

**THE ROLE OF KEY STAKEHOLDERS IN SUSTAINABLE TOURISM DEVELOPMENT:
THE CASE STUDY OF NELSON/MARLBOROUGH/GOLDEN BAY IN NEW ZEALAND.**

ULRIKE SASSENBERG

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PRIMARY SUPERVISOR: DR JOHN HULL

SECONDARY SUPERVISOR: LAURA JODICE

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ATTESTATION OF AUTHORSHIP

“I hereby declare that this submission is my own work and that, to the best of my knowledge and belief, it contains no material previously published or written by another person (except where explicitly defined in the acknowledgements), nor material which to a substantial extent has been submitted for the award of any other degree or diploma of a university or other institution of higher learning.”

Ulrike Sassenberg

ETHICS APPROVAL

As this thesis used surveys and interviews that included human participants, ethical approval was required from AUT Ethics Committee (AUTEC). Approval was received on 10th March 2008 with Ethics Application Number 08/42.

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ACRONYMS

AMA	Aquaculture Management Area
ATTTO	Aviation Tourism and Travel Training Organisation
CO	Council Organisation
CoREs	Centres of Research Excellence
CSO	Commercial Stakeholder Organisation
DMO	Destination Management Organisation
DoC	Department of Conservation
GDP	Gross Domestic Product
i-SITE	The NZ Visitor Information Network
MFA	Marine Farming Association
MFish	Ministry of Fisheries (Te Tautiaki i nga tini a Tangaroa)
MRTO	Māori Regional Tourism Organisation
NGO	Non-Governmental Organisation
NIWA	National Institute of Water & Atmospheric Research
NZ	New Zealand
NZCC	New Zealand Clearwater Crayfish (Koura) Ltd
NZTRI	New Zealand Tourism Research Institute
OECD	Organisation for Economic Co-Operation and Development
R&D	Research and Development
ROI	Return on Investment
RS&T	Research, Science and Technology
R&T	Research and Technology
RTO	Regional Tourism Organisation
SeaFic	Seafood Industry Council
SIT	Special Interest Tourism
SME	Small and Medium Enterprises
SWOT	SWOT Analysis – S trengths, W eaknesses, O pportunities, T hreats
TEP	Tourism Eyre Peninsula

ABSTRACT

Contemporary tourism planning recognises that an integrated and sustainable development approach includes the participation of local communities and residents. Success depends on community level capacity for innovation and leadership which are important variables for the creation and implementation of new ideas as part of the development process.

The main aim of this research is to determine the capacity of stakeholders to support integration of tourism and aquaculture through development of a themed seafood tourism trail in the Nelson/Marlborough/Golden Bay region of New Zealand as a means to promote sustainable tourism.

In 2005 the Marine Farming Association developed and published the “Top of the South Aquaculture and Seafood Trail” as a brochure for tourists to promote a positive image of aquaculture in the region. The Trail integrates local tourism providers, restaurants, accommodation, seafood retail, as well as harvesting and processing businesses (mussel farms) as part of a themed driving route linking several peripheral communities. Themed driving routes are an innovative means for providing destinations with the opportunity to bring tourists and associated economic outcomes to remote locations. There is strong economic dependence on aquaculture and tourism in the region with both industries generating a combined NZ\$402 million annually in the Nelson Region alone.

The research involved interviews with 22 local stakeholders regarding their perceptions about strengths, weaknesses, threats and opportunities associated with the Trail as part of a mixed method, case study approach.

The results show that tourism and aquaculture in the region are well developed, but that there are weaknesses in networking and collaboration within and among industrial sectors. In addition, there are differing perceptions of the aquaculture and tourism industries. The role of the university has been important in building community capacity for research and strategic planning linked to the Trail.

In many cases tourism is used by governments as a key tool for regional development (Forstner, 2004). New global *best practice* indicates that more planning, increasing local control, sustainable development, the application of new technologies and market segmentation have positive effects on the destination's development in the long term (Milne, 1995; Poon, 1994).

Community-controlled tourism requires that stakeholders have sufficient understanding and knowledge about the aspects of tourism that contribute positively to its sustainable development (Okech, 2006). Sustainable tourism development is dependent on balancing the social, economic and environmental components of the community (Richards & Hall, 2000). Furthermore, networking among businesses in the community is important to create positive opportunities through economies of scale, education and training, access to marketing expertise, advanced technology and economic advantages that support innovation (Morrison, 1998).

Innovation in the form of new ideas often leads to changes in production, service development, and supply at peripheral destinations (Aarsaether, 2005). These changes result in direct and indirect benefits essential to integrated, sustainable forms of tourism and the adoption of the innovation by locals (Rogers, 2003).

The challenge facing peripheral destinations is that, geographically, they are located outside the world's main centres of production and population (Brown & Hall, 2000b). Peripheral tourism refers to tourism in remote areas (Brown & Hall, 2000b) and these destinations are welcoming an increasing number of visitors (Brown & Hall, 2000b) to 'the pleasure periphery' (Turner & Ash, 1975). However, many policymakers point out that peripheral destinations lack innovation, and are dependent on traditional industries. Internal economic linkages are also acknowledged as often weaker than in the main centres (Brown & Hall, 2000b; Hall & Boyd, 2005).

The New Zealand coast is dominated by peripheral communities that are of high interest to tourists seeking marine related experiences. The Nelson/Marlborough/Golden Bay coastal region of New Zealand has undergone simultaneous rapid expansion of aquaculture and seafood tourism in the last 30 years, both of which are increasingly important to the regional economy. As such, the region offers an interesting case for exploring tourism development that integrates these two sectors.

1.1 Aims and Objectives

The main aim of this research is to determine the capacity of stakeholders to support integration of tourism and aquaculture through development of a seafood trail linking peripheral communities in the Nelson/Marlborough/Golden Bay region of New Zealand. This will be accomplished through a case study approach that seeks to 1) understand how the economic, social and environmental characteristics of the region create the conditions for a seafood trail and 2) why local stakeholders are adopting the seafood trail as an innovative strategy for sustainable tourism. These research questions will be answered by meeting the following objectives:

- to inventory the tourism and aquaculture resources of the Nelson/Marlborough/Golden Bay region.
- to evaluate stakeholder perceptions of the tourism industry and the potential for links between tourism and aquaculture in developing a seafood tourism destination.
- to evaluate the role of a themed seafood and aquaculture trail in a tourism destination dependent on marine resources and seafood harvest.
- to evaluate the seafood trail in promoting more sustainable forms of tourism development.

The research is designed to inform strategic planning/management decisions at the destination aimed at strengthening innovation and internal economic linkages between the aquaculture and seafood tourism sectors, two rapidly expanding sectors in the region. In addition, the case study will provide a

learning example for comparable peripheral destinations facing similar challenges to destination development.

1.2 Background

The tourism industry is increasingly important to the economy of New Zealand in terms of services, goods and employment (Ministry of Tourism, 2009b). For the year ending May 2009, New Zealand had 2,418 million international visitor arrivals with expenditure until March estimated at NZ\$ 6,1 billion. International visitor arrivals are forecast to increase by 3.3% annually to 2014 (Ministry of Tourism, 2009a).

The aquaculture industry is currently worth NZ\$300 million and is forecasting growth to \$1 billion in export revenue by the year 2025 (Te Puni Kokiri - Ministry of Maori Development, 2007). As the capital of the New Zealand aquaculture industry, a significant proportion of the industry's investment, production, and intellectual property resides in the Nelson/Marlborough/Golden Bay region. That presents an array of opportunities, especially in the supply of infrastructural products and services and the commercialisation of intellectual property.

1.3 Content of Study

Chapter two is a literature review of theory and concepts that address peripheral tourism in a context of destination management and product development relevant to a seafood trail that links the aquaculture and seafood tourism sectors. Collaboration and innovation theory are also discussed to help understand the role of stakeholders, their responsibilities, limitations and challenges in promoting or participating in a seafood trail.

Chapter three provides an overview of the research design and techniques with a specific focus on the mixed method and instruments used as part of a case study approach. Data collection methods are also described, including a justification of their application. A clarification of ethical issues is also summarised.

Chapter four provides a summary of the organisational and institutional environment in the case study region at the 'Top of the South Island' of New Zealand. General information about New Zealand's political structure and authorities relevant to tourism and seafood in the region is provided. Key stakeholders and their general roles as leaders in the tourism and aquaculture industries are examined as a basis for evaluating capacity for collaborative linkages between the tourism and aquaculture industry.

Chapter five summarises the primary and secondary data. Based on the primary data, significant features of the case study site --"the context"-- are discussed in more depth by looking at stakeholders' opinions to local cooperation, options to access local marine products, economic development and the current destination image. Further stakeholders' perceptions of the Aquaculture and Seafood Trail --"the product"-- will be outlined by analysing stakeholders' opinions about the concept and awareness of the Trail, the role of cooperation, and the economic benefits with respect to regional impact and resulting opportunities. The data discussion in this chapter focuses on identifying recommendations for further development of the Aquaculture and Seafood Trail in the Top of the South Island.

Chapter six presents a summary of key research findings and a critical examination of whether the initial objectives and aims were met. Finally, recommendations for further development and future research are addressed.

Several tourism and marketing concepts and research themes are relevant to the peripheral regions encompassed by the Top of the South case study area. Furthermore, the research focus on integration of tourism and seafood industry sectors requires consideration of tourism theory that is relevant to coastal and marine resource management in the evaluation of the relationships between tourism and seafood harvest in the coastal zone. Therefore, this chapter evaluates destination development in the context of peripheral regions and sustainability.

The general characteristics of peripheral regions are first identified and theory important to effective sustainable tourism strategies is reviewed. The importance of collaboration on regional, national and international levels is also considered, because collaboration is integral in building community capacity to support sustainable development as well as cross-sectoral innovation.

Theory on special interest tourism is then reviewed as its demand provides an opportunity for peripheral regions/areas/communities to develop these types of local products and experiences. Because the focus of the Top of the South case study is based on unique and authentic culinary experiences linked to aquaculture and seafood, a review of these theories and concepts is included.

Finally, the role of innovation related to tourism in peripheral regions is discussed relevant to the role of key stakeholders in diffusion of innovation. Cultural/social/ economic conditions important to the success of the innovation is considered. Global case study examples similar to the case study site and the innovation construct for tourism are also analysed.

2.1 Global Tourism Trends

Worldwide the travel and tourism industry is one of the most important sectors of the global economy (World Travel & Tourism Council, n.d.-b). From 2004 to 2007, the average Gross Domestic Product (GDP) growth of the travel and

tourism economy was 3.6%. In 2008, the industry had its weakest performance since 2003, with 1% GDP growth. Up until 2010, the industry is expected to expand slowly, but over the long-term, the travel and tourism industry remains one of the world's fastest growing sectors (World Travel & Tourism Council, n.d.-a). In 1950 international holidays were taken by 25 million people worldwide. Yeoman (2008b) predicts that there will be 1.9 billion international arrivals in 2030.

During the last decades of globalisation, possibilities for travel increased due to improvements in transportation, increased security, the growth in the supply of facilities, and the increased affluence of people in developed countries. These changes in the tourism supply chain have resulted in the increasing availability of flexible and customised travel opportunities compared to previous mass tourism that was standardised and rigidly packaged. Trends point to a growing number of free and independent travellers who are looking for the adventure of undiscovered destinations (Buckley, 1999).

According to Yeoman (2008b, p. 195) "today's tourist ... is searching for new experiences, is concerned about the environment, is interested in taking part in a health/well being lifestyle and wants to experience the local culture ...". Furthermore Boniface and Cooper (2005, p. 31) characterise the behaviour of the 'new tourist' as follows:

- critical and discerning
- experienced, able to compare destinations and products
- know what they want in terms of quality, service and value for money
- flexible and spontaneous in travel arrangements
- have considerable consumer and technology skills
- motivated by wanderlust
- travel out of curiosity and cultural reasons
- have concern for the planet and values encouraging the ethical consumption of tourism.

The travel patterns of the new tourist are causing a growing shift towards rural areas as members of urbanised societies increasingly seek rest, relaxation, and

recreational opportunities in the *pleasure periphery* (Turner & Ash, 1975). The worldwide homogenisation of cities is also resulting in the demand for local authentic experiences (Bramwell, 2004; Buckley, 1999).

2.2 Peripheral Regions

Today peripheral regions offer the traveller opportunities to experience difference, peace, and exoticism and can promote tourism based on nostalgia, authenticity and 'untouched' nature (Caalders, 2000; Hjalager et al., 2008). The natural beauty and a difficulty of access are also perceived as attractions motivating travel to these areas (Brown & Hall, 2000a). Given that people's lives are increasingly concentrated in large cities, the characteristics of peripherality are important considerations for tourism development (Brown & Hall, 2000b; Richard Florida, 2008).

Peripherality is defined by the neighbouring centre of power. Peripheral regions are located in geographical isolation, separated from markets by poor access, dominated by small micro-firms with a lack of influence and power, and a low level of expert knowledge and training possibilities. Further, remote areas have changed little in recent years, relying on traditional industries and often suffering from out-migration. The backwardness of peripherality is mainly based on poor information flows and lack of innovation (Brown & Hall, 2000a).

The fact that there are limited development opportunities in these regions has resulted in policymakers turning to the tourism industry as an attractive instrument for creating jobs and economic benefits on the one hand, and for protecting heritage and the environment on the other. Thus it is popular for rural areas to use tourism development as a means to address issues of depopulation, decline of natural resource-dependent industries (e.g. agriculture) and to promote economic diversification (Butler, Hall, & Jenkins, 1998). The large investment of public funds in marketing and promoting the regions indicates the importance of tourism. These funds are mainly invested to improve touristic attractiveness (Ruhanen, 2007).

To become attractive to the visitor who is looking for activity, adventure and involvement, a destination has to offer education, room for interpretation and overall an authentic and natural experience (Boniface & Cooper, 2005). Authenticity is often related to objects that represent the genuineness of rituals, artefacts, performances and food. The available objects and associated programming identify the level of perceived authenticity of a tourist experience (Pichford, 2008). The challenge is to make the authenticity of a place accessible to tourists (MacCannell, 1973).

However, peripheral areas can have trouble attracting tourists, particularly when transportation linkages are poor, marketing or destination management is weak, tourism infrastructure is lacking and when the low level of entrepreneurship and capital prevent business formations (Botterill et al., 2000). Furthermore peripheral communities are often not aware of the power offered by the Internet and are not organised to make use of it (Mair, Reid, & George, 2005). Local leaders have to understand the value of the regional backwardness and identify tourism as an opportunity for economic diversification (Richards & Hall, 2000).

2.3 Sustainable Tourism Development

One of the main positive effects of tourism is the increased job opportunities and the development of rural communities. Wherever tourists go, they need accommodation, food and want to enjoy the local environment, regardless of their travel motivations (Giaoutzi & Nijkamp, 2006). However, for a destination to benefit from the tourism industry's positive economic impact, the negative effects of the increasing numbers of visitors must be minimised.

The World Tourism Organization (2004) reports that tourism, besides providing positive economic impacts, can also lead to overcrowding and modernisation. This statement is supported by several assessments which point out many negative consequences caused by tourism development such as access limitation to land for traditional activities (Vail & Hultkrantz, 2000), reduced economic returns from tourism for locals (Kiss, 2004), disruption of traditional subsistence and other activities (Abakerli, 2001), harm to cultural and natural

heritage (Briassoulis, 2002), and negative impacts on social structure and local culture. Environmentally, local ecosystems, especially wetlands, coral reefs and fragile reserves are increasingly threatened when exposed to mass tourism (Singh & Singh, 1999).

Mass tourism also often strongly influences facility and infrastructure development in a popular destination. Development of new hotels to accommodate high levels of tourists can be stressful on local utilities unless strategies include expansion of the basic infrastructure, and can in turn alter local cultural and social systems and change the employment profile (e.g. due to more service-oriented industry). In this way, as tourism expands to peripheral regions, increasing attention is paid to sustainable tourism development, with the focus on limiting impacts on cultural and natural aspects while assuring appropriate infrastructure (e.g. sewage treatment and water supply, energy demand) (Hall & Boyd, 2005).

However, the increasing demand for nature-based tourism and ecotourism shifts the environmental impact of tourism to ever more fragile and primitive destinations. Hence the tourists' activities (and associated impacts) become more relevant than facility development (Leung, Marion, & Farrell, 2001).

The World Commission on Environment and Development (WCED) defines sustainable development as "development that meets the needs of the present without compromising the ability of future generations to meet their own needs" (World Commission on Environment and Development, 1987, p. 8). The challenge faced by the tourism industry is to take advantage of the benefits and control the negative impacts on people, destinations and countries (Edgell, 2006).

Academic concern about the carrying capacity of tourism destinations started in the late 1960s and evolved into research and discussion about sustainability over the subsequent three decades. This concept implies that the future of tourism and the sustainability of a destination's environment are dependent on the adequate understanding and management of a region's limits to growth (Saarinen, 2006).

The roots of ecologically sustainable development were created at the United Nations Conference in 1972. Eight years later the International Union for the Conservation of Nature (IUCN), the United Nations Environment Program (UNEP) and the World Wide Fund for Nature (WWF) produced the *World Conservation Strategy* with the subtitle *Living Resource Conservation for Sustainable Development* as an approach to ensure future social and economic development of our earth (Bushell, 2001). Since the 1980s the increasing demand for sustainable practices has been driven by growing environmental sensitivity, especially in Western societies (Saarinen, 2006).

In his review of sustainable tourism definitions, Butler (1999) states that the development of the term sustainable tourism has led to confusion. He points out that sustainable tourism must be distinguished from tourism development based on the principles of sustainable economic development. Also Mitchell (2001) notes that the increasing literature on sustainability and tourism is evidence of the challenge of defining sustainability and applying it to the tourism industry. He says that “sustainable tourism generally implies a balanced mix of sustaining local economies, local cultures and local environments” (Mitchell, 2001, p. 138).

However, the nature of the challenges remains the same, and eventually the strategies of dealing with tourism and its limits to growth are critical (Saarinen, 2006). Therefore, community economic development strategies often include tourism development planning in an effort to maximise positive impacts and minimise the negative impacts of the industry.

Sustainable tourism development is based on the sustainability of communities (Richards & Hall, 2000) because in many cases the primary resource of tourism are communities themselves (Hjalager et al., 2008). The challenge is to balance the regional economic development and the conservation of a destination’s natural and cultural heritage resources (Hinch & Higham, 2004). These resources are often the basis for building a sustainable industry in remote regions (Brown & Hall, 2000a).

Controlling the significant effects of tourism and achieving both economic and environmental sustainability by balancing growth and development is very complex. It is especially challenging for the tourism industry in rural communities dominated by local small and medium enterprises (SME) (Ioannides, 2001; Singh & Singh, 1999; Stuart, Pearce, & Weaver, 2005). That is why, according to Botterill et al. (2000), development in peripheries is often driven by the government more than the global centres of industry and population.

Destination Management Organisations (DMOs) have one of the most important roles in peripheral destination development. These tourism organisations often put emphasis on both destination marketing and destination development. Timur and Getz (2008) also point out that the same issues in different destinations are not necessarily managed by the same types of key stakeholders.

Destination planners and managers focus on strategic planning initiatives that maximise local control of the tourism dollar to keep their share of the revenue (Ruhanen, 2007). Timur and Getz (2008) indicate that the individuality of each destination leads to unique sustainable development solutions.

There is an increasing need for innovative development models, offering an approach to rural development that unites the preservation of identity with dynamic development (Caalders, 2000). New global best practice indicates that more planning, increasing local control, sustainable development, the application of new technologies and market segmentation have positive effects on the destination's development in the long term (Milne, 1995; Poon, 1994). This is often achieved through collaborative efforts between stakeholders.

2.4 Collaboration

Communities share and manage resources in order to achieve a common goal in terms of quality of life. However, it is important to have a joint vision to guide physical, cultural and attitudinal changes in the future (Bushell, 2001). The importance of collaboration has risen substantially with the growing challenges

of environmental issues and globalisation, particularly in the coastal regions where integrated coastal management strategies are important to sustainability of marine ecosystems and coastal carrying capacity. Buhalis and Costa (2006) point out that decision-makers, managers, academics, researchers, politicians and planners are responsible for preparing the tourism industry for the various changes that are shaping the sector in the future. Cooperation and participation of the community, relevant government agencies, and industry stakeholders are necessary to achieve an agreement on planning directions and common goals (Ruhanen, 2007).

Destination planning is influenced by the contribution of multiple stakeholders who have different legitimate interests in the region's future development (K. Simpson, 2001). According to Lebe and Milfelner (2006), stakeholders in a destination have to realise that networking and cooperation on various levels is essential to achieve attention from international travellers.

However, due to the unequal distribution of power, and the uneven flow of information, there is often not one single community participation framework (Richards & Hall, 2000). Therefore, understanding community involvement and local cooperation is essential for tourism planning development in rural areas (Mitchel & Hall, 2005).

The involvement of communities in tourism development is not understood as a matter of course yet. Moscardo (2006) indicates, that locals are often excluded from many decisions because they are seen as lacking the knowledge and skills to participate in tourism. However, active participation by the community in the tourism development policies is increasingly accepted as a solution to achieving implementation of sustainable strategies (McCool & Moisey, 2001; Mitchell, 2001).

Achieving successful community controlled tourism depends on local businesses and stakeholders having sufficient understanding and knowledge of the aspects of tourism to contribute positively to its sustainable development (Okech, 2006). The residents' preferences and perceptions have to be integrated in the tourism development policies to be effective. The private, public, and non-profit

sectors hold active roles and are responsible for the well-being of the community, especially in peripheral destinations (Aarsaether, 2005).

In general, collaboration make sense to stakeholders when there is a win-win potential for two or more destination players, and when there is a need for control of unique resources in which two or more destination players are dependent (Fyall & Garrod, 2005). Singh & Singh (1999) identify cooperative tourism as the joint performance and share of responsibility for policy decisions by all parties involved in the tourism system. They also argue that coordination and sustainable development is most effective when it includes central, state, and local governments. Similar principles apply to collaborative management of coastal and marine resources (Degnbol, Wilson, Grolin, & Jensen, 2003).

Furthermore, partnerships are essential for securing project funding from public funding agencies, e.g. in the European Union. Fyall and Garrod (2005, p. 289 f.) point out a number of benefits and drawbacks related to collaboration of stakeholders in a destination, as listed in Table 2.1.

Table 2. 1 Advantages and Disadvantages of Destination Collaboration

Advantages	Disadvantages
<ul style="list-style-type: none"> • Reduction in risk through strength in numbers and interconnectedness within and across destinations 	<ul style="list-style-type: none"> • General mistrust and suspicion among collaborating partners due to governance or structures that are inappropriate for moving the shared project forward
<ul style="list-style-type: none"> • Efficient and effective exchange of resources for perceived mutual benefit 	<ul style="list-style-type: none"> • Inability of various sectors within the destination to work together due to excuses of a political, economic or even interpersonal nature
<ul style="list-style-type: none"> • The generation of increased visitor flows and positive economic impacts 	<ul style="list-style-type: none"> • Instances where particular stakeholders fail to recognise the real value of collaboration and remain closed to the benefits of working together
<ul style="list-style-type: none"> • The potential for collaborative initiatives to counter the threat of channel intermediary powers 	<ul style="list-style-type: none"> • The frequent disinterest in collaboration from 'honey-pot' attractions, where the need to work more closely together is discounted due to their own individual success in the marketplace
<ul style="list-style-type: none"> • In peripheral locations, collaboration serving as a significant vehicle to broaden the destination domain 	<ul style="list-style-type: none"> • Competition between municipal authorities that administer separate geographical regions within a recognised destination resulting in inertia
<ul style="list-style-type: none"> • The ability to counter greater standardisation in the industry through the use of innovative collaborative marketing campaigns 	

<ul style="list-style-type: none"> • The potential to develop destination-wide reservation systems and two-way dialogue with customers through technological collaboration, whereby the emerging technologies can facilitate relationship-building and customer relationship-management programmes 	
<ul style="list-style-type: none"> • Further collaboration on the Internet, so affording DMOs the ability to reach large numbers of consumers, to transmit information and offer products at a relatively low cost, to provide complete and more reliable information, to make client reservations quickly and efficiently and to reduce the costs associated with producing and distributing printed materials 	

The advantages listed above point out that a collective approach, between the public and private sectors, can support more effective strategic planning. Furthermore, interdependency leads to more purposeful and target orientated market planning (Fyall & Garrod, 2005) and product development. The number and kind of parties involved, the level of leadership and the return of the outcome are significant factors that influence the success of collaboration.

2.4.1 Special Interest Tourism

Special interest tourism (SIT) is defined by Derrett (2001, p. 3) as “the provision of customised leisure and recreational experiences driven by the specific expressed interests of individuals and groups.” He describes SIT-tourists as travelling for a particular reason, driven by special interests or needs to get in touch with specific products or services. One of the main motivations of SIT-tourists is to experience a sense of the place through interaction with locals.

Products that attract SIT-tourists include more of an experience than an observation of lifestyles and landscapes. Developed for niche markets, these experiences include customised packages involving the tourists interested in particular bodies of knowledge or communities. Examples of SIT are: Heritage, Rural, Urban, Educational, Health, Environmental, Agriculture, Wine and Food, Cruise, Event, Sex and Senior (Douglas, Douglas, & Derrett, 2001).

SIT visitors often seek attractions and services that are managed by governments at the national, state and regional level such as national parks,

marine reserves, and museums. Especially for SIT, collaboration of tourism managers and specialists is necessary to facilitate packages, improve access, and create an integrated and consistent marketing concept, and prepare well-trained staff to interact with the tourists (Derrett, 2001).

Providing SIT activities supports the development of niche markets, differentiates a destination from competitors and thus creates experiential opportunities in a destination (Derrett, 2001). Most business ideas are based on the personal experience and special interest of the particular entrepreneur who has identified a potential business opportunity. These opportunities often incorporate new ideas and innovation within the industry. Two good examples in the New Zealand tourism industry of experiential businesses are sheep shearing exhibitions, or a farm stay where overnight guests actually engage in the activities of a working farm (Hing, 2001). In addition festivals and events are organised by destinations themselves to give locals and visitors the opportunity to get a feeling of the community and its character. Local wine and food tours are two examples of attractions effective in entertaining visitors through a display of authentic activities that result in economic gain (Derrett, 2001; Hall, 2005). These experiences require partnership between destination promoters and the local area farmers and food producers.

2.4.2 Culinary Tourism

Culinary tourism is a form of SIT. Every tourist requires food and drink and dining out is one of the tourists' main activities (Yeoman, 2008b). Certain society groups set high value on unique food and drinks. Many of today's tourists are wealthier, better educated, and experienced travellers, concerned about the environment and their own health and have a higher life expectation (Yeoman, 2008b). With the rise of the leisure class (R. Florida, 2002), food and cooking has become more of a hobby and a lifestyle (Yeoman, 2008a).

Hall and Mitchell (2001, p. 308) define food tourism as the "visitation to primary and secondary food producers, food festivals, restaurants and specific locations ... it is the desire to experience a particular type of food or the produce of a specific region...." Further, Hall and Mitchell (2001) point out that wine and

food tourism attracts people who want to experience a certain type of food, a particular product of the region, or the meal of a specific chef. As those people regard their interest as 'serious leisure' (Stebbins, 1982) this form of SIT can be regarded as cuisine or gourmet tourism (Hall & Mitchell, 2001).

Food is also an important element of cultural and heritage tourism and can be used as a means to differentiate a destination (T. Simpson, 2008). For some travellers, food is the key reason to visit a specific region. This also explains why food is often an important component in tourism marketing and contributes to the image of a country/ destination overseas (Hall & Mitchell, 2001).

Authenticity is an important component of food tourism because local food is integral to offering an authentic and high-quality experience to tourists (Yeoman, 2008b). The demand for this SIT provides an opportunity for peripheral regions and communities to benefit by promoting their own local food products. Taking advantage of the increased awareness of food as a cultural experience also gives particular destinations the opportunity to showcase their authentic character (Hall, 2005). However, destinations themselves have to define what they are about and whom they are going to attract (Yeoman, 2008a).

The relationship between food and heritage or cultural tourism creates numerous opportunities for destination development. Rural areas are increasingly identifying themselves with their agricultural products such as promoting wine and food (Hall, 2005) and at the same time, many operators and marketing agents also promote authenticity as a means to attract tourists. The heritage of rural areas is often linked to food as a means to 'recover the authentic' and 'refashion nature, and hence reality itself' (Hughes, 1995, p. 798). For example Scotland's marketing strategy, 'The Taste of Scotland', demonstrates that local traditions for attracting international tourists are especially relevant to peripheral regions (Hughes, 1995).

Many peripheral regions have shown that their local economy is profiting from tourists buying their food and beverages (Kim, Eves, & Scarles, 2009). The value of Scottish tourism for example is expected to increase by 50% during the next

six years, largely driven by its restaurant and food industry (Yeoman, 2008b). Experiencing food (and wine) first hand and getting in touch with the producer is a main attraction for visitors and creates an essential benefit, especially for smaller businesses (Hall & Mitchell, 2001). Additionally, food is viewed by the visitor as adding value to travel destinations by linking local landscape, culture and cuisine. Visitors interacting with food producers add value by consuming a tourist experience rather than only something to eat (Hjalager & Richards, 2002). Larger producers that also export their product to the tourists' home country can capitalise on this phenomenon as a marketing strategy. Consequently, food tourism affects the whole food chain from production to retail (Deale, Norman, & Jodice, 2008).

Collaboration between food and tourism makes sense because these industries have several things in common such as the simultaneous development of industrialisation and mass production that are resulting in fast food and mass tourism (Hjalager & Richards, 2002). These developments have had a significant impact on the survival of authentic local cuisine and parallel concern for sustainable tourism development and sustainable food production. The export of local food to the visitors' place of origin supports biodiversity and the conservation of food, reinforces local food economies, improves agriculture and food production, and sustains local identity (Hall, Mitchell, & Sharples, 2003).

Kim, Eves and Scarles (2009, p. 429) identified nine motivational factors explaining tourists' consumption of local food: exciting experience, escape from routine, health and concern, learning knowledge, authentic experience, togetherness, prestige, sensory appeal and physical environment. Additionally demographic and physiological factors play a role, as their research suggested that older and well-educated travellers consider local food as "one of the unique and original attractions during a holiday" and not just as a way of satisfying hunger (Kim et al., 2009, p. 430).

Everett (2008) defines food tourism as a 'post-modern' tourism experience and states that food in a context of local culture assists in characterising a particular place and its identity. She found that multisensory activities, such as eating fish

by the sea, give tourists the feeling of really experiencing a place while viewing windows (e.g. to kitchens) are a sanitised option without any olfactory sensation or social interaction, focused on the visual experience.

The Slow Food movement, was established in opposition to fast food in Italy in 1986 (Petrini & Padovani, 2006). This movement has promoted sustainable farming, heritage food products, local producers, and agricultural biodiversity. The movement also created opportunities for tourism. The Slow Food organisation assists in making visitors aware of regional food, cooking methods, the importance of the origin of food and the pleasure of enjoying cuisine (Petrini & Padovani, 2006). Today there are 100,000 members in more than 132 countries (Slow Food, n.d.).

As shown in Figure 2.1, Hall and Sharples (2003, p. 11) categorise food tourists into different segments based on their level of interest in food. They say that in general every kind of tourist has to eat. Rural and urban tourism includes visitors who are going to wine and food related occasions because it is something to do, but not because of their special interest in wine or food. The Culinary Tourist is moderately interested in wine and food and considers related events as a part of his or her lifestyle activities. Gastronomic Tourists are the few visitors who spend a huge amount of money for particular wine or food at a specific destination.

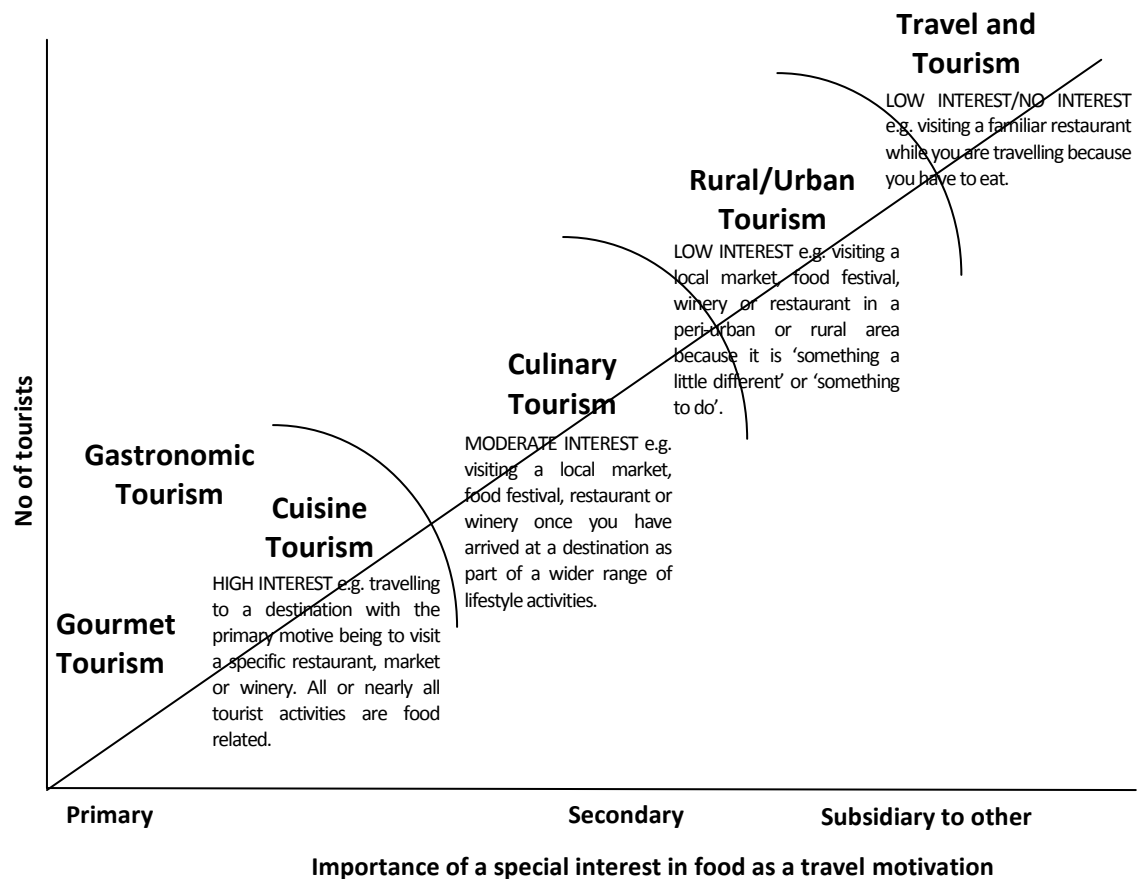


Figure 2. 1 Wine and Food Tourism as a Niche Tourism Product

The more important food is as a motivation for travel, the more an authentic experience is often required i.e. for gastronomic tourism. Authenticity with regard to seafood-based tourism depends on the presence or absence of fishing activities at the destination. Based on comparative analysis of four UK case studies, Brookfield, Gray and Hatchard (2005) distinguish between real and virtual fishing communities. Fisheries-dependent communities are defined as 'real', if they depend on the product, while 'virtual' fishing communities depend on fishing imagery and branding to attract tourists and create a niche market for fish products rather than on the actual presence of fishing operations. Using this dichotomy, Jodice and Norman (2007) explored differentiation between real and virtual seafood experiences in a survey of coastal and shrimp festival tourists in South Carolina, USA. They determined that the less knowledgeable the tourists are about the origin of the food, the less they differ in their opinion between real and virtual seafood experiences. In addition, the majority of visitors seemed to be more interested in the virtual experiences such as

festivals, cooking classes, travel guides, recipes, charter boat trips, and heritage museums/exhibitions than in interacting directly with the fishing industry (Jodice & Norman, 2007).

These results illustrate the growing importance of linking tourism and food for profit as part of the experience economy (Hjalager & Richards, 2002; Pine & Gilmore, 1999). The strong relationship of place, cuisine and visitor experience creates a lot of room for innovation and joint marketing synergies promoting a region by combining food and tourism. For example, festivals and events based on local food are used by rural and peripheral regions to derive commercial benefits such as media attention and increased international visitors (Rusher, 2003). An example of this is when national and regional tourism associations sponsor food and travel programmes on television (Hall & Mitchell, 2001) which highlight unique food experiences at destinations. Farmers' markets, increasingly used by rural areas to promote local foods to locals, can also attract visitors to the region (Hall et al., 2003).

Two examples of food-related tourism attractions in New Zealand help illustrate the relevance of these issues to the focus of the case in this study.

In 1993, New Zealand launched its marketing campaign 'New Zealand Way' which was further combined with 'Fresh-/ Taste-/ Experience the New Zealand Way'. This successful campaign associated wine, food and tourism with New Zealand and benefited various companies (ie, Air New Zealand) while capitalising on New Zealand's export success of wine to Canada (Hall & Mitchell, 2001).

