UNDERSTANDING VISITOR ATTITUDES TOWARDS SEAFOOD AND TOURISM IN THE NELSON/MARLBOROUGH AND GOLDEN BAY REGION IN NEW ZEALAND TO FOSTER INNOVATIVE SUSTAINABLE FORMS OF TOURISM

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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."

Melanie Grudda

Ethics Approval

As this thesis used a survey that included human participants, ethical approval was required from AUT Ethics Committee (AUTEC).

Approval was received on 17 November 2008 with Ethics Application Number 08/271.

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ACRONYMS

ATLAS	Association for Tourism and Leisure Education
AUS	Australian
AUT	Auckland University of Technology
AUTEC	AUT Ethics Committee
CCO	Council Controlled Organisation
CEO	Chief Executive of Office
CRC	Cooperative Research Centres
DOC	Department of Conservation
DTS	Domestic Travel Survey
FAO	Food and Agriculture Organization of the United Nations
GDP	Gross Domestic Product
GIF	Growth and Innovation Framework
i-SITE	The NZ Visitor Information Centre
IVS	International Visitor Survey
MAF	Ministry of Agriculture and Forestry
MFA	Marine Farming Association
NIWA	National Institute of Water & Atmospheric Research
NP	National Park
NTT	Nelson Tasman Tourism
NZ	New Zealand
NZTRI	New Zealand Tourism Research Institute
QC	Queen Charlotte
RTO	Regional Tourism Organisation
RVM	Regional Visitor Monitor
SIT	Special Interest Tourism
SME	Small and Medium Enterprises
SPSS	Statistical Package for the Social Sciences
SWOT	Strengths, Weaknesses, Opportunities, and Threats
TEP	Tourism Eyre Peninsula

TIANZ	Tourism Industry Association New Zealand
TLA	Territorial Local Authorities
TSAST	Top of the South Aquaculture and Seafood Trail
UNWTO	United Nations World Tourism Organization
VFR	Visit Friends and Relatives
WTTC	World Travel and Tourism Council
Wwoofing	Willing workers of organic farms

ABSTRACT

With the exponential increase in global travel over the last six decades, tourists have become more interested in individually customised products to satisfy their travel demands. For rural destinations, globalisation has resulted in an increasing number of visitors looking for new, authentic, cultural experiences linked to culture. This growing interest in cultural tourism by international and domestic travellers includes a new niche market linked to food and culinary tourism. In order to maintain economic sustainability and competitiveness, rural regions must respond to visitors' specific travel needs by adopting innovative forms of tourism. The Top of the South Aquaculture and Seafood Trail in the Nelson/Marlborough and Golden Bay region represents an innovative approach to tourism by partnering the seafood and tourism sectors and by introducing new products such as seafood and aquaculture tours to the tourism market.

To successfully develop the seafood themed trail in the Top of the South and to balance demand and supply, it is vital to understand visitors' attitudes towards seafood and their level of interest in seafood related activities.

Based on a visitor survey and case study approach in the Nelson/Marlborough and Golden Bay region in New Zealand's South Island, this research explores attitudes and expectations of international and domestic visitors at the case study site towards seafood and tourism. In order to determine visitors' attitudes and support for linking the tourism and aquaculture sectors, the creation of a visitor profile assisted in understanding visitors' interest in seafood.

The results show that the majority of visitors like to eat seafood and have an interest in tasting fresh, locally harvested seafood in situ. The seafood themed trail has great potential to add value to the individual tourist experience and to support an innovative and sustainable approach to rural tourism planning, which is needed to maintain growth in primary industries such as aquaculture and tourism.

1 INTRODUCTION

With the exponential increase in global travel over the last six decades, tourists have become more interested in customised products to satisfy their travel demands (Mitchell & Hall, 2005). The growth in travel and tourism is a result of tourists taking more vacations having more free time and greater disposable income in the workplace (Dwyer, 2010). Technological innovation in transportation has also increased the efficiency and accessibility of destinations (Sharpley, 2008). Due to advanced engineering and cost reduction in the aviation industry, air travel has grown by an average of 9% annually since 1950 (May & Hill, 2004). Gössling and Peeters (2007) estimate that global growth rates in air travel are predicted to increase by 5% annually until 2020. Additionally, urbanisation and a hectic lifestyle have an impact on travel motivation and a growing demand for recreational activities, which is resulting in increased travel for pleasure (Sharpley, 2008). More and more travellers are seeking individualised and more intimate travel adventures as opposed to a mass tourism experience (Macleod, 2003a). The importance of experiencing a country's culture has become increasingly valuable to visitors and their interest in authentic cultural experiences (Brown & Hall, 2000; Hall & Boyd, 2005).

For rural destinations, an increasing number of visitors are looking for personalised tourism products and new experiences (Mitchell & Hall, 2005). The growing trend away from package holidays is opening up new visitor opportunities that incorporate authentic and sustainable alternatives (European Commission, 2002). One major aspect of travellers' cultural experience is tasting local food (Bessière, 1998; Refalo, 2000). The growing interest in food by international and domestic travellers is part of a niche market linked to food and culinary tourism (du Rand, Heath, & Alberts, 2003). The International Culinary Tourism Association (2009) reports that culinary tourism is much like ecotourism 20 years ago – one of the fastest growing market segments. Food tourism or culinary tourism is accepted as fostering sustainability in tourism (Handszuh, 2000). It is defined as "visitation to primary and secondary food producers, food festivals, restaurants, specific locations for which food tasting and or experiencing the attributes of a specialist food production region are a primary motivating factor for travel" (Hall, Sharples, Mitchell, Macionis, & Cambourne, 2003, p. 10). In order to customise visitors' expectations and travel motivations that support an interest in food, it is vital to understand what visitors are looking for in particular holidays and destinations. This knowledge can also assist in advancing tourism planning and sustainable development (Pearce, 2005; Richards & Wilson, 2006).

If tourism development is well planned and properly managed, benefits such as the creation of local jobs and an increase in income for the community have the potential to improve the living standard of residents. Another positive effect of tourism is that it can stimulate existing industries like agriculture and fisheries (UNWTO, 1998). To ensure a sustainable approach to tourism development, comprehensive community involvement is essential along with defined strategies that preserve community identity, resources and local control (Mair, Reid, & George, 2005).

Food is acknowledged as an essential element of the tourist experience. It is a significant component of travellers' expenditure, it expresses local identity and culture, and it is a marketable element of tourism (Hall et al., 2003).

1.1 RESEARCH BACKGROUND

Globalisation has significantly affected rural areas in developed countries since the early 1970s. Consecutive waves of economic reforms have prompted rural areas to diversify their economies with new primary products such as aquaculture and tourism (Hall, 2005). Food tourism strategies have the potential to combine these two sectors and therefore form an important/significant tool for regional development in countries like New Zealand (Hall, 2002; Hall, Sharples, & Mitchell, 2003; Telfer, 2001a, 2001b).

George, Mair & Reid (2009) have identified that rural areas have traditionally been coupled with primary resource industries such as fisheries and agriculture. Rural tourism is often seen as a resource for generating additional income and worldwide it is recognised for sustaining primary and related industries (Gorman, 2005). In order to sustain growth in primary industries it is important to address the adoption of innovation, quality, uniqueness and progressional training that pave the way for quality, service oriented rural tourism (Teagasc Agriculture and Food Development Authority, 2008-2010). Rural economic development strategies that focus on promoting innovations through food and wine tourism require local community support to incorporate a sustainable approach (Hall, 2005).

Tourism is a major contributor to the economy of New Zealand (The Tourism Industry Association, Ministry of Tourism, & Tourism New Zealand, 2007). It contributes just over 9% to the New Zealand gross domestic product (GDP) and employs one in 10 New Zealand citizens either indirectly and directly with a total of 184,800 full time equivalent jobs. Tourism contributes, on average, $59 million every day and its total expenditure to year end March 2009 peaked at $21.7 billion with $9.3 billion (16.4%) coming from foreign exchange earnings (Tourism Industry Association New Zealand, 2010).

Aquaculture, which includes the farming of marine organisms such as fish, mussels and crustaceans (FAO, 2003), is forecast to become one of New Zealand's leading industries. As the seafood industry's fastest developing segment, aquaculture utilises only 0.02% of New Zealand's entire coastline (Aquaculture New Zealand, 2009). The industry generates about NZ$320 million per year with national consumption totalling 40% of all sales. A primary goal for the New Zealand aquaculture industry is to produce NZ$1 billion of product value by 2020 (Burrell, Meehan, & Munro, 2006). As the world's most rapidly expanding primary industry, it is anticipated that aquaculture will equal the wild fisheries catch by 2030 (FAO, 2007).

1.2 RESEARCH AIMS AND OBJECTIVES

The main aim of this research is to determine visitor attitudes and support for linking the tourism and aquaculture sectors in the Nelson/Marlborough and Golden Bay region in New Zealand through a seafood trail. In this research the term 'visitor' is used in a broader sense, embracing "international tourists, domestic tourists, and tourist-facility users from the local region or home town" (Pearce, 2005, p. 5).

Accordingly, the main aim results in the following research question:

What are visitors' attitudes towards seafood, marine farming, and aquaculture and is there sufficient interest and support for linking the tourism and aquaculture sectors in the Nelson/Marlborough and Golden Bay region through sustainable forms of tourism such as a seafood trail?

In order to fulfil this research aim and to answer the research question, a case study approach assists in understanding visitors' attitudes towards seafood, marine farming and aquaculture to determine the level of interest for a seafood trail as an innovative and sustainable tourism development strategy that will provide competitive advantage for the region. With the purpose of providing a viable and reliable research outcome, the following research objectives are addressed:

- Provide a context for understanding the importance of seafood and culinary tourism in the region.
- Profile visitors at the case study site to understand their interest in and knowledge of seafood.
- Investigate and assess visitors' attitudes and expectations towards the seafood experience to justify an aquaculture and seafood trail based on visitors' levels of interest.
- Evaluate traits and benefits of a themed trail and determine ways it can support an innovative and sustainable approach to rural tourism planning.

This research provides a visitor's perspective in order to better understand the potential benefits and challenges of linking the seafood and tourism industries through the development of an aquaculture and seafood trail. It also serves to support strategic tourism planning and management decisions in the Nelson/Marlborough and Golden Bay region. Additionally, it provides a case study example for similar coastal destinations adopting seafood tourism as a development strategy.

With the Marine Farming Association (MFA) being interested in integrating the tourism and seafood industries, it is important to share visitor demand data between community planners and policy makers to advance innovative development of coastal areas (Brookfield, Gray, & Hatchard, 2005).

1.3 CONTENT OF STUDY

Following this introduction, Chapter Two provides a comprehensive inventory of study-related concepts and theory that address destination development in the context of rural areas. It is shown that global tourism development trends are creating the need for customised travel experiences and sustainable tourism planning. Theoretical models aim at explaining visitors' behaviours and travel motivation to build a bridge between tourists' expectations and the adoption of innovative forms of tourism such as combining the tourism and seafood industries. In this respect the role of special interest and niche tourism is explored.

Chapter Three explains the methodology of the study. The research design encompasses secondary and primary data collection integrating a case study from the South Island of New Zealand. This section explains the data collection instrument and describes the content of the visitor survey, which explores visitors' knowledge and attitudes about seafood. The chapter also gives details of the sample selection and methods used for data analysis. It closes with a discussion of the limitations as well as validity and reliability of the study.

The 'Nelson/Marlborough and Golden Bay' case study site is profiled in Chapter Four and includes an inventory of the region's dominant tourism assets and attractions as well as an overview of the historical, political, socio-cultural and economic conditions. Another important part of the outline of the case study site is the summary of the actual 'MFA Aquaculture and Seafood Trail' case study and a review of the linkages between the tourism and seafood industries. The last segment of this chapter provides demographic and psychographic information about the current visitor to the Top of the South region.

The primary research findings of the survey are presented in the fifth chapter. This involves the building of a visitor profile, including an outline of demographic and psychographic data in order to better understand attitudes, expectations and motivations of visitors to the Nelson/Marlborough and Golden Bay region.
In Chapter Six, the research results are linked with the theory in the literature review and are discussed in the context of the case study. The main emphases are on demonstrating the importance of seafood and culinary tourism, profiling visitors to the region in terms of their interest in seafood, assessing visitors' attitudes and expectations towards a seafood experience, and an evaluation of the benefits of a themed trail.

The final chapter, Chapter Seven, summarises key findings of the research and evaluates the study outcomes in the context of the original research aim and objectives. Furthermore, recommendations for sustainable tourism development and future research are provided.

2 LITERATURE REVIEW

In order to understand the challenges and opportunities of tourism development in rural regions, a comprehensive overview of tourism concepts addressing destination development and market demand is required. This chapter presents a review of secondary literature from books, regional reports regarding tourism, seafood, and aquaculture, government documents, journal articles as well as web-based information. It provides a context for the discussion of research findings regarding visitor attitudes towards the Top of the South Aquaculture and Seafood Trail (TSAST) in the South Island of New Zealand.

This literature review outlines global tourism trends to help understand how tourism is developing today on a global scale. Second, the concept of sustainability, a vital part of successful tourism and destination planning, especially in rural communities, is addressed. Economic and social benefits from tourism for a community or rural region can only be maximised if a baseline of information is identified for decision-making and if a sustainable concept/strategy is applied. As a result, a summary of the main indicators of sustainable tourism is presented.

The third part of this chapter considers special interest tourism (SIT) as one of the fastest growing sectors of sustainable tourism. This form of tourism offers the opportunity to combine regional assets such as coastal and/or marine environments and culinary tourism, two important elements of the tourism industry linked to the TSAST.

The fourth section explains that it is also crucial to comprehend what opportunities and challenges rural areas face in regards to tourism planning and development. Community involvement plays an important role in peripheral and rural areas when it comes to adopting innovative practices.

Fifth, in peripheral areas, innovation is often seen as a remedy or last resort to reinvent and rejuvenate a region when the economy is slowing down. Within the framework of combining the tourism and seafood industries, it is necessary to examine the role of themed trails as innovative forms of tourism and their potential to boost the economy. Therefore an inventory of aquaculture and seafood trails worldwide is presented, providing valuable background information and a context for comparison.

Finally, innovation in tourism is also based on market knowledge. To learn about the potential markets for the TSAST, it is necessary to understand what motivates travellers to go to the Nelson/Marlborough and Golden Bay region and what are visitors' attitudes towards seafood and tourism in the largest seafood producing area in New Zealand.

2.1 Global Tourism

Travel and tourism are amongst the world's major and fastest growing industries (Hall & Coles, 2008; Sharpley, 2006). Due to the worldwide economic crisis, travel and tourism activity around the world decreased in 2009 (WTTC, 2010). The United Nations World Tourism Organisation (UNWTO) (2010) reports an estimated worldwide decline of 4% from 920 million in 2008 to 880 million international tourist arrivals in 2009. Despite the decline, the tourism economic data for 2009 demonstrates employment in the tourism sector of more than 235 million people and a share of 9.4% of the global GDP (WTTC, 2010). In early 2010, tourism statistics indicate an increase in international tourist arrivals and a generally recovering global economy. The UNWTO (2010) forecasts international tourist arrivals will grow between 3% and 4% in 2010 and are estimated to reach 1.9 billion by 2030 (Yeoman, 2008). In the long term, travel and tourism is predicted to grow by 4.5% annually. These forecasts confirm the increasing importance of the tourism industry as a major provider of employment and contributor to the global economy (WTTC, 2010).

Globalisation has opened up new travel opportunities. Exponential increases have been driven by transportation improvements, enhanced safety precautions, additional and better tourism facilities, as well as the increasing wealth and free time of people in developed countries (Buckley, 1999). The movement away from rigid travel packages has been meeting the needs of the independent traveller who is seeking adventure and exploration (Buckley, 1999). Within the luxury of choice, tourists now hunt for value for money. Influenced by health and safety concerns, change in demographics, technology, individualism and experiences, their desire to fully absorb the ethnicity and authenticity of the destination is expressed through their increasing interest in culture, food, and sports events (Yeoman, 2008).

2.1.1 Top Tourism Trends

Since tourism is integrated with other economic sectors, specific key drivers of global change are also influencing tourism trends (Dwyer, Edwards, Mistilis, Roman, & Scott, 2009). According to Dwyer et al. (2009) changes in consumer values, political power and influence, environmental changes, as well as the rapid development of communication and information technologies will all contribute to major shifts in recreation and tourism over the coming 15 years.

Dwyer et al. (2009) identify six megatrends that include economic, political, environmental, technological, demographic, and social factors that are linked in a long term context with tourism policies, planning and development. Drivers of the six different segments influence destination and enterprise management on one side and tourists' values and needs on the other. These interacting aspects have a significant impact on new product development and the application of innovation in tourism (see Figure 2.1.1.1).

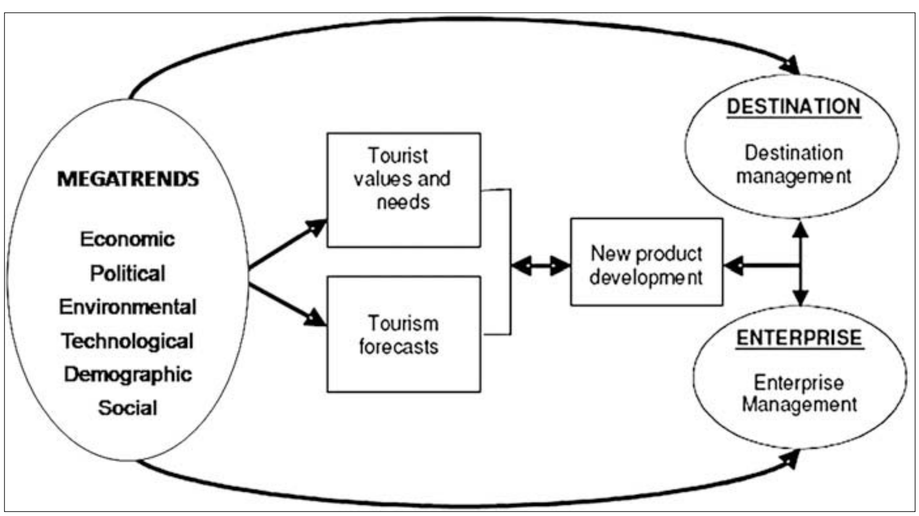

Figure 2.1.1.1: Influences of megatrends on tourism
Source: Dwyer et al. (2009)

Edgell, Allan, Smith, & Swanson (2008) argue further that changes resulting from tourism trends drive competitiveness and represent new challenges of strategic sustainable planning for communities as well as the necessity of an introduction of new tourism products.

As indicated by the UNWTO (2004a), tourism provides positive economic impacts and opportunities for modernisation but can result in negative consequences such as overcrowding, disturbance of traditional lifestyles, destruction of cultural and natural heritage (Briassoulis, 2002) and a lack of economic returns for locals (Kiss, 2004). Being amongst the most dynamic economic sectors, travel and tourism is acknowledged as one of the key instruments for driving the local economy; and is considered a major tool for sustainable development (UNWTO, 2007).

2.2 Sustainability in Tourism

Although there is growing awareness about the negative impacts of tourism, the sector is still being supported due to its significant economic benefits. As an instrument to minimize negative impacts, sustainability has become a priority for tourism policy and planning (Simpson, 2001). Since the late 1980s sustainability has been defined 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. 43). Regional economic development and the conservation of the specific destination's natural and cultural heritage have to be balanced to build an efficient, sustainable tourism industry (Hinch & Higham, 2004). Of the utmost importance is to supervise and guide tourism development in a sensitive manner respecting the social, environmental, cultural and economic background of the host community, today and into the future (Dredge et al., 2006).

According to Ekins (2000) sustainable development is based on three pillars: the social pillar which relates to human customs and ethical values as well as institutions and relationships; the economic pillar which focuses on the provision and distribution of limited resources; and the ecological pillar which combines the contributions of the social and the economic dimensions in the context of their environmental effects (Figure 2.2.1).

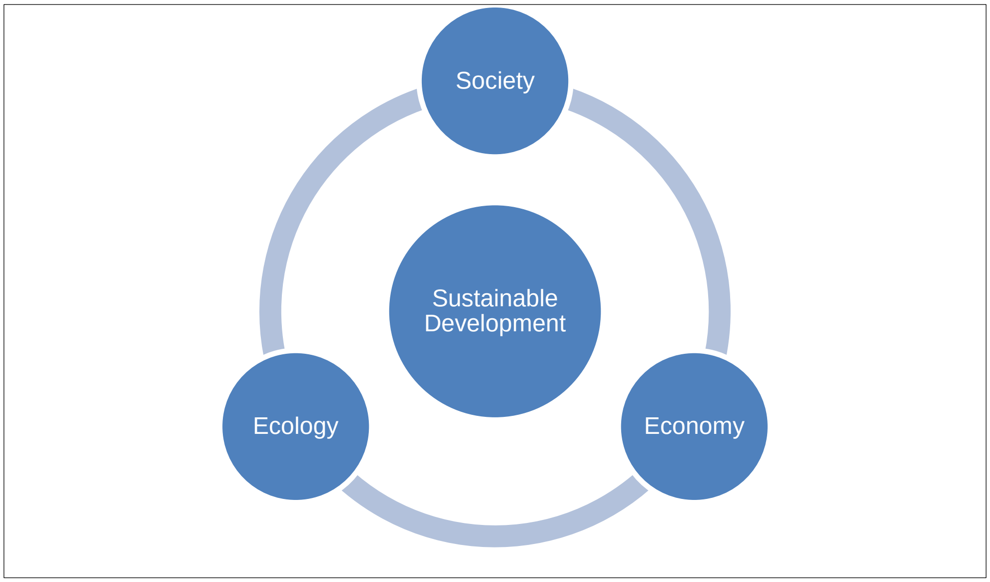

Figure 2.2.1: Sustainable development: Linking economy, ecology and society
Source: Baker (2006)

Tourism influences, and is influenced, by all pillars and is identified as one of the five key sectors that have been targeted by policymakers to integrate environmental concerns with sustainable development (Commission of the European Communities, 1992).

To ensure sustainable development, it is necessary to utilise natural resources with caution and to encourage participation, safety and creativity to foster the well-being of the community. Businesses, industries and organisations involved in planning have to be environmentally safe, socially accountable and willing to invest in the local community (Rogers & Collins, 2001). The tourist has to contribute to a sustainable tourism environment as well but little is known about their readiness and cooperativeness. In order to learn more about the environmentally conscious traveller, their demand for e.g. eco travel has to be analysed and a range of meaningful indicators such as demographics, attitudes and personality traits, have to be surveyed. The typical eco-tourist for example distinguishes him-/herself from the average mass tourist through a higher level of education and income as well as an older age group. Although a tourist profile can be created from this knowledge, it does not clarify if this kind of tourist deliberately minimises the negative impacts of their travel (Milne, 1998).

In an attempt to determine the major elements of sustainability, Bramwell (1996) identifies seven aspects of sustainability which take into account economic, social, cultural and environmental as well as political, managerial and governmental circumstances. Tourism impacts all these areas, necessitating the need for strategic tourism planning that involves community and stakeholder consultation. This is why tourism management has to be adopted by local government through a holistic approach that combines all planning processes (e.g. recreation and leisure planning, land use planning and environmental protection) (Dredge et al., 2006).

Having understood that tourism acts within a multifaceted socio-cultural, political, economic and environmental structure, it is obvious that changes in one aspect of the system affect all other sections as well. If economic circumstances vary this will unavoidable influence, for example, the business community’s approach to product development. Tourism has to be considered as an integral part of a broader construct and must not be considered separately (Dredge et al., 2006).

Cooperation and partnerships between stakeholders in the community are at the core of promoting the sustainability of tourism (De Lacy, Battig, Moore, & Noakes, 2002). Aspects of management, training and education, product development and marketing require stakeholder collaboration to effectively support the sustainability of tourism (Selin, 1999). Most important, partnerships need to embrace a holistic approach to planning and development rooted in sustainable principles applied at the national, provincial and local levels (UNWTO, 2001).

2.2.1 INDICATORS OF SUSTAINABILITY

In order to measure whether the outcome of applied methods is sustainable, specific indicators need to be adopted and monitored (Bell & Morse, 2008). According to the UNWTO (2004a) three quarters of all tourists worldwide visit coastal zones to pursue beach activities such as swimming and sunbathing, wildlife watching, fishing and boating, touring as well as enjoying the moderate weather. Coastal natural environments and rural surroundings often form the foundation of many walking routes and trails (UNWTO, 2004a). Suggested indicators that can support monitoring sustainable coastal development as well as trails and routes are presented in Table 2.2.1.1.

Coastal Area Challenge	Coastal Area Indicator
Environmental Damage	• Percentage of degraded coastal area • Expenses for repair annually
Water Pollution	• Days per year the coastal area is closed owing to contamination • Number of contamination incidents • Tourists' complaints
Crowding	• Tourist numbers
Perception of Cleanliness	• Percentage of visitors thinking the area is contaminated
Prosperity/Thriving of Key Species	• Regular species count • Number of harassment incidents • Abundance or scarcity of fish
Trails and Routes Challenges	**Trails and Routes Indicators**
Socio-Cultural Aspects: Benefits for Communities Involved in Trail and Employment Opportunities	• Residents' satisfaction level • Number of locals who trust they profit from trail • Amount of training courses offered and attendance
Economic Benefits	• Number of trail related jobs • Number of involved businesses • Tourists' expenses • Number of work-related partnerships • Percentage of locally supplied labour and material

Table 2.2.1.1: Coastal and trail sustainability indicators
Source: UNWTO (2004a)

How tourism is managed affects host communities and destination conditions. These indicators measure current conditions, serve as a prevention tool if negative impacts result, and assist in evaluating the sustainability of activities (UNWTO, 2004a). A fundamental issue linked to these indicators is the carrying capacity of visitors. The issue of volume is a major concern for sustainable tourism development (Wheeler, 1997). Mass tourism has been identified as often resulting in harmful socio-cultural and economic impacts that do not support sustainable tourism strategies (Milne, 1998).

2.3 SPECIAL INTEREST AND NICHE TOURISM

SIT can be a form of responsible tourism that addresses sustainability issues by limiting the impacts of mass tourism. Compared to mass tourism, SIT is sensitive to economic and social development and respects host communities (Douglas, Douglas, & Derrett, 2001). SIT often creates a competitive advantage for a community by focussing on sustainable development and by targeting niche markets. The nature of niche tourism is the differentiation of tourists through individual activities and the representation of diversity in travel preferences (Macleod, 2003b).

With a global trend towards alternative forms of tourism comes the challenge of managing the increasing impacts of "new tourists" who seek to experience the culture and lifestyle of the host community (Douglas et al., 2001).

Niche tourism, however, tends to reveal new means and opportunities for sustainable tourism development in destinations that seek to maximise community benefits by being appealing to high-spending tourists. In defining the niche market, focus is on identifying a few individuals by their interests who are strongly attracted by the products offered. The niche market needs to be large enough to generate profitable business but small enough to be of minor importance to competitors (Robinson & Novelli, 2005).

Niche tourism itself is broken down by Robinson & Novelli (2005) into different 'macro niches' market sectors (Figure 2.3.1) such as cultural, environmental, rural, urban, and other kinds of tourism. Each of those is further fragmented into 'micro niches' or SIT, e.g. geotourism, gastronomy tourism or sport tourism. Niches can also be created by geographical dimensions i.e. specialised locations such as wine or aquaculture regions that are pre-disposed to being niche destinations (Robinson & Novelli, 2005).

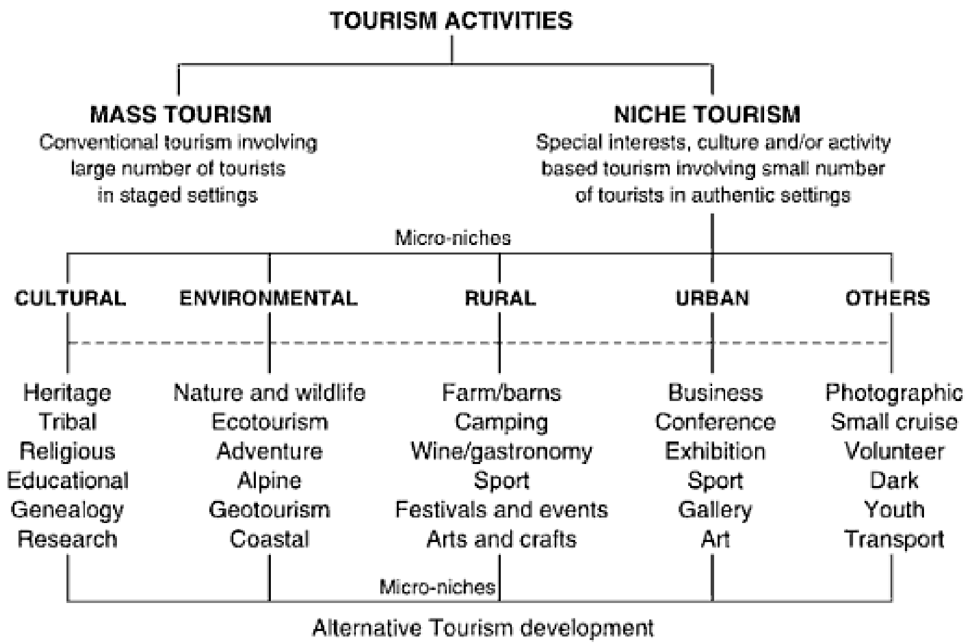

Figure 2.3.1: Niche tourism components – an introduction
Source: Robinson & Novelli (2005)

According to Robinson and Novelli (2005) there are three general approaches to niche tourism:

1. Geographical and demographic approach: the main benefit is the location's relevance to specific tourist activities (alpine, coastal, rural).
2. Product related approach: particular tourists' needs shape the niche tourism destination. The focus is on activities, attractions and food.
3. Consumer related approach: what is the consumer looking for to have their holiday expectations met? Tourist desires and requirements are the priority for the relation between demand and supply.

Connecting food and tourism is acknowledged in contemporary life and this combination can create an important niche market (Van Westering, Poria, & Liapis, 2000).
Changes in consumer demand towards niche products that provide authentic cultural experiences are a major current trend in tourism development. This form of tourism is generally small-scale, supplying better benefits to the community in the long term than mass tourism (De Haas, 2002).

2.3.1 RURAL TOURISM

Culture is an important aspect of tourism but has been largely influenced by globalisation and advanced technologies. The distinct lifestyle and exclusively unique culture of rural areas are more and more targeted by travellers in search of new tourism destinations and markets (George et al., 2009). In contrast to urban tourism, peripheral destinations lure tourists with untouched nature, authenticity and nostalgia and offer unique experiences for travellers (Caalders, 2000).

The recent classification of urban/rural profiles (Figure 2.3.1.1) defines minor and secondary urban regions alongside rural areas. Rural areas are separately classified by the differing influence of adjacent urban areas, which better reflects heterogeneity in the respective area (Statistics New Zealand, 2010c).

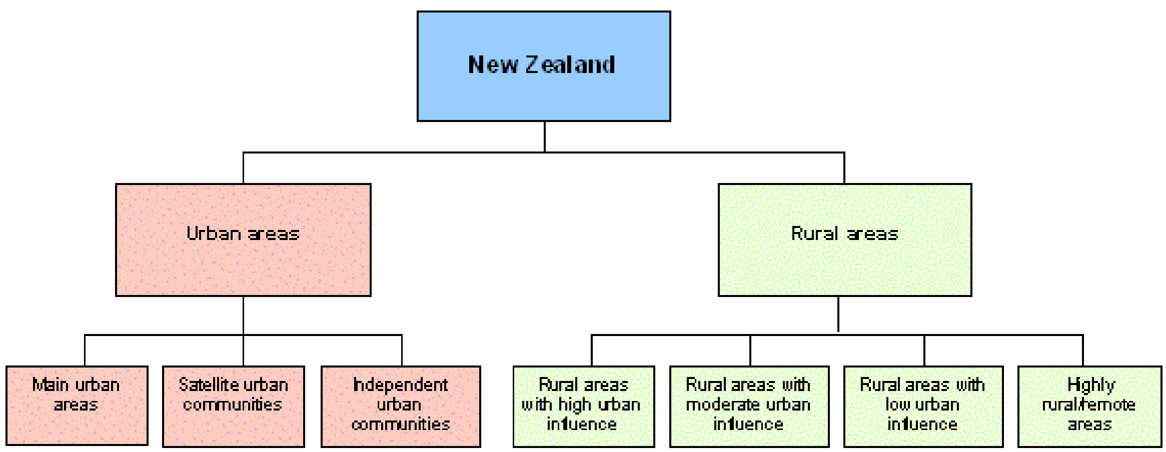

Figure 2.3.1.1: Urban/rural profile classification
Source: Statistics New Zealand (2010e)

The rural tourism concept is not limited to its geographical aspects but based on rural appeal, products, services and tourism enterprises (Figure 2.3.1.2). It includes special interest and outdoor adventure activities as well as less specialised pursuits of visitors such as relaxation (Lane, 1994; Sinha, 2005).

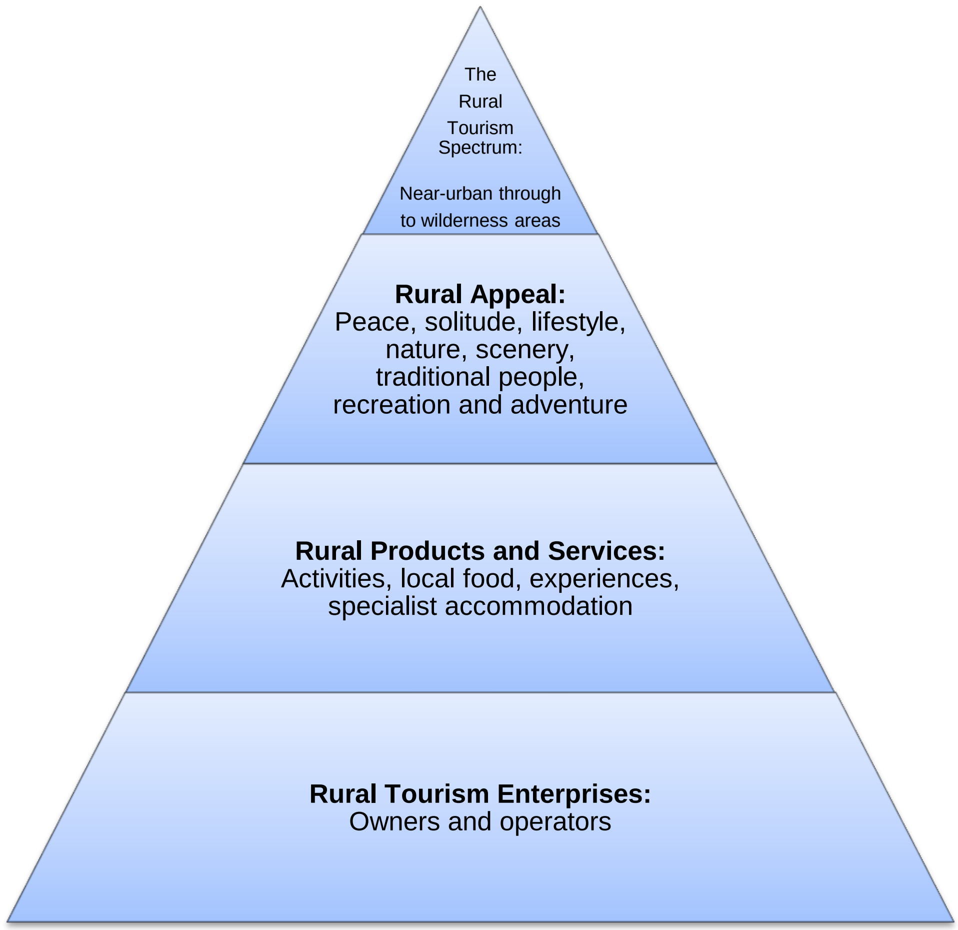

Figure 2.3.1.2: Conceptualisation of rural tourism
Source: Based on Page & Getz (1997)

With the increasing pressure of growing numbers of travellers on rural areas, policymakers need to address four key dimensions to achieve standards that are sustainable (Hall & Mitchell, 2005):

- Competition: the call for being conscious of and responsive to altering markets and the flexibility to apply measures that improve competitiveness
- Marketing: mostly underdeveloped marketing efforts, access to information about competition, demand and market structure, segment networks, industry developments and promotion strategies
- Cooperation and networking: community involvement and local cooperation are fundamental to rural tourism businesses
- Globalisation: significant influencing factor of market demand and development, requires continuous awareness due to possible positive and negative impacts

Due to the fact that tourism branding is often represented at the local, regional and national levels, rural destinations often adopt a mixture of characterless brands. A true and powerful brand is driven by an emotional connection for the potential visitor and consists of "identifiable propositions, values, and images acknowledged by the market" (Clarke, 2005, p. 93). Rural brands need to be based on product differentiation and should emphasise local identity and character of place in a way significant to the market. To every visitor the perceived brand must have an emotional epicentre to attract potential visitors (Clarke, 2005).

