Visitor Profiles of Coastal and Marine Tourism Sites in the Eastern Cape, South Africa

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Abstract

Current research on Coastal and Marine Tourism (CTM) in South Africa focuses on two main coastal tourism provinces (KwaZulu-Natal and Western Cape) as well as specific CMT activities such as whale watching and shark cage diving. This study, therefore, contributes to the body of knowledge on CMT by focusing on the Eastern Cape and undertaking a provincial level analysis. Coastal and Marine Tourism location visitor profiles in terms of socio-economic profile, types of CMT visitors, types of CMT activities participated and future interest in the Eastern Cape, South Africa. CMT encompasses activities and resources in and near coastal and marine areas that attract visitors who participate in a range of active and passive business, adventure, leisure and recreational activities that generate socio-economic and environmental benefits. A quantitative approach is adopted, drawing on 700 visitor surveys that were conducted at purposively selected CMT locations in the Eastern Cape. Visitors were from a range of socio-economic backgrounds. There were high levels of participation in CMT activities, especially coastal leisure and recreational activities. Results indicate increased CMT location visitation demand. From a sustainability and responsible tourism perspective, understanding who visits CMT sites assists in ensuring effective planning to manage demand and protect/ conserve coastal and marine resources.

Keywords: Coastal and marine tourism (CMT), visitor profiles, Eastern Cape, South Africa

Introduction

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 concomitant impacts, especially in the context of reliance on sensitive natural resources (Biggs, Hicks, Cinner & Hall, 2015; Bob, Swart, Ngalawa & Nzimande, 2018; Dodd & Holmes, 2019; Papageorgiou, 2016; 2019). Recreational activities such as visiting beaches, surfing, swimming and fishing in coastal areas are key tourism pursuits in coastal locations. Biggs et al. (2015) assert that coastal and marine-orientated nature-based tourism plays an important socio-economic role and

provides an incentive for conservation in many coastal regions. While there is increasing research in the field of tourism (including CMT), there is limited research that examines visitor profiles in different contexts. 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 many tourists from all around the world. Hung and Petrick (2011) argue that for South Africa to capitalise on its CMT assets, it is necessary to understand the markets that use them, the reasons why people travel and what visitors would like to gain from their trips. This is reiterated by Carvache-Franco et al. (2019) and Jarvis et al. (2016) who indicate that numerous studies conclude that expenditure is affected by the overall satisfaction with a destination, leading to multiple visits and positive word-of-mouth marketing.

There is a growing body of research on CMT in South Africa, most studies focus on specific locations in two coastal provinces, namely KwaZulu-Natal and the Western Cape or specific CMT activities such as whale watching and shark cage diving (Giddy, 2016; McKay, 2017; 2020). This study focuses on visitors to specific CMT sites in the Eastern Cape, including overnight tourists, day-trippers and locals who participate in CMT activities. The inclusion of all visitor groups is based on the premise that consumption of, and participation in, CMT activities of all group types impact on coastal and marine resources, which needs to be managed and better understood for more effective marketing and sustainable CMT. As this study focuses on the Eastern Cape it contributes to the body of knowledge on CMT. Specifically, this study presents the socio-economic profiles of visitors to CMT locations; identifies the types of CMT visitors in relation to overnight tourists, day-trippers and locals; and assesses the types of CMT products/ activities consumed in the Eastern Cape.

Cañavate, Conesa, Penalver and Anunciacao (2019) state that oceans, seas and coasts are key engines of wealth generation, 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. They link 'blue tourism' to 'blue economic growth'. 'Blue tourism' includes tourism carried out on the coast or at sea which can incorporate, in relation to the quality of the service offered, the economic, social and environmental aspects of sustainability to minimise negative impacts on the natural ecosystem and the local economy. There is a growing recognition of CMT and its importance in South Africa, as articulated in the Phakisa Oceans Economy framework. Operation Phakisa focuses on unlocking the economic potential of South Africa's oceans and stimulating the country's 'blue economy', noting that South Africa's oceans can generate billions of Rands to the Gross Domestic Product (GDP) by the year 2033 (Operation Phakisa, 2014). Operation Phakisa (2014) identifies the Eastern Cape, KwaZulu-Natal and the Western Cape provinces as the main drivers of this initiative. However, limited research exists in relation to understanding visitor profiles of persons frequenting CMT locations. There is also limited research on CMT demand, which this study also focuses on. Examining social aspects, including perception studies and visitor profiles, contribute to the body of knowledge on CMT and visitor monitoring studies.

