, 15% in the Western Cape and 13% in the Eastern Cape). Parking was found to be an important aspect to consider by Slater and Mearns (2018) and Snider et al. (2015). There was a general preference for respondents to have parking closer to the beach. This could not only be for convenience and to have easier access to the beaches, but also may be indicative of safety concerns.

Table 4.16: Level of agreement with statement 'Parking is adequate' about coastal/ marine location (not town/ city as a whole) (n=3026, in %)

	Eastern Cape (n=700)	KwaZulu-Natal (n=1218)	Western Cape (n=1108)	Total (n=3026)
Strongly disagree	2	9	9	7
Disagree	11	17	6	12
Neutral	29	20	13	20
Agree	36	27	43	35
Strongly agree	23	28	28	27

Facilities and amenities also influence visitor experiences and perceptions at specific locations as indicated by Dodd and Holmes (2019), Gurning (2018), Jarvis et al. (2016), Lucrezi et al. (2018), Saayman (2017), Snider et al. (2015) and Tegar and Gurning (2018). The results indicate that 58% of the respondents agreed or strongly agreed with the statement 'sufficient facilities and amenities' (Table 4.17). The Western Cape had the highest responses (76%) which was substantially higher than the Eastern Cape (48%) and KwaZulu-Natal (43%) that had the least responses. Among the rest of the respondents, 20% were neutral (30% in the Eastern Cape, 19% in KwaZulu-Natal and 15% in the Western Cape) and 22% disagreed or strongly disagreed (35% in KwaZulu-Natal, 22% in the Eastern Cape and 9% in the Western Cape). Adequate and quality facilities and amenities at CMT locations contribute to positive experiences as noted by Blignaut et al. (2016). The presence or absence of facilities and amenities are also indicative of the quality of the destination as stated by Penn et al. (2016). Liu et al. (2019) and Oh et al. (2010) caution, however, that increased

demand for facilities and amenities can undermine the natural environment as well as increase demand and visitation at the CMT locations that can have negative impacts, including attracting tourists who spend money at these destinations. Again, the importance of balancing development and demand with ecological and environmental considerations emerge.

Table 4.17: Level of agreement with statement 'Sufficient facilities and amenities (for example, toilets)' about coastal/ marine location (not town/ city as a whole) (n=3026, in %)

	Eastern Cape (n=700)	KwaZulu-Natal (n=1218)	Western Cape (n=1108)	Total (n=3026)
Strongly disagree	7	12	5	8
Disagree	15	23	4	14
Neutral	30	19	15	20
Agree	29	21	32	28
Strongly agree	19	23	44	30

As indicated earlier, consumption of food is the activity that almost all respondents visiting CMT locations partake in. The results indicate that 70% of the respondents agreed or strongly agreed with the statement 'good refreshment areas/ food variety' (Table 4.18). The Western Cape had the highest responses (81%) which was substantially higher than the Eastern Cape (72%) and KwaZulu-Natal (60%) that had the least responses. Among the rest of the respondents, 13% were neutral (16% in the Eastern Cape, 13% in KwaZulu-Natal and 11% in the Western Cape) and 16% disagreed or strongly disagreed (28% in KwaZulu-Natal, 12% in the Eastern Cape and 7% in the Western Cape).

Table 4.18: Level of agreement with statement 'Good refreshment areas/ food variety' about coastal/ marine location (not town/ city as a whole) (n=3026, in %)

	Eastern Cape (n=700)	KwaZulu-Natal (n=1218)	Western Cape (n=1108)	Total (n=3026)
Strongly disagree	4	10	3	6
Disagree	8	18	4	10
Neutral	16	13	11	13
Agree	46	33	39	38
Strongly agree	26	27	42	32

The environment considerations and sensitivities associated with maintaining the integrity of the natural resource base and sustainability more generally are important issues to consider as raised in the literature (Cañavate et al., 2019; Ghosh and Datta, 2017; Joseph, 2017; Liu et al., 2019; Marafa and Chau, 2016). Additionally, these authors indicate that there are increasing concerns in relation to the sustainability of coastal and marine environments associated with unsustainable consumption, degradation associated with CMT and other demands/ developments in these locations, and threats associated with climate change. The results indicate that 61% of the respondents agreed or strongly agreed with the statement 'this is a green location that encourages responsible environmental practices' (Table 4.19). The Western Cape had the highest responses (74%) which was substantially higher than KwaZulu-Natal (58%) and the Eastern Cape (47%) that had the least responses. Among the rest of the respondents, 27% were neutral (40% in the Eastern Cape, 24% in KwaZulu-Natal and 20% in the Western Cape) and 13% disagreed or strongly disagreed (18% in KwaZulu-Natal, 13% in the Eastern Cape and 5% in the Western Cape). The neutral responses could indicate that some visitors are not aware of the environmental issues related to CMT.

