

IS THE COASTAL TOURIST STILL LOOKING FOR A LOCAL SEAFOOD EXPERIENCE?

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INTRODUCTION

The rapid growth of coastal tourism and related development can change the character of traditional fishing communities, which are already vulnerable to regulatory changes and declining fish populations (Orbach and Johnson 1989, Baum 1999, McCay and Cieri 2000) and more recently, intensifying competition with imports. Community-based, participatory coastal zone management processes may involve commercial fishery, tourism and recreational representatives, but integrated and strategic partnership between these sectors is also important to long-term success (Baum 1999). This paper explores the potential for and benefits of strategic partnership between the tourism and commercial shrimp fishing sectors on the South Carolina Coast, with specific focus on coastal tourists' preferences regarding seafood. Eating seafood where seafood is landed seems to be attractive to coastal tourists; however, increasingly, seafood restaurants, particularly in the U.S., are serving a variety of imported seafood products while giving the impression of "local" catch. The *South Carolina Coastal Tourism Survey* was designed to identify tourists' preferences for consumption of fresh, locally harvested shrimp and for related commercial fisheries tourism experiences. This paper summarizes selected survey results to help demonstrate how seafood harvest might be tied to the development and marketing of unique tourism opportunities on the South Carolina coast.

BACKGROUND

South Carolina's commercial shrimp industry is facing problems that are affecting both its short-term and long-term sustainability. These problems include suppressed prices due to globalization of seafood trade and increased competition from foreign producers. Shrimp import prices decreased as much as 28 percent from 2000 to 2002 (Southern Shrimp Alliance 2003). In 2003 the United States Congress appropriated approximately \$5.6 million in disaster assistance to the South Carolina shrimp industry. The majority of this funding was used to provide direct economic assistance to shrimp fishermen, but \$500,000 was designated for seafood marketing. Additional assistance came from the South Carolina share (\$3.6 million) of \$17.5 million dollars appropriated for the shrimp fishery in the South Atlantic region. In December 2003, the Southern Shrimp Alliance (representing eight states—Texas, Louisiana, Mississippi, Alabama, Florida, Georgia, South Carolina and North Carolina) began an anti-dumping action against shrimp producers in China, Vietnam, India, Thailand, Ecuador and Brazil. In December 2004, The U.S. Department of Commerce found evidence of dumping by these countries and tariffs were imposed. However, the domestic shrimp industry has not seen much change in prices sufficient to allow them to compete against a farmed product in a global market (Trunk 2005). Therefore, fishermen are forced to seek out new methods and strategies to

increase the return on their investment. The shrimp fishermen in the Southeast region of the U.S. are currently exploring marketing niches based on premium quality, domestic branding, source identification, safety, and ecological sustainability. However, South Carolina shrimp harvest is a small fraction of the global market and is equivalent to only 10 percent of the demand in South Carolina.

Rather than competing with global suppliers, South Carolina shrimp harvesters may be able to develop an in-season, local, quality shrimp market niche by partnering with the state's vibrant coastal travel and tourism industries and heritage and culinary tourism development and marketing efforts. The South Carolina travel and tourism industry is the second largest employer (food service is the top) and brings more money into the state than any other industry (SCPRT, 2003). Three of the top five counties were the coastal counties of Horry, Charleston and Beaufort, and over 30 percent of the money spent by domestic travelers in the state is at restaurants, grocery stores and other eating and drinking establishments (TIA, 2002). Four of the fastest growing tourism segments in South Carolina are heritage tourism, nature-based tourism, agritourism, and culinary or food tourism. Use of shrimp fishery imagery in South Carolina travel literature is common. Restaurants and seafood retailers also use the shrimp boat image. Commercial shrimp fishing appears to be important to regional identity, local distinctiveness, culture, and history (Rogelja 2002). However, this practice does not necessarily represent a strategic business partnership between the fishing and tourism sectors. For example, a Mt. Pleasant commercial shrimp boat is featured on the cover of the Mt. Pleasant map, without the knowledge of the boat owner (W. Magwood pers. comm.)

Tension between the tourism and commercial fishing industry and dominance of recreational interests has been well-documented for Key West and other regions (Schittone 2000). Baum (1999, p. 47) suggests that tourism needs to be established before or early in the fishery decline period and "in a manner that is complementary to existing activities rather than solely instead of them." Grant (2004, p.234) argues that sustainable tourism may require participants, "aligned to a traditional tourism business stance," be re-orientated from the view that "tourism is a beneficial economic force in any form" to a view that "tourism's key role is as a driver for cultural and environmental betterment and local economic resilience." Demonstrating the importance of coastal seafood products and experiences in the decision to visit a coastal destination could be useful toward aligning local seafood harvest, settings and experiences with coastal tourism in effort to enhance coastal community sustainability. Therefore, this study examined South Carolina coastal visitors' preferences for attributes, settings, and experiences associated with locally harvested shrimp.

METHODS

South Carolina coastal visitors were intercepted from July through October, 2004 in four of the six counties of coastal South Carolina. Sampling proportion was based on visitor spending data for each of the counties. Addresses (n=831) were collected at 21 sites in various tourist venues (e.g. beach, waterfront boardwalk, golf course, botanical garden, state park, amusement park, shopping area), and participants were mailed a ten page survey upon their return home. Of the 802 good addresses, 390 returned surveys were

usable, for a response rate of 48.6%. The survey included several questions related to shrimp eating preferences and desired coastal tourism experiences and opportunities.