The next section undertakes an overview of pertinent literature in relation to CMT, focusing on the South African context and visitor profile research. This is followed by a discussion of the background to the case study (the Eastern Cape CMT locations were visitor interviews we conducted) and the methodological approach adopted. Thereafter, the data is analysed thematically in relation to the socio-demographic profile of the respondents, visitor profiles and types of CMT products/ activities consumed/ participated in. Finally, concluding remarks and recommendations are presented.

Literature review
Overview of CMT

Lenzen, Sun, Faturay, Ting, Geschke and Malik (2018) state that tourism contributes significantly to global GDP and is forecast to grow at an annual rate of four percent, thus outpacing many other economic sectors. Notwithstanding the COVID-19 global disruptions that have led to severe impacts on all economic sectors (Niewiadomski, 2020; Sigala, 2020), the tourism sector is likely to resume its growth trends post the pandemic based on Cheng and Zhang's (2020) assertions that tourism is a particularly resilient sector and that growth is likely to resume once the pandemic is brought under control.

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 is the main asset which provides a destination's advantage. The United Nations Environment Programme (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". Papageorgiou (2016: 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".

A key issue is what constitutes coastal and marine areas. Papageorgiou (2019) asserts that coastal areas are transitional areas between the hinterland and the sea. Yustika and Goni (2019) indicate that 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. Barbier (2017) notes 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) further 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.

Comparable distinctions are made by Papageorgiou (2016) who asserts coastal tourism relates to sun and beach activities such as sunbathing, swimming and driving coastal routes. Papageorgiou (2016) indicates that marine tourism is dominated by cruises as well as other water sport activities such as scuba diving, sailing, underwater and sport fishing, windsurfing, surfing, tours to marine parks and observation of wildlife and observation of marine mammals. Tegar and Gurning (2018) state that marine tourism constitutes a form of tourism that is connected to and dependent on the sea and the marine environment. They include activities taking place in the deep oceans such as cruising and sailing as well as water-based leisure 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. Furthermore, Tegar and Gurning (2018) highlight that in relation to marine tourism, much of the supporting facilities and infrastructure are usually found on land.

Several studies focus on visitor profiles. For example, Tkaczynski and Rundle-Thiele (2019) examine the importance of understanding who has the highest return on investment, and who yields the highest dividends, by assessing Norwegian whale watching tourist differences using segmentation. Carvache-Franco, Carvache-Franco, Carvache-Franco and Hernandez-Lara's (2019) study in Ecuador, focuses on foreign tourists, illustrating how demand segmentation at coastal destinations contributes to the commercialisation of locations aimed at specific groups. Martinis, Kabassi, Karris and Minotou (2019) examine 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 understand the perceptions of tourists, crucial for the compilation of strategic plans, as well as for the implementation of an adapted environmental policy.

Tegar and Gurning (2018) assert that key aspects visitors consider in relation to a destination are attractions (which often provides the initial motivations to travel to a specific destination) which include natural components, activities, buildings and culture; amenities (support services, transportation, accommodation, restaurants, recreational facilities, visitor information, tourist guides and operators), accessibility (how easy is it to reach a destination), human resources, image (a destination's uniqueness, environmental quality, scenery, safety, friendliness, service level) and price (relates to affordability and includes costs for transportation, accommodation, food, other services, attractions and tours). 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 although both older and younger visitors are more likely to return.
- Gender: males are more likely to return, 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, Stoeckl and Liu (2016) identified that affect repeat visitation and visitor satisfaction are: 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, satisfaction with the beach/ location and overall experience satisfaction.

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". The NDT (2016) notes aspirations in South Africa to reach the goals of the coastal and marine sector contributing R43.3 billion to the GDP and double employment numbers by 2030. 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 nine percent 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. Goliath, Mxunyelwa and Timla (2018) also note that coastal tourism has been identified by the South African context, 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.

