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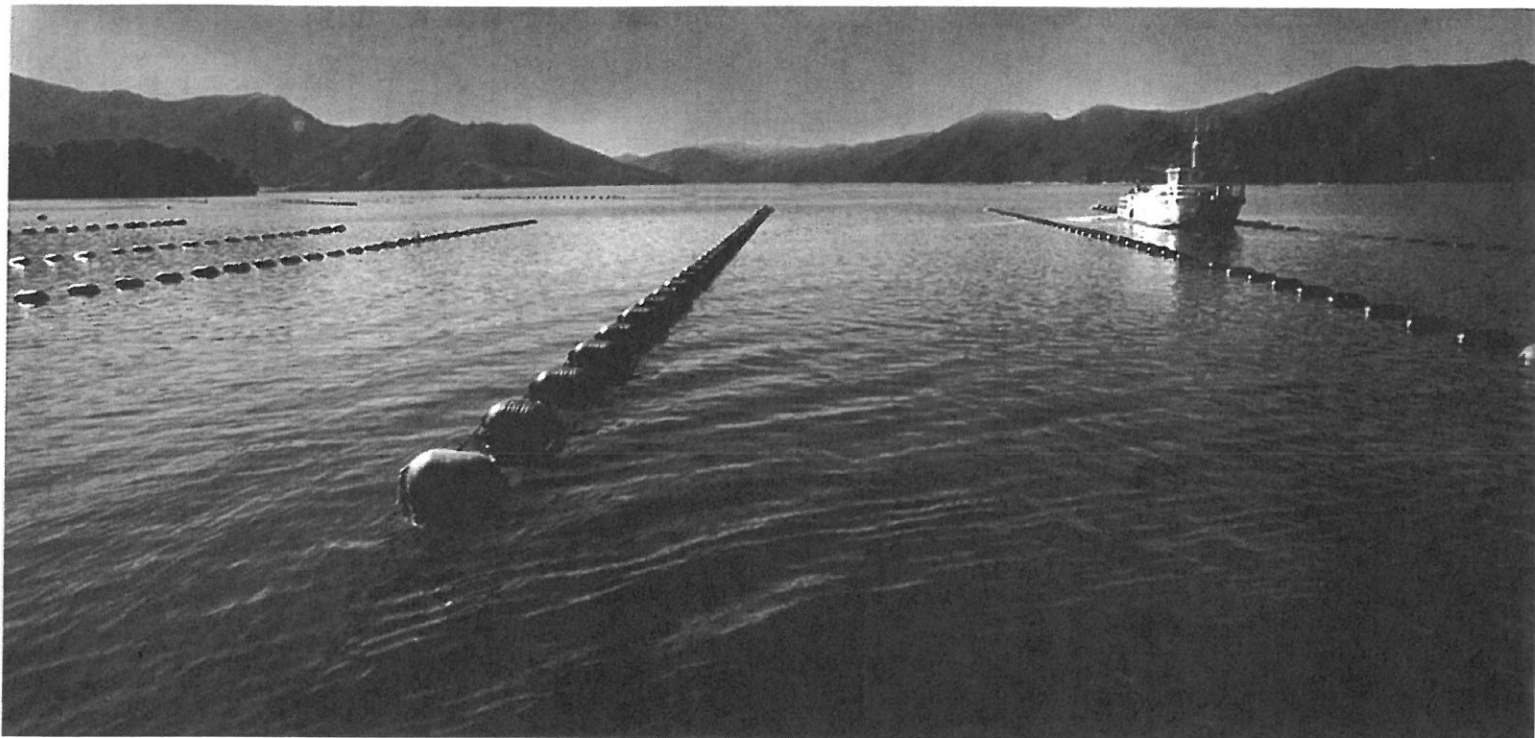
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# Marine farming and tourism

Are local tourism businesses interested in developing a positive relationship with the marine farming industry? To help answer this and related questions, Laura Jodice, John Hull and Agnes Sirima review results from their interviews with businesses in the "Top of the South Aquaculture and Seafood Trail" region.