If rural tourism is aiming to provide a competitive advantage, businesses need to focus on overcoming challenges such as competition by creating business linkages and adopting innovations (Mitchell & Hall, 2005). Rural areas have customised their agricultural foundations through innovation and diversification by acknowledging the rising awareness of the cultural importance of food in contemporary life (Hall, 2005).

2.3.2 FOOD TOURISM / CULINARY TOURISM

Food tourism is a form of special interest tourism that is recognised as an important strategy for rural development (Hall & Sharples, 2003). Around one-third of all visitors' expenses are spent on local food and beverages supporting local economies and reducing economic leakages (Mason & Milne, 2006).

Food tourism or gastronomic tourism is defined by Hall and Mitchell (2001, p. 10) as "visitation to primary and secondary food producers, food festivals, restaurants and specific locations for which food tasting and/or experiencing the attributes of specialist food production regions, are the primary motivating factors for travel." Tasting local food can be both entertainment and a cultural activity therefore it is considered as an important part of the tourism experience. Tasting local food means experiencing a new culture and lifestyle and introducing visitors to traditions and new flavours that are unique to the destination (Kim, Eves, & Scarles, 2009). Chesser (2000, p. 232) stresses this by confirming that

> *to understand a culture, an individual must experience its food. Tourists visiting a region experience the culture through the goods they consume, as well as though the people and attractions. The food of a region is often a primary attraction.*

Murphy, Pritchard, & Smith (2000) argue that the destination has to offer specific products wanted and needed by the visitor as these are what the visitor consumes while on holiday. Local food is an attribute that is likely to add value to a tourism destination (Handszuh, 2000; Telfer & Wall, 1996). Furthermore it may foster a destination's sustainability and competitiveness (Crouch & Ritchie, 1999). Handszuh (2000) expands on this statement and identifies the following benefits from local food that often enhance sustainability while satisfying consumers needs:

- Contribution to authenticity
- Strengthening of local economy
- Provision of eco-friendly infrastructure and accordingly
- Improvement of handling local and imported food resources

Figure 2.3.2.1 explains that making use of local food is likely to directly or indirectly add to a destination's sustainability in various ways.

Figure 2.3.2.1: Contribution of local food to sustainable development within a destination
Source: adapted from du Rand, Heath, & Alberts (2003)

In order to maintain and enhance the community's social and economic vitality, back-linkages are being created. Those linkages between the primary food and the tourism sectors often add value to the economy as well as to the tourism product resulting in increased visitor experiences (Boyne & Hall, 2003). Food tourism not only has considerable potential to improve tourist experiences but also to assist with the branding and marketing of vacation destinations (du Rand et al., 2003).

2.3.3 Community Involvement in Sustainable Tourism Development

A sustainable community requires management of existing resources (Richards & Hall, 2000). Richards and Hall (2000) claim that an integrated sustainable approach to development must include continuous improvement in the community's economic, social and cultural welfare that is balanced with environmental renewal. It is essential that tourism development is related to the community's local needs (Murphy, 1985).

For many local councils, tourism is considered a driver of economic growth that fosters the best outcome for communities. The understanding is that with a growing economy the community prospers, which leads to improved community well-being. This assumption has been challenged by research which reveals that there is more to a healthy and sustainable community than pure economic development (Dredge et al., 2006). To achieve sustainability, local government must balance the development of the economy with community expectations, beliefs and objectives (Hall, 1994; Murphy & Murphy, 2004).

Not every resident benefits from tourism development in the same way, which may often lead to friction within the community. In terms of sustainable tourism, community participation is likely to create a suitable process for decision making and to yield a higher level of local motivation (Hall, 2000). Local participation also raises awareness and support for the conservation and protection of the environment (Eber, 2002). Tourism relies on the host community's collaboration in the provision of services (Simmons, 1994). When tourism is successful, hosts are proud, which often reflects/results in increased visitor satisfaction (Cole, 1996).

To successfully develop a new tourism product at a destination and balance market and product, it is necessary to understand the interrelations between supply and demand (Figures 2.3.3.1 and 2.3.3.2). Demand shapes supply, development and new products whereas supply shapes the markets of people interested in and able to travel. This illustrates the fundamental basis for all tourism development (Gunn, 1997).

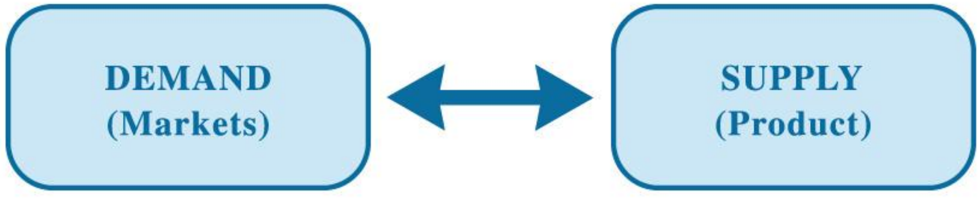

Figure 2.3.3.1: Balancing demand and supply
Source: Gunn (1997)

The tourism demand and supply model by Inskeep (1991) represents the international and domestic tourism market as well as residents of the host community on the demand side.

The community and its businesses mainly supply accommodation, tourism services, attractions and activities and transport. In the centre sits the natural and socio-economic environment of the community symbolising the core of the model.

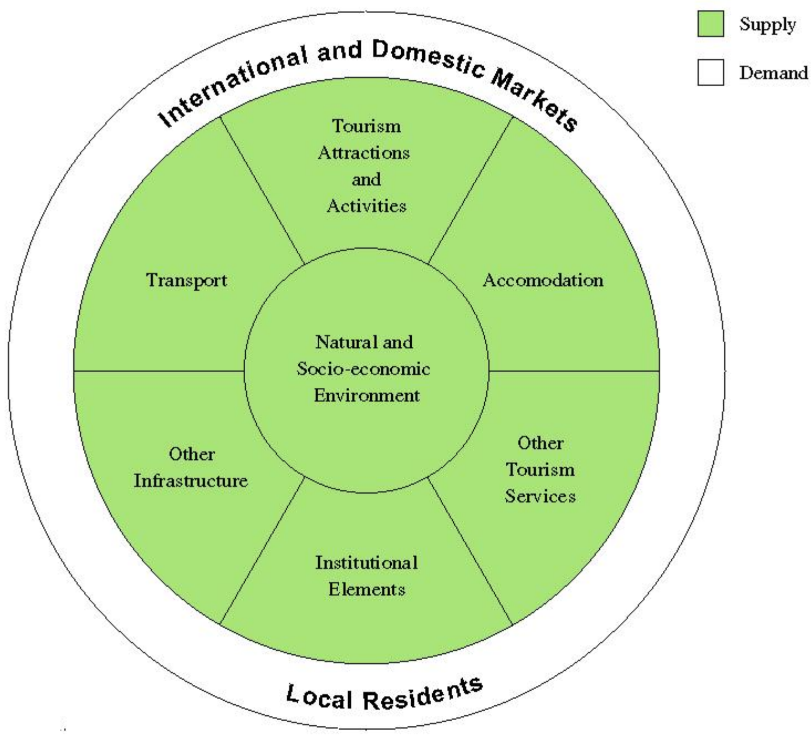

Figure 2.3.3.2: Tourism supply and demand model
Source: Inskeep (1991)

As these models demonstrate, local business cooperation and community involvement is fundamental to the sustainable development of rural communities (Caalders, 2002; Petric, 2003; Tinsley & Lynch, 2001). Also to maintain the economic sustainability in a constantly changing tourism industry, innovation is a vital part of survival for rural communities (Poon, 2003).

2.4 Innovation Framework

Innovation has become an important concept adopted by policymakers in recent years and is considered essential for realising sustainable economic as well as social objectives in rural areas. Embracing innovative practices, through the generation of qualitative improvements in processes and products, is linked to subsequent output and productivity growth. Therefore, increased incomes and improved community welfare result from economic expansion (Smith, 2006). Rogers (2003, p. 36) defines innovation as “an idea, practice, or object perceived as new by an individual or other unit of adoption.” In general, innovations are rated according to five attributes: their relative advantage, compatibility, complexity, trialability and observability. Members of any social system then determine the innovation’s value of adoption based on these features.

In New Zealand, the Government’s Growth and Innovation Framework (GIF) was intended to support long term sustainable development and growth to advance New Zealand’s quality of life. Innovation is defined as a dynamic process that creates and introduces new ideas but also new ways of approaching or doing things. Traditionally, it can be categorised either as output or as a process. With regard to policymaking, it is important to consider innovation as a system (Ministry of Economic Development, 2008b).

Innovation seen as an output means “a new or improved product, service or production process, the opening up of a new market, the adoption of a new technology, or a change to the organisation of a business” (Ministry of Economic Development, 2008b). From the process perspective, an invention is taken from the start through to marketable introduction which includes research (basic or applied), development, branding, marketing and diffusion (Ministry of Economic Development, 2008b). Innovation systems may be allocated to specific sectors, markets or regions intersecting one another. These systems can be impacted by collaboration, creativity, tacit knowledge, geography and networks, demand, evolution and by a cross-sectoral approach linking different industries (Ministry of Economic Development, 2008b).

2.4.1 Innovative Forms of Tourism

Innovation means bringing new ideas to the marketplace in order to promote sustainability. Products must target niche markets because travellers have complex, unpredictable and diverse needs. Every innovation should reflect the effective needs and expectations of travellers (Poon, 2003). O’Rawe (2002) explains that innovation in tourism can only be successful when looking at it in a wider sense. Innovative approaches ought to adopt a sustainable and holistic mixture of product and process innovation that adds value to the visitor experience as well as the host community.

Innovation also enhances quality by providing new ways of production and supply as well as service improvement (Aarsæther, 2005). However, the main point of a successful integration of innovative forms of tourism is understanding its benefits for the entire community (Rogers, 2003).

Moss Kanter (1994) explains that innovation is about finding and using new ideas to solve problems. Innovation can also be described as the creative use of products and services through the adoption of new procedures in a corporate environment or department (Moss Kanter, 1994). O'Rawe (2002) remarks that innovation is playing a big part in tourism product development and processes. Product innovation creates a competitive advantage and is unique to an organisation or destination. Innovation in tourism is continuously developing and is often dependent on co-operation. Successful product innovation is mainly based on the establishment of relationships where yield results in shared benefits. It is essential to expand alliances across different sectors. Therefore, linkages between tourism and food or retail, for example, can help to foster innovative practices and products (O'Rawe, 2002).

Regional innovative development plans increasingly consider the relationship between food and tourism. The aim of linking these two sectors is to improve the social and economic efficiency of rural areas. In this manner, a new market for local food and beverages is created to provide visitors with quality local goods. An increasingly important part of the visitor experience is to offer tourists information about the regions' harvesting methods, food safety and heritage to satisfy visitors' psychological needs and expectations (Boyne, Williams, & Hall, 2002a). In addition, creative marketing, distribution and supply strategies resulting from partnerships between retailers, distributors and producers have the potential to generate new demand as a result of visitors' loyalty to the products after having returned home. Overall, this type of competition will help drive the economy (Boyne et al., 2002a).

2.4.2 Themed Trails

Linkages between tourism and trails can be traced back to the early pilgrimages, where travellers needed supplies like food, accommodation and gifts along their journey (UNWTO, 2004a). Today, the concept of themed trails is often adopted to promote rural areas through process innovation and tourism product development. The trails are a form of tourism innovation usually driven by efficient collaboration of stakeholders. Institutions, associations and municipalities work together to link peripheral communities and foster economic development (Meyer-Cech, 2005).

In Austria, for example, themed trails like the Cheese Trail and the Austrian Iron Trail are a popular method of sustainable rural tourism development encouraged by public authorities, especially for cultural and agricultural regional schemes. The primary objectives of these trails are to draw more visitors to the region and to preserve cultural heritage (Meyer-Cech, 2004).

Food trails such as the Isle of Arran Taste Trail in Scotland tend to encourage visitors to extend their stay, enriching the individual tourist experience through the provision of overall quality across all engaged sectors (Boyne et al., 2002a). The Taste Trail has strengthened relationships between the food and tourism industries. An important feature of the trail is to inform visitors about local food and harvesting methods adding value to the visitor's stay. It also supports the local economy and community by encouraging restaurants and retailers to use local products. As a result the trail has helped to create and promote the region as a high quality food destination (Boyne et al., 2002a).

Meyer-Cech (2005, p. 137) defines themed trails as "...networks of regional attractions that are marketed under a mutual theme in order to bring potential visitors into a region. At the same time they are networks of actors – municipalities, associations, and institutions with either economic or cultural backgrounds – trying to cooperate effectively". Through the theme an identity for the entire region can be created, which establishes a regional brand based on collaborative marketing efforts (Mielke, 2000).

Production-related approach	Consumption-related approach
I Direct production-related (DPR) • Food production • Food processing • Tourism impact on local food production	III Direct consumption-related (DCR) • Restaurants • Catering/hospitality
II Indirect production-related (IPR) Tourism and food production-related: • Demand for land • Demand for labour • Demand for capital	IV Indirect consumption-related (ICR) • Tourists' utilisation of agricultural zones • Local food as marketing instrument or destination image • Consumption of tourist attractions related to agriculture (farm parks)

Table 2.4.2.1: Tourism and food relationships
Source: Boyne et al. (2002a)

When it comes to innovative collaborations, Boyne et al. (2002a) argue that the direct production related (DPR) and indirect consumption related (ICR) dimensions are the primary focus because they directly interact and stimulate each other. These two domains depend on each other, utilising their synergies (Table 2.4.2.1). For example the initiative to create linkages between tourism operators and the food producing industry (DPR) needs a strong marketing effort that promotes the destination image (ICR). In this way, local quality food attracts more tourists. These tourists, in turn, buy local produce which results in an increase in primary production (Boyne et al., 2002a).

Often, rural areas with a weak economy adopt the concept of themed trails hoping to stimulate the regional economy and to increase the revenues from non-tourism sectors. Themed trails also assist in conserving the cultural and historical landscapes and raise awareness and appreciation of the cultural heritage among residents and visitors. Culinary trails in particular help to maintain regional culture in terms of preserving the areas under cultivation (Meyer-Cech, 2005).

Additionally, themed trails help create an atmosphere of renewal and establish a brand or identity for a particular region. Having a regional identity and the ability to attract more visitors can improve a region's public image as well as residents' perceptions of their area. This can result in building not only community pride, but also a sense of place and identity in the region (Meyer-Cech, 2005).

2.4.3 Aquaculture and Seafood Trails

Globally, a number of themed trails combine aquaculture, seafood, and tourism in order to create new tourism activities for visitors and diversify the economy. Table 2.4.3.1 lists four seafood themed trails around the world.

Country	Region	Trail	Characteristics
UK	West of Glasgow	The Seafood Trail	Linking 11 establishments, focusing on a combination of accommodation and seafood
Australia	Eyre Peninsula	Seafood & Aquaculture Trail	Linking 12 seafood experiences (aquaculture & tasting tours) and dining
Australia	Southern Gold Coast	Seafood Discovery Trail	35km of coastline linking culinary and activity-based experiences from fine dining to seafood markets
USA	Louisiana (Southwest)	Seafood Sensation Trail	Part of seven joint culinary trails linking three destinations with rustic seafood restaurants and crawfish farms

Table 2.4.3.1: International aquaculture and seafood trails
Source: Louisiana Culinary Trails (2009), Southern Gold Coast (2010), The Seafood Trail (2010), Tourism Eyre Peninsula (2010)

The Seafood Trail in Scotland was established in 2005 by a marketing group in an effort to raise awareness of local seafood products. Members include hotels, bed and breakfast providers (B&Bs) and restaurants which have to be situated close to the water, source their products locally and offer at least 50% of seafood on the menu (Scotland National Rural Network, n.d.). The majority of seafood harvested from the region is exported to mainly Spain and Italy, which prompted some local residents to band together and promote local seafood in the rural region west of Glasgow (BBC Scotland, 2007). The unique aspect of the Seafood Trail is that it combines accommodation and seafood. Most of the 11 establishments which are shown in Figure 2.4.3.1 offer fresh seafood meals and high quality accommodation. There is good access to the region by car and aeroplane with the main access points being Loch Fyne, Kintyre and Argyll (The Seafood Trail, 2010).

Projects and events around The Seafood Trail such as the 'Best of Britain and Ireland Show', involve the trail to promote the Argyll region for its quality seafood, local produce and as a vacation destination (Scotland National Rural Network, n.d.).

Figure 2.4.3.1: Seafood trail members 2009
Source: The Seafood Trail (2010)

Louisiana, USA hosts the Seafood Sensation Trail, including seafood restaurants and crawfish farms from Sulphur to Delcambre. It is part of a larger network of Louisiana Culinary Trails, which comprises seven regional trails. All these trails promote the distinct and diverse culinary landscape by highlighting restaurants, and offering culinary experiences and food festivals for visitors to the region (Louisiana Culinary Trails, 2009).

Australia has currently established two Seafood Trails, the most recent being the Seafood Discovery Trail. This trail is located in the Southern Gold Coast and Tweed regions with both destinations joining forces to come up with the concept of a year-round visitor experience of local and international seafood. The trail stretches along 35km of coastline and links 68 culinary and activity-based seafood experiences (Southern Gold Coast, 2010).

The first Australian trail, known as 'Australia's Seafood & Aquaculture Trail' was considered unique when it was established in November 2002 by Tourism Eyre Peninsula (TEP). Australia's Seafood and Aquaculture Trail stretches 650km along the coast of the Eyre Peninsula from Whyalla to Ceduna in South Australia. This self drive trail links seafood, aquaculture and dining through 12 seafood experiences (aquaculture and tasting tours) in seven different places (Figure 2.4.3.2) (South Australian Tourism Commission, 2010). The Eyre Peninsula aquaculture industry reported sales of AUS$ 300 million in 2004/05. For the peninsula, the seafood industry plays a major economic role producing over 65% of South Australia's seafood and employing more than 1,800 people directly and indirectly (District Council of Streaky Bay, 2010). Tastings of bluefin tuna, abalone, prawns, scallops, oysters, and murray cod (farmed) are included in most of the tours (Tourism Eyre Peninsula, 2010).

Figure 2.4.3.2: Australia's Seafood & Aquaculture Trail
Source: Bichard (2007)

In 2006/2007, 26 businesses related to tourism and seafood participated in the trail and more than 1,700 tours were sold to 10,200 visitors. Since the inception of the trail, it has become the major tourist attraction for the Eyre Peninsula with over 80,000 tours being sold. In recent years there has been an increasing interest from visitors in fresh local seafood, resulting in the publication of the third edition of the trail brochure that identifies where fresh seafood can be purchased. The regional loyalty programme 'Seafood and Beyond...' was also launched in September 2007. The programme's reward card allows visitors to receive discounts on attractions, accommodation, and aquaculture tours. Reward points can be earned, value can be added and the collected points can be redeemed at eateries and local seafood outlets (Bichard, 2007). The success of the trail has generated interest in New Zealand, particularly with the marine farmers on the Top of the South Island.

2.5 VISITOR BEHAVIOUR

The main objective of analysing tourist behaviour is to gather an understanding of the forces that motivate travellers, influence their travel related decisions and distinguish the level of satisfaction towards the specific tourism destination (Chon, 1993). These insights are particularly beneficial to tourism planning and marketing management strategies (Bieger & Laesser, 2004; Lam & Hsu, 2005).

To understand the behaviour of tourists, the questions "*what do tourists do?*" and "*why do they travel?*" need to be addressed (Sharpley, 2008). Pearce (2005) interprets behaviour in its broadest psychological sense and uses Harré's and Secord's (1972) description which summarises it as observable activities and mental processes influenced by social life. In general, tourist behaviour should strongly guide marketing efforts and strategies which aim at selling tourism products (Lam & Hsu, 2005). The decision making process towards a specific travel destination including the purchase of various products and services is equally influenced by personal and psychological variables (e.g. attitude, motivation and beliefs) as well as by external and socio-cultural factors (travel industry stimuli, social status, culture) (Sirakaya & Woodside, 2005).

Tourist behaviour matters to tourists themselves as they are striving to maximise their satisfaction through certain behavioural patterns. Secondly, it matters to decision makers in tourism to understand demand and consequently the necessary tourism activities. Lastly, it is important to businesses to be aware of tourists' preferences, demands and behaviours as well as the socio-cultural changes affecting them in order to create customized tourism products (Figure 2.5.1). Therefore, the opinions of tourists, public sector managers and businesses are needed to build a comprehensive understanding of tourist behaviour (Pearce, 2005).

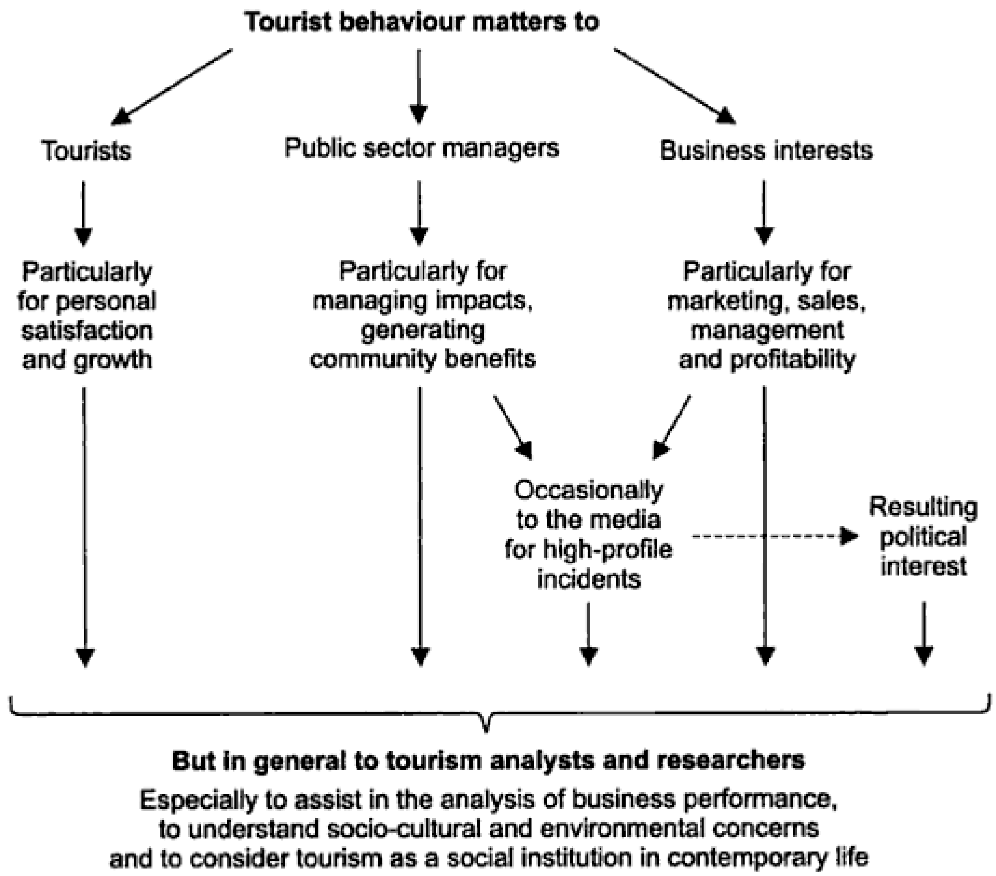

Figure 2.5.1: Entities interested in tourist behaviour
Source: Pearce (2005)

In an attempt to better explain tourist behaviour, it is helpful to look at different roles and typologies of tourists. Tourists might be clustered according to their behaviour, their expectations and how they are defined by society (Sharpley, 2008). In Cohen's (1972) research, tourists are categorised as 'the organised mass tourist' (travels on pre-arranged, inflexible itineraries without making any decisions), 'the individual mass tourist' (similar to the latter but able to make minor alterations to the trip), 'the explorer' (travels individually off the beaten track and interacts with residents and their culture), and 'the drifter' (no fixed itinerary, seeks to live in local culture and community customs).

Another important aspect of visitor behaviour is to understand where the 'spiritual centre' of the tourist is located i.e. what are they looking for and is their need satisfied by what they find in a potential destination. For example, individuals seeking a 'recreational' experience just need a holiday to relax and are not interested in learning about other cultures, whereas ‘experiential’, ‘experimental’, and ‘existential’ attractions and activities offer authentic experiences sought after by individuals who are open-minded with broad interests in other lifestyles and cultures (Cohen, 1972).

With the growing trend of sustainable tourism development, tourist typologies focusing on the environmental and cultural impacts have become increasingly important (Sharpley, 2008). Wood & House (1991) identify ‘the good tourist’ as one that is aware of sustainability, thereby implicating the ‘mass tourist’ is a bad tourist. The ‘good tourist’ has taken on responsibility as part of a sustainable travel experience. ‘The new tourist’ defined by Poon (1993) is an adventurous, flexible, and independent environmentalist who demands new forms of authentic tourism. Living in a globalised environment full of rapid changes, this quality oriented tourist knows his/her place in tourism and decides on the role he/she wants to play, be it a mass tourist seeking the interim recreation or the discerning special-interest tourist looking for an authentic experience (Feifer, 1985; Urry, 1988, 1990).

In an effort to develop a broader overall understanding of tourist behaviour it is necessary to acknowledge that typologies have to be based on a multi-dimensional matrix that incorporates demographic and socio-economic factors such as age, life cycle, gender, income, education, employment status and origin. All of these factors influence individual behaviour and affect the overall travel decision immensely (Sharpley, 2008). Figure 2.5.2 presents a comprehensive overview of factors and scenarios influencing the tourist behaviour, and therefore the overall tourism experience which need to be understood, managed and improved in order to maximise the outcome for the traveller and tourism stakeholders. The decision to travel and the choice of destination is highly impacted by internal motives and perceived destination images (Pearce, 2005). Destination images take on a significant role in individual decision making towards a travel purchase (Chon, 1993) and are usually associated to either positive, negative or neutral feelings (Woodside & Lysonki, 1989). These are referred to as individual attitudes towards a destination (Leisen, 2001).

Contemporary travel is influenced by modern society and tourists are motivated by a wide range of influences (Sharpley, 2008).

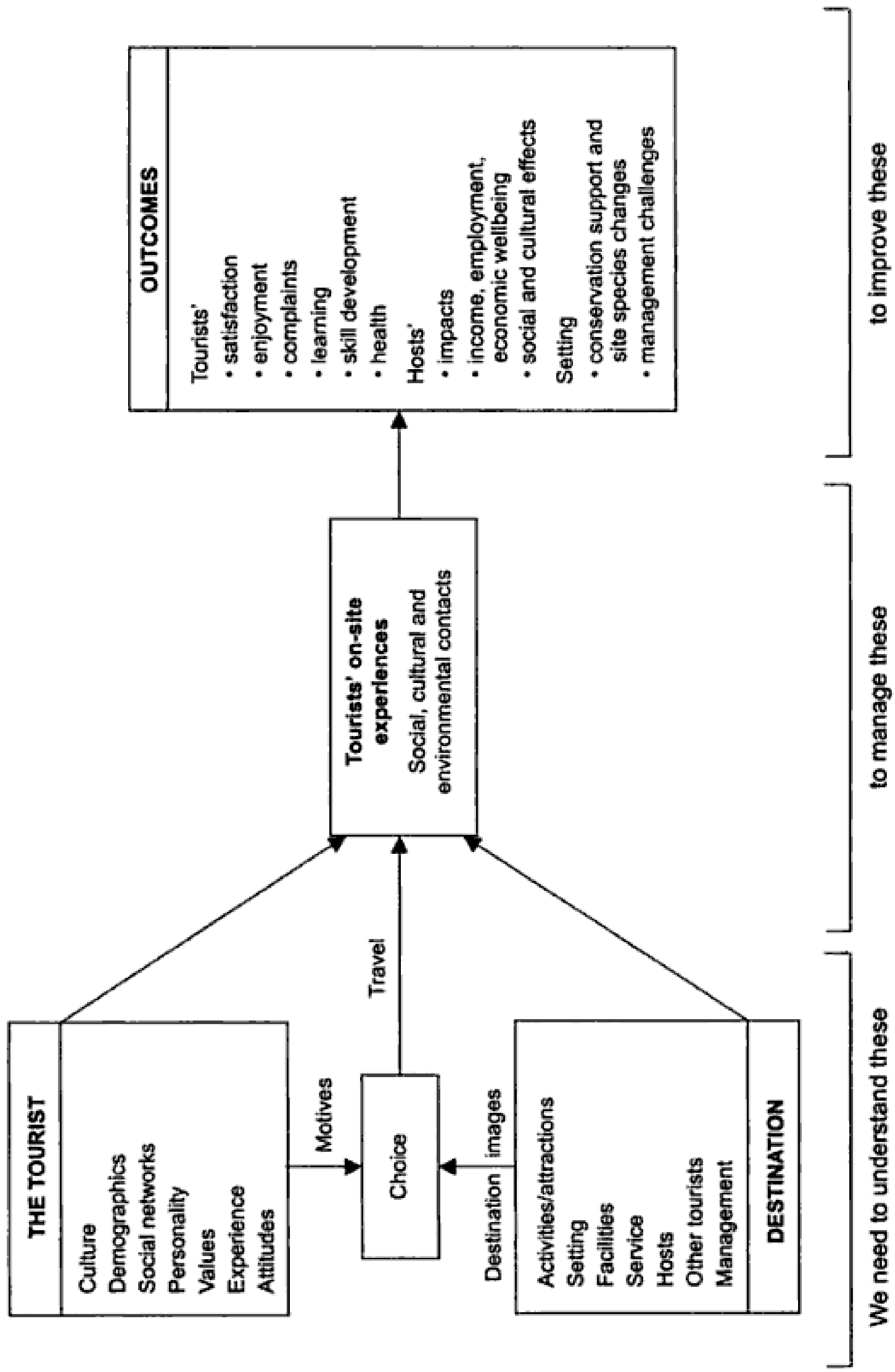

Figure 2.5.2: Concept map for understanding tourist behaviour
Source: Pearce (2005, p. 17)

2.5.1 TRAVEL MOTIVATIONS

Attempts by researchers to integrate the psychology of travel and tourist motivation have only been slightly successful. Until today, many rational and psychological approaches have been proposed but only a few are of relevance to a tourism model (Holden, 2005). According to Crompton (1979) it is possible to explain who is travelling when to where and how, based on economic and social tourism characteristics but it is unlikely that this information will comprehensively explain the question of why people travel.

Internal drivers push the individual to look for ways to release their tension or fatigue by engaging in tourism (Holden, 2005). Fodness (1994, p. 560) further argues that "the extension of functional theory to tourist motivation is straightforward: the reasons people give for their leisure travel behaviour represent the psychological functions (the needs) the vacation serves (satisfies) for the individual". In contrast, researchers also argue that tourist behaviour is influenced by external drivers. These include destination pull factors, family and reference group influences, culture, social status and lifestyle (Sirakaya & Woodside, 2005).

Maslow's (1954) hierarchy of needs integrates psychological with physiological needs and considers social and wider environmental factors. Figure 2.5.1.1 represents an adapted version of Maslow's hierarchy of needs to tourism. It aims at explaining how tourism may satisfy the different (motivational) needs of potential travellers (Pearce, 2005).

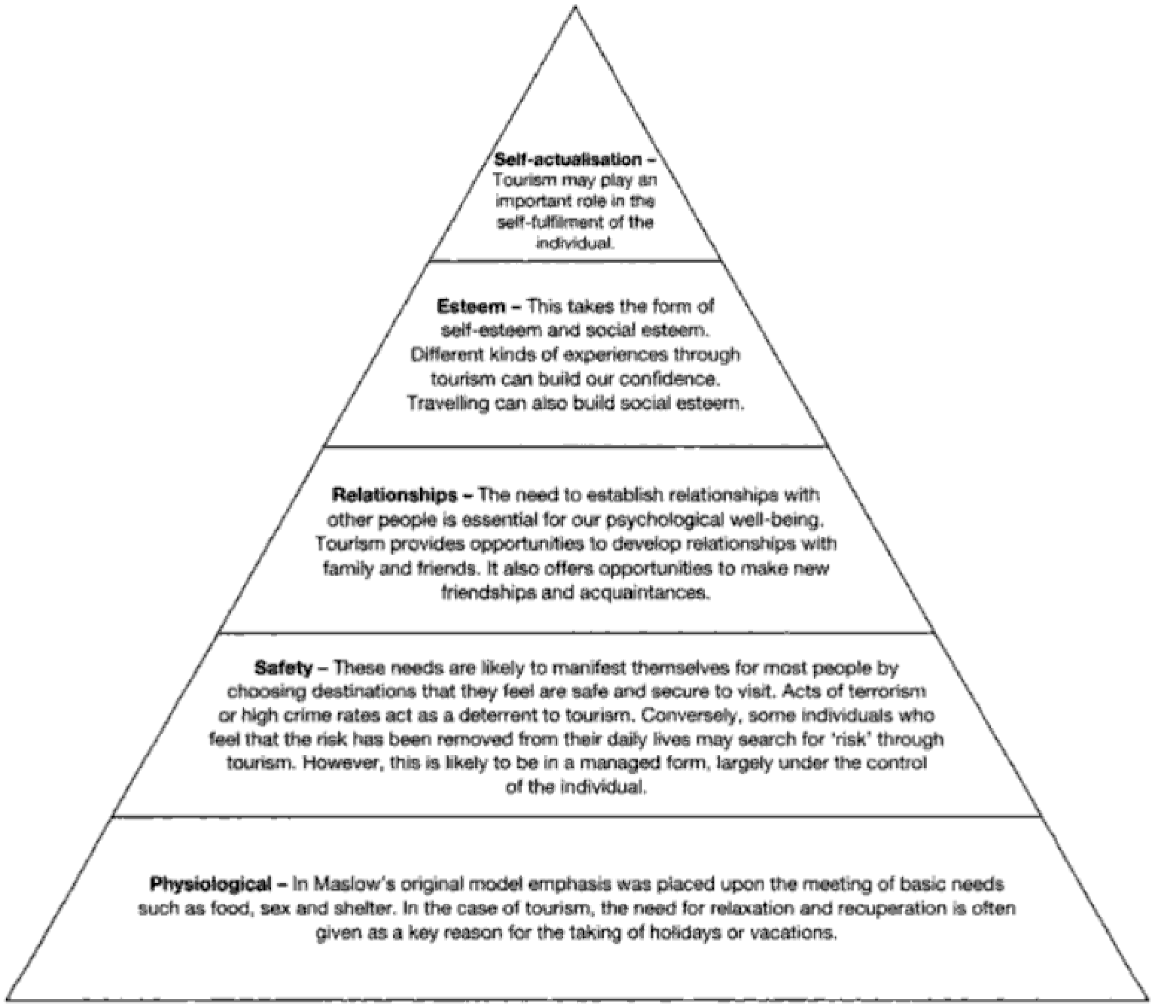

Figure 2.5.1.1: Maslow's hierarchy of needs in the context of tourism
Source: Holden (2005)

Sharpley (2006) argues that motivation to visit a specific destination is not to be confused with the real purpose of the trip. The purpose might just be a means of satisfying specific needs but a motivational push is different from a destinational pull. He refers to Crompton's (1979) model of 'push and pull' factors which strives to explain motivation. Maslow's hierarchy of needs can be regarded as push factors (Chon, 1993) based on the idea that people are being pushed towards a travel decision by internal motivational aspects and pulled by specific characteristics of a destination (Baloglu & Uysal, 1996). Push and pull factors can vary depending on traveller behaviour. The former include cognitive behaviour and socio-psychological motives that convince people to travel. The latter pull a person towards a particular destination by attracting them through a region-specific lure or a felt interest in a destination (Chon, 1989; Uysal & Hagan, 1993). Overall, people decide to travel in the first place, being pushed by internal individual motives and pulled by external characteristics of a destination (Lam & Hsu, 2005).

In an effort to fully grasp tourist motivation, it is important to explore how individual needs can be met by respective tourism experiences. Motivation triggers demand, which in most cases results in a purchase action to satisfy the aroused needs. The tourism decision and purchasing process is influenced by four factors of personal, external, social and cultural nature (Sharpley, 2006). Cooper et al. (2005) argue that these factors can impact the tourism demand or purchase process at any point in the decision making process and help to explain travel and tourism demand (Figure 2.5.1.2).