In terms of visitor profile research in South Africa, Scholtz, Kruger and Saayman (2015) used destination-based surveys based on self-administered questionnaires during 2012 and 2013 (496 completed questionnaires were used in total) at three of South Africa's coastal national parks (the Addo Elephant, Tsitsikamma, and Wilderness National Parks). Their study indicate that visitors were mostly homogenous in terms of their demographic characteristics, but differed in relation to behavioural characteristics such as length of stay. Kruger et al. (2018) examine whale watching in South Africa, developing an experience-based typology of visitors to a South African whale-watching festival, namely 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. 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 activities to similar natural events generally. Kruger et al.'s (2018) study also used a visitor survey to collect information on the socio-demographic profile of the whale festival attendees, motivational factors and their experiences at the festival.

Dicken and Hosking (2009) undertook research within the Aliwal Shoal Marine Protected Area on South Africa's east coast, in KwaZulu-Natal, to assess the socio-economic impacts of the tiger shark diving industry. They interviewed 197 divers. They found the majority were overseas visitors to South Africa hailing from 19 countries. Furthermore, their results reveal that almost all the divers were white and male, with an average of 39 years old. Additionally, concerning the income status, Dicken and Hosking (2009) indicate that more than a third of the respondents were professionals. The average number of days that 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. They determined visitor profiles at six beaches in the Margate area in KwaZulu-Natal. The profile of beach visitors showed that the majority were married females. Additionally, most respondents were from Gauteng (KwaZulu-Natal's main domestic tourism market) with post-matric qualifications. Overnight visitors on average stayed for 8 nights and travelled in groups of four to six people. Furthermore, they visit the area between one and three times a year.

Lucrezi, Saayman and van der Merwe (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 have a Mediterranean climate and they were urban) and differences (for example, some beaches were exposed and others were embayed, some were located in marine protected areas and others not). Their study revealed that the participants were mostly female, employed or students, between 27 to 40 years old, well-educated with post-matric qualifications, and mostly single or married. The average income was R260 000 (US$23 700) per year. The beachgoers were generally South Africans from the Western Cape, except for Clifton beaches (key tourist destination in Cape Town) were the beachgoers were mainly foreign. The beaches in Cape Town were mainly frequented by overnight and day visitors from out of town. Local residents visited beaches further away from the city centre. Surveyed participants either stayed in their own accommodation or in a rented house. Lucrezi, Geldenhuys, van der Merwe and Saayman (2018) indicate the usefulness of visitor data to assist in the management of recreational sandy beaches in South Africa. The research was undertaken in South Africa at twelve recreational sandy beaches with different urbanisation levels. The study reveal that there is variability in the profile and perceptions of beachgoers according to urbanisation and geographic location of the beaches.

Eagleton and du Plessis (2019) note that a key aspect to consider is why specific beachgoers choose specific destinations. Saayman (2017) indicates that beachgoers increasingly consider recreational activities (such as bike riding, surfing and fishing) as well as facilities and services present at specific beach locations when making decisions regarding

which beaches to visit. In response to these demands, Saayman (2017) states that the beach tourism sector is changing in terms of motives of visitors, their profiles and activities they participate in. Thus, as Biggs et al. (2015) indicate, tourist experiences are a central component of the sustainability of tourism enterprises which contribute to a destination's attractiveness.

Rodella, Madua, Mazzanti, Corbau, Carboni, Utizi and Simeoni (2019) indicate that since coastal tourism induces environmental impacts and pressure on the natural resource base, understanding demand and visitor profiles has become critical. Eagleton and du Plessis (2019) state that understanding the visitor profiles and travel motives of beachgoers will contribute to beach destinations in South Africa by developing effective marine tourism planning strategies through cost-effective marketing and management. As Oh, Draper and Dixon (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 minimise disruptions and ensure positive experiences.

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, Moodley and Sookrajh (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.

Overview of the Eastern Cape

Continental South Africa has a coastline of approximately 3 650 km and an Exclusive Economic Zone (EEZ) of over one million km^2 (Griffiths, Robinson, Lange & Mead, 2010). These authors further indicate that South Africa has a recorded marine biota of at least 12 914, making it one of the most biodiverse marine 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 Eastern Cape, which is the focus of this provincial level case study, 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 CMT locations along the Eastern Cape's shoreline are Jeffreys Bay, Port Elizabeth, Port Alfred, East London and Port St Johns, which is where the visitor interviews were mainly conducted.

