

ADVENTURE TOURISM

SATSA ▶
The Voice of Inbound Tourism

101
Adventures
SOUTHERN AFRICA

Standing on the very edge of opportunity



CONTENT

Executive Summary	03
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CHAPTER 1

Beyond Adrenaline	04
You say risky, we say Tuesday	04
Why Australia is stealing our thunder (and how to get it back)	06
Ten adventure trends to watch	07
Urban adventures:	
Gateway experiences that matter	11
The Adventure Intensity Index (or why every adventure needs a heat warning)	12

CHAPTER 2

Spreading the Adventure Dividend	14
When traditional trackers meet paying tourists	16
Unlocking the map:	
The case for adventure corridors	17

CHAPTER 3

Building the Trust Economy	19
The cotton wool paradox	19
Going rogue: how the industry regulated itself	19
The cost of inconsistency	20
The 101 Adventures Initiative	20
The toolkit system: Practical regulation in action	21
The need for greater buy-in	22
Getting the international stamp of approval	23
Professional bodies:	
the bridge between standards and practice	24
The practical impact: Why it matters	25
Professional qualifications: the foundation layer	26
Critical Gap: First Aid Requirements	27
The path forward	27

CHAPTER 4

The Human Capital Revolution	28
The bedrock of adventure:	
technical competency first	29
The skills that matter most	30
Navigating the qualification maze	30
The skills that drive the sector forward	32
Breaking down barriers	33
Digital skills: The next edge	33
Women and youth: The future of the sector	34
Breaking through:	
a woman's journey in adventure tourism	34
Continuous learning, resilient careers	35
Strategic imperatives for skills development	36
The professional development pipeline	37
Critical Success Factors	37
The technical reality: why specialisation matters	38
What success looks like	39
Priorities for the next phase	39

CHAPTER 5

The Adventure Imperative	40
A roadmap for claiming South Africa's share	40
What we have: The foundation	40
What we need: The action plan	41
The call to action	41
The stakes	42

EXECUTIVE SUMMARY

Adventure tourism is no longer a niche market for adrenaline junkies. It's a powerful economic force reshaping how – and where – tourism revenue flows across destinations.

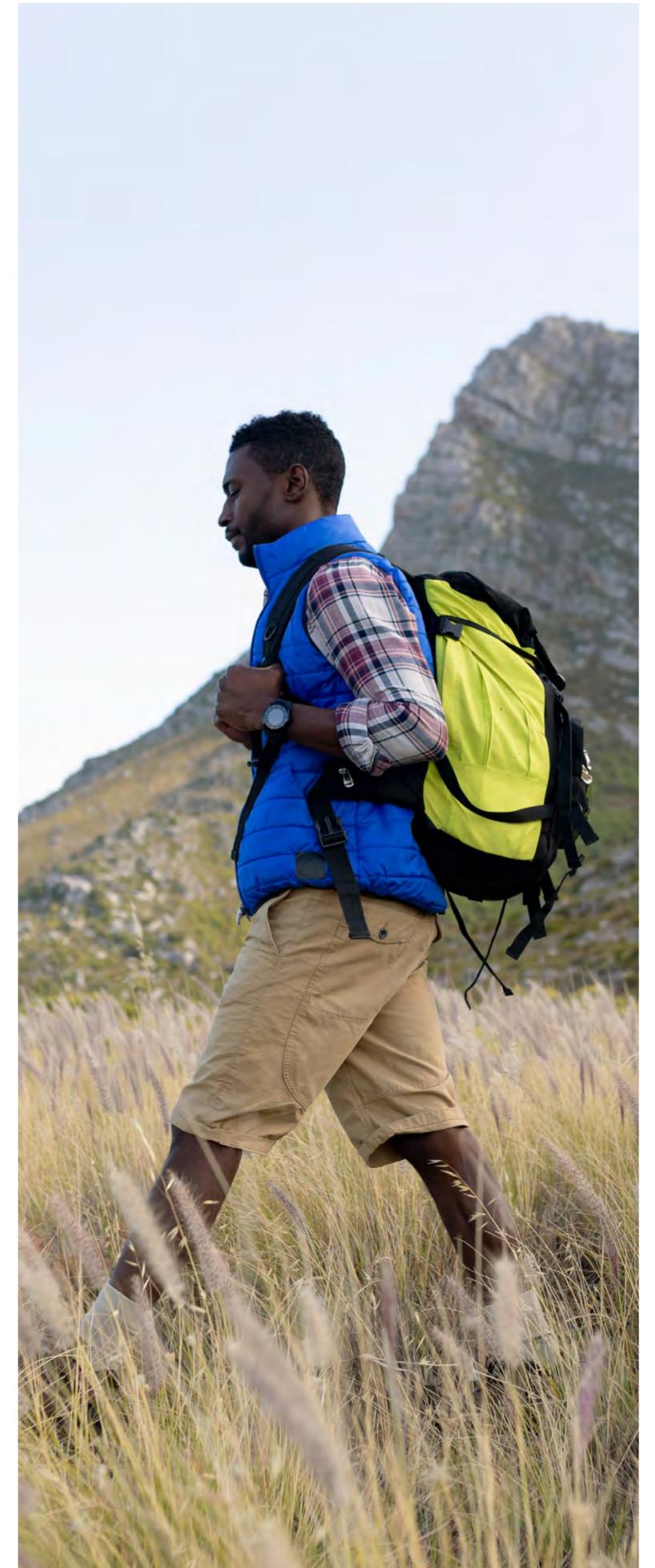
This white paper explores the global growth of adventure tourism and what it means for South Africa in terms of sustainable economic growth, geographic spread beyond established hotspots, and meaningful social inclusion in areas where unemployment remains stubbornly high.

A new report by SATSA and Futureneer Advisors on the **Economic Impact of the South African Adventure Tourism Industry** tells a compelling story: South Africa's adventure tourism industry generated **R10 billion in revenue in 2023** – rising to **R12 billion in 2024**. And this only includes direct expenditure at the adventure operator. It does not factor in spend on accommodation, transport or meals provided by other service providers to the adventure tourist. When you account for the full economic multiplier effect, the total contribution reaches a cool **R21 billion in 2023** and **R25 billion in 2024**.

Adventure tourism offers visitors something beyond familiar favourites like Cape Town and Kruger, dispersing economic benefits into rural corridors, mountain ranges, and coastal trails. It creates jobs for guides, shuttle drivers and hospitality staff – roles that keep value local and build career ladders for youth.

Critically, it also offers the kind of experiences today's travellers are looking for: cultural immersion, natural environments, and physical activity that creates authentic connection (and stories worth telling) rather than passive consumption.

As countries (and competitors) around the world double down on adventure tourism to drive regional development, South Africa has a choice: lead with our extraordinary diversity of product, or watch opportunity slip away. This white paper looks at what's possible – and what should come next.



BEYOND ADRENALINE

You say risky, we say Tuesday

The new adventure economy involves so much more than a bungee jump off Bloukrans Bridge. While South Africa can certainly deliver heart-stopping moments, the sector is evolving beyond extreme sports and emerging as an active, dynamic and diverse force to be reckoned with.

SATSA's **101 Adventures** initiative captures this breadth: from zip-lining through forest canopies and white-water rafting to gravel riding across the Karoo and multi-day, slack-packing trails in the Drakensberg, South Africa has well over 101 adventures. Each one an opportunity to tempt visitors beyond the usual – and into communities that have been waiting for their turn.

In fact, the global Adventure Travel Trade Association (ATTA), defines adventure travel as a trip that includes at least two of these three elements: physical activity, natural environment, and cultural immersion. Under this definition, a guided bush walk qualifies as adventure. So does a township cycling tour. You don't need to throw yourself

off a bridge to be an adventure traveller. You just need to show up with curiosity and a willingness to try something new.

“ The root of the word ‘adventure’ comes from the Latin **advenio – to arrive**

- Nic Shaw, SATSA Adventure Chapter, Chair

“But what it really means is there's uncertainty about that arrival. Adventure tourism carries an element of uncertainty because of its inherent risk. The participant feels the risk, but the whole purpose of it being a guided tourism activity is that the provider minimises or at least mitigates the objective risk. The balance we need to get right is to expose participants to perceived risk, but to minimise the objective risk.”

Canopy Tours South Africa founder and owner **Mark Brown** agrees: “Adventure to me is where the outcome is uncertain. If you know what's going to happen, then it's not an adventure. For international visitors, even a safari is

adventure tourism because around the next corner, you don't know what you're going to see.”



Quintin Smith, founder of Bikes ‘n Wines, draws a critical distinction: “My view is that adventure tourism is active travel to an unknown destination, with a sense of uncertainty and either perceived or actual risk. That’s where people talk past each other about hard adventure and soft adventure - but both fit. For some, a safari is a soft adventure. It feels slightly dangerous, but it’s accessible and commercial. Hard adventure is paddling down the Congo or hiking unsupported in the Cederberg; real skill,

“ Adventure tourism is - at its core - travel for uncertainty and risk. The difference is just scale: hard versus soft.

- Quintin Smith

real risk, but far less commercial.” This broader definition unlocks something powerful: geographic spread.

When adventure tourism includes hiking, biking, paddling, birding and cultural immersion alongside the big-ticket adrenaline activities, suddenly the whole country - not just Cape Town and Kruger - becomes relevant. Rural communities with incredible trails, rich cultural heritage, and wide-open spaces become viable tourism destinations. The Eastern Cape, the Karoo, the Wild Coast, the Drakensberg and the Northern Cape all benefit when adventure tourism expands beyond narrow definitions.

The global opportunity is massive. According to Fortune Business Insights, the worldwide adventure tourism market was valued at USD 804.51 billion in 2024 and is projected to grow to USD 1,682.28 billion by 2032, exhibiting a compound annual growth rate of 9.42%. Modern travellers - especially millennials and Gen Z - are driving this growth. They seek authentic, immersive experiences that allow them to connect with local cultures, landscapes, and communities.

South Africa already captures a substantial slice of this global opportunity, with vast untapped potential across the country.



Most Popular Adventure Tourism Type of Activity



Hiking



Zip Line



Animal Viewing



Cage Diving (Shark), Cycling



Boat Trips, Quad Biking



4x4, Animal Interaction, Bungee, eBikes, Motorbike Tours, Overland



Aerial Cableway, Rafting, River Cruise, SUP, Surfing, Teambuilding



Adventure Camps, Animal Rides, Canoeing, Classic Car Tours, Dirt Bikes, Driving Experience, Hot Air Ballooning, Kayaking, Kite Boarding, Mountain Biking, Segway, Sidecar Tours, Skydiving, Tubing

Source: SATSA Report

WHY AUSTRALIA IS STEALING OUR THUNDER (AND HOW TO GET IT BACK)

Other countries aren't sitting still. Jordan, reliant on historic sites like Petra and religious tourism centred on the Jordan River, is now focusing on its own adventure offering to support communities impacted by regional tensions. The 675-kilometre Jordan Trail has become a globally recognised drawcard, connecting hikers with diverse landscapes and local communities. They're hosting endurance events like the Marathon des Sables. It's a deliberate strategy: use adventure to create resilience when traditional tourism falters.

Australia – one of our biggest competitors – continues expanding its adventure portfolio, with regional Australia presenting massive opportunity. Sound familiar? They're also looking at geographic spread. And while the Great Barrier Reef remains a top diving destination, the Blue Mountains attract rock climbers and bushwalkers. Uluru combines adventure with Indigenous cultural immersion. Tasmania's wilderness draws hikers and kayakers seeking untouched beauty. Australia's marketing machine positions the country as the perfect blend of

excitement and nature, and they're winning consideration from the same travellers South Africa targets.

“We're better positioned than Australia because we have a much more diverse landscape. We have way more diverse wild fauna and flora than Australia does. And our people are great,” says Mark Brown. “Those three combined make for an adventure tourism paradise.”

Jessi Sunkel from SA AIA reinforces this competitive advantage:

“ South Africa has a bit of everything. You can experience almost all adventures in one province. You're going to South Africa to get a cultural experience in Vilakazi Street, then there's hiking nearby, and an hour away, we've got Cradle of Humankind.

This proximity advantage sets South Africa apart from competitors where tourists must choose between different types of experiences or travel vast distances between activities.

But Australia continues to market aggressively, and other competitors aren't standing still. South Africa must move fast to claim its rightful share.