Table 4.19: Level of agreement with statement 'This is a green location that encourages responsible environmental practices (for example, recycling)' about coastal/ marine location (not town/ city as a whole) (n=3026, in %)

	Eastern Cape (n=700)	KwaZulu-Natal (n=1218)	Western Cape (n=1108)	Total (n=3026)
Strongly disagree	3	3	1	3
Disagree	10	15	4	10
Neutral	40	24	20	27
Agree	28	26	36	30
Strongly agree	19	32	38	31

Signage is also an indication of how well a location is maintained and managed as noted by Slater and Mearns (2018). The results indicate that 74% of the respondents agreed or strongly agreed that 'signage to location was clear' (Table 4.20). The Western Cape had the highest responses (82%) which was substantially higher than KwaZulu-Natal (72%) and the Eastern Cape (65%) that had the least responses. Among the rest of the respondents, 15% were neutral (24% in the Eastern Cape, 13% in the Western Cape and 12% in KwaZulu-Natal) and 11% disagreed or strongly disagreed (16% in KwaZulu-Natal, 11% in the Eastern Cape and 5% in the Western Cape).

Table 4.20: Level of agreement with statement 'Signage to location was clear' about coastal/ marine location (not town/ city as a whole) (n=3026, in %)

	Eastern Cape (n=700)	KwaZulu-Natal (n=1218)	Western Cape (n=1108)	Total (n=3026)
Strongly disagree	3	5	1	3
Disagree	8	11	4	8
Neutral	24	12	13	15
Agree	46	44	39	43
Strongly agree	19	28	43	31

Security and safety is an important aspect that influences visitor destination preferences and experiences as noted by Chen and Teng (2016), Eagleton and du Plessis (2019), Tegar and Gurning (2018), Jarvis et al. (2016), Lucrezi et al. (2016), Peña-Alonso et al. (2018) and Penn et al. (2016). The results indicate that 72% of the respondents agreed or strongly agreed with 'safe location' (Table 4.21). The Western Cape had the highest responses (82%) which was substantially higher than KwaZulu-Natal (69%) and the Eastern Cape (64%) that had the least responses. Among the rest of the respondents, 15% were neutral (24% in the Eastern Cape, 14% in the Western Cape and 11% in KwaZulu-Natal) and 13% disagreed or strongly disagreed (20% in KwaZulu-Natal, 13% in the Eastern Cape and 4% in the Western Cape). The level of agreement that the CMT destinations were deemed to be safe locations differed from the general perceptions of South Africa as a tourist destination as indicated by Ahmed et al. (2008) and concerns about safety as raised by Potgieter (2018) and Walker (2018). This could be indicative of higher levels of security presence in these locations or that many CMT locations are located further away from built and highly populated areas.

Table 4.21: Level of agreement with statement 'Safe location' about coastal/ marine location (not town/ city as a whole) (n=3026, in %)

	Eastern Cape (n=700)	KwaZulu-Natal (n=1218)	Western Cape (n=1108)	Total (n=3026)
Strongly disagree	3	6	2	4
Disagree	10	14	2	9
Neutral	24	11	14	15
Agree	42	40	36	39
Strongly agree	22	29	46	33

Entertainment opportunities are important to consider since visitors tend to enjoy participating in multiple activities when visiting CMT locations as the results in this study reveals. Table 4.2 shows the level of agreement with statement 'Entertainment opportunities available in the location' about coastal/ marine location. The results indicate that 63% of the respondents agreed or strongly agreed that there are 'entertainment opportunities available in the location'. The Western Cape had the highest responses (74%) which was substantially higher than the Eastern Cape (57%) and

KwaZulu-Natal (56%) that had the least responses. Among the rest of the respondents, 18% were neutral (26% in the Eastern Cape, 17% in KwaZulu-Natal and 14% in the Western Cape) and 20% disagreed or strongly disagreed (27% in KwaZulu-Natal, 18% in the Eastern Cape and 12% in the Western Cape). This illustrates the recreational and leisure value of beach locations, indicating the importance of better understanding CMT in South Africa which is a key component of the aim and objectives of the study.

Table 4.22: Level of agreement with statement 'Entertainment opportunities available in the location' about coastal/ marine location (not town/ city as a whole) (n=3026, in %)

	Eastern Cape (n=700)	KwaZulu-Natal (n=1218)	Western Cape (n=1108)	Total (n=3026)
Strongly disagree	7	9	4	7
Disagree	11	18	8	13
Neutral	26	17	14	18
Agree	39	33	33	35
Strongly agree	18	23	41	28