Methodology

The focus for this study was CMT locations along the coastline, although the surveys included questions on the participation among visitors on the range of CMT activities as indicated in Table 1. The CMT lab in South Africa, a collaboration with the National Department of Tourism (NDT) and the Department of Environmental Affairs (DEA), distinguishes between marine tourism and coastal tourism activities.

Table 1: Marine tourism and coastal tourism activities (Source: NDT, 2016)

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

The methodological approach adopted is a quantitative approach, drawing on visitor surveys that were conducted as part of a larger NDT study that was undertaken by the University of KwaZulu-Natal to develop a framework to assess the economic impact of CMT in the country. Face-to-face interviews were conducted with 700 visitors at purposively selected CMT locations in the Eastern Cape. Figure 1 indicates the specific areas in the Eastern Cape where interviews were conducted.
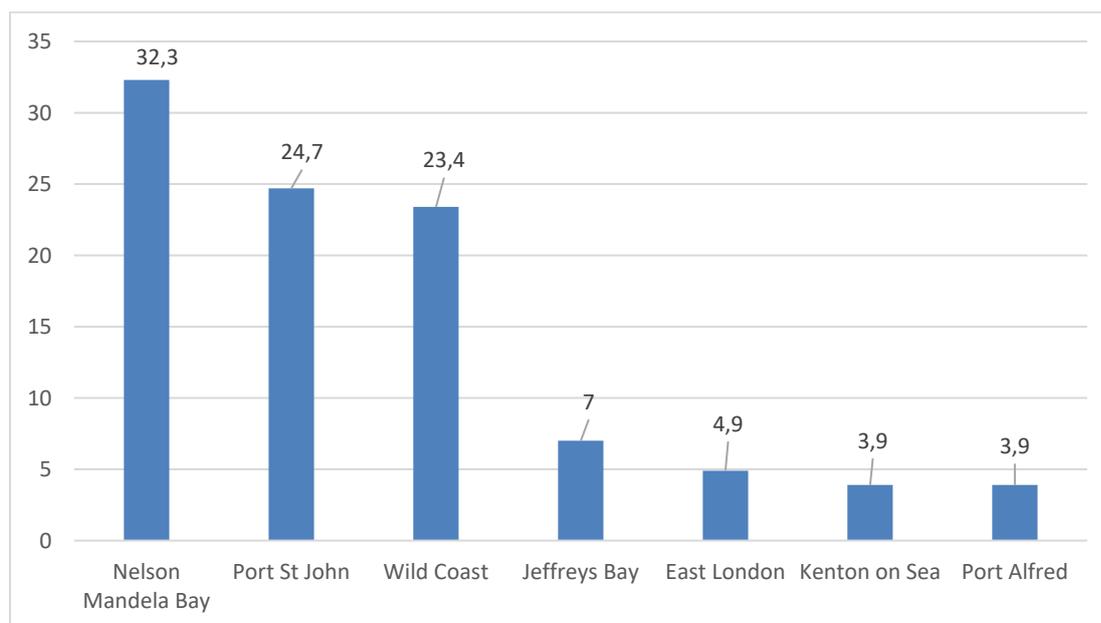

Figure 1: Area (town/ city) where interviews were conducted (n=700, in %) (Source: authors)

Most interviews were conducted in Nelson Mandela Bay/ Port Elizabeth (32.3%) followed by Port St Johns (24.7%) and the Wild Coast (23.4%). Fewer interviews were conducted in Jeffreys Bay (7%), East London (4.9%), Kenton on the Sea (3.9%) and Port Alfred (3.9%). The differences are aligned to the proportionate, purposive sampling approach where more surveys were completed in locations that attract more visitors. A limitation of the study is that not all CMT locations were included in the study. At the selected location, spatially-based systematic sampling was used to select adult visitors to be interviewed. Fieldworkers involved in the research were placed at specific locations and were trained to complete the surveys on specific days. On a given day, the first interviewee was purposively selected. Thereafter, adult persons (over 18 years of age to comply with ethical requirements) were selected systematically, that is, on completion of a survey the 20th adult person passing

by was approached to take part in the study. Respondents were asked to confirm that they were over 18 years old prior to the interview being conducted. The systematic sampling approach was used to reduce bias since the population was not known and constantly changing, thus random sampling was not an option. This is generally a methodological limitation in relation to undertaking research in open spaces.