TEN ADVENTURE TRENDS TO WATCH

1 “SOFT” ADVENTURES DOMINATE

Hiking, trekking, wildlife viewing, cycling and culinary or cultural immersion consistently rank as top activities in ATTA’s annual industry snapshots. Meanwhile, bungee jumping, shark-cage diving and extreme sports may generate media buzz, but the revenue mix skews softer than many assume. This matters for South Africa: we can design for volume and accessibility while maintaining our edge in spectacular, high-adrenaline experiences

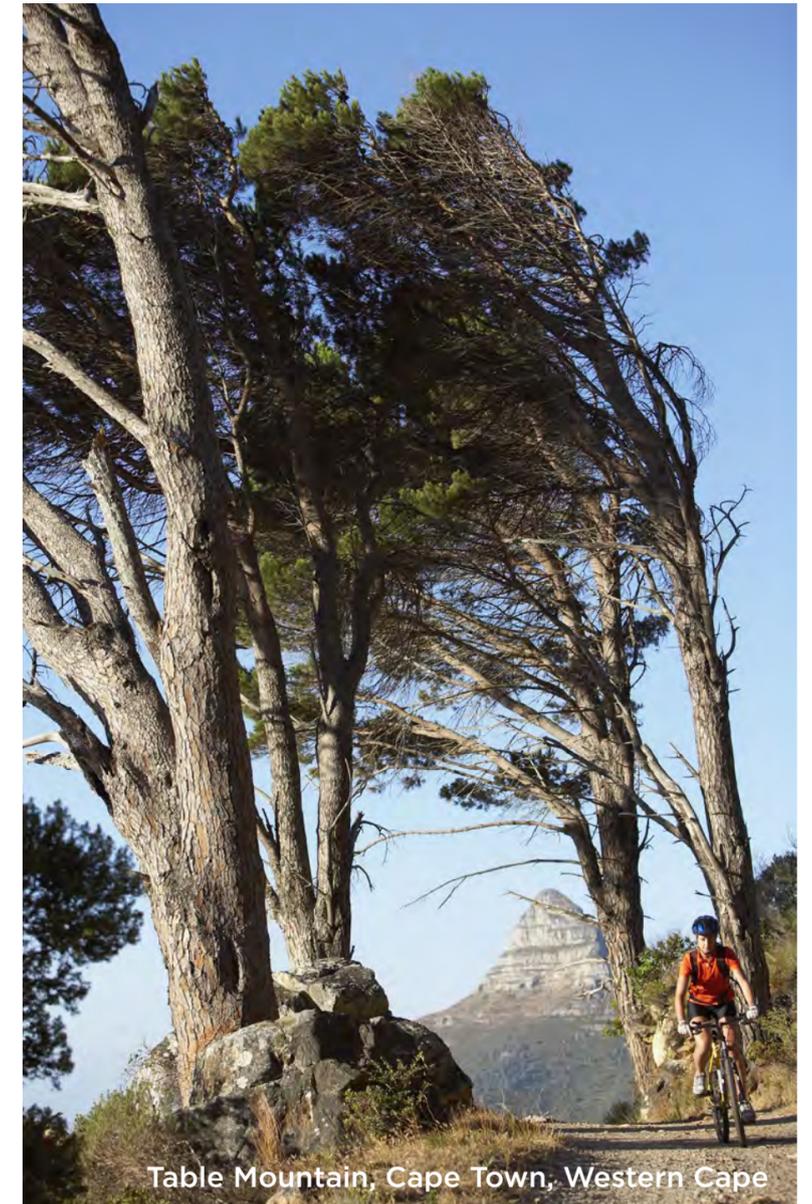


2 SAFARIS GET MORE “ACTIVE”

African safaris are increasingly designed around daily activity choices: guided walks in the bushveld, canoe or kayaking excursion, sleep-outs and mountain biking in conservancies. This appeals to younger, wellness-oriented travellers and extends stays in communities around national parks. It’s a differentiator against classic game-drive-only itineraries and positions South Africa as innovative rather than traditional.

3 MULTI-GENERATIONAL & WOMEN-LED GROWTH

In what could be the most exciting trend of them all, operators report continued strength in women-only departures and multi-generational family trips. In fact, Skift reports that nearly 40% of women planned solo trips for 2025 – an 8% jump from 2024. Behind these numbers is growing confidence in safety and a hunger for meaningful experiences, alongside a noticeable shift toward multigenerational trips and girls’ trips. Safe, well-guided active itineraries with flexible intensity perform strongly. This demographic shift expands the traditional market and rewards operators who design activities thoughtfully for varied abilities.

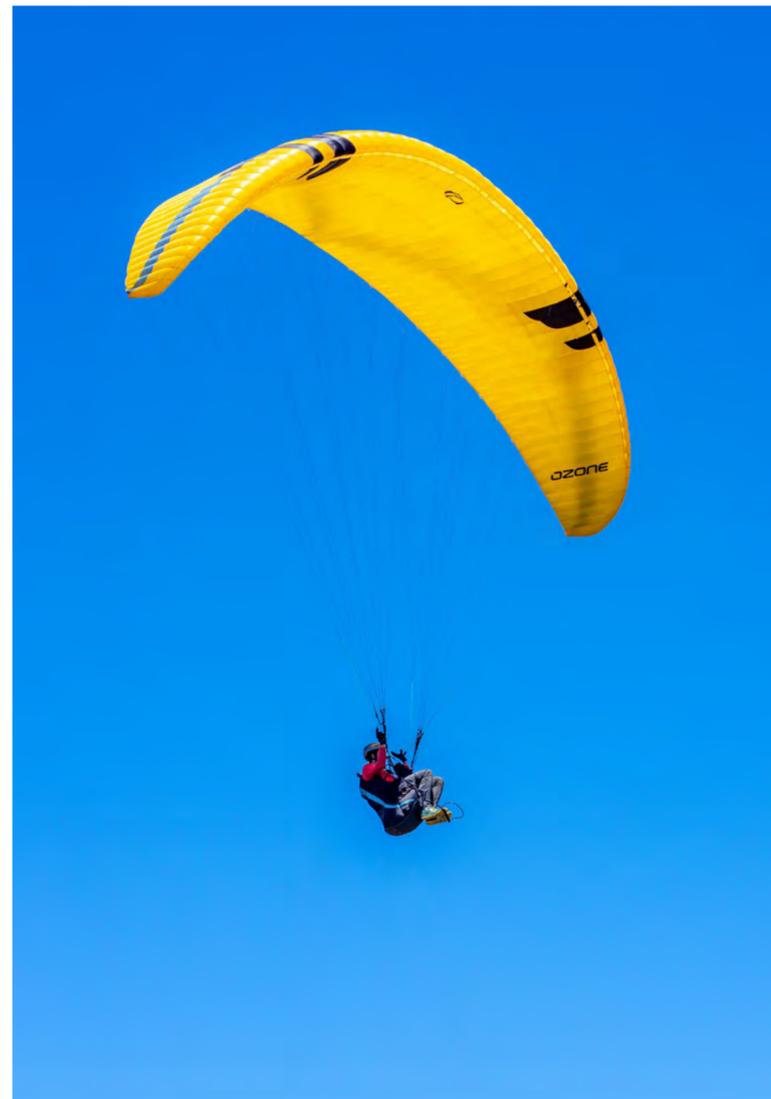


4 E-TECH FOR THE WIN

E-bikes (and even e-foils) make adventure sports more accessible and attractive than ever before. “New to adventure” segments can now buy confidently into activities that once felt intimidating. This is great for South Africa’s cycle trails and coastal products, which can suddenly reach urban, time-poor professionals who want adventures without a steep learning curve.

5 MICRO-ADVENTURES & SHORT BREAKS

Two- to four-day “micro-adventures” in and around cities are becoming more popular and urban-proximate product becomes a great acquisition funnel: first-timers sample adventure safely near Cape Town or Johannesburg, then book bigger trips inland. This isn’t cannibalising longer stays – it’s creating a pathway for local and international visitors who want to dip their toe in the proverbial water (see more below).

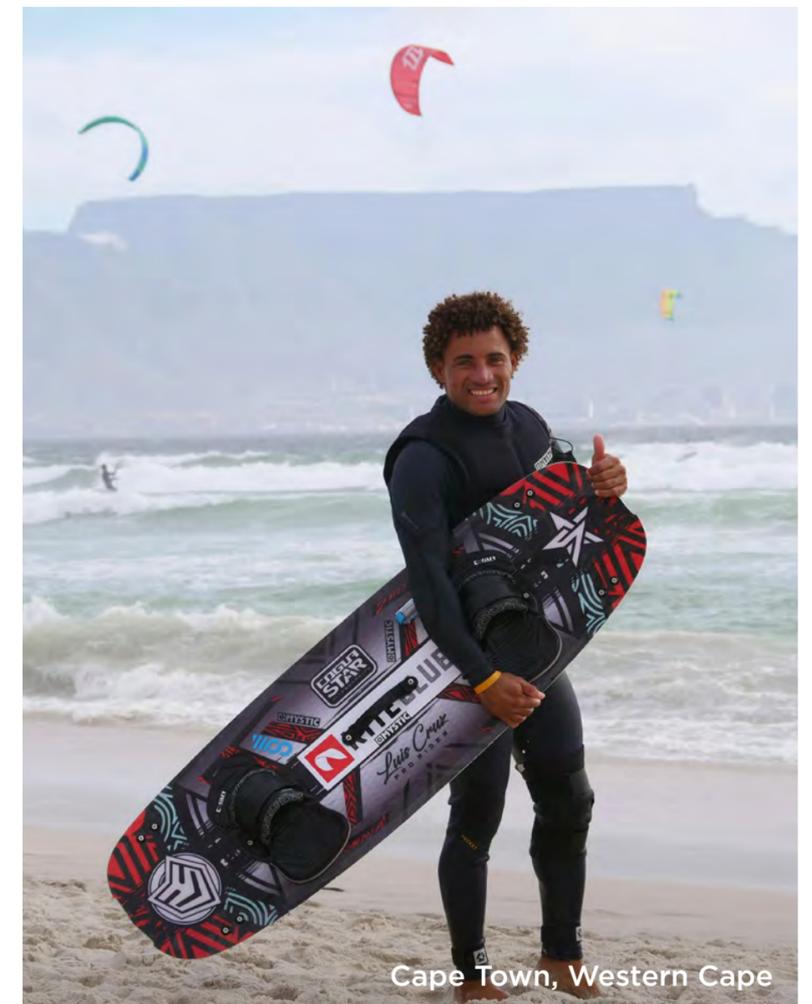


6 PURPOSE-LED ADVENTURES

Would you ever consider joining a research or conservation project (for example, bird tagging in KZN) on your break? Citizen expeditions – including marine tagging, trail restoration, invasive species removal – are shifting from niche to mainstream. Travellers increasingly want their adventures to mean something beyond personal experience and regenerative tourism itineraries (where you leave places better than you found them) are becoming powerful differentiators.

7 SHOULDER-SEASON ESCAPES

Climate change – and the soaring temperatures seen over Europe’s summer – are pushing operators toward shoulder seasons, dawn and dusk activities, higher altitudes, and coastal or marine products. Snow reliability is declining in many regions globally, which benefits South Africa’s non-ski, year-round assets. Summer alpine, via ferrata routes (established climbing routes already equipped with steel cables, ladders, and bridges), trail running, gravel biking, and water-based adventures are gaining share worldwide – and South Africa offers all of it.



8

REGENERATIVE ADVENTURES BEYOND SUSTAINABILITY

The adventure tourism conversation is shifting from “do no harm” to “leave it better.” Regenerative tourism, where experiences actively restore environments and strengthen communities, is moving from niche philosophy to mainstream expectation. This goes far beyond offsetting carbon or using biodegradable soaps.

Nic Shaw captures this evolution: “We’re moving beyond sustainability towards

regenerative. Sustainability is about making your footprint lighter, leaving less of a footprint. Regeneration is about putting your handprint down going forward – creating positive change, paying it forward, making a difference.”

Regenerative adventures include conservation-focused expeditions where visitors participate in marine restoration, alien plant removal, or wildlife monitoring. They encompass cultural experiences that directly fund community development projects or skills training programmes. They feature trail-building weekends where hikers

help maintain the routes they love or cycling tours that include stops at local schools or community gardens.

For South Africa, this trend plays to our strengths. Many of our most compelling adventure destinations sit within communities that could benefit from tourism investment – and not just visitor spend, but active partnership in environmental restoration and social development. Adventure operators who can demonstrate measurable positive impact gain access to conscious travellers willing to pay premiums for experiences that align with their values.



9

THE HARD/SOFT ADVENTURE SPLIT

The adventure tourism market is bifurcating into two distinct segments with different commercial realities. Smith explains: “Hard adventure is expedition-style where you might paddle the length of a South African river or hike unsupported for seven days. Soft adventure can be packaged as part of a vacation trip - easily accessible, done in a short timeframe.”

This distinction matters for operators. “It comes down to commercial viability. Can you sustain your business running one kayak trip a year on the Wild Coast, or do you buy kayaks and operate in Cape Town where you get hundreds of thousands of visitors daily? Both are adventure, but one pays the bills.”

10 → ADVENTURE UNPLUGGED

Perhaps the most powerful trend reshaping adventure tourism is its role in rebuilding relationships and transforming young lives. Multi-generational family adventures are booming, but this goes far deeper than grandparents joining hiking trips. Families are seeking shared experiences that strengthen bonds and create lasting memories away from the distractions of daily life.

This trend gains additional urgency when viewed through a skills development lens. The adventure tourism industry faces a critical shortage of appropriately trained professionals, particularly in specialised technical areas.

“Adventure guides really do need to specialise in their specific disciplines,” explains **Jessi Sunkel** from the South African Adventure Industry Association (SA AIA). “Nature guides can sometimes manage with broader training, but technical specialisation is essential in adventure guiding to ensure both safety and quality.”