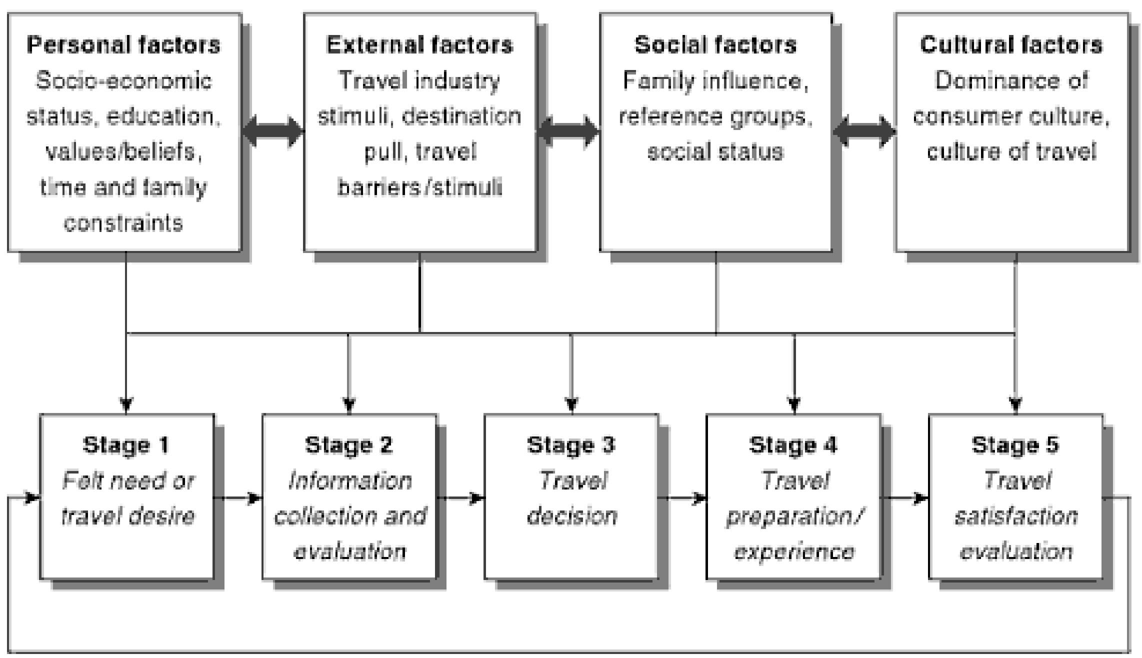

Figure 2.5.1.2: The travel decision process
Source: Sharpley (2006)

Personal factors include demographics and preferred activities amongst others (Pearce, 2005). External factors are shaped by the destination images, advertisements and tourism marketing. The influences of social and cultural factors are shaped by past and contemporary lifestyles. As soon as demand for a holiday has been created (stage 1 in Figure 2.5.1.2) a travel purchase follows in most cases (Sharpley, 2006).

Based on the consumer decision making model, Gunn (1989) adapts seven phases in a tourism context which can be allocated to stages 2-5 in Figure 2.5.1.2. She suggests that the first three points under 'anticipation' are most important in the individual travel decision and purchasing process:

<u>Anticipation</u>

1. Collection of images in one's mind about holiday experiences
2. Adaptation of the images according to additional information
3. Decision to go on vacation

<u>Travel to the site:</u>

4. Travel to chosen destination
5. Participation in the community

<u>Return travel:</u>

6. Travel back to origin

<u>Recollection:</u>

7. New collection of images founded on experiences

However, changes in tourist behaviour are influenced by values and lifestyle. Travel has become a lifestyle for the 'new tourist' (Poon, 1997) who desires the quality experience and demonstrates a 'see and enjoy, but do not destroy' manner (Derrett, 2001, p. 11). With these changes in values and attitudes comes an appreciation for different cultures and authentic experiences (Poon, 1997).

2.5.2 Socio-Cultural Influences on Visitor Attitudes

The 'modern' or 'new' tourist as argued by Chaney (1994), Poon (1994), and Richards (2005) seeks to make the most out of his/her leisure time. While it is widely recognised that these tourists look for the authentic cultural experience when on holiday it is still unclear what motivates them in the first place to make their destination choice (Van Westering et al., 2000).

The scientific approach to taste and culture explains that cultural needs such as visits to museums, preferences in arts or literature and food arise from individual upbringing, the level of education and social origin (Bourdieu & Nice, 1984).

Desforges (2000) and Lanfant (1995) argue further that planning a holiday and finding the appropriate destination is now part of one's own identity creation. Tourists are increasingly striving for knowledge and self-fulfilling experiences (Richards, 2002a). Milne (1998) states that humans are increasingly defining themselves by what they buy and through their association with the products and services they consume. For some travellers, food has become the main purpose of travel to identify and distinguish themselves from mass tourists. Over the past 40 years, travellers have become increasingly interested in discovering and experiencing the destination as well as engaging and participating in its day to day life and activities including sampling local foods (Robinson & Novelli, 2005).

Eating habits, especially the dish itself is one part of the overall lifestyle. The taste for particular meals and the way they are prepared and cooked is linked to economy, society and the difference between sexes (Bourdieu & Nice, 1984). Statements like "Man ist, was man isst" and "de gustibus non est disputandum", reflect that food is a greatly personal matter and an individual one as well (Clark, 1975).

To travel for the purpose of experiencing local food and wine reflects food tourists' preferences: they consider food tourism as some kind of 'serious leisure' (Hall & Mitchell, 2001; Hall, Sharples, & Mitchell, 2003; Hall, Sharples, & Smith, 2003). Wine and food is a considerable part of social status and cultural experience. Therefore wine and food have become important criteria for travel and destination decision-making (Hall & Mitchell, 2005).

2.5.3 THE FOOD TOURIST

Travellers motivated by local food and gastronomy are on the increase (Bessière, 1998; Macdonald, 2001). The discerning traveller often looks for traditional, local cuisine, which seldom is offered by a mass tourism industry. It is this clientele, not the mass tourist, who need to be focused on in terms of creating demand for regional food (Torres, 2003). Boniface (2003) identifies the main type of the typical person who would travel for food and drink as likely to be well-educated and discerning, probably into Third Age with the habit of taking the tourism experience slowly. Although, according to Hall, Sharples, and Smith, (2003) many people show an interest in local food and are happy to taste it while travelling, the majority is not proactively looking for it.

Figure 2.5.3.1 gives an overview of food tourism on a continuum to measure tourist's motivation for food when travelling. Food tourism is broken down into gourmet tourism, gastronomic and cuisine tourism, culinary tourism as well as rural/urban tourism. These categories are organised by level of visitor interest in food from highest to lowest. For example food would be considered as a primary travel motivation if tourists show a high interest in visiting specific restaurants or food markets. This visitor segment would tend to be smaller in number than the majority of travellers who have a low interest in food but have to stop at a restaurant because they have to eat (Hall, Sharples, & Smith, 2003).

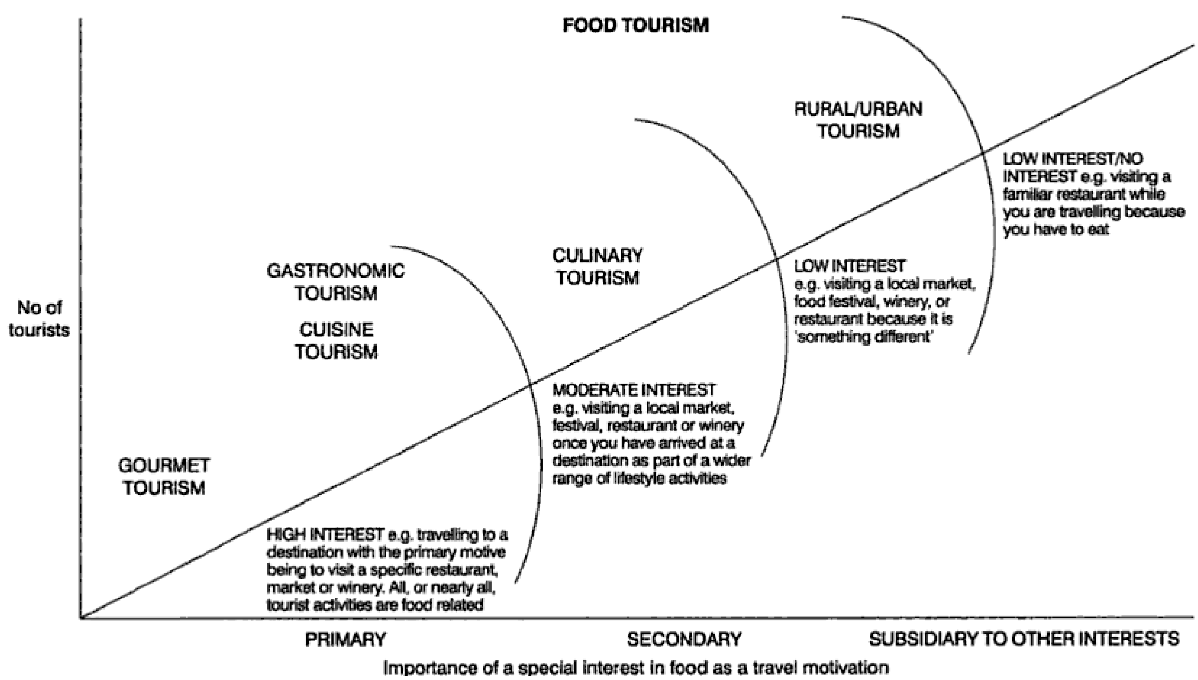

Figure 2.5.3.1: Food tourism as special interest tourism
Source: Hall & Sharples (2003)

In gastronomic tourism, food is the main purpose of travel and the tourist experience includes participation in cooking school classes, visits to wineries and restaurants and if possible, taking part in a festival around food (Kirshenblatt-Gimblett, 2004).

2.6 SUMMARY

Understanding what motivates people to travel and the factors influencing their behaviour in order to choose a holiday destination is invaluable to tourism destination planning and marketing (Lam & Hsu, 2005).

In profiling the SIT participant including the food tourist, it is necessary to emphasise the influence of cultural tradition, to involve the presented socio-psychological motivation models, and to analyse tourist typologies. Motivation is driven by fashion and trendsetting. By choosing special SIT activities like food tourism travellers expect personal prestige advancing their social or cultural status (Derrett, 2001). Tourists are willing to pay more for authentic food experiences; they spend a significant amount on food and beverage while travelling. A study conducted in 1995 in San Francisco revealed that an estimated 28% was spent on food and beverages per visitor daily (Hall & Sharples, 2003).
To be able to determine the most efficient management approach and maximise sustainable benefits for the community in the Top of the South it is important to understand visitors' attitudes and interest towards the Aquaculture and Seafood Trail.

The models presented in this section aim to explain tourism behaviour and why it is important to understand what motivates travellers to go on holidays and where. As shown in Figure 2.5.1, these insights matter to tourists, public sector managers and tourism businesses, and serve the purpose of efficient planning and marketing. Various factors influence individual behaviour and the overall travel experience and need to be analysed to improve tourists' satisfaction as Figure 2.5.2 displays. Maslow's hierarchy of needs (Figure 2.5.1.1) provides a deeper insight into motivations to travel. Figure 2.5.1.2 shows the travel purchase decision making process, which is influenced by these internal as well as external factors.

3 METHODOLOGY

This chapter explains the research design and its methods for collecting, analysing, deducing, and reporting data which have been adopted to comply with the main aim and objectives of this study (Creswell & Plano Clark, 2010). The main aim of the study was to gain knowledge of visitors' attitudes and determine the level of their interest and support for the integration of tourism and aquaculture related to the TSAST.

The evaluation of visitors' interest for a seafood themed trail was led by the fulfilment of the following four objectives:

- Inventory of tourism and aquaculture development in the case study site and statement of current roles of the two industries.
- Establishment of a demographic and psychographic visitor profile at the case study site to understand their interest in seafood and justify a seafood themed trail.
- Investigation of visitors' attitudes and expectations towards the seafood experience in order to rationalise the development of an aquaculture and seafood trail.
- Evaluation of the traits and benefits of a themed trail and ways it can support an innovative and sustainable approach to peripheral tourism planning.

Every approach to research is guided by a paradigm which is a world view – an interpretive framework that consists of a "basic set of beliefs that guides action" (Guba, 1990, p. 17), in this case the researcher's inquiry. All paradigms consist of the following beliefs: ontological, epistemological, axiological and methodological (Mertens, 2007). The ontological belief includes the nature of reality (Creswell, 1998), whereas epistemology is about the nature of knowledge and the relationship between the researcher and the research topic (objectivity, subjectivity). Axiology refers to the researcher's values or ethics. The technique which is applied to explore the reality in question is grounded in the methodology (Tashakkori & Teddlie, 2003).

The pragmatic worldview applies the methodological approach that works best for the research question under study. Hence, research design is determined by 'best use' procedures and methods that best meet particular inquiry demands (Patton, 1988).

3.1 Research Design

As one part of a larger research project, the present research adopted a case study approach using a questionnaire for gathering primary data. According to Yin (2009) various methods for data collection can be applied in a case study approach. In this case, the objective of the research was to gain visitor data in a given timeframe which could be achieved by conducting a questionnaire. A series of questions had to be answered by respondents in order to obtain a representation of the current state of visitors to the Nelson/Marlborough and Golden Bay region (Janes, 1999). The use of a questionnaire within the case study approach was justified because the specific context and individual settings of the case study site in the Top of the South were of particular importance in examining visitors' attitudes towards seafood and their interest in activities related to the seafood trail (Darke, Shanks, & Broadbent, 1998).

Numeric primary data is collected in experiments and/or surveys by the use of closed-ended questions and predetermined scaling instruments that yield statistical data (Creswell, 2003). A well designed questionnaire will motivate respondents to provide correct and complete information which in return should grant reliable and relevant data (Oppenheim, 1998).

This study is part of an international project comparing innovative best practices of sustainable tourism in peripheral regions of Northeast Iceland and the Top of the South Island in New Zealand. The findings of this study are practice-oriented and will assist tourism stakeholder groups in the Nelson/Marlborough and Golden Bay region and in Iceland to initiate a process for strategic planning and decision making (Dul & Hak, 2008). The larger research was conducted in four stages:

1. Comparative profiling of the case study sites through reviewing of secondary information to determine the present conditions of tourism in the two sites.
2. Ethics application, implementation of pre-tests, and administration of business and key stakeholder surveys as well as the visitor survey (online and on-site) in New Zealand and key stakeholder surveys in Iceland.
3. Data analysis in cooperation with the Icelandic Tourism Research Centre, Clemson University's International Institute for Tourism Research and Development and the New Zealand Tourism Research Institute.
4. Publications in international academic journals and conference presentations.

Focused on the specific perspective of the visitor, the current research presents one part of a mix of different methods and approaches aimed at understanding the sustainability of tourism in peripheral regions.

3.1.1 The Case Study Approach

Case studies have been adapted to tourism research, following best practice in humanities and social sciences research. These studies are central to tourism research and teaching (Beeton, 2005). Case studies are repeatedly used as research tools to explain multifaceted social trends in relation to real-life events, especially in a situation of change (Yin, 2009). The proposed project was conducted according to a regional case study approach using primary and secondary data collection. Case study approaches often investigate single- or multiple case studies and are part of comprehensive research strategies (Veal, 2006; Yin, 2009).

Regional studies are designed as individual case studies with the objective of describing and interpreting a specific situation. In addition, case studies attempt to answer the 'how' and 'why' questions about a contemporary set of events and are very important to evaluation research (Yin, 2009). The current research assisted in exploring visitor attitudes and the links between the seafood industry and tourism in the Nelson/Marlborough and Golden Bay region in New Zealand.

The visitor survey in the Top of the South addressed the "WHAT questions" (what kind of visitors come to the region and what is their level of interest and support for the TSAST?). Additionally, the case study dealt with the "HOW question" (how are current conditions of tourism and the seafood industry supporting a seafood themed trail?) and the "WHY question" (why should the TSAST be further developed?) to determine what can be learned from the case in a context of sustainable tourism. The exploratory design does not usually strive towards generalisation. In this research, the case study approach served the aim to gain an insight into visitors' potential demand for a seafood trail, providing a basis for recommendations and propositions for further inquiries (Creswell, 2003). It has been claimed by Jennings (2001) that the significant advantage of case studies lies in their flexibility and suitability for clarifying and understanding tourism concepts such as a seafood trail.

3.1.2 THE RESEARCH INSTRUMENT

The questionnaire was used as an inductive method to explore visitors' attitudes and expectations towards seafood and tourism based on closed-ended and open-ended questions. The questionnaire consists of two different kinds of closed-ended questions which are directly comparable and easy to interpret as well as open-ended questions being more difficult to analyze and interpret. Dichotomous questions encompass two possible opposing outcomes (yes and no) and multichotomous questions offer an array of possible answers in the manner of a multiple choice procedure (Beiske, 2002). Open-ended questions provide respondents with the opportunity to express their views. The primary intent was to develop themes from emerging data of the answers to the open-ended questions (Creswell, 2003).

Closed-ended questions were mainly used to collect data concerning demographic and psychographic characteristics of visitors to gain an understanding about who visits the region. Additionally, standardised Likert scales gathered quantifiable data about attitudes and behaviour towards seafood, seafood related activities, and tourism. The same survey, then also used open-ended questions to collect more in-depth information on visitors' travel motives, their opinions about the development of the region into a 'seafood destination' as well as their experiences and expectations about purchasing locally harvested seafood.

With the priority on closed-ended questions in the current survey, the open-ended questions provide a small qualitative database and are used in a secondary role to complement and validate the quantifiable results (Creswell & Plano Clark, 2010).

The main reason to apply the method of a questionnaire in this study was led by the pragmatic worldview implying the most pragmatic approach to data collection. Due to a relatively short timeframe to collect data in the field and the limitation in research locations, a questionnaire was considered the most appropriate tool to capture a 'snapshot in time' of visitors to the Top of the South. Employing a questionnaire, allowed the researcher to put together an explanation of the way visitors perceived the region, what they expected from it and how they felt about merging the seafood and industry sectors (Bryman, 2006). The open-ended questions are embedded within a larger questionnaire design. This parallel or convergent pattern serves the purpose "to obtain different but complementary data on the same topic" (Morse, 1991, p. 122) to better grasp the research problem (Creswell & Plano Clark, 2010).

3.1.3 SECONDARY AND PRIMARY DATA COLLECTION

Secondary Data Collection

The theoretical background in the literature review consolidates knowledge about niche, rural and food tourism, innovation in tourism, themed trails, conceptual models of visitor behaviour and attitude, as well as sustainable tourism development in peripheral regions. It also summarises the efforts in other destinations to link seafood and tourism in rural regions through themed trails.

The review of literature provides a context for the present study. Information was gathered from peer-reviewed academic and documentary resources such as books, novels, magazines and newspapers, as well as from regional reports regarding aquaculture, seafood, and tourism. Web-based research along with a review of government documents and journal articles provided an invaluable addition to the study. According to Veal (2006) it is vital to identify the existing literature as it provides information from previous research conducted in the same field, and often adds knowledge that should not be overlooked. It also assists in generating ideas on topics for the research in order to formulate a framework of questions for the primary data collection (Maxwell, 2005).

Primary Data Collection

Primary research, also known as field research, encompasses a variety of different methods to collect relevant data. For the present study, and as part of a case study approach, the primary research tool developed to collect the data is a questionnaire with open-ended and closed-ended questions that examine and evaluate visitors' attitudes and their interest towards seafood, tourism, and aquaculture. The on-site questionnaire gathered information about domestic and international visitors to the Nelson/Marlborough/Golden Bay region at three different i-SITEs and one tourism operator.

During a site visit in the Nelson/Marlborough and Golden Bay region between the 3rd and the 16th of January 2010, 45 questionnaires were collected at the i-SITE in Nelson, 11 respondents filled out the questionnaire in the Blenheim i-SITE and 15 at the i-SITE in Picton. Customers of the tourism operator Cougar Line contributed 25 completed questionnaires to a total of 100. Depending on their level of English skills, the duration to fill out a questionnaire ranged from 20 to 40 minutes. Questionnaire survey techniques are most commonly used in tourism studies as part of a quantifiable data approach (Veal, 2006).

3.2 Questionnaire Framework

The researcher was present at all times in order to answer questions from respondents. The questionnaire was based on previous questionnaires that have examined the links between seafood and tourism. In addition, it was designed in English as the target audience consisted of a mixture of international and domestic visitors. The questionnaire was divided into six sections, addressing the following topics:

1. Characteristics of the most recent trip to the Nelson/Marlborough and Golden Bay region
2. General preferences regarding seafood
3. Preferences regarding eating and purchasing seafood in the Nelson/Marlborough and Golden Bay region
4. Beliefs and expectations regarding seafood during the recent visit
5. Interest in activities related to seafood and marine aquaculture opportunities associated with the visitors' recent visit to the Nelson/Marlborough and Golden Bay region
6. Background information

Section one clarified the individual purpose of the trip, how much time people spent in the region, with whom they were travelling and how. This section also contained eight open-ended questions about visitors' opinions towards turning the Nelson/Marlborough and Golden Bay region into a seafood destination (a destination that is renowned for its local seafood, aquaculture and activities related to the marine farming environment), the advantages and disadvantages people saw in this development, and how they would like the region to be promoted.

The second and third sections focused on seafood preferences, meaning the kinds of seafood people eat and how often. It was also important to find out where visitors would like to purchase the seafood and what they are looking for in terms of quality and sustainability.

In section four special attentions were paid to understanding the respective beliefs of visitors and their attitudes regarding their consumption of seafood on the coast.

Visitor interest and knowledge about seafood-related activities and marine aquaculture were collected in section five. This section helped to understand whether people are interested in learning more about the main asset of the region and if they would participate in innovative and interactive tourism activities.

The last section captured information on visitor demographics.

This research involves human participants who were questioned using a written questionnaire, therefore ethics approval from AUTEC was required before the research could be commenced. To ensure a high level of ethical research the following principles were considered and adhered (AUT, 2009):

Key Principles:

- Informed and voluntary consent;
- Respect for rights of privacy and confidentiality;
- Minimization of risk;
- Truthfulness, including limitation of deception;
- Social and cultural sensitivity, including commitment to the principles of the Treaty of Waitangi/Te Tiriti O Waitangi;
- Research adequacy;
- Avoidance of conflict of interest.

Other Relevant Principles:

- Respect for vulnerability of some participants;
- Respect for property (including University property and intellectual property rights).

Once the questionnaire was drafted, it was pre-tested and reviewed by tourism experts from the institutes involved in the study and changes were advised. Ethics approval for the questionnaire was then sought and granted by the AUT Ethics Committee on 17 November 2008 with Ethics Application Number 08/271.

3.2.1 SAMPLE SELECTION AND TARGET AUDIENCE

The quantitative approach is designed as a cross sectional study, which is most commonly used when investigating a specific situation, attitude or issue such as visitor attitudes towards seafood and tourism. This approach provides an overall impression at the time of the study by interrogating a cross-section of the population (Kumar, 2005) visiting i-SITEs or tourism operators in the Top of the South Region. For quantitative research larger sample sizes are standard to ensure a representative sample, with numbers often ranging from 50 to the thousands (Veal, 2006). In this study, the collection of 100 questionnaires allowed the researcher to compare the visitor profile data from the case study site with the visitor profile data from Tourism New Zealand demonstrating significant consistencies.

In the fieldwork, the researcher targeted domestic and international visitors, excluding visitors under the age of 20. Participants were chosen arbitrarily and in an unstructured way. The survey utilised a convenience sample, which was based on non-probability. Merely visitors who were available at the time and place of the researcher's choice had the opportunity to participate in the survey. Due to the lack of control over the selection of the sample (it mostly depended on the goodwill of the people to participate) it is likely that the sample size is less representative of the general population (Brotherton, 2008).

As part of the larger research project on visitor attitudes in the Top of the South, an online visitor survey was administered from April 2009 to April 2010 at i-SITEs in Nelson, Blenheim, Picton and Takaka by the New Zealand Tourism Research Institute (NZTRI). It was negotiated that i-SITE staff would randomly hand out specific vouchers to customers inviting them to participate in an online questionnaire. i-SITE staff would collect email addresses of customers and send them to the NZTRI in Auckland where an email with the link to the survey was generated. The field researcher worked with i-SITE staff to make sure that visitors who participated in the questionnaire did not also get asked to participate in the online survey.

3.2.2 On-Site Questionnaire Settings

The Nelson i-SITE, which is a gateway to the Golden Bay region (Abel Tasman National Park) and information provider about Nelson city, the i-SITEs in Blenheim and Picton, representing Destination Marlborough, and the tourism operator Cougar Line in Picton were considered appropriate places to target international and domestic visitors for the survey. Tourists who come to a specific region are most likely to have pre-booked activities and researched the destination beforehand. i-SITEs provide the opportunity to collect further information about the specific region or make additional bookings for tourism activities. Eighty eight percent of international visitors to i-SITEs are seeking 'general information about the current region' and 44% are interested in 'specific paid activities' (TIANZ, 2008).

Cougar Line provides a water taxi service in Picton, with a variety of different options to experience the Marlborough Sounds. These range from water taxi services leaving from Picton to any starting point of the Queen Charlotte Track, to wedding cruises and specialised eco cruises (Cougar Line, 2010). Customers are supposed to check in at the office counter at least half an hour before the boat departs. All Cougar Line and i-SITE customers were considered potential respondents for the questionnaire. Cougar Line was chosen due to the significant number of tourists participating in activities and tours around Queen Charlotte Sound.

Permission to approach visitors at the i-SITEs in Nelson, Blenheim, and Picton as well as at Cougar Line was received from the CEO of Nelson Tasman Tourism (NTT), the i-SITE managers and the general manager of Cougar Line prior to the on-site conduction of the survey. Picton is a small township of 4,000 residents but being a transportation node with the ferry arriving from Wellington three times per day during the summer season, visitor numbers are estimated to reach up to 20,000 a day (Lohmann & Pearce, 2010).

3.2.3 Conduction of the Survey

Depending on their request, visitors to the Nelson i-SITE had to wait up to 60 minutes. These visitors were approached and asked by the researcher whether they would like to participate in the survey and fill out the 30 minutes questionnaire. It was mentioned that if they participated in the survey they would be eligible to enter a lucky draw for a case of Marlborough Sauvignon Blanc wine or a night's accommodation at the Mercure Picton Marlborough Sounds in Picton. For that, they needed to provide their email address so that they could be contacted in case their name was drawn. If they agreed, they were handed the questionnaire. Every participant needed to give notice by signing the consent form for the survey and was advised that the responses were confidential. They were told that it was an anonymous survey and they did not have to provide their name or email address if they were not comfortable with it. Through the presence of the researcher on site, some of the disadvantages, such as self-selecting bias (participants do not return questionnaires), absence of interviewer to clarify any issues, and participants working in groups, could be minimised (Kumar, 2005).

A similar procedure was applied at the Blenheim and Picton i-SITEs. Visitors waiting for customer service and visitors seeking information about the area by studying the displays were the most frequently targeted by the researcher. Overall, the majority of people asked at these three i-SITEs participated in the survey. Visitors who declined were either in a hurry or did not feel comfortable taking part in the survey due to insufficient English language skills.

The administration of the questionnaire at the tourism operator Cougar Line was slightly different from the i-SITEs. The researcher approached customers after they had finished their check in with the Cougar Line staff. They were asked if they would like to participate in a survey while they were waiting to board the water taxi. Approximately five out of fifteen tourists having checked in for a boat agreed to participate in the survey while the remaining 10 could not participate due to lack of time to fill out the questionnaire.

3.3 Data Analysis

The questionnaire generated numeric and qualitative data sets for statistical analysis and subsequent interpretation. Before the collected data could be entered into an aggregation system, it had to be coded and converted into reliable composite variables. For the sake of completeness a coding handbook was created. Every close-ended response from participants was turned into numeric data in order to enable a statistical analysis through SPSS 17.0 (Statistical Package for the Social Sciences) and directly entered into the system by the researcher. In general there are two main sources of data errors while entering the data: by a respondent who might have filled out two answer options instead of one or by the researcher who might have assigned the wrong code. In this research, data was double-checked for skew and repaired accordingly by a statistical analyst and cleaned to ensure correct coding and precise data entry. The integrity of data was checked against consistency, accuracy and correctness (Jennings, 2001).

Due to the convergent design, which prioritises the quantitative over the qualitative strand, the latter mainly had to be transformed. After the first analysis of each of the two data sets, the qualitative data had to be quantified by clustering qualitative themes and creating new variables out of them. This transformation enables the results of the two data sets to be combined, directly compared and interrelated for further analysis (Creswell & Plano Clark, 2010). In order to evaluate the findings, means of the Likert scales and frequencies of the results of single answer and multiple answers questions were reported.

3.4 Limitations of the Study

Questionnaires have the potential to collect data that is inaccurate. Although the questions and the way they were asked were carefully chosen and pre-tested, limitations may occur because respondents sometimes tend to underestimate or exaggerate while answering the question or they do not recall information correctly (Veal, 2006). The primary data collection relied on the accuracy and honesty of the respondents. According to Fowler (2009), a survey methodology always aims at minimising error in the collected data and at measuring the unavoidable error in any questionnaire. The inference from sample to population may be influenced by a sampling error i.e. people who are not able to understand or speak English cannot fill out the survey and therefore some countries might be underrepresented. Responses to the questionnaires might also be invalid due to the fact that people's answers are not 100% correct or do not mirror their true experiences, attitudes or expectations (Fowler, 2009). A further limitation is that non-probability sampling in social research is often adopted due to time and cost constraints, but has its weaknesses in terms of generalisation. Unlike probability sampling, population parameters cannot be estimated from sample statistics, meaning that it is unknown if the chosen sample being studied is representative of the general population (Singh, 2007).

Despite these constraints, the data collected provide a valuable foundation of knowledge about visitors' attitudes towards seafood and tourism in the Nelson/Marlborough and Golden Bay region and also can provide guidance for local policymakers in their decision making to further develop a sustainable seafood trail in the region.

3.5 VALIDITY AND RELIABILITY OF APPLIED METHODS

To ensure the delivery of tangible study results to stakeholders and decision makers in the Nelson/Marlborough and Golden Bay region, research data has to be reliable and valid (Jennings, 2001). Babbie (2008, p. 157) defines reliability as "a matter of whether a particular technique, applied repeatedly to the same object, yields the same result each time" and validity (p. 160) "refers to the extent to which an empirical measure adequately reflects the real meaning of the concept under consideration". Reliability and validity are aiming at the appropriate measurement of what is intended to be measured. Reliability can be achieved through the utilisation of standardised measuring instruments and validity can be guaranteed by making sure that what is being measured is measured appropriately (Babbie, 2008; Jennings, 2001).

So as to maximise the overall validity of recent study the following validity types were addressed accordingly (Babbie, 2008; Creswell, 2003; Jennings, 2001).

- Internal validity: standardised methods were used in the questionnaire, i.e. clear closed-ended and open-ended questions about seafood and tourism along with seven-point Likert scales to investigate attitudes, habits, knowledge and expectations of visitors.

- External validity: the results of this research only apply to the Nelson/Marlborough and Golden Bay region and their visitors without aiming at generalisation. It stands to reason that people who like seafood would be more interested in a seafood trail than people who do not like seafood.
- Content validity: seafood propensity was not the only measure in the concept, but also the level of interest in marine farming and aquaculture activities as well as expectations about the trip to the Top of the South.
- Construct validity: theoretical models and frameworks as discussed in the literature review were used as a foundation for the current research.
- Statistical conclusion validity: This study aimed at avoiding data manipulation and at maximising accurate data inferences. A comprehensive rather than a fragmentary data analysis was granted by applying appropriate statistical tools.

Yin (2009) distinguishes between construct validity, internal validity, external validity, and reliability in a context of a case study approach. With the purpose of addressing construct validity, during the data collection, reports of events, formal studies, proposals and articles from mass media and community papers were documented sources of evidence and were used in combination with data collected from the questionnaire. The case study data builds up a chain of evidence and leads to conclusions and results that help to answer the main research questions as written up in the final thesis, i.e. the inclusion of flawless citation, the schedule of the questionnaires, and the transparent cross-referencing between methodological procedures and resulting evidence. Internal validity is built through case studies that “do explanation building”. This study has looked at similar case studies in the literature review and has built a foundation for further research in order to support the external validity of the research. The case study has been researched and documented thoroughly to ensure the reliability and validity of procedures and to facilitate the replication of the study which would lead to the same results (Yin, 2009). In order to provide a more detailed context for analysis, the natural, cultural and socio-economic assets of the case study site are discussed in Chapter Four.

4 THE TOP OF THE SOUTH CASE STUDY

This chapter provides an outline of the case study site alongside a detailed description of the "The Top of the South's Aquaculture and Seafood Trail". The regional profile and the concept of the trail provide key background information in terms of integrating the research findings and the theory as a basis for the discussion of the results. This section illustrates the most distinctive regional characteristics and explores how history, social and economic influences in the top of the South Island have shaped the case study site and the region as a tourist destination. It also defines the visitors who come to spend their holidays in the Nelson/Marlborough and Golden Bay region.

4.1 GEOGRAPHY AND CLIMATE

New Zealand is comprised of two main islands (North and South) located between the Antarctic Circle and the Tropic of Capricorn in the Pacific Ocean (Figure 4.1.1). The total length of the country is ca. 1,600km which stretches over a land area of 270,000km^2 with 15,134km of coastline (The New Zealand Tourism Guide, 2010). The top of the South Island, which is made up of the Nelson/Marlborough and Golden Bay region covers the north of New Zealand's South Island (Figure 4.1.2). These regions amount to about 27,800km^2 (including the 12 nautical miles outer limits of territorial sea) and present about 18.5% of the entire area of the South Island (151,000km^2) (The Department of Internal Affairs Te Tari Taiwhenua, 2006). The city of Nelson is in the centre of New Zealand with a latitude and longitude of 41°18'S and 173°16'E. Although New Zealand's latitudes pass through the world's temperate zone, the climate is affected by the surrounding sea (MapXL Inc., 2010).

Figure 4.1. 1: World map locating New Zealand
Source: www.tourism.net.nz

The Nelson/Marlborough and Golden Bay region is renowned for its good weather: because it is geographically sheltered it receives more sunshine than all other parts of the country (Tourism New Zealand, 2010a). Nelson city is recognised as the "sunshine capital" of New Zealand with a total of 2,571 sunshine hours in 2009 (The New Zealand Herald, 2010). Characteristic summer temperatures range from 20° to 26° during the day and annual rainfall averages in 942mm (NIWA, 2010).

Figure 4.1. 2: The case study site – Top of the South
Source: www.nelsonnz.com

4.2 History of the Region

Te Tau Ihu o Te Waka – The Prow of the Canoe – Nelson and Marlborough (Te Tau Ihu)

Māori legend says that demi-god Maui's canoe was uplifted on the rising land and became New Zealand's South Island. Maui then caught a giant fish that became the North Island (Mitchell & Mitchell, 2004). Historically, it is believed that the first humans to set foot on New Zealand came from Polynesia in 1300. The second wave of settlers were the Maori, thought to have also originated from Polynesia (Nolan, 1976).

Golden Bay was reported to have been the setting of the first contact between Māori and Europeans when the Dutchman Abel Janszoon Tasman sailed to the shores in December

1642. Due to the killing of four members of his crew during this encounter, Tasman named today's Golden Bay as 'Murderers Bay' and left the coastline without further exploration (Mitchell & Mitchell, 2004). The existence of a fabled great southern continent remained unconfirmed until 1769 when Captain James Cook who was commissioned to explore the Pacific Ocean by the British Government landed in New Zealand. One of his preferred places to conduct ship maintenance, map territories and trade with the local Māori was Ship Cove at the outer end of the Queen Charlotte Sound. He paid several visits to this sheltered area in the Marlborough Sounds between 1770 and 1777 (Mitchell & Mitchell, 2004). In the early 1800s Europeans colonised the shores of Golden Bay for the purpose of whaling and sealing (MacDonald, 2003). Around that time, the New Zealand Company was founded in England and entered in negotiations with local Māori to buy land in the area to establish a new settlement. This land was sold in 1842 to the early settlers who mainly came from Britain, Germany and Australia (Stephens, 2009). Early European history in Nelson and Marlborough was of a pastoral nature including settlers, farmers, explorers, and gold diggers. In 1853 Nelson became the South Island's first organised settlement (Kennington, 2007). It was named after the first Viscount Nelson, Admiral of the ship fleet that overpowered the French and Spanish armada in 1805 during the Battle of Trafalgar (Make New Zealand Home, 2010).

4.3 THE NELSON/MARLBOROUGH AND GOLDEN BAY REGION

As shown in 4.1 and 4.2, the different areas of the Nelson/Marlborough and Golden Bay region have close historical and geographical ties. In 1989 the 'Nelson-Marlborough Regional Council' included Nelson, Tasman (Golden Bay) and Marlborough. The Council separated three years later into three Unitary Authorities. The 'Regional Profile of Nelson', published by Statistics New Zealand (1999), points out the particularly close links between Nelson, Tasman and a number of Marlborough regions which share various services based in Nelson. These services include manufacturing industries that support the agriculture and fishing sectors of the surrounding countryside and coastal areas (Statistics New Zealand, 1999). The region is defined by the Ministry of Agriculture and Forestry (MAF) (2010a) as rural due to its vast agricultural importance, comprised of the production of wool, wine and hops next to the significant roles of horticulture, forestry, fishing and aquaculture (MAF, 2010b).