At the 2009 Cawthron Aquaculture NZ Conference in Nelson, more than 40 participants attended a breakout session on continuing research linked to the "Top of the South Aquaculture and Seafood Trail". The Marine Farming Association (MFA) initiated the Trail in 2005 to highlight marine farming products and experiences in the region (see box). For the session, Dr. John Hull, from the New Zealand Tourism Research Institute (NZTRI) at Auckland University of Technology (AUT), summarized results from interviews and surveys conducted in 2008 with local businesses and planners (coastal and tourism) associated with the Trail and preliminary results from a visitor survey started in 2009. Some of these results were initially reported in the December 2008/January 2009 issue of *Seafood New Zealand*.

The Aquaculture NZ conference session provided an open forum for participants to discuss concerns relevant to any business contemplating investment in seafood and tourism industry linkages. Many expressed enthusiasm for the idea of further developing a marine aquaculture related tourism trail

throughout New Zealand. However, they also asked fundamental questions underlying any seafood and tourism partnership. These were: (1) how interested are locally owned tourism businesses in partnering with marine farms, (2) what is the potential marketing impact of the Trail on export markets for seafood, and 3) is the Trail a significant tool for increasing the public's knowledge and understanding of marine farming?

Unfortunately, past research has not evaluated the economic performance, sustainability, and educational impact of a themed tourist trail (or similar products integrating food production and tourism clusters). In general, assessment prior to development of a seafood themed trail should include an inventory of the experiences and products available or possible in the coastal region (supply) as well as identification of target markets and visitor preferences (demand). In addition, uncertainties in aquaculture reform policy and limits to expansion likely impact the willingness and capacity of seafood businesses to invest time and money in tourism partnerships

and influence attitudes among tourism businesses and residents regarding marine farms. Therefore, investigating the institutional, social, economic, ecological, and entrepreneurial capacity for creation and support of these market linkages is essential.

The *Top of the South Aquaculture and Seafood Trail* (Trail) has offered an excellent opportunity to investigate potential for partnership and sustainable economic linkages between seafood and tourism clusters for several reasons. The Trail was a seafood industry led effort and has been in operation for a few years. The MFA engaged partners through meetings between MFA Executive Officer Graeme Coates and the businesses that fit the Trail theme. They received sufficient response from local tourism business, restaurants, seafood retailers, and seafood processors to enable production and distribution of the Trail brochure. This effort laid the foundation for marketing cooperation around related activities and attractions.

In 2007, NZTRI identified the Trail as a useful case study for exploring participant

perspectives on the potential for seafood and tourism linkages. At that time, the MFA also needed to evaluate the Trail's success and develop a strategic plan for marketing and product development. In June 2008, researchers from NZTRI and Clemson University (in USA) visited the Nelson/Marlborough region to interview local business managers and owners involved in building tourism and seafood linkages. The goal was to identify: (1) the characteristics of seafood related services and products targeting tourists; and (2) the strengths, weaknesses, threats and opportunities associated with the Trail. Some of the results help to answer industry questions.

## Research Methods and Findings

The supply of seafood and tourism businesses is not a problem in the Nelson/Marlborough region, where the trail is located. These tourism and aquaculture clusters have independently played a major role in the local economy and have grown tremendously over the last 30 years. Initial investigation revealed scattered involvement of local tourism business entrepreneurs and seafood producers in developing seafood and tourism partnerships in the region, both through independent endeavours and in response to Trail development. The NZTRI research team compiled a comprehensive list of these businesses through recommendations from the MFA, tourism representatives, and website searches. Selection of interviewees from this list was based on willingness to participate and availability.

The interviews occurred at each participant's place of business and using a set of questions designed to guide open-ended discussion. The research team interviewed 24 of the local businesses. A short written survey was also used to gather additional background information from participants. Two research team members independently analyzed the transcribed audio-recordings of the interviews to identify major emergent themes.

The average age of interviewees was 48 years old (ranging 30 to 63 years) with the majority having tertiary level education and 52.4 per cent being long-term residents (over ten years). Participants represented a range of business sizes, with 33 per cent operating small (less than NZ \$250,000 annually), 48 per cent operating medium (NZ\$251,000 to 5 million annually) and 19 per cent operating large (more than NZ \$5 million) sized enterprises. Companies that were primarily



tourist oriented were small-to-medium sized enterprises, whereas seafood companies were medium-to-large sized.