The industry’s segmentation creates both career opportunities and training challenges. While basic adventure guiding provides entry-

level employment, progression requires additional technical competencies in specific disciplines like hiking, rock climbing, or multi-day expeditions.

Nic Shaw sees enormous potential: “The biggest growth area is rebuilding families – creating adventure activities that work around families and growing those relationships. I work primarily in transformative adventure for youth – taking them on expeditions through nature as transformative experiences”

Modern young people face pressures that adventure tourism is uniquely positioned to address. As Shaw observes: “Young people today are caged – they have a screen in their face. Adventure can uncage people, give them the space to play and explore their personal frontiers.”

This trend is seeing adventure operators design experiences with flexible intensity levels, multi-generational appeal, and moments for genuine connection. It opens new doors to educational tourism, youth development, and family-focused markets seeking authenticity, confidence-building, and reconnection in nature.

Ultimately, the world is changing. **Marie-Louise Kellet**, co-owner of Gravity Adventures and member of the SATSA Adventure Chapter puts it beautifully

when she says there is a desperate need for people to rekindle their connection with nature:

“Young people (at least some of them) are becoming disillusioned with the online world and yearn to be involved in something real. The influence of AI will accelerate this as we will shortly be part of an online version of the world where nothing can be trusted and where nothing is real,” says Kellett.

“ Nature-based tourism, especially experiential tourism, is one of the few ways to address this, and it would be a huge support if this was recognised by government and the industry at large. ‘Offline is the new luxury’ after all. Adventure experiences need to be valued more highly than they are at the moment, and this would support small, niche providers such as our company, to become more sustainable, financially, socially and environmentally.

- Marie-Louise Kellett

URBAN ADVENTURES: GATEWAY EXPERIENCES THAT MATTER

Of course, urban adventures are important too. And they serve a specific strategic purpose: they're a gateway for first-time or risk-averse travellers – and for time-poor MICE visitors. It also extends tourism spend into city neighbourhoods, supporting local economies often overlooked by more traditional itineraries.

Global examples abound. Dubai operates the XLine, the world's longest urban zipline at Dubai Marina. Sydney's Harbour Bridge climb is legendary. Brisbane's Story Bridge Adventure Climb? Equally iconic. Stockholm has guided rooftop walks. Singapore's Sentosa Island features ziplines and adventure parks. Hong Kong's Dragon's Back hike is accessible by metro.

South Africa's urban adventure assets are world-class but undermarketed. Cape Town offers paragliding from Signal Hill, trail running within Table Mountain National Park, sea kayaking from the V&A Waterfront or Simon's Town, surfing at Muizenberg and sandboarding at Atlantis Dunes. Johannesburg and Soweto feature the Soweto Towers bungee and SCAD freefall (Suspend Catch Air Device), guided township cycling, street-art runs, and sandboarding on old mine dumps. Durban's Golden Mile delivers surf-skate, beach runs, and Umgeni River paddling, plus trail networks around Umhlanga.

Urban adventures create cross-sell pathways to multi-day active safaris and rural trails. A first-timer from a long-haul market samples activity safely in Cape Town – paragliding, a township cycle, a coastal hike – then commits to a Wild Coast trek or Drakensberg hut-to-hut experience inland. It's sequencing that builds confidence and converts casual interest into committed bookings – but urban adventures have to be well-marketed if they're ever going to gain serious traction.

“ Urban adventure is a huge, underused opportunity in South Africa. Urban areas are where most people are, and for many, these are the first safe step into real adventure before venturing off into the wilder parts of the country

- Mark Brown



THE ADVENTURE INTENSITY INDEX (OR WHY EVERY ADVENTURE NEEDS A HEAT WARNING)



Everyone's different. Your capacity for adventure, physical exertion and even heights might be completely opposite to your partner's. Where a South African might find a game drive relaxingly tame, for a European tourist, it's thrilling.

“ There's an element of danger to a game drive because even though people who know game drives well know that it's very unlikely the elephant will knock the car over or that the lion will jump in, people from international countries always think that may happen. So that's why for them, it's an adventure.

- Mark Brown

SATSA's research shows that the **UK, Germany, USA** and the Netherlands provide - by far - the most adventure tourists to South Africa. But do they find the same things exciting?

Just like the Scoville scale rates chillies, adventure needs its own heat rating.

Cruise lines already do it for their shore excursions, for example, Norwegian Cruise Line (NCL) rates their excursions from level one (low demand) to level three (physically challenging), so guests understand what they're in for - before they sign up. Adventure tourism needs the same clarity, but perhaps with one addition: a "fright factor" for those terrified of heights, wildlife proximity, or open water.

Enter the Adventure Intensity Index (All): a 1-10 scale which would take physical exertion, technical skill, perceived risk and remoteness (and perhaps even different source markets' appetite for risk) into account.

QUICK EXAMPLES

- Classic game drive: 4/10 (no fitness or skill required, but the thrill of seeing the Big 5)
- Shark-cage diving: 8/10 across markets (high thrill, low skill)
- Multi-day Drakensberg hike: different hikes would be rated (for example, 7/10, 8/10 and 9/10) depending on the fitness, physical strength (if not slackpacking) and skill required.

WHY IT WORKS

Operators can communicate accurately by market (whether it's a guided safari walk (6/10) or technical trek (9/10), manage expectations and build progression pathways - wouldn't it be great if a 3/10 Cape Town micro-adventure becomes a gateway to a 6/10 Wild Coast trek.

Of course, the industry would need to come together to create a viable rating system. The outcome? Guests have clear, honest expectations before they book. Everyone wins.



Origin of Guests



Source: SATSA Report

SPREADING THE ADVENTURE DIVIDEND

SATSA speaks a lot about geographic spread. And for good reason. We know that certain regions have recovered to pre-Covid numbers, but many others are still struggling.



Cockscomb Mountains, Eastern Cape

Adventure tourism doesn't just generate revenue, it redistributes it. Adventure product naturally expands into secondary destinations, rural communities, mountain ranges, river corridors, and coastal trails. This spatial

rebalancing spreads visitor nights and spend across regions that have historically seen little tourism benefit.

This progression from established nodes to new natural assets to urban

experiences creates opportunities for repeat visitors who sample adventure safely in Cape Town, then explore the Eastern Cape or Karoo on subsequent trips.

As an example, the Jordan Trail links 75+ communities through volunteer trail crews, homestay hosts, and a trusted support structure that captures value for locals. It's a model of how deliberate design spreads benefit.

In Peru, community-managed campsites and porter or wrangler cooperatives along the Salkantay and Ausangate routes distribute income beyond the over-capacity Inca Trail. Rwanda and Uganda's gorilla trekking initiatives use high-value permits to fund conservation and community projects.

Scotland's Hebridean Way and Speyside Way anchor rural microbusinesses - including bag transfer services, B&Bs, distillery visits - demonstrating how trails stitch together existing assets and create economic resilience in remote areas.

South Africa has parallel successes to scale:

- Community-integrated slackpacking and hut-to-hut models in the Cederberg, Wild Coast, and Drakensberg use local hosts and porters, keeping spend in surrounding villages.
- Cape cycle routes and emergent gravel networks in the Karoo and Overberg link small towns with bike-friendly services – cafés, repair shops, overnight stops.
- Orange River rafting creates guiding jobs tied directly to park conservation funding.

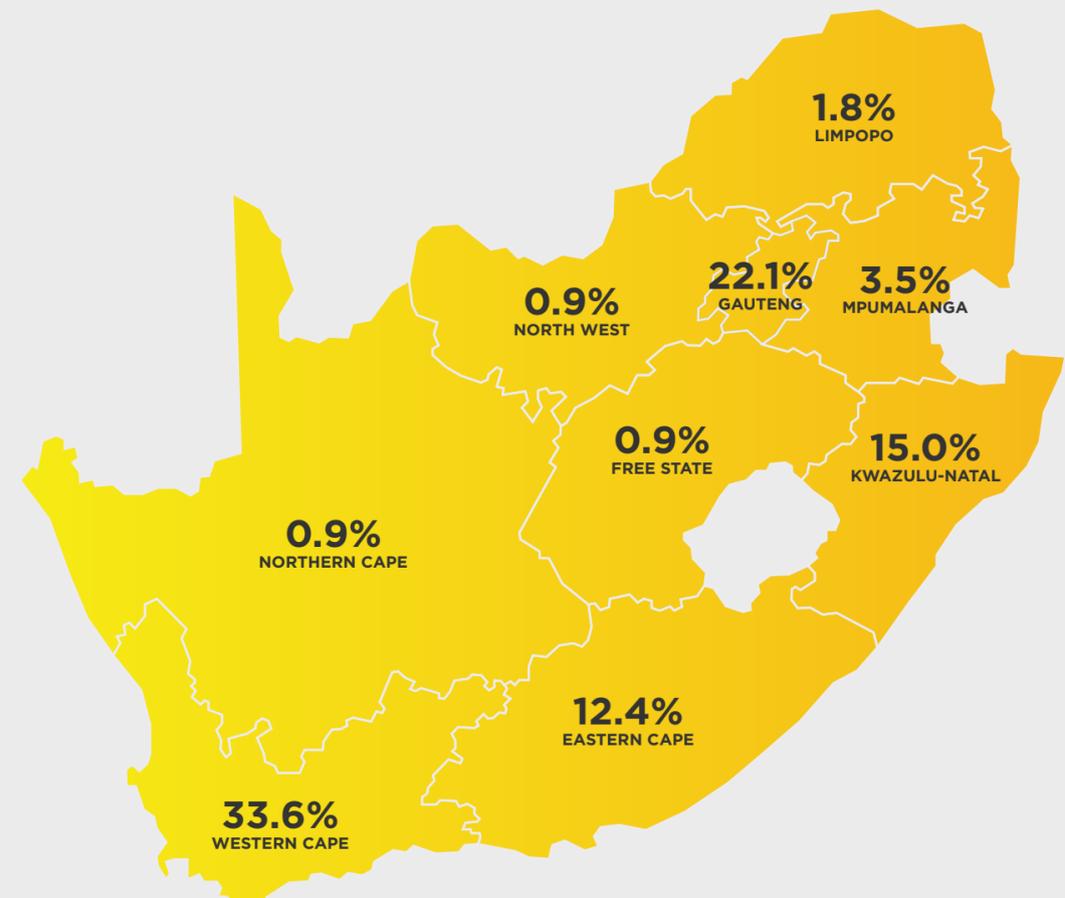
SATSA's 'Economic Impact' report shows that the Western Cape is still the main province when it comes to the number of adventure tourism activities offered, followed by KwaZulu-Natal and the Eastern Cape. But the lesson is clear: position South Africa's adventure corridors as "value chains," not just "routes" – with deliberate mechanisms to retain spend locally, monitor impact, and scale quality without losing authenticity. A 2013 ATTA and George Washington University study found that 66% of adventure trip spend remains in destination economies – a retention figure that underscores the community upside.

Mark Brown identifies three key growth patterns:

“ Firstly, and unfortunately the easiest, is that existing adventure nodes are growing – places like Cape Town, Garden Route. Then there's development around really cool, unique natural phenomena like giant holes, waterfalls, rivers. And lastly, urban areas: that's where all the population groups are.

Smith's experience illustrates this growth dynamic: "When we started Bikes n Wines eighteen years ago, there were three commercial cycling operators in the Western Cape.

In Which Province/Country is Your Main Office (headquarters) Based?



Source: SATSA Report | Location of Adventure Activity

Fast forward twenty years, and there are now 20 commercial operators, all commercially viable. The entire pie has grown 20 times the size.”

This growth demonstrates adventure tourism's potential, but Smith warns about geographic expansion: "You need critical mass of activity, accommodation, and accessibility to be self-sustaining. If it's a one-horse town with just one activity, it's not commercially viable. Hard adventure doesn't need infrastructure – people want remote, inaccessible locations. But soft adventure needs accessibility, ease of access, cost-effectiveness, and year-round sustainability," says Smith.

WHEN TRADITIONAL TRACKERS MEET PAYING TOURISTS

Indigenous-guided experiences add safety (reading weather, water, wildlife), deepen interpretation for guests and create distinctive intellectual property that cannot be easily replicated elsewhere. But it does require public-private-community partnerships (PPCPs) for success.

Co-design principles include:

- Free, prior, and informed consent (FPIC) for route access and cultural elements.
- Revenue-sharing and IP protection for stories, place names, and rituals shared with visitors.

- Training and accreditation pathways that recognise traditional knowledge alongside technical qualifications, creating legitimacy and career progression for indigenous guides.

RISKS AND HOW TO MITIGATE THEM

ENVIRONMENTAL RISKS: Trail erosion, wildlife disturbance, water stress, and the escalating impacts of climate change. The ecological crisis brings everything from droughts and floods to extreme weather events, while increasing pressure on diminishing wild animal populations during the sixth mass extinction. Mitigation: Includes caps on numbers, seasonal closures, guide ratios,

investment in maintenance funded by permits or levies, and climate adaptation strategies that protect both ecosystems and tourism infrastructure.