Only persons visiting the location to participate in, or those who had participated in, CMT activities were interviewed. Ethical approval for the study was obtained from the University of KwaZulu-Natal's Human and Social Sciences Ethics Committee. The data analysis was undertaken thematically. Data was inputted into the Statistical Package for the Social Sciences. In addition to descriptive statistics (the generation of percentages), inferential statistics were used to establish whether there are significant relations between selected variables to permit cross comparisons. Chi-square tests (from cross-tabulations) were used, with p values less than 0.05 indicating a statistically significant relationship. Chi-square tests compare the means of the variables. The percentages are rounded off to whole numbers, except when the results were less than one percent. As a result of the rounding off, in some instances percentages do not add up to 100% for single response questions.

Results
Demographic profile of visitors
The key demographic variables examined in the literature are age, gender and nationality. The age categories of the respondents are presented in Table 2.

Table 2: Age category of respondents (n=700) (Source: authors).

	Percentage
N/A	0.1
18-20	10
21-30	32
31-40	36
41-50	14
51-60	7
61-70	1
>70	0.1

The average age of the respondents was 34 years and ranged from 19 to 75 years old. Most respondents were in the age categories of 21-30 years old (32%), 31-40 years old (36%) and 41-50 years old (14%). The results reveal that younger and middle-aged groups dominant. The results were dissimilar to Dodd and Holmes' (2019) study which found that visitors were evenly distributed from all age categories, but in line with Kruger et al.'s (2018) research that also revealed an average age of 34 years. In terms of the gender, equal proportions of respondents were males and females (50% each). 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. 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's (2009) research.

Most of the respondents were South Africans (87%) and the rest were foreign visitors (13%). In terms of foreign visitors, country responses were categorised into continents. Most foreign visitors were from Europe (7%), one of South Africa's key tourist markets. Fewer foreign visitors were from other continents. Specifically, 3% were from Africa and 2% were from North America. One percent of the respondents were from Australia and New Zealand

and less than one percent were from Asia (0.4%) and South America (0.1%). The results reflect the national trends with the exception of visitors from other countries in Africa which is viewed as a key tourism source market for South Africa. The findings may reflect Ahmed et al.'s (2008) assertion that African tourists are generally from neighbouring African countries and their main reason for visiting South Africa is shopping or business. Table 3 illustrates the provinces where South African respondents were from.

Table 3: Province where respondents are from (n=700) (Source: authors)

	Percentage
Not applicable (foreigners)	13
Eastern Cape	49
KwaZulu-Natal	15
Gauteng	12
Western Cape	4
Limpopo	3
Mpumalanga	3
Free State	2
North West	.7

Close to half of the respondents (49%) of the respondents were from the Eastern Cape (with 30% being locals) and 15% from KwaZulu-Natal and 4% from the Western Cape. 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%). Two percent of the respondents were from the Free State and 3% each from Limpopo and Mpumalanga. Very few respondents were from the North West province (0.7%).

Socio-economic indicators

As highlighted in the previous section, examining the socio-economic profiles of visitors are important to understand CMT demand as well as inform effective destination management and marketing strategies (Oh et al., 2010). Additionally, socio-economic variables assist in assessing who chooses CMT destinations and how various factors influence the decisions they make. The highest level of education attained among the respondents are presented in Table 4.

Table 4: Highest level of education completed by respondents (n-700) (Source: authors).