Crowding is noted by Chen and Teng (2016), Jarvis et al. (2016), Krelling et al. (2017) and Oh et al. (2010) as impacting on experiences at CMT locations. Crowding can also be reflective of unsustainable practices and demands on coastal and marine environments that can undermine valuable ecosystem services as noted by Rudianto et al. (2019). The results indicate that 50% of the respondents agreed or strongly agreed that the 'location is too crowded' (Table 4.23). The Western Cape had the highest responses (76%) which was substantially higher than KwaZulu-Natal (38%) and the Eastern Cape (31%) that had the least responses. Among the rest of the respondents, 14% were neutral (24% in the Eastern Cape, 17% in KwaZulu-Natal and 14% in the Western Cape) and 36% disagreed or strongly disagreed (52% in KwaZulu-Natal, 46% in the Eastern Cape and 12% in the Western Cape). The responses in relation to crowding at the location is surprising since the Western Cape had the highest levels of agreements that the locations were crowded but also had higher satisfaction levels for other aspects that denote higher levels of satisfaction despite the crowding experienced. Further research should be undertaken to examine

the relationships between crowding and satisfaction levels at CMT locations, including what constitutes crowding and how it is perceived by visitors. This requires more probing questions and also the inclusion of qualitative research approaches to examine these aspects.

Table 4.23: Level of agreement with statement 'Location is too crowded' about coastal/ marine location (not town/ city as a whole) (n=3026, in %)

	Eastern Cape (n=700)	KwaZulu-Natal (n=1218)	Western Cape (n=1108)	Total (n=3026)
Strongly disagree	22	24	5	17
Disagree	24	28	7	19
Neutral	24	11	11	14
Agree	17	24	21	21
Strongly agree	14	14	55	29

The responses indicate that there were differences across the three provinces, with the Western Cape having the highest levels of satisfaction in relation to different aspects. The only exception in the Western Cape was that it had the highest responses who indicated that "crowding" was experienced. KwaZulu-Natal reflects the least levels of satisfaction in relation to the rest of the aspects: location being well maintained, parking being inadequate, locations having sufficient facilities and amenities, having good refreshment areas/ food variety, being a green location, signage, being a safe location and entertainment opportunities.

In relation to the specific aspects examined, higher levels of satisfaction were expressed in relation to perceptions about the locations being well maintained, availability of good refreshment areas/ food variety, signage to the location and safe location. Lower levels of satisfaction were expressed in relation to parking being adequate, provision of facilities and amenities, areas being viewed as green locations and entertainment opportunities being available. Location being crowded was the only statement to have 50% of the respondents agree or strongly agree with the statement, which was the lowest. Despite the differences, the responses reflect general satisfaction with the CMT experiences as noted earlier. The aspects that indicate lower levels of satisfaction are generally linked to services and infrastructural provision in these areas that allude to the need to better

manage CMT locations, especially in KwaZulu-Natal and the Eastern Cape that had lower levels of satisfaction.

4.7. Conclusion

This chapter presented and analyzed findings of this study using provincial crosstabulations. Results were presented in Tables and Figures in percentages. The comparisons, where appropriate, also included p values derived from chi-squared tests to assess whether there were statistically significant relationships between the provinces and selected variables. The discussion entailed a description of the findings as well as an integration of key aspects relating to the literature reviewed in Chapter Two. The next chapter presents a summary of the main findings emanating from the research, specifically in relation to the research objectives presented in the introductory chapter. Thereafter, pertinent recommendations (in addition to those highlighted in this chapter) arising from the research results are presented together with final concluding remarks.

CHAPTER FIVE
CONCLUSION

5.1. Introduction

This chapter provides a summary of the key findings obtained during the data analyzes of this study. Specifically, the findings are first summarized in relation to each of the study's research objectives including the socio-economic profiles and types of CMT visitors, spending patterns among visitors, types of CMT products consumed/ participated in and reasons for visiting CMT locations. Thereafter, the chapter forwards recommendations relating to the aspects examined in the study. Concluding remarks are then outlined.

5.2. Summary of key results

This section provides a summary of the key results in relation to the four objectives presented in Chapter One that frames this research. Firstly, the socio-economic profiles and types of CMT visitors are discussed followed by spending patterns among the CMT visitors. Thereafter, the types of CMT products/ activities visitors consume or participate in are examined together with future interest in these products/ activities. Finally, the main reasons for visiting specific CMT locations and visitors perceptions of these destinations are summarized. Provincial similarities and differences are highlighted, since this is the main contribution that this study attempts to make to the field of CMT research.

The literature review revealed the importance of tourism to economic development in tourism destinations as well as regional, national and global GDPs. In relation to CMT specifically, there is widespread consensus that this sub-sector is the most prominent, representing the largest component of tourism both in terms of visitation and growth. Numerous demands are placed in coastal and marine locations (such as residential and business development, commercial fishing and aquaculture, maritime transport and port development, and offshore oil and gas exploration) with CMT being one of the most important of the human activities in these locations. There is an

increasing need to balance and manage these competing demands to ensure sustainability, including the conservation and preservation of environmental and cultural heritage resources in these areas. The social, economic and environmental values of coastal and marine environments are well established. It is also acknowledged that CMT offer opportunities and pose challenges and risks, especially in the context of climate change impacts as well as the environmental sensitivity and vulnerabilities associated with coastal and marine ecosystems.