The Bluff Oyster and Southland Seafood Festival is a yearly event taking place in the southern region of New Zealand's South Island. Originally a small community festival for local schools, it has now developed into a national and international event known as the Bluff Oyster and Southland Seafood Festival, representing the local industries and their products (Rusher, 2003).

Another common organisational structure often used for building partnerships between food and tourism in a destination is a *themed trail*. Summarising local attractions based on a theme creates a regional identity (Mielke, 2000). Hardy

(2003, p. 314) describes iconic touring routes as “opportunities to link regional communities together, form partnerships, encourage tourism development along commonly travelled routes, provide a more satisfactory tourism experience and maximise economic benefits to local business people by encouraging longer stays and greater spending in the region.” Trails create a feeling of cohesion in the areas through which they pass (Hardy, 2003).

Today food and beverage trails are used worldwide as a vehicle for promotion of tourism and for taking advantage of culinary interests of tourists. The majority of the existing trails are wine routes or trails (Yeoman, 2008a), which can be found in nearly any country that focuses on wine production (Hall, 2005).

Overall the themed trail-concept has emerged as a prominent example of tourism product development and process innovation to promote rural destinations. Themed trails provide a means to link peripheral communities, improve economic performance, and drive tourism innovation through collaboration of actors (e.g. such as economic and cultural institutions, associations and municipalities) (Meyer-Cech, 2005), in addition to strengthening external relations and marketing with new improved marketing methods.

A selection of non-seafood food trail websites in Australia, Europe, and America, collected as part of web-based research is shown in Table 2.2. A summary of purely wine trails has been waived due to the large number of trails.

Table 2. 2 Summary of Food Trails in Australia, Europe and USA

Region	Name	Source
Austria, Bregenzerwald	Bregenzerwald Cheese Route	(Holidays in Austria. The Official Travel Guide, 2009)
Austria, Gleisdorf	The Styrian Apple Route	(Holidays in Austria. The Official Travel Guide, 2009)
Total Austria 2		
Australia, Adelaide	Barossa Valley Food Trails	(South Barossa & South Australia, 2009)
Australia, Adelaide	The Adelaide Hills Food Trail	(Adelaide Hills & South Australia, 2009)
Australia, Barossa Valley	Butcher, Baker, Winemaker Trail	(South Barossa & South Australia, 2009)

Australia, Barossa Valley	Barossa Cheese & Wine Trail	(Barossa & Australia, 2009)
Australia, NSW	Cheese&Wine trail	(Tourism Australia, 2009)
Australia, Queensland	Sunshine Coast Food Trail	(Queensland Australia, 2009)
Australia, Queensland	The Coral Coast Food Trail	(Australian Tropical Foods, 2009)
Australia, Queensland	The Great Tropical Drive	(Tourism Tropical North Queensland, 2009)
Australia, Queensland	The Highlander Food Trail Tour	(Food Trail Tours, 2009)
Australia, Queensland	The Rainforest Food Trail	(Australian Tropical Foods, 2009)
Australia, Queensland	The Savannah Tablelands Food Trail	(Australian Tropical Foods, 2009)
Australia, Riverland	Riverland Wine and Food Trail	(Riverland Tourism, 2009)
Australia, Yarra Valley	Yarra Valley Regional Food Trail	(About Australia, 2009)
Total Australia 13		
Germany, Lower Saxony	The Niedersachsen Asparagus Route	(Tourismus Marketing Niedersachsen, 2009)
Germany, Schleswig-Holstein	Schleswig-Holstein Cheese Route	(German National Tourism Board, 2009)
Total Germany 2		
New Zealand, The Coromandel	The Coromandel, New Zealand, home-grown food trail	(The Coromandel, 2009)
New Zealand, Hawke's Bay	Hawke's Bay Food Trail,	(Food Hawkes Bay, 2009)
Total New Zealand 2		
USA, Alabama	Alabama Food & Wine Trail	(Sweet Home Alabama, 2009)
USA, Arizona	Arizona's Salsa Trail	(Graham County Tourism, 2009)
USA, California	Fresno County Fruit Trail	(Fresno County Office of Tourism, 2009)
USA, Connecticut	The Connecticut Food Trail	(Wittman Specialty Foods & Connecticut Food Association, 2008)
USA, Louisiana	Lousiana Culinary Trails Guide	(Louisiana Office of Tourism & Tarasco, 2009)
USA, North Carolina	NCBS Historic Barbecue Trail	(North Carolina Barbecue Society, 2009)
USA, Oakland	Oakland's Waterfront Food Trail	(Oakland Local, 2009)
USA, Pennsylvania	New Sweet Treats & Salty Eats Snack Food Trail	(York County Pennsylvania, 2009)
USA, Vermont	Vermont Farm & Food Trail	(Vermont Farm Trail, 2009)
USA, Vermont	Vermont Cheese Trail	(Vermont Cheese Council, 2009)
Total USA 10		

Nearly half of the food trails offer a variety of local products, fruits and vegetables, often combined with wine, beer or other beverage trails. Besides food trails that offer variety, there is also a certain number of specialised food

trails, which promote a single type of food such as the Cheese Trail in Austria or the Asparagus Route in Germany (Meyer-Cech, 2005).

These special themed routes assist and aid tourists in their tour decisions and preferences. Once a trail is working successfully in a country or an area, there seems to be a tendency to copy the idea (see number of trails in Australia, especially in Queensland). On a long-distance trail through large regions or countries such as Australia or the USA, businesses are not in direct competition but rather substitute for each other - a situation which is much more difficult in Europe's smaller regions. Additionally the existence of other tourist attractions (i.e. historic buildings) connected to a trail may explain why there are not so many food trails in Europe (Hardy, 2003).

Despite the fact that an enormous number of tourists visit coastal areas year after year, aquaculture and/or seafood trails that highlight farming and production of seafood as well as local restaurants, specialties and tourist-activities, are still rare. Intensive web-based research resulted in the identification of only a few aquaculture and/or seafood trails, listed in Table 2.3.

Table 2. 3 Established Seafood-Related Trails

Region	Name	Source-website
Australia	Seafood & Aquaculture Trail - Eyre Peninsula	(Tourism Eyre Peninsula, 2009)
United Kingdom	Scotland's Seafood Trail	(Visit Scotland, 2009)
USA, Louisiana	Seafood Sensation Trail	(Louisiana office of Tourism & Tarasco, 2009)

The concept of the MFA's Top of the South Aquaculture and Seafood Trail is based on Australia's very successful Seafood and Aquaculture Trail established by the Tourism Eyre Peninsula (TEP) in 2001. The self-drive Trail in Australia is based on the region's key resource, the seafood industry. Sixteen tourism businesses in ten towns are linked under a single brand through a 630km road network. The Trail is managed through a regulation system that involves a reasonable initial fee, an annual membership, and 2% cooperative marketing levy on total tour revenues. The collaboration has resulted in a brochure, an increase in jobs, cross-promotion, attention from media worldwide, 25,000

tours a year and at least in 2003, AUS\$ 180,000 in tour revenues. The Australian Trail demonstrates that successful trails need an authority willing and able to keep participating businesses as active members of the trail organisation. A trail is not just a collection of different businesses offering certain products and/or services to tourists in a certain area or region; for long-term success a trail needs to be an attraction in its own right (South Australia TEP, 2007). This example shows that linking seafood and tourism in a new way offers coastal regions development potential when it is well managed through local leadership.

Even so, rigorous evaluation criteria for themed trails have not been developed. Evaluation needs to assess success indicators such as economic benefits to participating businesses (e.g. more customers, assessment of added value), documentation of visitor behaviour with regard to trail use, and sustainability (long term maintenance, leadership and participation).

2.5 Innovation

Changes in globalisation, demographics, climate, safety and security issues, crisis management, technology, and the liberalisation and deregulation of markets have required that tourism destinations adopt innovative planning and management techniques (Buhalis & Costa, 2006). One definition of innovation is presented by Rogers (2003):

Innovation is an idea, practice, or object that is perceived as new by an individual or other unit of adoption. It matters little ... whether or not an idea is 'objectively' new as measured by the lapse of time since its first use or discovery. ... If an idea seems new to the individual, it is an innovation. (p. 12)

Rogers (2003, p. 12) describes diffusion of innovation as *"the process by which an innovation is communicated through certain channels over time among the members of a social system."* The development from first knowledge to the actual innovation is driven by individuals who adopt new information, put it into practice and achieve acceptance (Rogers, 2003). Today's technologies, especially the Internet, offer a variety of opportunities and challenges for the tourism industry to develop innovations and to keep them current.

2.5.1 Innovation in Tourism

Innovation, creativity and competitiveness in the early days of tourism were focused on destination and transport development. The novelty of going abroad and enjoying sun, sea and sand has been followed by trips to long-haul destinations such as the United States for Europeans and South-East Asia for Europeans and Americans. Today innovation, creativity and competitiveness in the tourism industry requires meeting the high expectations of demanding tourists of all ages as globalisation and increased mobility from high-speed railways and low-cost airlines have increased the accessibility of new destinations (Burns, 2006).

Both the private and public sector contribute to the creativity of the tourism industry, resulting in new products and services (Hjalager et al., 2008). These changes provide direct and indirect benefits essential to integrated, sustainable forms of tourism and the adoption of innovation by locals (Rogers, 2003). Participation, individual empowerment, and the awareness of responsibility through tourism by local communities and residents is vital in this innovation process (World Tourism Organization, 2004).

The environment in which tourism innovation succeeds or fails includes several factors - consumer demand, governance, and collaborative capacity. Moscardo (2008) groups community capacity for tourism development into five categories: (1) community capacity is likewise important to tourism- and to general development of a community; (2) All kinds of processes resulting from tourism impacts need to be better understood; (3) many regions developing tourism are dependent on eco- and community-based tourism; (4) to profit and manage development options tourism knowledge has to be generated and administered well; and (5) social capital such as networks, relationships and competencies hold a significant role in community capacity building.

Burns (2006) and Pine and Gilmore (1999) identify innovation for the service sector in the twenty first century as *experience economy*, defined as a combination of education, entertainment, aesthetics and escapism. These aspects are increasing customers' interest in booking memorable experiences.

Innovation in tourism is also often based on a group effort through collaboration of consumers, employees, suppliers and a variety of less formal players (Hjalager et al., 2008). Furthermore, the innovation system is “all important economic, social, political, organisation, and other factors that influence the development, diffusion, and use of innovation” (Edquist, 2001, p. 11).

The management and planning of innovation in tourism destinations are also influenced by several external and community specific factors such as increasing competition in the international marketplace; multiple stakeholders holding a variety of interests; rapid population growth; global mobility of technology, capital, labour and people; decreasing unique resources; as well as environmental and social issues (Fyall & Garrod, 2005). Thus new methods and tools are necessary to develop and evaluate innovative sustainable tourism products.

In the 21st century, strategic alliances dominate business organisations and distribution. Through collaboration and networks, market share increases for all players in a destination (Burns, 2006). The public and private sector, local residents and destination tourism marketing organisations have to work together to realise a positive outcome (Jamal & Jamrozy, 2006).

2.5.2 Innovation in Peripheral Regions

For many peripheral tourism destinations, innovation has become a policy priority as a means to initiate production, service development, and supply (Aarsaether, 2005).

In the research of ‘Innovation Systems in Nordic Tourism’ the Nordic Innovation Centre focused on the “constituents of success in the industry and what can be done to facilitate and maintain success through policy measures” (Hjalager et al., 2008, p. 5). The ten case studies (two in each country: Norway, Sweden, Finland, Denmark, and Iceland) used in the study have economic and cultural engagement in marine commercial fisheries, involve peripheral communities, address the seasonality of tourism, and are of interest to tourists seeking unique destinations and experiences in more exotic climates and landscapes.

Thus the study provides an enlightening comparison case for evaluating the New Zealand experience.

The general framework (Figure 2.2) was developed by the Nordic Innovation Centre as an example of a tourism innovation system. The framework facilitates evaluation of destination attributes in the context of: (1) present structures, actors, and relations, (2) driving forces for innovation, and (3) the outcomes (Hjalager et al., 2008, p. 24).

General Framework		
1) Structures, Actors and Relations	2) Driving Forces for Innovation	3) The Outcomes
Nature of relations – strong, weak, formal or informal	External pressures for changes in the innovation system	Products and services for the tourists
Mobilising role of actors – how are new relations created	Second comers, entrepreneurial opportunities	Educational spin-offs
Diversity of relations	Profit motives	New managerial methods and competencies
Power of relations	Altruistic-Ego	Networks with actors, new ways of mobilising
History of relations	Public sector role	Reversed innovation – innovation in the hinterland – beneficial for the population
	Professional/Scientific development that goes hand in hand with the innovation system	Reversed business spin-offs
	Family ties	Tourism secondary innovation
	Trust	
	Tourism policies	
	Policies in other fields	
	Role of customer	
	Societal ethos and altruism	
	Synergetic driving forces	
	Balance in the institutions; volatility and stability	

Figure 2. 2 General Framework for Case Analysis

In this framework, the main drivers of innovation processes are private business enterprises that interact in similar product clusters such as fisheries. Because tourism involves a diverse group of private enterprises that cut across product clusters, the commercial segment often contributes less to innovation within the tourism system. Hence the focus of the framework is on the role of public,

voluntary and private organisations that drive the development related to the tourism industry (Hjalager et al., 2008).

Based on 60 interviews with key informants in successful tourism destinations and ventures in five different Nordic countries, The Nordic Innovation Centre identified nine characteristics of innovation systems (Table 2.4) (Hjalager et al., 2008).

Table 2. 4 Characteristics of a Successful Innovation System

Multitude of Actors	<ul style="list-style-type: none"> • Corporate representatives • Voluntary organisations • Public actors
Diversity and Density of (actor) Relations	<ul style="list-style-type: none"> • Personal backgrounds, knowledge, connections • Bridge cultural, social and institutional gaps • Feel belonging to area • Hold many social positions at once
Mobilising Role of Key Actors	<ul style="list-style-type: none"> • Visionary actors facilitating growth and stabilisation • Host of resources • Powerful focal points (also weakness)
Open Resource Access	<ul style="list-style-type: none"> • Open and inviting atmosphere • Willingness to share resources and knowledge • New entrants fill holes in value chain
Second Comers to Innovation Being Promoted	<ul style="list-style-type: none"> • Reap benefits of innovations tried and tested by pioneers who failed
Keen Competition	<ul style="list-style-type: none"> • Competition for resources and customers • Actors cooperate on various issues without agony
Public Sector Role	<ul style="list-style-type: none"> • Decisive role facilitating innovative practices • Ties with education sector • Less prevalent than on other fields • Hampering role
Increasing Global Outreach	<ul style="list-style-type: none"> • Actors increasingly invite knowledge, capital and ideas • Increasing links with larger communities for marketing and resource purposes
Increasing Cross-Sectoral Outreach	<ul style="list-style-type: none"> • Effects on other sectors like science, education, business, leisure, health, charity, the environment

The characteristics show the different contributions of a variety of parties involved in the innovation system. It becomes obvious that innovation is based on a combination of the various capacities offered by every individual stakeholder and stakeholder organisation. There is a need for shared knowledge between public, voluntary and private stakeholders, to generate experiences that develop and provide access to resources and support of

existing relationships to lead to a unified regional picture and innovative developments for communities.

A similar innovation system (Figure 2.3) was adopted by the province of Newfoundland and Labrador in Canada (Government of Newfoundland and Labrador, 2005, p. 42). This regional strategy also supports arguments for partnership between public, voluntary and private stakeholders. The peripheral innovation model illustrates the relationships of the key entities and elements involved in the actual performance of innovation (Government of Newfoundland and Labrador, 2005).



Figure 2. 3 Peripheral Innovation Model

The outer circle identifies the institutional and organisational stakeholder sectors, pointing out the importance of their collaboration in advancing the economy through innovation. The main benefits of collaboration include greater efficiency in terms of commercialisation and marketing and increased development of new products and concepts. Moreover, joint forces provide

additional resources and lead to economies of scale in terms of investments. In this sense, collaboration contributes to the overall strength of the system to make the system work. The government has to persuade and enable partnerships (Government of Newfoundland and Labrador, 2005).

The inner circle illustrates the essential components to supporting innovation performance that include:

- the government's positive perspective and respect for new ideas and implemented risks of those (culture of innovation)
- the allocated financial support, flexible policies and regulations that increase innovation capacity (financial supports, and regulation and policy)
- the importance of featuring the essential infrastructure in physical and information matters (infrastructure)
- an organisational formation benefiting the existing strengths and creating new ones (industry structures)
- the potential to seize chances to promote local goods and services with innovative character (market opportunities)
- opportunities for obtaining adequate expertise to be innovative and work in such an environment (skills and knowledge).

These components lead to "increased productivity, economic value and social gain" (Government of Newfoundland and Labrador, 2005, p. 41). Further the Government states:

With this system, trained personnel are able to research and develop new products, processes and services, and work with business and development groups to bring them to market. Labour and professional associations foster networking and partnerships to identify training needs and develop opportunities for growth. They also build consensus and expertise to ensure obstacles are recognised, and efforts are focused in the areas with the highest potential for success, at the same time, government and other stakeholders help to facilitate investment, support infrastructure, enhance skills and market development, ensure a supportive policy environment and work to advance a culture of innovation throughout the province. The result is a higher level of innovation performance and a more prosperous Newfoundland and Labrador. (p. 42)

In their innovation strategy the Government of Newfoundland and Labrador (2005, p. 10) states that “Innovation is about change. It is about new ideas, learning to do things differently, and dealing with familiar situations in new ways.” The government focuses on this innovative approach in guiding strategic planning and policy development that makes the most out of the change. The goal is to increase diversification and turn it into competitive advantage.

2.5.3 Innovation in New Zealand

Similarly, in New Zealand, the Ministry of Economic Development (2008) views innovation as a “process of creating and introducing new ideas and ways of doing things” with innovative activities as a key driver of growth. The Ministry of Economic Development has defined three different perspectives suggesting innovation as output, process and system (Table 2.5) (Ministry of Economic Development, 2008).

Table 2. 5 The Three Perspectives of Innovation

Output	<ul style="list-style-type: none"> • New or improved product, service or production process • Opening up of a new market • Adoption of new technology • Change to the organisation of a business
Process	<ul style="list-style-type: none"> • Basic or applied research • Development • Commercialisation • Diffusion and marketing
System	<ul style="list-style-type: none"> • Collaboration • Creativity • Tacit knowledge • Geography • Demand • Evolution • Cross-sectoral

This table developed by the New Zealand Ministry of Economic Development shows the expected outcomes of innovation and the development stages of the innovation prior to commercial introduction. Moreover, it demonstrates the interconnection (social capacity) of the different actors involved and thus the importance of collaboration and individual contribution to achieve a common goal (Ministry of Economic Development, 2008).

Encouraged by the relatively small size of the country, cross-boundary research, general scientific and economic cooperation, flexibility, and willingness to share knowledge are the main characteristics of New Zealand’s science system. Figure 2.4 shows that New Zealand’s Research, Science and Technology (RS&T) System has a focus on collaboration of policy with funding and investment agencies, research providers and government resulting in beneficial results for the country and its people (Ministry of Research Science and Technology, 2007b).

The Ministry’s model suggests that the New Zealand tourism industry and thus tourism destinations have to change according to key trends to stay competitive. This includes the capability of politicians, entrepreneurs, and academics to apply new creative and innovative approaches. Hence collaboration and competition of key actors have to be balanced to position a destination in the global marketplace (Buhalis & Costa, 2006).

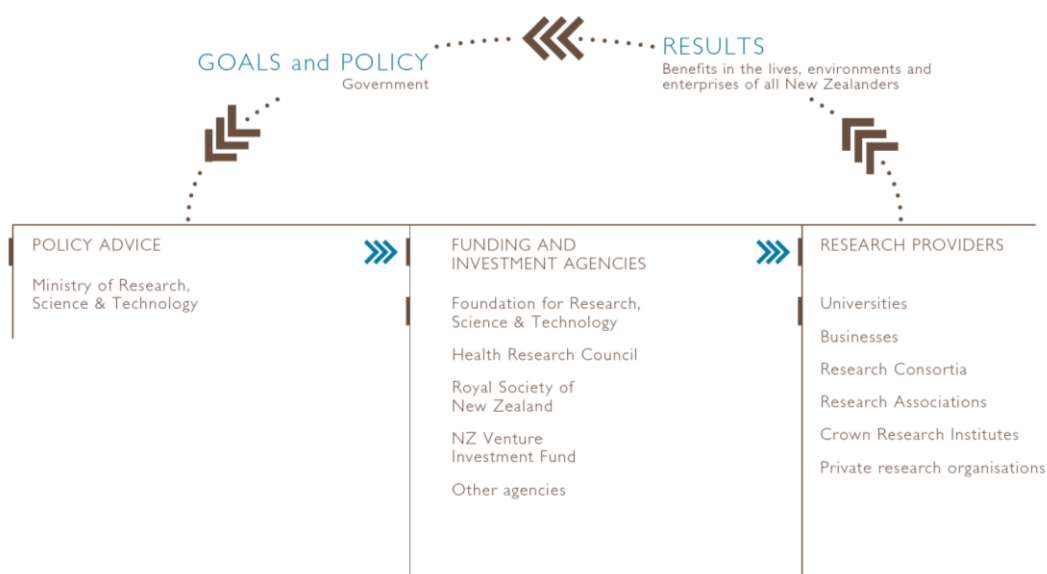


Figure 2. 4 New Zealand’s Research, Science and Technology System

Based on the Business Operations Survey 2007, facilitated by Statistics New Zealand (2008), the Ministry of Economic Development (2008) identifies companies in New Zealand as reasonably innovative. However, New Zealand’s investment into research and development (R&D) falls below the average level of investment in R&D in the OECD.

The survey reveals that the lack of management resources, the high costs of developing and introducing innovations, and the lack of skilled employees are the main reasons hampering innovation in New Zealand. Additionally 60% of the businesses point out the government regulations as slowing down innovative activities (Statistics New Zealand, 2008).

2.6 Summary

This chapter has shown that globalisation leads to challenges, but also to opportunities for tourism development in peripheral regions. To retain the local character and authenticity of a place over the long term, the creation and management of innovative strategic development plans are necessary.

The travel and tourism industry is a complex phenomenon that affects the social, cultural, economic, political and ecological environment of a destination in many different ways. Tourists unavoidably change a community's development by requiring a variety of services. It is up to the community to manage their resources in a sustainable manner and to support innovative change (Derrett, 2001). Since natural and cultural resources often serve as tourist attractions and support recreational activities, the protection of these destination attributes is required as part of a sustainability strategy (Giaoutzi & Nijkamp, 2006; Hall & Jenkins, 1998).

The fact that the number of experienced travellers is growing, leads to increasing expectations in terms of a holiday experience. Hence destination management has to consider innovative aspects that integrate public, voluntary and private stakeholders to be successful. In rural regions in particular, collaboration between communities, diverse industries, and different levels of powers and interests is important to make a difference in terms of creating positive conditions for innovation success. The fact that travellers are increasingly interested in food, local recipes and their origins is creating numerous opportunities for peripheral regions to build on their competitive advantage. The capacity of stakeholders to support the integration of seafood with tourism through the Top of the South case study will be explored in more detail through the evaluation of the region's innovative themed Trail.

The main goal of this study was to investigate the capacity of stakeholders to support the linking of peripheral communities by the means of developing a seafood themed trail integrating local aquaculture and tourism businesses in the Nelson/ Marlborough/Golden Bay region.

In order to undertake an evaluation of local conditions that create the environment for innovative development strategies in the peripheral destination, the following four objectives were established to guide the investigation:

- Inventory the tourism and aquaculture resources of the Nelson/ Marlborough/Golden Bay region.
- Assess stakeholder perceptions of the tourism and aquaculture industries and the potential links between tourism and aquaculture in developing seafood tourism.
- Assess stakeholder perceptions of the role of a themed seafood and aquaculture trail in a tourism destination dependent on marine resources and seafood harvest.
- Understand the potential role of the seafood trail in promoting local seafood to tourists as a sustainable part of the coastal landscape.

The objectives of this study are practice-oriented, because they are focused on consultations with local key stakeholders and are designed to contribute knowledge to tourism practitioners in the region rather than to examine a hypothesis-based question. This research does not aim at generalising the outcome, but at exploring a practice by defining its current phase, gaining a better understanding of its needs and challenges, and prioritising recommendations for practitioners (Dul & Hak, 2008). To develop a theoretical understanding of the links between regional tourism and aquaculture industries in the Top of the South, primary and secondary information was gathered and

analysed to evaluate the potential sustainability of seafood tourism in the region.

3.1 Secondary Research

Theoretical research was based on the review of relevant peer-reviewed literature about tourism in peripheral areas, practitioner targeted tourism planning reports and web-based tourism materials. To get an understanding of the relevance and opportunities for regional development driven by tourism and aquaculture, the destination attributes in the context of present structures, relevant actors and their relations were examined. A review of tourism and aquaculture development and policy in New Zealand and the study region was important to inform the inventory of tourism and aquaculture resources in the region.

According to Maxwell (2005) the use of existing literature helps to get a better understanding of what the researcher is seeing, and makes one more aware of particular issues and of new phenomena and innovations. The collected information provided the basis for understanding tourism supply, demand, and the sustainability of the aquaculture industry in the region. Secondary literature review further assisted in forming questions for the primary data collection in the next stage.

3.2 Primary Research

3.2.1 The Target Population

As discussed in chapter two, the regions' relevant commercial, government and private entities influence a destination's development. To distinguish the linkages between the tourism and aquaculture industries in the Top of the South and to evaluate the strengths of those relationships, the perspectives of leaders who were considered experts based on their experience and involvement with the resources were sought from the private, public and non-profit sectors.

As collaborative capacity is dependent on involvement of stakeholders representing all sectors in a community, the target population in this research

was a group of key stakeholders representing the institutional and management context in which the Top of the South Island New Zealand Aquaculture and Seafood Trail exists. These stakeholders represent sectors that are addressing innovation and have the capacity to bring change to the region. They were selected based on their ability to serve as key informants and to contribute sufficient information about the research region.

Timur & Getz (2008) find no universal definition of stakeholder, although Mitchell et al. (1997) identify power and legitimacy as attributes that are essential elements of a stakeholder typology. Therefore, legitimate stakeholders can include the businesses/industries that are impacted on by decision-making, as well as the government agencies, private consultants, planners and leaders. In addition to the dominating local small and medium enterprises (Stuart, Pearce, & Weaver, 2005), the private, public, and non-profit sectors are also identified as playing active roles and are responsible for contributing to the wellbeing of the community, especially in peripheral destinations (Aarsaether, 2005). Stakeholder groups as defined by Bramwell and Lane (2000, p. 1) support 'regular, cross-sectoral interactions between parties based on at least some agreed rules or norms, intended to address a common issue or to achieve a specific policy or goals'. As a result, this research focuses particularly on the stakeholder groups that compose the supportive institutional capacity that has enabled the Trail to be developed and that impacts sustainability of this innovation. The members of the Trail were included in the broader study but are not included in the evaluation reported here. Furthermore, user groups (i.e., tourists) were evaluated in a later study and are also not included here.

Input from the MFA and an exhaustive search of regional and local government, seafood, and tourism industry websites resulted in a purposive sample (Babbie, 2007) of 29 key informants who were from non-profit associations, regional tourism and aquaculture organisations, regional district councils (land and coastal planning), development agencies, and consultants was generated. Because of their significant involvement in commercial and aboriginal fisheries and tourism industries in the region, local Māori organisations were also

included. The resulting contact list was reviewed and validated by the MFA. Data gathering took place from 30th June - 10th July 2008.

3.2.2. Case Study Approach

In order to explore the capacity of stakeholders to link the seafood and tourism industries, this research employed a case study strategy that incorporated a mixed method approach. According to Veal (2006), case study approaches (single or multiple) are used to cover contextual conditions intentionally and to verify the relation to a particular research objective. Yin (2009, p. 2) defines a case study as “... preferred method when (a) ‘how and ‘why’ questions are being posed, (b) the investigator has little control over events, and (c) the focus is on a contemporary phenomenon within a real-life context.” Case studies can be used for descriptive, explorative and/or explanatory purposes (Yin, 2009). This research was an explanatory case study: focusing on identifying the strengths, weaknesses, opportunities and challenges of the creation of the Top of the South Aquaculture and Seafood Trail. The Trails function is to connect peripheral communities by linking businesses and attractions. Using an explanatory approach, the research methods were designed “to ‘explain’ a phenomenon ... to stipulate a presumed set of causal links about it, or ‘how’ and ‘why’ something happened” (Yin, 2009, p. 141).

This explanatory case study approach is an important step given the lack of assessment of themed trails and the fact that seafood and tourism linkages have not been extensively studied in New Zealand or elsewhere. The main advantages of the case study approach for this research are that the ‘evidence is grounded in the social setting being studied’ and the opportunity is created for in-depth data analysis (Jennings, 2001, p. 178). In this context a case study approach was selected also to develop a comprehensive overview of the region’s tourism and aquaculture industry, its structures, actors and relations. A further advantage of the case study approach is member-checking to verify the results, which limits the chances of research bias (Jennings, 2001).

Creswell (2007) identifies a case study as a qualitative research method used to explore one or more settings/cases over time involving a detailed data

collection based on a broad range of information sources. Also, Yin (2009) explains that a case study as a research method can include a mix of qualitative and quantitative research approaches. Therefore, to investigate the potential for strengthening tourism linkages to aquaculture and seafood in the Top of the South Island, a mixed method approach and investigation of a broad range of information sources was utilised for this case study.

3.2.3 Mixed Method Approach

Until recently tourism research was dominated by quantitative research mainly guided by the determination of economic significance (Jennings, 2001). Today tourism research is focused more on tourists' behaviour, the economic, social and the environmental impact of tourism, and the overall tourism experience, which increases justification for use of the qualitative approach (Jennings, 2001). However, since the 1980s, a mixture of methods has been used in order to reduce any bias that may occur by using a single method in data collection or analysis, and also to promote the significance of the particular research (Rocco, Bliss, Gallagher, & Perez-Prado, 2003).

According to Faulkner & Valerio (2003), a combination of different research techniques that complement each other should be considered in order to balance the strengths and weaknesses of the various research techniques. In this study, the use of multiple techniques involved integration of findings from the literature review, semi-structured face-to-face interviews and a self-reply questionnaire.

By applying the mixed method approach in this research, the intention was to respond with greatest possible clarity to the research aim by understanding the role of stakeholders in the creation and sustainability of an aquaculture and seafood trail. The idea was to generate overlapping data by looking at the same issue from different perspectives (Gorard & Taylor, 2004; Johns & Lee-Ross, 1998).

Exploratory questions were asked comprehensive understanding of the present situation at the case study site. In order to answer exploratory questions, a combination of qualitative and quantitative methodologies was adopted. The

qualitative exploratory questions used in interviews (Appendix 2) asked for strengths, weaknesses, opportunities and threats (SWOT) of the Aquaculture and Seafood Trail as a product to understand the internal (ie within the Trail) and external (i.e. environmental, political) factors distinguishing its potential to become a successful intervention for the region (Phillips & Pittman, 2009). Exploratory questions asked in the self-reply questionnaire investigated cultural and social environmental details at the individual level. Both approaches provided comprehensive research strategies that included data collection and its analysis (Yin, 2003). Combining semi-structured face-to-face interviews and self-replied questionnaires was intended to add more depth and richness to the study.

Qualitative

The qualitative data were obtained through individual semi-structured, face-to-face interviews that encouraged the researcher to be open-minded during the data collection (Maxwell, 2005). Interviews were conducted by one of three members of a project team (including Dr. John S. Hull, Laura Jodice and Ulrike Sassenberg) who had combined expertise in marketing, tourism development, seafood harvest and marine ecology. The research was conducted as part of a larger project in the Tourism and Community Programme at the New Zealand Tourism Research Institute examining the role of innovation in promoting sustainable tourism development in peripheral communities. As part of the New Zealand case study, two sets of survey participants were interviewed -- businesses and stakeholders -- to gather information about the Top of the South Aquaculture and Seafood Trail. The focus of the research reported here was on understanding the role of the stakeholders who composed institutional structure and environment in which the trail existed.

Individuals were first contacted by phone where they were introduced to the project and its benefits to them. They were then asked if they would be willing to participate in a one-hour in-person interview at their place of business. Out of the 29 contacted stakeholders, 22 agreed to participate, a 75.86% response rate of the potential identified population group in the case study region. The majority of individuals not able to participate in the research were either in the

region and not available for a meeting during the time of the survey work due to a scheduling conflict, or were out of the country on overseas business. As qualitative research is generally based on a small but selective sample, this group of key stakeholders was an adequate sample to achieve the research objectives (Sampson, 1996).

Interviews were conducted primarily during the first two weeks of July, 2008. At the beginning of the interview participants were asked to review a project information sheet and then sign a consent form (Appendix 1). They were also asked if the interview could be recorded by voice recorder. The participants were told that the audio-recordings and notes were confidential and would be stored by the project investigator in a secure, password-protected directory at the New Zealand Tourism Research Institute (NZTRI). All respondents agreed to be audio-recorded.

In each interview, the participant was presented with the Trail brochure and asked if they were familiar with it. If they did not know of the Trail, the concept was explained to them, so that they could understand the project and answer questions pertaining to the concept of the Trail.

According to Maxwell (2005) the main strengths of qualitative research methods are the inductive approach, the emphasis on words rather than on numbers, and the focus on specific situations or people. In this study it was not possible to ask direct economic questions comparing pre- and post-trail profits and costs, hence the inductive approach of asking exploratory questions was considered most appropriate in order to delve deeply into the given issues and meet the research objectives.

Collecting data directly from its occurrence results in the evidence being grounded in the social setting where it is being conducted (Neuman, 2006). Therefore, interviews occurred mainly in the participant's place of work or at a location near their workplace (e.g. restaurant). To achieve the goal of qualitative research and to generate rich and detailed data providing an insight into participants' perspectives and behaviours, and to help the participant feel

comfortable, the interview began with two questions about the function of their organisation and their particular position (Veal, 2006).

Later questions focused on the interviewees' perceptions about the strengths, weaknesses, threats and opportunities of the Trail for the region in terms of new marketing opportunities, partnerships, new knowledge for the region's tourism planners and policy makers, and direct or indirect financial support. During the interviews participants were also questioned about trail performance, for example, whether the Trail enhanced the region's products and services for visitors; if they had noticed any changes such as new infrastructure, facilities, products and services; whether they felt the Trail had improved the business performance in the region related to the Trail; and if the Trail had been affected by new regulations and policies. Finally the interviewee was asked whether he or she knew of any other innovative opportunities for the tourism and aquaculture industry in the region. Questions were mainly based on the summary of innovation strategies outlined in Chapter Two. To ensure that the data were comparable, questions were asked in a consistent manner (complete interview outline Appendix 2).

Quantitative

Following the interview, participants were asked to complete a 15-minute written self-reply questionnaire. The survey covered questions about the participants' personal background including the sector they represent, their main responsibilities and what services the stakeholder provided to the region. The questionnaire also asked for respondents' level of "agreement or disagreement" with 40 statements about status of and support for tourism and aquaculture in the region.

These statements were developed to represent the various components contributing to tourism success in a context of the research objectives. The rationale for selection of these survey items was based on the need to (1) form a better understanding of the existing tourism and aquaculture resources in the trail region; (2) assess stakeholders' perspectives on the potential of linking the tourism and aquaculture industries in the case study region; (3) assess

perspectives on the role of a themed trail in a region that is dependent on tourism and aquaculture, and; (4) to support the evaluation of the trail's role in promoting more sustainable forms of tourism development. The statements were selected to represent categories of information consistent with past case study research conducted in peripheral regions by NZTRI staff and students (V. Clark, 2007) as well as surveys developed to assess tourist demand for seafood tourism products and experiences in North America (Hull, 2008; Jodice & Norman, 2007; Norman, Jodice, & Shenoy, 2004). The following eleven categories were selected:

- general perception of the role of tourism in the region
- resident attitudes about tourism and aquaculture
- economical benefits/challenges for the region
- environmental impacts of tourism
- seasonality of the local tourism industry
- level of customer service in the region
- marketing concepts related to tourism in the region
- planning and coordination of tourism
- access to and in the region
- product development in the region based on local products
- industry participation in tourism development

Each item was rated by the participants using a Likert scale from 1=strongly agree to 5=strongly disagree. The five point scale was selected to keep questionnaire as simple as possible and to avoid burdening respondents. . In addition, because the survey was primarily intended to provide supplemental information to the interview data and rigorous multivariate analysis was not planned for answering research questions, there was less concern about normality problems caused by the a 5 point or smaller likert scale. . The scale was designed to evaluate perceptions of the key informants who were involved in managing and promoting the aquaculture and tourism sectors. This approach is based on the idea that perceptions of community leaders are important in facilitating the progression of an innovation (Rogers, 2003). A copy of the questionnaire is presented in Appendix 3.

