



DIRECTORATE-GENERAL FOR INTERNAL POLICIES

POLICY DEPARTMENT B
STRUCTURAL AND COHESION POLICIES



Perspectives for the Development of Tourism Activities Related to Fishing

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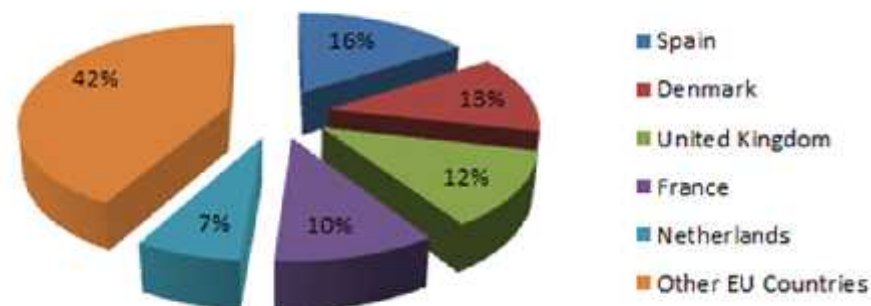
Introduction

- This Note is meant to help understand which practices and support efforts have been successful in accelerating the diversification of fishing communities into tourism-related activities across the EU.
- It encompasses lessons learned for the **European Maritime and Fisheries Fund (EMFF) for the 2014 – 2020** period.
- It includes case studies of successful diversification initiatives in EU communities, which are believed to have potential for replication or enhancement with the new EMFF.

I. Background

- The EU fisheries sector faces **challenges and constraints** derived from excess of investment, cost increases, reduction of resources, lack of preservation of fish stock, and loss of market share to imports; resulting in a decrease in the number of fishermen at 4% to 5% annually.
- Fisheries production is strongly concentrated in Spain, Denmark, United Kingdom, France and the Netherlands, which represented 58% of total EU fisheries production in 2009.

Figure 1: Total EU Fisheries Production - All Fishing Areas (EuroStat 2009)



European Fisheries Fund

- The EU has supported the sector with financing for fisheries diversification into tourism-related activities since 2000.
- In the 2007-13 period, EUR 4 304 million was allocated for fisheries and aquaculture through **Axis 4** ^{JRS1} **of the European Fisheries Fund**. Funding allocations were assigned based on parameters such as size of the sector, number of fishermen, degree of adjustments needed, etc.
- The Commission has proposed an allocation of over **EUR 6.5 billion** for the 2014-2020 ^{JRS2} period, which complements and supports the reform of the Common Fisheries Policy (CFP).

Slide 5

JRS1

not:

Axis 6

SEMRAU Jakub; 11/03/2014

JRS2

not:

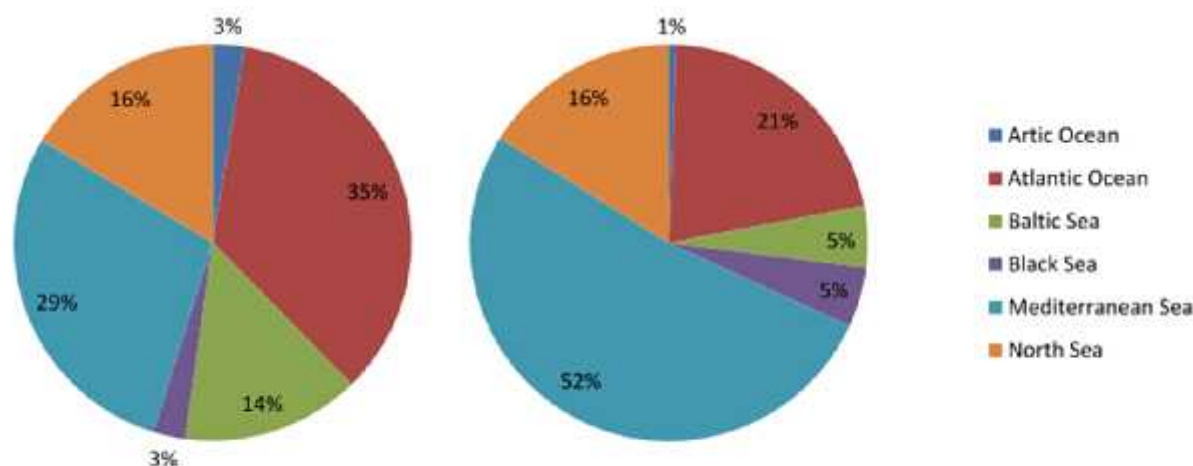
"upcoming" (as it no longer is that, but rather started & running)

