

## **A Tale of Two Fishes: Exploring the Delivery of Wales' Rural Food Tourism Strategy.**

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### **ABSTRACT**

*This paper is based on a range of empirical case studies of place based rural food tourism events e.g. food festivals, fairs and trails across Wales relating to seafood and fish. The research examines the theoretical concept of responsible tourism as applied to local food development and discusses the perspectives of resilience and sustainability to explore and question emerging realities of equitable access to and development of local food.*

**KEY WORDS:** *Welsh rural development, seafood festivals and events, fish tourism, governance,*

### **1. Introduction**

This paper explores the changing demand and provision of rural gastronomic tourism experiences through festivals, events and trails in North Wales. Some of these are emerging organically from community driven local food heritage development, others mushrooming ephemerally as opportunistic responses to a combination of visitor demand coupled with available funding for food and drink based celebrations which are often ephemeral in nature.

Currently along the chain of coastal town and shores of North Wales the re-establishment of fish and seafood experiences includes the searching out of markets or hidden traditional fishmongers enables the purchase of special distinctive food from new places visited with growing demands for place based foods such as Conwy Mussels or Llŷn Lobster. More sophisticated consumption of the catch of the day swimming in value-added by the area's capable restaurateurs is a growing fashion for white fish caught locally often sold at premium prices but tourists returning to forage in local fishmongers also provide a return to family fishers foraging for shell fish and highly prized bottom dwelling hand potted crustaceans from the deep cold recesses of the heritage coasts of Llŷn or Môn which are hand dressed and command a premium price compared to more bulk air dressed crabs from the East Coast. So valued are these coastal resources that their exploitation has been recently contested off the Llŷn Peninsula Area of Outstanding Natural Beauty (AONB) with the debate being temporarily won by commercial fishing community locally. The battle was fought focussed around the benefits or otherwise of more stringent conservation measures within the Marine Protected Area (MPA). Such measures would also impact on traditional beach family holidays and sailing but most substantially on gastronomic sea-fish based tourism.

This paper follows case study stories from within both the seafood fishing industry and inland fishing (currently recognised as sport and recreation in the UK) in terms of their tourism potential, focussed on experience and celebration; festivals, trails and events.

### **2. Approach**

Participative industry-facing research within the sector was undertaken with fish based food and activity tourism businesses during 2015-16 in order to gauge the current challenges to the future expansion of these activities on offer in North Wales.

Empirical case studies are presented to demonstrate the range and nature of seafood festivals, markets and events, fishing experiences and trails which offer and potentially would add a valuable contribution to the local value of the refreshed nature of this areas traditional fish based or pesca-heritage.

The relevance of tourism focussed innovation in delivering the wellbeing and sustainability goals prioritised by Welsh Government's recent Future Generations legislation was also explored.

### 3. Background

Fish and shellfish offer opportunities for festivals and gastronomy trails and other experiences based on a more localised and seasonal seafood heritage. A growing number of specialist festivals, events and trails are emerging for those who have the taste for the catch but have no patience or knowledge of fishing. Festivals celebrating such distinctive locally sourced foods have grown in number and popularity both globally and the UK e.g. Aberdyfi Seafood Festival and the Pembroke Seafood Festival in Wales; with their strong food heritage, traditional farming landscape and the currently substantially tourism based rural economy of the Cardigan Coastline, Llŷn Peninsula, Anglesey and the North Wales Coast. The year by year successes reported by food events and more lately seafood focussed events such as the Menai Seafood Festival (Case Study 1) all clearly evidence growth.

However it is argued (Meyer-Czech, 2011) that food and drink trails endow longer and wider benefits in comparison to festivals which are generally one day annual events. These types of slower permanent celebrations embodied in place or represented in fixed sites can give a longer and wider benefits especially in terms of building collaboration or social capacity. Such trails, though challenging for their development and effective organisation may deliver longer term benefits in terms of developing particular places and peoples rather than being fixed in time or seasonal.

Foraging for wild produce or even hunting where permitted, including sea-fishing and shellfish gathering along the coast, and coarse inland fishing on both lakes and rivers along with managed lakes or stocked fisheries are growing in appeal.

The learning or mimicking of such traditional food sourcing skills once commonplace in coastal villages is forgotten but along with seasonal foods and local food preferences, such practices may again become fashionable and new sites and resources increasingly communicated and developed to offer such experiences. Close partnerships with local fishing associations need to underpin such development as these organisations ensure community focussed behaviours and detailed scientific monitoring of fish stock and catch, also water quality has led to Strategies for Angling Development in several EU states, for example the Wales Marine and Fisheries Strategic Action Plan (Visit Wales, n/a) and the National Strategy for Angling Development (NSAD) 2015-16, 2016. These set the triple baseline for sustainable and responsible development of fishing based tourism.