In the context of the importance of CMT, especially in South Africa, it is important to examine visitor profiles. The literature reveals that key socio-demographic variables that current visitor profile studies include are age, gender, place of residence, income levels, level of education, group size, spend patterns, length of stay, previous visitation, and participation in CMT and non-CMT activities. This study includes these variables with the exception of length of stay. Who visits CMT locations tend to be influenced by a range of factors that are highlighted in the literature which include the destination itself (including attractions, activities and the natural resource base which relate to the image of the location), amenities and facilities at the destination, and ease and cost of travel. An important aspect relevant to this research that emerges in the literature review is that CMT research tends to focus on tourists when examining visitor profiles, which is the case in South Africa as well with most studies that examine visitor profiles focusing on specific types of CMT activities such as whale watching. However, locals and day-trippers also frequent these areas and should be considered as this research includes. Socio-demographic variables also influence visitor satisfaction (that influence perceptions which is an important focus of this study) and choice of destination.

The literature also reveals the importance of CMT visitor perception studies. Linked to perceptions are experiences which influence how a destination is viewed. Studies reveal that experiences at a destination (especially satisfaction levels) that influence perceptions impact on which destination visitors choose to visit, how much visitors spend at a location, their behaviors and practices, repeat visitation and positive word-of-mouth marketing. These aspects in turn influence visitor spend and willingness to contribute to conservation efforts. Factors that influence visitor perceptions are visitor demographics, CMT destination characteristics, satisfaction with facilities and amenities, perceived value for money/ costs, and water and beach quality. The values of examining CMT

visitor perceptions is noted in the literature which include informing planning and management strategies, specifically sustainable management practices and policies.

5.2.1. Socio-economic profiles and types of CMT visitors in the Eastern Cape, KwaZulu-Natal and Western Cape

In relation to age of the visitors, the findings show that adult visitors who frequented coastal and marine areas where the interviews were conducted, were from a range of age groups with younger and middle aged groups being more dominant. The average age of respondents was higher in the Western Cape compared to the Eastern Cape and KwaZulu-Natal. In terms of the gender of the visitors interviewed, almost equal proportions were males and females in all provinces. There were variations in relation to the place of residence of the respondents with almost all of the respondents in KwaZulu-Natal and the Eastern Cape being from South Africa, while less than half of the respondents were from South Africa in the Western Cape. The results reinforce the Western Cape's position as the main foreign tourist destination in the country. In relation to domestic tourism, the findings also align to KwaZulu-Natal being the main domestic tourism destination. In relation to the highest level of education attained, almost all the respondents had matric or post-matric qualifications with noticeable differences discernible among the provinces, notably more respondents in the Western Cape having undergraduate degrees and postgraduate degrees as compared to the Eastern Cape and KwaZulu-Natal. This could be associated with the Western Cape having more foreign visitors and tourists who tend to be better educated. Similar to the educational levels, higher levels of income were noted in relation to travelers visiting the CMT locations from outside the local area.

In terms of type of visitors, this study reveals the importance of examining non-tourist visitors. As this results reveal the majority of the CMT location visitors are locals and day-trippers with substantial provincial differences which align to the Western Cape's position as the key foreign tourist destination in South Africa. More respondents were overnight visitors in the Western Cape followed by the Eastern Cape and KwaZulu-Natal while there were more local visitors in KwaZulu-Natal and the Eastern Cape compared to the Western Cape. The higher proportion of local residents and day-trippers could be as a result of the warmer waters and temperatures in the

Eastern Cape and KwaZulu-Natal which result in beaches in these locations being frequented more regularly by local residents and day-trippers for leisure and recreational purposes.

5.2.2. Spending patterns among CMT visitors in the Eastern Cape, KwaZulu-Natal and Western Cape

The average immediate group size of persons spending money together was 3, with responses indicating that CMT visitation is associated with a social dimension with persons being accompanied by immediate family members and/ or friends. Smaller immediate group sizes (and more persons travelling alone) were noted in the Western Cape which is associated with the province having more foreign visitors and KwaZulu-Natal having more locals and day-trippers.

In relation to spend categories, almost all respondents spent some money during their visit to the CMT location indicating the economic value of CMT activities and destinations to the local economy. In line with global trends, almost all visitors interviewed spent money on food. Other main categories of spend for all visitors were transportation within coastal/ marine location, payment for CMT products/ activities and CMT activity merchandize. Spent categories specific to tourists that were most prominent were transportation during visit (including airfares and travel within South Africa only), followed by accommodation at the CMT location and accommodation outside the CMT location. The reasons for preferring to stay outside the CMT location were not examined in the survey but is an important area for future research. Provincial differences were again noted which was related to the Western Cape having a higher proportion of foreign tourists.

5.2.3. Types of CMT products/ activities being consumed and future interest

CMT location visitors participated in a range of CMT activities. However, the main activities that respondents participated in or planned to participate in were sand/ beach recreational activities with the highest participation rates being in KwaZulu-Natal followed by the Eastern Cape and the lowest participation rate in the Western Cape which could again be attributed to weather and beach conditions at specific CMT locations. The prominence of sand/ beach recreational activities resonates with global trends (3S – sun, sea and sand) that these are the main CMT attractions.