Table 4.3.1 summarises the main characteristics of the region in terms of land area, urban area, population, demographic information and tourism features. The most important industry sectors are listed in descending order of importance and indicate the major contributors to the regional economy (GDP) (Statistics New Zealand, 2010d).

	Nelson	Marlborough	Tasman (Golden Bay)	Total
Land Area	443 km²	12,494 km²	14,813 km²	27,750 km²
Urban Areas	Nelson	Blenheim Picton	Nelson (part)	N/A
Population **Female** **Male**	42,891 22,101 20,790	42,558 21,333 21,225	44,625 22,470 22,155	130,074 65,904 64,170
Median Age	39.4	41.7	40.3	N/A
Post School Qualification	41.9%	36.8%	38.7%	N/A
Personal Income	$23,100	$23,300	$21,600	N/A
Regional Features	Culturally rich Arts & craft galleries Historic buildings	Sounds QC Track Vineyards	Abel Tasman NP Kahurangi NP Wildlife watching	N/A
Key Economic Drivers & GDP	Horticulture $325m Forestry $306m Seafood $268m Tourism $134m Rural farming $106m	Viticulture $342m Aquaculture $126m Forestry $112m Aviation $118m Tourism $83m	Horticulture $325m Forestry $306m Seafood $268m Tourism $134m Rural farming $106m	N/A

Table 4.3.1: Basic area characteristics and demographic data
Source: Based on Marlborough District Council, Nelson City Council, & Tasman District Council , Statistics New Zealand (2008a, 2008b, 2008c, 2010d)

The main occupational groups in the Top of the South Island are agriculture, forestry, fishing and manufacturing. In 2006 there were 13,671 businesses listed in the region with a significant proportion of small and medium enterprises (SME) related to these industries (The Department of Internal Affairs Te Tari Taiwhenua, 2010a).

As represented in Table 4.3.2, the aquaculture sector is of high importance to the fishing industry. The Top of the South produces more than 80% (mainly comprised of Greenshell mussels [perna canaliculus], Pacific Oyster [Crassostrea gigas], and King Salmon [Oncorhynchus tshawytscha]) of the country’s aquaculture export, generating over

NZ$200 million per year (MFA, 2009b). Aquaculture makes up a significant part of all New Zealand exports. In 2009 total seafood export value was NZ $1.42 billion with a share of NZ$279 million from aquaculture exports (Ministry of Fisheries, 2010). Greenshell mussels contributed the largest share with an export value of NZ$204.3 million, followed by King Salmon and Pacific Oysters (Aquaculture New Zealand, 2010a; MFA, 2009b; Ministry of Fisheries, 2010).

Aquaculture has expanded to become the second largest industry sector in the case study site since its establishment in the 1970s (Ministry of Fisheries, n.d.-a). The Marlborough region comprises 2,831ha of aquaculture area, mainly farming mussels and salmon in the Pelorus and Kenepura Sounds. There are no farms in the Queen Charlotte Sound. Nelson also has no marine farms but its major port hosts the majority of the seafood processing businesses. Golden Bay and Tasman Bay have an approved area for mussel farming and mussel and scallop spat catching of 246ha (Ministry of Fisheries, n.d.-a, n.d.-b; MFA, 2009a, 2009b). The processing facilities are located in Nelson, Motueka, Picton, Blenheim, Renwick and Havelock (MFA, 2009a, 2009b).

2009	District Council	Agriculture, Forestry and Fishing	Aquaculture	Fishing	Seafood Processing
Employee Number	Nelson	980	75	760	870
	Marlborough	5,720	200	50	540
	Tasman	4,850	35	45	460
Average Annual Growth (%)	Nelson	0.0	10.7	2.8	-8.5
	Marlborough	8.9	4.1	13.6	1.9
	Tasman	-0.8	3.9	-8.8	-6.0
Region's Share (%)	Nelson	0.9	11.4	42.0	16.9
	Marlborough	5.2	30.4	2.8	10.5
	Tasman	4.4	5.3	2.5	8.9

Table 4.3.2: 2009 Workforce in seafood related industries in the Top of the South
Source: based on Department of Labour (2009)

Table 4.3.2 provides an insight into employment in the different sectors related to seafood. Of the 16 Regional District Councils in New Zealand, Marlborough ranks first in aquaculture (30.4%) and Nelson's share in fishing (42.0%) is the largest nationwide. In terms of seafood processing, Nelson ranks second (16.9%) and Marlborough third (10.5%) with their regional shares (Department of Labour, 2009). The ongoing growth of the seafood sector in these areas reinforces the economic importance of the seafood industry for the Nelson/Marlborough and Golden Bay region.

2009	District Council	Accomm. & Food Services	Scenic & Sightseeing Transport	Water Transport	Amuse-ment & recreation	Travel Agencies	Cafés, Rest. & Take Away
Employee Number	Nelson	2,510	15	250	30	65	1,080
	Marlborough	2,540	60	60	12	70	800
	Tasman	2,110	25	0	100	80	920
Ave. Ann. Growth (%)	Nelson	0.3	0.0	-2.8	-9.6	2.0	3.0
	Marlborough	1.5	7.5	4.7	-12.0	0.0	0.0
	Tasman	1.8	5.7	0.0	-8.1	5.3	5.6
Region's Share (%)	Nelson	2.3	0.8	5.3	0.8	1.0	1.4
	Marlborough	3.5	3.4	1.3	0.3	1.0	1.0
	Tasman	2.8	1.4	0.0	2.5	1.2	1.2

Table 4.3.3: 2009 Workforce in the tourism industry in the Top of the South
Source: based on Department of Labour (2009)

Table 4.3.3 shows employment in the tourism industry. Most people work in accommodation and food services as well as in cafés, restaurants and take–away outlets. Growth rates for these areas are moderate but indicate continued potential (Department of Labour, 2009). Overall, in 2006 there were more than 600 tourism businesses in the Nelson Tasman region alone which contributed approximately NZ$302 million to the economy of the region (Nelson Tasman Tourism, 2010d).

In order to improve the quality of life in the Top of the South, the three District Councils released an evaluation of the social well-being in the regions (Marlborough District Council, Nelson City Council, & Tasman District Council, 2009). Accordingly, residents feel a strong connection and sense of belonging to the community in which they live and have a positive attitude about the regions. Locals perceive their districts to be relatively safe places with the highest crime resolution rate throughout New Zealand. Nearly 1000 residents work in arts and recreation activities and are engaged in cultural occupations resulting in a broad variety of cultural offerings and opportunities for tourism. Being aware that the area is an important tourist destination, councils collectively work towards environmental sustainability, reflecting the overall satisfaction of residents with the quality of the natural environment. The region maintains very good water quality at bathing beaches, which is important as the coastal waters are extensively used for recreational activities (Marlborough District Council et al., 2009).

4.3.1 Local Authorities

The district councils' main purpose in the region is to provide services and goods to the communities. Councils are obliged to take decisions and foster the cultural, social, environmental and economic well-being of community members. As mentioned before, the Top of the South is divided into three government councils; Nelson City Council, Marlborough District Council and Tasman District Council (Figure 4.3.1.1). In terms of urban settlements, Nelson is the only city in its district and Blenheim is the biggest town in the Marlborough District. Other sizeable townships include Picton, situated at the Queen Charlotte Sound inlet, and Havelock at the end of the Pelorus Sound (Destination Marlborough, 2010a). Tasman District's largest and fastest growing urban settlement is Richmond with a population of around 11,000. The second largest township is Motueka which is also the entry point to the Abel Tasman National Park. Takaka, Wakefield, and Brightwater are also part of the Tasman District (Tasman District Council, 2010a).

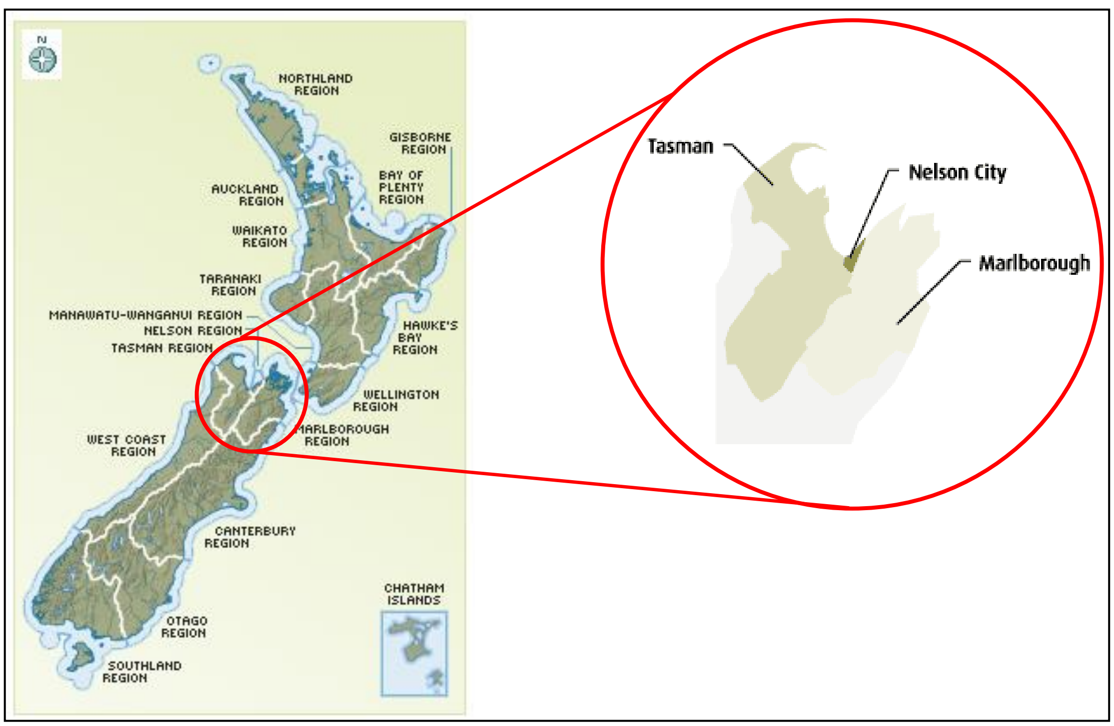

Figure 4.3.1.1: District councils in the Top of the South
Source: www.localgovt.co.nz

The councils of Nelson, Marlborough and Tasman are three out of five Unitary Authorities in New Zealand. These councils combine the two roles of territorial and regional responsibilities in one local government body covering one geographical region (Nelson City Council, 2009b). According to the Local Government Act 2002, unitary councils can become engaged in various activities and events, provided they consult with the people of the respective district. This enables the community to have their say in decisions that will concern them directly (The Department of Internal Affairs Te Tari Taiwhenua, 2010b).

Among the responsibilities of territorial and regional authorities are fresh water supplies; waste control; parks, reserves and recreational facilities; roads; management of land subdivision; libraries and museums; bio-security and pest control; environmental protection; water quality regulation; maritime navigation and safety; and elections and public meetings (see Figure 4.3.1.2) (Nelson City Council, 2009a). At district and city level, Territorial Local Authorities (TLAs) are comprised of city and district councils, and unitary authorities, and serve as an interface to local government. Connection between the local community and the local government are the community boards (Dymond, 2008).

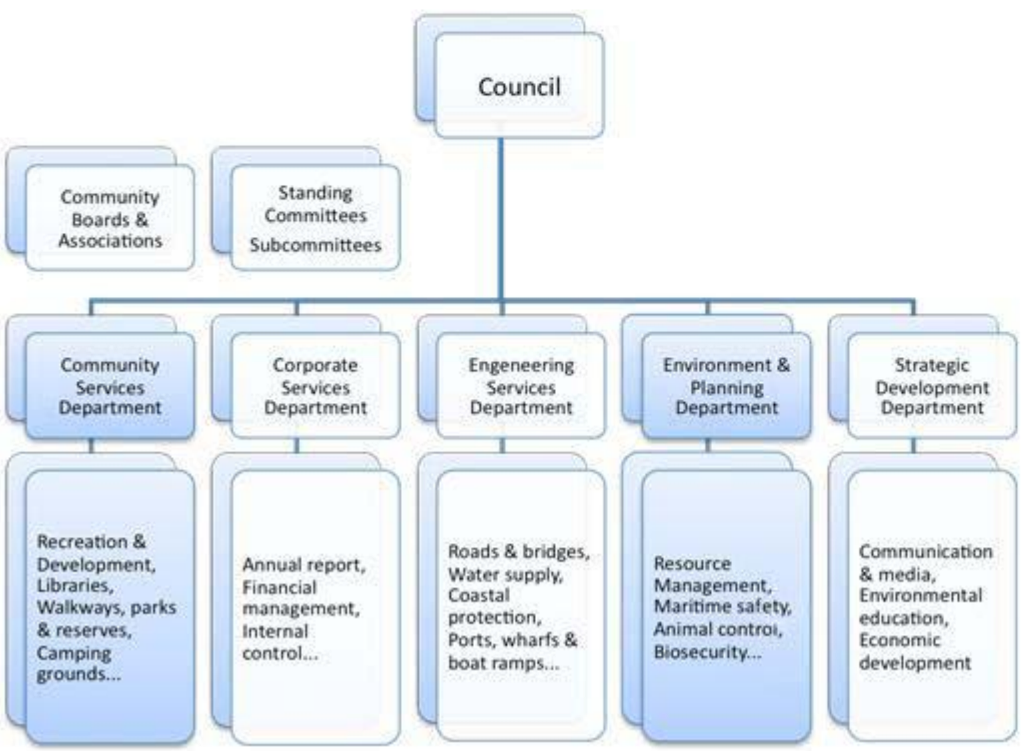

Figure 4.3.1.2: Council Structure
Source: based on Tasman District Council (2010b)

Although the council is not fully in charge of tourism development, the concerns of the sector often overlap with its departments for community services, environment and planning. The council's Community Services Department is assigned to administer and maintain recreational assets like walkways, parks, and camping. Similarly, the Environment & Planning Department is paving the way for tourism development (Figure 4.3.1.2). Managing resources is closely connected to various matters affecting tourism practices and vice versa. Nature based activities are not always compatible with environmental protection and can create pressure and conflict. To foster sustainability, the councils and tourism authorities have to adopt and advance integrated management of resources such as land, water and coastal areas in the region (Marlborough District Council, 2007). Local authorities regulate tourism by being accountable for most planning and infrastructural investment (Kearsley, 1997; Pearce, 1990). With the purpose of stimulating the domestic travel market, Regional Tourism Organisations (RTOs) have been established in order to drive local authorities and to deal with tourism matters (Dymond, 2008).

4.3.2 REGIONAL TOURISM ORGANISATIONS

Thirty RTOs are located all over New Zealand, most of them working closely with the tourist information centres called i-SITEs which are endorsed by Tourism New Zealand. RTOs provide information on their respective regions and their local tourism products (Tourism New Zealand, 2010c).

In the Top of the South, the tourism authority is administered by the two RTOs – Nelson Tasman Tourism (NTT) and Destination Marlborough – as Council Controlled Organisations (CCO). Nelson Tasman Tourism is funded by the councils of Nelson and Tasman, embracing those two combined areas that include the three National Parks of Nelson Lakes, Abel Tasman and Kahurangi as well as Nelson city and the townships of Murchison, Golden Bay, Motueka, and Richmond (Figure 4.3.2.1).

Figure 4.3.2.1: RTOs in the Top of the South
Source: www.newzealand.com

RTOs are the interface between tourism operators, national tourism associations and local and central government (Ministry of Economic Development, 2008a). The main purpose of RTOs in the Nelson Tasman and Marlborough regions is to market and develop the Top of the South as a tourism destination (Figure 4.3.2.2). As such, the priorities of RTOs are set to provide quality experiences to international and domestic visitors, generate social and economic benefits for suppliers, partnering businesses, and the community and to ensure a sustainable approach to maintain natural characteristics of the region (Destination Marlborough, 2010b; Nelson Tasman Tourism, 2010a).

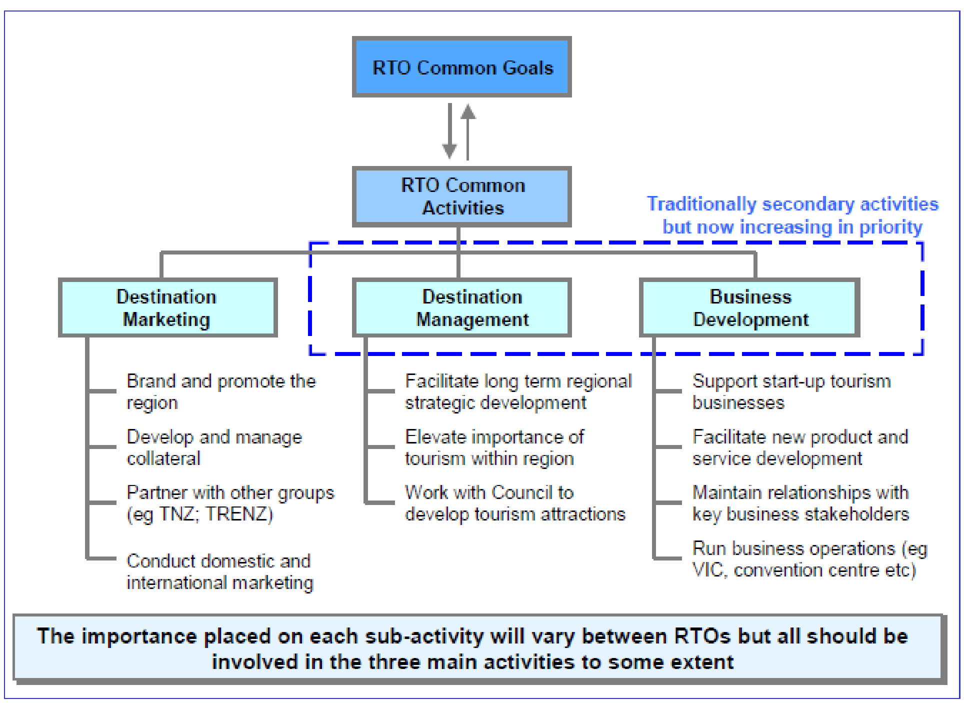

Figure 4.3.2.2: Three main areas of RTO activities
Source: Nelson Tasman Tourism Business Plan 2009-2010 (Davis, 2009)

NTT is able to provide quality visitor information services due to ownership and operation of the Nelson i-SITE, Golden Bay i-SITE (Takaka), and the visitor centre in Murchison (associate i-SITE). It also funds the independently run Motueka i-SITE (Davis, 2009). Destination Marlborough operates two i-SITE centres - one in Blenheim and one in Picton which represent the points of contact between Destination Marlborough and visitors (Ferraby, 2009).

Sustainability is a core facet of tourism promotion by NTT whose primary objective is to contribute significantly to the social, cultural, economic and environmental development of the region (Davis, 2009).

4.3.3 Tourism in Nelson/Marlborough and Golden Bay

The Top of the South has served as a safe haven for travellers, be it Māori traders and war parties, European explorers (e.g. Captain James Cook) or visitors seeking new tourism experiences. From that time on, the region has developed into New Zealand's largest visitor destination based on the quantity of total visitor activities offering facilities and infrastructure that encourage year-round tourism (Davis, 2009). Nelson/Marlborough and Golden Bay are famous for year-round sunshine, which promotes outdoor activities. Wineries, history, gardens, arts and crafts and marine pursuits are a few examples of activities in the region that serve as themes for trails (Tourism New Zealand, 2010d). The adjacent regions Nelson, Marlborough and Golden Bay in the Top of the South combine artisan culture, native cuisine and traditional wineries. Secluded yellow sand beaches are Golden Bay's hallmark while Nelson likes to call itself 'the centre of arts and crafts'. Marlborough claims the title of 'largest wine growing region' in New Zealand while Havelock has named itself 'Greenshell Mussel Capital of the World'. This highlights what the regions are famous for (HavelockNZ, 2010). According to a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis, undertaken by NTT, strengths of the region are the "growing wine and food scene" and the increasing "national reputation for seafood" (Davis, 2009, Appendix 2).

Access to the region is available in a variety of ways. A three-hour ferry ride between the North and the South Island interlinks Wellington and Picton. Direct flights from the international airports Auckland, Wellington and Christchurch link these hubs with Nelson and Blenheim. The TranzCoastal Train runs along the coast from Christchurch via Blenheim to Picton (Destination Marlborough, 2010a).

The region is considered to be one of New Zealand's best for an outdoors-related holiday. According to the Department of Conservation (DOC) (2009) it offers various natural areas (Table 4.3.3.1) including three national parks and four marine reserves (Long Island, West Haven, Tonga Island and Horoirangi).

Nature / Tourism Area	Characteristics
Abel Tasman National Park (22,530 hectares)	Smallest National Park in New Zealand offering golden, forest-fringed beaches and a sheltered coastline. The Coast Track is 51km trampable in three to five days.
The Buller	Largest river catchment renown for its brief history of gold-mining. New Zealand's most popular white-water kayaking with opportunities to hunt.
Golden Bay	Variety of natural and historical locations. Waikoropupu accommodates New Zealand's main freshwater spring and several walks discover the Puponga Farm Park at the bottom of the bird habitat Farewell Spit.
Kahurangi National Park (452,002 hectares)	Offers many short walks with historic, geological and botanical focus and two three to six day walks: the Heaphy and Wangapeka tracks.
The Marlborough Sounds	Waterway network providing many land and water activities like hiking or mountain biking the one to five days (67km) long Queen Charlotte Track or sea-kayaking.
Nelson Lakes National Park (101,733 hectares)	Northernmost part of Southern Alps with lots of walking around forests, lake shores and ranges as well as hunting, fishing, skiing and climbing opportunities.
The Richmond Ranges	Several short walk chances whereas the Pelorus Bridge Scenic Reserve offers camping, swimming and the 3-4 days long Pelorus Track.
The Waimea Basin	Most populated part of entire region featuring a number of short walks with the Cable Bay Walkway combining nature and history and wonderful sea and ranges views.

Table 4.3.3.1: Nature / Tourism areas' characteristics in the Top of the South
Source: based on www.doc.govt.nz

Activities in and around these areas (Figure 4.3.3.1) range from bird and wildlife watching, caving, climbing, diving/snorkelling, fishing, swimming with dolphins, four wheel driving, horse riding, hunting, kayaking/canoeing, boating (motor and sailing), mountain biking, rafting, and skiing, to guided, scenic boat tours and relaxing at world class wineries. Alongside the three Great Walks, Abel Tasman Coast Track, Heaphy Track, and the Queen Charlotte Track, the region has more than 300 other walks to offer (DOC, 2009).

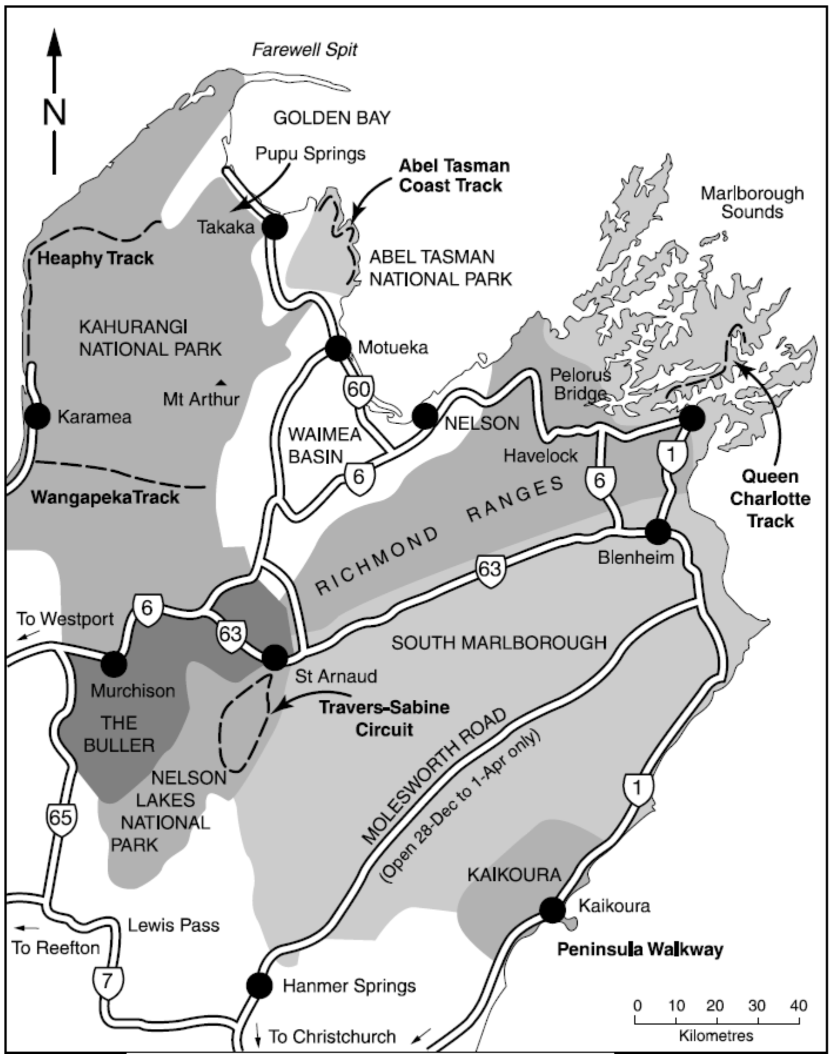

Figure 4.3.3.1: Map of DOC nature areas (shadings) in the Top of the South
Source: www.doc.govt.nz

For visitors who are less active, there are many things to do as well (Tables 4.3.3.2 and 4.3.3.3). In particular, food tourism activities and restaurants offering local food and beverages can be found as the region is known for its local produce. The most famous vineyards are around the Nelson and Marlborough areas. Marlborough is New Zealand's largest winemaking region with currently 15,900 hectares of cultivated land. The Marlborough region has an international reputation for producing superb Sauvignon Blanc, as well as Chardonnay, Pinot Gris, Riesling and Pinot Noir (Wine Marlborough, 2010).

Tourism Attraction Art & Culture	Number	Location
Museums	5	Nelson, Richmond, Motueka
	4	Blenheim, Renwick, Havelock – Marlborough
	3	Takaka, Collingwood, Rockville – Golden Bay
Art Galleries	10 (listed online)	Nelson, Richmond
	3 (listed online)	Blenheim, Renwick - Marlborough
	9 (listed online)	Golden Bay
Self-drive Trails		
Treasured Pathway/Heritage Trail,	1	Blenheim, Picton, Marlborough Sounds, Wairau
Classic New Zealand Wine Trail,	1	Runs through & terminates in Marlborough
New Zealand Arts & Crafts Trail	1	Awatere to Marlborough Sounds
Festivals		
Marlborough Wine Festival,	1	Blenheim – Marlborough
The Marlborough Wine Weekend,	1	Blenheim – Marlborough
Summer Food & Wine Festival,	1	Pohara – Golden Bay
Collingwood Summer Food Fair,	1	Collingwood – Golden Bay
Arts Festival,	1	Blenheim – Marlborough
Nelson Arts Festival,	1	Nelson
Mussel Festival Havelock	1	Havelock – Marlborough

Table 4.3.3.2: Arts & culture tourism attraction overview Top of the South
Source: based on Destination Marlborough (2010d), Golden Bay Promotion Association (2010a), Havelock Mussel Festival Inc. (2009), MarlboroughNet Online Media (2010a), Nelson Tasman Tourism (2010c)

The region offers 13 gourmet experiences, which mainly focus on wine tastings and degustation meals to match the wines. Lunch menus at exclusive wineries feature local specialties such as blue cod and smoked salmon. One of the more innovative tourism experiences allows visitors to join chefs in the kitchen (Tourism New Zealand, 2010b). Other gourmet tourism experiences focus solely on locally harvested seafood. There are three aquaculture tours in the region, which concentrate first and foremost on Greenshell mussels, education about mussel farms and harvesting procedures. A mussel tasting is included in the tours (Marlborough Travel, 2010). Blenheim offers an array of cafés and restaurants that serve Greenshell mussels from Havelock which itself accommodates the 'Havelock Mussel Pot', displaying a giant pot full of green-lipped mussels in its roof. Many waterfront restaurants in Nelson indulge customers with Golden Bay scallops and fresh local ingredients. The culinary approach is followed throughout the Top of the South, offering numerous eating opportunities (Tourism New Zealand, 2010b).

Tourism Guided Tours	Number	Location
Eco-Tours/Adventure	17 2	Marlborough Nelson / Golden Bay
Mountain Biking	3 6	Nelson / Golden Bay Marlborough
Fishing & Hunting	5 4	Marlborough Nelson / Golden Bay
Sea Kayaking	11 4	Marlborough Nelson / Golden Bay
Gourmet Experiences	10 3	Marlborough Nelson / Golden Bay
Aquaculture Tours	3	Havelock, Blenheim

Table 4.3.3.3: Overview tourism guided tours
Source: based on Destination Marlborough (2010c), (Destination Marlborough, 2010c; Golden Bay Promotion Association (2010b), Nelson Tasman Tourism (2010b)

Due to the weather conditions, the top of the South Island is fortunate enough to take advantage of its fertile grounds. Its locally grown grapes and crafted beers from breweries in Nelson and Blenheim are typically ideal to combine with locally harvested seasonal food, such as asparagus, fruits, olives, and vegetables, as well as with the year-round availability of seafood like crayfish, blue cod, snapper, salmon, Greenshell mussels and scallops, and with other meat such as beef, wild game and lamb (MarlboroughNet Online Media, 2010b). For local restaurants this abundance of regional food enables cooperation between restaurants and primary industries, including seafood and aquaculture. This minimises economic leakages by making use of local resources rather than foreign sources (Hall, Sharples, & Mitchell, 2003).

The people in top of the South Island, especially in the Marlborough area, are fully aware of the natural assets and have been developing the region into a gourmet region that offers a variety of locally harvested food for the discerning visitor (Bilton & Jackson, 2008).

The abundance of high quality farmed seafood has established the region's reputation as a destination offering quality cuisine (MarlboroughNet Online Media, 2010c).

4.4 The Top of the South Aquaculture and Seafood Trail

The MFA, representing marine farmers' interests in the Nelson/Marlborough and Golden Bay region, has taken advantage of this culinary trend offering an innovative approach in linking the aquaculture/marine farming and tourism industries. In order to build collaboration between fisheries and tourism stakeholders, the idea was to promote the region as a seafood destination. As a way to diversify the economy and at the same time preserve community character, the 'Top of the South Aquaculture and Seafood Trail' was introduced in 2005 (Jodice, Hull, & Simira, 2010). Based on 'Australia's Seafood and Aquaculture Trail', an initial brochure was assembled and distributed via participating businesses to market the trail (Figure 4.4.1). To attract members for the trail the MFA's executive director followed the potential route and invited selected businesses to participate in the project. Traversing the Top of the South, the trail now stretches 350km from Kaikoura to Takaka, linking 21 businesses along the route. The concept of the trail is to bring together stakeholders involved in fresh seafood production, mussel farms, restaurants, accommodation, as well as local tour operators, in order to provide additional benefits for the communities (Hull, Jodice, Sassenberg, & Sirima, 2009).

Figure 4.4.1: Brochure of the 'Top of the South Aquaculture and Seafood Trail
Source: Hull et al. (2009)

Primarily, the idea of the trail arose as a strategy to raise awareness about aquaculture and to address issues of conflict resolution. The exponential growth of aquaculture and tourism over the past 30 years has deepened disputes about coastal resources in the adjacent communities of the Nelson/Marlborough and Golden Bay region. Some ecotourism operators and residents believe mussel farms disturb the view of the pristine coastal landscape and cause conflict for recreational activities such as sea kayaking. In addition, environmental lobby groups have advised the public of aquaculture farms' negative ecological impact on the marine environment (Jodice, Hull, & Sassenberg, 2009). The trail's initial objectives were to educate residents and visitors about aquaculture's economic significance to the region and to enhance community perceptions and attitudes about the presence of marine farms. Along with these goals, the trail was intended to raise awareness in the community of the potential advantage that aquaculture could add to a coastal tourism destination (Sassenberg, 2009).

Currently, there are a number of businesses linking seafood and aquaculture with a unique tourism experience. Table 4.4.1 provides an overview of operators involved in tourism and seafood. Businesses marked with a star are part of the 'Top of the South Aquaculture and Seafood Trail'.

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	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)

Table 4.4.1: Businesses involved in tourism and/or seafood
Source: Sassenberg (2009)

The 'Top of the South Aquaculture and Seafood Trail' links the Marlborough Sounds, Tasman Bay and Golden Bay recognised as New Zealand's largest region for salmon and mussel farming (The New Zealand Seafood Industry Council Ltd., 2009). Marlborough contributes 68% of the national production of Greenshell mussels, 75% of King Salmon, and 5% of Pacific Oysters. Aquaculture in the Golden Bays produces 3% of all Greenshell mussels in New Zealand and 1% of Pacific Oysters. In the Marlborough Sounds alone there are 522 operating or consented aquaculture farms (Marlborough District Council, 2007).

Although aquaculture and marine farming related ecotourism is relatively new to New Zealand, it is already established in several countries (FAO, 2007). This research will be a valuable tool in terms of advancing this type of marine tourism experience.

4.5 VISITORS TO THE NELSON/MARLBOROUGH AND GOLDEN BAY REGION

A themed food trail is a popular approach to attract the increasing numbers of culinary tourists who are looking for unique food and beverage experiences (Sassenberg, Jodice, & Hull, 2008).

According to the Ministry of Economic Development (2010) the Top of the South had a total of 3,706,012 visits in 2009. On average, visitors stayed 5.86 nights and spent a total of NZ$566 million in the region. For a detailed listing of visits to the region, average length of stay and expenditures refer to Table 4.5.1.

2009	Overnight visits	Day visits	Total visits	Visitor nights	Ave nights/ overnight visit	NZ $ m Expenditure
Domestic	1.225,060	1.543,982	2.769,042	3.396,623	5.47	354
International	685,061	251,909	936,970	2.294,152	6.56	212
Total	1.910,121	1.795,891	3.706,012	5.690,774	5.86	566

Table 4.5.1: Visits to the Nelson/Marlborough and Golden Bay region
Source: based on Ministry of Economic Development (2010)

For 57% of these visitors, the main purpose of their trip was a 'holiday', 27% visited family and friends and 12% were on business trips (Ministry of Economic Development, 2010) (Table 4.5.2).

	Marlborough	Nelson Tasman	Total
Holiday	876,764 57%	1.231,464 57%	2.108,228 57%
VFR	417,704 27%	570,994 26%	988,698 27%
Business	189,798 12%	251,014 12%	440,812 12%
Education	15,850 1%	48,481 2%	64,331 2%
Other	33,073 2%	70,869 3%	103,942 3%

Table 4.5.2: Visits related to the purpose of the trip to the Nelson/Marlborough and Golden Bay region
Source: based on Ministry of Economic Development (2010)

Table 4.5.3 indicates that there are a few differences in demographics of domestic and international visitors to the case study site. Domestic visitors to the region tend to be a bit older than international visitors in general. There are more male domestic visitors than female, which is the opposite with international visitors. Most domestic tourists have a second home in the region or stay in motels whereas international visitors prefer to stay at campgrounds or backpackers. In terms of tourism activities dining ranks first for domestic visitors and second for international visitors. Both domestic and international tourists rely on cars as the main mode of transport.