Welsh fish for example roach, perch, pike, carp and even stocked rainbow and brown trout are all fish upon which Wales', Scotland and Ireland's rural recreational tourism and traditional sporting activities are highly dependent. Often associated with adventure based experiences that have been marketed in a recent campaign by Visit Wales using the hashtag find your epic (#findyourepic), sea fishing has been championed by celebrities such as Cerys Matthews and Adventure Ambassadors for Wales; Bear Grylls and Richard Parks.

*'Fishy, fishy, jump on my line! I sang. And they did, in spectacular iridescent wriggling dress. And I got hooked.'* Cerys Matthews (Visit Wales, n/a)

With this new bodily immersion in the rural (Woods, 2011) longer term and responsible tourism development points to a substantial range of new specialist, and thus lucrative niche tourism products, ranging from the experience of catching to that of tasting from rod to plate or hook to fork. Such immersive experiences strangely deliver on several levels of Maslow's Experiential Hierarchy (Tikkanen, 2007) as well as on a wide range of ecosystem services, thus supporting ecosystem wellbeing and health endowing recreational experiences (Pope et al., 2016). However, these new offers of experiences as rural recreational goods will require careful management and monitoring of their sustainability in many areas such as in National Parks and AONB's or sites along Wales' National Coastal Path.

Fishing trails that link good fishing spots with quality fish based gastronomy as a chain of recreational and tourism attractions and experiences are currently underdeveloped and un-publicised in Wales, being commonly only listed as good fishing sites (Visit Wales, 2015). This may reflect the remoter, more tranquil and solitary nature of such touristic or leisure activities. However this paper suggests that telling the full stories of these fishing experiences could add significant value to many remoter areas of North Wales, for example Llŷn Brenig and the quiet lakes of Anglesey, upstream rivers and estuaries of the Dee, Conwy and Dyfi. Some of these new

and sensitive sites and visited areas will require permanent management or employed staff with increased public access, footfall and publicity.

Coarse and game fishing experiences especially for new entrants into the leisure activity or family fishing activities is often supported in artificial lakes and stocked fishery systems that may also offer opportunities for coaching, cheap hire of equipment and possibilities of joining competitions. Usually these customers - often tourists in search of new fishing experiences or in search of past childhood days, are well serviced by a fully stocked cafe or restaurant providing warmth and toilet facilities. The number of fish caught in fisheries such as Eisteddfa Fisheries (Case Study 2) may be restricted to two, possibly three per net even though many more may have been caught using humane barbless tackle and are always to be returned alive.

### **3.1 North Wales Fishing Heritage and Harvest**

‘With a fleet of over 460 licensed vessels employing 850 full-time and part-time fishermen, Wales’ seafood industry is significant to the local economy and vital for the long term sustainability of many coastal communities’ (Seafish, 2016).

Much of the Welsh catch of both shellfish and coastal fish commercially caught is from small private operators. Most of the high end produce namely lobster, spider and shore or edible crabs, prawns and occasionally langoustine are caught around the Orme, off the coasts of Llŷn and Anglesey where they are landed at small ports such as Holyhead and Amlwch and in Llŷn at Abersoch, Nefyn, Pwllheli and Aberdaron. Wet fish harvests are transported to the nearest wholesale market in Llandudno or sold direct to restaurants in longstanding supply chains the purchaser and seller both returning information on the transfer of product to the Marine Management Organisation (MMO). These markets such as the Mermaid Wholesale Market in Llandudno (Case Study 3) are new honeypots for foodie tourists as traditional quayside landings are very rare. Some fish may be transported to Manchester dependant on seasonal demand to obtain optimal market price. However, in recent years the geographical scale of seafood markets have expanded and can be found across the globe: *Lobsters from The Lobster Pot on Anglesey are currently on menus in Tokyo, Hong Kong, Dubai, Vancouver and New York* (Welsh Government, 2015).