SOCIAL RISKS: Exploitation of traditional knowledge and cultural practices by commercial operators risks commodifying, misrepresenting, or eroding heritage. Mitigation: Only co-designed experiences with free, prior, and informed consent (FPIC), transparent intellectual property sharing, and strict protocols for cultural authenticity.

SAFETY AND LIABILITY RISKS: Inconsistent operator standards creating reputational damage for the sector. Mitigation: Includes clear sector guidelines, incident reporting, mandatory insurance and regular audits.

DEVELOPMENT RISKS: Not all development is appropriate or necessary. In sensitive environments, “no development” is sometimes the best option to protect ecological integrity and cultural value. The sector must resist overdevelopment—physical infrastructure isn’t always the answer. Mitigation: Mandatory environmental and social impact assessments, moratoria on development in priority conservation zones, and principles of ‘do no harm’ should guide all new product design.



Wilderness, Garden Route, Western Cape

UNLOCKING THE MAP: THE CASE FOR ADVENTURE CORRIDORS

“ The reality is, it’s easier to grow new adventure products where the crowds already are around existing nodes like Cape Town, the Garden Route, or Vic Falls. But the opportunity – and challenge – is to use those gateways to coax people out, so repeat visitors go deeper and spread the benefits further.

- Mark Brown

There are a number of things the industry should be doing now to unlock the map:



IDENTIFY AND BRAND 5 TO 7 “ADVENTURE CORRIDORS”

For example:

- Coastal: Wild Coast, Garden Route, West Coast (coasteering, surf, slackpacking)
- Mountain: Drakensberg, Cederberg, Fanie Botha (trekking, hut-to-hut).
- Desert/Karoo/River: Karoo gravel routes, Orange River rafting, Kgalagadi dunes (guided 4x4, dark-sky astro-adventures).



INTEGRATE PROFESSIONAL STANDARDS WITH GEOGRAPHIC DEVELOPMENT

Creating adventure corridors requires more than mapping routes. It demands ensuring every operator along these paths meets international standards. This is where SATSA’s 101 Adventures framework and the independent technical standards developed by professional bodies, such as the SA AIA Technical Competency Framework, work in tandem.

As Sunkel explains, “We’ve launched the SA AIA Technical Competency Framework so that everybody knows - whether you want to become a guide or hire one - exactly what is required for competence and safety.” For adventure corridors to succeed, these frameworks must acknowledge that different adventure activities require different specialist competencies.

Importantly, the challenge goes beyond basic qualifications to encompass real-world safety and risk management. “SATSA refers to ‘appropriate training’ in their self-regulation documents,” Sunkel points out. “From my side, our framework is designed to define exactly what constitutes appropriate training, particularly emphasising the need for wilderness-specific and technically robust competencies for guides operating in remote or high-risk corridor destinations.”

Augrabies Falls National Park, Northern Cape



ESTABLISH A MICRO-GRANT SCHEME

For community enterprises along designated corridors and tied to training and quality standards that protect both visitor experience and local livelihoods.



FAST-TRACK EVISAS & REMOVE RED TAPE

Consider a scheme (similar to TTOS) for adventure operators. Simplify drone and media permits for content capture on designated routes, with conservation conditions that protect sensitive areas.



BUILD A NATIONAL “ADVENTURE NOW, SAFARI NEXT” CAMPAIGN

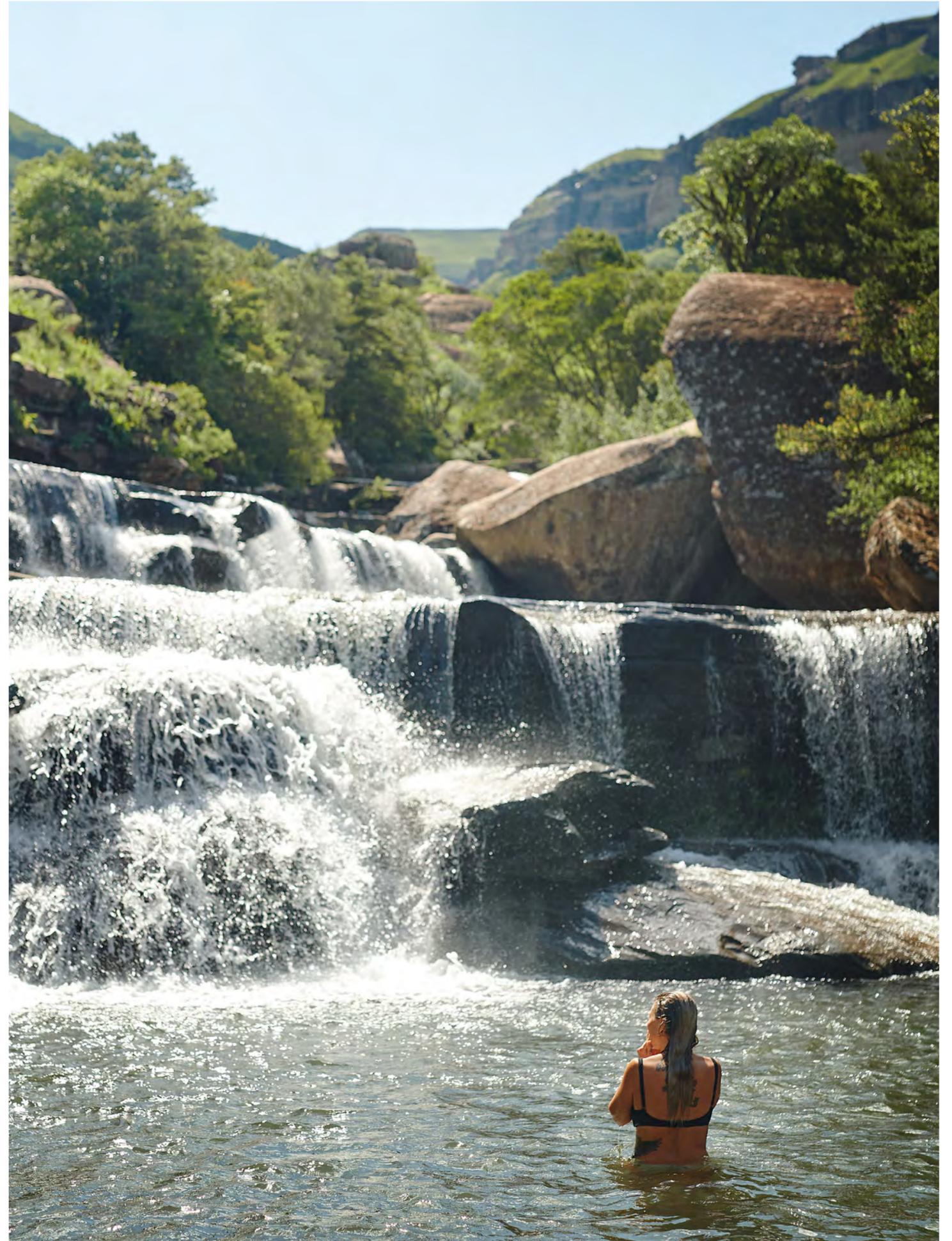
Use urban micro-adventures as the taste-maker for active safaris and rural routes, creating a deliberate funnel from gateway cities to inland experiences.



MEASURE!

Include a dashboard for each corridor that tracks jobs created (disaggregate by gender and youth), percentage of local procurement, trail condition scores, incident rates, and conservation indicators. Buyers increasingly demand traceable community benefit and credible safety standards – and adventure tourism can lead here if operators measure and disclose better than mass tourism.

The tools exist to amplify this impact. The only variable left is collective will.



BUILDING THE TRUST ECONOMY



THE COTTON WOOL PARADOX

“While Australia and New Zealand may call itself the adventure capital of the world, South Africa offers a far more diverse range of adventure experiences with superior products... we just need to position ourselves better globally,” says **David Frost**, SATSA CEO.

This captures South Africa’s fundamental challenge: we have extraordinary assets but lack the systematic credibility that converts natural advantage into market dominance. The global adventure tourism market, valued at \$1.1 trillion and growing, rewards destinations that solve what industry insiders call “the trust equation.”

GOING ROGUE: HOW THE INDUSTRY REGULATED ITSELF

Achieving consistent quality across an entire sector requires more than individual operator excellence. It demands systematic standards that the whole industry embraces. But this presents a unique cultural challenge in adventure tourism.

“ One of the reasons people get involved in adventure tourism is because they themselves like risk. They have a different risk appetite.

- Nic Shaw

This cultural reality creates both opportunity and risk for the sector. The appetite for risk that draws people to adventure tourism can sometimes work against the systematic thinking needed for professional standards. Shaw continues: “The danger is that some people with a very broad appetite for risk might be willing to not regulate so much, to not tick the boxes, dot the i’s and cross the t’s.”

Smith draws a crucial distinction: “What needs to be considered is whether it’s a commercial activity run by a commercial operator, or individuals doing something on their own. From a commercial aspect, self-regulation is vital; it’s about raising the bar on the sale of adventure tourism products. But someone climbing an 8,000-meter peak solo? That’s based on individual aptitude and ability, not operator qualifications.”

THE COST OF INCONSISTENCY

This tension has real market consequences. Despite world-class experiences, South Africa captures only a small share of the global adventure tourism market. Countries with far fewer natural assets – Costa Rica, Nepal, parts of Eastern Europe – outperform us in international bookings. The difference isn't product; it's systematic professional credibility.

The impact extends beyond individual businesses, as Shaw explains: "One poor experience can damage perceptions of a whole destination. It's not just about your own business; one operator's shortcomings become everyone's liability."

This collective vulnerability is what drove SATSA to action. "SATSA's first set of guidelines was released in 2023. It introduced a new level of compliance in a sector that was, at that point, largely unregulated," explains Hannelie du Toit, SATSA COO. The timing wasn't coincidental; the sector had reached a point where individual excellence wasn't enough to build collective credibility.

THE 101 ADVENTURES INITIATIVE

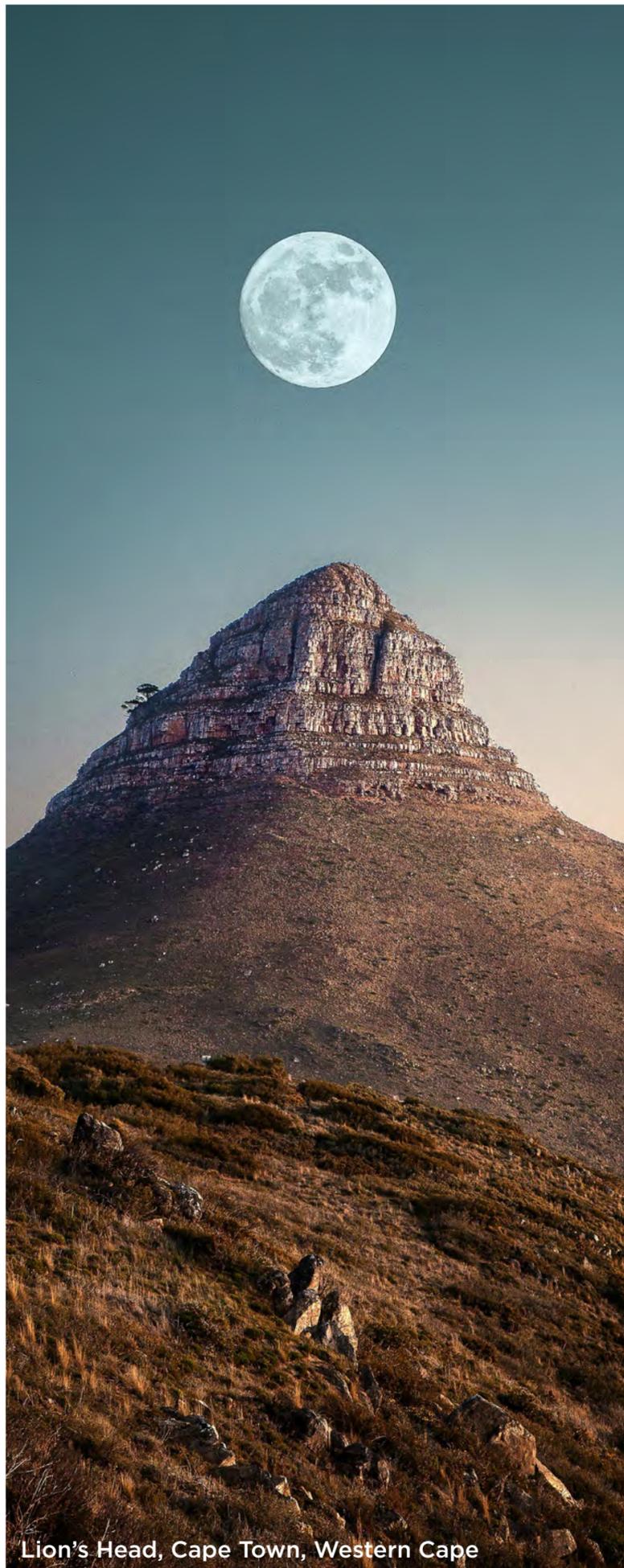
SATSA's response was characteristically collaborative. Rather than imposing standards from above, the organisation catalysed a regional movement for self-regulation. The "101 Adventures" initiative, launched in 2023, was created through the insight and direct involvement of sector leaders (such as Dirty Boots, SATIB Insurance, and Chrysalis Project) and guided by real-world feedback from dozens of operators and adventure experts.