	Nelson Tasman				Marlborough			
	International June 2010		Domestic June 2010		International June 2010		Domestic June 2010	
Age	25-34	25%	15-24	19%	25-34	27%	45-54	21%
	15-24	21%	45-54	19%	55-64	18%	55-64	20%
	45-54	15%	25-34	18%	45-54	16%	35-44	18%
	55-64	15%	35-44	17%	65+	15%	15-24	15%
	35-44	12%	55-64	17%	15-24	13%	25-34	14%
	65+	11%	65+	11%	35-44	10%	65+	12%
Gender	Female	52%	Male	60%	Female	50%	Male	53%
	Male	48%	Female	40%	Male	50%	Female	47%
Accommo-dation	Backpacker	27%	2nd home	45%	Campground	22%	2nd home	44%
	Campground	23%	Motel	21%	Motel	22%	Motel	17%
	2nd home	18%	Campground	14%	Backpacker	19%	Campground	11%
	Motel	16%	Hotel	4%	Hotel	13%	Hotel	9%
	Hotel	11%	Backpacker	3%	2nd home	13%	Backpacker	4%
Activities	Walk / Trek	72%	Dining	28%	Walk / Trek	41%	Dining	31%
	Dining	42%	VFR	21%	Dining	34%	VFR	18%
	Nature	39%	Walk / Trek	19%	Wineries	27%	Walk / Trek	11%
Transport	Car / Van	63%	Car / Van	89%	Car / Van	61%	Car / Van	83%
	Ferry	30%	Aeroplane	8%	Ferry	41%	Ferry	19%
	Coach / Bus	20%	Ferry	4%	Campervan	18%	Aeroplane	6%
	Campervan	16%	Coach / Bus	2%	Coach / Bus	8%	Coach / Bus	1%
	Aeroplane	14%	Campervan	1%	Aeroplane	4%	Campervan	1%

Table 4.5.3: Demographics and psychographics of international and domestic visitors 2010
Source: Ministry of Tourism (2010a)

The top four visitor markets were Australia (303,211), the UK (177,981), the USA (82,399) and Germany (92,830) (Ministry of Economic Development, 2010). In June 2010, international visitors represented 33% of all visitor nights in the Nelson Tasman RTO and 34.7% in the Marlborough RTO. Compared to June 2009, international visitor nights increased by 6.6% to 13,375 whereas domestic visitor nights declined by 12.9% to 27,174 in Nelson Tasman in the same time period. In Marlborough domestic visitor nights rose by

4.8% to 19,147 and international visitor nights declined by 3.2% to 10,166 (Figures 4.5.1 and 4.5.2) (Statistics New Zealand, 2010a, 2010b).

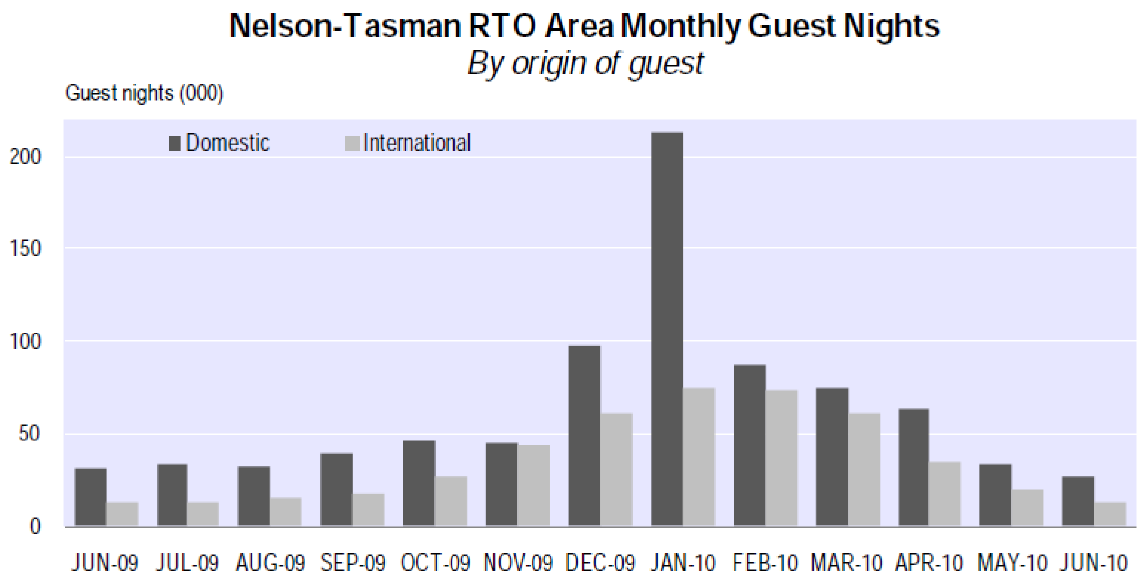

Figure 4.5.1: Nelson-Tasman RTO Area Monthly Guest Nights
Source: Statistics New Zealand (2010b)

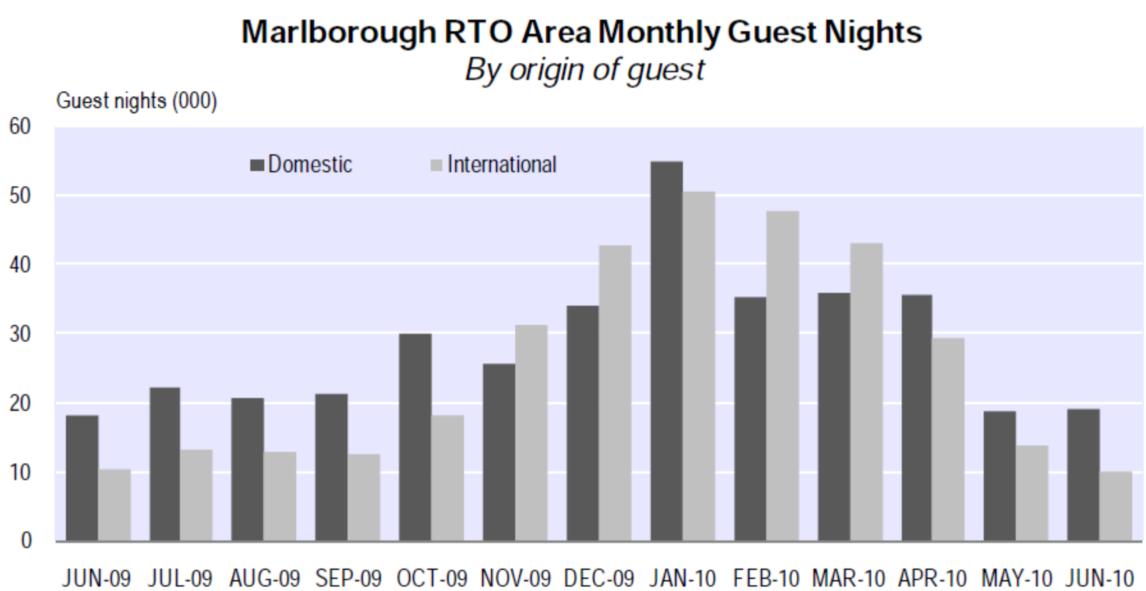

Figure 4.5.2: Marlborough RTO Area Monthly Guest Nights
Source: Statistics New Zealand (2010a)

According to a tourism sector profile by the Ministry of Tourism (2009a, 2009b), the Nelson/Marlborough and Golden Bay region attracts international wine tourists and visitors from overseas with a high propensity to participate in nature-based tourism. A wine tourist is defined as an "international and domestic visitor, aged 15 years and over, who visits a winery at least once while travelling in New Zealand. Local residents visiting a winery within their area are not included in this definition" (Ministry of Tourism, 2009a, p. 1). In 2008, 195,100 visitors generated 177,700 international trips and 297,500 domestic trips to wineries in New Zealand. The most popular region for international wine tourists to visit was Marlborough, which received 45,000 visitors wanting to experience the local wines. International visitors, especially tourists from the USA and the UK, are more likely to visit wineries than domestic visitors (Ministry of Tourism, 2009b). Furthermore, these international wine tourists involved themselves in activities related to local food and beverages as well as arts and culture. They visited food and wine festivals, and showed interest in cultural events (Ministry of Tourism, 2009a).

There is no contemporary information about food tourists or tourists interested in seafood related experiences in New Zealand. However, activities like 'scenic boat cruises' and 'fishing' attract high numbers of international and domestic tourists (Ministry of Tourism, 2009b).

4.6 SUMMARY

This chapter has given in-depth insight into the case study site and the 'Top of the South Aquaculture and Seafood Trail'. The secondary review of data has helped to explain how social, cultural, environmental and political conditions have shaped the region as a tourist destination. By comparing tourism and seafood/aquaculture, it becomes clear that both industries are vital to the region's economy. The tourism and seafood sectors are well established in the case study site. Evaluation of the tourism sector has demonstrated the ongoing development of the destination as a region specialising in gourmet and food tourism experiences organised around local produce. This growth offers significant potential for further integration of tourism and the local seafood/aquaculture sectors.

An integral part of assessing the region as a tourist destination is also to understand the visitor profile that is attracted to the area in terms of demographics and psychographics.

5 Research Results

This chapter lists the results from the questionnaires. The results are arranged in written, tabular (highest value highlighted respectively or arranged in descending order) and graphic form. Its purpose is to create a foundation for the subsequent discussion chapter. Overall, 45 questionnaires were conducted at the i-SITE centre in Nelson, a further 29 at the tourism operator 'Cougar Line' in Picton, 15 at the i-SITE in Picton and 11 at the i-SITE in Blenheim.

Although 100 people participated in the survey, not every one of them answered each question, resulting in different 'N' within the range of questions. 'N' represents the number of respondents having answered the respective question.

Results are organised by displaying the valid 'N', frequencies, and their allocated percentages. The results of the Likert scales are set up in tables demonstrating highest to lowest mean in descending order. Answers to the open-ended questions are clustered and arranged in tables.

Results are displayed in line with the research objectives. Respondents have expressed their attitudes and expectations towards seafood and tourism in the Nelson/Marlborough and Golden Bay region and according to their demographic and psychographic characteristics a visitor profile could be established. Visitors' level of interest and their demand for a holiday-related seafood experience is illustrated and their perception of promotion and disadvantages of a 'seafood destination' is stated.

5.1 Seafood and Tourism in the Nelson/Marlborough and Golden Bay Region

Visitors were asked about their opinions towards the promotion of the Nelson/Marlborough and Golden Bay region as a "seafood destination". "Seafood destination" is defined as a destination that is renowned for its local seafood, aquaculture, and activities related to the marine farming environment.

In terms of background information about seafood in the region, it was found that only 17.2% of visitors know that the region is the largest seafood producing area in New Zealand (Table 5.1.1).

Are you aware that the Nelson/Marlborough and Golden Bay Region is the largest seafood producing area in New Zealand? (N=99)

Table 5.1.1: Knowledge about largest seafood producing region

Awareness of Largest Seafood Producer	Frequency	Percentage %
Yes	17	17.2
No	82	82.8

The majority of 79.8% percent thought it was an important fact to know when travelling to the region (Table 5.1.2).

Do you think it is important to know when travelling to the region? (N=99)

Table 5.1.2: Importance of largest seafood producing area

Is it important to know about the region being the largest seafood producer?	Frequency	Percentage %
Yes	79	79.8
No	20	20.2

Out of the 17 respondents who affirmed that they knew about the region being the largest seafood producing area, the majority of people (47.1%) learned about that fact from experience and recommendations from friends and relatives (29.4%) (Table 5.1.3).

If yes, how did you learn about the region? (N=17)

Table 5.1.3: How did you learn about the region?

How did you learn about the region?	Frequency	Percentage %
Experience	8	47.1
Recommendations	5	29.4
Magazines / newspaper	4	23.5
Internet	4	23.5
Radio / TV	1	5.9
Promotional material	0	0.0

As multiple answers were possible, the percentage adds up to more than 100%.

In contrast to that finding, Table 5.1.4 displays that the majority of visitors (88.9%) are convinced that knowing about this regional asset would attract more visitors to the Nelson/Marlborough and Golden Bay region.

Do you think being aware of this fact would attract more visitors to the region? (N=99)

Table 5.1.4: Knowing about the region's asset attracts more visitors

Attract more Visitors to the Region	Frequency	Percentage %
Yes	88	88.9
No	11	11.1

As well as visitors' beliefs about the above fact, results show that they see potential for a "seafood destination" in the Top of the South.

Answers put forward indicate visitors' perceptions of attributes which a "seafood destination" should have. In general 74.7% of all respondents feel that the region offers potential as a "seafood destination" as opposed to 6.9% who do not think there is any potential and 18.4% who do not know if there is potential. Table 5.1.5 displays that 32.2% of respondents associate the "region is on the coast" with its potential as a "seafood destination". Respondents believe it to be the most significant potential indicator for a "seafood destination", along with the existence of an 'aquaculture industry' (17.2%), 'good seafood' (13.8%), and the 'abundance of seafood' (13.8%).

Do you feel that the Nelson/Marlborough and Golden Bay region offers potential as a "seafood destination" and if so, why? (N=87)

Table 5.1.5: Indicators for a "seafood destination"

Attribute of a 'Seafood Destination'	Frequency	Percentage %
No	6	6.9
Don't know	16	18.4
Yes	65	74.7
Region is on the coast	28	32.2
Aquaculture industry	15	17.2
Good seafood	12	13.8
Abundance of seafood	12	13.8
A lot of tourist activities	9	10.3
Many tourists	9	10.3
Clean unpolluted water	8	9.2
Havelock mussels	7	8.1
Good weather	6	6.9
Good match with wine region	3	3.5
Harbor	2	2.3
Local province/community	2	2.3
Trail opportunity	1	1.2

As multiple answers were possible, the percentage adds up to more than 100%.

Visitors identify the main advantage of developing the region into a "seafood destination" as 'more tourists would be attracted' to the region (41.6%). In addition, increasing tourism would 'affect the economy in a positive way' and would help to 'create jobs' in the region (19.5%). Furthermore the 'creation of a brand' for the region (14.3%) and the region being 'already a tourist destination' (14.3%) are also considered important advantages. Thirteen percent of respondents felt that 'value/opportunities would be added' to the destination as a result of developing the area as a "seafood destination" (Table 5.1.6).

What are the strengths/advantages of developing the region into a "seafood destination"? (N=77)

Table 5.1.6: Advantages for the development of a "seafood destination"

Strength/Advantage	Frequency	Percentage %
Attracts more tourists	32	41.6
Economy stimulation/job creation	15	19.5
Regional reputation/brand creation	11	14.3
Well established tourist destination	11	14.3
Added value/opportunities	10	13.0
Chance to taste fresh seafood	9	11.7
Supports sustainable management	6	7.8
Don't know	5	6.5
Good match with wine	4	5.2
Close to the water	4	5.2
Integration aquaculture & tourism	4	5.2
Most people like seafood	3	3.9
Overall importance of the sea	2	2.6
Good weather	2	2.6
Good infrastructure	1	1.3
Opportunity for trail	1	1.3
Abundance of seafood supplies	1	1.3
Rural appeal	1	1.3

As multiple answers were possible, the percentage adds up to more than 100%.

Regarding the culinary tourism aspect, visitors were asked how many times they had eaten seafood while visiting the region. Visitors who had just arrived or had not eaten seafood by that time are not included in ‘N’. Respondents took advantage of the availability of fresh locally harvested seafood because on average every visitor had seafood 1.12 times, one person had eaten seafood ten times while he/she was visiting and six people had not eaten seafood at all (Table 5.1.7).

How many times did you eat seafood while visiting the region? (N=41)

Table 5.1.7: Times of visitors’ consumption of locally harvested seafood

Times Visitors ate Seafood	# of Visitors	Percentage %
0	6	14.6
1	11	26.8
2	5	12.2
3	2	4.9
4	7	17.2
5	4	9.8
6	3	7.3
7	1	2.4
9	1	2.4
10	1	2.4

5.2 Characteristics of Visitors to the Nelson/Marlborough and Golden Bay Region

To understand what kind of visitors come to the region, a profile, presenting a 'snapshot in time' has been deduced from the findings displayed in this section. The following demographic data categorises visitors' characteristics. According to the recent study, the majority of visitors to the Top of the South, are female (56%) (Chart 5.2.1).

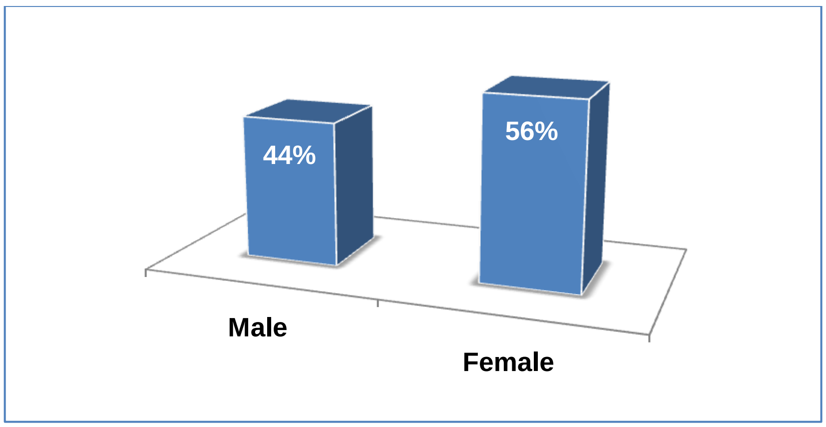

Chart 5.2.1: Gender (N=98)

The prevalent age group is 20 to 29 years (38.1%), closely followed by the 30 to 39 year old (24.7%) (Chart 5.2.2).

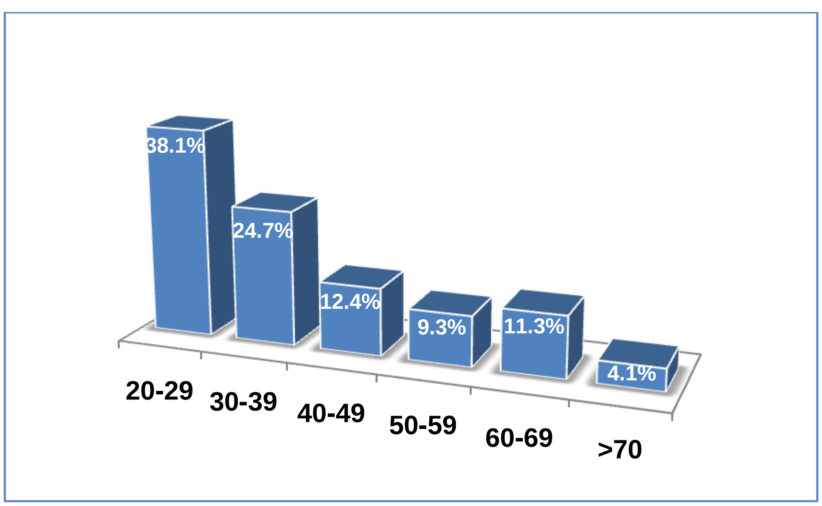

Chart 5.2.2: Age groups (N=97)

In total 70.5% of all respondents have completed a tertiary education which include either a 'University Diploma or Certificate' (55.8%), a 'University Degree' (10.5%), or a 'Polytechnic Diploma or Certificate' (4.2%) (Chart 5.2.3).

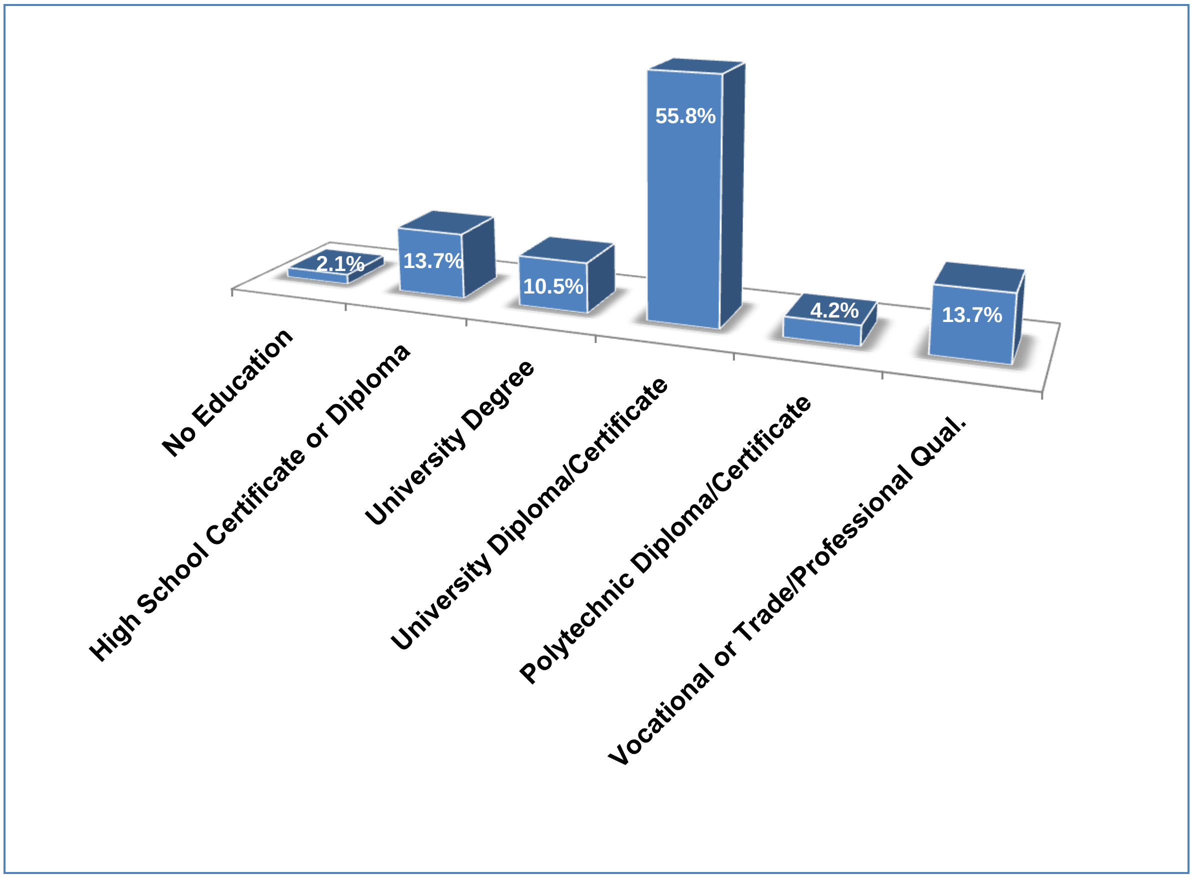

Chart 5.2.3: Level of education (N=95)

According to respondents (Chart 5.2.4), they are mainly 'employed full time' (49.4%) opposed to 13.5% of unemployed respondents. A further 8.2% mentioned under 'other' that they are self-employed or travelling.

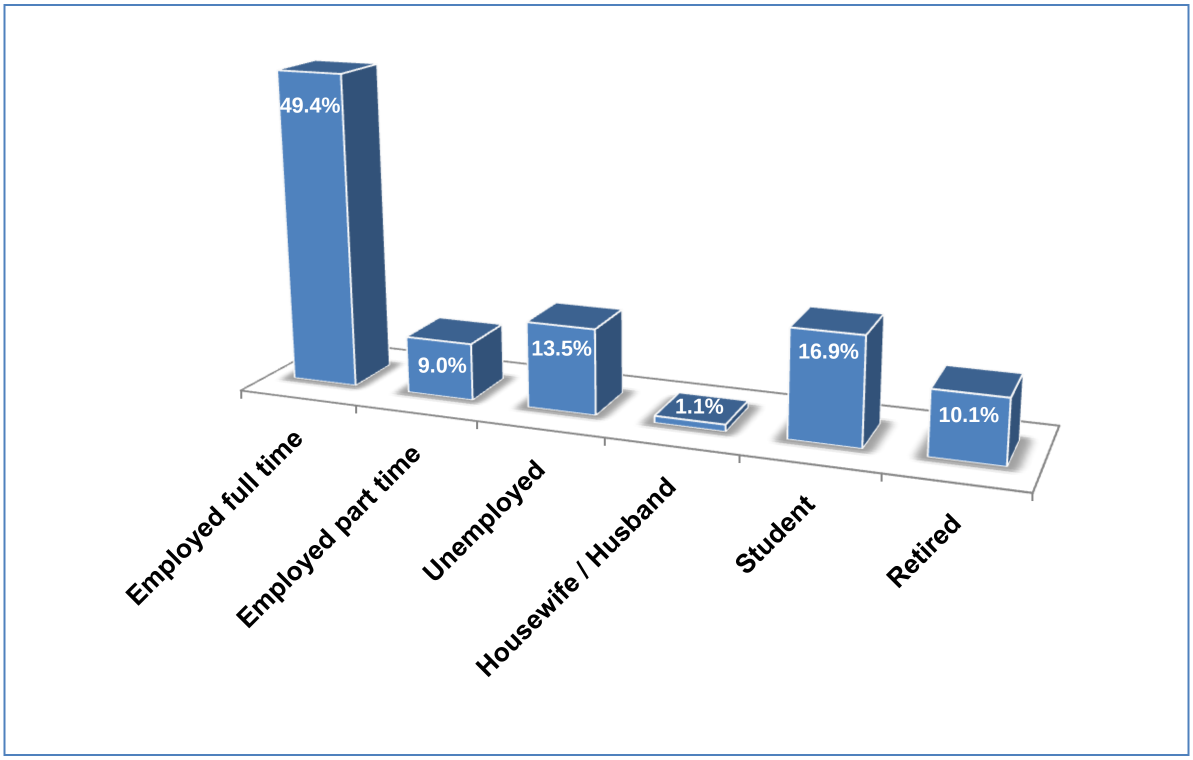

Chart 5.2.4: Employment status (N=89)

20.5% of the visitors indicated a household income of under NZ$20,000 due to the fact that many of them are backpackers and/or working and travelling, who in most cases travel longer than one month. Nevertheless, 39.7% of respondents have an income between NZ $40,000 and NZ $99,999 (Chart 5.2.5).

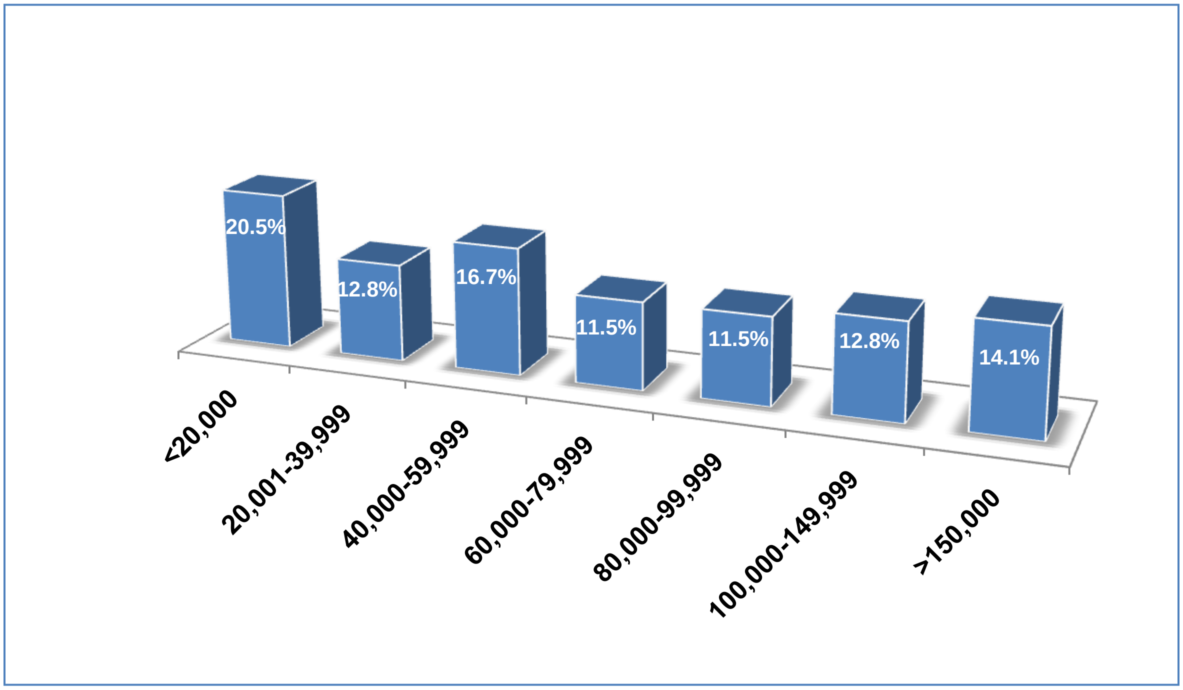

Chart 5.2.5: Household income in NZD (N=78)

Pie Chart 5.2.6 shows that approximately one third of all visitors are domestic travellers (30%), 43% originate from Europe, 17% are Australian residents and 10% were from North America (USA and Canada).

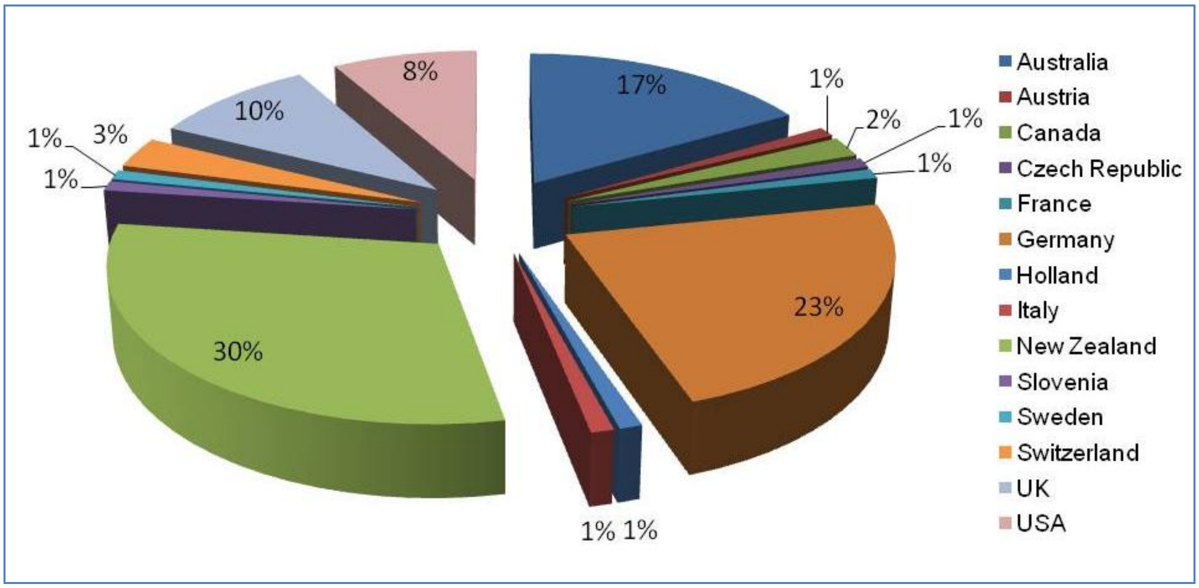

Chart 5.2.6: Country of origin (N=97)

To take into account visitors' psychographic data, such as travel behaviour in the region and preferences regarding eating and purchasing locally harvested seafood, helps to complete the profile of visitors to the case study site.

As shown in Table 5.2.1, for 70% of the participants it was the first trip in the last two years to the Nelson/Marlborough and Golden Bay region. Still, nearly one third (27%) said they have been to the region 2-5 times.

How many times have you visited the Nelson/Marlborough and Golden Bay Region? (N=100)

Table 5.2. 1: Frequency of most recent visit to the region

Times of Visits	Frequency	Percentage %
First trip	70	70.0
2-5 times	27	27.0
6-10 times	1	1.0
>10 times	2	2.0

According to Table 5.2.2, the majority of visitors (30%) stayed 4-7 nights in the region, followed by 28% who stayed 2-3 nights. Sixteen percent of the visitors stayed longer than 14 nights, 13% still spent 8-14 nights in the area and another 13% went there on a day trip or stayed for one night.

Which of the following best describes the duration of your most recent trip to the Nelson/Marlborough and Golden Bay Region? (N=100)

Table 5.2.2: Duration of most recent trip

Duration	Frequency	Percentage %
Day trip / No overnight	5	5.0
1 night	8	8.0
2-3 nights	28	28.0
4-7 nights	30	30.0
8-14 nights	13	13.0
>14 nights	16	16.0

Table 5.2.3 demonstrates that for most of the visitors the main purpose of the recent trip to the Nelson/Marlborough and Golden Bay region was 'vacation / leisure' (83%) followed by visiting friends and relatives (VFR) (13%). Within the 'other' option, two of the nine participants said their main purpose of the trip was 'wwoofing' (willing workers of organic farms) and another two of those nine identified 'tramping' as their main purpose of travelling.

What was the purpose of your most recent trip to the Nelson/Marlborough and Golden Bay Region? (N=100)

Table 5.2. 3: Main purposes of recent visit

Purpose	Frequency	Percentage %
Vacation / Leisure	83	83.0
VFR	13	13.0
Passing through	6	6.0
Second home	2	2.0
Business	2	2.0
Other	9	9.0

As multiple answers were possible, the percentage adds up to more than 100%.

Primary accommodations used are backpackers and hostels (38%) along with campgrounds (36%). Less than one quarter (16%) of visitors to the region stayed at hotels and/or motels (Table 5.2.4). Within the mentions of 'other', eight respondents pointed out that they spent the night in a campervan which does not necessarily imply that they stayed at a campground.

What type of accommodation did you use on your most recent trip to the Nelson/Marlborough and Golden Bay region? (N=100)

Table 5.2.4: Preferred type of accommodation

Accommodation	Frequency	Percentage %
Backpacker / Hostel	38	38.0
Campground	36	36.0
Hotel / Motel	16	16.0
Friends' home	12	12.0
DOC Hut	9	9.0
Bed & Breakfast	6	6.0
Bach / Cottage	5	5.0
Lodge / Inn	3	3.0
Other	16	16.0

As multiple answers were possible, the percentage adds up to more than 100%.

Forty four percent of travellers were accompanied by their partners but many people (27%) travelled by themselves or with friends (23%) (Table 5.2.5). The option 'other' was not chosen by any of the participants.

Whom did you travel with on your most recent trip to the Nelson/Marlborough and Golden Bay region? (N=100)

Table 5.2.5: Travel companion on recent trip

Mode of Travel	Frequency	Percentage %
Partner	44	44.0
Alone	27	27.0
Friends	23	23.0
Family incl. children	13	13.0
Relatives	1	1.0
Tour group	1	1.0
Business group	0	0.0

As multiple answers were possible, the percentage adds up to more than 100%.

Half of the participants travelled to the region by car (50%) whereas 21% arrived there by ferry and/or campervan and 19% took advantage of aeroplanes and buses respectively (Table 5.2.6). Recurrent 'other' statements were 'bicycle' (2) and 'hitch-hiking' (3).

How did you travel to the region? (N=100)

Table 5.2.6: Travel vehicle for recent visit

Travel Vehicle	Frequency	Percentage %
Car	50	50.0
Ferry	21	21.0
Campervan	21	21.0
Aeroplane	19	19.0
Bus	19	19.0
Train	3	3.0
Other	7	7.0

As multiple answers were possible, the percentage adds up to more than 100%.

The internet was used by 63% of travellers as the main information source for the planning of the trip to Nelson/Marlborough and Golden Bay. Guide books (57%) and i-SITE centres (51%) were also frequently consulted in terms of holiday planning (Table 5.2.7). Two out of six respondents who chose the 'other' option confirmed the usage of the DOC information centre service as a travel planning source.

When planning this trip, which of the following information sources did you use? (N=100)

Table 5.2.7: Information sources for travel planning

Information Sources	Frequency	Percentage %
Internet	63	63.0
Guide book	57	57.0
i-SITE centre	51	51.0
Recommendations	42	42.0
Experience	24	24.0
Road signs	21	21.0
Local tour operator	6	6.0
Travel agency	5	5.0
Other	6	6.0

As multiple answers were possible, the percentage adds up to more than 100%.

In total, survey participants nominated 163 entries as reasons for travelling to the Top of the South. The three most frequently named reasons to visit the region were the 'scenery' (27.1%), 'passing through' (25.4%), and the renowned 'wine' area (23.7%) and 'travelling' in general (23.7%). All outdoor activities ('Abel Tasman NP', 'sea kayaking', 'hiking/tramping', 'beaches', 'scenery', 'nature', 'wildlife', 'Queen Charlotte Track', 'cycling', 'Marlborough Sounds', 'adventure', and 'Farewell Spit') together total 44.2% (72 entries) which indicates the emphasis on active outdoor holidays in the region. 'Hiking/tramping/walking' including entries of 'Abel Tasman NP' and 'Queen Charlotte Track' totals 17.1% (28 entries) (Table 5.2.8).

Please name three important reasons why you travelled to the Nelson/Marlborough and Golden Bay Region. (N=59)

Table 5.2.8: Reasons for visiting the Nelson/Marlborough and Golden Bay region

Travel Reasons	Frequency	Percentage %
Scenery	16	27.1
Passing through	15	25.4
Travelling	14	23.7
Wine	14	23.7
Good weather	11	18.6
Abel Tasman National Park	10	16.9
Queen Charlotte Track	10	16.9
Hiking / Tramping / Walking	8	13.6
Nature	7	11.9
VFR	7	11.9
Fisheries	5	8.5
Never been here before	4	6.8
Beaches	4	6.8
Recommendations	4	6.8
Work	4	6.8
Cycling	4	6.8
Sightseeing	4	6.8
Sea kayaking	3	5.1
Wildlife	3	5.1
Marlborough Sounds	3	5.1
Visit Nelson	2	3.4
Adventure	2	3.4
Easy access	2	3.4
Farewell Spit	2	3.4
Fun	1	1.7
Wedding	1	1.7
Conference	1	1.7
Food & beverage	1	1.7
Art	1	1.7

As multiple answers were possible, the percentage adds up to more than 100%.

The majority of visitors like the taste of seafood. Out of 100 respondents, 91% confirmed that they eat seafood (Table 5.2.9).