Usually quantitative research is based on a large representative sample (Sampson, 1996) and its outcome is reliable data that can be generalised (Veal, 2006). In this research, 19 out of the 22 interviewees completed the questionnaire. This represents an effective response rate of 65.5% for the total identified population of key informants (N=29) and response rate of 86.4% of those who agreed to participate in the interview. However, the data collection was not intended to permit extrapolation to the regional population but to get more from the 'interview' without tiring the respondents and as a means to examine and summarise the characteristics and perspectives of the group of respondents. To avoid misinterpretation of the survey questions, the researcher was available for clarifying questions while the participant filled out the self-replied questionnaire (Nardi, 2006). In addition to the questionnaire an online version was prepared as a backup for respondents who might not have had additional time to answer the questionnaire following the interview. Four respondents answered the questionnaire online.

3.3 Analysis

The mixed method approach generated a data set for analysis and interpretation to provide insights into understanding how the Trail innovation might promote sustainability (Jennings, 2001). The analysis of this research focused on the identification of the relationships between literature review and the qualitative and quantitative data results.

Usually quantitative data are evaluated with the aid of arithmetical software and relationships are analysed to evaluate the statistical significance (Sampson, 1996). The quantitative data from this research were analysed using SPSS 15.0 software for advanced statistical analysis. Due to the small sample size, it was only appropriate to report means, frequencies for responses and cross tabulations - and was not appropriate to evaluate significant relationships or hypotheses using regression analysis.

Data comparability and general analysis of the semi-structured interviews was more time-consuming and difficult, but the results generated thorough information as a result of spontaneous and personal responses (Sampson,

1996). The qualitative analysis of this research involved transcription of the 22 interviews, organisation of statements according to the interview framework (SWOT analysis), and evaluation of key concepts for emergent themes. This analysis was conducted by myself and one other member of the research (interview) team who independently coded the transcribed interview texts. Initial agreement between the team members' results was 81.32%. Following this process the researchers then used the initial results to develop consensus on a list of emergent common themes addressing the sustainability of the Seafood Trail as an innovative tourism practice for the region. These revised codes were used to improve consistency in the coding terminology. Following revision of coding consistent with the agreed-upon list, and an additional review of areas of agreement and disagreement, the researchers came to a near 100% agreement.

Themes represented two main clusters: 1) context - addressing issues at the case study site and 2) product - focusing on the Trail as an innovative idea. Thirteen total themes were identified, categorised in both clusters and rated by the total number of times a concept was mentioned on that particular theme. In some cases a single interviewee mentioned a concept several times, meaning the count does not represent the number of respondents, but rather, the number of times a concept was mentioned.

The qualitative analysis focused on uncovering these emergent themes, which were then examined in the context of the innovation frameworks. Specifically, these themes were compared to the concepts and criteria identified in the peripheral region innovation strategies to evaluate consistency and identify any existing gaps pertaining to the Aquaculture and Seafood Trail.

3.4 Limitations

The research is based on opinions of regional key stakeholders, hence results represent the perspective of leaders who would be considered experts based on their experience living and working in the region. Although the findings may not be interpreted as fact or represent the perspective from ALL residents in the

region, they provide useful indicators. Consequently, there are limitations in the generalisation of the research results as findings are specific to this case.

Furthermore, to ensure that research results are understood by key decision-makers, the presentation of the findings was orientated towards comprehensibility (Faulkner, 2003). Despite these limitations, the applied research focused on tourism development outcomes/strategies aimed at informing community decision-making in a peripheral region. The study results therefore contribute to tourism destination development research, and can provide insights into the importance of innovation in related cases.

3.5 The Validity and Reliability of the Results

The variety of research methods adopted as part of the case study assisted in strengthening the analysis performed on the qualitative and quantitative data. For example results from semi-structured interviews were summarised in a context of relevant policy in relation to questions asked (M. Clark, Riley, Wilkie, & Wood, 1998). The primary results were also cross-checked with information from secondary resources to further verify findings. For example, if a stakeholder indicated that a certain aquaculture policy or ecological sustainability of aquaculture was a concern, it was necessary to consult Ministry of Fisheries and other fisheries management information to further clarify and validate the nature of the issues.

There are four common methods used to establish data validity of empirical social research. These are summarised in Table 3.1 in the first column 'TESTS' (Kidder & Judd, 1986). In the second column, Yin (2009, p. 40 f.) presents tactics outlining how to deal with these four tests in a case study and summarises the stage of applicability throughout the research in the third column (Table adapted from (Yin, 2009, p. 40 f.).

Table 3. 1 Case Study Tactics for Four Design Tests

TESTS	Case Study Tactic	Phase of Research in which Tactic Occurs
Construct Validity <i>(identifying correct operational measures for the concepts being studied)</i>	<ul style="list-style-type: none"> • Use multiple sources of evidence ✓ • Establish chain of evidence ✓ • Have key informants review draft case study report 	Data collection Data collection Composition
Internal Validity <i>((for explanatory or causal studies only and not for descriptive or exploratory studies) seeking to establish a causal relationship, whereby certain conditions are believed to lead to other conditions, as distinguished from spurious relationships)</i>	<ul style="list-style-type: none"> • Do pattern matching ✓ • Do explanation building • Address rival explanations • Use logic models ✓ 	Data analysis
External Validity <i>(defining the domain to which a study's findings can be generalised)</i>	<ul style="list-style-type: none"> • Use theory in single-case studies ✓ • Use replication logic in multiple studies 	Research design
Reliability <i>(demonstrating that the operations of a study – such as the data collection procedures – can be repeated, with the same results)</i>	<ul style="list-style-type: none"> • Use case study protocol ✓ • Develop case study database 	Data collection

A self-assessment of accomplishments in Table 3.1 reinforces the combination of the outlined tests that ensure the quality of empirical research.

In this research, the mixed method approach ensured the use of multiple sources such as literature review, government publications, journals, local websites, industry reports, interview data and results of the self-reply questionnaire. Additionally the derivation of evidence can be followed from the emergence of the research questions to the results. Internal validity was ensured by using innovation models as a basis for the development of research questions and the analysis of the results. The association with the theory ensures the comparison of empirical patterns with predicted ones (Yin, 1994).

Additional explanation-building supported internal validity as official documents helped to get a better understanding of the theoretical case study structures and actors related to the aquaculture and tourism industries, and the primary research helped to get a good understanding of reality.

To evaluate the analytical generalisation of the findings, innovation theories that evolved from similar case study research served to provide comparable frameworks.

This study intends to increase knowledge and explore the role of stakeholders in the Top of the South to gain a better understanding of the needs and challenges of the Seafood Trail to inform practitioners.

This research combines semi-structured face-to-face interviews and self-reply questionnaires with a variety of people who are associated with the Trail or with the aquaculture/tourism sectors, to ensure that collected data are valid to the question and situation. The ethical guidelines issued by the Auckland University of Technology Ethics Committee (AUTEC) were respected throughout the research process.

The Top of the South region of New Zealand is located in the north and northeast of the South Island (Figure 4.1) (Terralink International Limited, 2006). In general the region's climate is pleasant year-round making the area popular with tourists who are looking for recreational opportunities such as tramping, swimming, kayaking, and boating (Tasman District Council, 2006c), "High sunshine hours and idyllic climate mix with the wine trail, the incredible waterways and coastline, the alpine valleys and native forests, cafés, restaurants, culture and history" (Marlborough Regional Development Trust, n.d.-d). In addition to tourism, the region also supports 80% of the entire New Zealand aquaculture industry, with over 9,140 ha of mussel, salmon, and oyster farms owned and operated by multiple small, medium and large businesses, including national seafood companies focused on international seafood export (Aquaculture.govt.nz, n.d.-a).

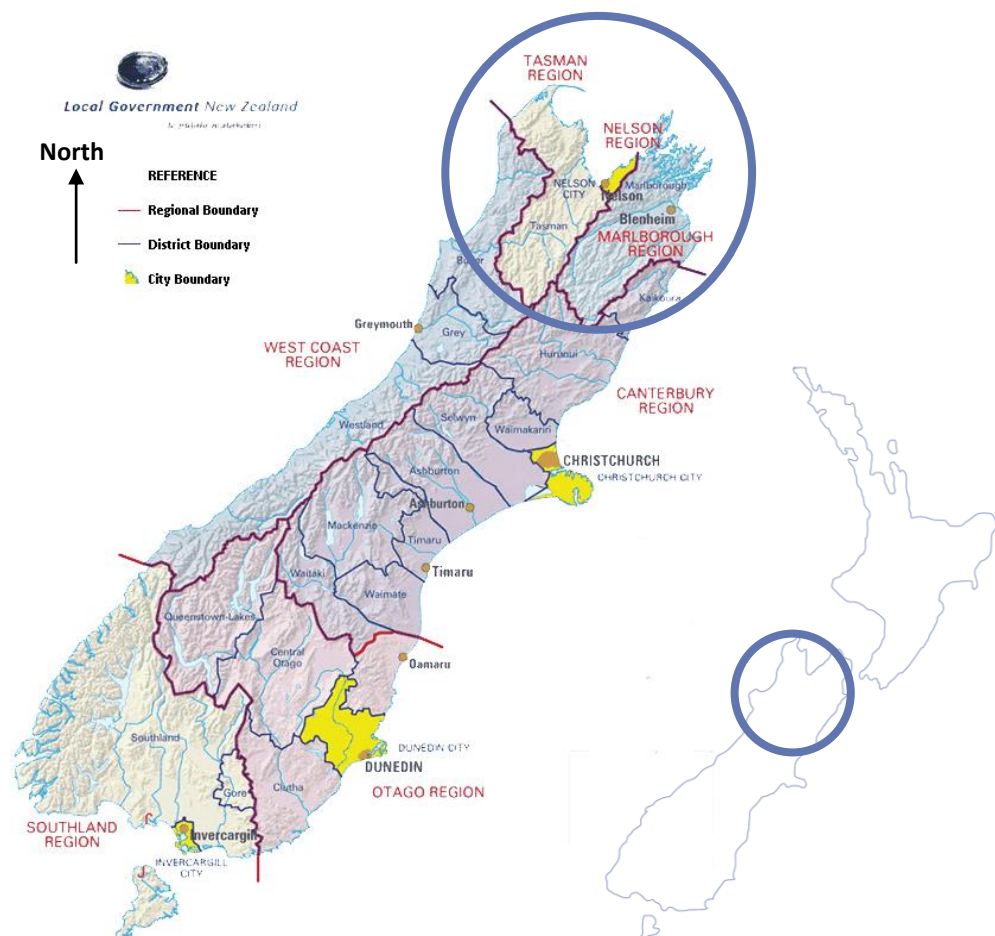


Figure 4. 1 Regional Tourism Organisations, South Island, New Zealand

This chapter provides a summary of the case study ‘The Top of the South’s Aquaculture and Seafood Trail’ and of the larger region to provide a context for understanding the significance and growth of aquaculture and tourism to regional development. A brief history of the region is followed by the identification of the public and private stakeholders and institutions involved in the research, development, and administration of the tourism and aquaculture sectors. This information provides a basis for understanding the importance of tourism and aquaculture to the local economy and the potential for innovation in building links between these two sectors in the area. As such, it represents the outer ring of the innovation framework graphic developed by the Government of Newfoundland and Labrador (2005) and is supported by the structures, actors and relations of the Nordic innovation framework (Hjalager et al., 2008, p. 24).

Table 4.1 Peripheral Innovation Strategy Linked to General Framework: Structures, Actors and Relations

Peripheral Innovation Model: Structure, Actors	General Framework: Structures, Actors and Relations
Government	<ul style="list-style-type: none"> • Nature of relations – strong, weak, formal or informal • Mobilising role of actors – how are new relations created • Diversity of relations • Power of relations • History of relations
Communities and Regional Development Agencies	
Business Support Organisations and Associations	
R&D Institutions	
Education and Training Institutions	
Business	
Labour	

4.1 The MFA’s Top of the South Aquaculture and Seafood Trail

Over the last 30 years the exponential growth of aquaculture and tourism in New Zealand has intensified resource conflicts in coastal communities. Aquaculture has impacted on coastal views and the marine ecology of the Top of the South. Tourism has impacted on local communities by undermining the cultural significance of local environmental resources and causing conflicts between recreational and industrial fishing. In 2005, in response to these conflicts the Marine Farming Association (MFA) produced a brochure to

promote and market the “Top of the South Aquaculture and Seafood Trail” (Figure 4.2). The Trail is located in the Nelson/Marlborough/Golden Bay region and links 21 businesses that are associated with the seafood or aquaculture industries including restaurants, accommodation, mussel farms, and fresh seafood suppliers in communities from Kaikoura to Takaka along a 350km-long route.



Figure 4.2 The Marine Farming Association’s Top of the South Aquaculture & Seafood Trail

Initial goals of the Aquaculture and Seafood Trail were

- to give locals and tourists a better understanding of the value of aquaculture to the region.
- to raise community awareness of the importance of marine aquaculture to the area as a coastal tourist destination.
- to improve community attitudes about marine farm presence and expansion in the Queen Charlotte and Pelorus Sounds and Golden Bay.

The MFA’s concept of the Aquaculture and Seafood Trail was designed based on Australia’s very successful Seafood and Aquaculture Trail developed by TEP in

2001. However, the Trail in the Top of the South was developed through the leadership of the MFA that involved the executive director driving along the main roads and personally visiting businesses and inviting them to participate. Believing that the Trail is a chance to improve community attitudes about marine farms and to create benefits for local businesses in terms of national and international attention, the challenge was to convince regional stakeholders to become involved in supporting the Trail concept. The MFA realised the possibilities of developing the Trail further and thus forged a link between seafood and tourism through the present research.

4.2 History Nelson/Marlborough/Golden Bay

Initial settlement by Maori ancestors coming from Polynesia occurred in New Zealand around 1280 (Lowe, 2008). About 350 years later, in 1642, Abel Tasman, the Dutch navigator anchored in Golden Bay, followed by the Englishman Captain James Cook, who arrived in 1770 in Tasman Bay (NZine, 2003). In 1805, the region was taken over by the 1st Viscount Nelson and Admiral at the Battle of Trafalgar after whom Nelson was named. The New Zealand Company from London had bought the area around Nelson and the Marlborough Sounds in 1839, but the region developed slowly due to the shortage of land for settlers and disputes between Māori and the arriving settlers. Around 1850, Nelson was more a fishing point than a permanent settlement. In 1853, it gained city status as the second city of New Zealand and the Nelson Provincial Government was established. In the 20th century, settlement in the area consolidated and agriculture became the main source of income.

4.2.1 Tourism in the Top of the South

The top of the South Island has been recognised as a tourist destination since Chapman published New Zealand's first guide book in 1872. He points out the tourist-friendly environment related to transport possibilities in combination with the region's "grand romantic scenery and historical associations" (Chapman, 1872, p. 90). In 1905, Thomas Cook (1905) wrote:

This Sound, and the others in the neighbourhood, are celebrated for their picturesque beauty, their long reaches and calm depths, making together some of the finest pictures of coastal scenery ever met with. (p. 68)

Tourism has become more and more important to the area (Nelson New Zealand, n.d.-b; NZine, 2003), particularly over the last 30 to 40 years. The Marlborough Sounds are the main natural attractions of the region. The unique scenery of the region attracts numerous visitors (Marlborough Online, n.d.-a). The area includes the Queen Charlotte Sound, well known for its beautiful shorelines, deep bays and coves; the Pelorus Sound with sea kayak areas with the rest of the sound having a predominance of farmland, forestry and aquaculture; and the smaller and shallower Kenepuru Sound, surrounded by sandy beaches, native bush and farmlands. Aside from cruising, kayaking, fishing and other water activities, the 71-km-long Queen Charlotte Track offers guided and freedom walks, mountain biking, a variety of accommodation and water transport services for luggage (Marlborough Sounds Adventure Company, n.d.).

The Tasman area is famous for its diverse landscape including mountains, rivers, mile-long sandy beaches and its three national parks:

- Abel Tasman (22,541 hectares), famous for its golden beaches, the coastal Abel Tasman Track, sea kayaking, camping grounds and huts as well as private lodges;
- Nelson Lakes (101,753 hectares) which comprises some 100,000 hectares of the Southern Alps;
- Kahurangi (452,000 hectares), offering mainly hiking tracks and caving.

Marlborough's wine industry has been playing a major part in the region's economy over the last 40 years (Stephens, 2000; Wine Marlborough New Zealand, 2008b). A main activity for tourists is to visit one or more wineries along the Wine Trail (Wine Marlborough New Zealand, 2008b). In an effort to diversify, today most vineyards offer restaurants, event venues and art exhibitions (Marlborough Online, n.d.-b). The region organises several festivals that attract and entertain residents, domestic and international visitors. The main festivals in the Marlborough region are the Havelock Mussel Festival in March, the Grape Ride in April and the Marlborough Wine Weekend in October.

Nelson offers several festivals involving music, film, art and also gastronomy (NationMaster.com, n.d.).

4.2.2 Aquaculture in the Top of the South

In the 12th century the first Māori settled in the area focusing on hunting, gardening and fishing. During this time period it is reported that Māori engaged in rudimentary aquaculture activities, such as placing rocks in the area where oyster or mussel larvae would settle (Food and Agriculture Organization of the United Nations, n.d.).

Starting in the 1960s, aquaculture has developed from small beginnings into a major industry in the area (Dawber, 2004). New farming techniques were developed, resulting in the rapid production of New Zealand mussels. Aquaculture offers a high level of employment and generates economic activity, which is of great importance in this area, particularly for Māori, who traditionally have strong links to their coastal settlements and rights to marine resources established by the 1840 Treaty of Waitangi and marine resource management legislation. Today the biggest fishing port in Australasia is located in Nelson (Nelson New Zealand, n.d.-a).

The region in the Top of New Zealand's South Island comprises an overall area of 9,142ha (Marlborough: 3,056.4ha; Tasman: 6,086.8ha) where mussel farming, mussel and scallop spat catching are the main activities. With a tradition dating from 1970, aquaculture is Marlborough's second largest industry today (Aquaculture.govt.nz, n.d.-a). Marine farms cover 2,600ha of the Marlborough Sounds, which is less than 3% of its total area. Pelorus Sound is home for the majority of farms; however, a few are also in Port Underwood, Croiselles Harbour and Queen Charlotte Sound. Greenshell™ Mussels (*Perna canaliculus*), King Salmon (*Onchorhynchus tshawytscha*) and Pacific Oysters (*Crassostrea gigas*) are the greatest contributors to the growth of aquaculture production in New Zealand (Marlborough Regional Development Trust, 2004; New Zealand Aquaculture Council, 2006). Marlborough produces 80% of New Zealand's Greenshell™ mussels, which earn about 90 million NZD p.a.

(Stephens, 2000) and this product is now exported to more than 60 countries (Aquaculture.govt.nz, n.d.-b).

Greenshell™ Mussels are grown on long-lines, which are attached to floats. A typical mussel farm uses about 3 to 5 ha of water space; use of water space has to be permitted by the Regional Council (Aquaculture.govt.nz, n.d.-e). While most of the spat (oysters less than 25 millimetres long) is collected at 90-mile-beach on New Zealand's North Island then transported by air or trucks to the farmers, some spat is also found locally in Marlborough and Golden Bay (Marine Farming Association, 2005a). Mussels live on cell algae and planctonic animals, which they filter out of the sea. A single mussel filters about 300 litres of water per day, so with approximately 900 million mussels in the Marlborough Sounds, an enormous amount of water is filtered for nutrition every day. It takes between 15 and 18 months until mussels are ready to be harvested (Marine Farming Association, 2005a).

King (Chinook) Salmon was originally introduced to New Zealand as a sport fish in the early 1900s. This fish is now grown in sea cages in the cooler waters of the Marlborough Sounds, with a few freshwater farms also operating in the Tasman region (Aquaculture.govt.nz, n.d.-h). The farming started in the 1970s and has since grown to 5000 tonnes of salmon, worth more than NZ\$50 million annually (Aquaculture.govt.nz, n.d.-f). The salmon are hatched in land-based hatcheries and then grown in sea netting cages of around 18,000 cubic metres covering a space of about 1.5 hectares. In comparison to much of the farmed salmon from Chile and elsewhere, these salmon are more sustainable and healthy for consumers. This is because the salmon are fed in New Zealand without use of antibiotics or chemical treatments. This practice is possible due to low stocking densities, the absence of salmon parasites and diseases and location in areas that are flushed regularly by currents. Furthermore, the ecological impacts (deposition of organic waste) are highly localised and reversible (same citation) (Aquaculture.govt.nz, n.d.-h).

Pacific Oysters came to New Zealand from Asia accidentally. Oyster farmers, who had been raising the native rock oysters since 1960, discovered that Pacific

Oysters grow faster and production was more predictable. Consequently, since the 1970s most oysters farmed in New Zealand are Pacific Oysters. Oysters are grown on sticks, in netting bags or in trays, mostly on intertidal farms but also in deeper waters using the long line technique much the same as with Greenshell™ Mussels. The oysters are mostly grown in bays and harbours of the North Island, but also in Marlborough (Aquaculture.govt.nz, n.d.-g).



Plate 4. 1 **Mussel Farms in New Zealand (Ministry of Fisheries, 2008a)**

4.3 Key Stakeholders Involved in Tourism and Aquaculture in the Top of the South

This section describes the role and power of and relationships between key stakeholders in the aquaculture and tourism industry in the Top of the South region through a review of public and private stakeholders and institutions involved in the research, development, and administration of these two sectors (Government of Newfoundland and Labrador, 2005).

4.3.1 Government

There are several government organisations with regional offices that are involved in tourism (6) and aquaculture (6) industry policy and management in the case study region (Table 4.2).

Table 4. 2 Overview of Government Organisations Directly Involved in Tourism and Aquaculture in the Top of the South

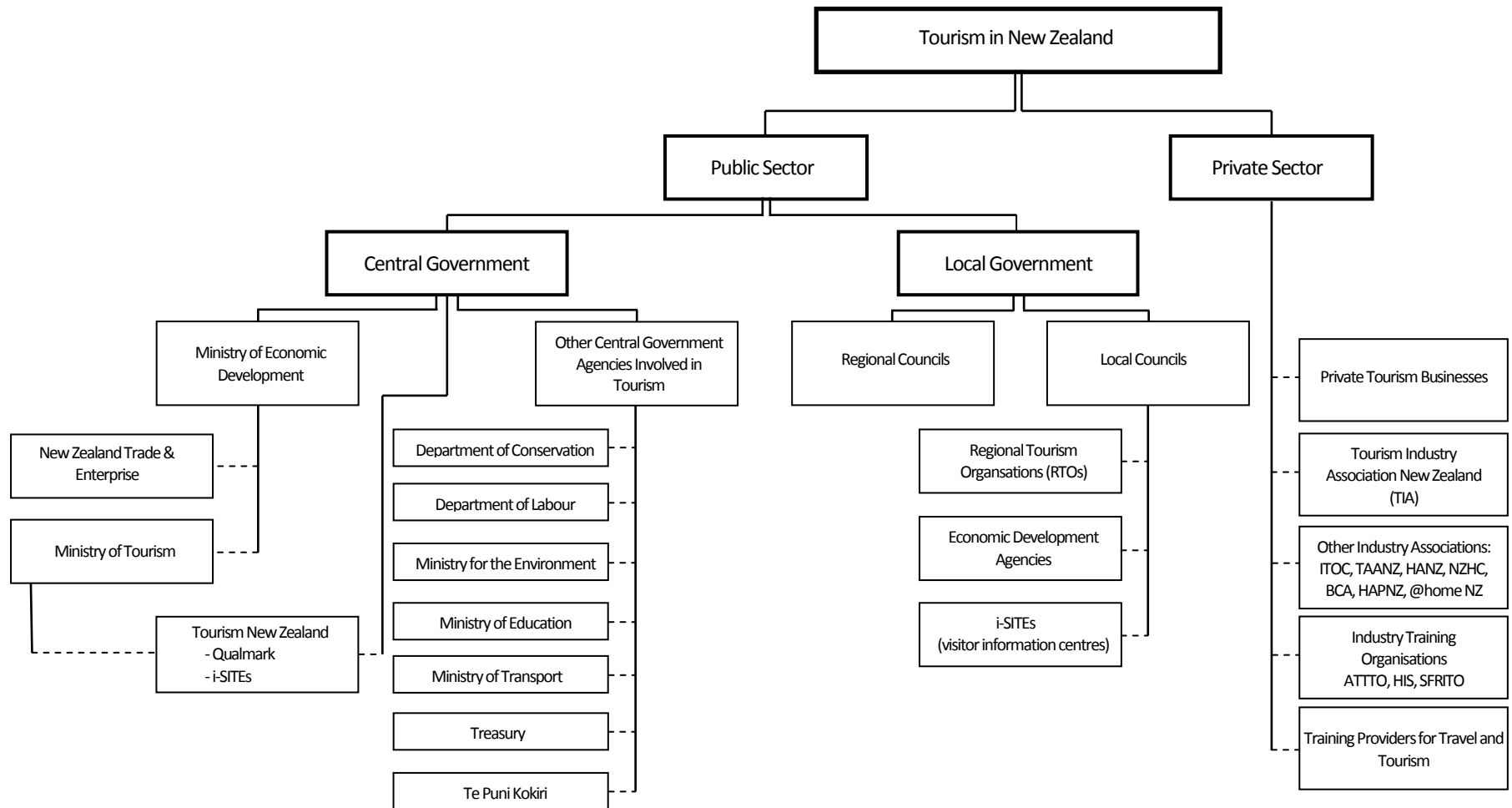
Business / Key Stakeholder	City / Region	Authority
Tasman District Council	Richmond / Tasman	Tourism & Aquaculture
MFISH	Nelson	Aquaculture & Commercial Fisheries
Nelson City Council	Nelson	Tourism & Aquaculture
Nelson/Marlborough Conservancy Office	Nelson	Tourism & Aquaculture
Marlborough District Council	Blenheim / Marlborough	Tourism & Aquaculture
Department of Conservation	Picton / Marlborough	Tourism & Aquaculture
Ministry of Tourism	Wellington	Tourism

In the following sections the role and relationships of the different government and private organisations at national and regional level are described in more detail.

Tourism Organisations and Structure in New Zealand

Tourism in New Zealand is divided into public and private sectors. The private sector is represented by five main parties: tourism businesses, Tourism Industry Association NZ, industry training organisations including training providers for travel and tourism, and other industry associations. The public sector can be divided into local and central government. The central government is represented by the Ministry of Economic Development, Tourism New Zealand and other agencies. The local government is represented by regional and local councils. Important relationships within New Zealand's tourism industry are displayed in the Figure 4.3 (Tourism Industry Association New Zealand, n.d.-b).

Figure 4.3 The Shape of Tourism in New Zealand



According to the Tourism Industry Association there are six main organisations that support, control and guide the sustainable development of tourism in the country (Tourism Industry Association New Zealand, n.d.-a):

1. **The Ministry of Tourism** is the government tourism organisation based in Wellington. It is responsible for policy advice on government investments in tourism, working with other government departments on key tourism policy issues, providing tourism research and statistics, administering tourism facility grants and assisting in major events. The Ministry of Tourism Research Website has been providing free tourism research and data to the industry since 2006.
2. **Tourism New Zealand (TNZ)** is the national tourism organisation. By receiving \$69 million of the annual Government budget they are responsible for the international marketing of the country and are also based in Wellington.
3. **30 Regional Tourism Organisations (RTOs)** are responsible for the domestic and international marketing of their region. These bodies are local government funded. The case study site covers two RTOs: Latitude Nelson and Destination Marlborough (Ministry of Tourism, 2008a).
4. **The Visitor Information Network (i-SITE)** covers the whole country with a presence at over 80 locations. They provide visitors (up to 900,000 international visitors yearly) with comprehensive destination information and a country-wide booking service for transport, attractions, activities and accommodation. There are four i-SITEs in the case study region: Golden Bay (Takaka), Nelson, Blenheim and Picton (New Zealand, n.d.).
5. **Qualmark** is the official mark of quality that identifies trustworthy and professional businesses (accommodation, activities, attractions, transport). The quality assurance programme is a joint venture of the NZ Automobile Association and Tourism NZ supported by the Tourism Industry Association. There are 188 operators that are Qualmark licensed in the case study region. Operators are comprised of predominantly accommodation, but also 24

businesses related to tourism and water such as cruises, charters, eco-tours, kayaking, water taxis, and a salmon farm (Qualmark, n.d.).

6. There are three main **Industry Training Organisations** (ATTTO; Hospitality Standards Institute; Sport, Fitness, Recreation Industry Training Organisation) that ensure national industry qualifications and service standards. Furthermore the Nelson Marlborough Institute of Technology (NMIT) offers several certificates, diplomas and degrees that include the travel and marine sectors (Nelson Marlborough Institute of Technology, n.d.).

In addition to these organisations the **New Zealand Māori Tourism Council** was established in August 2004. The council provides a supportive network for the development of its 13 Māori Regional Tourism Organisations (MRTOs). MRTOs are regional groups of Māori tourism operators focusing on cooperation among members, educating, and representing those involved in RTO activities (Tourism New Zealand, n.d.). The MRTO Te Ara A Maui is responsible for central New Zealand including Tasman, Nelson and Marlborough. In the case study region the following five operators are members of Te Ara A Maui: Abel Tasman Kayaks and Abel Tasman Aqua Taxi in Marahau, Coastal Merchant in Nelson, Myths & Legends Eco Tours in Picton, and Top of the South Experience in Onauku (Te Ara a Maui o Aotearoa, n.d.).

Tourism and Sustainability

The success of New Zealand's tourism industry relies heavily on its unique natural environment, which is the main attraction for international and national tourists. The high number of visitors (2.418 million international visitor arrivals for the year ending in May 2009) (Ministry of Tourism, 2009a) could potentially result in negative environmental impacts. Recognising this problem the Ministry of Environment and the Ministry of Tourism started the "Environmentally Sustainable Tourism Project" in 2005. The project aims to sharpen the awareness of communities, businesses and tourism operators regarding environmentally sustainable practices. The project focuses on finding an equitable balance between the various concerns (Ministry for the Environment,

n.d.; New Zealand Trade and Enterprise, May 2005). The recently established Sustainable Tourism Advisors in Regions (STAR) programme between Marlborough and Wellington supports this approach. The alliance intends to assist willing local operators to identify and support their sustainable performance (Tourism Resource Consultants, 2009).

The Ministry for the Environment, through the Department of Conservation (Doc), also established the regional sustainable tourism charter programme dedicated to supporting ecologically-minded practices in certain regions of New Zealand. In the Top of the South, Enterprise Northland, Tourism Bay of Plenty, Destination Rotorua (North Island) and Lake Wanaka Tourism, Latitude Nelson, Venture Southland/Destination Fjordland (South Island) as well as regional and local authorities, iwi representatives and tourism operators are collaborating (Nelson New Zealand, n.d.-c).

Aquaculture and Fishery Structure in New Zealand

Since 1970 the New Zealand aquaculture industry and – consequently – the competition for space for aquaculture grew rapidly. Māori received income from the fisheries related settlement (e.g. quota allocation) which allowed them to invest in tourism in the region and purchase. Today Māori also own approximately 50% of the fishing quota (New Zealand Seafood Industry Council Ltd., 2009).

Despite the efforts to revise and improve aquaculture policy, the current process for approving new farms is still too complex, takes an excessive amount of time, is considered costly for marine farmers and is inhibiting sustainable economic growth (i.e., no new marine farms have been created since the 2004 aquaculture reform) (Smith, 2008). For this reason, the resource management legislation is again under review. Aquaculture also is often criticized for its visual and environmental impact. The result is a drawn out approval process as a result of public protest (World Fisheries Trust, 2008).

The New Zealand Government is committed to aquaculture development. Chief executives of the resource management agencies involved in aquaculture participate in the development of aquaculture, and aquaculture initiatives that

are implemented by a government team. The National Aquaculture Position Statement, developed by the New Zealand Government, covers the principles for aquaculture development, including: maximising economic benefits, stewardship, promoting innovation, Māori participation, and good governance (Ministry of Fisheries - Te Taitiaki i nga tini a Tangaroa & Aquaculture New Zealand, June 2008). Additionally there is an Aquaculture Implementation Team composed of staff members across the agencies and representatives of the industry, Māori and local government (Aquaculture.govt.nz, n.d.-d).

The objective is to build the basis for maximum sustainable growth, while meeting international, national and regional expectations for environmental, economic and social performance (Ministry of Fisheries - Te Taitiaki i nga tini a Tangaroa & Aquaculture New Zealand, June 2008).

The key stakeholders involved in the aquaculture and fishery industry are the Ministry of Fisheries, the Department of Conservation, the Ministry for the Environment for Coastal Marine Aquaculture and the Ministry of Māori Affairs.

The main body controlling aquaculture in New Zealand is the **Ministry of Fisheries (MFish)** of the multitudes of Tangaroa. The ministry is involved in managing the process for access to or allocation of fisheries. It has to ensure that laws and regulations are applied to control the sustainable use of New Zealand's fisheries resource and marine environment (Ministry of Fisheries, 2007). MFish has an office based in Blenheim and a regional office in Nelson (Ministry of Fisheries, 2009) with an agency representative responsible for aquaculture management.

MFish has a large role in terms of implementing the Resource Management Act 1991 and the Aquaculture Reform Act 2004. The Ministry controls the national registry of fish farmers and consults with authorities involved in the management of fisheries resources (Ministry for the Environment, 2008a).

The Ministry for the Environment advises the New Zealand Government in environmental and international matters that affect the environment. The Ministry holds a leadership role in sustainable development and provides

direction through national environmental standards, policy statements and other regulations.

The Ministry works closely with government agencies and local governments in terms of environmental management (Ministry for the Environment, 2008b). To ensure the sustainability of marine resources the industry follows the Environmental Codes of Practice, ensures good marine farm management, funds regional water quality agencies, collaborates with the NZ Food Safety Authority and Biosecurity NZ and fosters Māori and community involvement (Aquaculture New Zealand, 2008).

The Department of Conservation (DoC) is tasked with conservation management in various regions throughout New Zealand. As a central government agency its obligation is to report to the Minister of Conservation about its duties in preservation of New Zealand's natural heritage. There are 13 conservancy offices in New Zealand and two additional regional offices. Each conservancy is the umbrella organisation for several area offices.

The New Zealand Government seeks to balance consumption with environmental protection and preserving biodiversity through the Fisheries Act 1996, various rules and regulations, and the Quota Management System (rights-based fishing allocation) administered by the Ministry of Fisheries (Ministry of Fisheries, n.d.).

In terms of marine and coastal conservation, DoC is responsible for marine reserves, marine mammals (dolphins, sea lions, fur seals, and whales), in dangerous species, the administration of whale and dolphin-watching industry regulations, and the NZ Coastal Policy Statement. For these reasons DoC is actively involved in coastal management, commercial fishing, aquaculture reform, marine reserves and other protected areas, and the foreshore and seabed (Department of Conservation, n.d.-a).

The Nelson/Marlborough Conservancy headquarters is based in Nelson. It is divided into five areas: South Marlborough, Motueka Sounds, St Arnaud, and Golden Bay. On behalf of the public, DoC looks in large part after the

Marlborough and Nelson region including Nelson Lakes National Parks and Mt Richmond Forest Park, Kahurangi, Abel Tasman, and Molesworth Station, nature reserves such as Farewell Spit and Stephens Island, and the three marine reserves of Westhaven (536ha), Horoirangi (904ha) and Tonga Island (1835ha) (Department of Conservation, n.d.-b; Department of Labour, n.d.).

Because of its economic and cultural importance to New Zealand, the aquaculture sector works in conjunction with the Ministry of Fisheries to coordinate coastal planning, environmental management and customary rights. Government representatives such as the Ministers of Fisheries, Economic Development, Local Government, Māori Affairs, Conservation, and Environment meet on a regular basis to discuss aquaculture issues (Aquaculture.govt.nz, n.d.-c).

The transfer of more responsibility to regional and local government by the 2004 Aquaculture Reform Act, emphasises the importance of collaboration with communities, government, iwi, science and training providers and the industry (Marlborough Regional Development Trust, 2004; New Zealand Aquaculture Council, 2006).

Research and Development

Research and Technology (R&T) is a main driver for New Zealand's sustained prosperity. The largest investments in research and innovation are administered by the New Zealand government. In 2006, \$1.02 billion was committed to research (Ministry of Research Science and Technology, 2007a).

The main bodies involved in New Zealand's R&T policy are:

- The Ministry of Research, Science & Technology (MoRST)
- Foundation for Research, Science & Technology (FRST)
- Health Research Council of New Zealand (HRC)
- Royal Society of New Zealand (RSNZ)
- New Zealand Venture Investment Fund Ltd (NZVIF).

In 1992, the Government created nine Crown Research Institutes (CRIs). These will be described in the R&D Institutions section later in this chapter.

New Zealand's research network with the United States, the European Union and scientific relationships with China, Germany and Japan are of high importance. New Zealand is active in the Asia-Pacific Economic Cooperation's (APEC) RS&T forum, and OECD science committees for business and knowledge sharing (Ministry of Research Science and Technology, 2007a).

4.3.2 Communities and Regional Development Agencies

The Top of the South is governed by three regional councils: the Tasman, Nelson and Marlborough Region (Figure 4.4) (Department of Internal Affairs, n.d.; Ministry of Tourism, 2008a).