	Percentage
No formal education	1
Primary completed (7 years of schooling)	0.1
Partial/ secondary completed (8-11 years of schooling)	4
Matric/ secondary completed	27
Certificate/ diploma	26
Undergraduate degree	28
Postgraduate degree	13

Almost all the respondents had matric or post-matric qualifications (94%), although noticeable differences are discernible in relation to the qualifications obtained. Specifically, 27% of the respondents had completed matric/ secondary schooling, 26% had certificates/ diplomas, 28% had undergraduate degrees and 13% had postgraduate degrees. Four percent of the respondents stated partial/ secondary completed, 1% indicated no formal education and one respondent specified primary completed. This is in line with the profiles of tourists who travel who tend to be more educated (Dodd & Holmes, 2019; Jarvis et al., 2016; Kruger et al., 2018; Lucrezi et

al., 2016). This indicates that persons who travel have a different profile than the general population in South Africa. It is important to note that CMT as an activity itself tends to have educational benefits, as indicated by Barbier (2017). The overall average monthly income of the respondents was calculated to be R19 703 (ranging from none to R235 000). The average monthly income categories are indicated in Figure 2.
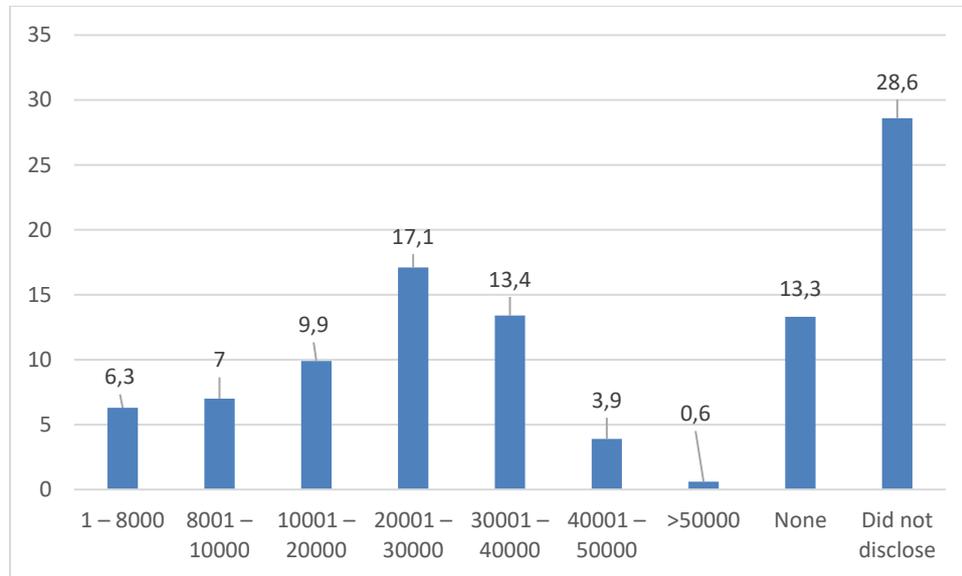

Figure 2: Monthly net income (in Rands) categories of respondents (n=700, in %) (Source: authors)

A substantial proportion of respondents (28.6%) did not disclose their income. This is a challenge when undertaking visitor surveys since some people regard income as confidential information. Thirteen percent of the respondents stated none. Among those who provided a response, most indicated R10 001 to R20 000 (9.9%), R20 001 to R30 000 (17.1%) and R30 001 to R40 000 (13.4%) – making up 40.4% of the respondents. In total, 13.3% of the respondents indicated R10 000 or less and 4.5% stated more than R40 000. As indicated by Jarvis et al. (2016), income influences visitor experience at destinations, including preferences for and the extent of participation in activities.

Visitor profile of respondents
In this study, slightly more than half of the respondents (51%) were overnight visitors and the rest were locals (29%) and day visitors from out of town (20%). The higher proportion of respondents who were overnight visitors reveal the importance of CMT locations as tourist destinations. The results are dissimilar to Ahmed et al.'s (2008) study. They found that mainly locals and day-trippers in KwaZulu-Natal were dominant visitors at beach locations. The results are, however, similar to Lucrezi et al. (2016) who underscored the prevalence of day-trippers and overnight visitors at beach and other coastal tourism locations in Cape Town.

The results reveal that Eastern Cape CMT locations attract overnight tourists, day-trippers and locals. This supports the literature that indicates that CMT locations attract multiple users and stakeholders of which tourists and recreational visitors are the main ones (Lucrezi et al., 2018; Oh et al., 2010). The different user groups also align to Carvache-Franco et al. (2019), Kruger et al. (2018) and Tkaczynski and Rundle-Thiele's (2018) contention that market segmentation is noticeable at CMT locations, which also relates 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.