This grassroots approach was essential for building industry ownership. As du Toit notes: "What's really exciting is the level of industry input and buy-in. Right from the very beginning in 2023, industry experts have really leaned in to offer their expertise and support."



Unlike government-imposed mandates, this framework is founded on voluntary industry ownership, making it:

- **PRACTICAL**
Toolkits and checklists available for every major adventure category
- **COLLABORATIVE**
Every update draws on direct operator feedback and input from neighbouring countries
- **DYNAMIC**
Living documents that adapt as technology advances, new risks emerge, and global best practices evolve



Lion's Head, Cape Town, Western Cape

THE TOOLKIT SYSTEM: PRACTICAL REGULATION IN ACTION

The framework's strength lies in its comprehensive yet practical approach. Each of the core 101 Adventures toolkits tackles a primary adventure discipline:

- 1. AERIAL NON-FLIGHT:** Zip lines, rope courses, canopy tours, suspension bridges
- 2. WHEEL-BASED:** Mountain biking, quad biking, ATVs, BMX
- 3. BOAT-BASED:** Whale watching, shark cage diving, marine tours
- 4. PADDLING & RAFTING:** Flat water, rivers, ocean - including all types of boats
- 5. HIKING & TREKKING:** From beginner walks to multi-day expeditions

Each toolkit includes:

- ✓ A self-regulation roadmap and clear SOPs
- ✓ A code of good practice and comprehensive checklist
- ✓ Participant care and environmental responsibility guidelines
- ✓ Review and publication dates, ensuring the system never stagnates

The international alignment was deliberate from the start.

Shaw explains: "The new documents align with international best practice, incorporating elements from ISO standards, European standards, Australian frameworks and input from the Adventure Travel Trade Association's (ATTA) Travel Life programme."

Since their launch, these resources have demystified compliance, empowering more than 2,000 operators (including many under-resourced businesses) to benchmark themselves and market their compliance as a competitive asset.

For operators who've engaged with the process, the impact is tangible.

“ I was part of the team that helped to develop the toolkits, so using them was already part of our approach. Having said that, it was very useful to work through the self-assessment and make sure that we were covering all the bases. We will be using our electronic certificate on all trade correspondence as a mark of credibility and quality.

- Marie-Louise Kellett

THE NEED FOR GREATER BUY-IN

However, industry leaders acknowledge that momentum is still building. The framework exists, but broader adoption remains a work in progress. Shaw is honest about current limitations: “The self-regulation process is crucial, but it hasn’t gained enough momentum yet for it to create confidence. In order for it to create confidence, we need more buy-in from operators.”

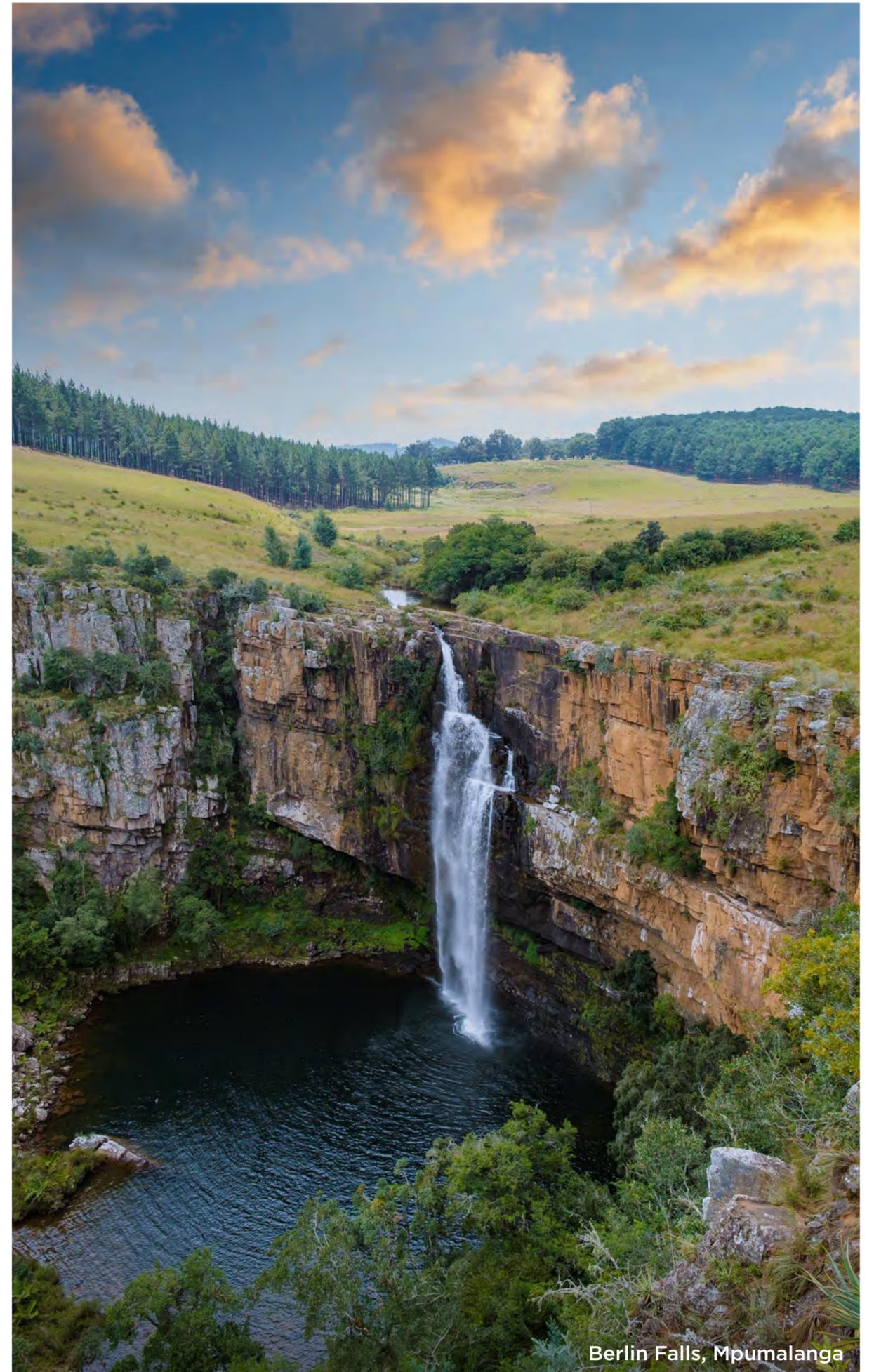
This assessment is echoed by operators in the field. Brown agrees: “Self-regulation is really good, but I think it’s going to take a few years for us to really understand the benefits. The seeds have been planted, and it’s definitely going to help, but I don’t think there’s been any noticeable difference yet.”

Smith sees the challenge differently: “There’s greater awareness of self-regulation domestically, but not wholesale adoption. We’re lagging behind countries like Australia or New Zealand where laws are more watertight. South Africans are inherently not rule followers - speed limits are speed suggestions. But it’s either the carrot or the stick. Self-regulation is better because you can guide the narrative.”

Yet all three see this as a necessary foundation rather than a failing.

“ A good place to start is self-regulation. Once someone has gone through the SATSA process, when South Africa implements international standards, which will happen at some stage, they’ll have everything in place. They’ll have the documentation and the systems to prove it.

- Nic Shaw



Berlin Falls, Mpumalanga

GETTING THE INTERNATIONAL STAMP OF APPROVAL

This is where international recognition becomes crucial. While 101 Adventures provides the foundation, global credibility requires global recognition. SATSA has entered into a strategic partnership with ATTA, which will transform how international markets perceive South African adventure tourism.

Shaw explains the significance and current status: “ATTA and SATSA have officially signed an MOU. There’s a lot of convergence of objectives and purpose.”

The strategic value of this partnership extends beyond recognition. Shaw continues: “ATTA is very involved and very aware of what’s happening at ISO international standards level as well. There’s a lot of congruency between what we’re doing within

the self-regulation process within SATSA, what ATTA is doing, and what ISO is doing.”

This alignment creates a pathway to international credibility that builds on, rather than replaces, the work already done. Shaw elaborates: “One of the ways to assure international clients that our adventures are safe is to have them conform to ISO standards, to international standards. And one of the big advantages of the SATSA self-regulation process is that we’ve made sure that the process that operators will go through will allow them to conform to those international standards.”

Market demand for this recognition is already emerging.

“ A lot of operators are starting to ask adventure companies whether we are members of associations and subscribe to codes of practice. A lot of that is pushed back from international markets – their insurers are saying, we’ll only send groups if you’re a member of some organisation and subscribe to rules.

- Mark Brown



Mossel Bay, Western Cape

PROFESSIONAL BODIES: THE BRIDGE BETWEEN STANDARDS AND PRACTICE

The relationship between SATSA's self-regulation initiative and professional bodies like SA AIA reveals how industry transformation happens on the ground. Jessi Sunkel explains the complementary roles: "SATSA is like a marketing agency with many tour operators. From our side, we are the professional body for the individual and an association for the school camping industry."

This division creates powerful synergies. While SATSA focuses on operator standards and market development, SA AIA concentrates on individual professional development and technical competency frameworks. "We keep each

other accountable. We're on each other's committees," notes Sunkel.

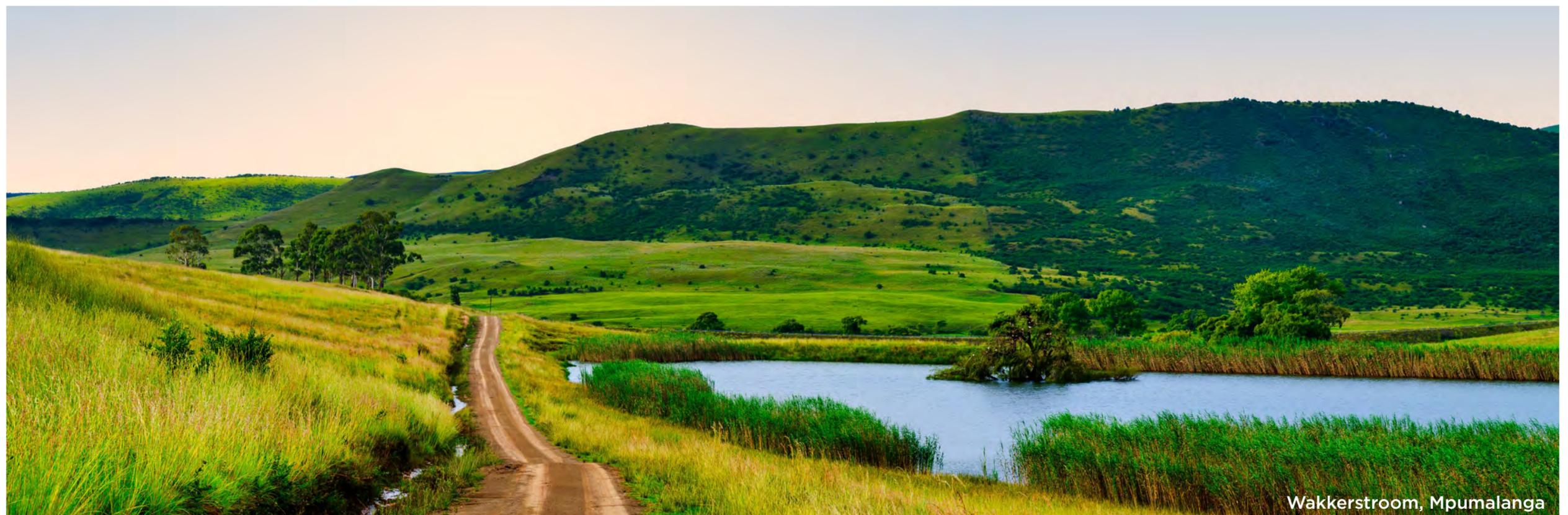
The collaboration is breaking down historical silos: "With SATSA's Adventure Chapter and SA AIA... there's been transparency and bridge building. People within their own technical segments didn't talk to each other – four-by-fouring didn't talk to hiking."

This alignment is crucial for international credibility. Terminology confusion creates market barriers: "Overseas, you talk about hunting as a safari. But in South Africa, a safari guide has an 80-year reputation of taking people

on wildlife viewing safaris," explains Sunkel. Clear, internationally recognised terminology helps overseas operators understand exactly what services they're purchasing.

“ If we all speak the same language – SATSA, professional bodies, qualifications authorities, tourism boards, marketing agencies, and regulators – then we can properly educate people overseas about responsible tourism.