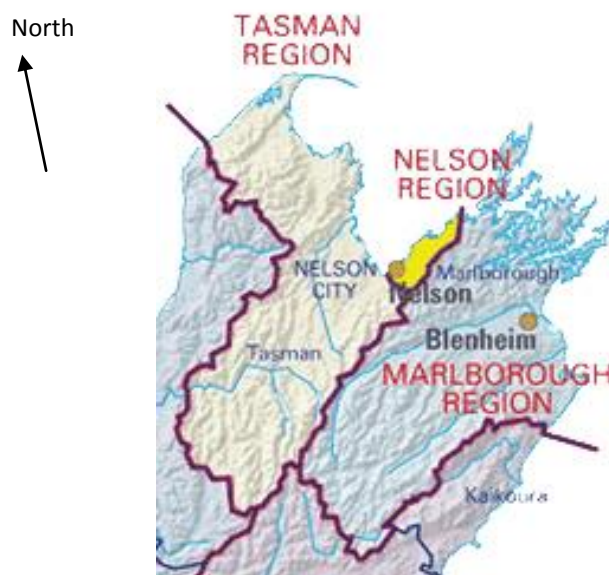


Figure 4. 4 Map of the Three Regional Councils of the Case Study Region((Terralink International Limited, 2006)

The 'Top of the South' covers nearly 28,000 square km and has a resident population of about 130,000 (Table 4.3) (Department of Labour, 2008).

Table 4. 3 Top of the South Size and Population (2008)

The Top of the South	Marlborough	Nelson	Tasman
Geographical Size	17,517 sq km (incl. 12 mile marine boundary)	444 sq km	9786 sq km
Population	42,558	42,888	44,625
Māori	4,275	3,615	3,063

The main central city in Marlborough is Blenheim (population 28,200) (Destination Marlborough, 2007). The port in Picton (population 3,700) links to the Cook Strait, connecting the North and South islands of New Zealand by ferry, and is a popular entry point for domestic and international tourists visiting the South Island. Havelock, Rai Valley, the Sounds and the Mt Richmond Forest Park are also part of the district (Marlborough District Council, n.d.-a, n.d.-b). All of these communities are essentially connected by a single main highway.

An increasing number of people are settling in Marlborough for its environment and lifestyle. The growth of the technology-based sector and consultancy are contributing to this trend (Wine Marlborough New Zealand, n.d.). As a result, property values and tax rates have increased. Many pastoral farms have become financially unviable and most have been sold or changed into vineyards (Marlborough Online, n.d.-b).

With more than 2,500 sunshine hours per year, Nelson has one of the most pleasant climates of the country, and is the 10th most populous city and geographical centre of New Zealand (APR Consultants, n.d.; Nelson Regional Economic Development Agency, 2005). Surrounded by mountains and Tasman Bay it has become a centre for adventure and ecotourism.

The Tasman District includes settlements from Pakawau in the very north to Murchison and St Arnaud in the south. The Council offices are based in Richmond, and with a population of 11,000 it is the biggest urban settlement of the district (Tasman District Council, 2006a).

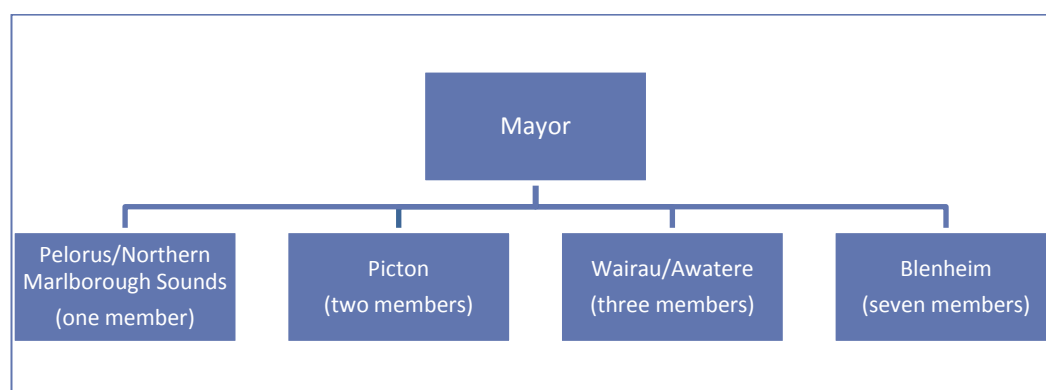
The three District Councils are unitary authorities and are therefore in charge of all issues concerning the territorial authority and Regional Councils (Marlborough District Council, n.d.-a). An extract from the Local Governance Statement (June 2007) summarises the role of district/city council and regional council specifically for resource-, tourism-, and aquaculture- (AMAs) management:

Table 4. 4 District/City/ and Regional Council Activities

Activities	District/City Council	Regional Council
Environmental consents and policy (RMA)	Land use and development	Air, water and coastal management
Community facilities	Funds and operates	Funds
Parks and reserves	Local reserves, playgrounds	Regional parks and tracks
Libraries, museums and galleries	Funds and operates	Funds
Roading and transport	Local roads, footpaths, street lightening	Planning and funding public transport
Transport planning	Local planning, road safety works and parking services	Regional land transport strategies, harbour master functions
Environmental functions & regulations	Animal control, building control, environmental health, liquor licensing	River control and management, water use, air and water quality
Biodiversity	Reserve management	Pest control and management
Community development	Fosters community development and provides grants and advice	Some community grants
Economic development	May provide local economic development and tourism promotion	May provide regional economic development
City/town improvements	Designs and funds amenities	

Even though the responsibilities and duties of the three councils are generally the same, their organisational structure differs and is described in the following.

The Marlborough District Council was established under the Local Government Act 2002. The council represents the wards by electing 13 councillors for the Marlborough District (Figure 4.5) (Marlborough District Council, 2007, p. 7):

**Figure 4. 5 Election of Councillors on Ward Basis**

Council meetings are held to regulate the delegation of functions and actions of the twelve committees that are listed in Table 4.5 (Marlborough District Council, 2007):

Table 4. 5 Marlborough District Council Committees

<ul style="list-style-type: none"> • Assets and Services Committee • Environment Committee • Grants Sub-Committee • Civil Defence Emergency Management Group • Māori Advisory Komiti • Regional Land Transport Committee • Animal Control Sub-Committee 	<ul style="list-style-type: none"> • Community and Financial Planning Committee • Marlborough Regional Forestry Committee (Joint Committee with Kaikouras District Council) • Sister City Sub-Committee
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The Nelson City Council established several committees and subcommittees to manage its duties:

Table 4. 6 Nelson City Council Committees

<i>Nelson's Committees</i>	
<ul style="list-style-type: none"> • Hearing Panel • Community Services • Infrastructure 	<ul style="list-style-type: none"> • Governance • Environment
<i>Nelson's Subcommittees</i>	
<ul style="list-style-type: none"> • Founders Heritage Park • Civil Defence Emergency Management Group 	<ul style="list-style-type: none"> • Audit Committee • Remuneration Review Committee • Nelson Central Relief Fund

The Tasman District Council is divided into the four main departments:

Table 4. 7 Tasman District Council Departments

<ul style="list-style-type: none"> • Community Services • Corporate 	<ul style="list-style-type: none"> • Engineering Services • Environment & Planning
---	--

The Council has several standing committees and subcommittees, and three Community Boards.

Table 4. 8 Tasman District Council Committees

<i>Standing Committees</i>	
● Full Council	● Engineering Services Committee
● Community Services Committee	● Consent / Commissioner Hearings
● Corporate Services Committee	● Environment and Planning Committee
<i>Subcommittees</i>	
● Council Enterprises Subcommittee	● Heritage Subcommittee
● Audit Subcommittee	● Communications Subcommittee
● Creative Communities Subcommittee	● Community Board Delegations Subcommittee
● Grants and Community Facilities Rate	● Representation Review Subcommittee
<i>Community Boards</i>	
● Golden Bay Community Board	● Tasman Regional Transport Committee
● Motueka Community Board	

The Nelson Tasman Region

There is strong collaboration between the Nelson City Council and the Tasman District Council. Together they agreed on a portal tourism website www.nelsonnz.com and represent themselves as the Nelson Region (Nelson City Council, 2008).

To manage the combination of regional and local council responsibilities, both councils are structured as described in the following:

There are five Council Controlled Trading Organisations (CCTOs) with the intention of making profit, seven Council Controlled Organisations (CCOs) that are controlled 50% by a local authority, and several Council Organisations (COs) that are controlled by one or more local authorities with any proportion of voting rights or the rights to appoint a trustee/director. All organisations are listed in Table 4.9 (Nelson City Council, 2009).

Table 4. 9 Nelson Tasman Region's Council Organisations

<i>Council Controlled Trading Organisations (CCTOs)</i>	
• Company Shareholders – all companies	• Nelmac Ltd
• Nelson Airport Ltd.	• Tourism Nelson/Tasman Ltd
• Stoke Heights Joint Ventures	
<i>Council Controlled Organisations (CCOs)</i>	
• Abel Tasman Gateway Trust (Natureland)	• Cawthron Institute Board
• Arts Council Nelson	• Community and Whanau Group
• Bishop Suter Trust Board	• Kahurangi Employment Trust
• Broadgreen Society	
<i>Council Organisations (Cos)</i>	
• Abel Tasman Gateway Trust (Natureland)	• Nelson Youth Council
• Arts Council Nelson	• Safer Community Council
• Bishop Suter Trust Board	• Sport Tasman Trust
• Broadgreen Society	• Tahunauni Beach Holiday Park
• Cawthron Institute Board	• Talking Heads
• Community and Whanau Group	• Top of the South Scenic&Heritage Trails Trust
• Kahurangi Employment Trust	• Trustpower community awards
• Melrose Society	• Whakatu Marae
• Nelson 2000 Trust	• Youth and Community Facilities Trust (The New Hub)
• Nelson Marlborough Seafood Cluster	• Youth Matters Group
• Nelson Provincial Patriotic Council	• Youth Nelson
• Nelson Tasman Business Trust	

Overall there are 37 council committees, 35 COs and four council departments in the Top of the South. The different organisational structure of the three authorities could complicate communication and be a hindrance to cooperation within the area as a whole. While Nelson and Tasman are trying to achieve collaboration especially in the tourism industry, no direct connection to the Marlborough District Council appears to exist (Nelson City Council, 2009).

4.3.3 Business Support Organisations and Associations

A number of business support organisations and associations involved in the tourism (10) and aquaculture (6) industry are based in the case study region (Table 4.10).

Table 4. 10 Overview of Stakeholders Involved in Tourism and Aquaculture in the Top of the South

Business / Key Stakeholder	Region	Type
Tasman Region		
Golden Bay i-SITE Visitor Centre	Golden Bay/Takaka	Tourism
Nelson Region		
Aquaculture New Zealand Ltd	Nelson	Aquaculture
Latitude Nelson	Nelson	Tourism
Wakatu Incorporation	Nelson	Tourism & Aquaculture
Nelson i-SITE Visitor Centre	Nelson	Tourism
Marlborough Region		
Marine Farming Association	Blenheim	Aquaculture
Marlborough Regional Development Trust	Blenheim	Tourism & Aquaculture
Destination Marlborough	Blenheim	Tourism
P.A.L.M.S.Ltd Property and Landmanagement Services Ltd	Blenheim	Tourism & Aquaculture
Blenheim i-SITE Centre	Blenheim	Tourism
Picton i-SITE Centre	Picton	Tourism
Port Marlborough New Zealand Limited	Picton	Tourism
Wellington		
SeaFIC	Wellington	Aquaculture

Close cooperation between commercial and community stakeholders in planning and decision-making is also an important starting point to conserving natural resources for the future generations while simultaneously enabling operators, businesses and regions as a whole to profit from economic viability. Larger businesses have a greater financial capacity to transform and amend their activities towards sustainability while small/medium sized enterprises (SMEs) need more support and time. The capability of SMEs can be enhanced through the building of new partnerships between businesses and regions to share costs and expertise (New Zealand Trade and Enterprise, 2005).

As a means to define the regional capacity for innovation, the role and relationships of the different stakeholders on national and regional level are described in more detail.

The Tourism Industry

The case study site includes two out of 30 Regional Tourism Organisations: Latitude Nelson and Destination Marlborough (Ministry of Tourism, 2008a). Their main responsibility is marketing their respective regions nationally as well as internationally.

Destination Marlborough operates i-SITEs in Blenheim and Picton. Latitude Nelson has an i-SITE in the city of Nelson and Motueka is home of the i-SITE responsible for the Abel Tasman National Park. Aside from offering information about their area, they also provide booking services for attractions, transport and accommodation. These are local private councils which charge for display of brochures or marketing of attractions.

There are two main organisations representing the case study region: **Latitude Nelson** unifies the Nelson and Tasman Region whereas **Destination Marlborough** represents the Marlborough region. Both organisations follow the approach of providing an overview of the local attractions and offer accommodation, travel and transport information. By linking the different businesses of the region they provide a platform on the one hand for the local industries to advertise themselves and on the other hand for locals and visitors to the region who plan their day- and holiday-trips in the Top of the South (Destination Marlborough, 2007; Nelson New Zealand, n.d.-d).

Founded in 1999, the **Marlborough Regional Development Trust (MRDT)** supports sustainable development of the region in various aspects. The community based charitable trust works to optimise the use of resources. Based in Blenheim they support networking and collaborative partnerships of regional organisations. Seven independent board members represent the organisation that supports the economic, collective health and general positive development of the region (Marlborough Regional Development Trust, n.d.-b).

The Aquaculture Industry

The importance of the aquaculture industry is also reflected in the New Zealand Aquaculture Strategy that was commissioned by the New Zealand Aquaculture Council, supported by the Ministry of Economic Development and the New Zealand Seafood Industry Council in July 2006 (New Zealand Aquaculture Council, 2006; New Zealand Mussel Industry Council Ltd., 2006). The strategy is the result of collaboration between representatives from the seafood industry, government departments, iwi, local and regional governments, NGOs and research providers. A key outcome is the introduction of a ten-point plan that provides a framework for the sustainable development of the industry's growth to achieve equivalency with the New Zealand wine industry by producing \$1 billion of product by 2025. The strategy covers the following ten points:

- Establish a new national sector organisation
- Strengthen the partnership with government
- Strengthen other stakeholder partnerships
- Secure and promote investment in aquaculture
- Improve public understanding and support for aquaculture
- Promote Māori success in aquaculture
- Develop the market for New Zealand aquaculture products
- Maximise opportunities for innovation
- Promote environmental sustainability and integrity for aquaculture
- Invest in training, education and workforce promotion (New Zealand Aquaculture Council, 2006).

With the support of \$70,000 from the Government and \$50,000 from the Seafood Industry Council (SeaFIC), New Zealand Aquaculture Ltd was established in 2006 and hence fulfilled the first point of the NZ Aquaculture Strategy; establishment of a new national sector organisation as identified in the strategy (NZPA, 2006).

The main regional development organisation in the aquaculture industry is **Aquaculture New Zealand** which was created in 2007. It consolidates the mussel, oyster and salmon farmers, and represents their interests at local,

regional and central government levels in New Zealand. Additionally Aquaculture NZ is implementing research strategies for future development and growth of the industry (Aquaculture New Zealand, 2008).

The aquaculture industry has representatives at various levels under the umbrella of New Zealand Aquaculture Limited consisting of delegates from the four main species groups (Salmon, Abalone, Mussels, and Oysters). There are also associated organisations with a particular interest in the aquaculture industry at a local or national level. These organisations hold non-voting observer status (Figure 4.6) (Marine Farming Association, n.d.-b).

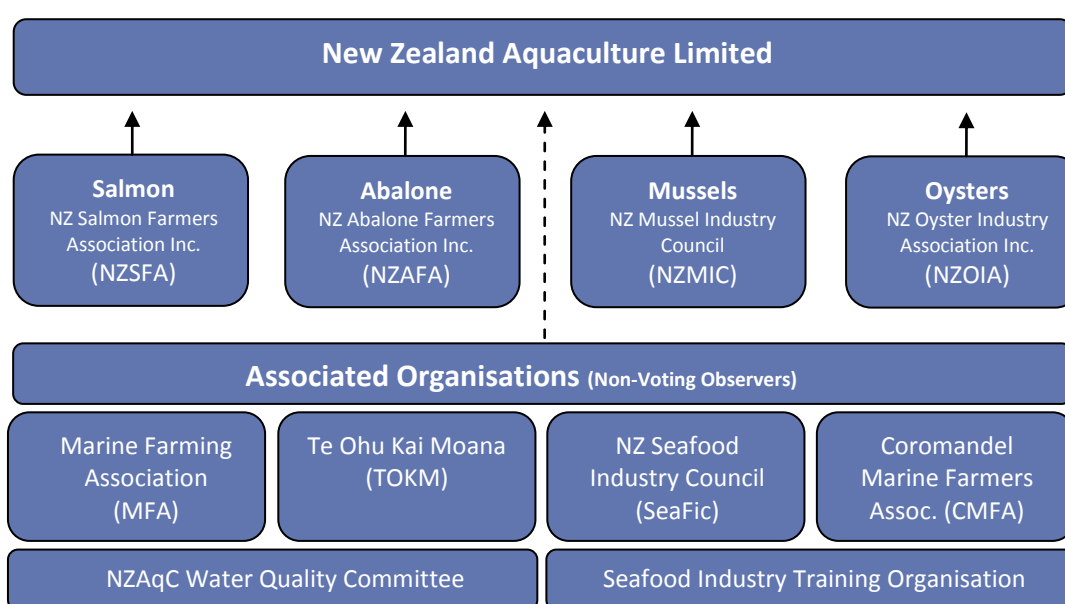


Figure 4. 6 Aquaculture Industry Structure

A short summary of organisations involved in the aquaculture industry structure shown above is provided to illustrate level of involvement and relationships.

Aquaculture New Zealand is a united body including the four major species groups: NZ Salmon Farmers Association Inc., NZ Abalone Farmers Association Inc., NZ Mussel Industry Council, and NZ Oyster Industry Association Inc, with its head office in Nelson (NZPA, 2006). This organisation is funded primarily by industry levy and engages in research and development with focus on the role of Māori in the industry's future (Aquaculture New Zealand, 2009).

Associated organisations representing various interests in the Top of the South are summarised below.

Marine Farming Association Inc. (MFA) was established in 1974 as the Marlborough Sounds Marine Farming Association representing marine farmers in the top of the South Island. Nowadays it has 121 ordinary members, 42 Associate members and three life members and owns five spat catching and eight spat holding farms in the Marlborough Sounds; an area that grows 80% of marine products in NZ and exceeds approximately NZ\$ 200 million in sales of their products. The MFA is a subscription- based organisation, its responsibility is to foster, promote, aid, encourage, advance and develop the interests and rights of its members and the marine farming industry in general (Marine Farming Association, n.d.-a).

Te Ohu Kaimoana represents the interests of iwi with a focus on future advancement of the marine environment including fishing, fisheries and related activities. The Māori Fisheries Act established Te Ohu Kaimoana in 2004 with the aim to observe the operations of Aotearoa Fisheries Ltd, Te Wai Māori Trust, and Whakatupu Trust. Its task is to assign fisheries assets held in trusts based on the Māori Commercial Fisheries Settlement (1989 and 1992), classify new quota shares, and to offer advice to its members (Te Ohu Kaimoana, n.d.).

The New Zealand Seafood Industry Council Ltd. (SeaFIC) works for the industry and is owned by industry. The New Zealand seafood industry includes aquaculturists; fishermen; fisheries management organisations; family-owned, listed and joint venture seafood companies and retailers; altogether there are 2,500 participating enterprises that are owned by SeaFIC. The council is based on four business units: The Science Group, The Policy Group, The Industry Training Organisation (ITO), and The Trade and Information Group. Trade and Information also includes three departments: Trade and International Policy, The Information Centre, and The Seafood Standards Council. In general SeaFIC concentrates on “shaping policies and the industry's regulatory framework, lobbying for surety of access to fisheries, reducing tariffs, working co-operatively on fisheries management and environmental issues, and providing

an avenue for funding for scientific research and value-added innovation” (The New Zealand Seafood Industry Council Ltd., n.d.-a).

The main stakeholders of the New Zealand seafood industry include Rights Owners, Commercial Stakeholder Organisations (CSO’s), and the New Zealand Seafood Industry Council – Figure 4.7 illustrates these stakeholders (The New Zealand Seafood Industry Council Ltd., n.d.-d).

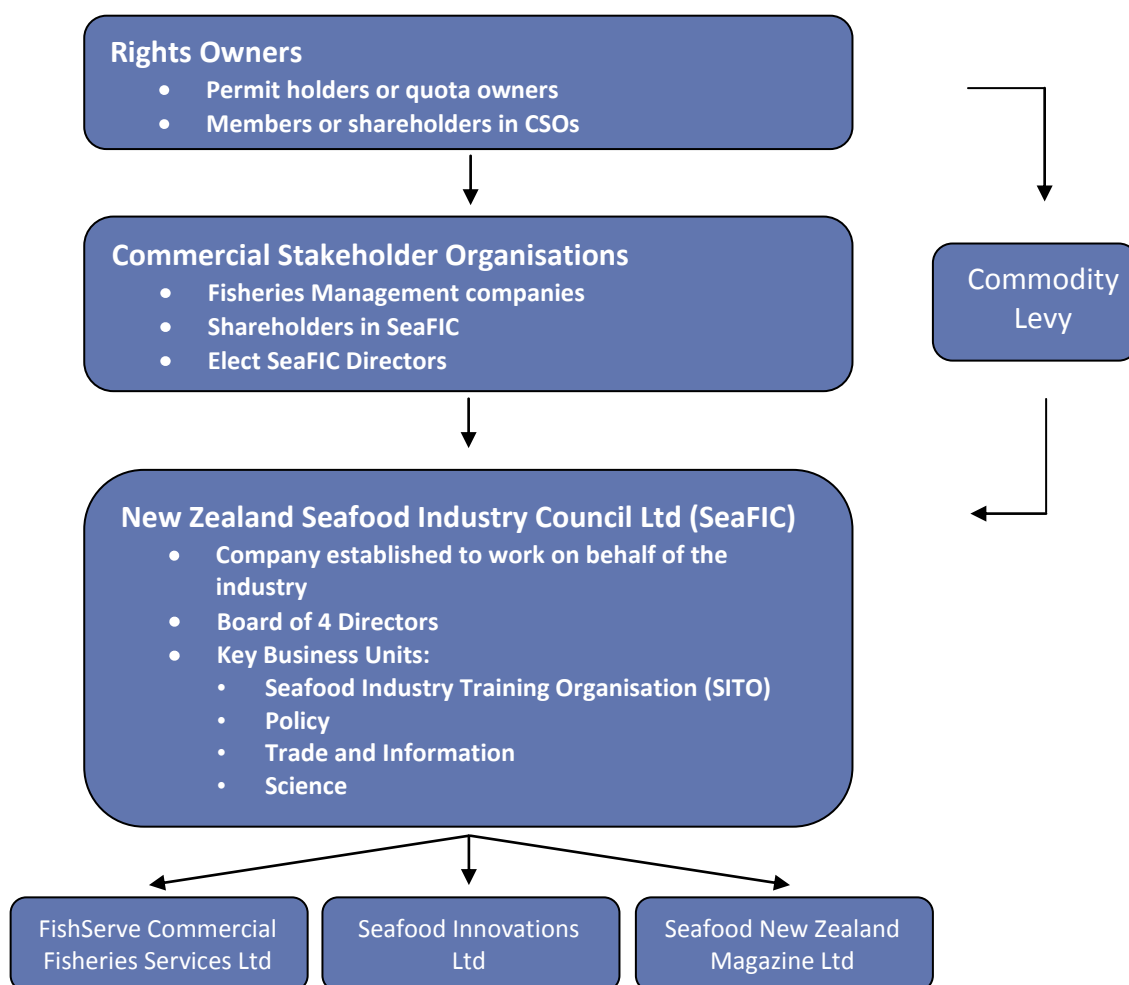


Figure 4. 7 Structural Diagram of the NZ Seafood Industry

The Commodity Levy is used to fund the NZ Seafood Industry Council work and funds CSO projects. (The New Zealand Seafood Industry Council Ltd., n.d.-b).

Commercial Fisheries Services (CFS) is a wholly owned subsidiary of SeaFIC that was established in 1999 with its trading name FishServe. Fifty employees based in Wellington offer administrative services to the NZ commercial fishing industry in support of the 1996 Fisheries Act. Additionally its subsidiary, FINNZ,

has been providing consultation in terms of service delivery with business systems, process, and operational aspects since 2003 (FishServe, n.d.).

There are also some significant public action groups including Friends of Nelson Haven and Tasman Bay Inc. and Golden Bay Marine Farmers Consortium Ltd who have engaged in making public comment and lawsuits related to decision-making about AMA's, resource consents, and other coastal zoning issues.

Education and Training Institutions

There are three main education and training institutions throughout New Zealand that are offering qualifications related to the aquaculture and tourism industry and are available to the region. These are described in the following.

Founded in 1965, **Queen Charlotte College** is based in Picton. In collaboration with the MFA, the college is the first offering an Aquaculture Academy in New Zealand. Since 2005, the Academy has been offering courses at year 11, 12 and 13 leading to qualifications in the aquaculture industry. Dive and boating qualifications are also offered. With 400 students, a sister school in Japan and hosting international students, the college is supported by the Marine Farming Association (Queen Charlotte College, n.d.).

The Seafood Industry Training Organisation (SITO) is the training organisation for the seafood industry in New Zealand. Offering high standards for seafood industry skill development, SITO links the seafood industry and the Tertiary Education Commission (TEC) by providing training in five sectors: Aquaculture, Fishing and Vessel operations, Wholesale and Retail, Seafood Processing and Seafood Māori. Based in Wellington, SITO receives funding from the New Zealand Industry Council and TEC (Seafood Industry Training Organisation, n.d.).

The **Aviation, Tourism and Travel Training Organisation (ATTTO)** is an industry training organisation offering qualifications for the Aviation, Travel, Tourism and Museum industries. Established in 1994, the role of ATTTO is to set national skill standards, develop, arrange and monitor training programmes, and provide industry leadership. Today the organisation has 4,500 trainees in more than 460 businesses in New Zealand (Aviation Tourism and Travel Training Organisation,

n.d.). Furthermore qualifications for the aquaculture industry are offered by the Queen Charlotte College in Picton (n.d.) and the Nelson Marlborough Institute of Technology (Nelson Marlborough Institute of Technology, n.d.).

4.2.4 R&D Institutions

In 1992, the Government created nine Crown Research Institutes (CRIs) which are today the country's largest providers in terms of science research along with a number of universities. The work done by the CRIs includes technology research and development, as well as basic and applied science. Funders and clients are local and central government, and also national and international private sector markets (Ministry of Research Science and Technology, 2007b).

Two out of the nine CRIs are relevant to aquaculture and its products and represent two major aspects of the supply chain- 1) physical and ecological aspects of marine farming and its impacts and developmental fisheries (NIWA) and 2) science related to seafood product development (Crop and Food).

The National Institute of Water & Atmospheric Research (NIWA) was founded in 1992 as one of the nine CRIs. NIWA delivers science services via 13 National Centres. Out of six regional offices in New Zealand, the one based in Nelson is specialised in inter alia climate research; shellfish harvesting; fisheries stock assessment; marine reserves and coastal resource surveys; assessment of environmental effects for resource management, including aquaculture developments; and mussel and scallop spat identification and monitoring (Ministry of Fisheries, 2008c; National Institute of Water & Atmospheric Research, 2008).

Crop & Food Research is a biological science company with five research areas covering sustainable land and water use, high performance plants, personalised foods, high value marine products, and biomolecules and biomaterials. Financially supported by local and international industry and government sources they do research on the Australian and New Zealand side of the Tasman Sea. This collaborative research provides intellectual property supporting business development and innovation in food and its production. Out of nine

locations in New Zealand, the Seafood and Marine Extracts division is based in Nelson (Crop and Food Research, 2008).

Further, New Zealand has eight universities, seven Centres of Research Excellence (CoREs), ten research associations, three Research Consortia (public-private partnerships bringing together end users and researchers), and two non-government bodies focused on research (including the Cawthron Institute) which are contributing to RS&T (Ministry of Research Science and Technology, 2007b).

According to the Ministry of Research, Science and Technology (2007a), the funding is structured to:

- Support basic and strategic research
- Support researcher-led innovation in new areas or applications
- Increase the rate of commercialisation and the ability of firms to commercialise
- Support promising researchers and environmental, social and health research.

As part of the New Zealand Seafood Industry Council the Science group provides research data for the industry to ensure sustainability and profitability of the seafood industry. Based in Wellington they provide consultancy services in fisheries science and management (The New Zealand Seafood Industry Council Ltd., n.d.-c).

Established in 1919, **Cawthron** is a world leading institute undertaking research to protect and restore coastal and freshwater ecosystems. Supported by the Foundation for Research, Science and Technology the Institute provides advice, products and analytical services to support New Zealand's seafood industry and sustainable management of the coastal and freshwater environment. With 180 employees in Nelson and Marlborough the Cawthron Trust Board owns the institute and has initiated a range of education- and science- focused community programmes (Cawthron, n.d.).

Operating since 1996, **New Zealand Clearwater Crayfish (Koura) Ltd.** (NZCC) is a pioneering venture farming New Zealand's freshwater crayfish, koura. Run by the owner of Ormond Aquaculture Ltd (OAL), the venture specialises in salmon farms in fresh water, and resource management consultant who provides 30 years of experience in the fresh water aquaculture industry. Based in Nelson, NZCC is very much involved in the research, development and consulting of farming koura (New Zealand Clearwater Crayfish (Koura) Ltd., n.d.).

4.4 Economic Conditions of the Top of the South

The following section presents a summary of the region's economic conditions as a means to understanding economic sustainability conditions relevant to evaluation of the Trail.

4.4.1 Business

Economic Conditions

The Nelson/Marlborough/Golden Bay region is mainly based on primary industries. Forestry, horticulture, commercial fishing, aquaculture and tourism are the largest sectors. The region benefits from Marlborough being the largest wine producing area (11,153 producing hectares) in New Zealand (Wine Marlborough New Zealand, 2008b). The economy also benefits from the aviation, information technology, engineering technology, manufacturing and building, and art and craft industries, as well as sheep, and cattle farming (Tasman District Council, 2006b).

In 2005, one quarter of the regional GDP in the Tasman District was based on forestry (10%), seafood (9%) and horticulture (8%) (Tasman District Council, n.d.). In the Nelson region alone, aquaculture and tourism generate a combined \$402 million annually (Nelson City Council, personal communication, July 07, 2008). However, reliance on primary products has contributed relatively low growth (0,7% per year 1998 to 2003) to the national GDP in the Nelson Tasman Region (2.3% per year 1998 to 2003) (Tasman District Council, 2005). This is highlighted as fishing operations were limited by reduced quotas (total amount of fish that can be caught in a year), the high NZ dollar and increasing oil prices. High levels of immigration resulted in housing development and good returns

from the primary sector. The property market has been brisk since 2000 in general (Tasman District Council, 2005).

The GDP of Marlborough's industries is not measured consistently. Due to different measurement tools there are few official data available in the Marlborough region especially for the aquaculture industry (Marlborough Regional Development Trust, n.d.-c). However, the economy in Marlborough is mainly focused on primary industries. According to New Zealand's Career Services (Career Services, 2007) 30% of Marlborough's working population is employed by the following industries:

- Agriculture and horticulture (including viticulture)
- Services that support agriculture and horticulture
- Food and beverage
- Manufacturing.

In 2007, those industries earned 23% of the region's income (Ministry of Fisheries, 2008a).

Tourism in the Top of the South (Tasman, Nelson, Marlborough)

There are a number of tourism operations that offer visitors a very unique experience in the Top of the South and are relevant to seafood. Several of these (14) are more directly related to the aquaculture and fishery industries (Table 4.11).

Table 4. 11 Overview of Operators Involved in Tourism and Aquaculture in the Top of the South

Business	Region	Type
Tasman Region		
Anatoki Salmon	Golden Bay/Takaka	Aquaculture & Tourism (Fishing at freshwater salmon farm)
The Mussel Inn	Golden Bay/Takaka	Aquaculture & Tourism (Restaurant offering local seafood)
Nelson Region		
Sealord Shellfish Limited	Nelson	Aquaculture (Factory)
Bar-B-Cruise	Nelson	Aquaculture & Tourism (Restaurant)
Smokehouse	Nelson/Mapua Port	Aquaculture & Tourism (Restaurant offering local seafood)

Saltwater Cafe & Bar	Nelson	Aquaculture & Tourism (Restaurant offering local seafood)
Marlborough Region		
Hunters Restaurant*	Blenheim	Aquaculture & Tourism (Vineyard & restaurant)
KONO New Zealand Aotearoa Seafoods Ltd	Blenheim	Aquaculture & Tourism (Seafood & wine)
Nelson Ranger Fishing*	Picton	Aquaculture & Tourism (Retail/Farm)
Dive Picton	Picton	Tourism (Recreation)
Dolphin Watch Ecotours	Picton	Aquaculture & Tourism (Tour/Recreation)
EcoWorld Aquarium and Terrarium	Picton	Tourism (Aquarium)
Myths & Legends Eco-Tours	Picton	Tourism (Tour)
Marlborough Sounds Adventure Company	Picton	Tourism (Recreation)
The Hairy Mussel*	Picton	Aquaculture & Tourism (Retail Direct)
Windhoek Homestays*	Picton/Waitaria Bay	Tourism (Lodge in Sounds)
Queen Charlotte Wilderness Park	Picton/Cape Jackson	Aquaculture & Tourism (Wilderness Park along the Sounds)
Hopewell	Kenepuru Sound	Aquaculture & Tourism (Lodge/brings guests to M.-Farms)
Sanford Limited*	Havelock	Aquaculture (Aquaculture industry)
He tiki Arts Gallery	Havelock	Tourism (Māori Art Gallery)
Slip Inn	Havelock	Aquaculture & Tourism (Restaurant offering local seafood)
The Brick Oven*	Rai Valley	Aquaculture & Tourism (Restaurant offering local seafood)

*Operators that are part of the MFA Aquaculture and Seafood Trail

In 2006, the international and domestic visitor expenditure in both RTOs was NZ\$ 490.4m. The whole region received 3.06m total visits of domestic and international travellers, 53% were overnight travellers. In the period of 2005/2006 the Marlborough RTO attracted New Zealand's greatest number of international wine tourists with an average of 45,300 wine visitors per year (Ministry of Tourism, 2007).

Table 4. 12 Origin of Guests (Nights spent by guests in commercial accommodation, September 2007 through July 2008)

Total Domestic		Total International	
Latitude Nelson	Destination Marlborough	Latitude Nelson	Destination Marlborough
797,640	384,270	436,050	328,250

Table 4.13 shows the growth rate over year of visitor nights for the region. There is an increase of 5.0% in visitor nights on a national level, whereas the growth rate in the three regions was negative in the March quarter 2007 (APR Consultants, 2007).

Table 4. 13 Regional Level Overview: Visitor Nights

	Tasman Region		Nelson Region		Marlborough Region	
Month/Year	March 06	March 07	March 06	March 07	March 06	March 07
Visitor Nights	335,519	330,000	232,372	241,000	276,500	275,000

Currently there is no exact number that identifies people who travel to the area because of seafood or aquaculture. However, according to the Ministry of Tourism, scenic boat cruises and fishing (sea/river/lakes) were two of the top 30 nature-based tourism activities undertaken by domestic and international tourists in 2006 (Ministry of Tourism, 2008b).



Plate 4. 2 Canoeing and Swimming Next to Mussel Farms in the Marlborough Sounds

Aquaculture and Seafood in New Zealand

In July 2006, the New Zealand Aquaculture Council published the New Zealand Aquaculture Strategy to ensure sustainable development. The strategy was

designed in conjunction with regional and local governments, iwi, government departments, research providers, non-governmental organisations, and all sectors of the seafood industry. The long-term goal is to increase the sale to \$1 billion by 2025 (in 2006 NZ dollars) (New Zealand Aquaculture Council, 2006).

Expansion was slowed down when in November 2001, the Government placed a moratorium on new applications to allow aquaculture reforms to be enacted and for councils to plan for the changes without having to deal with large numbers of new applications (Ministry for the Environment - Manatū Mō Te Taiao, 2003). Two government acts now influence continued expansion. The Aquaculture Reform Act amends several acts relevant to aquaculture and clarifies policy for location of marine farms in Aquaculture Management Areas (AMA's) established by regional councils (Aquaculture.govt.nz, n.d.-a). The Māori Commercial Aquaculture Claims Settlement Act recognises iwi marine farming interests and requires the government to provide iwi with 20 per cent of all new aquaculture space and the equivalent of 20 per cent of space created between 1992 and 2004 (New Zealand Government, 2008). The Aquaculture Reform Act 2004 ended the moratorium and transferred more responsibility to regional and local government which recognises that collaboration with communities, government, iwi, science and training providers and the industry is important. The Act introduced a single process for aquaculture planning and consents and established clearer roles for regional and unitary councils, including responsibilities for managing all the environmental effects of marine farming, including any effects on fisheries and other marine resources (Ministry for the Environment, 2008a). Since introduction, few new permits have been issued.