Differences in relation to the type of visitor and place were interviews were conducted were observed, which was reinforced with a chi-square test value of p=0.000. Specifically, proportionately more overnight visitors compared to day-trippers and locals were evident in Jeffreys Bay and the Wild Coast, which are key tourism locations. Additionally, most locals were interviewed in Nelson Mandela Bay, which is the largest city and the economic hub of the Eastern Cape. Day-trippers mainly visited Nelson Mandela Bay, Port St John and the Wild Coast. Additionally, chi-square tests were undertaken in relation to socio-demographic variables (age, gender, nationality, education level and income) and type of visitor and location where interview was held (Table 5). Statistically significant relationships have a p value of less than 0.05.

Table 5: Chi-square tests p values examining whether there is a relationship between socio-demographic variables, and type of visitor and location where interview was held (Source: authors)

	Visitor Profile	**Interview Location**
Age	*<0.001*	0.168
Gender	*0.008*	0.850
Nationality	*<0.001*	*<0.001*
Educational level attained	*<0.001*	*0.027*
Income	*<0.001*	0.123

*tests conducted at the 95% confidence interval.

In relation to the type of visitor, statistically significant relationships were found in relation to the socio-demographic variables. Some noteworthy differences are that in terms of age. More specifically, overnight visitors were mainly from the older age cohorts, (eg> 50yrs) which could be attributed to more discretionary income among this group. KwaZulu-Natal. For gender, more males than females were overnight visitors while more locals were females than males. Higher incomes and educational levels were noted among overnight visitors, followed by day-trippers and then locals. In terms of nationality, most day-trippers were from the Eastern Cape and KwaZulu-Natal (which is surprising considering KwaZulu-Natal's many CMT locations). Almost all the international visitors were in the overnight category. In terms of provinces, most overnight visitors where from the Eastern Cape and KwaZulu-Natal. It is reassuring and optimistic to note that a substantial proportion of CMT consumers are from the domestic sector, especially amidst projections of disastrous impacts due to COVID-19 restrictions and international travel bans. In terms of the socio-demographic variables and the location where the interview was held, statistically significant relationships were not found for age, gender and income.

Statistically significant relationships were found for nationality and educational level attained. Results show a disproportionate distribution of tourist profiles across the various CMT sites. Significantly, higher proportions of international and local tourists were interviewed at Nelson Mandela Bay, Port St John and the Wild Coast, suggesting that these sites are main attractions for both local and international markets. Locally, Port St Johns and the Wild Coast sites had higher proportions of domestic tourists from the Gauteng and KwaZulu-Natal

provinces. The characterisation of tourist profiles allows for improved tourist experiences through the provision of tailor-made offerings. This may also assist in materialising some of the goals listed in operation Phakisa in relation strategic expansion of the CMT sector in South Africa.

Participation in CMT activities and future interest

As indicated in the previous section, there are different types of marine tourism and coastal tourism activities which generally are interconnected. This study found respondents participated in multiple CMT activities during their visit to the beach/ coastal locations, and also intended to participate in a variety, see Table 6.

Table 6: CMT activities respondents did or would participate in during visit to CMT location when interview was held (in %): Multiple responses allowed (Source: authors).

	Percentage	
	Did	Would
Sand/beach recreational activities (for example, swimming, walking or running, kite-flying, beach combing, sand dune surfing)	79	17
Pure recreational (for example, dining out, shopping)	51	22
Sightseeing (for example, lighthouse tourism, cycling, marathons)	18	10
Coastal heritage activities (for example, local seafood and cultural tourism, cultural history)	13	9
Wildlife tourism (for example, whale watching, turtle tours, seals, dolphins)	9	8
Water sports (for example, big wave surfing, kite surfing, stand up paddle boarding, yachting, water skiing, water surfing)	9	7
Events (for example, marine festivals and marine competitions such as yacht races or regattas, fishing competitions)	9	7
Educational and scientific excursions (for example, aquariums)	8	7
Ocean experiences (for example, cruise tourism, marinas, island tourism, shipwreck diving)	7	7
Recreational fishing (for example, boat-based fishing, spear fishing, fishing competitions)	4	7
Spiritual experiences	4	4
Scuba diving/ snorkelling (for example, shark cage diving)	3	5