Participation in pure recreational activities was also widely prevalent with the Eastern Cape having the highest participation rate followed by KwaZulu-Natal. Other coastal tourism activities were sightseeing (most prominent in the Western Cape), coastal heritage activities (most prominent in the Western Cape), educational and scientific excursions, as well as spiritual experiences.

Marine tourism activities had substantially lower participation rates compared to coastal tourism activities. The most prominent marine tourism activity was water sports followed by recreational fishing and wildlife tourism, which need further attention in future research since these activities have the largest impacts in relation to causing disturbances to animals as well as ecosystem damage and therefore needs to be properly managed and regulated. Other marine tourism activities were ocean experiences and snorkeling/ scuba diving. It is important to note that visitors often participate in multiple activities, including a combination of coastal tourism and marine tourism activities which reinforce the close interaction of coastal and marine environments.

In relation to future interest, for all CMT activities (with the exception of sand/ beach and pure recreational activities that the majority of the respondents participated in or planned to participate in on the day when the interview was) more visitors indicated that they would like to participate in the activities although provincial differences were noted. The lower interest in sand/ beach and pure recreational activities was most prominent in the Western Cape and could suggest that visitors in all provinces are interested in sand/ beach and pure recreational activities but would prefer to participate in these activities in other locations rather than in the Western Cape where beach conditions are not ideal as compared to the other provinces. Despite the provincial differences, the results indicate high levels of interest in CMT products/ activities in current levels of participation and future interest in CMT activities, especially coastal activities compared to marine tourism products/ activities, which reveal increased demand across all the provinces. The lower marine tourism rates and future interest can be as a result of these activities often being associated with additional costs.

This study also examined non-CMT activities that visitors participated in while visiting the CMT locations. The main activity identified that respondents participated in was adventure with substantial provincial differences (highest participation in the Western Cape followed by

KwaZulu-Natal and the Eastern Cape). The results show that CMT activities are closely associated with, and link to adventure tourism activities. Food and wine was the next most prominent activity that respondents participated in followed by shopping and social activities. Other activities identified were culture/ heritage, business, nightlife, natural attractions/ wildlife that were not coastal/ marine, visiting a casino, visiting theme parks, conferences, show performances and medical. Differences were noted among the provinces in relation to most of the non-CMT activities with the exception of food and wine, and visiting theme parks.

In relation to previous participation in CMT activities in South Africa, the findings indicate that most of the respondents across all the provinces stated that they previously participated in CMT activity/ activities in South Africa with lower responses in the Western Cape because of the higher proportion of foreign visitors. The results suggest that CMT locations have repeat visitors and attracts new visitors, again denoting demand at CMT locations. Repeat visitation is also most evident in KwaZulu-Natal and Eastern Cape where higher proportions of locals and day-trippers were noted. Repeat visitation reflects overall satisfaction with destination experiences and is indicative of a higher possibility of positive word-of-mouth marketing. High levels of satisfaction among the visitors interviewed were also evident with almost all the respondents in all the provinces stating that they would participate in CMT activities again in South Africa.

5.2.4. Main reasons for visiting specific CMT locations and visitor's perceptions of these destinations

The primary/ main reason for visiting a tourist destination is indicative of which specific products and activities attract visitors to a specific location. In this study, most of the respondents stated that the reason for visiting the CMT location where the interview was held was participation in CMT activity in the beach/ coastal location. This was followed by holidays. The responses indicate that the CMT location as a space for recreational and leisure activities and experiences play a key role in attracting persons to a specific CMT destination. Other main reasons identified by some of the respondents were visiting friends and relatives, shopping and other undisclosed reasons.

Respondents' were asked to rate their experience with various elements of the CMT location in relation to specific statements: 'well maintained location', 'parking is adequate', 'sufficient facilities and amenities', 'good refreshment areas/ food variety', 'this is a green location that encourages responsible environmental practices', 'signage to location was clear', 'safe location', 'entertainment opportunities available in the location' and 'location is too crowded'. The results reveal provincial differences with the Western Cape having the highest levels of satisfaction in relation to all statements, except crowding with the Western Cape having the highest level of dissatisfaction. KwaZulu-Natal reflects the least levels of satisfaction in relation to the rest of the statements. In terms of the specific statements, higher proportions of respondents expressed satisfaction with impressions of the maintenance of the location, refreshments/ food variety, signage and safety considerations. "Location is too crowded" was the only statement to have 50% of the respondents agree or strongly agree with the statement which was the lowest response for all the statements. Lower levels of satisfaction were generally linked to services and infrastructural provision which could suggest the need to better manage some of the CMT locations, especially in KwaZulu-Natal and the Eastern Cape where lower levels of satisfaction were noted. The responses do, however, normally reflect high satisfaction levels with the CMT experiences which suggest that CMT activities and destinations are largely positively perceived by users and visitors in South Africa.