The right to catch New Zealand seafood is restrained by the Quota Management System (QMS) and only available to residents and NZ-owned companies. The QMS manages the rights of who is allowed to harvest what amount of species in which region (Seafoodindustry Council, 2009). The top five companies in terms of quota ownership are 1. Sanford Ltd, 2. Sealord Ltd, 3. Tally's Fisheries Ltd., 4. Te Ohu Kai Moana Trustee Ltd., 5. Aotearoa Fisheries Ltd. (New Zealand Seafood Industry Council Ltd., 2009), all of which have

interests in the Nelson/Marlborough region, including processing, harvesting and or marketing subsidiaries. Te Ohu Kai Moana Trustee Ltd. is a holding company for Māori quota shares prior to them being transferred to iwi. Once transfer occurs, iwi can invest some of their quota via Aotearoa Fisheries Ltd (Tuhoe Fisheries Charitable Trust, 2002). Aotearoa Fisheries Ltd also owns 50% of shares in the Sealord Group (Aotearoa Fisheries Limited, 2009). These relationships point out a strong interconnection within the aquaculture industry and also the importance of Māori involvement.

Aquaculture and Seafood in the Region (Tasman, Nelson, Marlborough)

With over 80% of New Zealand's aquaculture export grown in Marlborough, achieving >\$200 million per year, the area is the country's aquaculture capital (Marine Farming Association, 2005b; Marlborough Regional Development Trust, n.d.-a). Fifteen percent of New Zealand's seafood exports by revenue and 20% of the total fisheries' production value are made up by aquaculture (Marlborough Regional Development Trust, 2004; New Zealand Aquaculture Council, 2006). Altogether New Zealand's total seafood export value in 2007 was \$1.3 billion and its Aquaculture (Mussel, Pacific salmon, Salmonidae and oyster) export value was \$223 million (Figure 4.8) (Aquaculture New Zealand, 2008; Ministry of Fisheries, 2008d).

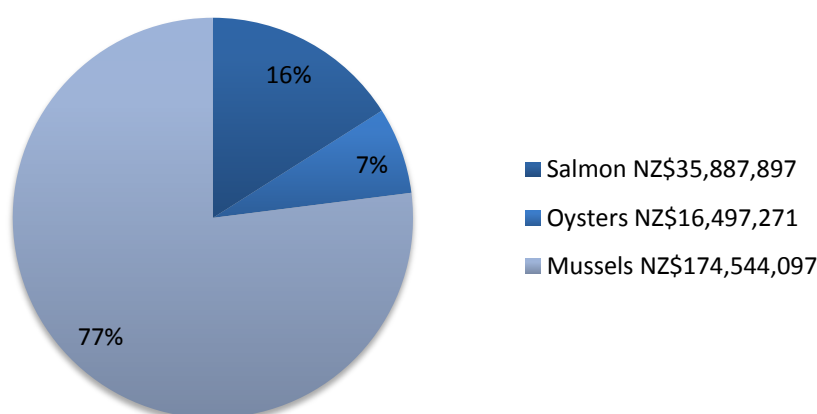


Figure 4. 8 Proportion of Aquaculture Exports 2007

The main export markets are Australia, Hong Kong and the United States (New Zealand Seafood Industry Council Ltd., 2009). Processors, seafood export, and marketing companies are important employers in the region.

The richness of high quality Greenshell™ Mussels, salmon, oysters, crayfish and paua provide the area with its reputation as having quality cuisine (Marlborough Online, n.d.-a; Wine Marlborough New Zealand, 2008a). In general the international reputation of New Zealand's aquaculture products is positive. The Blue Ocean Institute (based in US) bestowed on New Zealand Greenshell™ Mussels one of its highest ratings and considered them as one of the top two sustainable seafoods in the world (Ministry of Fisheries, 2008a). The Institute rated the Greenshell™ Mussels along with the following criteria: "Species is relatively abundant, and fishing/farming methods cause little damage to habitat and other wildlife" (Blue Ocean Institute, n.d.).

While mussel production in 2008 was approximately 3000 tonnes less in comparison to the 2007 harvest, the value increased 17 % to \$ 204.25 million (Aquaculture.govt.nz, n.d.-e). Several coastal commercial fisheries have declined, however, the challenger scallop fishery is still significant to the region (Aquaculture.govt.nz, n.d.-a).

4.4.2 Labour

Commercial fishing, aquaculture (marine farming) and tourism are important parts of New Zealand's coastal economy, particularly in the Nelson/Marlborough/Golden Bay region where the case study was conducted. Seafood processing has been one of the most stable employers in terms of food and beverage manufacturing since 2004. Fruit and vegetable processing decreased slightly but not as extensively as the wine manufacturing sector which since 2005 has employed fewer people than the seafood sector (Figure 4.9) (Career Services, 2007).

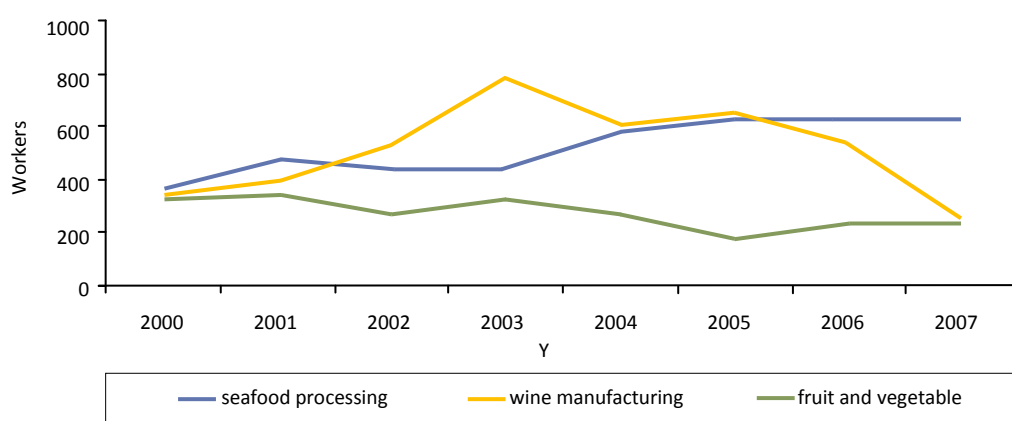


Figure 4. 9 Largest Food and Beverage Manufacturing Sectors in Marlborough, by Number of Employees (2000 – 2007)

Table 4.14 presents the number of employees working in the tourism industry and demonstrates that employment in the three regions is increasingly dependent on travellers to the region; especially the accommodation sector which employs 5.2% of residents (Department of Labour, 2009a).

Table 4. 14 Employees in the Tourism Industry in the Case Study SITE

	Employee Numbers 2008			Ave Ann Growth (%) 2004-2008			Region's Share (%) 2008		
	Marlb.	Nel.	Tasm.	Marlb.	Nel.	Tasm.	Marlb.	Nel.	Tasm.
Accommodation and Food Services	1.870	2.300	1,570	-0.4	6.5	1.5	1.4	1.7	1.1
Accommodation	670	590	530	1.2	0.0	1.0	2.0	1.7	1.5
Transport Support Services	90	340	12	1.4	0.7	-5.4	0.6	2.3	0.1
Heritage Activities	110	120	140	5.1	21.5	3.9	1.7	1.9	2.2
Sport and Recreation Activities	150	250	140	0.0	7.1	-1.7	0.6	1.1	0.6
Travel Agency Services	55	55	80	-5.9	-7.5	5.3	0.8	0.8	1.1

Table 4.15 shows how many people are working in the aquaculture and fishery industry. It indicates that 33.4% of the workforce in Marlborough is working in the aquaculture industry and that there is an upward trend. Comparing the three regions, Nelson offers most employment in the fishing sector (690). The average annual growth of people working in the aquaculture industry in Nelson is 14.4%. In general Table 4.15 proves that the region is very dependent on the

aquaculture and fishing industry with 3,255 employees altogether in those sectors (Department of Labour, 2009b).

Table 4. 15 Employees in the Aquaculture and Fishing Industry in the Case Study SITE

	Employee Number 2008			Ave Ann Growth (%) 2004-2008			Region's Share (%) 2008		
	Marlb.	Nel.	Tasm.	Marlb.	Nel.	Tasm.	Marlb.	Nel.	Tasm.
Agriculture, Forestry and Fishing	4,720	900	5,180	4.4	-4.7	-2.7	4.2	0.8	4.6
Aquaculture	260	60	35	4.3	14.4	-6.1	33.4	7.7	4.5
Fishing	25	690	55	-8.1	-3.0	-2.2	1.6	44.2	3.5
Seafood Processing	440	1,210	480	0.0	-2.9	1.6	8.5	23.4	9.3

The increasing need for seasonal staff working on the vineyards is reliant on a large number of illegal migrants who sometimes live with the fear of being deported, have poor knowledge of the English language, and receive relatively low pay and poor accommodation. As the number of tourists has increased, this has caused rising costs for housing and a higher cultural diversity, especially in Blenheim. Thus many local residents offer accommodation and/or are involved in tourist-related businesses (Marlborough Online, n.d.-b).

Looking at Table 4.16 it becomes obvious that central government concentrates in the Nelson region whereas local government administration seems to be increasingly based in Marlborough (Department of Labour, 2009b).

Table 4. 16 Employees in the Central and Local Government in the Case Study SITE

	Employee Number 2008			Ave Ann Growth (%) 2004-2008			Region's Share (%) 2008		
	Marlb.	Nel.	Tasm.	Marlb.	Nel.	Tasm.	Marlb.	Nel.	Tasm.
Central Government Administration	80	260	50	7.5	0.0	9.3	0.3	0.9	0.2
Local Government Administration	240	140	140	6.0	6.2	3.9	1.4	0.8	0.8

Furthermore, Nelson serves as the centre for education and training organisations and scientific research services (Table 4.17) (Department of Labour, 2009b).

Table 4. 17 Employees in the Education and Training Sector in the Case Study SITE

	Employee Numbers 2008			Ave Ann Growth (%) 2004-2008			Region's Share (%) 2008		
	Marlb.	Nel.	Tasm.	Marlb.	Nel.	Tasm.	Marlb.	Nel.	Tasm.
Education and Training	1,140	2,000	920	3.6	0.5	0.6	0.7	1.2	0.6
Adult, Community and Other Education	110	160	85	5.1	7.5	3.2	0.8	1.1	0.6
Scientific Research Services	15	220	35	5.7	2.4	0.0	0.2	3.0	0.5

Overall the aquaculture, fishery and tourism sector are the main employers in the Top of the South.

**Plate 4. 3 Industry Vessel at Mussel Farm in the Marlborough Sounds**

4.5 Summary

This chapter has provided an overview of existing authorities, affiliations, and developments related to tourism and aquaculture in the Top of the South region by presenting a review of the structures, actors and relations. This has been supported by a review of local economic conditions (Hjalager et al., 2008).

Findings show that the case study region is highly dependent on the tourism and aquaculture industries. Aquaculture and tourism play a major role in terms of employment and economics in the Top of the South. A variety of stakeholder organisations with strong historical relationships were identified. The diversity of stakeholders involved in community policies, regional development and tourism and aquaculture industries demonstrate that the tourism and aquaculture industries are well developed. Several SMEs are providing services to both tourism and aquaculture in one way or another, offering a variety of opportunities for future development.

However, collaboration across industrial sectors, such as between seafood and tourism, is still in its infancy. The link to education institutes in the region is starting to develop, while the region is strong in marine research, but even here a lack of networking is noticeable.

Overall it is clear, however, that the regions' relevant commercial, government and private entities as well as the economic, political, and coastal and marine environmental conditions provide a good foundation for sustainable development. There are links between tourism and aquaculture. The strengths of stakeholder relationships will be further explored in the following chapters.

The previous chapter provided background on the regional context for sustaining capacity for integration of tourism and aquaculture in the peripheral communities in the Top of the South. In this chapter the interview and questionnaire results and analysis present a more in-depth evaluation of stakeholder perceptions of local capacity for tourism and aquaculture linkages and the challenges and opportunities the Trail creates for destination development.

The first section presents a profile of participants to further demonstrate validity, provide understanding of the range of participants, and allow appropriate comparison with similar regions or cases. In the second and third sections, emergent themes from the interviews and associated questionnaire findings are related to the context (capacity for linking tourism and seafood in the region) and then the product (the Trail). The themes are prioritised according to the number of comments contributed by interviewees. Results show the thirteen total themes and summarize the top four emergent themes in more depth for product and context (Figure 5.1). Direct quotations from the interviews are provided as representative exemplars of emergent themes.

Questionnaire responses; 'agreement or disagreement' to the 40 statements regarding perceptions of tourism and aquaculture in the region (rated by the participants on a Likert scale of 1=strongly agree to 5=strongly disagree), are included to supplement discussion of the interview results. Appendix 4 provides full results of questionnaire responses, and throughout the text, questionnaire items are referred to by coding used in Appendix 4 (e.g. existence of a strategic tourism plan = P3). Then all results are evaluated by looking at relationships among the public and private stakeholders and institutions involved in the tourism and aquaculture sectors. As part of this, key stakeholders' perceptions about potential links between the tourism and aquaculture sector are discussed. The chapter concludes by comparing the research findings to the innovation models outlined in Chapter Two.

No. of Mentions (n)	Theme	Cluster		Theme	No. of Mentions (n)
63	Cooperation	Context <ul style="list-style-type: none"> • Background • Culture • Infrastructure • Nature 	Product <ul style="list-style-type: none"> • The Innovation • The Trail 	Concept	81
47	Access			Outreach/Education	80
35	Economic Development			Marketing	63
33	Destination Image			Cooperation	50
21	Industry			Access	39
19	Attitudes			Destination Image	24
17	Resource Use Issues			Awareness	22
6	Marine Resource/ Use Management			Economic Development	19
6	Ecology/Geology			Industry	3

Figure 5. 1 Emergent Theme Codes

The qualitative analysis focused on uncovering emergent themes, which were then examined in the context of the innovation frameworks. Specifically, these themes were compared to the concepts and criteria identified in the peripheral region innovation strategies to evaluate consistency and identify any existing gaps pertaining to the Aquaculture and Seafood Trail.

Subsequently background information about the initiation of the Trail is provided as a means to understand the role of stakeholders in the development of the Trail. The overall goal is to distinguish the Trail's innovative aspects and to point out the main strengths, weaknesses, opportunities and threats identified by the interviewed stakeholders.

5.1 Participant Profile

The respondents represent a variety of stakeholders who influence the development of tourism and/or aquaculture in the study area. Overall the participants were older, well-educated, and long-term residents in the community. As displayed in Table 5.1, more than 80% of the respondents are

between 41 and 70 years old, the youngest participant was born in 1975. Six of the participants were 41 years or older and have lived more than 21 years in the community. Participants were generally well-educated, with 80% having a university or graduate degree. Just over half of the interviewees have held their current jobs for more than five years (56%).

Table 5. 1 Personal Details

Age	%	n=18
31-40	16.7	3
41-50	38.9	7
51-60	22.2	4
61-70	22.2	4

Highest Education	%	n=18
Secondary	5.6	1
Vocational	11.1	2
University	33.3	6
Graduates Degree	50.0	9

Years in Job	%	n=18
0-5	44.4	8
6-10	11.1	2
11-15	11.1	2
16-20	11.1	2
21-25	22.2	4

Years in Community	%	n=18
0-10	38.9	7
11-20	27.8	5
21-30	16.7	3
31-40	16.7	3

While 60% of the interviewees have lived in the community for at least 10 years, the study group also included individuals with a range of longer (31-40 years) and shorter time (less than 10 years) spent in the region. Figure 5.2 shows that 75% of the interviewed stakeholders work in the public sector. These respondents were involved in strategic planning and policy making, in coastal/ocean planning, training and education, marketing and tourism planning (Figure 5.3).

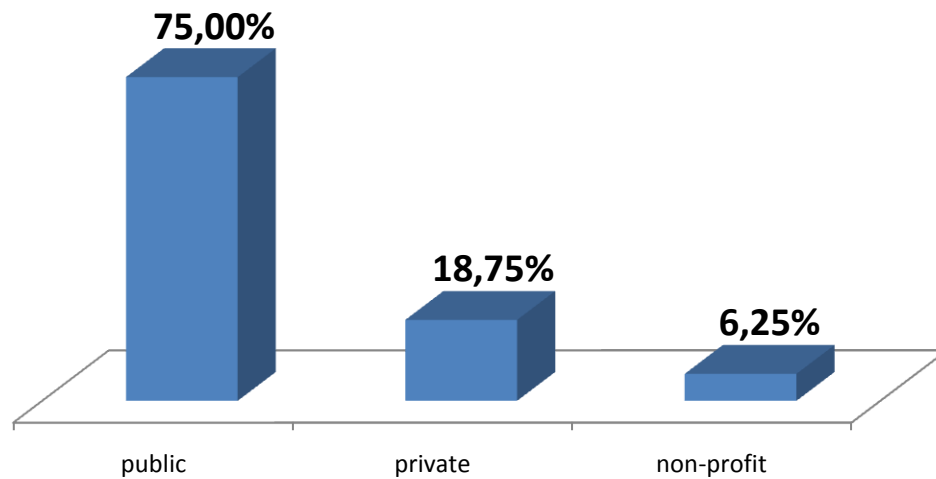


Figure 5. 2 What sector do you represent in the region?

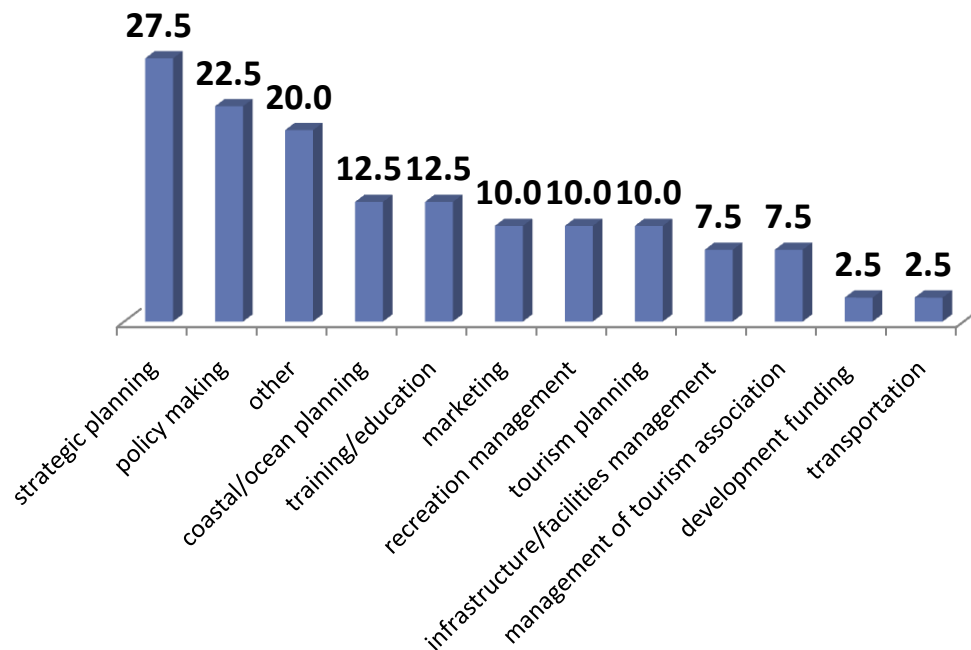


Figure 5. 3 What services do you provide in your region? (in %)

Out of the 22 interviewed stakeholders just nine were aware of the Trail and its brochure, suggesting that the Trail is presently not well-known in the region.

5.2 Context

In the following section the four most significant emergent themes related to the context of the study will be explained: cooperation, access, economic development, destination images.

5.2.1 Cooperation

The theme 'cooperation' reflects stakeholders' thoughts about present and potential future links between the tourism, aquaculture and seafood industry. This theme was the most frequently mentioned (61). The prevalence of this theme reflects recognition of the central importance of cooperation to successful integration of these industry sectors.

Interview respondents (N=6, n=13)¹ mainly involved in the aquaculture industry, pointed out the lack of cooperation between aquaculture and tourism due to limited financial resources. One stakeholder argued proposed support of organisations for further development is restricted: "We work with them [Destination Marlborough], but they don't have enough funding. ... Destination Marlborough has some special programmes for small businesses for international marketing. We are handling our funding just by ourselves" In fact just one quarter of respondents supported the statement of receiving technical and financial support from universities on tourism and industry trends (P6). The present level of cooperation was perceived as a challenge to bringing the different parties together. One regional government representative pointed out that "The main hurdle is that we still haven't matured to the point of taking an approach of let's as a community look at this industry and what makes it work."

However, there was evidence of the community's effort in planning for tourism. One of the tourism planners noted that "we have two strategies here, an overall tourism strategy and an event strategy"; 41.2% of the respondents neither agreed nor disagreed with the existence of a strategic tourism plan (P3). Comparing the importance of tourism to the region (G1) and the perception of the region's strategic tourism plan (P3) there was unanimous agreement (100% strongly agreed/agreed) that tourism is important to the region. However nearly half of the respondents were not aware of the existence of a strategic tourism plan (Figure 5.4).

¹N= number of stakeholders that made a statement; n=overall number of statements

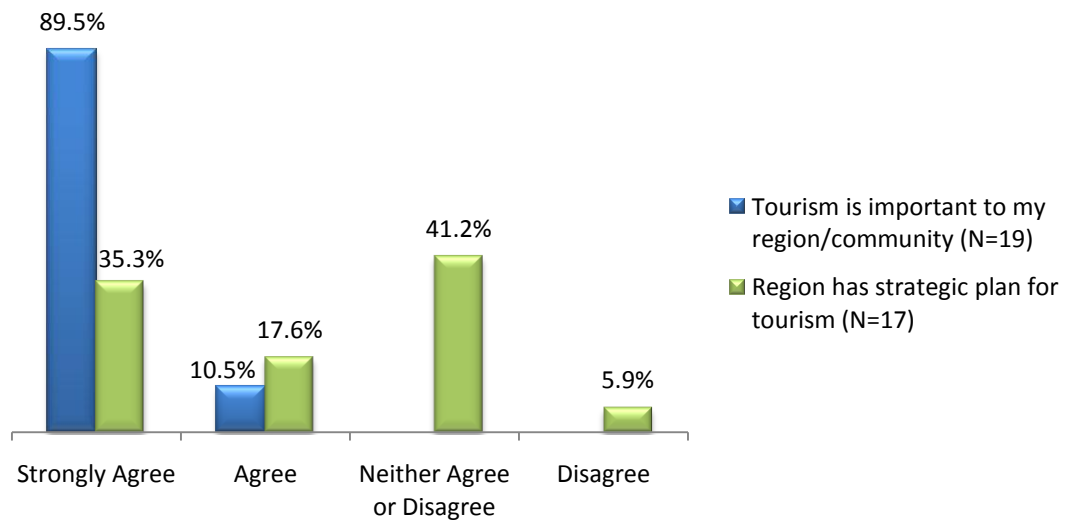


Figure 5. 4 Comparison of tourism is important (G1) and region has a strategic tourism plan (P3) (in%)

Figure 5.5 suggests the perceived differences in the level of stakeholder influence on how tourism is developed in the region (L1). One third of the key stakeholders felt that their decisions can have an impact on the development of tourism, but one third were not sure whether they could change anything and another 16.7% did not feel they have a say in how tourism is developing in the region.

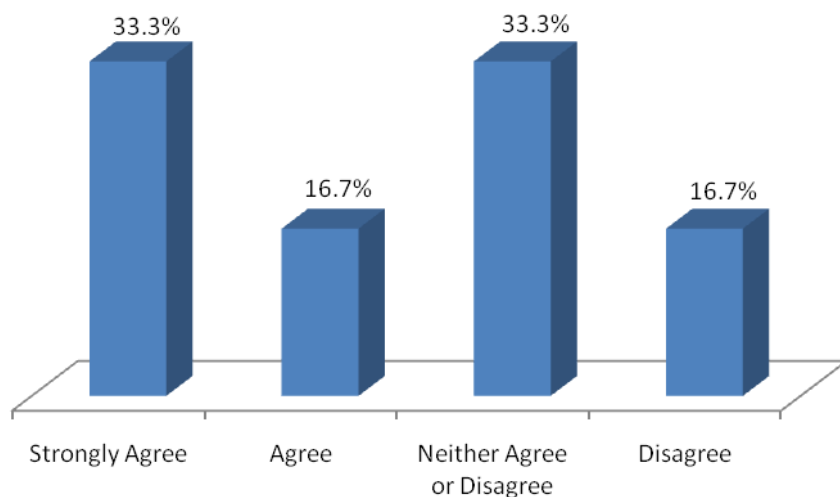


Figure 5. 5 I feel as though I have a say in how tourism is developing in my region (L1) (N=18)

The result shows that 50 % of the regions' stakeholders do not believe their decisions and activities have direct or indirect influence on the development of tourism in their districts.

There were a number of respondents who identified a number of limitations to cooperation. Stakeholders mainly involved in the aquaculture industry (N=4, n=7) described the conflict of companies publishing their own information and using their own resources to promote their interests in order to maximise time efficiency and minimize costs that would result from collaboration. One of the stakeholders representing the seafood industry described the level of cooperation on website outreach efforts as 'very poor':

It sends quite bad messages to industry when government decides to develop [a website on aquaculture] that supposedly represent the industry without actually consulting with you. And as a taxpayer I think people in the industry feel resentful of government spending money when they think, we are actually the aquaculturist, why weren't we asked, where was the engagement on this? It sends quite poor messages and it's not good in terms of building relationships between industry and government agencies.

The nature of the seafood industry and the competitive history of aquaculture are also responsible for the low level of cooperation in the industry from aquaculture representatives (N=6, n=6).

The reality is that within aquaculture the vast majority of aquaculture operations are owned by the same companies that are the big shareholders, in wild catch as well. They are actually the same constituents. Marine Farmers [are] the minority within the industry. They are the people who are running the businesses and are not part of the big companies. And they are right to be a bit fearful and protective of their patch, because they actually have to make themselves heard against the giants.

The research demonstrated that some of the existing collaboration appears not to be as valuable to the local businesses as might have initially been intended. However, the present situation was perceived to be changing as described by one of the regional government representatives:

The industry's become more mature. I don't think it was actually operating perhaps ten years ago as an industry; it was operating far more as an individual thing, [as a] business of opportunities rather than as a collective promotion in good practice management.

However, it was mentioned by respondents (N=10, n=20) that there is increasing cooperation between various parties of the aquaculture and tourism industry who are involved in the destination's tourism planning. Knowledge-exchange between universities and communities and general collaboration between experts in particular areas working across industries were described as working well (N=5, n=8). A representative of one of the councils commented that "The council's got quite a close association with the aquaculture industry, and a positive association, as it has with all the sectors that we are in touch with." This comment illustrates the importance of regional councils in strategic planning for a variety of industries in the region.

The increase in mutual assistance was described as a successful contribution to expanding stakeholders' knowledge, skills, capacity and business ideas. Interviewed stakeholders pointed out that involvement of RTOs and iwi is necessary as they have the power to make a difference as described by one of the Māori representatives: "We partner often with other Māori businesses that are similar to us. We recognise that expertise isn't necessarily held within our people and with our current staff. So we often partner with others that are specialists in other areas."

Overall the support and involvement of regional district councils, tourism industry leaders, ports, and aquaculture industry associations appear to be important centre points for the development of cooperation and integration. For example, one of the district council representatives said:

The council helps to fund a sustainable tourism exercise here and the council is involved with the industry and its land management, and the council is supposed to a large degree to allow market forces to run without intervention. Also when you are mentioning some physical resources, there is an inevitable intervention so that you end up with sustainable plans.

The questionnaire results support these perceptions of collaboration capacity. A majority of respondents believed the tourism industry in the region is locally controlled as presented in Figures 5.6, 5.7 and 5.8 (EC4). More than half of the respondents claimed that there is an existing network with other economic

sectors to promote tourism in the region (EC5). However, almost half (47.5%) believed that conflicts exist between tourism and other economic sectors (EC6).

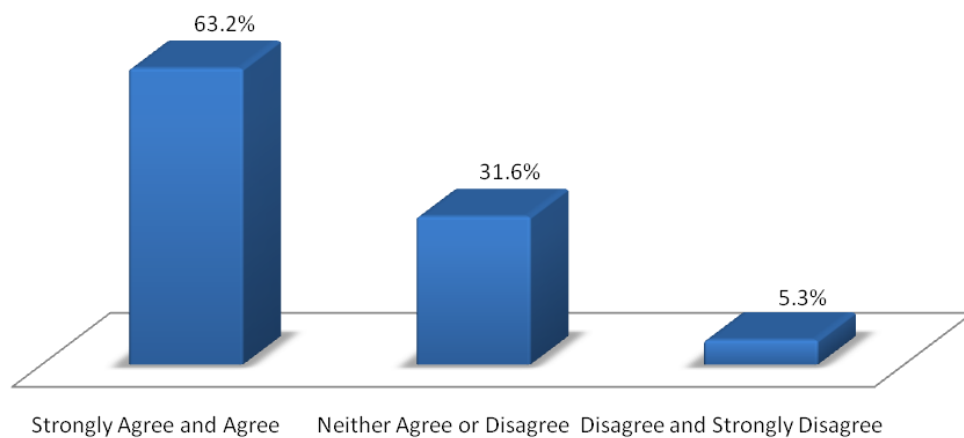


Figure 5. 6 Tourism is a locally controlled industry in my region (EC4) (N=19)

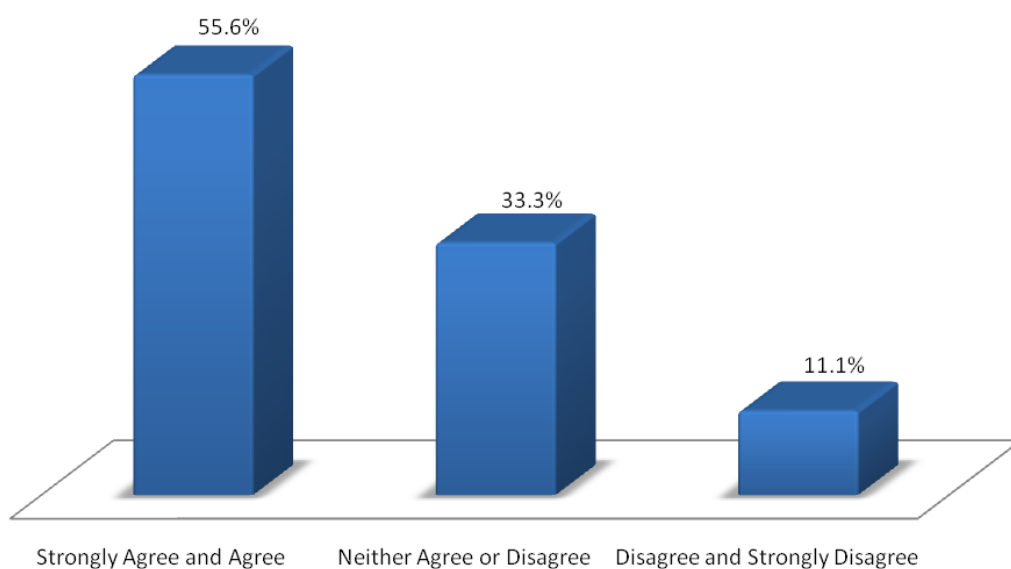


Figure 5. 7 Our region is networking with other economic sectors to promote tourism (EC5) (N=18)

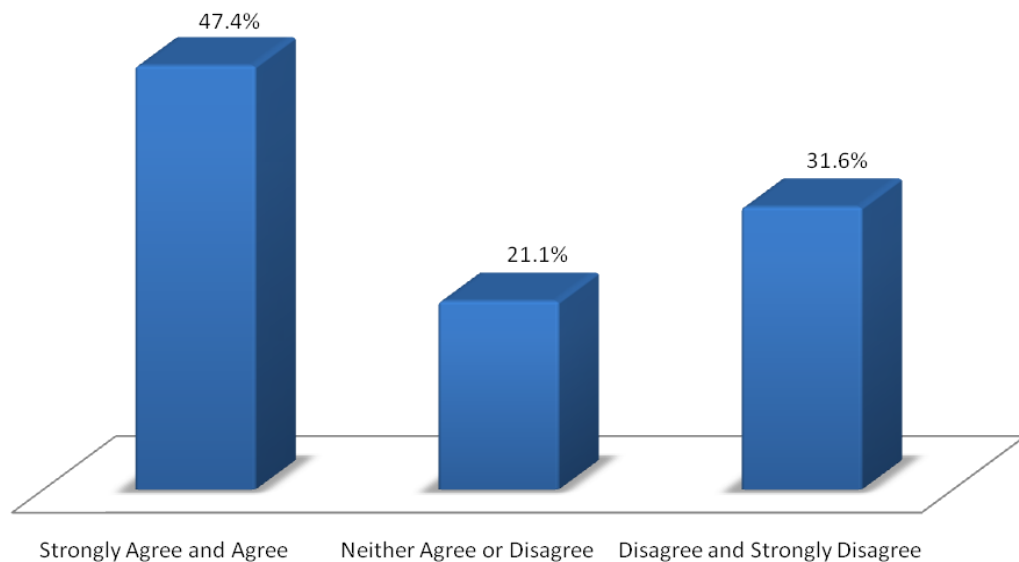


Figure 5.8 There are conflicts between tourism and other economic sectors (EC6) (N=19)

Slightly more than half of the key stakeholders agreed that there is increasing collaboration on product development and marketing efforts in the tourism sector (P4, Figure 5.9). However, more than half of the participants thought that there is a need for better coordination in the tourism industry in the region (P5, Figure 5.10). The somewhat contradictory nature of these two statements are worth investigating further. The fact that at least half of respondents perceive that there is more collaboration in the last five years suggests that there is still some perceived need for coordination.

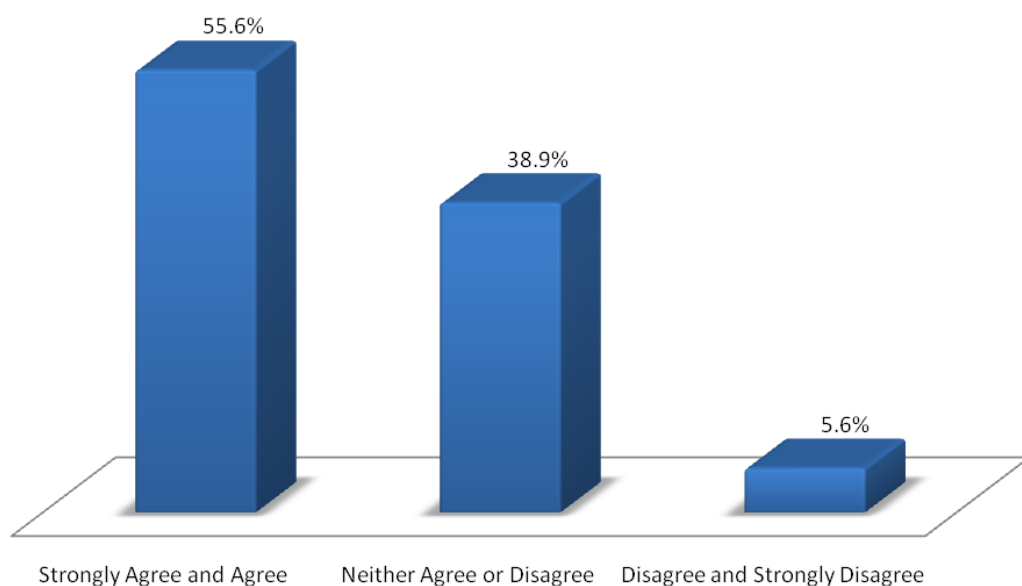


Figure 5.9 Over the past five years more tourism businesses are collaborating on product development and marketing efforts (P4) (N=18)

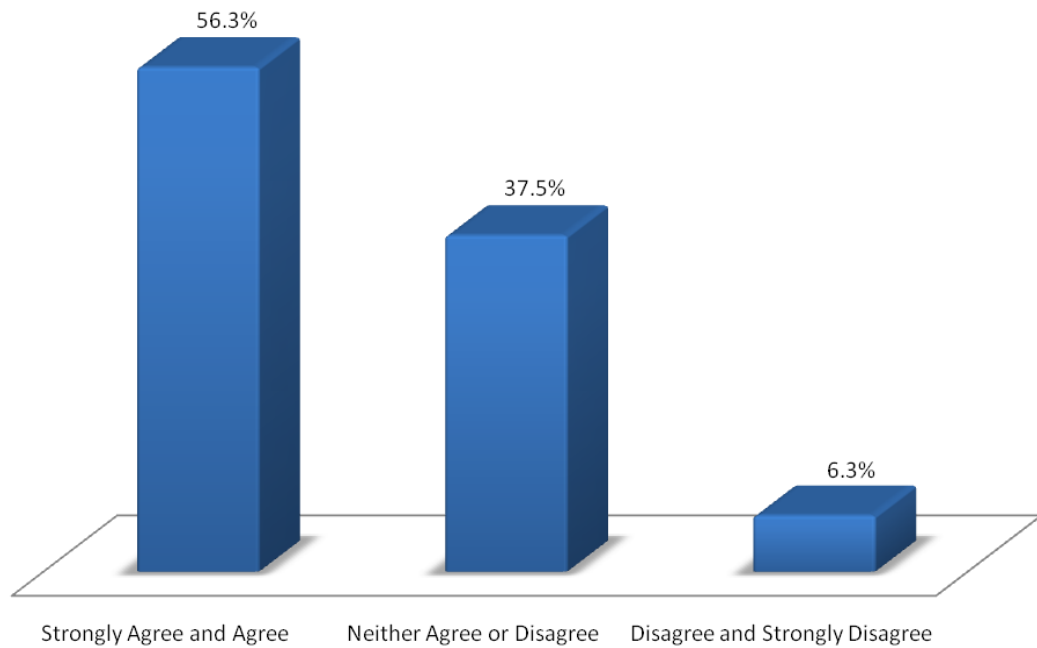


Figure 5. 10 **There is a need for better coordination in the tourism industry in my region (P5) (N=16)**

The perception of economic indicators of collaborative capacity also suggests there is room for improvement. Stakeholders strongly agreed/agreed (72.2%) that the region integrates cultural offerings like festivals, events, music and/or storytelling into its tourism products (P2, Figure 5.11), which is consistent with the perception of improving collaboration. However, while 61.1% of stakeholders strongly agreed/agreed with the statement ‘tourism has grown in my region in the last five years’ (G3), more than half of the stakeholders were not sure if there had been any new attractions in the last five years, or believe there are none (EC3) (Figure 5.11).