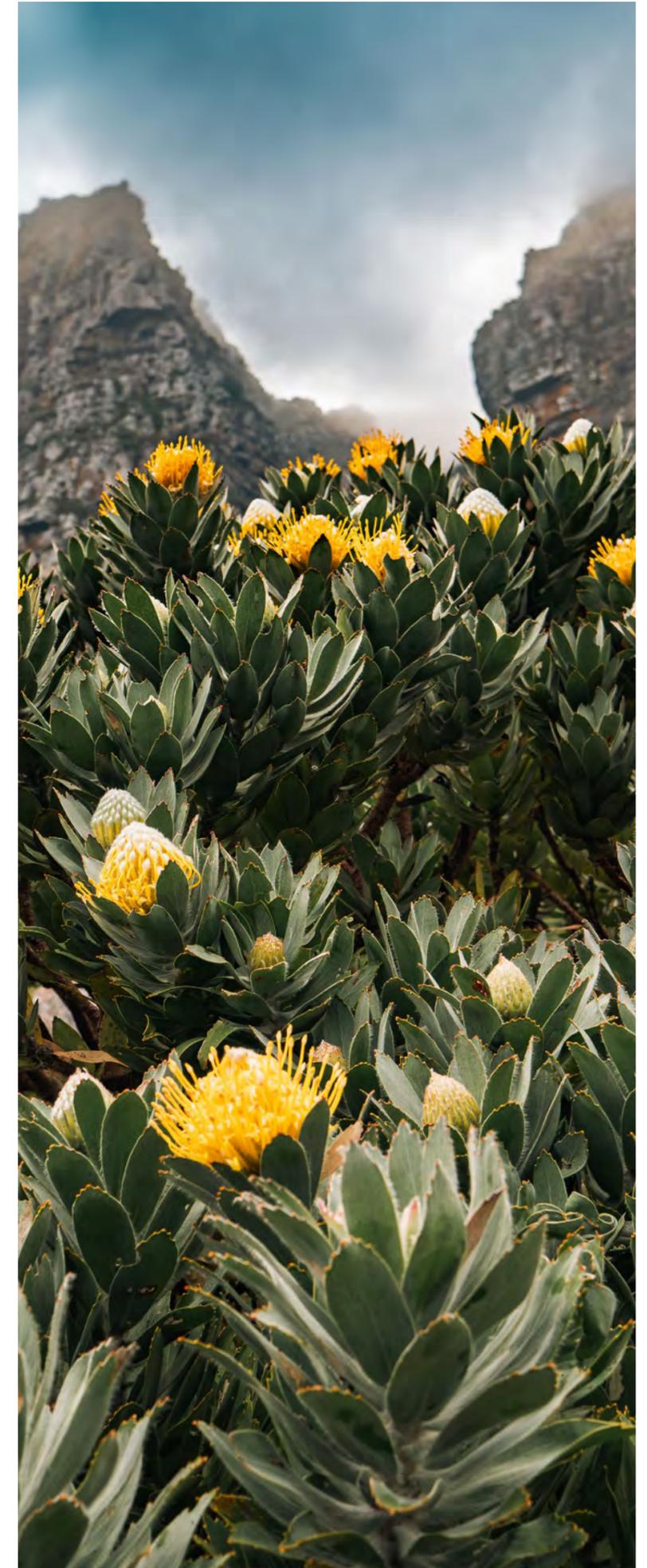
- Jessi Sunkel



Wakkerstroom, Mpumalanga

THE PRACTICAL IMPACT: WHY IT MATTERS

ASPECT	WITHOUT STANDARDS	WITH SATSA 101 CERTIFICATION
 Safety & Liability	Inconsistent safety protocols; increased risk of incidents; high liability exposure for operators and destination.	Industry-aligned safety benchmarks; reduced incident risk; clear liability management; improved insurance access.
 Reputation & Trust	Negative word-of-mouth from isolated incidents damages destination and operator reputation; hesitancy from trade.	Trusted “badge of quality” recognised by trade and consumers; positive reviews enhance destination brand.
 Market Access	Exclusion from international trade networks and contracts; buyers cite lack of assurance.	Easier access to global markets; meets requirements of international buyers and agents.
 Revenue & Growth	Lower average spend and limited repeat business; missed premium segments.	Higher-yield bookings; access to new source markets; increased customer lifetime value.
 Community Impact	Fewer sustainable jobs; less local buy-in; potential for social discord post-incident.	Enhanced job creation; skills development; stronger community partnerships and local value retention.
 Resilience	Vulnerable to crises and negative publicity; slow recovery.	Demonstrated best practice speeds recovery; resilient reputation attracts investment and visitors.
 Policy Support	Harder to attract government backing or incentives.	Strong case for public investment and supportive policy due to clear standards and impact tracking.



PROFESSIONAL QUALIFICATIONS: THE FOUNDATION LAYER



The adventure tourism industry operates on a complex qualification system that's currently undergoing significant transformation. Under South Africa's Tourism Act, guides must hold SAQA-accredited qualifications and register with provincial authorities. The industry is segmented into three distinct categories: nature guides, culture guides, and adventure guides - each with specific scope limitations.

“The guiding industry is actually segmented into those three, and they don't cross over unless they hold that qualification,” explains **Sunkel**. This specialisation creates both opportunities and challenges for the sector.

A major transition is underway from the current CATHSSETA system to the Quality Council for Trades and Occupations (QCTO). This shift promises improved portability between qualifications and greater involvement from professional bodies like SA AIA in defining technical competencies.

“ What will also happen with the new guide qualification is that there'll be portability. So, like, in varsity, if you earn credits, you can go to a totally different varsity or start a new degree, and those credits would carry.

- Jessi Sunkel

CRITICAL GAP: FIRST AID REQUIREMENTS

Current regulations require only basic first aid certification, which Sunkel identifies as often inadequate for remote adventure activities: “The minute you go to Cederberg or the Drakensberg... and you’re more than an hour away from help, you should have advanced First Aid training with wilderness focus... you are the help, so you have to wait an hour or ten days for help.”

For guides operating in remote areas, wilderness-based first aid training is essential. While international markets may expect wilderness-based first aid qualification, Jessi Sunkel from SA AIA emphasises a critical challenge: “SA AIA needs to make wilderness first aid more accessible and standardised. There are many operators claiming to offer wilderness first aid training, but it’s often a totally different qualification with varying standards.”

The industry urgently needs clarity on what constitutes legitimate wilderness first aid versus basic first aid with wilderness elements, ensuring guides receive training appropriate for the environments where they operate.



THE PATH FORWARD

“ This initiative is about positioning Southern Africa as the premier global adventure destination. We have the industry will - now we’re creating a framework that will drive growth, ensure safety, and spread tourism benefits to every corner of our region.

- David Frost

The progression is clear: 101 Adventures provides the foundation, broader industry adoption builds momentum, and the ATTA partnership delivers international credibility. Together, they position South Africa to compete on professional excellence rather than price, unlocking premium markets while empowering every operator to thrive.

The trust economy rewards those who solve the equation systematically. With 104+ adventure experiences, unmatched natural diversity, and now a pathway to internationally recognised standards, South Africa has everything needed to claim its rightful share of the global adventure tourism market. The tools exist, the framework is operational, and the international pathway is opening. Success depends on collective industry commitment to the standards that operators themselves created.

THE HUMAN CAPITAL REVOLUTION

Adventure tourism is catalysing real economic and societal change in Southern Africa. The industry's direct revenue grew from R10 billion in 2023 to R12 billion in 2024.

When the economic impact multiplier is applied, the sector's total contribution reached R25 billion in 2024. Behind these figures are thousands of people in new or better jobs – many in places and communities that tourism used to overlook.

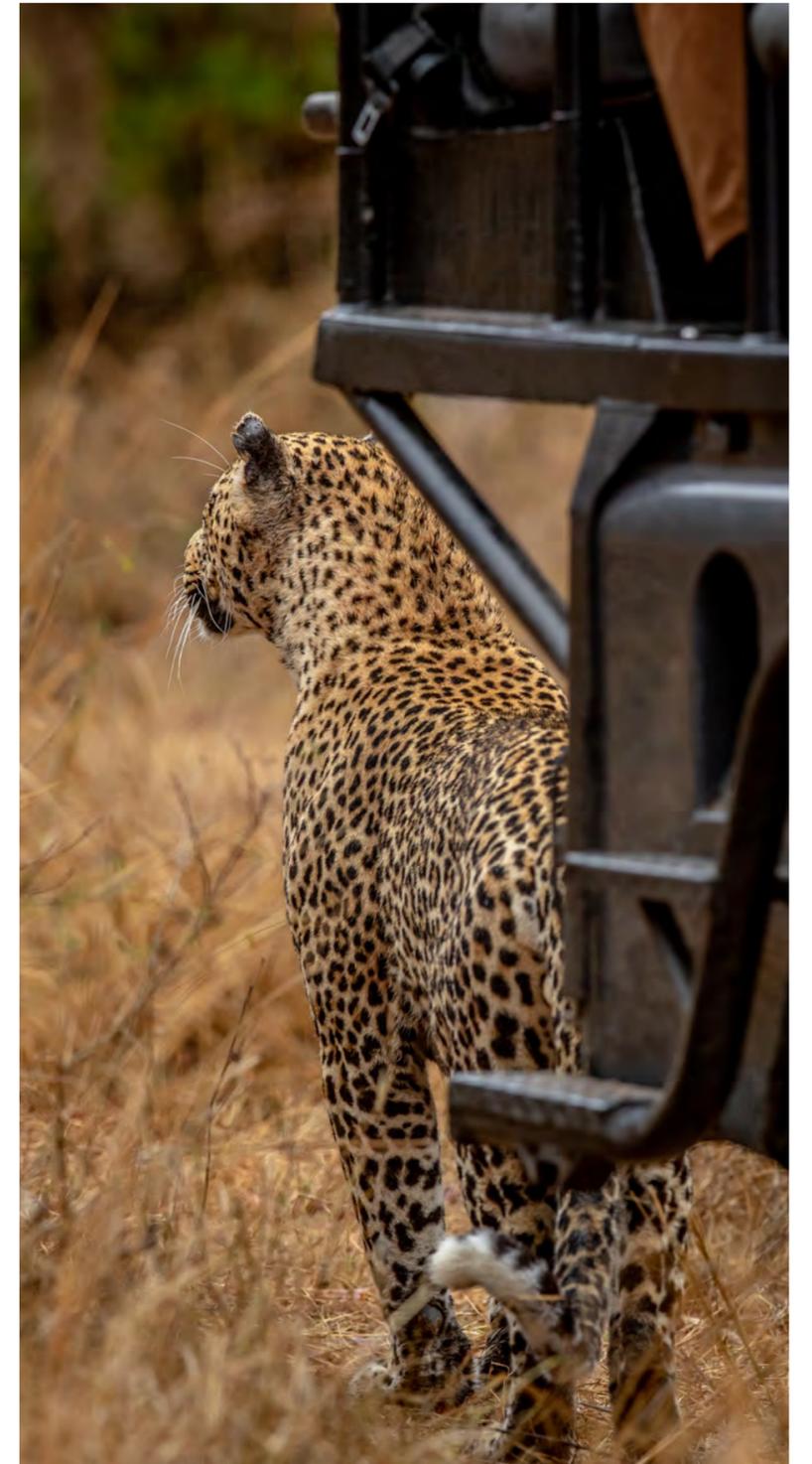
This growth is not just about more jobs, but about better work. The average gross revenue per adventure operator rose by 20% in a single year, a signal that skilled, professional staff are creating value, not just filling gaps. For young people, women, and entrepreneurs in rural areas, adventure tourism is becoming a credible career and a chance to build something lasting.

The launch of SATSA's 101 Adventures toolkit has triggered a move away from fragmented, informal jobs to structured, skills-driven opportunities. By setting

clear standards and making training accessible, SATSA and its partners are enabling more people – especially in underserved communities – to build livelihoods and become future leaders in the sector.

This transformation is deeply personal for many in the industry. **Nic Shaw** has seen this shift on the ground:

“ We trained a group of people from a very marginalised community in the Drakensberg as mountain guides. They had all the technical skills – they were trackers, hunters, poachers. But what they didn't have was the people skills, the empathy, the human connection. That's where we need to focus our attention.





THE BEDROCK OF ADVENTURE: TECHNICAL COMPETENCY FIRST

Adventure tourism is unique in that every reputable operator and guide must blend two skill sets: technical mastery for safe operation and human skills for guest experience. However, the starting point, the foundation of the sector, is and always will be technical competency.

“ If you don’t have the technical skills - rigging ropes, risk assessment, safety procedures, situational judgment - it doesn’t matter how good your storytelling is. The safety and credibility of your product depend on your technical training and your willingness to apply it.

- Marie-Louise Kellett

Technical competence and robust risk management are non-negotiable for:

- Preventing injury or loss of life
- Building trust with consumers (especially international markets)
- Ensuring a sustainable reputation for the destination

Yet, as Kellett points out, access to this training is deeply unequal: “While opportunities for young people in Cape Town are excellent, in rural areas, the greatest barriers to entry are the cost of training and certification. Without government support, many promising candidates simply can’t afford to become qualified guides.”

As a sector, this is a critical failing and should be top of any human capital agenda.