Wet fish such as seabass, hake, occasionally mullet and historically herring are harvested by a significantly reduced fleet in recent years in the North Wales Coast. Occasionally when in season, wild sea and brown trout and salmon are caught either by the small handful of family licenced estuarine nets that remain or even more rarely by coarse line where licenced. These rare wild catches are tightly controlled in season and farmed fish are by necessity sourced for restaurants from the East Coast, Cornwall or Scottish Waters. Local fishers can achieve very high prices for their fish, if willing to sell on to local restaurants that hold a buying licence. Though this is not a sufficiently dependable source for most eateries, this wild fish is scarce on menus despite premium prices and demand by both locals and tourists. No locally farmed salmon, seabass or trout are available to supply local demand for local fish for the restaurants across the heavily populated summer resorts of the North Wales Coast such as Beaumaris, Rhyl and Llandudno.

The story is similar for shellfish - Whelks and mussels are locally available with mussels being commercially farmed in the Menai Strait and in Conwy. Cockles due to stringent food safety licensing regulations require highly costly processing plants and thus are not locally sourced or sold for consumption despite being traditionally much more widely collected and part of Welsh gastronomic heritage.

Traditionally the fish landed in the counties of Gwynedd, Anglesey and Conwy were brought ashore to small ports of Moelfre, Nefyn, Barmouth and Caernarfon. Over a hundred years ago, more herring were captured by boats operating directly from the beach at Nefyn than at any other location in the UK (Amgueddfa Morwrol Llyn Maritime Museum, n/a). More distant from market settlements harboured casual fishing activity where fishers combining fishing with farming smallholdings generated mixed incomes and a ready supply of food sold at small markets locally such as Pwllheli, Aberdaron, Llandanwg and Aberdaron.

### **3.2 Food Tourism - Governance, Policy and Funding**

The importance of locally sourced foods of Welsh provenance to both rural tourism and the economic development of coastal settlements has been clearly stated and repeated within numerous several key strategic visions that Welsh Government has established for the tourism organisations locally:

*'Food is an essential part of the coastal tourism offer for Wales...there have been significant improvements and additions to the food offer in recent years, both in terms of local produce and its preparation and presentation in cafes, restaurants and other eating establishments around the coast'*  
(Welsh Government, 2008)

In order to stimulate the development of new areas of tourism development the recently launched Food Tourism Action Plan for Wales 2015-2020 (2015a) identifies the scope for the development of food tourism in Wales and aims to integrate food tourism into all of Welsh Government's tourism activities.

Its overall aims are to:

- improve visitor access to and awareness of Welsh food and drink
- encourage Welsh hospitality businesses to source more local food and drink
- increase the prevalence of Welsh food and drink on menus and retail offering and
- identify skills gaps in knowledge, sourcing and preparation of local food and drink

In order to achieve this, it recommends a series of promotional and PR activities, including its own Visit Wales website, working with regional catering colleges and other stakeholders to champion locally sourced food and drink, and raising the quality of the food offer at signature and major events, activities and attractions. It advocates the development of a best practice model for events and activities such as food festivals and food trails and urges its own Major Events Unit to encourage event owners and organisers to source local/Welsh food and drink at their events wherever possible. It also states the need to ensure coordination between food events emanating from the current round of the Wales Rural Development Plan (Welsh Government, 2016).

These strategies are currently considered alongside Local Authority tourism co-ordinated Destination Management Plans such as (Conwy County Borough Council, 2015; Gwynedd Council, 2013; Isle of Anglesey County Council, 2012) to be guidance frameworks within which projects funded from European sources such as Rural Development Programme (RDP), Liaison Entre les Acteurs du Développement Économique Rural (LEADER) and European Regional Development Fund (ERDF) should sit. Fishery based developments are implemented widely across European member states, through partnerships of public and private sector stakeholders or Fisheries Local Action Groups (FLAG). FLAGs enable and facilitate change that directly results in greater overall sustainability across the industry, potential representing the industry to the wider world as catalyst to enable ecologically and economically sensitive change working alongside stakeholders to develop the wider interests of the coastal communities in the area.

The final layer of governance that should inform Welsh tourism development and thus all fish based initiatives within both gastronomic tourism and recreational tourism is Welsh Government's unique legislative commitment to Sustainable Development which is both a cross cutting strategic policy influence and recently enshrined in the Future Generations Bill implemented through reporting to both the Future Generations Commissioner and Public Services Boards on the wellbeing goals for the economy, society and environment of Wales shown in Figure 1. Tourism development, in this case fish based gastronomy and fish based recreational experiences, pose challenges for such reporting given its resource use history and seasonal and longer term impacts on local community, culture and environment without responsible monitoring and management.