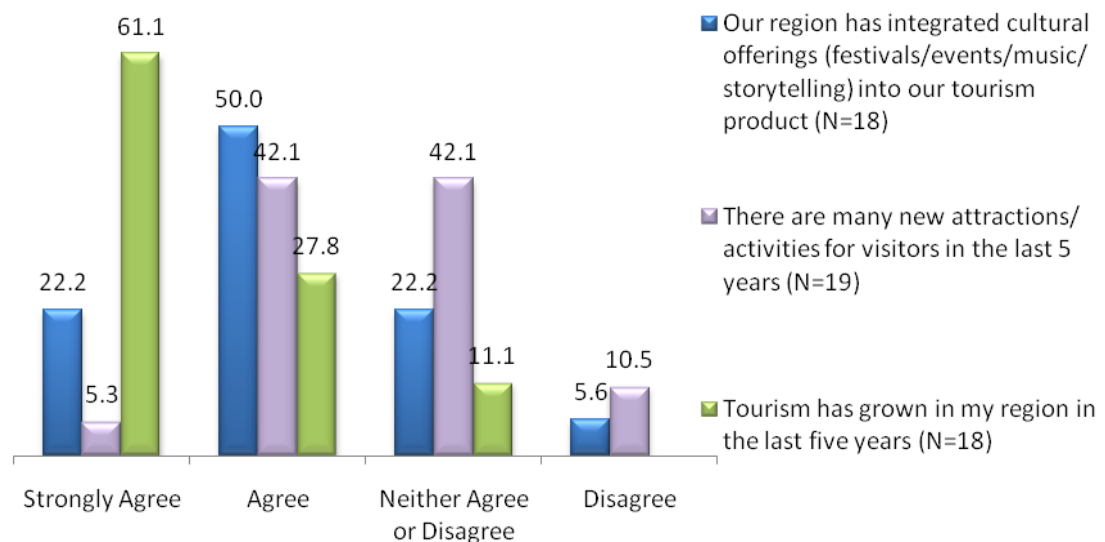


Figure 5. 11 Comparison of new cultural offerings (P2), attractions (EC3) and growth of tourism (G3) in the last five years (in %)

Furthermore there was no clear sense from participants about the increased use of technology to promote tourism (P1) as shown in Figure 5.12.

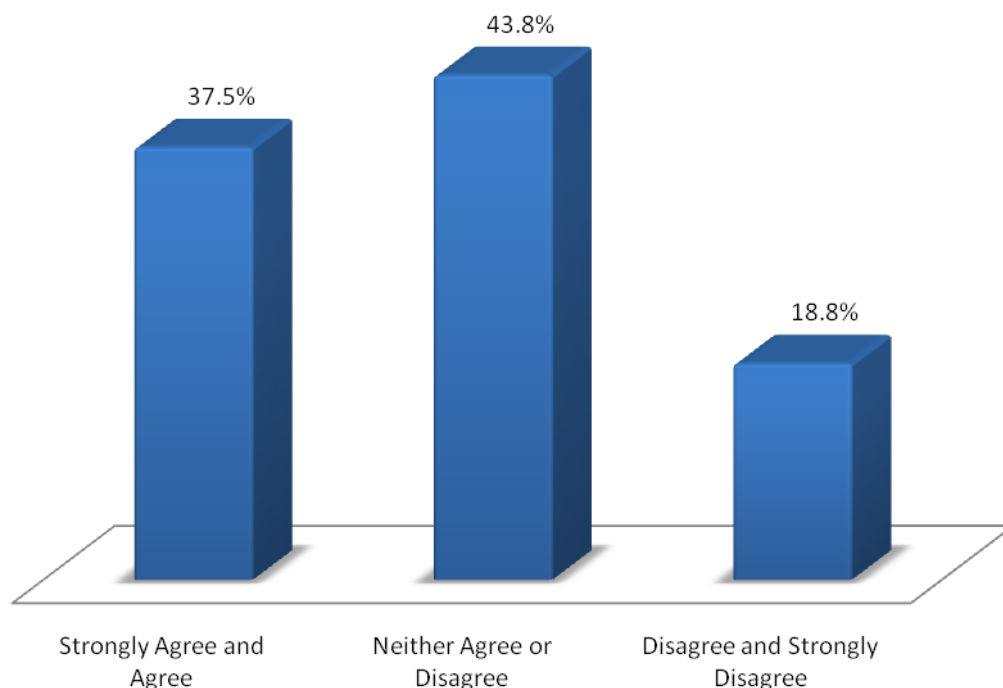


Figure 5. 12 Our region is maximising the use of technology in promoting tourism (P1) (N=16)

Discussion

On the issue of cooperation, the results reveal that strategies that encourage coordination and collaboration between businesses in the Top of the South

would be beneficial to the integration of seafood and tourism. At this stage the different players including corporate representatives, voluntary organisations and public actors in the community (Hjalager et al., 2008) seem to mainly focus on their own sectors rather than thinking of collaborative strategies throughout the communities.

In rural communities small enterprises and primary-based industries are the main source of economic growth. Coordinated collaboration between industries has the potential to provide a strong competitive advantage to improve innovation performance (Government of Newfoundland and Labrador, 2005). The goal of linking businesses from different industries will require strong management skills for destination development. Locals' lack of knowledge and skills to participate in tourism planning, the unequal distribution of power, and the uneven flow of information are a number of the challenges in involving local communities in tourism planning (Moscardo, 2006; Richards & Hall, 2000).

Collaboration of the aquaculture, seafood and tourism industry in the Top of the South could lead to a competitive advantage over other regions that are also aiming to attract visitors (Fyall and Garrod, 2005). General collaborative approaches between regional stakeholders could create future opportunities such as economic benefits, financial support, and increased international reputation. However, at present the influence and role of key stakeholders in regional development appears as not clearly defined. Within sector and cross-sectoral relationships among the different parties involved in tourism and aquaculture there is a need for clarification and strengthening to integrate tourism and aquaculture. Networking strategies have to be improved, responsibilities need to be well-defined and expertise is necessary to develop a strong brand for the region (Lebe & Milfelner, 2006; Mitchel & Hall, 2005; Yeoman, 2008b).

To ensure sustainable community development that depends on tourism, all stakeholders require adequate understanding of tourism (Okech, 2006). The study identified weaknesses related to technical and financial support from universities on tourism and industry trends. However, stakeholders' awareness

of benefits resulting from cooperation among the local businesses across industries such as economies of scale, education and training, access to marketing expertise, advanced technology and economic advantages (Morrison, 1998) were apparent. Due to the sector specific planning strategies of the aquaculture industry, the approach of working together is innovative for a region (Rogers, 2003).

Interview results showed that the lack of communication between stakeholders and businesses organisations seems to be a key issue in the case study region as demonstrated in the example of a stakeholder complaining that the government developed an aquaculture website without any consultation with the industry. There is a need for increased financial and advisory support for experts and leaders of the industry. To involve key stakeholders, including decision-makers, managers, academics, researchers, politicians and planners in the tourism planning process, the present tourism strategy and stakeholders' share in the development of tourism in the region has to be clarified. Creative and innovative management approaches will need to be applied in this process (Buhalis & Costa, 2006).

Research related to the Trail implies that there is a need to encourage operators to collaborate instead of competing against one another. There is also a need for greater awareness among locals about the positive contribution of tourism and aquaculture to the region through new experiences that provide lasting memories for visitors (World Tourism Organization, 2004). To enable successful, sustainable integration of aquaculture into tourism development, tourism planners and the aquaculture industry need to recognize the advantages of working together in future strategic planning and in creating economic advantages of co-development initiatives such as the Trail.

5.2.2. Access

The theme 'access' not only includes general issues of transportation to and within the region, but also describes the options for locals and visitors in the region to gain access to local marine products either by purchasing or eating local seafood, obtaining information about the seafood industry, touring marine

farms (including participating in harvesting) or observing the processing of seafood.

While two-thirds of the stakeholders confirmed that there is good access in terms of transport for visitors to the region (A1 and A2), the same number of people disagreed/strongly disagreed about the region having a good public transport service for visitors (A3). This would suggest there is an obvious need for better public transport within the region. Additionally, better public transportation would increase the sustainability of the region by linking communities. This issue might be one explanation for the low number of respondents strongly agreeing (33.3%) with 'tourism in my region is well developed' (G2).

In addressing 'access to local marine products' an interesting outcome of the interviews was that respondents (N=6) expected that not only tourists but also locals might have a high interest in more options to access seafood at markets and through recreational and educational activities. Although there are a number of water taxis operating in the area, the long distance from the shore to the marine farms was described as a time and effort barrier to the accessibility of the aquaculture industry. Additionally the usual practice of residents communicating and advertising local attractions and products to friends and their families was suggested as a reason why local access is important.

Informing locals and visitors more about the industry through the development of greater access was recognised as a strategy for changing the local attitude towards aquaculture. This idea provides another motivating factor toward appreciating the value of creating more links between the aquaculture and the tourism industry. For example, to participate effectively in word-of-mouth marketing, residents have to know what is available, but, as one local government representative pointed out, affordability of experiences for locals is important:

Getting local buy-in is actually important to make anything work, because we are all sort of ambassadors for tourists. It's one of those things, where people come to Nelson to visit and they stay with friends or they are in someone's house, while they are away, so making sure that local people

are aware of tourism opportunities and giving local people opportunity to actually experience some of these things. That is pretty important, because a lot of New Zealanders have never been out on a fishing charter vessel or actually cruised around the Marlborough Sound.

The study found that there were few options for people to buy local seafood products other than in restaurants, a few seafood products in stores and one local seafood outlet in Nelson. There is a lack of fish markets and apparent fish shops other than small counters in the big supermarket chains. The need for more access points to actually consuming local seafood was also identified (n=11). Two interviewees pointed out that there are a high number of self-catering tourists in the region with high interest in culinary experiences but the region provides poor access to seafood in terms of purchase and observation possibilities.

To buy fresh seafood in Marlborough is not easy. If you are looking for a fish shop, it's actually not easy. We got a lot of self-catering tourists; we don't really make it very easy for them to access the seafood that is here.

In comparison to public access to vineyards and their production sites, the lack of access to marine farms and seafood-processing plants reinforces the fact that there is a lot of infrastructure not yet developed, although the main resources are present. Existing infrastructure was described as being capable of improvement and upgrade to provide access to seafood retailers to make the visitor experience comfortable, safe and enjoyable (n=6). The creation of more seafood outlets would provide the opportunity to buy the local catch, and offer an experience which is appealing for coastal visitors:

Seafood is a motivator, absolutely, around the world people are interested in fresh seafood, and it's a fundamental experience that many people love to have. It must be consumed fresh and quickly, and it's always a type of food visitors seek because of its freshness and it's healthy as well.

Aquaculture regulations were mentioned as one area of concern by respondents (n=13). As marine farms are located in public space, respondents (N=5) representing government organisations perceived existing laws as tolerable. Expanding opportunities to access the industry sites and sell the catch were described as possible under current policy: "There is nothing to stop you

selling your catch from the dock. But for tourists to climb on your boat, for health and safety, you can't have that, you've got to land to a dock."

However, regulations and permitting issues were mentioned as restrictive in increasing the access to seafood in terms of selling fish directly from the boat, in retail shops or at a fish market (n=3). To provide tourists with access to local seafood would also be expensive for seafood producers, because some staff training and special equipment and changes in facilities to meet safety and health regulations is necessary.

It's an opportunity, but I guess I tend to think if it would be easy someone would be doing it. One of the issues I see around that is the very stringent hygiene regulations related to seafood processing in New Zealand, that I have the impression that visitors are a problem rather than an opportunity for seafood processors.

In addition, the sale of local seafood to local buyers was mentioned as not profitable. Furthermore, commercial fishing quotas (annual catch restrictions) and levies associated with the QMS were perceived as limiting the possible use of the marine resources for local markets, particularly given the greater economic benefits of export. This preference for bulk export over sale to single buyers was acknowledged by one of the seafood industry representatives who said:

We get complaints from retailers who say, we are only interested in the exporters. It's not true, but at the end of the day your levy payment comes from the industry so it gets invested where the majority of best benefit is industry-wide, so 80% is spent on harvest, growing and export and maybe 10 to 20% is gonna be spent on people selling it domestically.

Discussion

Stakeholders' opinions regarding the existing access to the region, both in terms of transport and in accessing local marine products and information indicate a need for improvement. This should be expected in peripheral areas, where transportation linkages have to be well developed to make it easier for tourists to visit a destination some distance from urban centres (Botterill et al., 2000). A better road system, an efficient public transport system, more access for purchasing and interacting with seafood-related attractions and activities and seafood products, improved signage and quality control are needed to improve

the quality of life of the residents and increase the region's national and international reputation as a seafood destination. These are common issues experienced in peripheral regions where collaboration is still developing (Brown & Hall, 2000b) and is very well suited to the region's visitors that are predominantly self-catering tourists (New Zealand Tourism Guide, 2008a, 2008b).

According to the Government of Newfoundland and Labrador's innovation model (2005), transport access to the region is as important as the access to R&D resources when it comes to providing optimal conditions for an innovation performance. Improvement of local access to the region's fresh seafood, to marine farms and to processing plants would benefit residents and domestic and international tourists, allow more people to make use of what the region has to offer and enable opportunities for increased local economic activity dependent on tourists.

Stakeholders involved in the aquaculture industry do not prioritise access to local seafood products as providing economic value for their businesses. Stakeholders involved in the tourism industry considered existing and possible further options for visitors and locals to connect with local marine products as valuable in several ways. Opportunities to buy local food, get information about the industries and have a look inside the production processes were emphasised as giving the region a strong competitive brand that would increase its reputation nationally and internationally through word-of-mouth and as a form of marketing for the region (Lebe & Milfelner, 2006; Mitchel & Hall, 2005). That result would increase demand for exported marine products from the region.

Further, the focus on cultural aspects involved in the development of the marine industries has many potential links with Māori culture; showing traditional ways of cooking local products; organising festivals such as the Havelock Mussel Festival; and allowing access to areas of natural exclusivity were pointed out as huge opportunities for regional development that would increase the level of perceived authenticity (Boniface & Cooper, 2005). By

improving access to authentic services of the community visitors are more likely to understand the unique sense of the place (Pichford, 2008). Synergetic benefits can be expected as an outcome of collaboration between the different industries through open resource access (Hjalager et al., 2008).

5.2.3 Economic Development

The theme 'economic development' summarises stakeholders' thoughts in terms of capacity building, priorities and outcomes related to the linkage of tourism to the aquaculture and seafood industry. Participants mentioned a need for leadership and a better understanding of demographic and economic trends. The seasonality of the tourism industry was also mentioned as a challenge to be overcome in furthering market opportunities.

Participants (N=5, n=7) mentioned that there are a number of opportunities and challenges in boosting the local economy by linking tourism and aquaculture. Important opportunities include building on existing relationships. Although one of the Māori representatives welcomed strengthening opportunities generated by combining the aquaculture, seafood and tourism industries, this individual also mentioned that the overall goal should be to ensure that businesses are profitable and sustainable:

We are involved in the development of tourism. We contributed significantly to the regional tourism strategy for the area here. ... I suppose it is essential to be profitably involved in a viable and sustainable way. ...We want to see ourselves be reflected in tourism as Māori and our reality, our identity, and that's been our approach. But in tourism there is a difficult climate we are operating in at some times in this region. The focus has been on profit, which is all about viability and leads to sustainability. You can't be sustainable, if your business isn't viable.

In terms of possible challenges related to investment and public and private aspects of development, one destination planner pointed out:

There are concerns that in a lot of these areas we are providing public funding to organisations which are commercial in their own right. We are providing benefits to their members under the guise of benefits to the community. I don't believe that is strictly valid – Destination Marlborough is the best example - Destination Marlborough has public funding and industry funding, but is more public - an organisation that is set up to promote tourism and is run by tourist operators and a large

part is run for tourist operators involved in Destination Marlborough as opposed to the wider regional tourist mandate - it's not wrong, but it's a problem.

The majority of respondents agreed (63.2% strongly agreed and 31.6% agreed) that local businesses benefit economically from tourism (EC1). The dominance of small- and medium-sized businesses in the region (EC2) indicates a need for coordination to improve the potential for linkages between tourism and aquaculture to contribute to economic development.

The impact of the present economic crisis was mentioned by two representatives from different district councils (N=2, n=3). Rising costs were perceived as a threat to economic sustainability in the area. Local politicians expressed concern about the possible extent of necessary investments and the uncertainty about limits to further development and growth of tourism in the area. It was felt that even though the general data were available, evaluation and tracking of the economic data were missing to inform a growth strategy. For example, one respondent said: "The issue is not necessarily, how much we need to expand, the issue is do we need to expand? These questions have to be asked, you can't make an ordinary assumption on growth."

The uncertainty of the aquaculture industry making long-term investment in processing plants in the area, to add value to the communities (through increasing tax revenues and employment opportunities) or having the choice to transfer their capacities to other countries (with cheaper workforce) was also a great concern.

One of the marine farm parties said that they would at some stage [begin] processing on Golden Bay, but that depends on economic factors, so there is no guarantee as to when that might be. There is probably lots of future potential that's not immediately obvious with what happens at present. Yeah, five to ten years, it might be you get processing in the immediate five years.

Stakeholders (N=5, n=6) pointed out the opportunity to expand the capacity of the region especially in terms of transportation and accommodation. While businesses and accommodation have been rapidly growing in the past, not enough has been done so far to adjust and expand the capacity of roads, harbours and community infrastructure due to the enormous costs to the tax

payer: "Tourism still grows, but from what I can get at the growth has slowed, but I don't think it stopped substantially." The officials of local authorities were aware of the limitations to further development of both industries - tourism and aquaculture - due to the existing community infrastructure, but expressed uncertainty about the necessary consequences:

We have a lot of interest in bringing in bigger ships, but it does start getting into the infrastructure, like the number of buses.

The tourism accommodation in Picton adds a huge amount of overnight stays to Picton, and Picton's water supply and sewage treatment capacities have limits. So you just can't start throwing people in there and hope to sustain it.

Further, there was strong agreement about the seasonality of the tourism industry (S1: 84.2% strongly agreed/agreed), the attempt to expand tourism services into the less popular seasons (S2: 73.% strongly agreed and agreed) and the importance of expanding the tourism sector (G1) during less popular seasons. Reducing the seasonality of tourism to develop a steady demand in support of labour and economic benefits was mentioned as necessary. This points out the need for an approach for the development of new attractions/activities (EC3) to attract more visitors and/or involve locals during the low season.

Discussion

Governments are conscious that the local natural environment, culture and everyday life are resources for the development of the tourism industry. Research results showed that key stakeholders perceived the tourism sector as essential for regional development (Forstner, 2004). The physical advantages of the geographic and marine environment of the area were identified as a strength of the region that needs to be further exploited. However, the limits to growth of aquaculture were also pointed out with regard to the moratorium (Ministry for the Environment - Manatū Mō Te Taiao, 2003) and current policy. Recent growth in the aquaculture industry is very limited because of the complex process of establishing AMAs. These conflicts result in threats to economic development in the Top of the South. Further challenges are to balance the utilisation of the destination's competitive aspects, focus on the

development of environmentally friendly tourism that protects these resources from overuse and excessive development (Edgell, 2006; Leung et al., 2001).

Findings illustrated that stakeholders in the Top of the South tend to exhibit a willingness to grow, develop, and launch new projects; however, these entrepreneurial capacities still have to be nurtured to develop leadership capacity and put ideas into practice. Current economic conditions intensify the willingness and need for implementing new ideas (Hjalager et al., 2008).

It has been established by other researchers that economic growth by tourism necessitates the sustainable management of community resources that incorporate local heritage and environment (Richards & Hall, 2000) and results indicate recognition of this need. The increasing competition is forcing planners and managers to focus on strategic destination planning to keep their share of the tourism dollar and to reduce the seasonality of the industry, as also found by Ruhanen (2007).

The investment in new projects was perceived as a general challenge that could be counteracted with more research data to inform strategic planning. Community support and trust in regional planning can be increased by providing and sharing more information about the industries' features and opportunities. Involvement of research institutes and professionals in destination development would be beneficial in this case and have a positive effect on economic development. Additionally the requirements of potential customers for services such as infrastructural aspects, and the increasing level of interest among tourists in local food of peripheral regions, have to be considered to create a sustainable and effective development strategy (Hjalager et al., 2008).

5.2.4 Destination Image

The theme 'destination image' describes the current situation and possibilities regarding the region's marketing image.

The results illustrate that the 'point of difference' for the Top of the South can be its identification as a destination, as a region that promotes aquaculture and

seafood tourism. Aquaculture and seafood were described as adding 'personality to the region', as one stakeholder commented:

One of the points is the environmental connect between aquaculture tours and environment; if you are looking at what makes NZ special, it is this sort of environment, it's pretty good compared to a lot of parts in the world.

Respondents pointed out that there is value in increasing the focus on the 'green' and 'sustainable' environment programmes to attract the sort of visitors NZ is targeting anyway as part of the 100% Pure campaign (N=5, n=6).

A lot of people come from European countries or Asian countries, that are often quite polluted, and so for them to go out and encounter clean and a good natural environment would be a very good thing and the majority of people that come to Golden Bay come for the outdoors. They come because of the natural environment; they don't come for big shows or culture-type things, and they come for the environment.

One interviewee also indicated that a focus on the health benefits of the seafood and the sustainability of aquaculture fits the regional approach of being recognised as 'green' and 'health-aware'.

Wellness is seen as strength of this region and there is an embryonic wellness cluster that is formed, there is a tourism component for that, but it's not just about tourism, its wellness in its wider context, from a preventative health perspective. That is managed by the economic development agency and a small bunch of members of the cluster. ... [They] determine what the criteria would be for the cluster, because one of the things they are very concerned about is to make sure they have credibility as they develop, as they clustered people who are involved, as seen as offering, an experience that is not unauthentic.

The existing reputation of the region as a wine destination was perceived as supportive of present efforts to link marine products and local seafood. The concentration and promotion of seafood complements the existing image of the region linked to wine (N=4, n=6). For example, one educational institute representative commented: "... a lot of the vineyards are starting to mark up wine, seafood and things. So you do have a potential to mix the seafood and culinary and tourism experience together."

Moreover making the region famous for its seafood was seen as an opportunity to enhance export marketing (i.e., international tourists able to recognise and purchase the local products in their home grocery stores). Stakeholders noted

especially that recognition of local products was an opportunity to attract more people to the region and spend their money on local specialities, which they know are also available from their supermarket in their home country and vice versa: “It’s a huge opportunity; these are our exports and here is the client visiting NZ. Educate them about these products that are exported and they take that home with them; it’s a good way to work together.” Creating a positive image of the destination through linking the aquaculture and seafood industry was recognised as of value for both industries and the communities.

Respondents also mentioned that there are existing tourism marketing collaborations that could be used to promote the destination’s image (N=4). The aquaculture theme was identified as one unifying aspect for the Top of the South and thus as a linking element between the different industries.

We already do all our international tourism marketing together, as one combined unit, and we do talk in that marketing activity about the seafood experience in the top of the South Island – absolutely, there is the potential to do more.

However, this will be a challenge since the study shows that the region does not fit into ‘one destination image’ because there are some distinct differences between Marlborough and the Nelson/Tasman areas. One respondent involved in tourism planning said that collaboration might be difficult because...

Marlborough and Nelson are quite separated from a branding perspective, Marlborough has some more defined brand, because it’s about the Marlborough Sounds, and everything that goes with the Sounds, and then the Marlborough Sauvignon Blanc - the two key platforms; this region here is much more complex from a brand perspective, there is much more here from a visitor experience, there are three national parks here, arts and craft and activity, ... business tourism, activities and a range of outdoors, it has food and wine; much smaller than the winery perspectives in Marlborough, so there is quite a complex mix here.

Differences were also noted between these areas in terms of the presence of marine farming. The Marlborough region has a 30+ -year history of marine farming and a notably greater acceptance of aquaculture as part of the local culture, while the Golden Bay/Tasman area is just starting to apply for more extensive marine farming permits and is already encountering more significant opposition from residents. The questionnaire results suggest lack of agreement

regarding regional branding. One quarter of the respondents did not agree that there is a clear brand for the region. Only half of the respondents agreed/strongly agreed (M1) that the regional website is beneficial for their particular business (M3). Only 47.1% strongly agreed/agreed that 'the marketing efforts for our region are well-coordinated' (M2).

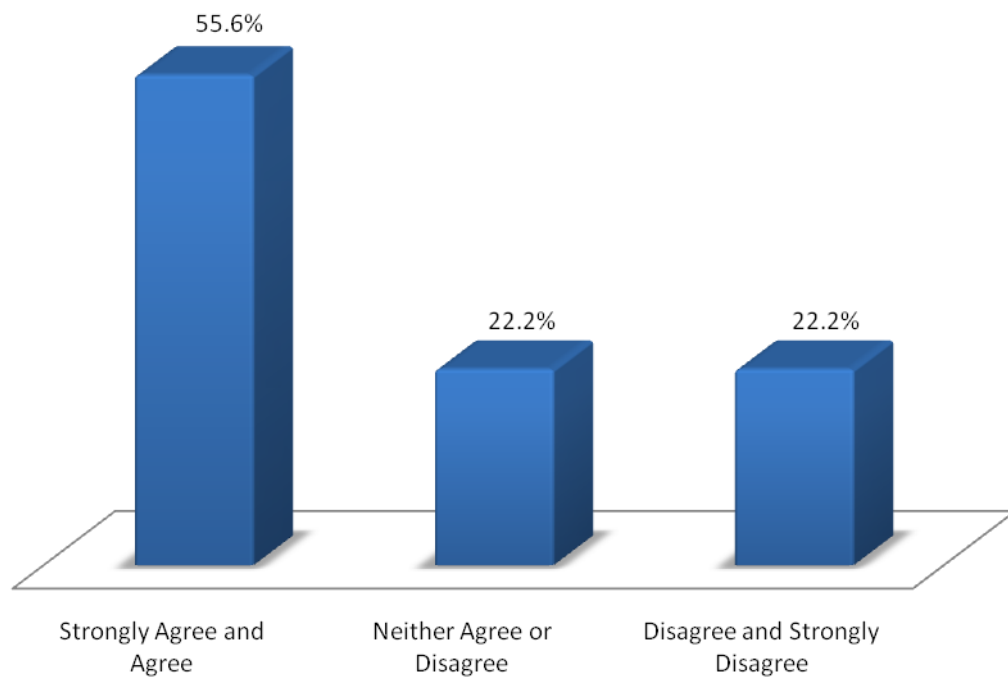


Figure 5. 13 **There is a clear marketing brand for our region (M1) (N=18)**

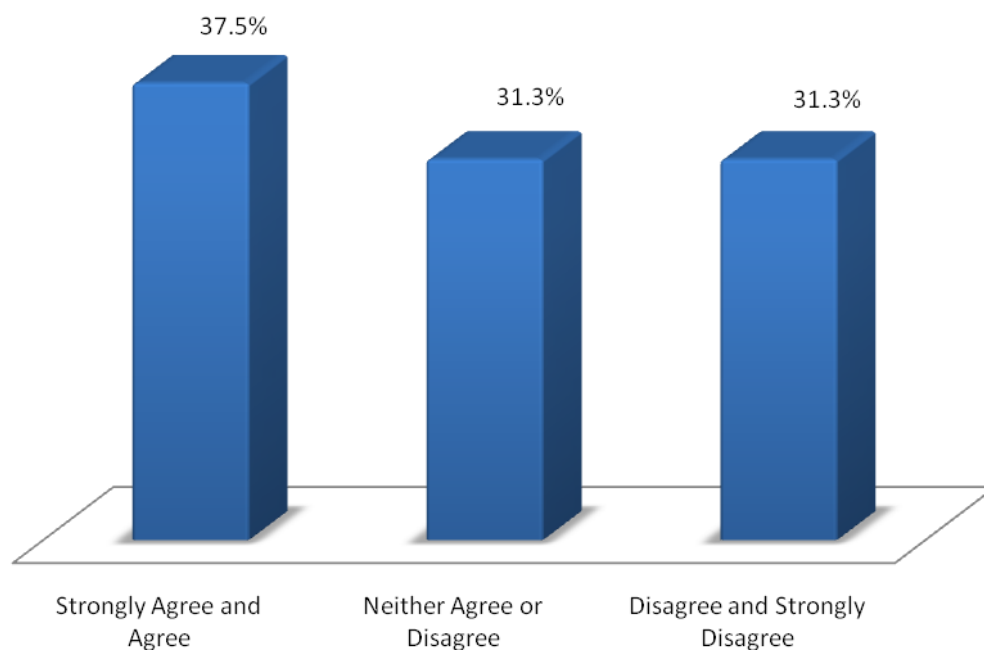


Figure 5. 14 **The website for our region is beneficial to my business (M3) (N=16)**

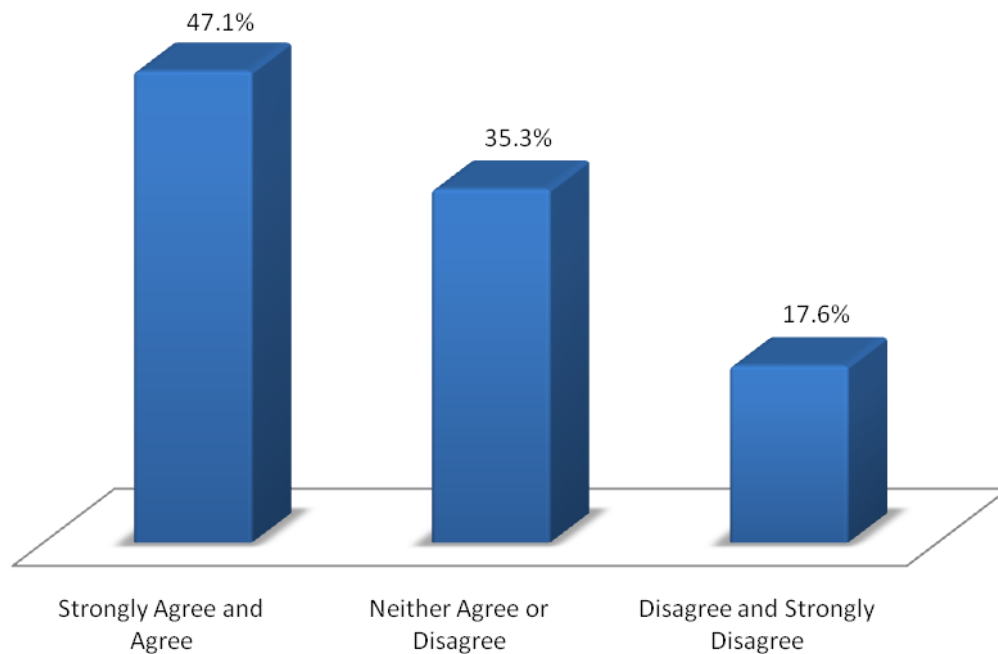


Figure 5. 15 The marketing efforts for our region are well-coordinated (M2) (N=17)

Discussion

The questionnaire results identify that respondents are not satisfied with the marketing of the case study region and disagree as to whether there is a single destination image. Today's travel opportunities and tourists' expectations are high. A destination's differentiation is more crucial than ever due to competition resulting from globalisation of the travel industry (Boniface & Cooper, 2005; Buckley, 1999). This suggests that industry perceptions of destination image may influence collaboration through perceived benefits of partnerships in marketing efforts.

In order to become competitive, stakeholders have to focus on local icons, attractions and activities and convert them into main attractions focused on targeting a niche tourism market (Burns, 2006). To meet the expectations of potential customers to the region, the communities in the Top of the South have to define a sense of place for the region (Yeoman, 2008a). Synergies resulting from collaboration between the tourism and aquaculture industries and the advantage afforded by having such an attractive environment also create an opportunity to make the region's authenticity genuinely accessible (MacCannell, 1973). Stakeholders responsible for economic development and resource management can play an important role in driving a collaborative

marketing strategy of aquaculture and tourism, which in turn could initiate linkages among local businesses and build a strong brand that reflects local characteristics (Hall & Mitchell, 2001). This approach could also be complementary to the existing wine image of the region and the scenic coastal landscapes. Overall stakeholders expressed the need for clear destination branding. The image of aquaculture and seafood was perceived overall as fitting the region very well. Therefore, these strategies have potential.

Dissatisfaction with the region's branding suggests that improvements are required in the destination's marketing strategy. Regional authorities must become more aware of the possibilities offered by modern technologies and make maximum use of them (Mair et al., 2005). According to the Government of Newfoundland and Labrador's innovation model (2005), the identification of market opportunities is essential to improving innovation performance. To profit from an innovation, the target market has to be identified, the product commercialised and the advertisement has to be attractive (Government of Newfoundland and Labrador, 2005). For the Top of the South, the resources from the marine environment provide an excellent opportunity to create a known brand for the region. Again, this fits with authenticity research suggesting that more and more travellers are seeking authentic experiences based on the unique sense of place (Yeoman, 2008b).

5.3 Product

Respondents' perspectives on local conditions in the case study region provide information about the potential for success of innovations that focus on seafood and tourism. The Aquaculture and Seafood Trail is a specific innovation product that links seafood and tourism industries. Therefore, this section presents results and analysis for the key challenges and opportunities for developing an Aquaculture and Seafood Trail as a means to examine product performance and potential within the existing destination development system.

The following themes prioritised by key stakeholders – concept, outreach/education, marketing, and cooperation - related to the Trail, will be discussed to evaluate the potential sustainability of the Trail in the region.

5.3.2 Concept

The theme ‘concept’ outlines interviewees’ thoughts about the relevance of the Top of the South Seafood Trail as a tool for integrating the aquaculture industry and the consumption of seafood in the region.

Overall the feedback of participants to the Trail idea was positive. Comments were predominantly made in the category of strengths and opportunities. Two interviewees described the Trail as an innovative approach that is linking the different industries along the whole region under the umbrella of tourism. Stakeholders (N=5, n=7) made mention of the ability of the Trail to take advantage of the leadership capacity of the region. The *proactivity* of small businesses was emphasised by one stakeholder as a good basis on which to make the Trail work and keep it alive. For example, community members from the industry were described as initiating and driving these sorts of new ideas: “He is an innovator, he has been in the industry from the very beginning, he was a Ministry of Fishery person back in the 1980s, and he was part of the development of the initial plans.” The fact that the Trail was developed through leadership of the MFA reflects these characteristics of community-level entrepreneurs.

Stakeholders also noted expected economic benefits (N=5, n=5) for businesses participating in the Trail project. According to them the Trail-concept enables individual participants to advance their business. Increasing visitation, learning from other Trail members, and benefiting from possible synergies within the region through partnership offer a variety of opportunities to strengthen the position of single businesses, especially SMEs. In fact the Trail was perceived as a means to encourage SMEs to collaborate and to become more innovative while benefiting from cooperation in regional, national and international marketing concepts. One stakeholder involved in tourism planning commented: “... coming back to those small operators that we are looking at to get involved:

they are the ones that can drive it [the Trail] from the regional and international perspective.”

The Trail was mentioned as providing opportunities to attract a broad audience including, domestic and international tourists (N=2, n=3). Independent tourists who are sometimes planning their routes as they travel were mentioned by one of the mayors as an important market for the Trail:

The concept is really good ..., it gives an opportunity for self-travel, which is key to NZ, ... more than 90 % [of the travellers in NZ] organise their travel themselves. They might have an end destination, but between those points they've got choices about where they go. If you are in a camper or [something similar], it certainly would be a travel option.