Storms River, Tsitsikamma National Park, Western Cape

THE SKILLS THAT MATTER MOST

Adventure tourism success is built on a foundation of technical ability: rigorous training in safety, equipment handling, weather interpretation, emergency protocols, and specific activity competence. Once this is in place, human skills – being able to read people, tell stories, and create a sense of belonging – are just as important. This insight is changing how the industry thinks about training and career development.

“There are lots of guides who are great abseilers or climbers, but they often don’t have that human connection. We need guides to be storytellers, not just leaders. Human skills, interpersonal skills, that’s where we need to focus,” says Shaw.

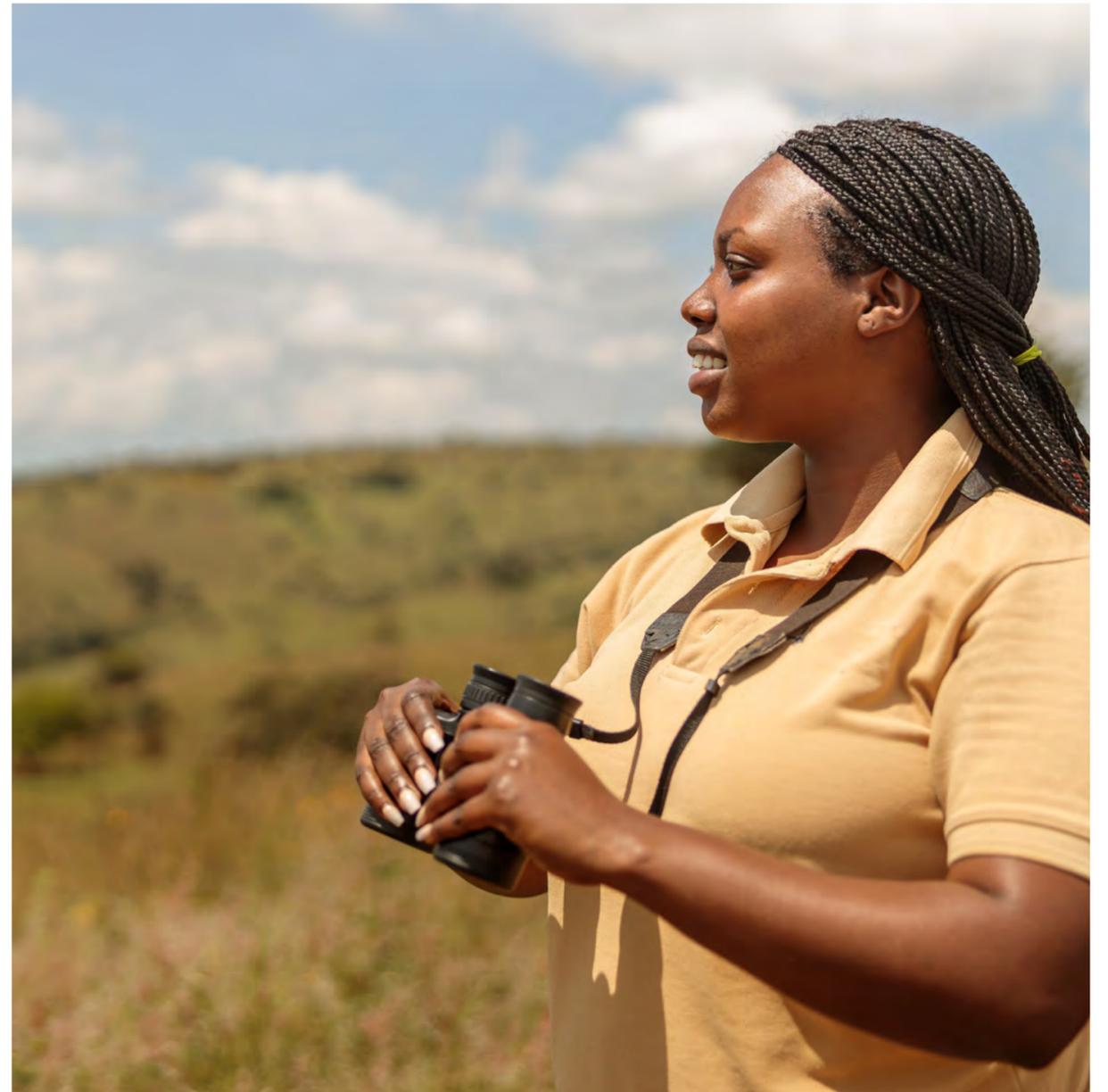
“ We don’t necessarily need new technical skills. The art of guiding, people skills, and storytelling - that’s what builds memories. That’s what makes people come back.

- Mark Brown

This shift toward human-centred skills reflects broader changes in what travellers want. They’re seeking authentic experiences and genuine connections, not just adrenaline rushes. This creates opportunities for guides who can create narrative experiences that resonate long after the adventure ends.

NAVIGATING THE QUALIFICATION MAZE

Adventure tourism’s human capital challenge extends beyond skills training to navigating South Africa’s complex qualification framework. The industry operates under strict regulatory requirements, but these are currently in transition.



“We’re currently in the process of creating the guide qualifications now with QCTO,” explains Jessi Sunkel from SA AIA. This transition offers opportunities for improved industry professionalisation, with professional bodies gaining greater input into technical standards.

However, the segmented nature of guiding creates career limitations.

“We have a current issue where, for instance, a guide might say, ‘I hike a lot, so I’ll take these clients out,’ but they haven’t actually been trained on essential safety protocols – things like emergency evacuations, or how to handle a river crossing during a flood. That’s the gap,” notes Sunkel.



Klipgat Cave, Die Kelders, Whale Coast

THE SKILLS THAT DRIVE THE SECTOR FORWARD

SKILL AREA	DESCRIPTION	BUSINESS BENEFIT
 STORYTELLING & HUMAN CONNECTION	Emotional intelligence, empathy, guiding guests through narrative	Memorable experiences; repeat business; positive reviews
 DIGITAL MARKETING	Social media, content creation, online reputation management	Direct bookings; broader reach; stronger brand
 REGENERATIVE TOURISM	Experiences that restore, not just sustain, communities & environments	Access to conscious travellers; positive impact stories
 RISK & CRISIS MANAGEMENT	Safety, scenario planning, emergency response	Reduced liability; business continuity
 CULTURAL COMPETENCY	Indigenous/local knowledge, language, co-creation	Authentic products; stronger partnerships
 ONLINE DISTRIBUTION	OTAs, GDS, direct-to-consumer sales	More revenue channels; better data
 CONTINUOUS LEARNING	Ongoing training, webinars, peer learning	Future-ready workforce; adaptability
 FIRST AID	Specialised medical training for remote environments; scenario-based emergency response	Legal compliance; reduced liability; guest confidence in remote activities
 TECHNICAL SPECIALISATION	Discipline-specific competencies (multi-day hiking, river crossings, weather assessment)	Access to premium markets; ability to operate in remote corridors; professional credibility



BREAKING DOWN BARRIERS

The sector is growing, but not everyone has equal access to opportunity. Women, young people, and rural entrepreneurs are still underrepresented, often held back by the cost or complexity of training and permitting. Small businesses can get lost in unclear requirements or struggle to afford time away from work to upskill.

This is where Shaw's broader perspective on adventure tourism becomes relevant. He sees the sector as addressing fundamental social challenges:

“ Our young people are screened - they have a screen in their face. We are losing the ability to make human-to-human connections. Adventure can uncage people, give them the space to play and explore their personal frontiers.

Operators consistently call for change: training that values practical skills, more mentorship, and support for those starting out. Reducing these barriers is essential for real transformation that reaches beyond established tourism centres.

DIGITAL SKILLS: THE NEXT EDGE

While human skills remain paramount, digital transformation creates parallel opportunities.

Smith offers a commercial perspective: “From an ease of booking standpoint, our digital footprint is world-class. We've got highly intuitive reservation technology, high-speed internet, everything needed. But that's not what makes the adventure - that makes the ease of booking. The product itself comes back to the guide. South Africans

are inherently friendly, open, welcoming. Our level of service delivery in hospitality is world-class, and we don't realise it.”

As the sector moves online, digital tools have become catalysts for growth, and digital marketing and booking skills are increasingly in demand. SATSA, with partners like Meta Boost and Digify Africa, has already trained 445 businesses free of charge - showing that digital skills can be a genuine bridge to new markets and customers. This training covered practical applications like WhatsApp business development, Facebook and Instagram marketing, and personalised advertising.





WOMEN AND YOUTH: THE FUTURE OF THE SECTOR

Adventure tourism is opening doors for women and young people in ways that traditional tourism often doesn't. More women are becoming guides, managers, and business owners, particularly in areas that emphasise customer service, safety management, and storytelling.

The 101 Adventures certification provides credible credentials that help women establish businesses and compete effectively in activities previously dominated by men.

Programmes that spotlight their achievements and encourage mentorship are building a visible pipeline for others to follow. This represents recognition that professional adventure tourism requires emotional intelligence, communication skills, and attention to detail alongside technical competence.

BREAKING THROUGH: A WOMAN'S JOURNEY IN ADVENTURE TOURISM

The transformation of adventure tourism's demographic is exemplified by operators like **Innocentia Mbuyane**, founder of Extreme Adventure Camp, whose journey illustrates both the opportunities and persistent barriers facing women in the sector.

"My inspiration for launching Extreme Adventure Camp came purely from my love of travelling and outdoor adventure. That passion naturally evolved into a desire to share those experiences with others through a structured, professional platform," explains Mbuyane.

Her path to business ownership required navigating multiple support systems: "I've been fortunate to receive valuable guidance and mentorship from Sigma International, financial coaching, and a grant from EUROPCAR that provided essential capital in the early stages."

However, challenges remain significant, particularly around market access: "Some international trade shows and roadshows are very costly to attend. Despite these limitations, I make sure to participate in local exhibitions to network and stay engaged with potential clients."

Mbuyane's experience reveals a crucial insight about the sector's potential: "There are countless opportunities available for women in adventure tourism; the main barriers are often a lack of access to information and mentorship. With the right guidance and support, women can explore these opportunities and fully embrace their potential."

The ripple effects extend beyond individual success:

“ My presence in the industry has an inspiring effect on my team and on local women and girls who see what is possible. They feel motivated by seeing someone they can relate to pursuing her dreams in a challenging field.

For the sector's future, Mbuyane emphasises both pragmatism and ambition: "Believe in yourself and never give up. Do your research thoroughly, stay informed, and remember, there's no shame in seeking help. My greatest hope is to see more women entering the adventure tourism industry and establishing themselves as leaders and innovators."

CONTINUOUS LEARNING, RESILIENT CAREERS

The pace of change in adventure tourism is rapid, driven by everything from evolving safety standards to new digital platforms. Regular quarterly webinars and ongoing toolkit updates from SATSA help operators and guides stay ahead of trends, regulations, and guest expectations. This culture of continuous learning is essential for a sector that must adapt to everything from climate impacts to new technology.





Wilderness Beach, Western Cape

STRATEGIC IMPERATIVES FOR SKILLS DEVELOPMENT

To maximise adventure tourism's employment impact and ensure transformation reaches previously excluded communities, the industry needs coordinated action across five key areas:

01

Expand accessible training programmes focused on core technical skills, safety, and professional certification, as well as targeting storytelling, human connection, and digital literacy – particularly for rural youth and women who face the greatest barriers to entry.

02

Create mentorship networks connecting experienced operators with emerging entrepreneurs, providing both technical guidance and business development support.

03

Develop career progression frameworks showing clear pathways from guide to storyteller to business owner, with recognised milestones and advancement opportunities.

04

Establish micro-finance schemes supporting equipment purchases and business start-ups, addressing the capital barriers that prevent many from entering the sector.

05

Measure and celebrate transformation through systematic data collection on employment diversity and outcomes, ensuring growth benefits reach intended communities.

THE PROFESSIONAL DEVELOPMENT PIPELINE

The adventure tourism industry's transformation depends on creating clear pathways from entry-level participation to professional expertise. This requires coordination between multiple stakeholders, each playing distinct but complementary roles.

Jessi Sunkel from SA AIA outlines the progression: "Kids need to be exposed to safe, exciting adventure from school – this is your school camp industry. As they grow, they need to see that this represents actual jobs, a potential career."