Figure 1: Welsh Well-being Goals (Welsh Government, 2015b)

#### 4. Case Studies

##### 4.1 Menai Seafood Festival, Anglesey

The Menai Seafood Festival, Anglesey was established in 2013 with two main aims; firstly to promote the local fishing industry and secondly to reconnect people, place and produce. The festival is a non-profit event run and organised by a committee of local residents and businesses such as Gorau Môn/Best of Anglesey Food Group, Anglesey Farmers' Market and the Fisheries Local Action Group. Whilst delivering a financially efficient festival there has not been an overly-obvious commercial driving element which precludes broader participation by small enterprises and the voluntary sector. The festival is host to over 100 stalls showcasing local produce from farmers, fishermen and producers; highlighting both land and sea foods. As a result the Festival has a broad appeal and even greater level of goodwill and support within the two counties of Gwynedd and Môn. The initial event in 2013 attracted over 10,000 people, and since then the festival has grown year on year and has become an important tourist attraction.

The festival has established itself within the community as much more than just an annual economic asset. The festival has helped promote community cohesion and social solidarity by encouraging them to engage with the festival as a whole; planning, consultation, support, administration etc. There are open meetings held before the festival each year, where residents can voice their opinions and views about previous events and suggest possible improvements for sequential festivals.

Food Slams are also held in the run-up to the event where stalls can showcase their local produce in a touring pop-up market and where the public pay a small entry fee for an afternoon/evening of gastronomic and social experiences.

The festival also works with local schools prior to the event, with a schools project running an education programme based on sea life and coastal environments. The programme sees a range of guest speakers from chefs to marine biologists to artists, conducting both interactive and educational workshops with local primary school children. In 2014, over 220 key stage two children engaged with the programme spanning seven local schools.

#### **4.2 Eisteddfa Fisheries**

Established in 2001 Eisteddfa Fisheries is a chain of 5 small lakes across a 7 acre site close to the historical castle town of Criccieth in Gwynedd. The business was developed using private funding for the diversification of the third generation traditional sheep farm. Nine part-time staff are employed across fishery management, grounds keeping, shop and cafe, including seasonal posts between March and October.

The fishery operates mainly as a family attraction on two designated pleasure lakes and 3 specialist coarse carp and fly lakes which host fishermen during closed season for river fishing. Occasional competitions are hosted. Many returning local and visitor specialists regularly use the site as well as passing families of holidaymakers with a day ticket offer of £20 for 4 on the family lake where the lakeside cafe and amenities are located. A range of equipment can be hired or bought from the onsite shop. Ticketing allows for fish either to be returned using barbless hooks or for a maximum of two fish to be taken home.

Significant challenges facing the business are covering their staffing costs, VAT paperwork due to the complex nature of a business as part-enterprise within a larger farm and cottage letting business and also the weather. Development of a more fish based menu and cafe products require further specialist staff training to maximise the resources on site. Due to being tied into the business all week, the owners' time is fully committed which limits new marketing or business development workshop attendance during the season. As fishing is classified as a blood sport the fishery is not currently included in a local outdoor/adventure tourism partnership network that has funding for business support. The cafe hosts pop-up global menu evenings with guest local chefs and regularly offers the kitchen and meeting room as a training venue or for free fundraisers for voluntary organisations.

In order to access specialist consultancy support to set up the website the business gained Visit Wales funding 2 years since and also a Rural Development grant for kitchen and cafe equipment. The Environment Agency advised closely on the development plan for the lakes and support came from the Wildlife Trust regarding otters that live and fish locally.

Located next door to a busy caravan and campsite the attraction offers reasonable all weather facilities:

*'that allows whole families to build memories enjoying time learning and having fun with older generation whether they are 4 or 80 years old which is a regular occurrence as many return every year for their fishing experiences. Our second aim is to support fishermen whether they are fishing as a sport or as a recreational pastime day or night' (Owner).*

#### **4.3 Mermaid Seafoods**

*'We take pride in, where possible, buying the freshest possible catch direct from local fishermen....make sure our customers buy crabs that are sustainably caught, hand sorted and graded for the best quality...have a heritage supplying some of the best restaurants and hotels in north Wales, but also a thriving over the counter trade to the public'(company website)*

*Mermaid Seafoods* (wholesale and retail) is a thriving family business located on an insignificant industrial estate in the historic resort of Llandudno. Established in 1984 the wholesale trade initiative was a natural follow on to a previously successful fish trawling business operating locally. The twelve full time staff members' activities range from selling wet fish and fish products, hand dressing crabs, managing live lobster tanks, training students in the local FE College on fish filleting and dressing. The business has experienced year on year growth of demand for fresh fish from local hotels and eateries which means a small fleet of vehicles are used to deliver frequent and large orders across North Wales. Mermaid Seafood. Local retail customers are served in their lively shop with chalked displays of 'catch of the day' and which is very soon to be expanded from the shed come shop where well over 15 types of local fish

and shellfish in season are displayed and a much wider range sourced from across the UK and mainland Europe.