RESULTS

A portion of the survey results are provided here to illustrate the value of using tourism marketing research to assist the seafood industry with developing coastal tourism related strategies. A 29 item scale (Shenoy, PhD dissertation in progress) measured food preferences while traveling and this scale revealed five major underlying factors—dine local, local drinks, purchase local, dine elite, familiarity (e.g. chain restaurants). These factors were used to identify three significantly different clusters of coastal tourists—“culinary”, “general”, and “experiential” (Table 1). “Culinary” tourists were the most interested in local and elite dining and least interested in familiarity.

Table 1: Segmentation of SC coastal tourists based on food preference factors¹.

SEGMENTS	Number of Respondents	FOOD PREFERENCE FACTORS				
		Dine Local	Local Drinks	Purchase Local	Dine Elite	Familiarity
Culinary	107 (30.05%)	3.81	2.67	2.64	3.07	1.85
Experiential	140 (39.33%)	3.25	2.27	2.36	2.53	3.07
General	109 (30.62%)	2.81	1.42	1.86	1.84	2.56

¹Responses ranged from 1 to 5 (1 = “Never” to 5 = “Always”).

Respondents were asked to self assess their knowledge about shrimp (Table 2). The “culinary” cluster ranked as the most knowledgeable. However, coastal tourists as a whole are relatively uninformed about shrimp.

Table 2: Mean responses for self assessed “Knowledge about Shrimp” by subgroup¹.

Items	General	Exper.	Culinary
Cooking and preparation of shrimp*	2.49	2.57	3.13
Nutritional benefits of shrimp*	2.06	2.22	2.66
Selecting quality shrimp for purchase*	2.03	2.10	2.69
Safety of shrimp*	1.70	1.83	2.22
Seasonal differences in shrimp*	1.48	1.79	1.97
Commercial shrimp fishing	1.60	1.61	1.80
Differences between imported and domestic	1.54	1.61	1.83
Marine environmental sustainability re: shrimp*	1.29	1.35	1.64
History of shrimp fishing in South Carolina*	1.25	1.41	1.60
Shrimp farming	1.26	1.37	1.46
Shrimp regulations/ management	1.23	1.24	1.44

¹Responses ranged from 1 to 5 (1 = “Totally uninformed” to 5 = “Extremely knowledgeable”); *=significant diff. (0.05)

Respondents were also asked about their interest in shrimp related experiences while traveling on the coast (Table 3). The “culinary” cluster showed a significant difference from the “general” cluster on—1) interest in eating shrimp in traditional southern recipes and 2) timing their visit when fresh locally harvested shrimp is available.

Table 3: Mean responses for items indicating “Interest in shrimp related experiences while traveling the coast” by each cluster¹.

Items	General	Exper.	Culinary
I would like to eat shrimp cooked in traditional southern recipes*	3.61	3.88	4.01
I would like to eat fresh shrimp at local festivals or events	3.31	3.54	3.54
I would like to bring home freshly caught shrimp	3.00	3.19	3.22
I would like to see shrimp boats when I am visiting	3.20	3.12	3.12
I would like to learn from a chef how to cook shrimp in traditional southern recipes	2.89	3.07	3.22
I would like to have a travel guide with information on locations to purchase local shrimp	2.82	2.93	3.08
I would like to learn more about local shrimping heritage	2.85	2.94	2.90
I would like to use a travel guide with information on where to see local shrimp boats	2.87	2.82	2.88
I would like to tour a shrimp trawler that's docked	2.80	2.86	2.80
I would like to time my visit when fresh locally harvested shrimp is available*	2.47	2.87	2.94
I would like to learn about shrimp fishing from a commercial shrimp fishermen	2.71	2.71	2.67
I would like to go out on a commercial shrimp trawler	2.48	2.68	2.59
I would like to go out on a charter boat to catch shrimp	2.41	2.71	2.54
I would like to order shrimp to be mailed to me from where I visited	2.16	2.07	2.35

¹Responses ranged from 1 to 5 (1= “ Strongly Disagree”, 2= “Disagree”, 3= “Neutral”, 4= “Agree” and 5= Strongly Agree”; * = significant difference at .05;

The survey also asked respondents to rate the importance of 28 different shrimp attributes. Taste, quality, health, safety, freshness and value related attributes were most important for all three segments. Supporting local fishermen and USA caught were less important to all groups, but more important than a regional brand of shrimp. “Who caught the shrimp” was the least important attribute.

IMPLICATIONS

The goal of the South Carolina shrimp industry is to increase domestic shrimp prices. One possibility is marketing local, fresh shrimp as a premium and unique product. The research suggests that at least one-third of the South Carolina coastal tourists are culinary tourists interested in unique eating and dining experiences related to shrimp. Shrimp harvesters and restaurants could work with the hospitality and dining industry to provide, market and enhance culinary experiences through distribution of quality, fresh, in-season shrimp to the coastal area. However, restaurants and shrimp fishermen will need to overcome local distribution barriers, and restaurants need to be assured of the superiority of the local product, including taste, quality and safety. The industry has developed a new quality initiative called Wild American Shrimp, Inc. (WASI), and industry members will soon be trained in procedures necessary to meet the WASI standards. Fishery managers, tourism marketers, and the seafood industry should improve outreach and education about shrimp fishery management and selection and preparation of shrimp. Strategic

partnership between tourism and fishing industries might have the following objectives—1) integration of commercial fishing culture in waterfront planning as a means to create a unique tourist experience, 2) innovative marketing and distribution of locally harvested seafood (e.g. direct marketing through public market venues or partnership with local restaurants), and 3) providing unique experiential education opportunities (e.g. commercial dock tours). The later objective is particularly important as a means to tell positive stories about the fishing industry and balance the media's characterization of commercial fisheries as destructive and exploitive.

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