5.3. Recommendations

Recommendations were noted in the previous chapter in relation to specific findings discussed. This section forwards additional recommendations or provides more detail in relation to recommendations identified in Chapter Four. Specifically, the focus is on recommendations in terms of research, methodological considerations and areas for future research. This study reveals that adopting a comparative approach is valuable and unpacks differences and similarities which are important to consider for provincial and national level planning and management of CMT in South Africa. However, future research should expand the comparative spatial examination to destination specific studies. For example, destinations that are known for or focus on specific types of CMT activities (such as whale viewing, shark diving, beach tourism, cruise tourism, snorkeling,

etc.) can be compared. Additionally, within the provinces specific CMT destinations can be compared to further unpack location-specific differences that go beyond provincial generalizations so that targeted strategies and interventions (including provision of infrastructure and services as well as conservation efforts) can be implemented.

Comparative research should also be undertaken temporally, that is, to examine changes over time. As Saayman (2017) argues, the beach tourism sector (and this is applicable to CMT more generally) is constantly changing in relation to visitor profiles, motives, preferences, activities desired and perceptions of destinations which are linked to major and rapid technological innovations that is shifting how destinations are marketed and how potential visitors receive and share information. Thus, future research should include tracer studies that examine shifts in CMT demands, motives, preferences and experiences.

While the Likert style question contributes to examining perceptions of CMT locations in South Africa, they do not establish the extent to which the aspects considered in this study influenced their decision to visit the location, influences their decisions generally when visiting CMT locations and will influence future decisions to visit CMT locations (including repeat visitation). This is an important area of research since caution needs to be exercised to make the assumptions that negative attitudes and/ or experiences translate to negative perceptions about the destination and therefore an unwillingness to visit. For example, Snider et al. (2015) found in their study in North Carolina that parking played on a minor role in influencing beach visitation. Furthermore, statements tend to cover different aspects that need to be further unpacked to understand perceptions and impacts. For example, the statements used in this study attempted to include various components including overall satisfaction, indications of environmental quality as well as facilities and infrastructure at the destination. Yet, the statements cover specific (and limited) aspects that may not be sufficiently comprehensive. For example, parking is one aspect of transport infrastructure and facilities at the destination and crowding does not unpack issues relating to environmental degradation (such a trampling of natural flora) which is highlighted as an important sustainability consideration in the literature.

As indicated in the previous chapter, in South Africa it is important to track transformational changes in terms of visitor profiles including aspects such as racial/ ethnic profiles and gender. It was noted that while a question regarding racial categories was included in the surveys for South African visitors, the results were problematic since respondents and fieldworkers confused racial categories and nationality. Thus, the lessons for future research that include racial/ ethnic backgrounds is that questions need to be clear and specific, differentiating nationality from racial/ ethnic groups. Additionally, fieldworkers and field supervisors need to be trained to understand these questions and check that they are properly completed.

This study reveals the importance of examining future interest in CMT products/ activities which can be used to deduce demand and likely impacts. It can also assist tourism public and private sector entities to respond to these demands in the development of CMT products as well as in relation the provision of services and infrastructure at specific destinations. However, to better examine future interest it is imperative that research also covers issues pertaining to willingness to pay for these products and maintaining CMT sites as highlighted by Dicken and Hosking (2009), Penn et al. (2016) and Rodella et al. (2019). Willingness to pay (and the amount that visitors can afford) will assist in establishing whether the desire or interest to participate in a CMT activity, especially marine activities that require payment, can be translated into practice among visitors when the opportunity arises.

The higher levels of future interest in relation to current participation is indicative of increased demand for CMT as noted by Joseph (2017), Leijzer and Denman (2014), Liu et al. (2019), Marafa and Chau (2016), Oh et al. (2010) and Saayman (2017). This is likely to result in increased pressure on the CMT natural base if demand and consumption exceeds the carrying capacity of CMT locations as articulated by Chen and Teng (2016) and Corbau et al. (2019) which needs to be managed.

It is imperative that municipalities and agencies responsible for the management of CMT sites under their jurisdiction consider CMT visitor profiles and demand. A better understanding of visitor profiles ensures more targeted and effective marketing. Understanding visitor demands need to consider infrastructural needs and the sensitivity of the ecosystems which may require

some locations being managed as marine protected areas and/ or restrictions in relation to the number of visitors that can be accommodated and/ or restrictions in relation to CMT activities such as fishing. CMT locations are vulnerable and sensitive ecosystems that need to be carefully managed and regulated, if need be. CMT activities (especially marine and other extractive activities) can cause considerable damage and disturbances than can undermine the integrity of these environments. This can lead to unsustainable practices that can eventually threaten the value of these areas, including the ecosystem services they provide. The sustainable management of CMT locations needs to be a key priority nationally, provincially and at specific destinations (especially those that are environmentally vulnerable and sensitive). This is particularly important in the context of the increasing demand for CMT activities and experiences as this study reveals.