One of the tourism planners pointed out that “People who travel want to see how other people live and work in the area where they travel to.” The Trail concept provides visitors and locals with a sense of place, strengthens the marketing brand and funding potential for the Trail and brings everyone together to work towards the same goal. As one representative from an information centre commented: “The Trail can create more opportunities for businesses: more people - more wealth, but it's up to the businesses to provide a great product and service.”

Stakeholders pointed out that the Trail matches the region's existing focus on the marine environment (N=8, n=14). The Trail was described as a chance to increase the already unique tourist experience and turn aquaculture and seafood into a main regional attraction. One stakeholder representing an educational institution said: “it is giving the region a really neat focus.” Interviewees pointed out that there are many complementary interests that could be linked with little effort to create major benefits (N=6, n 7). One of the government organisations pointed out that the Trail has the potential to direct people's attention to available points of interest: “its added value to existing things.” One representative from a district council said that the Trail fits existing regional development strategies and the district plan.

Furthermore the variety of operators involved in the Trail concept at present was discussed (N=12, n=16). A representative of the tourism industry stated:

“When I think about seafood and look at this brochure, there are relatively few experiences available here which have a strong seafood brand.” One Māori representative said: “The connection to tourism other than promoting food and beverage is not as obvious to me as perhaps it could be.” Stakeholders expressed the need to include a higher number of worthwhile experiences. To become successful and reflect the industry they identified the need for more interactive and special attractions related to aquaculture (such as access to actual marine farms). In general the concept was described as lacking a strong enough seafood focus at this stage.

In fact, major concerns about the Trail’s concept are linked to the challenge of unifying the different perspectives from aquaculture and tourism. Tourism planners commented: “Concerning seafood there is a huge opportunity in our region, huge strengths, but it seems that tourism and aquaculture approach seafood from different perspectives” Seafood operators identify seafood as an export product primarily; tourism looks at seafood as an attraction to the destination.

During the interviews it became obvious that a clear framework is needed to regulate and limit membership of the Trail. Four stakeholders involved in tourism planning pointed out the necessity of standards and certifications (a common practice in the NZ tourism industry) to legitimise and distinguish the Trail as a unique product and at the same time differentiate those businesses that are part of the regional cooperation (partnering on providing unique seafood experiences) from those that are not. Additionally one of the aquaculture planners referred to the incentive for involvement:

As far as our members are concerned, there is still a generic dimension to it, I mean, you want to be part of this, we take this donation, and you are welcome. It becomes a commercial one and that takes it to the discussion in terms of who should be a part of it, who wants to be a part of it and the cost/benefit things.

Standards, certifications and limits to membership can also add incentive to involvement in the Trail by creating a product that businesses view as valuable and unique for their marketing and sales (and therefore potential for income).

However, one representative from the aquaculture industry suggested different levels of involvement:

You also stagger what those opportunities might be [by saying...] 'I can appreciate that you just don't have the money to put into it as these guys do, but here is something that you can do. We can help you to set this up.'

By linking the peripheral regions in the form of a network, three stakeholders suggested that central locations (e.g. Picton, Havelock, Nelson) along the Trail should become strategic information and communication channels for industry members, locals and visitors.

Interviewees (N=3, n=3) also highlighted the Trail's potential for becoming an effective political instrument; informing and educating tourists and locals about the various facets of the industry, the impact on employment and ecology in the region, and the brand recognition of the Trail overseas through international marketing and exports.

Discussion

The Trail concept highlights the presence of the aquaculture and seafood industries in the region by linking them to the tourism industry. A themed touring route provides businesses in the Top of the South with opportunities for building partnerships, enforcing regional tourism development, and increasing regional economic benefits (Hardy, 2003). The Trail further provides the destination with the opportunity to create authentic and memorable tourism experiences (MacCannell, 1973; Meyer-Cech, 2005). The production and processing of local seafood products has the potential to become a focal point of interest in the Top of the South and turn the industries into mobilising key actors (Hjalager et al., 2008). Consistent with stakeholder observations, trails are also known to assist remote areas as a means to advertise the communities, improve economic performance, and encourage SMEs to collaborate to become more competitive (Meyer-Cech, 2005).

The Top of the South Trail concept also supports the increasing interest of tourists in culinary experiences as suggested by Yeoman (2008a). Local food and drinks are often important elements in providing high quality experiences at a

destination, representing part of its culture and heritage (Yeoman, 2008b). Food and drink are often used for marketing and promoting a region's uniqueness to attract visitors who want to experience the authenticity of a place (Hall & Mitchell, 2001; T. Simpson, 2008). In particular, special interest tourists are interested in experiencing a sense of the place and interacting with locals (Derrett, 2001, p. 3). Culinary tourists perceive drinks (especially wine) and food as part of their lifestyle. For the gastronomic tourists the key motivation for travel is food and drinks (Hall & Sharples, 2003). Stakeholders seem to easily recognise these attributes of the Trail.

The Top of the South Trail provides the regional tourism sector with a tool for targeting a new niche market (those interested specifically in seafood-related experiences) and provides a good example of how food tourism offers visitors the opportunity to experience the food chain from production to retail (Deale et al., 2008). Stakeholders seem to recognise that food tourism adds value to both travel destinations and food producers and that food is the link between a region's nature, its culture and cuisine for visitors who are looking for a new tourist experience (Hjalager & Richards, 2002). Stakeholders' support for the concept as a relevant economic development strategy was also based on the recognition that seafood companies can use the Trail as a marketing strategy with visiting tourists to increase awareness of New Zealand seafood in their home countries. The Trail was further understood as a good means to drive destination branding through collaboration. In general, interviewees saw the Trail as providing a good base for an innovative change that has to be developed in an appropriate manner.

The Trail concept facilitates the sharing of aquaculture and seafood expertise with an entirely new sort of customer (Derrett, 2001). This positive perspective among the interviewees is important in that the interviewees are representative of the managerial environment which would need to be supportive of the seafood and tourism concept as a means to engage businesses.

Interaction between seafood businesses and tourism might lead to challenging issues such as safety (of visitors at processing plants or on boats), meeting health standards in production facilities, production of public-oriented information (communication of science and seafood processing concepts to the general public), and customer services focused on seafood consumers rather than wholesalers (Everett, 2008). In addition, possible marine resource conflicts might occur as the same spatial area on the waterfront or in coastal waters would be used for more than just one industry purpose. Therefore integrated coastal management strategies and clear regulations regarding marine spatial uses (Cicin-Sain & Knecht, 1998) as well as strong collaboration between the businesses and planners (Fyall & Garrod, 2005; Singh & Singh, 1999) would be important.

To ensure the long-term success of the Trail concept and to protect it from over-commercialisation, the environment's carrying capacity needs to be balanced with the overall economic benefits as defined by a deliberated strategy. Overall the innovation performance was expected to benefit the region, its residents, marine industries and visitors (Hjalager et al., 2008).

5.3.3 Outreach/Education

The theme 'outreach/education' outlines stakeholders' thoughts about the Trail as a tool for informing and educating visitors and the community about aquaculture, as well as about the dissemination of the Trail's brochure.

The Trail concept was perceived as providing an opportunity for outreach and education. Interviewees representing aquaculture, tourist information and resource management agencies (N=6, n=14) pointed out that the Trail with existing attractions could become a means for informing visitors, residents and import agents about the quality of New Zealand's aquaculture products, the aquaculture and the marine farming industry in general, the industry's sustainable practices and operations, and thus develop more understanding and positive attitudes. For example, interviewees said: "There is a lot of misinformation about the effects of aquaculture. Some of it is real, some of it is not so real. By being involved they can show a different face to aquaculture."

However, respondents described New Zealand's aqua farming as one of the safest in the world. Besides the natural and environmental opportunities unique to New Zealand, large investments from industry and government help to control the water quality at all times and ensure that the mussels are sustainably harvested. Stakeholders (N=2) representing the aquaculture industry commented that knowledge and attitude was also important to informing decision-making and other behavioural outcomes:

In any good legal framework, the more information you give to people, the more they can make an informed decision. And that is the key for us in terms of legitimacy. ...There are a lot of misunderstandings about aquaculture around and for us, making sure that people get the right information to make decisions [is important].

If you get people and you can remind them of what the value of your industry is at a point where they have an engagement with it ..., then you are also reinforcing in their mind what they are personally sacrificing. Then next [time] they are maybe asked to sign a petition to stop the development of a new aquaculture farm, ... it's a very quick and easy decision to sign it ... these people's arguments are quite convincing. ... The more we can remind people that value to them the more they might hesitate with the pen, and think about where all these mussels come from if they sign these petitions.

Evidence that the Trail can provide an opportunity to counteract the negative picture people often have about the seafood industry was described by one of the seafood industry representatives:

We did this [a field trip]. We took high level bureaucrats (the advisors, the politicians) down to the Marlborough Sounds and put them on a boat and spent 5 or 6 hours going around the Marlborough Sounds, looking at salmon farms, at mussel harvesting, having some really good seafood, plenty of wine and in the end someone of the aquaculture industry stands up and asks you, how many mussel farms did you see? The media says maybe 6 maybe 7. And then it's: No, we passed about 100 – 150. It is good that they realise that there are about 250 farms out there, they have passed 150 and just recognised half a dozen. If there is the opportunity for the general public to engage with aquaculture and be able to recognise that actually you barely notice these things.

Comments about the brochure focused on a need to understand who the brochure is for and its message. Some wondered about the definition of the actual target group (N=2, n=5). It was not clear to the interviewees whether the brochure is for people who are interested in the culinary experience or in learning about seafood, locals, tourists, or both.

Furthermore, the brochure was not perceived as sending a distinctive message to potential customers (N=9, n=20). It was pointed out that some information was missing on the brochure such as a lack of information on price and the absence of attractions, especially in the Nelson region. The accuracy of information on the brochure was also challenged. The same stakeholders suggested that there was a need to create a more professional design, to make it personal by adding quotes from people who had experienced the Trail, to develop a 'driver-friendly' design with a hard cover and to provide a more detailed map. One tourism stakeholder commented: "There are a lot of contrasting messages here, about the little boy fishing, the mussels, diving, kayaking, it's all seafood-related, but it does not provide direction."

The Trail was also perceived as a valuable communication tool for specific issues. For example, some suggested that positive aspects of salmon farming should be discussed, such as that the King Salmon in New Zealand is an introduced species and that there is no threat of genetic degradation of a wild population. Further, stakeholders noted that the cultural aspect of Māori heritage and their link to the fishing industry was missing. They also noted that the brochure was too limited and did not provide a proper overview of available attractions or additional media instruments, such as a website, and that interpretive signage are necessary to get the complex messages across. The interviews demonstrated that there is collaborative support for increasing the outreach of aquaculture-related information as demonstrated by the technical support offered by one industry association to run a Trail-related website.

Furthermore, the Trail was perceived as providing optimal motivation to create further informative experiences such as eating mussels directly out of the water, involving the mussel farms as attractions and creating more opportunities to buy local seafood (N=9, n=14). Consistent with discussion about the value of linkages between seafood and tourism in defining the destination image, it was mentioned that the industry and officials should use every occasion to promote the purity of New Zealand aquaculture products through the Trail-related experiences as described in the example below:

We had some Chinese people here recently, some researchers and we took them out in the Sounds for a day and they kept looking at all these boats with the bags of mussels taken from the mussel farms in Havelock to the factory there. And then we pulled up a few mussels and had them for lunch and they were very reluctant to eat these things and I couldn't understand why. Until we worked out that in most places in the world you have to take mussels out of the water and put them into a giant swimming pool before you can eat them whereas these things are coming straight out of the water. ... every 15 minutes everybody out on these mussel farms knows whether their product is safe to eat or not through contamination ... because we have remote sampling gear. And then we've got cell phones and our backup computer here. All that is funded by the industry

However, stakeholders (N=3, n=3) were aware of the limitations of information provided by the Trail brochure. Too many technical aspects and details could endanger the project. Consequently the need to keep the information comprehensible and as simple as possible was noted as being of importance. Furthermore, the interviewees emphasised the importance of remembering that people on the Trail are using it primarily for recreation/leisure and not education. Their interest in seafood means that facts about seafood must be included but not stressed too much. This need for an appropriate balance was suggested by one of the seafood industry representatives:

I don't want to get too political. You are focusing on some people who want to have a good time. They don't want to be butchered by lobbying while they are out having a good time and something nice to eat. In just a small way it could be reinforced a bit with a few words of endorsement of that key message that aquaculture is not impacting on the environment and it's not impacting on the aesthetics of the environment.

One of the challenges mentioned was to find operators that are able to 'translate' and transfer the relevant information in an appropriate manner as one of the stakeholders involved in aquaculture said: "... the language can be technical. For the environmental impacts it has to be put in terms of somebody running a tour, they need to be able to translate and interpret that information."

The communication of information, especially from publications that are already available, was also identified as important. Stakeholders (N=5, n=12) pointed out the necessity of giving correct, comprehensive information to tourists and residents. Although information is available to the public as well as

to institutes and schools, stakeholders noted that it is difficult to use and distribute this information to where it is most useful.

We have got a government website (to get the information out to the public), and it has lots and lots of information on it, and as part of that there is a link/sublink to a whole list of stakeholders for all these different groups who want information, when you are on a site, it opens up and tells them.

NIWA has a whole bunch of publications that ... come out every month; there is always something in there about aquaculture and what we're doing with it. And I know they go out to schools but maybe they don't get to those organisations and there are so many of them. You wouldn't know which ones to target anyway properly.

However, responses indicated that public interest in aquaculture and fish farming is highly welcomed:

Last month we got 3000 hits - and 2232 downloads of documents [on the MFISH Aquaculture website]. Which is a lot of documents - I haven't got the stats. We've got things like the effects of fish farming, and it's a lecture on the effects of fish farming, and how that is been done in NZ. It includes not just a lecture in fish farming, but all the developments we've done on fish farming in NZ for 25 years and there is one shellfish and one on the other species. And a lot of these get a lot of downloads.

Stakeholders involved in aquaculture and fisheries mentioned that making locals aware of the Trail concept is important both for local outreach as well as dissemination to visiting friends and family as the two quotes below illustrate:

This [the brochure] isn't really for locals, and so for locals we probably would not know it unless I went to tourist information and picked it up, this is more for people going around. What [about] when locals have visitors from overseas? ... It's only first or second generation in NZ, lots of foreigners as well come over and visit, ... why don't they just send them to a local residence? So they have them.

This [the Trail] should be marketed to the domestic traveller. Address those regional issues of spatial access for the industry. I think it's really going to be a domestic focus. Because the people who are going to make the decisions about whether you get your aquaculture farm are the politicians, and the people who the politicians are listening to, whether they are regional or national, are the voters, and the voters are the people you need to be reiterating to and reinforcing the value of your experience with aquaculture, [that] it's you who sacrifices when it comes to signing a petition.

Some believed it is critical to discuss and compare the pros and cons of aquaculture products via the Trail. One interviewee pointed out that politicians

and officials have to act neutral, while at the same time industry and farmers should work with local councils and residents to clarify the positive features of aquaculture instead of offending them.

Overall, stakeholders pointed out that there are limitations to what the Trail brochure can or cannot include, but they envision more outreach and education potential using the Trail. The scope of the Trail has to be discussed and regulations or standards should be drafted and deliberated over by a local team of appropriate people.

Discussion

The tourism and aquaculture industries are important sectors for the Marlborough/Nelson/Golden Bay region (Marine Farming Association, 2005b). Although stakeholders have different legitimate interests in the region's future development (K. Simpson, 2001), they realised that international attention can only be achieved through networking and cooperation on various levels (Lebe & Milfelner, 2006). Stakeholders' thoughts about the Trail as a tool to attract, to entertain and to inform locals and visitors about aquaculture were positive overall as it was realised that resourcing reliable information and raising awareness are essential to establishing effective cooperation between the aquaculture and tourism industries with their own particular interests. Outreach/education is an important component to the overall Trail concept to creating linkages between seafood and tourism with respect to destination image linking to enhancing export market (Fyall & Garrod, 2005; Singh & Singh, 1999).

The possible and necessary breadth and depth of information that can be transmitted by the Trail through open resource access was discussed related to the possible global and cross-sectoral outreach as a chance to increasingly attract national and international attention (Hjalager et al., 2008). However, the physical and staff-related conditions of single businesses were described as critical factors that need to be improved. Consistent with Hardy (2003), linking the different industries with a touring route provides a good opportunity for

effective marketing and networking and adds to the capacity of the Trail to serve as an educational and outreach tool.

The study showed stakeholders' awareness of tourists' interest in real and virtual experiences, as discussed by (Jodice & Norman, 2007). According to the interviews the region does not offer the possible variety of tourist experiences related to the marine environment such as buying local food, availability of information about the aquaculture industry, access to the production sites of the industries, festivals, boat trips to mussel farms, and exhibitions. The Trail appeared to support the idea of encouraging the development of interactive and practical experiences (Government of Newfoundland and Labrador, 2005). Also, the existing variety of operators linked through the Trail is limited at this stage. In contrast, the Australian Seafood Trail involves many activities such as charters, seafood tours, festivals and information tours guided by local students (Tourism Eyre Peninsula, n.d.).

Pine and Gilmore (1999) suggest that to take advantage of the experience economy it is important to balance the amount of information that is provided to potential customers. The limitations of having a brochure justifies the need for extensions such as a website and interpretive signage as a means to go beyond these limits (Hardy, 2003). However, if the Trail expands in partnership and sponsorship, outreach expands through other extensions, it will be important to maintain consistency in the educational messages and define strategies for reducing potential for biased information.

The study pointed out that there is a conflict created by the yet undefined target market group (i.e., domestic, international, business, and local residents) for the Trail. Stakeholders especially of the aquaculture industry were not sufficiently familiar with the different segments and categories of culinary tourists (Hall & Sharples, 2003). This limits understanding of the potential benefits from and strategies for linking the seafood and tourism industries through the Trail. Further evaluation is needed to determine how the Trail could attract more visitors, result in economic benefits, and take advantage of

media attention to communicate cultural information and promote a positive industry-image (Rusher, 2003).

The study demonstrates that the present level of awareness of the Trail's brochure is low, because the brochure, its content and dissemination process are not yet sufficient. In general, the effectiveness of a brochure as an information tool and guide for potential customers is considered a good start for further marketing strategies (Hjalager et al., 2008).

Most importantly, there is agreement that the Trail assists with sending a positive message about linking the industries, and research suggests this will inspire interest and community support (McCool & Moisey, 2001; Mitchell, 2001; Moscardo, 2006). The Aquaculture and Seafood Trail can assume a leadership role in driving additional innovation and collaboration by providing the opportunities for the aquaculture industry to bring locals and visitors in touch with the industry and raise more understanding based on a recreational intention (Derrett, 2001; Douglas et al., 2001).

5.3.4 Marketing

The theme 'marketing' covers response statements that address the promotion of the Trail, the existing brochure as an advertising tool, and several ideas of how to improve the national and international marketing strategy for the Trail.

Respondents indicated that the whole region lacks promotion of the aquaculture and seafood industries in regional, national and international marketing (N=5, n=7). Festivals have been cancelled, and regional promotion campaigns and opportunities have not been implemented by either the aquaculture nor tourism industry, to promote local seafood. One aquaculture stakeholder commented:

One of the things that we have been guilty of, over the years, most definitely, is not promoting ourselves enough, ... [we are] a bit reactive, we don't feel it a lot on the association subscription basis, and now it's got much more [of] a regional focus, [but] it used to have more of a national focus. It's interesting.

This may partly be due to the fact that marketing of both aquaculture and tourism products is largely targeted to international or non-local customers and seafood is primarily an export product in New Zealand. Global marketing was perceived as important to attract international tourists, achieve economic benefits and regional brand awareness, create word-of-mouth advertising, and make the Trail better known and its concept successful. One district council representative suggested that it is challenging to convince marketing agents and potential customers of local values and excellence: “There isn’t any understanding by the overseas marketing people that you have current capacities at any level. That’s all about increasing the number of tourists.”

The Trail and the brochure were described as providing a good opportunity to improve the destination’s regional, national and international marketing strategy (N=7, n=12). Small businesses were described as lacking marketing knowledge about international outreach: “Some of the members understand commissions, but they don't really have advertisements overseas.” Summarising the regional availability of local seafood was described as having potential to become an attraction for the region. There is an opportunity for marketing to take advantage of the exceptional regional seafood available from the local marine environment and to communicate a strong integrated image that can be advertised overseas by international marketing organisations. One stakeholder commented about the international marketing of wine and seafood together:

When Tourism NZ is marketing offshore, they will also work with regions and they’ve got the new what they are calling International Marketing Allowances. So the two regions and Nelson and Marlborough are one of those, they come together and they create their little point of difference there, their identity, I think Nelson is sort of based on Sauvignon Blanc and that goes along with seafood. And then they go offshore and they go to tourism NZ and they tell them, this is the product we are offering, this is how we build on tourism.

Respondents also suggested that regional comparisons might encourage improved service and marketing of the uniquely local operators. The combination of the aquaculture and tourism industries through the Trail was emphasised as providing an opportunity to build on the existing ‘original

labelling' of products to achieve an international reputation, and create a competitive advantage over the whole country as pointed out by one city government representative:

Certainly there is a whole lot more that we could do with the connection between aquaculture, seafood and tourism. In fact here is a region where we do very poorly in terms of promotion, a sort of food basket, we don't have in NZ a concept that promotes local food, and we could do much better there.

The Trail and its brochure were also acknowledged as supporting elements to market the regional variety of seafood to visitors as well as to locals. The brochure as a marketing instrument was mentioned as providing a good start to targeting visitors interested in local seafood products (N=4, n=6).

Stakeholders (N=3, n=12) recommended creating a consistent concept that supports customers' recognition of the Trail: "The Trail does a very good job in promoting aquaculture and seafood in the Top of the South, but we need to back that up." Interviewees suggested supporting the brochure with an up-to-date marketing website with the latest prices, menus, contact details and opening times. Stakeholders identified that collaboration through the Trail could result in a variety of packages that could be sold to different target groups. Interviewees (N=2, n=3) pointed out that these kind of gaps are a convincing argument for supporting SMEs in joining the Trail concept.

Marketing the Trail to participants is another challenging issue mentioned by stakeholders, for example:

Marine farmers are good in marine farming. There must be money invested into marketing experts for promotion. ... MFA must work together with supportive people, but at the end of the day everyone is asking: what is my outcome?

Market research through university support was also mentioned as an opportunity for Trail-related marketing development in the region. Using the Trail to support marketing partnerships would provide an optimal chance for international collaboration across the aquaculture and tourism industries (N=4, n=8). Stakeholders mentioned the importance of supporting further research to justify the financial investment into any new marketing approach. For example,

the Trail offers great opportunities for research in cooperation with the university, as outlined by one of the tourism planners:

We would be really interested in working with [NZTRI] on that, if you did the market research and then came to Nelson to release the results of the market research and painted the picture of where opportunities were, particularly based around the seafood events or seafood product developments.

Additional interviewees pointed out the need for research to inform development of tourist profiles based on tourists' interests in local seafood. The determination of the target market groups was stated as a chance to attract various people with different backgrounds (N=7, n=10). Residents were considered potential customers, as well as serving as a direct marketing tool to help spread information about how to access the regional identity linked to the aquaculture and seafood industry.

They [locals] would find it useful ... one of the things I do as a resident, I haven't got this one, but I generally have a bunch of brochures and the like at home and have a general knowledge. If somebody comes and visits me, I say, look guys, I could recommend this or that. Locals generally are - quite a lot of locals - having had an experience of Marlborough would point people into the direction of things.

The Trail should also focus on marketing to environmentally concerned visitors who often share local values, as a representative of the Māori organisations pointed out:

That is the type of tourist we are trying to attract in NZ (who are just travelling and want to get good food). They have a social conscience and are prepared to pay a little bit more for products because they know that it's transparent in terms of how it's grown and harvested, packed, the environmental community, I think that's important and that should come through a little bit more. That is an important positioning thing; we don't get the loads of buses necessarily coming to this region. Tourists, who do come here, choose to do this quite epic journey on this road and they have got a set of values that are often quite similar to our own. We should pick up on that a little bit more.

Discussion

The promotion of the Trail was perceived as offering several opportunities for collaborative marketing strategies and networks beyond the existing industry sectors in the different communities (Hardy, 2003; Meyer-Cech, 2005). However, the challenges of assuring fairness in terms of funding and managing

the Trail as an innovation product and to reconcile the various aspects to a stage where the majority of people involved are satisfied were identified as organisational challenges similar to the Nordic innovation system (Hjalager et al., 2008).

Because the Trail holds such strong potential marketing value, the risk of monopolisation due to different levels of marketing expertise and knowledge of people involved in the Trail and its management would have to be controlled. Agreement on common goals and planning directions requires the participation of the community, industry stakeholders and relevant government agencies (Ruhanen, 2007). A good example is the Scottish Seafood Trail which is mainly driven by its members without any dominating government organisation. Their target group is travellers that have an interest in local seafood specialities and share the same values as the operators (Visit Scotland, 2009).

Delivering the 'right' information in proper depth, promoting and commercialising local attractions and afterwards splitting the cost of advertisement and packages in an agreed manner could result in organisational challenges (Fyall & Garrod, 2005). There is a need to build off MFA leadership and develop project leadership on a community-wide basis and introduce regulations (Okech, 2006). For these reasons, the Australian Seafood Trail introduced a reasonable initial fee, an annual membership, and a two percent co-operative marketing levy on total tour revenues. This results in a brochure, a website, cross-promotion, and attention from international media (South Australia TEP, 2007).

The research results pointed out a need for strong collaboration to offer commissionable products, to achieve an integrative marketing strategy and to balance the different leadership levels of Trail participants (Derrett, 2001). TEP, which initiated and manages the Australian Trail, introduced a 'seafood & beyond rewards card' that combines Trail activities of different participating operators to package and increase the revenue of each member through collaborative marketing strategies (Tourism Eyre Peninsula, n.d.). Based on its strong marketing concept the Australian Seafood Trail also created a strong

destination image (South Australia TEP, 2007) which stakeholders in the Top of the South Trail also mentioned as a desired result for them. The status of single regional brands in the Top of the South that have already been created for overseas markets must be considered when thinking of a corporate marketing strategy. The current image of the region, in particular the Marlborough area, is as a wine destination and probably has to be utilised to further promote the region along with local aquaculture and seafood products to create a strong integrated regional brand (Hall & Mitchell, 2001; T. Simpson, 2008). Although the existing image could be used as an opportunity to 'jump on', themed trails have to fit into the existing brand concept so as not to damage a stable brand (Mielke, 2000).

There is a need for an increasing focus on the shared cultural aspects and the region's character as a means to develop place-based attachment among visitors, rather than producing the Trail as just a regional marketing tool. The public sector role in the Trail has been recognised as an important factor (Hjalager et al., 2008). Also, residents are more likely to adopt the Trail as an innovation if they identify with the regional message and feel they will benefit directly or indirectly from its development. Only then more integrated and sustainable forms of tourism can be provided (Rogers, 2003).

However, to make the Aquaculture and Seafood Trail in the Top of the South successful, professional advice focused on identifying tourist demand and the drafting of a coordinated marketing strategy is needed to achieve the highest possible outcome of cooperation on regional, national and international levels (Timur & Getz, 2008).

5.3.5 Cooperation

The theme 'cooperation' reflects stakeholder's thoughts about the Trail and the brochure as a driver for increasing cooperation between the aquaculture, seafood and tourism industry.

Interviewed stakeholders' mentioned that through community based collaboration there is potential for building a network to support opportunities for further development of the Trail (N=6, n=13). According to one

representative of a council “[the Trail] is actually weaving businesses together to have a stronger hold, so there is a positive side to it - its added value to existing things.” Stakeholders pointed out the existence of optimal conditions for increasing culinary tourism in the region. For example, they recommended including the wine and beer industries in the Trail concept. The combination was perceived as easily realisable: “The connection between our wine industry here and the crossover to food, wine, beer – that would actually be quite easy to do; to sort of connect the beer, wine and seafood industries to get some food-basket concept.” The cultural link to Māori was also mentioned. It became obvious that the Trail concept offers optimal conditions to bring together local culture, traditional recipes, cooking styles, a ‘real experience’ and also information on the health aspects of local products. Cooperation of educational institutes, the aquaculture industry, Māori and tourism showed great promise for the Trail’s development, as suggested by a local educational institution interested in developing a tourism curriculum linked with Māori heritage: “They [Māori] could build that experience of a destination really. ... like the mussel boys do, the modern use of cooking and take it to the maraes.” Overall stakeholders (N=5, n=8) noted that cooperative links were expected to empower participating businesses on a national and regional level to create new synergies as described by one of the council representatives: “And I’d hoped it’s not just another side of a brochure, it’s some cohesion with the tourism industry so things can stitch together, so that everybody benefits from the synergy that this joins into.”

The combination of existing attractions and possible participation in the Trail through membership was identified as something encouraging businesses to improve their business model by building in collaborative strategies (N=3, n=6): “It’s certainly an opportunity for us to develop some more interactive tourism/seafood/aquaculture crossover” as one mayor said. The stimulation to improve or create new attractions was expected to contribute to the region’s economic well-being, to further develop and at the same time increase the potential to advance the region’s attractiveness and strengthen the businesses’ competitiveness.

Stakeholders also pointed out that the Trail is both reliant on collaboration and at the same time drives collaboration (N=6, n=14). The participation of businesses, government support, integrative partnerships across the different governments and industries, and the constant support of the community appeared as absolutely necessary to make the Trail work successfully. Encouraging economic interdependence was seen as an effective driver for efficient collaboration. The initial support by regional i-SITEs to help in the Trail's promotion demonstrated the local interest and support in the project "They [i-SITE Picton] supported the brochure by displaying it free of charge initially the first year."

Stakeholders indicated that several opportunities can be achieved through collaboration, such as effective national and especially international marketing, regional research projects, and general regional representation. The organisation of regional themed events was mentioned as another option for collaborative support of the Trail as one member of the research institutes pointed out: "NIWA is the major sponsor for the mussel festival so we are a gold sponsor for them." With a little support from everyone, a strong image can be created. One industry representative noted:

It has to be the beginning of a process, when the Minister of Tourism stands up and gets some address wherever he speaks, he just quietly slips in aquaculture as being a natural part of tourism, it doesn't have to be anything more than that, and then they just let it earn the right to be in their industry and vice versa, tourists will take it over themselves.

Using existing networks and technology through the i-SITEs such as the nationwide booking system were mentioned as a good basis for promoting the Trail. The regional marketing alliance was also mentioned as an opportunity; as one of the information centres stated: "The Marlborough and Nelson international marketing alliance - they work together to promote the top of the south internationally, cooperation with Jasons would be good."

During the interviews the need for integrating government and industry efforts was mentioned as well (N=3, n=3). For example, opportunities include linking the different websites on aquaculture to help position the Trail as a regional

attraction. One of the aquaculture stakeholders mentioned there was a need to clarify the roles of government and industry in the Trail:

You have a government website, promoting these things; it won't be very difficult. You could have a section on sustainability, be more if you have a 'wiki' [Wikipedia] on sustainability go and visit www. ... But there is a difficulty for government coming in to promote certain companies.

Stakeholders also pointed out the constraints and challenges for organising the Trail website:

There was a desire that Aquaculture NZ wants to have its own website. They are in the process of developing one, but it sort of becomes a bit hard, because how are you developing your own website when there is already one out there which is supposedly representing you. The other problem is that because it [the website] is developed by a government department it is constrained by the government policies around their websites. So a website for the Aquaculture Industry developed by the Aquaculture Industry is subject to the Aquaculture industry's requirements. A website for the aquaculture industry developed by the government has to comply with the public's state services commission policies and guidelines for our website. So there are some constraints.

The creation of a Trail website will require an understanding of the levels of public and private cooperation and an understanding of how the Internet can serve in an integrative capacity for development. A Trail website was recognised as providing a good opportunity for the different stakeholders to collaborate and compromise on their differences. Even so one respondent noted some problems with linking between government and industry websites: "The consumer has no idea whether it is a government website or not." As a result cooperation through informal agreements might work better than through formal agreements, at least among the small businesses, as a respondent from one local information centre pointed out: "Links between aquaculture and seafood are more informal than formal."

Discussion

Stakeholders identified the Trail as innovative and favourable for the peripheral region in the Top of the South and further as a driver for increasing cooperation between the aquaculture, seafood and tourism industries (Meyer-Cech, 2005). Linking the industries was pointed out as offering several new opportunities for the region (Rogers, 2003) such as economic development and value, improving

the existing image and supporting sustainable destination development (Hjalager et al., 2008). The Scottish, Australian and American Seafood Trails demonstrate the benefits for each of the participating operators. A conjoint website, brochure and general advertisement, as demonstrated by the Australian Trail, can increase the Trail's role in economic development, making the Trail concept attractive for businesses involved in the seafood industry (Food Trekker, 2007; South Australia TEP, 2007; Tourism Eyre Peninsula, n.d.; Visit Scotland, 2009).

The Top of the South region has a complex organisational government, and a compound tourism and aquaculture industry structure (Local Government, n.d.; Marine Farming Association, n.d.-b; Tourism Industry Association New Zealand, n.d.-b), that creates challenges for cross-sectoral collaboration and linkage of peripheral communities as a regional endeavour. The evaluation of the present situation and the identification of innovative development strategies showed that collaboration is supported by central government agencies and driven by economic and infrastructure advantages of joint projects (Local Government, 2007a, 2007b, 2007c). However, in addition to the expected complications of collaboration among several individual businesses, the study also emphasised the difficulties of dealing with existing conflicts within the industries and between the government and the industry. The different interests and levels of power and influence of the diverse parties involved were perceived as difficult to balance through the Trail, due to issues of equality and equity. In the case of the Australian Seafood Trail the government is supporting the Trail project that is driven by the tourism industry (rather than the seafood industry in the case of the NZ Trail). The Australian Trail also has an executive working group that meets twice a year with representatives of the seafood operators and the tourism industry (South Australia TEP, 2007). This suggests a more integrated approach is possible.

Stakeholders expressed a variety of opinions about the different aspects of the aquaculture and seafood industries that relate to the sustainability of the Trail. Focusing on reputation, efficiency, sustainability, the economic situation, industry interdependence and future opportunities, the results illustrated that

optimal features as outlined in the Nordic innovation system (Hjalager et al., 2008) exist for further developments. In fact the Top of the South Aquaculture and Seafood Trail has a chance to become a platform for the cooperation of businesses that are involved in the aquaculture, seafood and tourism industries. Synergies can further result in staff training related to marketing, promotion, tour guiding, business planning, and customer service (South Australia TEP, 2007). Even though there was limited knowledge of the Trail, SMEs still have the potential to grow this opportunity and improve their efficiency in terms of commissions, formalities and professionalism, as demonstrated by existing Trails (Hardy, 2003; Meyer-Cech, 2005).

Buhalis and Costa (2006) suggest that stakeholders have to make use of innovative management and planning techniques to respond to several environmental, economic and socioeconomic challenges created by globalisation, demographic and climate change, technology, safety and security issues, and the deregulation and liberalisation of markets. The Trail concept appears to be an effective instrument to combine existing strengths of the aquaculture and tourism industry and become an effective tool for the regional representation of the peripheral communities in the Top of the South (Hardy, 2003; Meyer-Cech, 2005; South Australia TEP, 2007; Tourism Eyre Peninsula, n.d.).

5.4 Summary

This chapter has provided an overview of stakeholders' thoughts about the challenges and opportunities the Aquaculture and Seafood Trail creates for the destinations' development. The interviews provide important background information to understand and interpret the conditions to link the seafood and tourism industries.

The four themes related to the context of the study and the four themes related to the Trail itself were explained and prioritised according to the number of responses made by the interviewees. While stakeholders support the Trail idea in general, they perceive weaknesses in networking, coordination and marketing. The fact that 'cooperation' was discussed the most (in total

n=114) either in terms of opportunities for community and industry development or in terms of challenges created by the variety of parties involved points to the importance of increasing coordinated collaboration. There is a need to improve relationships between public and private stakeholders and institutions involved in the tourism and aquaculture sectors.

The data analysis showed that the emergent themes correspond with the fundamental elements and the characteristics of the innovation performance (Figure 2.3) of the Newfoundland and Labrador's peripheral innovation model (Government of Newfoundland and Labrador, 2005), and at the same time with the driving forces for innovation and the outcomes of the general framework of the Nordic Innovation Centre (Figure 2.2). Additionally the characteristics of a successful innovation system (Table 2.4) were reflected in the study. The goal of an innovation performance, in this case the MFA's Aquaculture and Seafood Trail, is to increase economic value, productivity and social gain (Hjalager et al., 2008).

In general, initial interview findings suggested positive support for the continuation of a seafood Trail in the region. The main strengths, weaknesses, opportunities and threats of the Trail concept are summarised in the form of a SWOT diagram in Figure 5.17. The analysis demonstrates that there is potential for the MFA's Aquaculture and Seafood Trail to become an important regional networking innovation. Stakeholders agreed that linking the tourism and aquaculture industries offers several opportunities in terms of destination development. There are numerous opportunities by linking the aquaculture and seafood industries in addition to their products. The industries in this region are a unique resource in the Top of the South for supporting regional development and economic growth.