### Characteristics of seafood and tourism related products and services

One-fourth of respondents were seafood companies (aquaculture, seafood processing, seafood retail), and the remainder were tourist oriented companies. One-third of the businesses interviewed were already involved in the Trail, the remainder operated in the Trail region. Of the seafood companies, the non-retail companies estimated they had

less than 500 visitors per year, and the one retail company had more than 10,000 visitors per year. Companies (including processors) that considered their business an attraction had from 100 to more than 10,000 visitors per year. Restaurants reported up to 10,000 visitors per year, and tour providers reported between 100 and 5,000 visitors per year.

Seafood companies that were involved solely in harvest and processing of seafood had more difficulty being involved as much as retailers in providing products and services to tourists. For example, one larger processor, interested in supporting the Trail development, had set up an interpretive area in their plant for tours (once per week).

However, they planned to discontinue the tours because the space had to be reprioritized as a worker changing area to meet health and safety regulations.

Some entrepreneurial tour companies and backpacker accommodations were working in partnership with marine farmers to provide unique seafood experiences (mussel harvest and cooking as part of a boat tour or kayak trip) for visitors. These experiences were initiated by these companies and were noted as their most popular tour packages. However, these partnerships depended on either personal experience with the seafood industry (former employee) or personal relationships between long time community members. One seafood company marketing expert suggested that these types of relationships will grow through word of mouth as success and demand continues.

The existence of multiple businesses that were not currently part of the Trail but were

developing interactive seafood experiences for tourists was a good indicator that entrepreneurs have positive attitudes about developing seafood and tourism partnerships. However, eco-tourism companies were focused more on the preservation of natural and ecological values of coast and negative aspects of marine farm expansion. Therefore, building partnerships between seafood and eco-tourism businesses will be much more challenging.

## Potential for marketing and education

Interview responses regarding the strengths, weaknesses, opportunities and challenges related to the Trail provided insight on the Trail's potential for impacting competitiveness of seafood exports and tourism and for enhancing education. The most common responses focused on three

major themes – 1) the relevance of the Trail to the region, 2) the value of the Trail as a marketing tool and 3) the value of the Trail for building cooperative business and outreach partnerships.

Businesses were very supportive of the Trail concept, with a majority of businesses remarking that the Trail provides a themed, marine-based touring opportunity for the independent travellers that are common in the region. There were several recommendations about improving the brochure content including integrating local Maori traditions, diversifying seafood products and marine-based activities and providing information on nutrition, local coastal ecology and marine farming techniques.

Businesses easily recognised the Trail as a marketing tool, but also highlighted priorities for expanding the marketing potential. Suggestions included improved market research, commercialisation of the Trail,





creation of an associated outreach and trip planning website, recognizing the importance of word-of-mouth relationships between residents and tourists and taking advantage of tourism as means to increase seafood brand recognition overseas. One respondent commented:

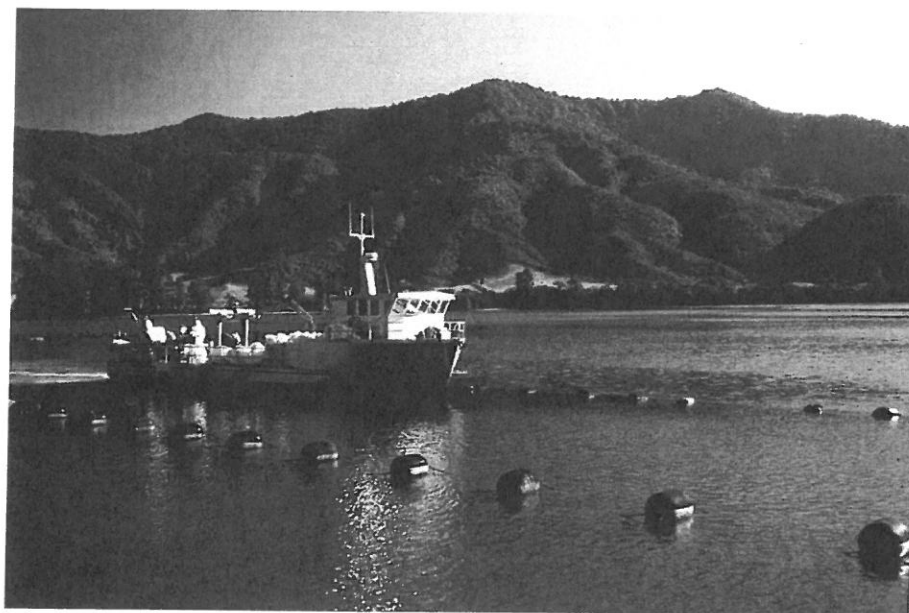
If we have visitors who come here to Marlborough and who get a hold of the brochure and visit any of these places, I would hope that they go home and if they see New Zealand Greenshell mussels on a menu in a restaurant or in a supermarket, that might encourage them to buy them.