Do you eat seafood? (N=100)

Table 5.2.9: Propensity to eat seafood

Seafood Eater	Frequency	Percentage %
Yes	91	91.0
No	9	9.0

Saltwater fish is preferred by most of the participants (97.8%) followed by freshwater fish (85.7%) and shellfish (76.9%). Oysters are liked the least (44%) (Table 5.2.10).

If your answer is yes, which of the following types do you eat? (N=91)

Table 5.2.10: Type of seafood

Seafood Type	Frequency	Percentage %
Saltwater fish	89	97.8
Freshwater fish	78	85.7
Shellfish	70	76.9
Mussels	65	71.4
Oysters	40	44.0
Other	12	13.2

As multiple answers were possible, the percentage adds up to more than 100%.

More than one third (36.2%) of the respondents eat seafood once a week when at home and 23.4% have seafood several times a week (Table 5.2.11).

How frequently do you eat seafood (incl. mussels) at home? (N=94)

Table 5.2.11: Frequency of eating seafood at home

Occurrence of Eating Seafood at Home	Frequency	Percentage %
Once a week	34	36.2
Several times a week	22	23.4
Once a month	22	23.4
Once every two weeks	16	17.0
Once a day	0	0.0

Most of the respondents (83.2%) confirmed that their preferred kind of packaging was fresh seafood (Table 5.2.12). Twenty-two percent of respondents indicated that they would prefer purchasing seafood that was packaged as ready to eat/cook. The least appealing packaging is frozen (10.5%).

What kind of packaging do you prefer when buying seafood while visiting the coast? (N=95)

Table 5.2.12: Preferred kind of seafood packaging

Packaging	Frequency	Percentage %
Fresh	79	83.2
Ready to eat/cook	22	23.2
Frozen	10	10.5

As multiple answers were possible, the percentage adds up to more than 100%.

Out of 100 respondents, 29 acknowledged that they purchased locally harvested seafood to take home, prepare and consume (Table 5.2.13).

Did you purchase locally harvested seafood to process yourself during your trip? (N=100)

Table 5.2.13: Purchase of locally harvested seafood to process

Purchase of Local Seafood	Frequency	Percentage %
Yes	29	29.0
No	71	71.0

A further 72.4% of the 29 respondents who responded positively to the first part of the question thought that it was easy to access and purchase locally harvested seafood to consume at home, as opposed to 27.6% who did not think that it was easy to find locally harvested seafood to purchase and process at home (Table 5.2.14).

If your answer is yes, did you find it easy to access locally harvested seafood? (N=29)

Table 5.2.14: Access to locally harvested seafood

Easy Access to Local Seafood	Frequency	Percentage %
Yes	21	72.4
No	8	27.6

In the third part of the question, these 29 people were asked to state where they bought their seafood. Because this was an open-ended question, people gave overlapping answers in different contexts. 'Restaurant' (5), 'hotel' (2), 'locally / self caught' (2), 'café' (1), 'Greytown' (1) and 'north of Haast' (1) were excluded as the seafood was neither purchased to be processed by the visitors nor was it purchased in the research area. Table 5.2.15 below shows purchasing locations in descending order:

Where did you buy the seafood? (N=29)

Table 5.2.15: Seafood purchase location

Purchase Location	Frequency
Supermarkets	13
Farmers and public markets	5
Nelson waterfront	4
(Fish) shops	4
Havelock	3
Kaikoura roadside	2
Just arrived / not yet purchased	2

On a Likert Scale ranging from 1 (not at all important) to 7 (extremely important), the stated means indicate respondents' rated level of importance of the statement. The most important attribute in the selection of seafood is 'freshness' (mean 6.69). The second most important feature is 'health safety', meaning the seafood is free of additives, with a mean of 6.34. Third is that the seafood was 'harvested in an environmentally sustainable manner' with a mean of 5.8 (Table 5.2.16).

Which of the following factors might be important to your selection of seafood while visiting the Nelson/Marlborough and Golden Bay region?

Table 5.2.16: Importance of selection of seafood

Attribute of Selection	N	Mean
When seafood was caught (Freshness)	93	6.69
Health safety (no additives, e.g. antibiotics)	91	6.34
Harvest was environmentally sustainable	90	5.80
Price	91	5.40
Where seafood was caught (Origin)	92	5.12
Reputation	92	5.01
Government / Industry inspected	91	4.99

1=not at all important 2=slightly important 3=somewhat important 4=moderately important 5=important 6=very important 7=extremely important

5.3 Visitors' Attitudes, Beliefs and Expectations, and Interest towards the Seafood Experience

Most visitors (56.5%) did not think that the Nelson/Marlborough and Golden Bay region was lacking specific attributes associated with a "seafood destination", although 8.6% did not even think about seafood when they arrived in the region. Six percent were not sure and 29% stated that they missed particular characteristics that distinguish a "seafood destination". Respondents most frequently mentioned that the region was not advertised as being famous for its seafood (35%). They identified a lack of 'fish/local markets' (25%), and 'fish shops' (25%), and 'easily accessible fresh seafood' (20%). Also, 'information on where to purchase locally harvested seafood' (20%) was hard to find (Table 5.3.1).

Did you miss anything when thinking about a "seafood destination" on your trip to the Nelson/Marlborough and Golden Bay region? (N=69)

Table 5.3. 1: Lack of attributes for a "seafood destination"

Lacking Feature	Frequency	Percentage %
No lacking feature	39	56.5
Did not think about seafood	6	8.6
Don't know	4	6.0
Yes, lacking features	20	29.0
Advertising	7	35.0
Fish/local market	5	25.0
Fish shops	5	25.0
Information where to buy seafood	4	20.0
Easily accessible fresh seafood	4	20.0
Seafood restaurants	3	15.0
"Seafood destination" branding	2	10.0
Education on sustainable fisheries	1	5.0

As multiple answers were possible, the percentage adds up to more than 100%.

When visitors were asked how they would improve accessibility of locally harvested seafood to potential consumers, 27.4% suggested to sell it via 'fish shops and roadside stands', at 'dockside stands and fishing boats' (19.2%) and at 'fish or local markets' (19.2%). Suggestions of the increased need for 'advertising' (13.7%) and for selling seafood at the 'local supermarket' (13.7%) were among the most frequent responses (Table 5.3.2).

What are your suggestions to make locally harvested seafood easily accessible? (N=73)

Table 5.3.2: Suggestions to improve access to locally harvested seafood

Access	Frequency	Percentage %
Fish shops/roadside stands	20	27.4
Fish/local market	14	19.2
Dockside stand/fishing boats	14	19.2
Supermarket	10	13.7
Advertising	10	13.7
Don't know	6	8.7
Seafood restaurants	5	6.8
Offer seafood below average price	4	5.5
Seafood related activities	3	4.1
Signage	3	4.1
Information where to buy seafood	3	4.1
Cooperation between businesses	3	4.1
Festivals	2	2.7
Information how to process	2	2.7
Aquaculture farm selling point	1	1.4
Foster sustainable aquaculture	1	1.4

As multiple answers were possible, the percentage adds up to more than 100%.

Respondents identified that they would like to purchase locally harvested seafood mainly at places where fresh fish can be obtained (Table 5.3.3) e.g. at a 'fish market' (66.7%). Other high ranking opportunities to buy seafood are 'seafood stores' (56.3%), 'public markets' (41.7%), 'dockside stands and fishing boats' (37.5%).

At what locations would you like to purchase seafood while visiting the Nelson/Marlborough and Golden Bay region? (N=96)

Table 5.3.3: Seafood purchasing locations

Purchasing Location	Frequency	Percentage %
Fish market	64	66.7
Seafood store	54	56.3
Public market	40	41.7
Fishing boat	36	37.5
Dockside stand/vendor	36	37.5
High quality restaurant	32	33.3
Aquaculture / Seafood farm	28	29.2
Festivals / Fairs	23	23.9
Diner / Café	23	23.9
Grocery store	20	20.8
Seafood chain restaurant	19	19.8
Seafood processor	7	7.3
Internet	2	2.1
Other	3	3.1

As multiple answers were possible, the percentage adds up to more than 100%.

Another 65 respondents indicated that they would purchase seafood at 'local restaurants known for regional dishes' (60%), 'waterfront restaurants' (58.5%), and 'roadside stands' (23.1%) (Table 5.3.4).

At what locations would you like to purchase seafood while visiting the Nelson/Marlborough and Golden Bay Region? (N=65)

Table 5.3.4: Seafood purchasing locations cont.

Purchasing Location cont.	Frequency	Percentage %
Local restaurants known for dishes	39	60.0
Waterfront restaurant	38	58.5
Roadside stand	15	23.1

As multiple answers were possible, the percentage adds up to more than 100%.

The Likert scale for the following question ranges from 1 (strongly disagree) to 7 (strongly agree) and represents the preferences regarding eating seafood of visitors to the Nelson/Marlborough and Golden Bay region. Strongest agreement indicated by the highest mean of 5.77 is related to 'I prefer to eat locally harvested seafood on the coast' and 'I am looking for healthy seafood'. Visitors somewhat agree to the preference 'I believe in supporting restaurants that serve locally harvested seafood' (mean 5.57). Agreement towards the remaining statements becomes weaker and respondents are almost neutral (mean 4.37) about 'I order seafood specialties whenever I dine out' (Table 5.3.5).

Which of the following statements best reflect your preferences regarding eating seafood while visiting the Nelson/Marlborough and Golden Bay region?

Table 5.3.5: Preferences regarding eating seafood

Preference	N	Mean
I prefer to eat locally harvested seafood on the coast	91	5.77
I am looking for healthy seafood	90	5.77
I believe in supporting restaurants that serve locally harvested seafood	91	5.57
I look for opportunities to eat seafood where I can see water	91	5.02
I am willing to pay more for locally harvested fresh seafood	92	5.00
I order seafood whenever I dine out	90	4.37

1=strongly disagree 2=disagree 3=somewhat disagree 4=neutral 5=somewhat agree 6=agree 7=strongly agree

Respondents believe that ‘coastal restaurants should support local seafood harvesters’ (Table 5.3.6). Their agreement to that expectation peaks at a mean of 6.36 on the 7-point Likert Scale. The next top three beliefs of respondents are ‘seafood is fresher if I purchase it on the coast’ (mean 5.65), ‘I like the atmosphere of the seafood harvesting ports’ (mean 5.61), and ‘seafood purchased on the coast tastes better than purchased at home’ (mean 5.28). Respondents also indicated that they do not necessarily ‘think of seafood when they think of the region’ (mean of 3.76).

Which of the following statements best reflect your beliefs and expectations regarding seafood while visiting the Nelson/Marlborough and Golden Bay region?

Table 5.3.6: Beliefs and expectations regarding seafood

Belief / Expectation	N	Mean
Coastal restaurants should support local seafood harvesters	91	6.36
Seafood is fresher if I purchase it on the coast	91	5.65
I like the atmosphere of the seafood harvesting ports	90	5.61
Seafood purchased on the coast tastes better than purchased at home	90	5.28
Seafood is cheaper if I purchase it on the coast	90	5.01
Seafood served at most coastal restaurants are typically locally harvested ones	90	4.99
Seafood is healthier if I purchase it on the coast	90	4.84
Seafood is safer if I purchase it on the coast	90	4.72
When I think of the region I think of seafood	90	3.76

1=strongly disagree 2=disagree 3=somewhat disagree 4=neutral 5=somewhat agree 6=agree 7=strongly agree

Table 5.3.7 shows that in total, 41.8% of respondents did some kind of planning related to seafood in advance of their trip. Twenty-four participants (26.4%) of the survey 'planned to purchase locally harvested seafood' on their travel to the Nelson/Marlborough and Golden Bay region. Another 15.4% 'looked for information about seafood restaurants' in the region.

Which of the following statements reflect your experiences purchasing and consuming seafood in relation to your visit to the Nelson/Marlborough and Golden Bay region? (N=91)

Table 5.3.7: Travel planning at home

Planning	Frequency	Percentage %
I planned to purchase locally harvested seafood in the region	24	26.4
I looked for information about seafood restaurants serving local seafood	14	15.4
Eating locally harvested seafood Was the primary reason for the trip	0	0.0

A slightly higher percentage (62.7%) planned seafood related activities while they were travelling through the region; 34.1% 'purchased seafood from sites along the way' and 17.6% 'asked residents about purchase locations for local seafood' (Table 5.3.8).

Which of the following statements reflect your experiences purchasing and consuming seafood in relation to your visit to the Nelson/Marlborough and Golden Bay region? (N=91)

Table 5.3.8: Travel planning en route

Planning	Frequency	Percentage %
I purchased seafood from sites along the way	31	34.1
I asked locals about purchase locations for local seafood	16	17.6
I picked up information on seafood availability from an i-SITE center	10	11.0

As part of the recollection of their trips to the top of the South Island, 20.9% of the visitors are 'planning to return to the region to eat local seafood' and 17.6% indicated that 'eating seafood was an important part of their travel activities'. Furthermore, according to Table 5.3.9, 15.4% of the respondents have already 'recommended the region as a destination to eat seafood'.

Which of the following statements reflect your experiences purchasing and consuming seafood in relation to your visit to the Nelson/Marlborough and Golden Bay region? (N=91)

Table 5.3.9: Travel recollection

Recollection	Frequency	Percentage %
I am planning to return to eat seafood	19	20.9
Eating seafood was an important part of travel activities	16	17.6
I have recommended the region to eat seafood	14	15.4

By examining Table 5.3.10 it becomes clear that means indicating interest related to aquaculture and marine farming activities such as ‘going on a commercial fishing trawler’ (mean 3.65) or ‘going on a charter boat to catch fish’ (mean 4.1), ‘learning about aquaculture from a marine farmer’ (mean 4.03), ‘having a travel guide that indicates where to see harvesting boats’ (mean 4.2), or ‘viewing fishing boats’ (mean 4.33), are relatively low. These means are grouped around four on a 7-point Likert scale which signifies people being neutral about the topic. However, respondents indicate that they are interested in ‘eating seafood cooked in local recipes’ (mean 5.47), ‘eating fresh seafood at local festivals’ (mean 5.44), ‘learning from a chef how to cook seafood’, and ‘having a travel guide that indicates purchase locations’ (mean 4.75).

How do the following statements reflect your interest in seafood and marine aquaculture related opportunities associated to your visit to the Nelson/Marlborough and Golden Bay region?

Table 5.3.10: Interest in seafood related activities

Interest	N	Mean
Eat seafood cooked in local recipes	89	5.47
Eat fresh seafood at local festivals	89	5.44
Learn from a chef how to cook seafood	88	4.83
Have a travel guide indicating purchase locations	85	4.75
Bring home harvested seafood	89	4.58
Learn more about local seafood / aquaculture heritage	87	4.49
View fishing boats while visiting	87	4.33
Have a travel guide indicating where to see harvesting boats	87	4.20
Go on a charter boat to catch fish	87	4.10
Learn about aquaculture from a marine farmer	86	4.03
Go on a commercial fishing trawler	86	3.65

1=strongly disagree 2=disagree 3=somewhat disagree 4=neutral 5=somewhat agree 6=agree 7=strongly agree

When participants were asked what they would like to learn more about, their interests included ‘sustainability issues related to aquaculture’ (mean 5.23), the ‘nutritional benefits of farmed seafood’ (mean 5.13) and the ‘safety of aquaculture seafood’ (mean 5.02) as shown in Table 5.3.11. Visitors indicated neutral attitudes towards ‘aquaculture history’ (mean 4.57) and showed modest interest in learning about ‘aquaculture fishing methods’ (mean 3.86).

I would like to learn more about…

Table 5.3.11: Educational interests in aquaculture/marine farming

I would like to learn more about…	N	Mean
…sustainability issues related to aquaculture	60	5.23
…nutritional benefits of farmed seafood	61	5.13
…safety of aquaculture seafood	60	5.02
…aquaculture history	60	4.57
…aquaculture fishing methods	59	3.86

1=strongly disagree 2=disagree 3=somewhat disagree 4=neutral 5=somewhat agree 6=agree 7=strongly agree

5.4 Innovative and Sustainable Tourism Development in the Nelson/ Marlborough and Golden Bay Region

In terms of promoting the region, the need for more 'advertising' (31.6%) was most frequently suggested by participants. Table 5.4.1 also shows that to 'offer walks/tours related to seafood' (26.3%) contributes a major percentage to visitors' ideas of promoting the region. Emphasis on sustainability and education (14.5%) was the third highest response category.

What would you do to promote the areas as a "seafood destination"? (N=76)

Table 5.4.1: Possible promotion of the region as a "seafood destination"

Promotion	Frequency	Percentage %
Advertising	24	31.6
Offer seafood related walks/tours	20	26.3
More education/sustainability	11	14.5
Festivals	10	13.2
Offer seafood tastings	9	11.9
More seafood restaurants/shops	9	11.9
Promotion of local produce	6	7.9
Promotion through restaurants	6	7.9
Match with vineyards	4	5.3
Create a regional brand	4	5.3
Promotion through tourist info	4	5.3
Don't know	3	3.9
Emphasis on fishing	3	3.9
Fish/local markets	3	3.9
Improve seafood quality	3	3.9
Opportunity to cook with chefs	3	3.9
Guide books	3	3.9
Travel, food & wine magazines	3	3.9
Promotion through backpackers	2	2.6
Signposting	2	2.6
Internet links	2	2.6
Promotion through fish shops	1	1.3
Promotion on-site at the harbour	1	1.3

As multiple answers were possible, the percentage adds up to more than 100%.

The majority (59.5%) of 79 respondents is concerned about turning the region into a "seafood destination" and identifies disadvantages related to that development whereas 34.2% do not think there are any disadvantages resulting from promoting a "seafood destination", and 6.3% do not know. In terms of disadvantages, the subject of 'negative environmental impacts' was mentioned by 21.5% of respondents as a concern, followed by uncertainty over the 'sustainability of aquaculture and tourism' (15.2%) and the concern of 'overfishing' (15.2%). Carrying capacity was also an important point, with respondents indicating that 'too many tourists' could be a risk to the region (12.7%) (Table 5.4.2).

Do you think there are any disadvantages of developing the Nelson/Marlborough and Golden Bay region into a "seafood destination"? If so, what would these be? (N=79)

Table 5.4.2: Disadvantages of the development of a "seafood destination"

Disadvantage	Frequency	Percentage %
No	27	34.2
Don't know	5	6.3
Yes	47	59.5
Negative environmental impact	17	21.5
Overfishing	12	15.2
Sustainability concerns	12	15.2
Too many tourists	10	12.7
Regional limitation to seafood	7	8.9
Impacts from aquaculture	5	6.3
Farms disturbing the views	4	5.1
Avoidance of region (fish dislike)	2	2.5
Competition/threat to Kaikoura	2	2.5
Exploitation of Sounds by farms	2	2.5
Seafood might be too expensive	1	1.3

As multiple answers were possible, the percentage adds up to more than 100%.

5.5 Summary

In summarising the current study results, the majority of visitors to the Nelson/Marlborough and Golden Bay region are between 20 and 29 years of age, a slightly higher percentage is female (56.1%) and an overall 70.5% have completed a tertiary education. Nearly half of all visitors (49.4%) are employed full time and their household income ranges between NZ$20,000 and NZ$60,000 or is set at NZ$100,000 and above. Thirty percent are domestic visitors, 23% come from Germany, 17% from Australia, followed by 10% from the UK and 8% from the USA.

According to the majority of responses, the main characteristics of visitors' most recent trip to the Nelson/Marlborough and Golden Bay region can be summarised as follows: for most of visitors it was the first trip to the region and they spent 4-7 nights travelling on vacation. They mainly stayed at backpackers and travelled with their partner independently by car to and around the region. The primary information source for their trip planning was the internet (Table 5.5.1).

Table 5.5.1: Overview of the top three characteristics of the recent trip

Ranking	Visits to the region	Duration of trip	Main purpose of trip	Type of Accommodation	Travel companion	Travel mode	Information Sources
Top 1	First trip 70%	4-7 nights 30%	Vacation / Leisure 83%	Backpacker / Hostel 38%	Partner 44%	Car 50%	Internet 63%
Top 2	2-5 times 27%	2-3 nights 28%	VFR 13%	Campground 36%	Alone 27%	Campervan and Ferry 21%	Guide Book 57%
Top 3	>10 times 2%	>14 nights 16%	Passing through 6%	Friends / Relatives / Vacation Home 12%	Friends 23%	Aeroplane and Bus 19%	i-SITE Centre 51%

The visitor to the Top of the South likes seafood and has consumed locally harvested seafood at least once while on holiday. He or she is health and safety conscious, they prefer to consume fresh seafood and seek opportunities to purchase it at authentic locations such as fish markets, dockside stands or at local (waterfront) restaurants. These visitors are highly concerned about sustainability issues around farmed seafood and believe in supporting local businesses. In general, these visitors' interest regarding seafood related activities focuses on experiences that involve its consumption rather than pursuing pure aquaculture or fishing opportunities. People who do eat seafood and people who do not eat seafood state the same level of interest in seafood/aquaculture related activities.

The profiled visitor to the Nelson/Marlborough and Golden Bay region does not travel solely for seafood. This is partly due to a lack of education about the regional assets and insufficient promotion or advertising of the region as a “seafood destination”. Nevertheless, the consumption of locally harvested seafood is an important part of their travel experience.

6 DISCUSSION OF THE RESEARCH FINDINGS

This chapter discusses the theoretical findings and field results analysing how perceptions and attitudes of visitors at the case study site compare with the perceptions of visitors at similar sites documented in the literature review. The chapter brings together the theoretical framework and research outcomes with an in-depth evaluation of visitors' expectations and attitudes towards seafood in the Nelson/Marlborough and Golden Bay region. The discussion of the findings will reveal the extent of existing visitor support for integrating the tourism and seafood sectors. The rationale behind this is that only if supply and demand is balanced, a sustainable market or tourism destination can be established and maintained (Gunn, 1997).

The first section in this chapter discusses the economic and socio-cultural importance of seafood and tourism to the Top of the South, and shows how the communities in this region benefit from these two sectors in terms of maintaining and improving the livelihood and well-being of their residents.

In the next section, visitors to the region are profiled and compared to the typical profile of visitors to New Zealand as well as to visitors to Australia's Seafood and Aquaculture Trail. Travel motivations are discussed as part of push and pull factors in tourism. The level of visitors' interest in seafood is distinguished and compared to Hall and Sharples' (2003) food tourism model in order to classify visitors to the Nelson/Marlborough and Golden Bay region.

Following this comparison, visitors' attitudes and expectations towards the integrated seafood experience are examined. These attitudes and expectations help evaluate whether visitors are ready and willing to participate in tourism opportunities of the TSAST and are also essential in determining customer satisfaction and possible repeat visits. Furthermore, the level of interest that visitors show towards activities related to seafood and aquaculture is determined and evaluated.

The last section discusses the benefits of themed trails that support sustainable destination management by way of explaining how visitors and community benefit from the innovative approach of integrating tourism and seafood/aquaculture. In this section the marketing of the seafood destination is examined to understand the importance of targeted strategies that support a strong brand for the region. These results show that the regional marketing strategies are acting as pull factors for the region and that in turn maximises revenue for tourism and aquaculture stakeholders participating in the seafood trail.

6.1 Seafood and Tourism in the Top of the South

The rapid increase in travel has resulted in significant economic impacts to tourism destinations globally. With 2.51 million international visitors in 2009 (Ministry of Tourism Research, 2010a), tourism has become New Zealand's largest export sector 'selling' its scenery, people and places, as well as its food and wine, as part of the overall experience (The Tourism Industry Association et al., 2007). The changes in demographics, technology, work-leisure balance and the shift towards customised tourism experiences have positively impacted the New Zealand tourism product. Visitors to New Zealand are more and more interested in travelling to rural regions like the Top of the South, resulting in increasing competition between these rural destinations (Echtner & Ritchie, 1991). International visitors spend an average length of 20.3 days in New Zealand (Tourism Strategy Group, 2010a). As most visitors tend to follow a circuit through New Zealand (Forer, 2005; Stuart, Pearce, & Weaver, 2005), they select the destinations that fit into their travel schedule. According to the Ministry of Economic Development (2010), 3,706,012 domestic and international visitors travelled to the Nelson/Marlborough and Golden Bay region in 2009. The economic importance of tourism to the region is reflected in annual visitor expenditures of NZ$566 million in 2009 (Ministry of Economic Development, 2010).

As was explained in Chapter Four, aquaculture is an economically significant industry in the Top of the South, producing 80% of all aquaculture exports of New Zealand (MFA, 2009a, 2009b). Aquaculture generated NZ$680 million for the local economy in 2009 and tourism contributed NZ$351 million. Economic data explains that the two sectors are among key economic drivers and GDP contributors in the Nelson/Marlborough and Golden Bay region. Employee numbers in aquaculture, fishing and seafood processing in the region aggregate to 3,035 whereas 7,927 people work in tourism related businesses (Department of Labour, 2009).

Although the seafood/aquaculture industry is of economic and socio-cultural importance to the communities in the Top of the South, that fact was unknown to the visitors who took part in this study. Only 17.2% of respondents know that the Top of the South is the largest seafood producing area in New Zealand whereas 79.8% believe it is important to know when travelling to the region and 88.9% are convinced that knowing about it would attract more visitors to the region.

To pull visitors towards a destination, they need to be provided with information that identifies the attributes they are seeking in their holiday experience (You, O'leary, Morrison, & Hong, 2000). These findings underpin that, to successfully develop tourism strategies for the TSAST, it is important to understand who visits the region, what visitors expect from the region and what are their attitudes towards the tourism products offered by the region. This knowledge might then assist in explaining whether there is sufficient demand for the TSAST to be successful.

6.2 A Profile of Visitors to the Nelson/Marlborough and Golden Bay Region

The visitor profile that was established from primary data sets shows that 38.1% of visitors to the Nelson/Marlborough and Golden Bay region are aged between 20 and 29 years. There are more female (56%) than male (44%) visitors and overall 70.5% of respondents have completed a tertiary education. Nearly half of the visitors (49.4%) are employed full time and their household income mostly ranges between NZ$20,000 and NZ$60,000, or NZ$100,000 and above. Thirty percent are domestic visitors, 23% come from Germany, 17% from Australia, 10% from the UK, and 8% from the USA.

For 70% of surveyed visitors it was their first trip to the region and they spent 4-7 nights travelling through the Top of the South on vacation (83%). They mainly stayed at backpackers (38%) and travelled with their partner (44%) independently by car (50%) to and around the region. The primary information sources for trip planning were the internet (63%), followed by guide books (57%) and i-SITEs (51%).

This visitor profile is congruent with the profile of visitors to the Nelson Tasman and Marlborough regions, which was established based on the International Visitor Survey (IVS) and Domestic Travel Survey (DTS) that were published by the Ministry of Tourism for the year end June 2010 (Ministry of Tourism, 2010a). The IVS reports data for international visitors to the two RTOs, Nelson Tasman and Destination Marlborough, and the DTS states information about domestic visitors to the same RTOs (compare Table 4.5.3 in Chapter Four). According to the Ministry, the majority of visitors to the Nelson Tasman and Marlborough regions are between 15 and 34 years old. Twenty-five percent of international visitors to the Nelson Tasman region are aged between 25 and 30 whereas 19% of domestic visitors are between 15 and 24 years of age. International visitors to Marlborough are also mainly between 25 and 34 years old (27%) whereas 21% of domestic visitors are between 45 and 54 years old. Table 4.5.3 in Chapter Four shows that there are slightly more women (52%) among the international visitors but more men (53% in Marlborough and 60% in Nelson Tasman) among the domestic visitors. International visitors mainly stay in backpackers (27%) and campgrounds (22% in Nelson Tasman and 23% in Marlborough) whereas domestic visitors prefer to stay in second homes (44% in Nelson Tasman and 45% in Marlborough). Both, international and domestic visitors, travel by car or van (61% in Nelson Tasman and 63% in Marlborough). The main reason for their trip is a holiday (57%), followed by VFR (27%) and business purposes (12%). Key markets are identified as Australia, UK, USA, and Germany (Ministry of Economic Development, 2010).

Demographic data from this research as well as from the Ministry of Tourism reflect the overall tourist profile to New Zealand. The most recent New Zealand tourism statistics for the year end August 2010 identify Australia, UK, USA, China and Japan as key markets providing 70% of all international tourists to New Zealand (Tourism Strategy Group, 2010a). The Tourism Leading Indicators Monitor July 2010 provides recent data on inbound travel. Similar to the findings from this study in the Nelson/Marlborough and Golden Bay region, the majority of New Zealand's international visitors (48%) travel for the purpose of a holiday whereas 32% of them visit friends and relatives, and 10% travel for business reasons (Ministry of Tourism, 2010b). The main age group represented by 20% of international visitors to New Zealand is 25 to 34. Seventeen percent of all international visitors to New Zealand are aged between 45 and 54 and 16% are between 35 and 44 years of age (Ministry of Tourism Research, 2010b). From June 2009 to June 2010, 27% of international visitors to New Zealand stayed in hotels, followed by backpackers (26%), motels (9%) and campgrounds (6%). Forty-three percent travel with their partner mainly by aeroplane (37%) and rental car or van (15%) (Tourism Strategy Group, 2010b). In contrast to the international visitor to New Zealand, who relies on guide books (69%) in the first instance, for visitors to the Nelson/Marlborough and Golden Bay region and for domestic tourists in New Zealand, the internet (63%) is the most used holiday planning tool. i-SITE centres (25%) are also frequently consulted by international visitors (Tourism Strategy Group, 2010b).

There are apparent similarities between respondents to this study and visitors who are particularly interested in participating in the Aquaculture and Seafood Trail on the Eyre Peninsula in South Australia. Overall, 365,000 overnight international and domestic tourists visited the Eyre Peninsula in 2008. These visitors stayed on average 4.5 nights in the region with primary accommodation being friends' and relatives' properties (28%) and camp grounds (21%), followed by hotels/motels (20%) and rented houses or apartments (9%). The main purpose of the trip was for holiday/leisure (42%) and VFR (25%) (South Australian Tourism Commission, 2008). Visitors to the peninsula enjoy a high level of flexibility: 75% take their own car and only 3% use public transport and/or coach services. The UK, Germany, New Zealand and the USA are the most frequently represented countries of origin (South Australian Tourism Commission, 2008).

This demographic analysis represents one approach to building a visitor profile by categorising the traveller in terms of their background information. However, to obtain a better understanding of visitors' intentions and specific interests in a particular tourism experience, an analysis of motivational data is also considered essential (Charters & Ali-Knight, 2002; Schiffmann & Kanuk, 1987).

6.2.1 Travel Motivations and Reasons for visiting the Region

The travel decision-making to visit the Nelson/Marlborough and Golden Bay region is strongly influenced by personal and psychological variables. Visitors' travel motivation is not revealed by this research but which factors pulled visitors towards the destination can be distinguished.

Motivation influences demand of visitors because it links the needs and wants of tourists to the holiday destination choice (Gilbert, 1991). Based on qualitative research regarding reasons for leisure travel, Crompton (1979) identifies nine 'push' motives that guide travellers towards a decision in choosing a certain type of vacation. He divides the motives into two groups of seven socio-psychological motives ('escape from a perceived mundane environment', 'exploration and evaluation of self', 'relaxation', 'prestige', 'regression', 'enhancement of kinship', 'relationships', and 'facilitation of social interaction') and two cultural motives ('novelty' and 'education'). Visitors to the Nelson/Marlborough and Golden Bay region like 'travelling' (23.7%) for the sake of travelling which implies an openness to experience some novelty and therefore acts as a push factor to motivate people to go on a holiday. Dodd and Bigotte (1997), Dodd and Gustafson (1997), and Mitchell, Hall, & McIntosh (2000) determine key push factors as enjoyment or pleasure, education and the desire to learn more, (spend time with) friends and family, differentiation and distinction (Van Westering et al., 2000). In modern society, tourist motivation research is particularly important as travel motivation derives from people's psychological needs and expectations of life. In this respect, Maslow's hierarchies of needs pyramid places self-actualisation on the top of the pyramid as it plays a significant role in identifying intrinsic motives (Cohen, 1979; Dann, 1977; MacCannell 1973; Maslow, 1954). One important trend is that tourists increasingly identify themselves through specific tourism activities (Holden, 2000).

Before people travel to the Nelson/Marlborough and Golden Bay region, they have considered these various motivations and are driven towards a decision by individual push factors. According to the results, visitors travel to the Nelson/Marlborough and Golden Bay region because they expect 'beautiful scenery' (27.1%), 'good weather' (18.6%) and untouched 'nature' (11.9%). They know that the region is famous for its many different outdoor activities and national parks such as the 'Abel Tasman NP', and the 'Queen Charlotte Track' and they identify 'hiking/tramping/walking' (17.1%) in these parks and in the area as main reasons to visit the region. They have heard about the renowned Marlborough vineyards and want to taste the 'wines' (23.7%). These are the main pull factors that attract visitors to the Nelson/Marlborough and Golden Bay region (Sharpley, 2006).

For the year end June 2010, the main recreational activities international tourists to New Zealand engaged in were sightseeing (81%), urban tourism (51%), cultural/heritage and educational activities (47%), and walking/hiking/climbing (40%). Wine and food were incorporated in their vacation by 11% of international visitors (Tourism Strategy Group, 2010b).

International tourists to the Nelson/Marlborough and Golden Bay region show a high propensity for nature-based tourism. Their number one recreational activity while on holiday was walking/trekking for the year end June 2010 (Ministry of Tourism, 2010a). Data from the Ministry of Tourism (2010a) shows that 27% of international visitors to Marlborough also like to include winery visits into their travel. Tasting locally produced wines (23.7%) was one of the main reasons for visitors to come to the Nelson/Marlborough and Golden Bay region. According to the tourism sector profile by the Ministry of Tourism (2009a, 2009b) the Top of the South attracts the international wine tourist who is likely to participate in nature-based tourism. International tourists are more likely to visit wineries than domestic tourists. In 2008, 45,000 international visitors engaged in wine tourism activities sampling the local produce. These tourists participated in activities related to local food and beverages such as festivals but also in arts and culture related tourism. Marine tourism activities such as 'scenic boat cruises' attracted 25% of international tourists to the Nelson/Marlborough and Golden Bay region. Despite the lack of information about food tourists, dining ranked first with domestic (28% in 2009 and 2010) and second (42% in 2009 and 34% in 2010) with international visitors (Ministry of Tourism, 2009b).

In order to define motivation and measure the benefits that travellers seek, it has been quite common for researchers to understand the reasons for travel, whether it be 'vacation', 'VFR', 'business' and common activities like 'rest and relax', 'visit the beach', 'enjoy the weather', 'water sports', 'fishing' or other reasons (Fodness, 1994). By way of comparison, the majority of visitors to the Australian seafood trail on the Eyre Peninsula in South Australia identify most common activities as 'going to the beach' (38%), 28% like to go 'fishing', 13% are attracted by National Parks and 11% are involved in bushwalking.

In this research, attributes such as art (1.7%), sightseeing (6.8%) and beaches (6.8%) were identified as not important by respondents. This is different from the results of the Regional Visitor Monitor (RVM) which indicates that 81.4% of international and 61.2% of domestic tourists indentify sightseeing as an activity undertaken while travelling. Culture, heritage, education, walking, hiking, and natural attractions are also stated as holiday activities (Tourism Strategy Group, 2010b).

Results from the online survey that gathered data from visitors to the Nelson/Marlborough and Golden Bay region from April 2009 until April 2010 indicate that the attributes considered important for a holiday destination such as wilderness and undisturbed nature were rated at a mean of 5.93 and interesting scenery was rated at a mean of 5.89 on a 7-point Likert scale (Hull, Grudda, & Jodice, 2010). Similarly, the results of this research's survey showed that 'scenery' (27.1%) was most frequently mentioned by respondents when they were asked to identify three important reasons for visiting the Nelson/Marlborough and Golden Bay region. As Perkins & Cushman (1998) ascertain, landscape or scenery is a major part of tourists' experiences. This is especially the case in New Zealand with tourism promotion focusing on natural settings. The brand '100% Pure New Zealand' distinguishes New Zealand as a pure and unique tourism destination, with its tourism experiences being considered wholesome, untouched and powerful. The concept of pure nature and freedom is mainly meant to attract active, outdoor tourists. These people, just as the visitors to the Nelson/Marlborough and Golden Bay region, are defined by Poon's (1993) theory of the 'new tourist' as individual travellers who love travelling, who are seeking nature experiences and who are thrilled by the challenge of exploring new destinations. Most commonly they are travellers either young of age or at heart (Morgan, Pritchard, & Piggott, 2003).