	Positive	Negative
Internal Factors	Strengths	Weaknesses
	<ul style="list-style-type: none"> • innovative and favourable • driver for increasing cooperation between aquaculture, seafood and tourism industries • stakeholders support Trail concept in general 	<ul style="list-style-type: none"> • limited communication of Trail • region lacks in networking, coordination and marketing
External Factors	Opportunities	Threats
	<ul style="list-style-type: none"> • economic development and value, improving existing image and supporting sustainable destination development • attractive to businesses involved in seafood industry • central government agencies support collaboration • economic and infrastructure advantages of joint projects • chance to become platform for cooperation of businesses that are involved in the aquaculture, seafood and tourism industries • creation of a variety of synergies (staff training related to marketing, promotion, tour guiding, business planning, customer service, etc.) 	<ul style="list-style-type: none"> • trail region has complex organisational government, and a compound tourism and aquaculture industry structure → complications of collaboration among several individual businesses • difficulties of dealing with existing conflicts within the industries and between the government and the industry. • different interests and levels of power and influence of diverse parties involved

Figure 5. 16 Main research results related to Trail concept

Based on the research results it became obvious that the case study site supports the forces of innovation. At the same time there is a need for improvements. It was also pointed out very clearly that further developments require effective management of facilities, safety issues and capacity control to be capable of supporting the integration of tourism and aquaculture in the peripheral communities in the Top of the South. Results strongly point towards the need for more organised structures and consistent regulations to make regional development accessible for community members.

Respondents' understanding of these issues demonstrates the importance of their role in building support for collaboration and networking for regional tourism development, particularly in regard to creation of the seafood Trail. Strong cooperation and clear policies are necessary to develop a framework that regulates responsibilities and gives guidance to participants. The existing

relationships between policy, planning, science and industries provide a basis for the Trail's long-term success. However, the current infrastructure including accommodation, public transport, and access to the region and to the potential attractions has to be improved.

The interview analysis related to the Trail resulted in several aspects that have to be considered to achieve successful innovation performance. Interviewees thought that the concept of linking the area fits into regional development plans. Improvements to the Trail brochure were felt to be necessary, but in general it was also described as a good start for further expansion. Linking the industries was mainly perceived as improving access to local products, information about the marine industries, the regional economic development and the image profile of the destination.

Overall the analysis of the qualitative and quantitative research data clearly accentuated that there is considerable potential to link the tourism and aquaculture industries and establish a brand based on seafood tourism. Initial findings suggested positive support for the continuation of the Aquaculture and Seafood Trail in the region.

This study illustrates that key stakeholders perceive a Trail as a good option to inform the public about a particular industry, in this case the aquaculture and seafood industries. The link to the tourism industry appears as a good chance to reach a large target group and achieve national and international attention.

Based on the emergent themes from this research, the integration of a successful trail concept in a peripheral region requires the collaboration of several stakeholders, representing the aquaculture and tourism industries, government organisations, environmental agencies, educational institutes, and community planners. As presented in Figure 5.18 the access options to the region; the economic development of the aquaculture and tourism industries; and the destination image has to be developed to make collaboration possible in the first place. However, the trail concept provides an opportunity to increase knowledge and understanding of marine resources and enhance the region's marketing. Overall the Trail provides regional industry structures to drive

collaboration and innovation and demonstrates that community stakeholders are potentially able to have an influence on regional development.

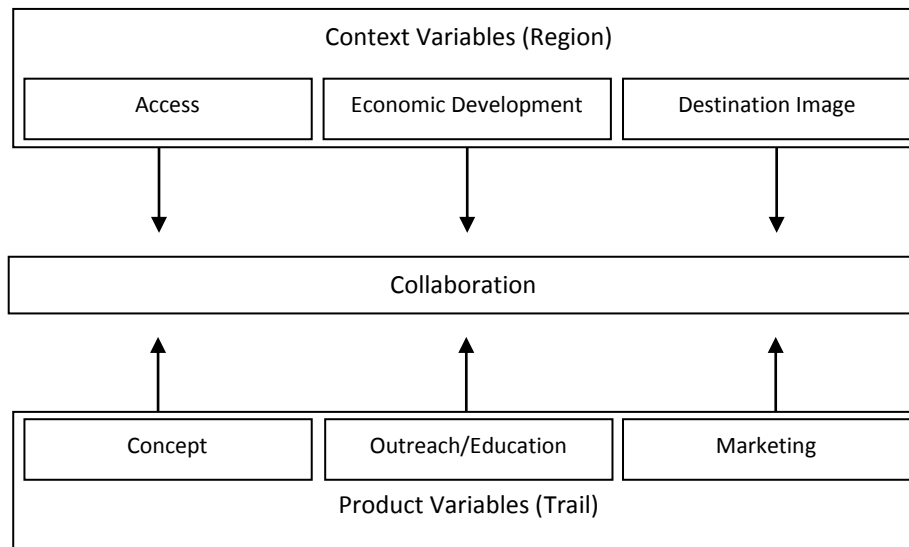


Figure 5.18 **Relation of Emergent Themes**

It is suggested that these variables should be measured/evaluated for similar studies as a means to compare cases in future research.

CHAPTER SIX: CONCLUSIONS & RECOMMENDATIONS

The Aquaculture and Seafood Trail in the Top of the South Island of New Zealand serves as an excellent case study to understand how the economic, social and environmental characteristics of the region have created the conditions for a seafood themed drive trail and how key stakeholder perceptions of linking tourism and seafood point out the interdependence of the private and public sector (Fyall & Garrod, 2005). Comprised of restaurants, accommodation, mussel farms, and fresh seafood suppliers, the Trail's goal was to raise community awareness of the importance of marine aquaculture to the area as a coastal tourist destination. This study looked at whether and why local stakeholders support and provide the conditions for success of the Seafood Trail as an innovative strategy for sustainable tourism.

The main aim of this research was to determine the capacity of the region and stakeholder organisations to support integration of tourism and aquaculture through development of a seafood trail linking peripheral communities. The first objective was to inventory the tourism and aquaculture resources of the Nelson/Marlborough/Golden Bay region. The second objective was to evaluate stakeholder perceptions of the tourism industry and the potential for links between tourism and aquaculture in developing a seafood tourism destination. The third objective was to assess the role of a themed seafood and aquaculture trail in a tourism destination dependent on marine resources and seafood harvest. The final objective was to distinguish a seafood trail in promoting more sustainable forms of tourism development.

Combining the literature review; 22 one-hour semi-structured in-person interviews, and a questionnaire (N=19) led to a more in-depth understanding of the potential for the Trail in the Top of the South. The target population of key representatives of non-profit associations, regional tourism organisations, regional district councils (land and coastal planning), development agencies, and consultants contributed key findings by sharing information about the sector they represent, and their perceptions about tourism and aquaculture in

the region. The interview sample of key stakeholders represented the case study area's main management organisations and assisted to meet the initial aims and objectives.

This thesis served to not only inform stakeholders about the Trail but also helped to identify the necessary aspects the decision makers have to consider in linking communities and industry. The challenges and opportunities resulting from cooperation among stakeholders, from the public and private sector are also identified (Fyall & Garrod, 2005; Palmer & Bejou, 1995). The result of this research clarifies the important role of stakeholders in developing an Aquaculture and Seafood Trail in the Top of the South. This thesis identifies the importance of expert knowledge in supporting the innovative development of peripheral coastal communities promoting tourism.

6.1 Conclusions

The historical review of aquaculture and tourism in the case study region reveals that there are a variety of local champions and complex structures that exist in driving the development of the two industries. The linkage of the two industries through the Trail is creating new relationships. Based on the review of existing structures in the area the research pointed out that although some supportive relationships are long-established there are opportunities to strengthen these relationships through proper management and collaboration.

Findings based on the qualitative and quantitative data, specifically related to the improvement of the Trail, provide evidence that there are currently limited linkages between tourism and the local seafood processors. The perceived weaknesses in networking, coordination, and marketing confirm that councils, tourism leader organisations (example, i-SITE, Destination Marlborough), ports' and aquaculture industry associations, are important centre points for development of cooperation.

Key stakeholders' perceptions about potential links between the tourism and aquaculture sector were positive overall. Results of the present study have

confirmed that there is potential for the Trail to become an important regional networking innovation.

Strategic promotion of locally caught seafood through value-added tourism products and opportunities is relatively new for the Top of the South region, a destination that is becoming increasingly recognised as a leader in wine and food tourism. Since most New Zealand seafood is exported, the idea of promoting locally caught seafood through 'value-added' tourism products and opportunities provides a unique and innovative marketing opportunity for the destination.

Research, science and technology are main drivers for New Zealand's sustained prosperity (Ministry of Economic Development, 2008). There are several organisations and institutes in the country that are contributing to innovative development by conducting cross-boundary research that encourages economic cooperation and willingness to share knowledge. However, the average level of investment in R&D in the OECD countries is higher than in New Zealand (Ministry of Economic Development, 2008; Ministry of Research Science and Technology, 2007b; Statistics New Zealand, 2008). Effective innovation performance depends upon integrating skills and knowledge, financial support, culture of innovation, regulation and policy, education, products and services (Government of Newfoundland and Labrador, 2005; Ministry of Research Science and Technology, 2007a).

The main reasons for the present low level of innovation in the Top of the South are the lack of management resources (e.g. supporting cross industry collaboration) and the necessary effort (e.g. time and costs) of developing and introducing innovations. The novelty of linking the seafood and tourism industries results in a low number of people available that are trained to provide these experiences and interpret aquaculture in a meaningful way. The government regulations (e.g. aquaculture policy) are also perceived as slowing down innovative activities (Statistics New Zealand, 2008). These are some of the challenges key stakeholders have to consider in promoting innovative and sustainable development in the Top of the South region.

In the context of the Trail, this case of innovation is particularly unique in that it was led by the seafood industry (not experienced in tourism yet) rather than being driven by the tourism or destination management organisation. The goal of the Trail was to illustrate the importance of marine farming as an advantage to the local tourism economy and as a means to change the local attitude towards the aquaculture industry. The initial development of the Trail relied on personal relationships between a leader in MFA and individual businesses (seafood producers and retailers, restaurants, tours, accommodation).

The Trail fosters the development of an integrated regional brand with one strong image that is built on the communities' existing character. The concept is helping to modify service and supply and the relationships between aquaculture and tourism businesses, planners, city councils and information providers. By linking the well established industries of aquaculture and tourism, the Trail demonstrates that new products are being created. All these are indicators of innovation, which has the potential to ensure the long-term success of which the Trail will be dependent on the support of locals (Aarsaether, 2005).

6.2 Recommendations

Connecting seafood and aquaculture products and tourism in the form of the Aquaculture and Seafood Trail holds potential benefits for each industry and other economic sectors as well as the local communities in the region. Recommendations verify the region's and stakeholder's capacity of combining the tourism and aquaculture industries based on a themed trail that links the peripheral communities and will be outlined based on the relation of emergent themes model presented in Chapter Five (Figure 5.1.).

Access

- The study showed that there is a need for more purchase options of local marine products for tourists and residents. The establishment of fish markets (or fish market stalls on existing local markets), additional fish shops throughout the region, or selling fresh fish at the dock would be opportunities to address this issue. Therefore existing restrictions have to be adjusted.

- More options for locals and tourists to inform themselves about the industry could be a means to increase knowledge and hence acceptance of the aquaculture industry. To achieve this recommendation, interaction with seafood-related attractions and activities such as exhibitions or the visitation of mussel farms would be supportive. However, tours have to be affordable for residents and tourists.
- To make increasing accessibility of locals and tourists to the aquaculture industry more attractive to the industry, health and safety regulations have to be reviewed as well as visitation to farms have to be integrated into new attractions and activities. Existing water taxis should offer more effective and comfortable transportation options.

Economic Development

- The study illustrated that there is potential for the aquaculture industry to become a tourist experience and further serve as a tool for national and international outreach. Increasing the reputation of the local marine products and increasing the number of visitors spending more time in the region can be sustainable economic drivers for the region in the Top of the South.
- Decision-makers in district councils and the Ministry of Fisheries should consider mussel farms as a means to add value to the seafood and tourism industries by developing the AMAs close to shore for tourists and preserving the large pristine view scapes.
- Simplification of permitting related to direct sales opportunities, harvesting of farmed species during tours, or local dock sales could become part of economic development efforts.

Destination Image

- The study showed that the existing marketing strategy of the region is predominantly not perceived as satisfying. The Trail could help to define an international recognised image for the Top of the South in addition to the existent wine reputation in the region. Tourists will take messages that they

gained during their holidays, back home and through word-of-mouth share this information. Thus, emphasises the importance of promoting the transparency of local products.

- Increasing public interest in the origin and preparation of local food was indicated as opportunity for attracting more people to the Top of the South through more focused marketing of the Trail. The concept of advertising the aquaculture industry and seafood-related businesses through the Trail compliments the region's original character and supports a clear destination image for the region.
- To send a clear message and to unify the region's variety of attractions implies a need for clear standards and consistent branding. A similar themed branding logo on all advertisement materials (e.g. brochure, website, and signage) should be considered.
- Further there seems to be the need for a branding image of the Trail that is attractive enough 1) for tourists to drive and participate in the Trail and 2) for operators to buy in and cooperate.

Concept

- To develop a sufficient trail-concept it is essential to understand the market competitiveness among tour operators and seafood companies. One solution may be done by instituting a point-system or a tiered fee-system for participants, through advertisement on the website or a sponsorship programme.
- On the one hand the Trail participants who put more effort into the concept should be rewarded, but on the other hand smaller businesses, without which the Trail would not be possible, should also have themselves represented. Thus certain membership-criteria are needed that treats participants fairly, creates consistent messages that are supported by all partners, and motivates organisations and businesses to invest time and money. This may become an obstacle given an existing underlying conflict

between some of the more preservation oriented environmental groups and tour operators and the aquaculture industry.

Outreach/Education

- The initial idea of the Trail as a means to inform locals more about the aquaculture industry proved true in the sense that there is a need for more information and education about the local industry for residents. According to the interviewed stakeholders, the link to tourism offers several opportunities for the operators involved in the aquaculture and seafood industry, in terms of improving and spreading their image on national and international level.
- The fact that access to information about the aquaculture industry is very low led to the suggestion of creating a comprehensive information centre offering interactive options to familiarise residents and visitors with the marine industry, its products. This centre could provide local expertise and information about the industries' regional economic, environmental outreach and cultural heritage with a maritime focus.
- The need for more available information on the Trail members, their products and their environmental impact was expressed and would provide one opportunity to address sustainability concerns. Social benefits are also accrued by having a public that is more educated about and more willing to accept marine farms as part of the tourist experience.

Marketing

- The brochure was recognised as a potentially worthwhile marketing tool that highlights the opportunities offered in the region. Stakeholders emphasised that more focused and regional destination planning information is needed to create awareness and provide a useful guide for potential customers. In addition the brochure's distribution concept has to be expanded. Involvement of more i-SITEs as central information hubs and more operators, such as accommodation, restaurants and vineyards that offer local seafood is necessary to advertise and provide interpretive materials that are

informative and understandable for everyone. The development of a website in conjunction with the brochure was also constantly mentioned.

- The Trail presents an opportunity for locals to become involved in promoting the region to friends and families and also get more in touch with the aquaculture industry themselves. That could be facilitated for example by mailing the brochures to residents, inviting locals on tours or to tasting events, or reducing the prices of Trail-activities for locals in the low season.
- Important for further development of the Trail is a clear definition of the target group. The choice of attractions offered by the Trail should be developed for local, national and international visitors, but even these segments of consumers may have different demands. Although the same attraction can be interesting for all three target groups, the level of information provided must be adjusted. One recommendation based on the research is to provide workshops for the tour operators and other Trail participants to improve the ability of tours to communicate a variety of messages based on key information from reports, former research and expert knowledge. That would also ensure the delivery of a consistent image and take-home message for the variety of visitors that have different interests and levels of knowledge.

Collaboration

- The involvement of a variety of operators and stakeholders from the different communities, each with different levels of knowledge, power, financial possibilities, technical equipment and interests suggests that there is a good working collaborative management system in place. Disconnected policies and separated promotion strategies of Trail participants have to be addressed so that there is agreement on and coordination of outreach, education and marketing information.
- The region's existing international marketing alliance and businesses, especially Māori operations and organisations, already operate across the industries and are a good basis for the positive development of the Seafood Trail. However, links between aquaculture related businesses and tourist

attractions are still in need of strengthening and the support of aquaculture managers, scientists and industry is necessary.

- The extension of the concept creates added costs, for example for additional brochures that need to be printed, as well as providing discounts or finding sponsorship to support display of brochures in tourist information centres. These costs could be distributed via cooperation.
- External advisory support and research can also help the region to benefit from its resources in a sustainable manner. The participation of the Auckland University of Technology and NZTRI in research and planning for the Trail is already helping to build local support and networks and to overcome past weaknesses in technical and financial support.
- Opportunities for local organisational representatives to learn about, and even visit similar regions (e.g. the Australian Seafood Trail) may be useful toward building collaboration and innovation adoption. A study examining best practices and reviewing successful and unsuccessful features of several different examples of seafood and tourism cases may also be instructive to these regional endeavours.

6.3 Limitations and Future Research

This case study concentrates on the Aquaculture and Seafood Trail in the Top of the South in New Zealand. Consequently, results and recommendations are specific and do apply mainly to this region. However, there is potential to do comparative research in similar coastal regions where both seafood and tourism are important to the local economy to find out similarities or differences.

The primary research in the area was conducted between 30th June and 10th July 2008, hence personal observations were limited to a relatively short period outside the active tourist season. It is recommended to determine further observations of impacts from the tourism and aquaculture industry on the case study region in the high season. Further, there are opportunities for the development of additional cases on innovation in this area of linking seafood and tourism as a means to inform coastal regions to demonstrate the effectiveness of collaboration.

The interview sample included the management organisations only due to time and financial limitations. Further research should be done with the support of universities to provide information from businesses' perspectives. Understanding the perception of businesses involved in the aquaculture or tourism industry is important to complete a full evaluation of the Trail concept. In this context an economic analysis of the Trail's impact on participating businesses and on the communities should be included.

Further research is needed to distinguish the demand for a seafood themed trail from domestic and international visitors' point of view. Additionally resident perceptions and attitudes have to be evaluated to get an overall picture of the need for and acceptance of a seafood themed trail to inform marketing and development strategies.

6.4 Summary

The existing Trail concept is perceived as a good start for future innovative and sustainable development in the region. Analysing the present stage of the Trail concept pointed out the necessity of gathering expert knowledge and understanding regional capacity, and organisational changes, as a result of the development of the Trail. The use of existing resources in a sustainable manner, partnership strengthening, and the consideration of resident's attitudes and visitor demand are necessary for the improvement of the Trail and the further enhancement of the regional image.

This case study and the stakeholder input highlight the fact that marketing of seafood and tourism products and outreach/education about sustainability of seafood overlap when it comes to economic development planning in coastal regions dependent on tourism and aquaculture. As such, tourism holds potential for seafood companies and marine farmers to market their products. The presence of marine farms and related seafood processing units also holds potential for tourism businesses to create new tourism products such as shown in the Top of the South region of New Zealand.

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GLOSSARY

Aquaculture	Farming/culture of marine or freshwater aquatic species such as fish, shellfish and even plants. Cultivation can range from land-based to open-based production (Ministry of Fisheries - Te Taitiaki i nga tini a Tangaroa & Aquaculture New Zealand, June 2008). In New Zealand, this farming takes place both in the sea and in land-based, man-made fresh and saltwater enclosures. New Zealand regulations require that any fish or aquatic life being farmed is kept separate from wild species, and that it is kept in the continuous possession or control of the farmer (Ministry of Fisheries, 2008b).
Fishery	<p>A fishery can be any marine species that is caught or harvested by people to sell, process, or eat. The term also covers all the other activities related to the harvest of that species of marine life, including:</p> <ul style="list-style-type: none">• research• cultural and scientific knowledge base surrounding the species• recreational and customary use of the resource• commercial activities surrounding the resource (harvesting, processing, exporting etc)• the system for managing sustainable use (Ministry of Fisheries, 2008c).
FishServe	Trading name of SeaFIC subsidiary - Commercial Fishery Services Ltd and provides a means to manage quota share, vessel registrations and permit holders (FishServe, n.d.).
FINNZ	was formed in 2003 to provide consulting services, software development and data processing for the seafood industry. It is owned by the Seafood Industry Council and, among its other roles, enables statutory registry services for the industry through FishServe.

- iwi extended kinship group, tribe, nation, people, race - often refers to a large group of people descended from a common ancestor.
The largest independent politico-economic unit, normally united through a common ancestor.
- Marine-based Aquaculture is defined by the Resource Management Act 1991 as “the breeding, hatching, cultivating, rearing, or ongrowing of fish, aquatic life, or seaweed for harvest if the breeding, hatching, cultivating, rearing, or ongrowing involves the occupation of a coastal marine area, and includes the taking of harvestable spat if the taking involves the occupation of a coastal marine area.”
- OECD countries: Australia, Belgium, Czech Republic, Finland, Germany, Hungary, Ireland, Japan, Luxembourg, Netherlands, Norway, Portugal, Spain, Switzerland, United Kingdom, Austria, Canada, Denmark, France, Greece, Iceland, Italy, Korea, Mexico, New Zealand, Poland, Slovak Republic, Sweden, Turkey, United States
- QMS The Quota Management System of New Zealand controls the fishing resources of New Zealand by limiting the amount of fish that can be caught by citizens and New Zealand owned companies.
- Qualmark Quality Assurance Programme of the NZ Automobile Association and Tourism NZ supported by the Tourism Industry Association.
- Seafood Tourism represents travel to a destination where seafood is harvested, farmed, processed, uniquely prepared and celebrated or where seafood is culturally or historically significant (Jodice & Norman, 2008).

Appendix 1 – Consent Form

Consent Form



Project title: **Exploring the role of innovation in promoting sustainable tourism development in peripheral communities**

Project Supervisor: **John S. Hull, Associate Director, NZTRI**

Researcher: **John S. Hull, Laura Jodice, Ulrike Sassenberg**

- ☐ I have read and understood the information provided about this research project in the Information Sheet dated 25 February 2008.
- ☐ I have had an opportunity to ask questions and to have them answered.
- ☐ I understand that notes will be taken during the interviews and that they will also be audio-taped and transcribed.
- ☐ I understand that I may withdraw myself or any information that I have provided for this project at any time prior to completion of data collection, without being disadvantaged in any way.
- ☐ If I withdraw, I understand that all relevant information including tapes and transcripts, or parts thereof, will be destroyed.
- ☐ I agree to take part in this research.
- ☐ I wish to opt out of the audio tape recording for the interview.
- ☐ I permit the researcher to take photographs of tourism facilities at my business to illustrate general points about the tourism industry in my region as part of this research.
- ☐ I wish to receive a copy of the report from the research (please tick one): Yes ☐ No ☐

Participant's signature:.....

Participant's name:.....

Participant's Contact Details (if appropriate):.....

Date:

**Approved by the Auckland University of Technology Ethics Committee on 9th
of April 2008.**

AUTEC Reference number 08/42.

Note: The Participant should retain a copy of this form.

Appendix 2 – Interview Guide for Key Stakeholder Participants:

- Please tell me about your personal background.
- Please tell me about the business you are working for and your position/about your business.
- Have you heard about the Top of the South Aquaculture and Seafood Trail?
- What are the strengths of the Top of the South Aquaculture and Seafood Trail?
- What are the weaknesses of the Top of the South Aquaculture and Seafood Trail?
- What opportunities has the Top of the South Aquaculture and Seafood Trail provided to the region?
- Are there any challenges in the region with the Seafood Trail?
- What are/might be the regional benefits of the Seafood Trail?

[possible PROMPT]

- Has/could the trail assisted/assist in providing new marketing opportunities for the region? Please describe.
- Have there been/could there be any new partnerships developed as a result of the Seafood Trail? If so with which type of organisations? What types of projects? (i.e., who else should be involved?)
- Does the Seafood Trail provide new product development and marketing opportunities? If so, please describe in more detail.
- Has/Could the Seafood Trail resulted in any financial support to the region directly or indirectly for marketing or product development? If so, please describe (i.e. new public or private support).
- Does/could the trail enhance the region's products and services for visitors? If so, can you elaborate?
- Have you noticed any changes in the region due to the implementation of the Seafood Trail?
 - Might the Seafood Trail require and new infrastructure or facilities in the region. If so, please describe. For what reason?
 - Have/could there been any new products and services developed in the region (guided tours, new menu items, new promotional materials) as a result of the Seafood Trail? If so, please describe.
 - Has/could the seafood trail improved/improve business performance in the region? If so, how?
 - Could the Seafood Trail provide any new ideas and innovative opportunities for the tourism and aquaculture industry in the region? If so, please describe. Are there any strategies you can suggest for making this happen?
- Are there any regulations and policies that impact or support this type of strategy (positive or negative way)? Please describe.
- Do you have any other comments that you would like to share?

Thank you for your participation in this interview. We appreciate your input and will be sure to provide you with a summary of the report once it is completed.

Appendix 3 – Regional Stakeholder Survey



Regional Stakeholder Survey

Information for Participants

As a local key stakeholder you are invited to participate in evaluating the relationship between aquaculture expansion and tourism interests in your region.

We'd like to know a bit about you, your opinions about tourism and aquaculture in your region and the importance of these businesses to local economic development.

The survey will take approximately 15 minutes to complete. This survey is an important phase of the whole project exploring the linkage between tourism and seafood in the Nelson/Marlborough region.

Participation is entirely voluntary and you will in no way be disadvantaged should you choose not to take part. The survey will run until 15th of August 2008. You may complete the survey at any point during this time.

All answers are confidential. By taking part in the survey you are giving consent to be part of this research.

Results of this research may be used in journal and conference publications. The results of this research will also be available on www.nztri.org in early 2009.

For further information about this research contact:

Project Supervisor: John Hull: email john.hull@aut.ac.nz , phone +64 9 921 9999 ext 6298

What do I do if I have concerns about this research?

Any concerns regarding the nature of this project should be notified in the first instance to the Director of NZTRI, Simon Milne: email simon.milne@aut.ac.nz , phone +64 9 921 9245

Concerns regarding the conduct of the research should be notified to the Executive Secretary, AUTEK, Madeline Banda, madeline.banda@aut.ac.nz , +64 9 921 9999 ext 8044

Approved by the AUT University Ethics Committee on TBD, AUTEK Reference number 08/42.

Regional Tourism Business and Stakeholder Survey

By completing this survey you are giving consent to participate in this research.

SECTION 1: BACKGROUND QUESTIONS

1. Gender?

☐ Male

☐ Female

2. In what year were you born?

3. What is your highest education level?

☐ Primary

☐ Secondary

☐ Vocational

☐ University

☐ Graduate Certificate

☐ Graduate Degree

4. How many years have you lived in your present community?

5. How many years have you been employed at your present job?

6. What sector do you represent in the tourism industry?

☐ Public

☐ Private

☐ Non-profit

7. What are three main responsibilities of your job?

8. What services do you provide to the tourism industry in your region?

(Check all that apply)

☐ Development Funding (e.g., loans or grants)

☐ Management of Tourism Association

☐ Recreation Management

☐ Infrastructure/Facilities Management

☐ Transportation

☐ Tourism Planning

☐ Coastal / Ocean Planning

☐ Training / Education

☐ Strategic Planning

☐ Marketing

☐ Policy Making

☐ Other – Please specify:

SECTION 2: PLEASE INDICATE YOUR LEVEL OF AGREEMENT WITH THE FOLLOWING STATEMENTS

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
General					
1. Tourism is important to my region and community	①	②	③	④	⑤
2. Tourism is well-developed in my region/community	①	②	③	④	⑤
3. Tourism has grown in my region in the last five years	①	②	③	④	⑤
Resident Attitudes					
4. Residents are supportive of the tourism industry	①	②	③	④	⑤
5. Resident attitudes towards tourists are positive	①	②	③	④	⑤
6. Residents are supportive of the aquaculture industry	①	②	③	④	⑤
7. Residents are supportive of the commercial fishing industry	①	②	③	④	⑤
Economics					
8. Local businesses are benefiting economically from tourism	①	②	③	④	⑤
9. The majority of businesses in my region are small and medium sized	①	②	③	④	⑤
10. There are many new attractions/activities for visitors in the last 5 years	①	②	③	④	⑤
11. Tourism is a locally controlled industry in my region	①	②	③	④	⑤
12. Our region is networking with other economic sectors to promote tourism	①	②	③	④	⑤
13. There are conflicts between tourism and other economic sectors	①	②	③	④	⑤
Environment					
14. The tourism industry in my region is environmentally sustainable or 'green'	①	②	③	④	⑤
15. Most tourism businesses are certified as part of quality assurance programmes	①	②	③	④	⑤
16. The majority of tourism businesses have an environmental policy	①	②	③	④	⑤
17. There are negative environmental impacts from tourism in my region	①	②	③	④	⑤
Seasonality					
18. Tourism is a seasonal industry in my region	①	②	③	④	⑤
19. Our destination is trying to expand tourism services in the less popular seasons	①	②	③	④	⑤

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
Customer Service					
20. The region offers quality customer service	①	②	③	④	⑤
21. The individuals employed in the hospitality (restaurant/hotel) sector are well-trained	①	②	③	④	⑤
22. There is a shortage of people to work in the tourism industry in our region	①	②	③	④	⑤
23. The business associations/development agencies are supportive of tourism	①	②	③	④	⑤
Marketing					
24. There is a clear marketing brand for our region	①	②	③	④	⑤
25. The marketing efforts for our region are well-coordinated	①	②	③	④	⑤
26. The website for our region is beneficial to my business	①	②	③	④	⑤
27. Our region is maximizing the use of technology in promoting tourism	①	②	③	④	⑤
Planning					
28. Our region has integrated cultural offerings (festivals/events/music/storytelling) into our tourism product.	①	②	③	④	⑤
29. Our region has a strategic plan for tourism	①	②	③	④	⑤
30. Over the past five years more tourism businesses are collaborating on product development and marketing efforts	①	②	③	④	⑤
31. There is a need for better coordination in the tourism industry in my region	①	②	③	④	⑤
32. Our region receives technical and financial support from universities and government agencies on tourism and industry trends	①	②	③	④	⑤
Access					
33. There is good access for visitors TO our region	①	②	③	④	⑤
34. There is good access (roads, airports, trains) for visitors in our region	①	②	③	④	⑤
35. Our region has a good public transport service for visitors	①	②	③	④	⑤

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
Product Development					
36. Marine-based resources are important to tourism in our region	①	②	③	④	⑤
37. Seafood is an important local product for visitors	①	②	③	④	⑤
38. Our region offers educational and experiential programmes for visitors	①	②	③	④	⑤
39. Our region has done a good job using local products/services for tourism	①	②	③	④	⑤
Local Participation					
40. I feel as though I have a say in how tourism is developing in my region	①	②	③	④	⑤

Please use the space below for any additional comments you may have:

Thank You for Participating in this Survey!

We appreciate the time you have taken to complete the survey and provide your valuable thoughts.

If you are willing, you may provide your contact information. This will allow the researcher to contact you if there are any follow-up questions regarding your responses. Your identity and contact information will be kept confidential under the supervision of the project investigator and will not be included in any research report.

Contact Name:

Email Address:

Appendix 4 – Survey Results

The indicators (G=general, R=resident attitudes, EC=economics, EN=environment, S=seasonality, C=customer service, M=marketing, P=planning, A=access, PD=product development, L= local participation) are related to the questions of the quantitative data as used in the data presentation.

Table: Perceptions of Tourism and Seafood in the Survey Region: Summary of Likert Scale Items

Item	N	Mean*	%				
			Strongly Agree	Agree	Neither agree or disagree	Disagree	Strongly Disagree
GENERAL							
G1 - Tourism is important to my region and community	19	1.11	89.5	10.5	0.0	0.0	0.0
G2 - Tourism is well-developed in my region/community	18	1.83	33.3	55.6	5.6	5.6	0.0
G3 - Tourism has grown in my region in the last five years	18	1.50	61.1	27.8	11.1	0.0	0.0
RESIDENT ATTITUDES							
R1 - Residents are supportive of the tourism industry	19	2.11	15.8	63.2	15.8	5.3	0.0
R2- Residents’ attitudes towards tourists are positive	19	2.05	15.8	63.2	21.1	0.0	0.0
R3 - Residents are supportive of the aquaculture industry	19	2.95	0.0	10.5	84.2	5.3	0.0
R4 - Residents are supportive of the commercial fishing industry	19	3.05	5.3	5.3	68.4	21.1	0.0
ECONOMICS							
EC1 - Local businesses are benefiting economically from tourism	19	1.47	63.2	31.6	0.0	5.3	0.0
EC2 - The majority of businesses in my region are small and medium sized	19	1.63	47.4	42.1	10.5	0.0	0.0
EC3 - There are many new attractions/activities for visitors in the last 5 years	19	2.58	5.3	42.1	42.1	10.5	0.0
EC4 - Tourism is a locally-controlled industry in my region	19	2.26	15.8	47.4	31.6	5.3	0.0
EC5 - Our region is networking with other economic sectors to promote tourism	18	2.33	22.2	33.3	33.3	11.1	0.0
EC6 - There are conflicts between tourism and other economic sectors	19	2.84	5.3	42.1	21.1	26.3	5.3
ENVIRONMENT							
EN1 - The tourism industry in my region is environmentally sustainable or 'green'	19	2.42	5.3	47.4	47.4	0.0	0.0
EN2 - Most tourism businesses are certified as part of quality assurance programmes	17	2.76	5.9	29.4	47.1	17.6	0.0
EN3 - The majority of tourism businesses have an environmental policy	17	2.88	0.0	29.4	52.9	17.6	0.0
EN4 - There are negative environmental impacts from tourism in my region	19	2.74	0.0	42.1	42.1	15.8	0.0
SEASONALITY							
S1 - Tourism is a seasonal industry in my region	19	1.74	47.4	36.8	10.5	5.3	0.0
S2 - Our destination is trying to expand tourism services in the less popular seasons	19	1.89	42.1	31.6	21.1	5.3	0.0
CUSTOMER SERVICE							
C1 - The region offers quality customer service	17	2.47	17.6	47.1	11.8	17.6	5.9
C2 - The individuals employed in the hospitality (restaurant/hotel) sector are well-trained	17	2.76	0.0	52.9	23.5	17.6	5.9
C3 - There is a shortage of people to work in the tourism industry in our region	17	2.29	17.6	52.9	17.6	5.9	5.9
C4 - The business associations/development agencies are supportive of tourism	17	1.94	23.5	58.8	17.6	0.0	0.0

Item	N	Mean*	%				
			Strongly Agree	Agree	Neither agree or disagree	Disagree	Strongly Disagree
MARKETING							
M1 - There is a clear marketing brand for our region	18	2.39	27.8	27.8	22.2	22.2	0.0
M2 - The marketing efforts for our region are well-coordinated	17	2.47	23.5	23.5	35.3	17.6	0.0
M3 - The website for our region is beneficial to my business	16	2.75	18.8	18.8	31.3	31.3	0.0
PLANNING							
P1 - Our region is maximising the use of technology in promoting tourism	16	2.69	12.5	25.0	43.8	18.8	0.0
P2 - Our region has integrated cultural offerings (festivals/events/music/storytelling) into our tourism product	18	2.11	22.2	50.0	22.2	5.6	0.0
P3 - Our region has a strategic plan for tourism	17	2.18	35.3	17.6	41.2	5.9	0.0
P4 - Over the past five years more tourism businesses are collaborating on product development and marketing efforts	18	2.28	22.2	33.3	38.9	5.6	0.0
P5 - There is a need for better coordination in the tourism industry in my region	16	2.50	6.3	50.0	37.5	0.0	6.3
P6 - Our region receives technical and financial support from universities on tourism and industry trends	16	3.00	0.0	25.0	56.3	12.5	6.3
ACCESS							
A1 - There is good access for visitors TO our region	19	2.00	21.1	63.2	10.5	5.3	0.0
A2 - There is good access (roads, airports, trains) for visitors in our region	19	2.26	5.3	68.4	21.1	5.3	0.0
A3 - Our region has a good public transport service for visitors	19	3.89	0.0	10.5	15.8	47.4	26.3
PRODUCT DEVELOPMENT							
PD1 - Marine-based resources are important to tourism in our region	18	1.72	38.9	50.0	11.1	0.0	0.0
PD2 - Seafood is an important local product for visitors to our region	19	1.95	31.6	47.4	15.8	5.3	0.0
PD3 - Our region offers educational and experiential programmes for visitors	17	2.76	5.9	23.5	64.7	0.0	5.9
PD4 - Our region has done a good job using local products and services for tourism	18	2.39	22.2	27.8	38.9	11.1	0.0
LOCAL PARTICIPATION							
L1 - I feel as though I have a say in how tourism is developing in my region	18	2.33	33.3	16.7	33.3	16.7	0.0

*Scale: 1=Strongly agree, 2=Agree, 3=Neither agree or disagree, 4=Disagree, 5=Strongly Disagree)