5.4. Concluding remarks

CMT in South Africa undoubtedly contributes substantially to economic development as well as providing leisure and recreational opportunities to different types of visitors. It also assists in the conservation and preservation of coastal and marine environments, especially in marine protected areas. However, with increased demand (from CMT as well as other interests), the need to ensure that practices and behaviors are responsible and sustainable are particularly important given that CMT locations are generally environmentally vulnerable and sensitive areas. To achieve NDT (2016) and Operation Phakisa's (2014) aspirations to unlock the potential of the blue economy, including CMT, in South Africa to contribute more to GDP and job creation; it is important to better understand CMT in relation to visitor profiles and perceptions. This study contributes to sustainable and responsible tourism and the use of the natural resource base (especially for sectors such as CMT which rely on coastal and marine environments as the key attractions) since a better understanding of the profile and perceptions of CMT location visitors ensures more effective planning to protect and conserve these areas as well as improve marketing strategies and sustainable CMT growth.

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APPENDIX 1
CMT VISITOR SURVEY

UNIVERSITY OF KWAZULU-NATAL
INYUVESI YAKWAZULU-NATALI

CLIENTS/ CUSTOMERS/ USERS/ TOURISTS

Date of interview: _____ Place of interview: _____

We are conducting a survey to assist us to better understand the economic impacts of Coastal and Marine Tourism in South Africa. This is a National Department of Tourism (NDT) funded project that is being undertaken by the University of KwaZulu-Natal. Please note that all answers will be kept confidential and presented anonymously to the NDT and in academic publications.

Thank you for your participation!

SCREENING QUESTION

1. Have you participated or will you participate in any coastal and marine tourism activity at this location today?

Yes	No

IF NO, KEEP A RECORD OF THE NUMBER OF THESE PERSONS ENCOUNTERED DURING THE FIELDWORK PERIOD AND DO NOT CONTINUE WITH THE INTERVIEW. IF YES, CONTINUE WITH THE SURVEY.

A. PROFILE OF RESPONDENTS

1. Are you an overnight visitor from out of town, a day visitor from out of town, or a local resident?

Overnight visitor from out of town	Day visitor from out of town	Local resident (from within town/ city municipality)

1.1. If you are a tourist (overnight out of town visitor) or day visitor, where are you from?

Outside South Africa	Country:								
South Africa	Eastern Cape	Free State	Gauteng	KwaZulu-Natal	Limpopo	Mpumalanga	Northern Cape	North West	Western Cape

2. How many persons are accompanying you who you are paying for or spending money together as a group (that is, your immediate group size) who are also participating in the coastal and marine tourism activity?

1	2	3	4	5	>5 (specify)

3. What types of coastal and marine tourism activities have or will you be participating in during this visit to this beach location (including activities participated in today)? What other types of coastal and marine tourism activities are you, in the future, interested in participating in? (Mark all that apply)

	THIS VISIT		FUTURE
	Did	Will do	Future interest
Wildlife tourism (e.g. whale watching, turtle tours, seals, dolphins)			
Recreational fishing (e.g. boat-based fishing, spear fishing, fishing competitions)			
Scuba diving/ snorkeling (e.g. shark cage diving)			
Water sports (e.g. big wave surfing, kite surfing, stand up paddle boarding (SUP), yachting, water skiing, water surfing)			
Ocean experience (e.g. cruise tourism, marinas, island tourism, shipwreck diving)			
Events (e.g. marine festivals and marine competitions such as yacht races or regattas, fishing competitions)			
Sand/ beach recreational activities (e.g. swimming, walking or running, kite-flying, beach combing, sand dune surfing)			
Coastal heritage activities (e.g. local seafood and cultural tourism, cultural history)			
Sightseeing (e.g. light house tourism, cycling, marathons)			
Educational and scientific excursions (e.g. aquariums)			
Spiritual experiences			
Pure recreational (e.g. dining out, shopping)			
Other (specify)			

4. What are/were the main activities you intend participating in/have participated in during your visit to this location other than coastal and marine activities? (Mark all that apply)

Shopping	Business	Adventure	Medical/ health	Nightlife	Sport	Visited a casino
Business	Social (VFR)	Food and wine	Theme Parks	Cultural/ heritage	Conference	Shows/ performances
Visiting natural attractions/ wildlife that were not coastal/ marine			Other (specify)			

5. How many times previously have you participated in this/ these type/s of coastal and marine tourism activity/ activities in South Africa?

None	1	2	3	4	5	>5 (specify)

6. Would you participate in this/ these types of coastal and marine tourism activity/ activities again in South Africa?

Yes	No (provide a reason)

7. Would you advise friends, relatives or colleagues to participate in this/ these type/s of coastal and marine tourism activity/ activities again in South Africa?