A considerable number of people (25.4%) in this study were 'passing through' the region, coming from Kaikoura or having been on the ferry from Wellington. Lohmann and Pearce (2010) consider Wellington and Picton as transportation nodes that attract different categories of visitors with differing reasons for either staying at the node or leaving the node after arrival. With Wellington and Picton as transport nodes, they distinguish between four visitor segments ('gateway travellers', 'overnight gateway visitors', 'stopover visitors' and 'destination tourists') allocating travellers to different groups based on the purpose of their respective visit.

Gateway travellers are typically in transit from one transport node to the other without staying overnight. Overnight gateway travellers follow the same reason but stay one night at the node. Stopover visitors either stay overnight or not, but have some connection to the node other than the transport, such as cultural pursuits or sightseeing. Destination tourists stay at least two nights regardless of the main reason for visiting the node (Lohmann & Pearce, 2010). As this research considers the Top of the South as a whole and recognises the nights spent in the overall region and not just in the node Picton, visitors to the Nelson/Marlborough and Golden Bay region may not be categorised according to Lohmann and Pearce.

Different destination attributes pull visitors towards the holiday destination. Food and wine are important pull factors just like outdoor activities such as hiking/tramping and sea kayaking (Perkins & Cushman, 1998). Eating out and seeking novelty has become increasingly desirable in people's lifestyles. With the experience of a new local cuisine comes the experience of a new culture. Culture and authenticity have been identified by researchers as central tourism motivators (Fields, 2002).

Gastronomy or culinary tourism can act as a push and a pull factor: pushing consumers away from their eating habits and pulling them towards a new culinary experience (Fields, 2002). Regional or local food, therefore, supports one of the main tourism activities in the region - 'dining out'. In the visitor survey, dining out was not among travellers' main reasons for visiting the Top of the South. But, as statistical data from the Ministry of Tourism (2010a) indicates, the main activities tourists undertake in the two RTOs, NTT and Destination Marlborough, 'dining' is ranked first by domestic tourists and second (after 'walking and/or trekking') by international visitors. Visitor data from Australia's Aquaculture and Seafood Trail also confirm that while visiting the Eyre Peninsula, the second highest rating (46%) of tourism activities is 'eating out' at restaurants (South Australian Tourism Commission, 2008). For the key markets such as Australia, the UK, the USA, China and Japan, the Ministry of Tourism (2010b) reports that dining at restaurants (87%) represents one of the recreational activities in which visitors participated while visiting New Zealand, either for the purpose of holidays, VFR, or business. In the year ending June 2010, 88% of Australian visitors, 94% of visitors from the UK and 89% of all American tourists dined out during their visit to New Zealand. Only 30% of domestic travellers confirmed dining out as an activity they undertook, which still represents the highest percentage of recreational activities undertaken while on holiday (Ministry of Tourism Research, 2010b).

Rural tourism strategies identify recreation, entertainment and leisure as priorities for product development, which has resulted in redefining local rural identity. Food, as a cultural and heritage element has become a fundamental part of this new rural identity. Gastronomy and eating traditional food is an important component of travelling to the countryside as eating is a substantial part of holidays that can enhance the authentic experience (Bessière, 1998). Strengths of the Nelson/Marlborough and Golden Bay region regarding tourism development and rural identity have been identified by NTT as the increasing local wine and food scene and the growing seafood reputation (Davis, 2009). The TSAST is promoting the Nelson/Marlborough and Golden Bay region for its quality seafood, local produce and as a vacation destination. Together with the New Zealand wine trail it can advertise the distinct and diverse culinary landscape as the Top of the South is increasingly turning into a culinary destination. Locally harvested seafood provides a good match with the regional wines which can be exclusively sampled at the two biggest festivals in the region: the Marlborough Wine Festival in Blenheim and the Mussel Festival in Havelock. Usually, food or drink festivals are cultural events featuring a variety of traditional food and beverages, music acts, competitions, demonstrations and good opportunities for sponsors to engage in regional marketing (Boniface, 2003).

According to McIntosh et al. (1995), tourists can be motivated by physical, cultural, interpersonal, as well as status and prestige factors. Culinary tourism can be placed as a motivating factor within all four categories. Dining behaviour and how people apply the concept of culinary tourism is influenced significantly not only by demographic and psychographic but also by social characteristics of the individual traveller. Selected studies summarised by Au & Law (2002) show that frequency and expenditure of dining out are determined by the geographical position and demographics such as age, gender, family status, level of education, annual income and ethnicity, among other factors. Additionally, there are considerable differences in character, value for money and in perception of satisfaction (Nield, Kozak, & LeGrys, 2000).

Although 91% of visitors to the Nelson/Marlborough and Golden Bay region like eating seafood, consuming locally harvested seafood is not their primary reason for travelling to the region.

6.2.2 Visitors' Interest in and Attitude towards Seafood

Visitors to the Top of the South do show interest in seafood. Ninety one percent of respondents eat seafood and 36.2% of them even eat seafood at least once a week when at home. Overall there is only a small proportion (1.7%) of visitors to the Nelson/Marlborough and Golden Bay region who identify food as one of their main travel purposes, but there is a growing market of people that have an interest in wine and food (Hall & Mitchell, 2001). These groups need to be targeted as new potential customers of food tourism products (Hall & Mitchell, 2006). Fort (2008) however, goes much further and claims that local food can be an important reason why people travel. Food is not only a sensuous experience at the core of travel, it is also the meeting point for guest and resident and guest and local culture. The new flavour of food and culture is what travellers lock in their memories and take home.

This survey revealed that, on average, every visitor had a seafood dish at least once (on average 1.12 times) while travelling the Nelson/Marlborough and Golden Bay region. Visitors prefer saltwater fish (97.8%) to freshwater fish (85.7%), and like to eat shellfish (76.9%), mussels (71.4%) and oysters (44%). In general travellers consume these kinds of seafood 'fresh' (83.2%) rather than 'ready to eat' (23.2%) or 'frozen' (10.5%). The overall positive attitude towards seafood is supported by the high percentage (91%) of seafood eaters and can be summed up by one respondent's comment that "most people like seafood". This interest in seafood does not necessarily mean that food is a travel motivator. In fact, only one visitor mentioned that he/she was travelling to the region because of food and beverage.

By analysing visitors' level of interest in seafood according to Hall and Sharples' (2003) framework, the extent to which seafood is acting as their individual travel motivation can be distinguished. Travellers to the Nelson/Marlborough and Golden Bay region show low to moderate interest in travelling just because of food. None of the respondents identified 'eating locally harvested seafood' as their primary reason for the trip to the Nelson/Marlborough and Golden Bay region. In general, they do not travel to the region because they want to taste locally harvested seafood, although 11.9% of the visitors suggested to 'offer seafood tastings' as part of the regional promotion and 11.7% see the 'chance to taste fresh seafood' as an advantage and strength of a 'seafood destination'. Interest in 'eating fresh seafood at festivals' was rated at a mean of 5.44 on a 7-point Likert scale and 25% percent indicated that they were missing fish and local markets in the region. According to Hall & Sharples' (2003) food tourism model, the majority of visitors to the Top of the South can be classified either as 'rural tourists', i.e. those tourists who show a low level of interest in travelling to the region specifically for food but visit markets, food festivals and restaurants because it is somewhat different, or as 'culinary tourists' i.e. those showing moderate interest in visiting markets, restaurants and festivals to enrich their overall tourism experience. Food, for the culinary tourist, is a secondary motivator whereas for the rural tourist it supplements other interests which are the main motivators for travelling (Hall & Sharples, 2003). The results from the survey of visitors to the region found that the majority of respondents fit into these two categories. Only very few could be labelled gourmet or gastronomic/cuisine tourists who explicitly travel to the region to visit specific wineries, markets, and restaurants, or to taste the New Zealand native Greenshell mussels in Havelock. Gastronomic tourism "implies visitation for specific high-quality tourism products" (Hall & Mitchell, 2006, p. 138); meaning behind this kind of tourism is the desire to taste a specific type of food or local delicacy.

To provide tourists with a customised food tourism product like the TSAST, changing consumption patterns and the status of food in contemporary standards of living have to be fully understood. Although every person has to eat, the biggest challenge for businesses related to food tourism is to offer a product that meets the demand of visitors (Hall & Mitchell, 2006).

An English study focusing on tourists' interest in local food from 2000 resulted in the establishment of five visitor categories (Enteleca Research and Consultancy, 2000):

1. Food tourists: a small proportion of domestic and international visitors for whom local food and beverage is a criteria for deciding where to go on holiday.

2. Interested purchasers: domestic visitors confirm that local food is very likely to enhance their holiday experience and they eat it whenever they get the chance.
3. Un-reached: domestic visitors believe that local food and beverage might add to their enjoyment of their vacation and hence are ready to try it if they come upon it.
4. Un-engaged: slightly larger group of domestic visitors than the latter do not agree that local food produce enhances their holiday experience but they are willing to try it.
5. Laggards: domestic visitors without any interest in local food who are doubtful of having tried it.

According to the findings of this study and Hall & Sharples' (2003) classification of food tourists, most of the visitors to the Nelson/Marlborough and Golden Bay region can be placed in category two and three. They are 'interested purchasers' and 'un-reached', meaning that they are interested but still have to be further convinced about the fact that locally harvested seafood can enhance their overall holiday experience in the Top of the South.

6.3 Visitors' Attitudes towards Tourism, Seafood and Marine Farming

Individuals can express their identity and culture through food and therefore food is considered an important element of cultural and heritage tourism (Bessiere, 1998; Cusack, 2000; Ritchie & Zins, 1978).

The seafood that is farmed in the Top of the South (mainly King Salmon, Greenshell mussels, and Pacific Oysters) matches seafood preferences of respondents confirming fondness of saltwater (97.8%), shellfish (76.9%), mussels (71.4%), and oysters (44%). Twenty-nine percent of visitors purchased seafood to process at their holiday place of stay. The majority (72.4%) of these 29% who did purchase locally harvested seafood found it easy to access, mainly buying it at supermarkets (mentioned 13 times).

However, respondents showed a preference for consuming fresh seafood (83.2%) rather than buying frozen (10.5%) or precooked (23.2%) alternatives, which is why ‘fish markets’ (66.7%), ‘local restaurants known for dishes’ (60%), ‘waterfront restaurants’ (58.5%), ‘seafood stores’ (56.3%), and ‘public markets’ (41.7%) turned out to be preferred purchasing locations. In general, visitors ‘prefer to eat locally harvested seafood on the coast’ (mean 5.77), while they are ‘looking for healthy seafood’ (mean 5.77). ‘Freshness’ (mean 6.69) along with ‘health and safety’ of seafood (mean 6.34) are valued very highly among respondents. As Fields (2002) argues, health concerns and the interest in nutritional benefits reflects the increasing importance of the body in a social context. Words like ‘fresh’ and ‘seasonal’ are associated with intense flavours and authentic flair (Miele & Murdoch, 2002).

A number of holiday destinations are responding to the growing interest in health and wellness and now offer food products that are supposed to have a positive impact on health and (physical) wellbeing. Aquaculture New Zealand (2010c) states that Greenshell mussels carry nutritional benefits being rich in omega-3 fatty acids, iron and protein. They are labelled healthy due to their low fat content, fewer calories and low cholesterol levels which are claimed to result in increased energy levels and a better capability to develop and repair own muscle tissue. Salmon farmers in the Top of the South nurture the fish during their natural growth cycle in order to guarantee a high quality product to ensure a safe, high quality product. Additionally, due to the clean waters, the right temperature and the fact that there are no native salmon populations in New Zealand, there are no serious diseases which otherwise require a dietary supplement of antibiotics. King Salmon also is known as a good source of omega-3, offering the highest concentration of this natural oil (Aquaculture New Zealand, 2010d). Farmed Pacific Oysters contain a variety of vitamins and minerals and are high in protein (Aquaculture New Zealand, 2010e).

Food offers more than just the intake of nutrients. It also has psycho-sensorial and symbolic features. For example, bread and wine symbolise virtues. Food is a form of social interaction, and has the ability to bring people together when it is shared and consumed with others. It can also unite communities under a common culinary heritage. It may even distinguish social classes and lifestyles (Bourdieu, 1979). With the statement “the eater becomes what he consumes”, the eater also “becomes part of a culture” and is placed in a cultural order (Bessière, 1998, p. 24).

To convert this knowledge into an educational or even advertising tool for the Nelson/Marlborough and Golden Bay region is important given the socio-cultural importance of food and the growing concern about the safety of food and health in general (Fields, 2002). Scarpato (2002a) agrees and adds that food security needs much more attention than it actually receives. It forms an important part of food trade, processing and retailing, as well as visitors’ behaviour and their food choice. This emphasises the need for education on harvesting methods but also the economic impacts for the community due to the visitors’ food choice (Scarpato, 2002a).

Education is identified as a main aspect of sustainability which respondents feel very strongly about. It is important to the respondents that seafood was ‘harvested in an environmentally sustainable manner’ (mean 5.8) and that ‘restaurants that serve locally harvested seafood’ (mean 5.57) are supported.

Greenshell mussels, King Salmon and Pacific Oysters are grown in the clean waters of the Marlborough Sounds and Golden Bay. Shellfish is monitored regularly regarding and tested throughout the year for the presence of biotoxins, bacteria, and heavy metals. Water quality also is constantly monitored and tested to a high standard, only allowing harvesting when conditions for shellfish are safe (Aquaculture New Zealand, 2010b; Dawber, 2004; MacKenzie, Salas, Adamson, & Beuzenberg, 2004; MFA, 2005). As emphasised by Robinson & Novelli (2005) one key element of SIT includes the learning experience: special interest tourists are curious and they want to learn more in order to improve themselves. Through participating in SIT, tourists express their personalities and seek admiration by others of their travel experience (Derrett, 2001).

According to Pearce (2005) visitors to the Top of the South would be categorised as the ‘new tourist’ looking for quality rather than price and seeking more and more exclusive and authentic food and cuisine experiences (MacDonald, 2001; Deneault, 2002). They want to get involved in the destination, be a part of it and take the experience home instead of just be a mere observer (Tifflin, 2005). Cohen (1972) classifies them as the 'explorer' interacting with residents and their culture, or the 'drifter' without a fixed itinerary and eager to learn about local culture and customs. In general they are open-minded. The tourist to the Nelson/Marlborough and Golden Bay can also be defined as 'good tourist' as they are environmentally aware and have taken on the sustainable experience into their travel plans (Wood & House, 1991).

6.3.1 Visitors' Beliefs and Expectations regarding Seafood

In addressing visitors' beliefs and expectations about seafood, respondents indicated that seafood is a main asset for the region from a tourism point of view and that the region should be promoted as a seafood destination (74.7%). That 'the region is on the coast' (32.2%) with a prominent 'aquaculture/marine farming industry' (17.2%) providing an abundance of 'good seafood' (13.8%) and many 'tourism activities' (10.3%) suggests the potential for developing the region into a seafood destination. Nearly 42% of respondents see advantages of a seafood destination in 'attracting more tourists' to the region, which is considered by 19.5% to 'stimulate the local economy' and to result in opportunities for 'job creation'. Roberts & Hall (2001) confirm that tourism development has the potential to create income and employment. The economic benefits for the communities from the TSAST are reflected in the number of trail related jobs, partnerships and involved businesses, the tourism expenditures, and the percentage of locally supplied labour and seafood (UNWTO, 2004a).

Through the development of a seafood destination, 14.3 % of visitors feel it is advantageous for the Top of the South to have a regional reputation and/or branding. As the region is perceived by 14.3% as an already established tourism destination, 13% think promoting seafood would add value and opportunities to the Top of the South. Nearly 12% of visitors pointed out that the opportunity to taste fresh locally harvested seafood is a main advantage for the region. Sampling locally harvested seafood does not have to be the main purpose of the trip but it can provide additional opportunities for visitors which enhance their experience and make their holiday even more memorable and enjoyable (Quan & Wang, 2004). Almost 8% are convinced that promoting the region as a seafood destination would increase awareness about the need for sustainable management of resources.

Respondents believe that access to locally harvested seafood can be improved through having ‘more fish shops’ (27.4%), ‘local markets’ (19.2%), ‘fishing boats’, and ‘dockside and roadside stands’ (19.2%). Results indicate that visitors would like to purchase and sample fresh seafood but not everyone wants to go on a mussel cruise to buy or taste fresh mussels. One example of easy access to very fresh fish is the Picton wharf. Once every weekend visitors and residents have the opportunity to buy fresh fish straight off the boat. Community members and travellers use this chance to interact socially, exchange recipes, and hear the latest news. This not only provides easy access to fresh seafood but is considered as “the antithesis of the supermarket” (Preece, 2009, p. 30) and adds value to the travel experience. The problem is that events like this seem to be a well-hidden secret. Visitors are not aware of the opportunities the Top of the South offers in terms of purchasing fresh seafood or participating in seafood related activities.

Thirty-five percent of visitors suggest that advertising is required, 25% would like to see more fish shops and local markets serving as selling points. Twenty percent expected information about where to purchase the region-specific seafood, which should be distributed in and outside the region. Creating an image or a brand for the region through advertising or promotional events can be done by various different parties such as local governments, the regional tourism organisations, the tourism industry or investors (Hashimoto & Telfer, 2006). Once established the destination image becomes inseparable from the destination and should reflect a true and appealing image of the area. That is why branding a destination requires long term planning (Hashimoto & Telfer, 2006). In terms of promoting the quality of food, beverage and tourism products of a particular place, regionality takes on an important role (Hall, Sharples, & Mitchell, 2003).

The mean of 5.77 shows that people tend to enjoy seafood even more on the coast. Consuming ‘seafood on the coast’ or where one can ‘see water’ (mean 5.02) is an important aspect of authenticity. The ‘atmosphere of seafood harvesting ports’ (mean 5.61) provides a unique experience for consuming local seafood (Deale, Norman, & Jodice, 2008). Where to buy seafood is obviously also an indicator of authenticity because ‘fishing boat’ (37.5%) and ‘dockside stand/vendor’ (37.5%) are among the most frequent mentions for purchasing locations. By preserving local food stores and farmer’s markets, these sites provide an opportunity for developing authentic experiences as well as the diffusion of culinary knowledge (Scarpato, 2002a). This concept also applies to restaurants as people indicate their preference for ‘local restaurants known for regional dishes’ (60%) and ‘waterfront restaurants’ (58.5%). In general, respondents tend to consume locally harvested seafood on the coast. Regional cuisine is considered part of culture and regional identity and it can act as a main pull factor for tourists’ destination choice (Au & Law, 2002).

Visitors have a sound opinion about sustainable practices. The belief that ‘coastal restaurants should support local seafood harvesters’ (mean 6.36) and ‘promote sustainable practices’ is widely acknowledged within visitors’ judgements. Through restaurants’ support for local seafood harvesters, new sustainable synergies may develop. For example, restaurants in Canada are collaborating with farmers in the area towards a ‘seed-to-kitchen’ concept. This incorporates regular meetings of the executive restaurant chef and farmer to discuss what should be cultivated. An agreed percentage of the crop is exclusively used in the restaurant (Fraser, 2003).

The Nelson/Marlborough and Golden Bay region may maximise economic benefits from locally harvested seafood by increasing its distribution within the region parallel to the main export industry. If regional businesses have better access to locally harvested seafood, economic leakages in host communities in the Top of the South might be minimised. The expansion of purchasing channels such as restaurants, seafood outlets and seafood farms assists in multiplying economic returns (Hall et al., 2003). Restaurants featuring local produce are closely connected to the food producers of the region. These types of establishments need to be protected as they help promote local food cultures (Miele & Murdoch, 2002). To establish new purchasing platforms such as local markets for local produce will require fostering collaboration and strengthening loyalty between producer and consumer (Hall & Mitchell, 2006). Skuras, Dimara, & Petrou (2006) argue that consumers who taste or purchase local food while on holiday, are often more likely to purchase it at home as well.

Visitors to the Nelson/Marlborough and Golden Bay region agree to some extent that seafood is 'fresher' (mean 5.65) and 'tastes better on the coast' (mean 5.28) but they would not necessarily expect that seafood is not as fresh or tasty elsewhere. Freshness and taste of locally harvested seafood can be emphasised through the application of a strong brand and destination image. Once people start associating the Nelson/Marlborough and Golden Bay region with fresh, tasty and authentic seafood, these aspects will become pull factors and important motivators to visit the region.

At the moment there is little relation between seafood expectations of visitors and their satisfaction with their visit to the region. The fact that only 26.4% of respondents have planned to purchase locally harvested seafood in the region prior to their arrival is most likely the result of a lack of knowledge about the assets of the region. Although 34.1% purchased seafood from sites along the way, only about 20.9% of visitors who toured the area planned to return to the region for seafood. Results from the parallel online survey reveal that – indicated on a 7-point Likert scale – respondents were very satisfied (mean 6.42) with their overall visit to the Top of the South and satisfied with the quality of seafood (mean 5.61) in the region (Hull et al., 2010). However, the quality of marine tourism experiences did not highly satisfy them, expressed by a mean of 4.56 which indicates room for improvement of local products and services with activities related to aquaculture and marine farming (Hull et al., 2010).

6.3.2 Visitors' Interest in Seafood related activities

According to the means, respondents to this survey agree that their preferred experiences related to seafood included the opportunity to sample fresh locally harvested seafood.

Visitors showed interest in activities such as consuming ‘seafood cooked in local recipes’ (mean 5.47) or ‘eating it at local festivals’ (mean 5.44), or even ‘learning from a chef how to prepare seafood cooked in traditional recipes’ (mean 4.83). ‘Having a travel guide indicating purchasing locations’ (mean 4.75), and ‘bring home harvested seafood’ (mean 4.58) was not as important for respondents.

The fact that respondents did not have a strong opinion for or against activities directly related to aquaculture like ‘learning about aquaculture from a marine farmer’ (mean 4.03) or ‘going on a charter boat to catch fish’ (mean 4.10) is most likely related to the lack of knowledge about aquaculture and marine farming as well as the convenience of contemporary society. People would like to be able to trace the food that they consume but that does not imply that they want to catch or hunt it themselves. As long as the local seafood is harvested in an environmentally sustainable manner, prepared in traditional recipes and consumed in authentic settings, the integrated seafood tourism experience seems to be satisfactory for the visitor.

As found by Hull et al. (2010) in the online survey, visitors to the Nelson/Marlborough and Golden Bay region rate their knowledge about marine farming/aquaculture moderately low. First and foremost this means that there needs to be more information for visitors about the safety (mean 2.75), sustainability (mean 2.67), health benefits (mean 2.48) of farmed seafood, and the history of aquaculture (mean 2.18) and marine farming/aquaculture methods (mean 2.45) in the region to improve awareness and understanding.

Compared to the results from this research it is shown that there is an interest in learning more about these topics: ‘sustainability issues related to aquaculture’ (mean 5.23), ‘nutritional benefits’ (mean 5.13), and ‘safety’ of farmed seafood (mean 5.02). In contrast, visitors’ interest to learn more about aquaculture related topics such as ‘aquaculture history’ (mean 4.57) and ‘aquaculture fishing methods’ (mean 3.86) are rated around neutrality by respondents to the questionnaire.

Even though respondents were unfamiliar with the marine farming or aquaculture sector in general, visitors were still moderately interested in participating in seafood related activities. This is evidence of the need to concentrate on sustainability strategies that include visitor education. Education can be used as a tool in the effort to maximise visitors' satisfaction and increasing their understanding and awareness of aquaculture and marine farming in the Top of the South (Orams, 1996).

6.4 Sustainable Destination Management

For a rural community to sustain itself and maintain its destination competitiveness, the region must respond to the tourists' specific requirements for products and services by adopting innovative forms of tourism (Novelli, Schmitza, & Spencera, 2006). According to the Ministry of Economic Development (2008b), the TSAST is an innovation based on its processes, new products and collaborations, and opens up a new tourism market as most important output. New processes of product diffusion are to be put in place: instead of mainly exporting the seafood products, new ways of selling and making the products accessible to tourists need to be established. The trail introduces a range of new tourism products unique to New Zealand such as the Greenshell mussel (Hall et al., 2003; Hall & Williams, 2008).

Most and for all, the TSAST can be seen as a system innovation because it is a cross sectoral approach linking the tourism and seafood industries, and it is impacting new collaboration and network opportunities in the Top of the South (Rogers, 2003; Ministry of Economic Development, 2008b; O'Rawe, 2002). By applying Boyne's (2002a) interrelationship model (Figure 2.4.2.1) to the TSAST an innovative collaboration approach is represented because the seafood production (DPR) is strongly related to tourism activities (ICR), which involves tasting and sampling fresh locally harvested seafood, be it on tours or in restaurants. The idea of promoting the area as a 'seafood destination' is also of an innovative nature as it historically has been promoted as a tramping/hiking area and an exclusive wine region. Overall, the TSAST is a mixture of products and process innovation that adds value to the visitor experience (O'Rawe, 2002). The trail and its activities related to locally harvested seafood are based on the growing interest in food as part of an authentic and culturally engaging tourism experience (Joliffe, 2003; Meyer-Cech, 2003).

Re-branding the Nelson/Marlborough and Golden Bay region as a seafood destination by promoting aquaculture and marine farming related tourism activities has advantages and disadvantages for the region. The majority of respondents (59.5%) feel there are disadvantages of turning the region into a seafood destination. Twenty-one percent are concerned about 'negative environmental impacts', 15.2% mentioning 'overfishing', and 'sustainability concerns' linked to the development of the region as a seafood destination that would attract more visitors to the Top of the South. 'Too many tourists' (12.7%) is not only a carrying capacity issue but also a question of comfort for visitors and community members at the same time. Visitors envisage 'impacts from aquaculture' (6.3%) and a few of them find that 'marine farms disturb the views' (5.1%) of the pristine natural environment of the Marlborough Sounds. The conflict between increasing utilisation of coastal areas for the development of aquaculture and its possible unfavourable environmental impacts emphasises the importance of developing a sustainable coastal aquaculture industry (Bunting & Shpigel, 2009; Chua, 1992).

The negative perception of the aquaculture industry stems from potential adverse impacts on the environment influenced by the technique applied, the locations of farms, the amount of production, and the carrying capacity of water. These aspects can affect water quality, seabed and the benthic layer (shell drop, faeces and waste), and contamination of wild stock, seabirds and marine mammals (DeVoe & Hodges, 2002).
Effective sustainable management of aquaculture needs to involve cooperation between local government, academia, public and private stakeholders and the community (DeVoe & Hodges, 2002). Coastal area management has to promote sustainability processes that do not degrade the environment, that are technically appropriate, economically feasible and socially acceptable via integrated planning and management. This sound development must be based on holistic systems-thinking, efficiency of resource use and cooperative analysis involving stakeholders (Bunting & Shpigel, 2009; Chua, 1992). In order to maintain sustainable, applied methods to the TSAST need to be monitored. To

measure the outcome of applied concepts in terms of sustainability, the UNWTO suggests the adoption of sustainability indicators to prevent environmental damage, water pollution, and crowding and ensure cleanliness of the area, and the thriving of key species (Table 2.2.1.1 in the literature review).

Advantages of marine farming and aquaculture that are fostering a sustainable approach for the communities include the expansion of protein supplies, creation of economic opportunities, jobs, and the provision of the chance to diversify and revitalise the economy within the community (DeVoe & Hodges, 2002). Fish and seafood is a fundamental source for human society, nearly one billion people depend on seafood as the main resource of animal protein. Aquaculture is significantly assisting in enlarging supplies of limited seafood resources and now provides more than 30% of fish consumed worldwide (Browdy, 2002).

Tourism planning for the TSAST must seek to avoid or at least minimise negative impacts that might arise from integrating and promoting tourism and aquaculture/marine farming. The UNWTO (2004b) suggests that environmental, economic and socio-cultural dimensions of tourism development have to be appropriately balanced to maintain its long-term sustainability in order to reduce or mitigate any undesirable impacts on the natural, historic, cultural or social environment. This can be achieved by:

- optimising the use of environmental resources, maintaining elementary ecological processes and preserving natural heritage and biodiversity.
- respecting host communities' socio-cultural authenticity and conserving their traditional values as well as their living cultural heritage in order to raise inter-cultural tolerance and understanding.
- guaranteeing viable, continuing economic operations through evenly distributed socio-economic benefits to involved stakeholders. This should include the provision of constant employment, income opportunities, and social services to host communities.

Sustainable development requires participation of all stakeholders and solid political leadership. If managed properly, the integration of tourism and the seafood sector will support sustainable development in the Top of the South, raise awareness about sustainability issues and its management and enhance visitors' level of satisfaction by providing a meaningful tourism experience to them (UNWTO, 2004b).

Suitable education of tourists about how their travel and purchasing decisions affect the economy and rural environment can lead to actions that benefit the communities in the Top of the South. The TSAST needs to consider developing educational programmes for aquaculture and mussel farm visitors, and strengthening cooperation between local food producers and their selling points. Adopting these policies assists in stimulating the rural economy promoting new tourism opportunities that support a sustainable approach based on seafood. A comparable case and valuable benchmark is the Isle of Arran Taste Trail. Arran is promoted as a niche tourism destination that offers quality local produce and cuisine (Boyne, Williams, & Hall, 2002b). The trail encourages collaboration of businesses to improve the individual visitor's experience and the local economy (Boyne et al., 2002b).

Another example is Australia's Seafood and Aquaculture Trail. Just like the Top of the South, the seafood industry is a key economic contributor for the Eyre Peninsula. Australia's Seafood and Aquaculture Trail offers now 10 seafood related tours partnering with the seafood industry. Since the inception of the trail in 2002, the focus has changed from offering seafood and aquaculture related tours to emphasising the retail of fresh locally harvested seafood (Bichard, 2007). The innovative collaboration has not only resulted in cross-promotion and promotion of the trail worldwide but also in the creation of jobs and the generation of AUS$180,000 from selling 25,000 tours in 2003 (Tourism South Australia, 2007).

Sustainable development must consider ecological limits, protect and maintain basic resources and allow access to those resources. Sustainable tourism comprises the 'recognition of the significance of the host community', 'adoption of good staff treatment standards', 'maximisation of local community economic returns', 'slow speed development', 'environmentally friendly methods', and 'tourist involvement in responsible behaviour' (Scarpato, 2002b, p. 133). Visitors have an important role to play as stakeholders responsible for the kind of tourism they develop or engage in and as temporary members of the community they are visiting (Scarpato, 2002b). Sustainable tourism is linked to sustainable development and interacts with 'societies and communities', 'environment and natural resources', 'economic systems', 'conservation' and 'agriculture' (Swarbrooke, 1999, p. 353)

Sustainability in food tourism includes the production of environmentally sensitive food. Food preparation and finally its consumption is meant to nourish body and mind (Scarpato, 2002b). The most relevant implications of this statement in a rural context are related to:

- maintaining local food production, preservation of outlets and fresh markets,
- the survival of home cooking,
- children's education towards taste and the passing of culinary knowledge,
- the right to diversity, delight and pleasure,
- tourism consequences on gastronomic authenticity and well-being of the community (Scarpato, 2002b).

This implies connectedness of typical local products with their local environment. Food culture, sustainability and economy have to be interconnected to fulfil qualitative requirements (Miele & Murdoch, 2002).

The region has shown awareness to sustainable tourism development and changing trends by engaging the tourism and seafood sectors. The implementation of the TSAST and the integration of the two industry sectors in the Nelson/Marlborough and Golden Bay region have great potential to strengthen competitiveness by applying innovative strategies, new tourism products and by focusing on an unique selling proposition. This requires strong marketing efforts by the two RTOs in order to keep an eye on the competition, demand and markets, networks and most of all in order to create and promote a recognizable brand. If marketed properly, the seafood producing industry has potential to become a strong pull factor for the region representing cultural importance and an emotional epicentre to attract visitors (Clarke, 2005).

6.4.1 Marketing a Seafood Destination

Visitors to the Top of the South see disadvantages in 'limiting the region to just seafood or aquaculture' (8.9%), referring to the need for a balanced approach to destination marketing that promotes regional assets while keeping the regional characteristics. Tourism products are marketed to visitors based on understanding the tourists' attitudes towards the product. Attitudes are emotional evaluations of positive, negative or neutral feelings that are associated to a specific destination image (Mohsin, 2005). A successful promotion of the Top of the South destination image and/or brand includes the positioning of a positive, distinctive, and appealing image or perception in the consumer's mind. However, the image should supplement and not replace the existing image of the Top of the South region which is mainly associated with scenery, wine, golden beaches and nature (Calantone, di Benetto, Hakam, & Bojanic, 1989).

For the TSAST in particular, 14.3% of visitors agree that a recognisable brand would help create a strong regional identity. The TSAST needs to distinguish itself from the wine trail and the various hiking trails in the sounds and national parks in the region. At present there is no other aquaculture and seafood trail in New Zealand. This provides an opportunity for the TSAST to stand out with a competitive advantage which could be achieved by adopting a strong destination brand (Morgan et al., 2003).

A distinctive brand or personality often creates unique and advantageous associations in tourists' minds enhancing brand equity (Johnson, Soutar, & Sweeney, 2000; Keller, 1993; Phau & Lau, 2000). A well established, strong brand impacts consumers' preferences, trust and loyalty. An emotionally appealing brand influences the perceived destination image and thus the tourist's destination choice and purchasing behaviour (Ekinci & Hosany, 2006).

Even though visitors do not associate the region with seafood, tourism and marketing planners have an opportunity to change visitors' perception by adopting a strong brand that reflects the assets of the region. If gastronomy or culinary tourism is linked to destinations, it can develop into an influential tourism marketing tool (Richards, 2002b).

To market the destination successfully, the central focus has to be on both, appreciating food as a major component of lifestyle and on gaining a better understanding of consumer behaviour (Hall & Mitchell, 2006). A minority (17.2%) of visitors to the region 'know that Nelson/Marlborough and Golden Bay is the largest seafood producing area' in New Zealand. Of these 17.2%, 47.1% have 'learned about this fact from experience' and 29.4% through 'recommendations'. These results suggest that there could be benefits in putting appropriate marketing strategies in place to educate visitors about the Top of the South's seafood assets. Eighty-nine percent of respondents 'believe that knowing about that fact would attract more visitors to the region'. Accordingly, results state that 31.6% of visitors expect 'more advertising' and information about the region so that they are better informed about locally harvested seafood and where to purchase it. In terms of promoting the Top of the South as a seafood destination, 26.3% of respondents would 'offer seafood related walks/tours' and 14.5% suggest 'more education/sustainability'. About 13% consider 'festivals' as a good promotion for seafood and 11.9% think that 'seafood tastings' and 'more restaurants/shops' would serve as good promotion tools.

6.4.2 Integration of the Seafood Experience

Throughout this research it became obvious that respondents did not travel to the Nelson/Marlborough and Golden Bay region because of locally harvested seafood or tourism activities that are related to aquaculture and marine farming. However, visitors to the region are interested in seafood, in sampling fresh locally harvested seafood, and in being educated about associated sustainability issues. Arguably, due to a lack of knowledge about aquaculture in the Top of the South, the level of interest in participating in specific marine farming and aquaculture activities is only moderate. There are several ways to enhance visitor satisfaction and maximise benefits for the community through an integration of aquaculture and tourism.

There are two different angles to consider: the consumer and the tourism stakeholder. For consumers, food is an essential part of daily routine, including when travelling. From the viewpoint of tourism stakeholders, integrating food into the tourism experience offers a mixture of opportunities such as the potential for individual companies to increase their earnings, to create a strong destination branding, to add value to existing tourism products by creating new specialised food experiences, and the chance to strengthen economic linkages between primary production and tourism (Hall & Mitchell, 2006).

Overall, it is widely acknowledged that food, and activities related to it adds value to the overall tourism experience and is often considered a type of indicator for quality tourism (Scarpato, 2002a). One of the main motivators for culinary tourism is arguably the bodily pleasure one generally gets from eating (Valentine, 1999). “The beginning and the root of all good is the pleasure of the stomach; even wisdom and culture must be referred to this” (Russell, 2004, p. 233). Even a change in eating habits and diet can be just as motivating as the settings of a traditional meal or the novelty of the experience (Fields, 2002).

Nowadays there is an increasing appreciation of food in terms of healthy and traditional food awareness. Natural products like brick oven breads, organic meat, and fresh farm products are gaining popularity. With the consumption of these often local products, the consumer links symbolic characteristics to the food and feels united with the identity, nature, and culture of the area. For a short time, the tourist is immersed in a rural identity where they are integrated into a forgotten culture. The experience of eating appears to be like a holiday itself from the universe of industrialised food (Bessière, 1998). The natural food movement expresses the need to shift from industrialised food, which is considered risky in comparison to healthy food. Due to its simplicity and authenticity, natural and local food is understood to be more safe (Scarpato & Daniele, 2003).