The main activities that respondents participated in or planned to participate in were sand/ beach recreational activities (79% did participate and 17% would participate). As indicated by NDT (2016), sand/ beach activities include swimming, beach combing, kite-flying, sand dune surfing and making sandcastles. The prominence of sand/ beach activities resonates with the 3Ss (sun, sea and sand) activities being the main attractions for CMT as indicated by Carvache-Franco et al. (2019) and Eagleton and du Plessis (2019). Sandy beaches are identified as key CMT destinations in the South African context as identified by Lucrezi et al. (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 were followed by pure recreational activities (51% did participate and 22% would 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. These additional CMT associated recreational activities increase spend at CMT locations, thereby contributing to greater local economic impacts, as well as enhancing visitor experiences at the destination (Carvache-Franco et al., 2019; 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, where shops were the least identified beach user preference. In relation to other coastal tourism activities identified by NDT (2016), fewer respondents identified these activities. In relation to

sightseeing, 18% did participate and 10% would participate in this activity. Sightseeing was noted by Lucrezi et al. (2016) as a key activity that visitors to sandy beaches in South Africa participated in. For coastal heritage activities, 13% of the respondents indicated that they did and 9% would participate in this activity. Coastal heritage activities are noted by UNEP (2009) and South Africa has many heritage sites and experiences linked to the coast. 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.

The rest of the activities had less than 10% responses: wildlife tourism (9% did and 8% would), water sports (9% did and 7% would), events (9% did and 7% would), educational and scientific excursions (8% did and 7% would), ocean experiences (7% each did and would), recreational fishing (4% did and 7% would), spiritual experiences (4% each did and would) and scuba diving/ snorkelling (3% did and 5% would). Barbier (2017) and Dodd and Holmes (2019) indicate that important activities in coastal and marine areas are scientific and educational opportunities, especially in relation to environmental education. However, this study shows that in the Eastern Cape this type of activity is not widespread at CMT locations which can be strengthened in the future. The marine tourism activities identified by NDT (2016) had lower participation rates with all responses being less than 10%. This is dissimilar to other studies. For example, water sport activities are also popular at other CMT destinations, as shown by Lucrezi et al. (2016) and Tegar and Gurning (2018). 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). While this study did not probe which types of wildlife tourism activities respondents participated in, research indicates that whale watching, dolphin viewing and shark diving are key activities that are similar to other parts of the world (Kruger et al., 2018; O'Connor, Campbell, Cortez and Knowles, 2009; Tegar & Gurning, 2018; Tkaczynski & Rundle-Thiele, 2018), and 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 snorkelling. 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.

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.

Conclusion
Visitors to CMT locations in the Eastern Cape are from varied socio-demographic backgrounds. Adult visitors who frequented coastal and marine areas were mainly younger and middle-aged people. Gender differences were not discernible. Visitors were generally well educated. The differences among the visitors and the range of CMT products on offer suggest a diverse CMT landscape. Thus, marketing and management of these activities regions need to consider these differences. The ocean's economy potential is unlikely to be realised if CMT products and assets are not sufficiently considered, and marketing strategies that effectively target domestic and international tourists are not developed. This is especially true to coastal (sand/ beach recreational and leisure) activities as most respondents were less interested in marine tourism. The findings also indicate that visitors participate in multiple activities. It is

imperative that municipalities and agencies responsible for the management of CMT sites under their jurisdiction consider CMT visitor profiles and demand. In relation to the Eastern Cape, municipalities, CMT location managers and tourism officials need to focus on differentiated demands. For example, more overnight visitors are attracted to the Wild Coast, Jeffreys Bay and Nelson Mandela Bay, while a higher proportion of local resident visitation was noted in Nelson Mandela Bay. Understanding visitor demands assists with planning for 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. This study has shown that the Eastern Cape coastline is a key tourism destination, attracting visitors to these locations and contributing to the local economy.

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