In addition, businesses mentioned that the Trail would help the region target specific tourist markets interested in seafood and the marine environment and provide a focus for product development and new experiences to complement the wine cluster in the area. Businesses also suggested integrating the Trail into international destination marketing, with seafood producer cooperation, as a means to promote New Zealand to international visitors.

Businesses mentioned several other positive opportunities for cooperation linked to the Trail. They believed the Trail could facilitate shared learning between businesses,

## Top of the South Aquaculture and Seafood Trail

The MFA developed and published the Trail brochure in 2005 with the purpose of upholding the positive image of aquaculture among residents and tourists in the region. Another objective was to strengthen the collaboration between tourism and fisheries stakeholders in promoting the region as a seafood destination. From Kaikoura to Takaka, the 350km trail links 21 tourism related businesses that are associated with the seafood, mostly in Blenheim, Picton, Havelock, and Nelson. These businesses include restaurants, accommodation, mussel farms, other fresh sea food suppliers, and tour providers. Approximately 71 per cent of New Zealand's Greenshell mussels, 75 per cent of King Salmon, and 6 per cent of the Pacific Oysters are grown in the Trail area.



particularly toward a greater understanding of marine farming and production. In addition, the Trail network could assist in supporting a cluster of seafood friendly companies that would engage in innovative product development and diversification. They suggested that this collaboration would also enable marketing in the shoulder season (off-peak travel periods), particularly through local events such as the Blessing of the Fleet or the Havelock Mussel Festival.

While businesses identified the Trail as an important regional networking innovation for catalyzing new efforts, they also perceived weaknesses in networking, planning and coordinating the two sectors. Although travelling to the coast to eat fresh seafood is often universally considered a highlight of the trip, businesses indicated that tourism management organizations typically do not highlight the local seafood producers. This pattern is not unique to the Nelson/ Marlborough area or New Zealand. Evidence of scattered linkages between tourism and the local seafood processors in the region mirrored what has occurred in many coastal communities around the world. That is, the development of seafood and tourism linkages has been led by local business entrepreneurs rather than tourism development agencies. In addition, sustainable seafood initiatives have begun to stimulate coastal businesses to focus more on local products.

Researchers noted that businesses could not quantify the benefits of their investment in seafood and tourism linkages. This problem was partly because these efforts were one of several entrepreneurial strategies. As a result, evaluation of economic impacts is

challenging. Assessment of tourist demand and willingness to pay for local seafood products and experiences in the area would be valuable to strategic planning and impact analysis for the Trail. In addition, if the Trail is used to expand educational outreach on marine farming, surveying residents and tourists will be important to evaluating any attitudinal changes.

## Conclusions

Although Nelson-Marlborough region has been marketed worldwide as a wine destination and mecca for outdoor recreation, the idea of promoting locally caught seafood as a significant attribute of the region has been surprisingly recent. Since most New Zealand seafood is processed for export, cooperation between the seafood industry and tourism sectors where seafood is harvested may not seem important for competing on the global market. However, businesses participating in this study recognised that promoting locally caught seafood through 'value-added' tourism products takes advantage of place-based branding and experiences to enhance competitiveness of New Zealand seafood and tourism products with overseas markets. Businesses also recognised that this cooperation may be very important to building shared knowledge and community level acceptance of marine farms and tourism in the coastal zone. The results also suggest that engaging tourism management organizations in collaboration with local producers will depend on strong leadership from the seafood industry and the proven success of local cooperative efforts.