Yes, definitely	Possibly	No, definitely not

B. CONSUMER EXPENDITURE BEHAVIOR

1. Approximately how much money did or will you spend (inclusive of the immediate group you are spending money for) in relation to participating in coastal and marine tourism activities during this visit at this coastal/ marine location? (ALL including locals except for accommodation) *(Please write: "0" if no expenditure or "x" = I cannot recall)*.

Item	**Amount in Rands**		**None (O) or Cannot recall (X)**
	Did	**Will**	
Payment for coastal and marine tourism products/ activities (e.g. whale watching, shark diving, turtle tours, boat-based fishing)			
Food and drinks			
Coastal and marine tourism activity merchandize			
Shopping			
Transportation within coastal/ marine location			
Transportation during visit, including airfares and travel within South Africa only (**for tourists only**)			
Accommodation at coastal/ marine locations only (**for tourists only**)			
Accommodation outside coastal/ marine locations (**for tourists only**)			
Other (e.g. entertainment, visits to attractions)			
OVERALL TOTAL ESTIMATE (MOST IMPORTANT FIGURE TO OBTAIN)			

2. What was your primary/main reason for visiting this location where the coastal or marine activity you are participating in is taking place?

Participation in coastal and marine tourism activity in this beach/ coastal location	Holiday	Business	Visiting friends and relatives (VFR)	Shopping	Other (specify)

3. If an overnight visitor from out of town/ city, how many nights did/will you spend during your visit to this coastal town/ city (specify name of town where interview is being conducted) in paid accommodation (excludes VFR)?

None	1	2	3	4	5	Other (specify)

3.1. If you are an overnight visitor, how many nights will you be spending during this visit outside this town/ city but within South Africa?

1	2	3	4	5	>5 (specify)

4. How did you travel from your place of residence/ accommodation to this location today? Multiple responses permitted.

Private vehicle	Rental vehicle	Metered taxi (e.g. Uber)	Minibus taxi	Bus	Walked	Other (specify)

5. Please indicate the level of agreement with the following statements about this coastal/ marine location (not town/ city as a whole) (select one option for each variable).

KEY: 1 - strongly disagree 2 - disagree 3 - neutral 4 - agree 5 - strongly agree

STATEMENT	1	2	3	4	5
Well maintained location					
Parking is adequate					
Sufficient facilities and amenities (e.g. toilets)					
Good refreshment areas/ food variety					
This is a green location that encourages responsible environmental practices (e.g. recycling)					
Signage to location was clear					
Safe location					
Entertainment opportunities available in the location					
Location is too crowded					

D. DEMOGRAPHIC PROFILE

1. What is your age or can you provide with an age range? _____ years

18-20	21-30	31–40	41-50	51-60	61-70	70+ (specify)

2. Highest level of education completed.

No formal education	Primary completed (7 years of schooling)	Partial secondary completed (8-11 years of schooling)	Matric/ secondary completed	Certificate/ diploma
Undergraduate degree	Postgraduate degree	Other (specify)		

3. What is your monthly net income (after deduction of taxes) or can you provide us with a monthly income range? _____

None	R 1 – R 8000	R 8001 – R 10 000	R 10 001 – R 20 000	R 20 001 – R 30 000	R 30 001 – R 40 000	R 40 001 – R 50 000	>R 50 000 (specify)	Confidential

4. INTERVIEWER TO NOTE

Gender of respondent		Historical racial category (South Africans only)					
Male	Female	African	White	Colored	Indian	Don't know	Other (specify)

THANK YOU FOR YOUR PARTICIPATION! For queries contact:
Prof Urmilla Bob (UKZN)
bobu@ukzn.ac.za or 031 260 2501

APPENDIX 2
ETHICS APPROVAL LETTER

UNIVERSITY OF KWAZULU-NATAL
INYUVESI YAKWAZULU-NATALI

20 September 2018

Professor Urmilla Bob 7234
Reserach Office
Westville Campus

Dear Professor Bob

Protocol reference number: HSS/1596/018
Project Title: Development framework to assess the economic impacts of coastal and marine tourism

Full Approval – Expedited Application

In response to your application received 6 September 2018, the Humanities & Social Sciences Research Ethics Committee has considered the abovementioned application and the protocol has been granted **FULL APPROVAL.**

Any alteration/s to the approved research protocol i.e. Questionnaire/Interview Schedule, Informed Consent Form, Title of the Project, Location of the Study, Research Approach and Methods must be reviewed and approved through the amendment /modification prior to its implementation. In case you have further queries, please quote the above reference number.

PLEASE NOTE: Research data should be securely stored in the discipline/department for a period of 5 years.

The ethical clearance certificate is only valid for a period of 3 years from the date of issue. Thereafter Recertification must be applied for on an annual basis.

I take this opportunity of wishing you everything of the best with your study.

Yours faithfully

.....
Professor Shenuka Singh (Chair)
Humanities & Social Sciences Research Ethics Committe

/pm

cc Supervisor/Project Leader: Professor Bob
cc School Administrator: Ms Marsha Manjoo

Humanities & Social Sciences Research Ethics Committee
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