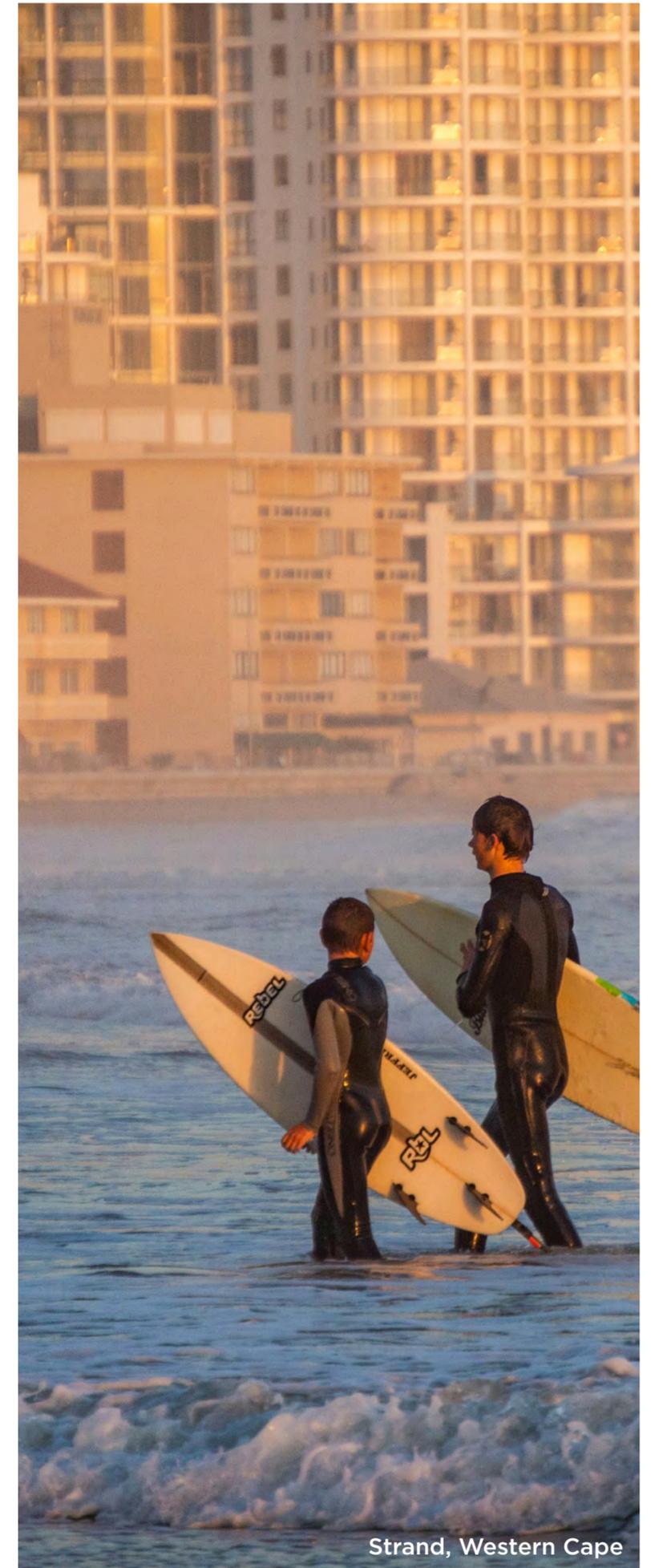
The pathway creates multiple entry points:

“ You don't have to be a guide or operator. You can sell equipment. There are many ways to access the adventure tourism market.

However, the current system creates barriers. The segmented qualification structure means "adventure guides will need to be specialised," limiting flexibility for career progression. The upcoming QCTO transition promises to address this through improved portability: "There's portability, like in university – if you got credits, you can transfer to a different university."

CRITICAL SUCCESS FACTORS

- **EARLY EXPOSURE**
School camping programmes that create passion rather than default career choices
- **MULTIPLE ENTRY POINTS**
Recognition that the sector needs retailers, operators, and support services, not just guides
- **SPECIALISATION SUPPORT**
Technical competency frameworks that allow career progression within specific disciplines
- **CROSS-SECTOR MOBILITY**
Qualification systems that enable movement between nature, culture, and adventure guiding



Strand, Western Cape



Table Mountain, Cape Town, Western Cape

THE TECHNICAL REALITY: WHY SPECIALISATION MATTERS

“ There were 300 rescues by the middle of 2025 on Table Mountain. None of them were guided trips.

- Jessi Sunkel

This statistic illustrates why adventure tourism’s emphasis on qualified, specialised guides isn’t just about regulation - it’s about safety and sustainability. Professional adventure guides provide:

- **RISK ASSESSMENT**

Reading weather patterns, water conditions, and terrain hazards

- **EMERGENCY RESPONSE**

Wilderness first aid and evacuation procedures

- **ENVIRONMENTAL PROTECTION**

Minimising impact through proper route selection and group management

- **CULTURAL SENSITIVITY**

Respecting local communities and heritage sites

The adventure industry’s future depends on distinguishing between qualified, commercial operations and unguided recreational activities.

WHAT SUCCESS LOOKS LIKE

Adventure tourism's employment transformation is already underway, but realising its full potential requires deliberate action. Success means rural youth in the Eastern Cape gaining the same access to professional adventure careers as their counterparts in Cape Town. It means women guides becoming business owners, not just employees. It means communities capturing tourism revenue directly rather than watching it flow through urban intermediaries.

The framework for this transformation exists through 101 Adventures certification and growing industry collaboration. The next phase demands

systematic implementation of training programmes that prioritise human skills alongside technical competence.

Most crucially, success depends on recognising that adventure tourism's greatest asset isn't the next piece of equipment or digital platform; it's people who can create authentic connections between travellers and South Africa's extraordinary landscapes and cultures.

Brown captures this perfectly: "Thumbs are not meant for the space bar on phones. They're meant for holding onto branches and paddles and ropes and things."

PRIORITIES FOR THE NEXT PHASE

The foundation for transformation exists. Success depends on:

- Expand sector-wide access to technical skills training and guide certification as the essential prerequisites for all adventure careers.
- Training programmes that put storytelling and human connection at the centre
- Accessible pathways that don't exclude rural youth and women due to cost barriers

- Recognition that adventure tourism employment creates globally relevant skills while keeping people rooted in their communities
- Industry commitment to measuring transformation, not just participation

The employment revolution is underway. The question is whether the industry will fully embrace the potential to create meaningful careers while ensuring that growth benefits the communities and young people who represent its future.



THE ADVENTURE IMPERATIVE



eMkhomazi (Umkomaas), KwaZulu-Natal

A ROADMAP FOR CLAIMING SOUTH AFRICA'S SHARE

The evidence is clear. Adventure tourism generated R25 billion for South Africa's economy in 2024, supporting over 91,000 jobs while spreading benefits into communities that traditional tourism bypasses. The global market will reach USD 1.68 trillion by 2032, growing at 9.42% annually. The question isn't whether adventure tourism represents opportunity – it's whether South Africa will act decisively to claim its share.

WHAT WE HAVE: THE FOUNDATION

- **NATURAL ASSETS UNMATCHED GLOBALLY:**
104+ adventure experiences across diverse landscapes
- **INDUSTRY-LED STANDARDS:**
The 101 Adventures framework providing credible self-regulation
- **INTERNATIONAL RECOGNITION PATHWAY:**
ATTA partnership bringing global credibility
- **HUMAN CAPITAL POTENTIAL:**
Communities with traditional skills ready for professional development

WHAT WE NEED: THE ACTION PLAN

- | | | | |
|---|---|--|--|
| <p>1 SCALE SELF-REGULATION</p> <ul style="list-style-type: none"> • Achieve 75% adoption of 101 Adventures certification within 18 months • Fast-track ATTA partnership to unlock international recognition • Create certification incentives through reduced permitting fees and insurance benefits | <p>2 DEVELOP HUMAN CAPITAL</p> <ul style="list-style-type: none"> • Prioritise storytelling and human connection skills in all training programmes • Establish mentorship networks connecting experienced operators with emerging entrepreneurs • Create clear progression pathways from guide to business owner | <p>3 BUILD ADVENTURE CORRIDORS</p> <ul style="list-style-type: none"> • Brand and market 5-7 distinct adventure regions beyond Cape Town and Kruger • Establish micro-grant schemes for community enterprises along designated routes • Streamline permitting for certified operators developing new products | <p>4 ADDRESS SYSTEMIC BARRIERS</p> <ul style="list-style-type: none"> • Private sector leadership on infrastructure challenges in key adventure regions • Coordinated advocacy for reduced bureaucracy and streamlined regulations • Public-private partnerships for safety and connectivity in adventure corridors |
|---|---|--|--|

THE CALL TO ACTION



FOR GOVERNMENT

- Recognise adventure tourism as a strategic economic development tool
- Streamline regulations and fast-track permits for certified operators
- Support skills development through existing training frameworks



FOR INDUSTRY

- Embrace 101 Adventures certification as competitive advantage, not compliance burden
- Invest in human skills development: storytelling, empathy, cultural competency
- Collaborate on corridor development rather than competing for individual advantage



FOR COMMUNITIES

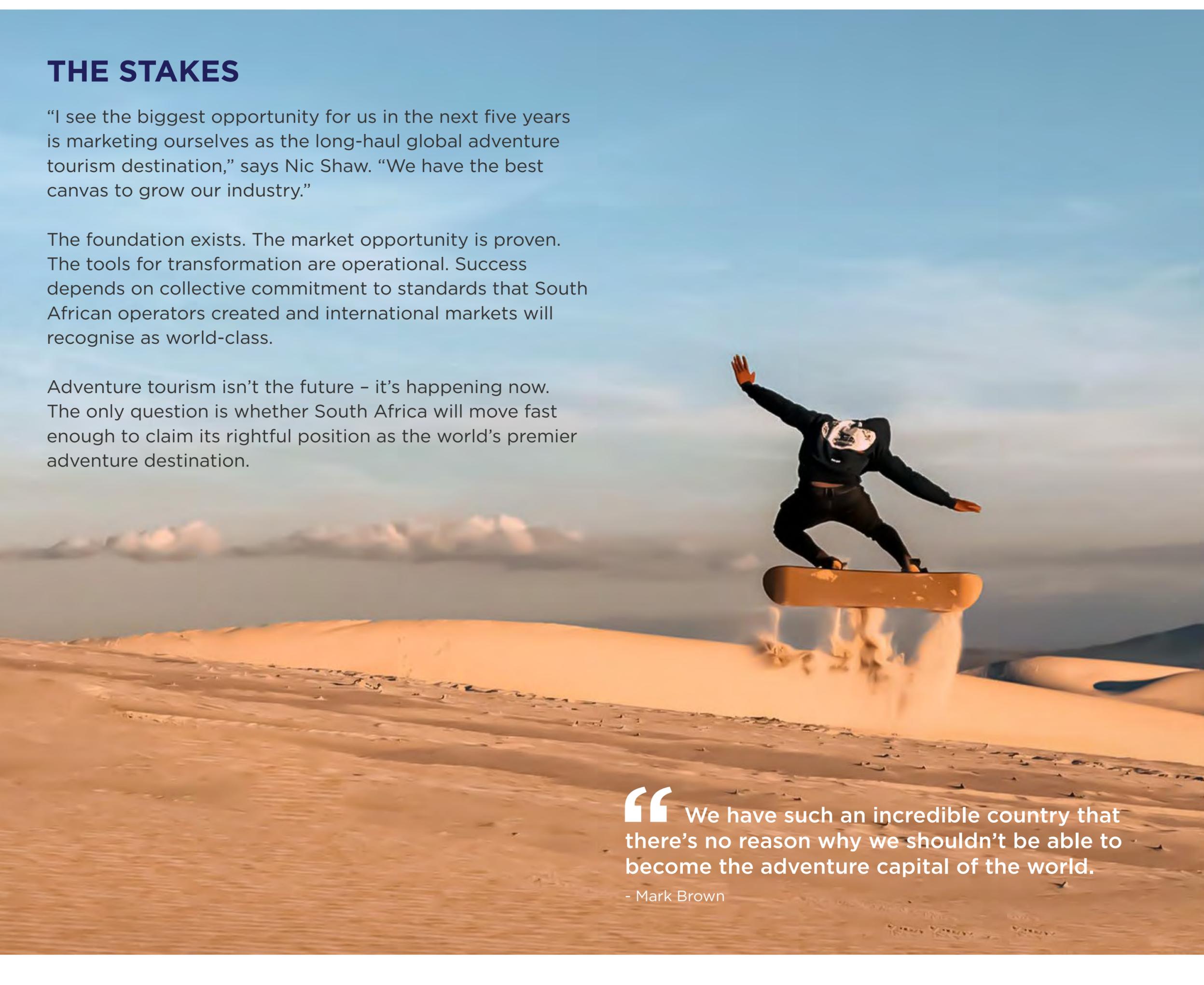
- Engage actively in co-design of adventure products that respect local culture
- Participate in training programmes that build both technical and interpersonal skills
- Claim ownership of revenue-sharing and benefit distribution mechanisms

THE STAKES

“I see the biggest opportunity for us in the next five years is marketing ourselves as the long-haul global adventure tourism destination,” says Nic Shaw. “We have the best canvas to grow our industry.”

The foundation exists. The market opportunity is proven. The tools for transformation are operational. Success depends on collective commitment to standards that South African operators created and international markets will recognise as world-class.

Adventure tourism isn't the future - it's happening now. The only question is whether South Africa will move fast enough to claim its rightful position as the world's premier adventure destination.

A person in a black snow suit is captured mid-air, performing a snowboard trick on a sand dune. The snowboarder is wearing a black jacket with a white graphic on the back and black pants. The snowboard is orange. A cloud of sand is kicked up from the board. The background shows rolling sand dunes under a clear blue sky with some light clouds.

“ We have such an incredible country that there's no reason why we shouldn't be able to become the adventure capital of the world.

- Mark Brown