EU regulations and the administrative loading of documenting and processing returns statistics of buying and selling added 'at least two hours per day' as the main challenge reported by the business along with unfair competition from more mobile suppliers who often bypass environmental health regulations. Demand for fresh fish was growing year on year from the local hospitality sector and from retail sales to the public which increasing included visitors to the area.

Tourist visits and associated sales are either through personal recommendations to guests of local hotels supplied by Mermaid or through web based foraging. The gastronomic experience is interestingly colourful as the visits can also include informal displays of fish filleting as others gaze at the clean and well stocked and honestly presented sales counter loaded with glistening fishes both wild and farmed local and otherwise for all tastes. Undertaking negotiation on the price of large princess scallops caught locally with the female staff however does not seem to be worthwhile as the growing demand ensures the market prices are fixed.

Despite the business being highly respected with supply and hospitality networks based on a long standing and highly valued relationships the business does not enter into collaborative initiatives such as festivals or fish trails and has been based on private enterprise and funding with FLAG support being used only for signage for two festivals visited.

*'I worked two, 13 hour days and only made £100 profit as we had to cover refrigeration costs also. For us, staffing many festivals is not worth it...but it does put you on the map' (Owner)*

## 5. Discussion

The examples given above illustrate both the challenges and opportunities presented by the evidenced growth of gastronomic tourism in the study area, indicating that supply and demand for raw ingredients for eateries will require carefully monitored sustainable development of all types of locally exploited fish and shellfish resources. The FLAG for Conwy, Môn and Gwynedd and other key players will need to address head on the fragility and vulnerability of the local supply chain, as well as ensuring its local economic and social optimisation. Its exploitation due to competition in the longer term may limit or restrict the access of smaller restaurants and even wholesalers to fishermen that can and will supply locally fished fish.

Seasonality factors, weather and climate along with acidified water and run off from farmed land affecting upland lakes and spawning grounds will also pose challenges for the planning of growth for all types of fishing experiences, as will working closely with local associations on licencing and permits for access to a growing number of casual fishing interests.

Responsible fisheries co-management (Pope et al 2016) based on adaptive approaches are required on both coastal and river and lake systems only responsibly deliverable by professional and trained staff to ensure the sustainable maximising over longer of term community benefits. The responsibility of statutory bodies managing the interface between natural environment and this type of tourism market demand for growth cannot be overstated. Whilst significant scope exists within the study area for many new fishing and sea food and fish trails and celebrations, key regulation needs to be maintained of catch sizes, fish health and quality as well as river and coastal biodiversity. All of these contribute to fundamental ecosystem services and our overall wellbeing as well as supplying gastronomic and recreational tourism experiences or recreational goods and services. Such a fine and important balance should not simply be left to market based regulation and competitive entrepreneurial activity, often initiated by speculative commercial outside interests as is the case for some festivals (not all), where place, people and tourism resource based sustainability may not be always be the main nor guaranteed priority.

Wild fish as a wholesome, cheap and accessible dietary protein was traditionally part of the food heritage of rural Wales. Sharing this food as a healthy option for the local family table alongside the growing demand by

tourists by ensuring local access to fishing and to supplies of affordable fish for everyday meals also needs to be addressed and managed. This poses significant challenges to policy makers and implementers of strategic projects along the supply chain. Strengthening local supply network relationships and ensuring that the full value of local products is recognised and circulated locally are both key factors to ensure resilience of the sector when much of the fish is currently exported unbranded as Welsh in origin to other EU member states or beyond with very little or no local value added despite growing local demand for a very scarce range of products.

## 6. Conclusion

Fish are a valuable natural resource and historically a very important part of the coastal rural economy and coastal communities. With changes in fisheries practice and dietary preferences, much of this value has dwindled in recent years, but with a resurgence of interest in piscatorial heritage and the growth of food tourism and leisure activity, renewed efforts are required in order to manage and develop these assets sustainably and responsibly, ensuring that we optimise local socio-economic benefit.

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