This emerging trend towards protection and appreciation of food that emphasises the concept of the discerning and individualised tourist has initiated the so-called Slow Food approach. Within the Slow Food approach, typical products and local food produce are of great importance for promoting cultural distinctiveness of a destination and therefore represent a powerful cultural 'heritage' (Miele & Murdoch, 2002). The quality and therefore satisfying holiday experience can be achieved by good eating and superior class food, which is labelled by Slow Food as 'good, clean and fair'. The Slow Food movement believes "that everyone has a fundamental right to pleasure and consequently the responsibility to protect the heritage of food, tradition and culture that makes this pleasure possible" (Slow Food, 2010).

In general "dining out is no longer the singular activity it once was; it is not always an activity pursued for itself or in itself, but is associated with other, mainly leisure, activities that are all part of a loose-knit collection of consumption-oriented services dedicated to making people enjoy themselves" (Wood, 1995, p. 111).

Food consumption can encompass various experiences for example eating at home, or dining out, or dining out while on holiday (Mitchell & Hall, 2003). Usually eating while on vacation has a different meaning than at home (where it is mostly regarded as functional) as the overall travel experience stimulates sensory awareness and the mind. Tourists are generally highly involved in decisions regarding their vacation and/or related activities, which is one reason to ascribe greater symbolic relevance to the meaning of eating itself (Urry, 1990).

According to Mitchell & Hall (2003), studies have shown that going to a restaurant as a tourist is a very different experience than dining out for other reasons. Understanding the experiential nature might be the key to predicting, or better understanding visitor behaviour (Mitchell & Hall, 2003). Sixty percent of visitors to the Nelson/Marlborough and Golden Bay region indicated that 'local restaurants known for traditional dishes' were their preferred purchasing location and 58.5% said they would like to consume locally harvested seafood at 'waterfront restaurants'. Nearly 27% of the respondents ate seafood at least once, 17.2 % ate seafood four times, and on average every visitor had at least one seafood dish while travelling in the Top of the South.

Although locally harvested seafood is not the primary motivation pulling respondents to the region, a good integration of the food experience might convince visitors to sample local seafood at food festivals or restaurants rather than going sightseeing or hiking instead. If the dining experience is better than expected, food becomes a peak experience that can enhance the overall satisfaction of visitors (Quan & Wang, 2004). Visitors (11.7%) stated that the trail would be a good way to sample fresh locally harvested seafood and 13% mentioned that strengths of a seafood destination are to be seen in 'adding value/opportunities' to the region. Those who follow the trail get the opportunity to taste fresh mussels while viewing a mussel farm or a mussel processing-factory. Participating restaurants in addition offer crayfish, fresh scallops, salmon, chowder or mussel pie (NZ Aquaculture, 2006).

The so-called 'tourism of taste' which includes the successful introduction of food and beverage trails around the world, allows visitors to taste the product in situ. (Abel, Thomson, & Maretzki, 1999; Govindasamy, Italia, & Adelaja, 2002). Tasting locally harvested seafood in the Top of the South can be incorporated in a whole new authentic experience for the visitor. The closeness to the coast and the education about the harvesting methods even picking the mussels by themselves adds value to the overall tourism experience (Boyne & Hall, 2003).

Food tourism can serve the communities and enhance the visitor experience in various ways as demonstrated by means of Figure 2.3.2.1 in Chapter Two. Applied to the TSAST, locally harvested seafood may stimulate and support aquaculture and marine farming activities, prevent authentic exploitation, and enhance destination attractiveness through the main asset of the largest seafood producing area and related new tourism opportunities. It also has potential to empower the communities through new job creation and may generate a new pride of being recognized as a seafood destination. This in turn will assist in enhancing the reputation of aquaculture and marine farming (du Rand et al., 2003).

6.5 SUMMARY

Although the Nelson/Marlborough and Golden Bay region is already a well established tourism destination it has to maintain a competitive advantage and therefore needs to embrace innovative tourism strategies. The integration of the tourism and aquaculture sectors offers great potential for adopting a sustainable community approach. The Top of the South Seafood and Aquaculture Trail combines innovation and sustainability in a way that supports socio-cultural, environmental, and economic development within the communities of the region by linking the seafood and tourism sectors.

For the tourism and seafood businesses that are supplying the tourism products, it is important to understand who the visitor to the Nelson/Marlborough and Golden Bay region is and why the visitor is travelling to the region. Tourists to the region make a point of being distinguished from mass tourists by requiring customised tourism experiences and identifying themselves through special tourism activities such as consuming locally harvested seafood. Culinary tourism in the Top of the South specialises in offering visitors the opportunity to taste locally harvested seafood. This experience can function as a supplement to the existing wine tourism in the region. To foster this development, the region needs to educate visitors and advertise its seafood assets. Promoting the region for its sustainable local aquaculture and using a recognisable brand that leaves a positive association in visitors' minds is needed to draw visitors to the Nelson/Marlborough and Golden Bay region.

To improve the negative perception about aquaculture the promotion of educational programmes that explain historical and economic importance, as well as sustainable benefits are necessary. In general visitors seek fresh, healthy and safe seafood and value authenticity in terms of the purchase or consumption of the seafood at specific locations.

Even though there is still low interest in marine based activities that do not include eating and harvesting locally produced seafood, there are opportunities for visitors to understand where their food comes from.

Many countries worldwide have already realised that authenticity and local produce are strong pull factors and can motivate tourists to visit a specific destination (food trails and festivals around the world) (Richards, 2002b). That is why emphasis on building a holistic seafood experience needs to be included in the tourism product for the TSAST. Interconnecting opportunities of the TSAST add value to the overall tourism experience.

7 Conclusions, Recommendations, and Future Research

In a constantly changing tourism environment, driven by globalisation and increasing demand for customised tourism products, stakeholders need to understand who their customers are in order to accommodate visitors' travel needs (Buhalis, 2000). With the introduction of the TSAST in the top of New Zealand's South Island in 2005, the MFA intended to link aquaculture and tourism through adopting an innovative strategy of a self-drive seafood trail for visitors. Initially, the trail was meant to serve as a tool to educate tourists and residents about aquaculture and marine farming in addition to raising awareness about the economic and socio-cultural importance of the seafood industry's contribution to the local communities. Being New Zealand's largest seafood producing area is a significant asset of the Top of the South as a coastal tourism destination. Researchers point out that themed trails assist in stimulating the local economy and fostering sustainable development (Hall & Sharples, 2003; Lourens, 2007; Meyer-Cech, 2004; Telfer, 2001a).

This research is meant to assist tourism and aquaculture/marine farming stakeholders in the Nelson/Marlborough and Golden Bay region in their destination planning and development of the 'Top of the South Aquaculture and Seafood Trail'. Results summarise visitors' interest in seafood and tourism experiences linked to locally harvested seafood and marine farming as part of the seafood trail. The study's aims are to verify whether there is sufficient interest to support the TSAST as an innovative strategy for sustainable tourism development.

The main aim of this study was to determine visitor attitudes and support for linking the tourism and aquaculture sectors through a seafood trail based on four objectives. The first objective outlined why the seafood industry and culinary tourism are important for the region. The second objective consisted of the profiling of the visitors to the region in order to understand their interest in seafood. The third objective investigated visitors' attitudes and expectations towards the seafood experience. The final objective outlined the benefits of a themed trail and explained how a themed trail might support an innovative and sustainable tourism approach to destination development for the region.

As part of a larger international research project that was investigating sustainable tourism development in peripheral regions, the methodology of this study was based on a visitor survey and a case study approach. A questionnaire, including closed-ended and open-ended questions, assisted in collecting domestic and international visitors' demographic and psychographic data as well as their opinions, attitudes and interest towards seafood and seafood related activities in the Nelson/Marlborough and Golden Bay region.

The integration of tourism theory and case study information has provided a foundation for understanding the economic, environmental and social benefits of themed trails. Primary data of international and domestic tourists visiting the Top of the South in the first two weeks of January 2010 assisted in generating visitor profiles and in investigating visitor attitudes and expectations towards the seafood experience.

7.1 CONCLUSION

The information listed in the case study overview reveal that tourism is a significant economic sector in the Top of the South. Over the past few decades tourism has become one of the major contributors to the local economy contributing more than NZ$350 million to the GDP and providing more than 7,000 jobs in the Nelson/Marlborough and Golden Bay region (Statistics New Zealand 2010d). The local communities feel strongly connected to the region's culture including food, arts and crafts, and fisheries. This, together with stunning scenery, wine and many outdoor recreational opportunities, attracts domestic visitors and more than one third of all international visitors to the Top of the South (Marlborough District Council, Nelson City Council, & Tasman District Council, 2009).

Fisheries and aquaculture also play a central role in the region. The Top of the South is the largest seafood producing area in New Zealand based on an aquaculture industry that was established in the 1970s (Dawber, 2004). Nowadays, the region grows about 80% of New Zealand's mussel and salmon production, which is worth NZ$232.6 million in export revenues per annum (MFA, 2009b). More than 3,000 people make their living working in the seafood, fisheries or aquaculture sectors in the area (Department of Labour, 2009).

The review of recent literature reveals that the integration of the aquaculture and tourism sectors offers great potential to support an innovative and sustainable development approach.

The profile of the international and domestic visitors to the Nelson/Marlborough and Golden Bay region shows that a slightly higher percentage of visitors are female and aged between 20 and 29. Most respondents have completed a tertiary education, are employed full time with an income between NZ$20,000 and NZ$60,000. They travel mainly for a holiday staying 4-7 nights on their first trip to the region. They take the trip with their partners mainly by car and stay in backpackers. Primary information source for their trip planning is the internet.

The analysis of collected data uncovered that 91% of all visitors like to eat seafood and that they show interest in locally harvested seafood. This includes interest in purchasing locally harvested seafood but also in tasting and sampling seafood during related activities. Findings from the field research confirm that visitors to the Nelson/Marlborough and Golden Bay region have an overall positive attitude towards seafood. They have consumed locally harvested seafood at least once while travelling in the region. Visitors are health and safety conscious, prefer to consume fresh seafood and seek opportunities to purchase it at authentic locations such as fish markets, dockside stands or at local (waterfront) restaurants. Visitors are highly concerned about sustainability issues around farmed seafood and believe in supporting local businesses. In general, their interest regarding seafood related activities focuses on experiences that involve its consumption rather than pursuing pure aquaculture or fishing opportunities.

The questionnaire results also provide evidence that at this stage, seafood is not a primary pull factor attracting visitors to the region and most of them are not aware of the availability of fresh locally harvested seafood in the area. This may result from a lack of education about the region's seafood attractions and marine farming industry as well as a lack of targeted meaningful tourism marketing efforts. Thirty-five percent of visitors indicated that there was not enough advertising that emphasises the region's reputation as the largest seafood producing area in New Zealand. Twenty percent of visitors would have expected more information about accessibility of fresh seafood. This lack of information supports the argument that visitors to the Nelson/Marlborough and Golden Bay region do not have a specific destination image in their minds that is related to fresh, healthy, and sustainable seafood. A study involving stakeholders in the region also identified weaknesses in networking, collaboration, and marketing (Sassenberg et al., 2008).

Findings confirm that visitors' interest in aquaculture related activities and their desire to learn more about history and heritage of marine farming is mostly neutral. Therefore they show only little interest in 'going on a commercial fishing trawler' or 'learning about aquaculture from a marine farmer', which suggests that they might not have an understanding of aquaculture. Through the creation of a positive image of the industry and education about the advantages marine farming offers, visitor perception may be influenced to foster more positive attitudes about marine farming and aquaculture. If people do not know about aquaculture and marine farming and the industry's advantages, they will not develop any interest in the topic or be interested in learning more about it (Voss & Schauble, 1992).

Visitors' concern about environmental sustainability and their openness to learn more about sustainability issues around aquaculture and health and safety of farmed seafood suggest that there is potential for educational programmes to enhance the overall visitor experience and improve the perceived image of the aquaculture industry.

In researching the benefits of promoting the TSAST, it appears to be promising to start with directing tourists' attention towards locally harvested seafood, its nutritional benefits and its potential as a sustainable alternative in supplying fresh seafood (without the danger of overfishing the oceans). This approach builds up knowledge and raises awareness to increase interest in marine farming and aquaculture. In addition, the trail is likely to foster collaboration through new partnerships between the primary producing sector and the food service sector to help diversify the local product offering.

A rural region like the Top of the South that is in the process of developing into a culinary destination needs to promote and market its variety of traditional and local foodstuffs along with its high class wines to build its unique character. The TSAST not only supports new product development but also takes on an important role as an educational tool to educate visitors about harvesting methods and seafood related activities making sampling and tasting seafood more easily accessible. In this context, the TSAST adds value to the tourism destination by stimulating the local economy and supporting host communities through an integrated innovative approach.

7.2 RECOMMENDATION

From a stakeholder's (supply) point of view, according to Sassenberg (2009), integrating tourism and seafood and aquaculture products holds potential economic benefits for the local communities. From a visitor's point of view (demand), as this study reveals, there are many perceived advantages in promoting Nelson/Marlborough and Golden Bay as the largest seafood producing area in New Zealand. These benefits include boosting the local economy, new product development and building a recognisable brand for the region. The focus on healthy, and safe, locally harvested seafood meets the needs of discerning tourists towards a wholesome and balanced diet and fits in with the regional character as a gourmet and wine destination.

Promoting the region's seafood and focusing on this main point of difference provides an opportunity to attract more, and higher spending visitors who see themselves as sophisticated, cosmopolitan and different from the mass tourist (Hannerz, 1996).

Visitors feel that the Nelson/Marlborough and Golden Bay region offers potential as a seafood destination and should be promoted accordingly. The focus should be on emphasising the strong unique selling proposition based on the local seafood industry. Advertising inside and outside the region is suggested to educate visitors about the main asset of the Top of the South. In line with the promotion of the region, the establishment of a regional seafood reputation and brand is considered as an advantage that might add on visitors' perceived destination image of scenery and vineyards and pull them towards the region.

In the region, visitors found it hard to access fresh, locally harvested seafood. According to visitors' expectations where to purchase local seafood more selling points need to be established. These should include fish shops, roadside and dockside stands, as well as specialised fish markets and public markets. To direct visitors towards these places, a recognisable signposting is suggested. Efficient methods are signage throughout the region that is tied to the region's seafood brand and/or through a website that indicates seafood experiences on a particular map. Additionally, a guide book or brochure indicating purchasing locations is considered a valuable information source for individual trip planning.

Visitors' interest in fresh and healthy seafood is an expandable basis for creating demand for the TSAST. Freshness and nutritional benefits of farmed seafood should be advertised and promoted by selling outlets such as fish shops, fish markets, and waterfront and seafood restaurants. It is important to incorporate seafood into the overall tourism experience. Sampling locally harvested seafood at festivals, cooking classes or specialised aquaculture tours might also enhance the visitor experience and increase visitor satisfaction.

Another way to enhance the tourism experience is to respond to visitors' concerns about aquaculture and environmental sustainability. Educational programmes on sustainable harvesting methods should be made available to visitors. Education should also address the issue of overfishing explaining how aquaculture may support a sustainable approach to the increasing seafood demand. Visitors have expressed their belief in supporting local businesses such as seafood harvesters and restaurants. At this moment, the aquaculture industry is not known for their contribution to the local communities' economy but for its significant contribution to New Zealand's seafood export industry. Building new networks and collaborations between the seafood/aquaculture industry and local businesses is not only recognised to minimise economic leakages but might also assist in explaining the socio-economic importance of the aquaculture industry for the local communities.

7.3 Limitations and Future Research

As the field work only focused on international and domestic visitors to the Nelson/Marlborough and Golden Bay region during 3-16 January 2010, the results can only provide a 'snapshot in time'. Constrained by a relatively small visitor sample the study does not claim generalisation but might serve as a foundation for further research in this area, and as a basis of comparable data for coastal destinations in New Zealand where economies are also mainly influenced by the seafood and tourism industries. However, it is not good research practice to generalise tourist profiles, even within the same country. What applies to one region might be different to another. Understanding the differences between various types of food tourists requires more and ongoing research (Hall & Sharples, 2003).

The field research was limited to two weeks of primary data collection, which meant the researcher could only include selected locations to approach visitors. Due to the cooperation between the researcher and the i-SITEs in Nelson, Blenheim and Picton, as well as the tourism operator Cougar Line in Picton, only visitors that were looking for information or service in these i-SITEs, or those taking a tour with Cougar Line, were approached by the researcher and had the opportunity to participate in the survey. Recommendations for further research would be to expand the timeframe (including high and low season) and to engage more than one researcher in the field work so that data might be collected in different places in the Top of the South. Departure points such as the airports in Blenheim and Nelson, the ferry to Wellington and the train station in Picton provide good locations to approach visitors as they are leaving the region. Further, a more

comprehensive approach would be to offer visitors additional ways to participate in the survey such as the possibility to fill out the survey online. These types of surveys would make it easier for participants who cannot fill out the survey in situ due to lack of time.
This research does not include residents' perceptions and opinions about seafood, aquaculture, tourism or the 'Top of the South Aquaculture and Seafood Trail'. Understanding residents' attitudes towards a seafood themed trail would be important in determining the level of local support for integrating the tourism and aquaculture sectors. This might be a valuable additional indication of support of the TSAST helping to inform marketing and development strategies.

With the purpose of gaining an understanding of the economic efficiency of the existing trail in the region, follow up studies need to address to what extent participating tourism and aquaculture businesses benefit from the trail and how their contribution minimizes economic leakages in the communities. In terms of maintaining quality tourism experiences that enhance visitor satisfaction and encourage tourists to return to the region, a retrospective visitor satisfaction survey can be applied by participating businesses.

7.4 Outlook

According to the results, there is sufficient demand for fresh, locally harvested seafood but the majority of visitors are not aware that the region offers it. More targeted advertising and the need for a regional brand was identified in order to attract more visitors to the region. Visitors' positive attitude towards seafood may support a successful development of the TSAST. Analysing their level of interest in seafood related activities revealed the necessity to make fresh, locally harvested seafood easily available to visitors, which can be done through specialized seafood restaurants, fish markets and stores, or roadside stands. Visitors are strongly concerned about sustainability issues around aquaculture and the environment. Addressing these concerns with adequate education programmes is considered to enhance visitor satisfaction and also to raise more awareness about the planning imperative of sustainability. The TSAST is recognised to have potential to support an innovative sustainable tourism planning approach in the Nelson/Marlborough and Golden Bay region.

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Appendix 1: Participant Information Sheet

Participant Information Sheet

AUT UNIVERSITY
TE WĀNANGA ARONUI O TAMAKI MAKAU RAU

Date Information Sheet Produced:

07 November 2008

Project Title

Understanding visitor attitudes towards seafood and tourism in the Nelson/Marlborough Region in New Zealand to foster innovative sustainable forms of tourism.

An Invitation

You are being invited by The New Zealand Tourism Research Institute (NZTRI) and the Auckland University of Technology (AUT) to participate in a maximum 30 minutes survey/questionnaire aimed at exploring the role of tourism innovation in the Nelson/Marlborough Region. This research is part of NZTRI's Community-based Tourism Programme. For this project, we are conducting surveys at this case study site – specifically the Marine Farming Association's Seafood and Aquaculture region on the South Island, New Zealand as part of the regional development agency's strategic tourism planning efforts. This region has a rich marine resource-based heritage and is using innovative practices for sustainable tourism that we are interested in documenting. We hope that you will assist us in this effort by participating in a survey. Your participation in this research is confidential and voluntary and you are free to withdraw from the questionnaire at anytime without any adverse consequences if you so desire.

What is the purpose of this research?

The purpose of this research is to identify the common characteristics of coastal tourism in New Zealand and to document and examine innovative and collaborative strategies that are being implemented. The major outputs of this research will be to inform strategic tourism planning and management decision-making by local groups and also provide examples of best practice for the tourism industry.

The results of this research will be disseminated at the case study sites as well as in presentations and publications addressing sustainable tourism in international research journals and at international academic and industry conferences.

How was I chosen for this invitation?

You were chosen to participate in this survey as a result of being a domestic or international tourist to the Nelson/Marlborough Region and you were randomly chosen.

What will happen in this research?

This project is part of a comprehensive study involving several phases.

In the first phase, information was collected on the two case study sites in New Zealand and Iceland. The regional contacts were contacted and a list of participants for the project was finalised.

In the second phase, different stakeholders in the Nelson/Marlborough Region were contacted and scheduled for an in-person interview.

Shortly after this phase the visitor survey (online and personal) is taking place. At the personal survey, you will review this Participant Information Sheet and sign a Consent Form. The researcher will then ask you a series of questions linked to your preferences, knowledge and beliefs as well as experiences related to seafood and aquaculture in the Nelson/Marlborough Region. The questionnaire will last a maximum of 30 minutes.

In the following phase the data will be analyzed and compiled at NZTRI and AUT in New Zealand.

Finally the results will be organised into a series of presentations and publications for the case study sites as well as part of a contribution to the academic literature addressing tourism innovation.

What are the discomforts and risks?

There are no foreseeable discomforts or risk to you as a participant in the study.

If at any time you feel uncomfortable you are welcome to stop and terminate the questionnaire.

There will be no association with your name or company on the survey notes. These notes will be kept strictly confidential and are only based on your thoughts and responses to the questions asked. Only the project researchers and the supervisor will have access to this information.

How will these discomforts and risks be alleviated?

All notes will be kept on a password protected, secure computer under the control of the Project Supervisor, Dr. John Hull. Any written or printed materials will be stored in a locked filing cabinet at the New Zealand Tourism Research Institute Offices at AUT University for a period of six years and then shredded. Consent forms will be kept separately in a locked filing cabinet in the researcher's office and also shredded after 6 years.

What are the benefits?

By participating in this research, you will be contributing to a study that will inform regional seafood and tourism associations of the Nelson/Marlborough region about the state of affairs of the tourism industry in the Nelson/Marlborough region.

This research will provide information for local residents who are involved in the local seafood and tourism industry. The information will help inform strategic planning in the region and assist in evaluating present innovation strategies.

How will my privacy be protected?

As part of this research we have ensured that all the information that you provide is confidential. In addition only the researchers and the supervisor will have access to your provided data. The information collected as part of this research will only be used for the project described here. Your personal name and/or your company name or business affiliation will not be used in the resulting summary material or reports published as part of this study.

What are the costs of participating in this research?

The only cost to you as a participant is your personal time dedicated to the questionnaire process. It will take approximately 20 minutes to complete the survey There are no other associated costs.

What opportunity do I have to consider this invitation?

You can decide if you wish to continue to participate in this written survey right away. You are welcome to refuse at this time. If you wish to proceed, you will then sign the Consent Form and will be guided through a semi-structured questionnaire by the researcher.

How do I agree to participate in this research?

To indicate your willingness to participate in this research you will consent to and respond to a written survey and sign the Consent Form with the researcher. The researcher will provide you with the Form at the beginning of the survey.

Will I receive feedback on the results of this research?

Yes you will receive feedback on the results of this research. All participants will receive a summary of the research by email. The summary results will also be provided to the regional associations participating in this research. The results will also be available through the New Zealand Tourism Research Institute and through the participating researchers.

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 Project Supervisor, *Dr. John S. Hull,* jhull@aut.ac.nz , Phone number: +64 09 921 9999 ext 6298.

Concerns regarding the conduct of the research should be notified to the Executive Secretary, AUTEC, Madeline Banda, *madeline.banda@aut.ac.nz*, +64 09 921 9999 ext 8044.

Whom do I contact for further information about this research?

Researcher Contact Details:

Melanie Grudda, Postgraduate Student “Master of Tourism”, AUT Auckland University of Technology, 5A/48 Liverpool Street, Auckland 1010 New Zealand. Phone number: +64 21 0455 224.
Email: melanie.grudda@gmx.de.

Project Supervisor Contact Details:

Dr. John S. Hull, Associate Director, NZTRI, Private Bag 92006, Auckland 1142 New Zealand. Phone number: +64 09 921 9999 extension 6298. Email: jhull@aut.ac.nz.

Approved by the Auckland University of Technology Ethics Committee on 17th of November 2008.
AUTEC Reference number 08/271.

APPENDIX 2: CONSENT FORM

Consent Form

Project title: ***Understanding visitor attitudes towards seafood and tourism in the Nelson/Marlborough/Golden Bay Region in New Zealand to foster innovative sustainable forms of tourism***

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

Researcher: ***Melanie Grudda***

- ○ I have read and understood the information provided about this research project in the Information Sheet dated 07 November 2008.
- ○ I have had an opportunity to ask questions and to have them answered.
- ○ 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 written surveys will be destroyed.
- ○ I agree to take part in this research.
- ○ I wish to receive a copy of the report from the research (please tick one):

  Yes○ No○
- ○ I would like to take part in a modest price draw (please tick one and write down your email address): Yes○ No○
- ○ I am happy to provide my email address to get contacted regarding the research report:

  Yes○ No○
- ○ I am happy to provide my email address to get contacted if I had won the modest price draw:

  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 17 November 2008 AUTEC Reference number 08/271.**

Note: The Participant should retain a copy of this for

APPENDIX 3: VISITOR QUESTIONNAIRE

Nelson/Marlborough and Golden Bay Region Visitor Survey

The characteristics of your most recent trip to the Nelson/Marlborough and Golden Bay Region

1. How many times have you visited the Nelson/Marlborough and Golden Bay Region in the last two years? *(Please tick one)*

 This is my first trip 2-5 times 6-10 times > 10 times

2. Which of the following best describes the duration of your most recent trip to the Nelson/Marlborough and Golden Bay Region? *(Please tick one)*

 Day trip / no overnight 1 night 2-3 nights 4-7 nights
 8-14 nights > 14 nights

3. What was the purpose of your most recent trip to the Nelson/Marlborough and Golden Bay Region? *(Please tick all that apply)*

 Visit friends and relatives Visit second home/Holiday home
 Business related Vacation/Leisure Passing through
 Other (please specify) ___________________________________

4. What type of accommodation did you use on your most recent trip to the Nelson/Marlborough and Golden Bay Region? *(Please tick all that apply)*

 Hotel/Motel Lodge/Inn Bed & Breakfast
 Rented bach/cottage/home Campground Friends/Relatives/Vacation Home
 Backpacker/Hostel DOC Hut
 Other (please specify) ___________________________________

5. Who did you travel with on your most recent trip to the Nelson/Marlborough and Golden Bay Region? *(Please tick all that apply)*

 Alone Friends Family (incl. children) Partner
 Business group Relatives Tour group
 Other (please specify) ___________________________________

6. How did you travel to the Region? *(Please tick all that apply)*

 Airplane Train Bus Ferry Car Campervan
 Other (please specify) ___________________________________

7. When planning this trip, which of the following information sources did you use? *(Please tick all that apply)*

 i-SITE visitor centre Travel agency Local tour operator
 Travel book/guide/brochure Internet Road signs
 Past experience Recommendations from friends/relatives
 Other (please specify) ____

Nelson/Marlborough and Golden Bay Region Visitor Survey

8. Please name three important reasons why you travelled to the Nelson/Marlborough and Golden Bay Region. *(Please comment)*

„Seafood Destination" = destination that is renown for its local seafood, aquaculture and activities related to the marine farming environment

9. Do you feel that the Nelson/Marlborough and Golden Bay Region offers potential as a „seafood destination" and if so, why? *(Please comment)*

10. What are the strengths/advantages of developing the region into a „seafood destination"? *(Please comment)*

11. What would you do to promote the area as a „seafood destination"? *(Please comment)*

Nelson/Marlborough and Golden Bay Region Visitor Survey

12. Do you think there are any disadvantages of developing the Nelson/Marlborough and Golden Bay Region into a „seafood destination"? If so, what would these be? *(Please comment)*

13. Did you miss anything when thinking about a „seafood destination" on your trip to the Nelson/Marlborough and Golden Bay Region?

14. Did you purchase locally harvested seafood to process yourself during your trip?

☐ Yes ☐ No

If your answer is yes, did you find it easy to access locally harvested seafood?

☐ Yes ☐ No

Where did you buy it? *(Please comment)*

15. What are your suggestions to make locally harvested seafood easily accessible?

Nelson/Marlborough and Golden Bay Region Visitor Survey

Your general preferences regarding seafood

16. Do you eat seafood?

 Yes No

If your answer is yes, which of the following types do you eat?
(Please tick all that apply)

 Freshwater Fish Saltwater Fish Oysters
 Mussels Shellfish
 Other (please specify) ____________________

17. How frequently do you eat seafood (incl. mussels) at home? *(Please tick one)*

 Several times a week Once a day Once a week
 Once every two weeks Once a month

Nelson/Marlborough and Golden Bay Region Visitor Survey

Your preferences regarding eating and purchasing seafood in the Nelson/Marlborough and Golden Bay Region

18. Are you aware that the Nelson/Marlborough and Golden Bay Region is the largest producer of seafood in New Zealand? *(please tick one)*

 Yes No

If yes, how did you learn about this?

 Past experience Recommendation from friends/relatives
 Promotional material (brochures/videos) Radio/Television
 Magazine article/Newspaper article Internet

19. Do you think it is important to know when travelling to the region?

 Yes No

20. Do you think being aware of this fact would attract more visitors to the region?

 Yes No

21. At what locations would you like to purchase seafood while visiting the Nelson/Marlborough and Golden Bay Region? *(Please tick all that apply)*

 From the fishing boat Dockside stand/vendor Seafood store
 Fish market Festivals/Fairs Grocery store
 High quality restaurant Public market Diner/Café
 Aquaculture/seafood farm Seafood chain restaurant Internet
 Seafood processor Roadside Stand
 Local restaurant known for regional seafood dishes
 Waterfront restaurant
 Other (please specify) ____

22. How many times did you eat seafood while visiting the region? _________

23. What kind of packaging do you prefer when buying seafood while visiting the coast? *(Please tick all that apply)*

 Fresh Individually frozen Ready to eat/cook meals

Nelson/Marlborough and Golden Bay Region Visitor Survey

24. Which of the following factors might be important to your selection of seafood while visiting the Nelson/Marlborough and Golden Bay Region?

Please indicate the importance for each of the following statements, on a scale of ***1="Not at all important"*** *to* ***7="Extremely important"*** *by ticking/circling one*

1= not at all important   2= slightly important   3= somewhat important
4= moderately important   5= important   6= very important
7= extremely important

When seafood was caught (freshness)	1	2	3	4	5	6	7
Where seafood was caught (origin)	1	2	3	4	5	6	7
Harvested in an environmentally sustainable manner	1	2	3	4	5	6	7
Government/Industry inspected	1	2	3	4	5	6	7
Health safety (additives, e.g. antibiotics or preservatives)	1	2	3	4	5	6	7
Price	1	2	3	4	5	6	7
Reputation	1	2	3	4	5	6	7

25. Which of the following statements best reflect your preferences regarding eating seafood while visiting the Nelson/Marlborough and Golden Bay Region?

Please indicate your agreement to each of the following statements, on a scale of ***1="Strongly disagree"*** *to* ***7="Strongly agree"*** *by ticking/circling one*

1= strongly disagree   2= disagree   3= somewhat disagree   4= neutral
5= somewhat agree   6= agree   7= strongly agree

I order seafood specialties whenever I dine out	1	2	3	4	5	6	7
I prefer to eat locally harvested seafood on the coast	1	2	3	4	5	6	7
I look for opportunities to eat seafood where I can see water	1	2	3	4	5	6	7
I believe in supporting restaurants that serve locally harvested seafood	1	2	3	4	5	6	7
I'm willing to pay more for locally harvested fresh seafood	1	2	3	4	5	6	7
I am looking for healthy seafood	1	2	3	4	5	6	7

Nelson/Marlborough and Golden Bay Region Visitor Survey

Your beliefs and expectations regarding seafood during your visit to the Nelson/Marlborough and Golden Bay Region

26. Which of the following statements best reflect your beliefs and expectations regarding seafood while visiting the Nelson/Marlborough and Golden Bay Region?

Please indicate your agreement to each of the following statements, on a scale of ***1="Strongly disagree"*** *to* ***7="Strongly agree"*** *by ticking/circling one*

1= strongly disagree 2= disagree 3= somewhat disagree 4= neutral
5= somewhat agree 6= agree 7= strongly agree

Seafood is cheaper if I purchase it on the coast	1	2	3	4	5	6	7
Seafood served at most coastal restaurants are typically locally harvested ones	1	2	3	4	5	6	7
Seafood is fresher if I purchase it on the coast	1	2	3	4	5	6	7
Seafood is healthier if I purchase it on the coast	1	2	3	4	5	6	7
Seafood is safer if I purchase it on the coast	1	2	3	4	5	6	7
Seafood purchased on the coast tastes better than purchased at home	1	2	3	4	5	6	7
Coastal restaurants should support local seafood harvesters	1	2	3	4	5	6	7
I like the atmosphere of the seafood harvesting ports	1	2	3	4	5	6	7
When I think of the Nelson/Marlborough and Golden Bay Region I think of seafood	1	2	3	4	5	6	7

27. Which of the following statements reflect your experiences regarding purchasing and consuming seafood in relation to your visit to the Nelson/Marlborough and Golden Bay Region? *(Please tick all that apply)*

Travel Planning (at home)
- ☐ Eating locally harvested seafood on the coast was the primary reason for my trip
- ☐ I looked for information about seafood restaurants serving locally harvested seafood
- ☐ I planned to purchase locally harvested seafood in the region

Travel Planning (en route decisions)
- ☐ I picked up information about availability of seafood from a New Zealand i-SITE centre
- ☐ I asked locals about locations where locally harvested seafood is available to purchase
- ☐ I purchased seafood available from sites along the way

Satisfaction level and expectations
- ☐ I know the seafood I purchased was locally harvested
- ☐ I viewed boats on which fish/mussels are caught
- ☐ I saw/heard advertising about eating local seafood

Recollection
- ☐ Eating seafood was an important part of my activities as a tourist in the Nelson/Marlborough and Golden Bay Region
- ☐ Since returning, I have recommended the Nelson/Marlborough and Golden Bay Region as a place to eat seafood to friends
- ☐ I am planning to return to the Nelson/Marlborough and Golden Bay Region to eat seafood

Nelson/Marlborough and Golden Bay Region Visitor Survey

Your interest about activities related to seafood and marine aquaculture while staying in the Nelson/Marlborough and Golden Bay Region.

28. How do the following statements reflect your interest in seafood and marine aquaculture related opportunities associated to your visit to the Nelson/Marlborough and Golden Bay Region?

Please indicate your agreement to each of the following statements, on a scale of ***1="Strongly disagree"*** *to* ***7="Strongly agree"*** *by ticking/circling one*

1= strongly disagree   2= disagree   3= somewhat disagree   4= neutral
5= somewhat agree   6= agree   7= strongly agree

Go out on a commercial fishing trawler	1	2	3	4	5	6	7
Go out on a charter boat to catch seafood	1	2	3	4	5	6	7
Learn about seafood fishing from a commercial fisherman	1	2	3	4	5	6	7
Bring home freshly caught seafood	1	2	3	4	5	6	7
Eat fresh seafood at local festival and events	1	2	3	4	5	6	7
Eat seafood cooked in traditional recipes	1	2	3	4	5	6	7
Learn from a chef how to cook seafood traditionally	1	2	3	4	5	6	7
See fishing/harvesting boats when I am visiting	1	2	3	4	5	6	7
Have a travel guide with information on locations where to purchase local seafood	1	2	3	4	5	6	7
Learn more about local seafood/aquaculture farming heritage	1	2	3	4	5	6	7
Use a travel guide with information on where to see local harvesting boats	1	2	3	4	5	6	7

I would like to learn more about

Commercial aquaculture/seafood fishing methods	1	2	3	4	5	6	7
Marine environmental sustainability issues related to marine aquaculture	1	2	3	4	5	6	7
Safety of aquaculture seafood	1	2	3	4	5	6	7
Nutritional benefits of farmed seafood	1	2	3	4	5	6	7
History of marine aquaculture/fishing in New Zealand	1	2	3	4	5	6	7

Nelson/Marlborough and Golden Bay Region Visitor Survey

Background information

29. Your gender *(Please tick one)* □ male □ female

30. What age group do you fit into? *(Please tick one)*

□ 20-29 □ 30-39 □ 40- 49 □ 50-59 □ 60-69 □ >70

31. What is your level of education? *(Please tick one)*

□ No education
□ High School Certificate or Diploma
□ Tertiary / University Certificate or Diploma
□ Tertiary / University Degree
□ Polytechnic Certificate or Diploma
□ Vocational or Trade / Professional Qualification

32. What is your current employment status? *(Please tick one)*

□ Employed full time □ Employed part time □ Unemployed
□ Housewife/husband □ Student □ Retired
□ Other (please specify) ______________________________

33. Please specify your approximate household income (in NZD):
(Please tick one)

□ > 20,000
□ 20,001 – 39,999
□ 40,000 – 59,999
□ 60,000 – 79,000
□ 80,000 – 99,999
□ 100,000 – 149,999
□ > 150,000

Other Currency

Currency name: ______________________

34. What country do you live in?

____

35. Do you have any comments about the survey and/or how it has been conducted?

____
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Thank you very much for participating in this survey!