SEMRAU Jakub; 11/03/2014

The need to diversify

- Fishing communities tend to be **over-dependent** on this single source of income; diversification is needed to improve local livelihoods and ameliorate the declining profitability and employment.

Figure 3: Structure of total fisheries employment (left) vs. total tourism employment (right) in the EU

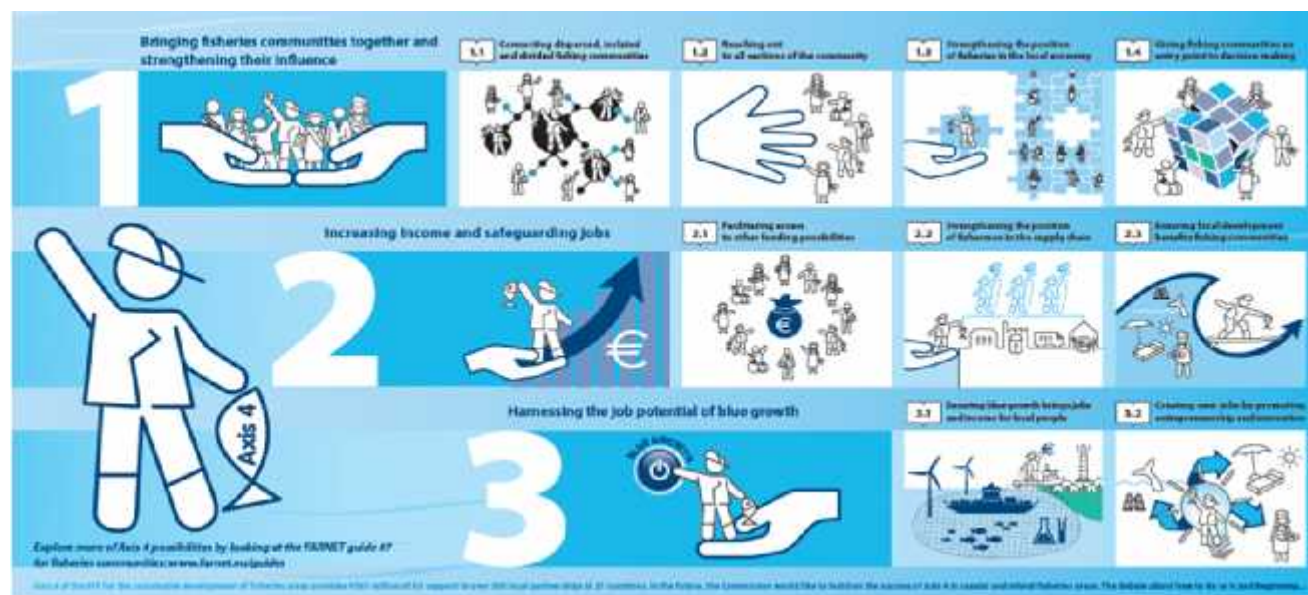


Source: Adaptation from Figures 1 and 2 of APPENDICES to the ESPON Interim Report (ESPON, 2011)

- Tourism services provide approximately 12% of total EU employment; tourism assets of fishing villages provide diversification opportunities.

Axis 4

- The diversification into tourism activities of fisheries-dependent communities and families was supported by EU projects financed by the **EFF Axis 4**, managed by the FLAGs (Fisheries Local Action Groups) and supervised by FARNET (EU Fisheries Areas Network).

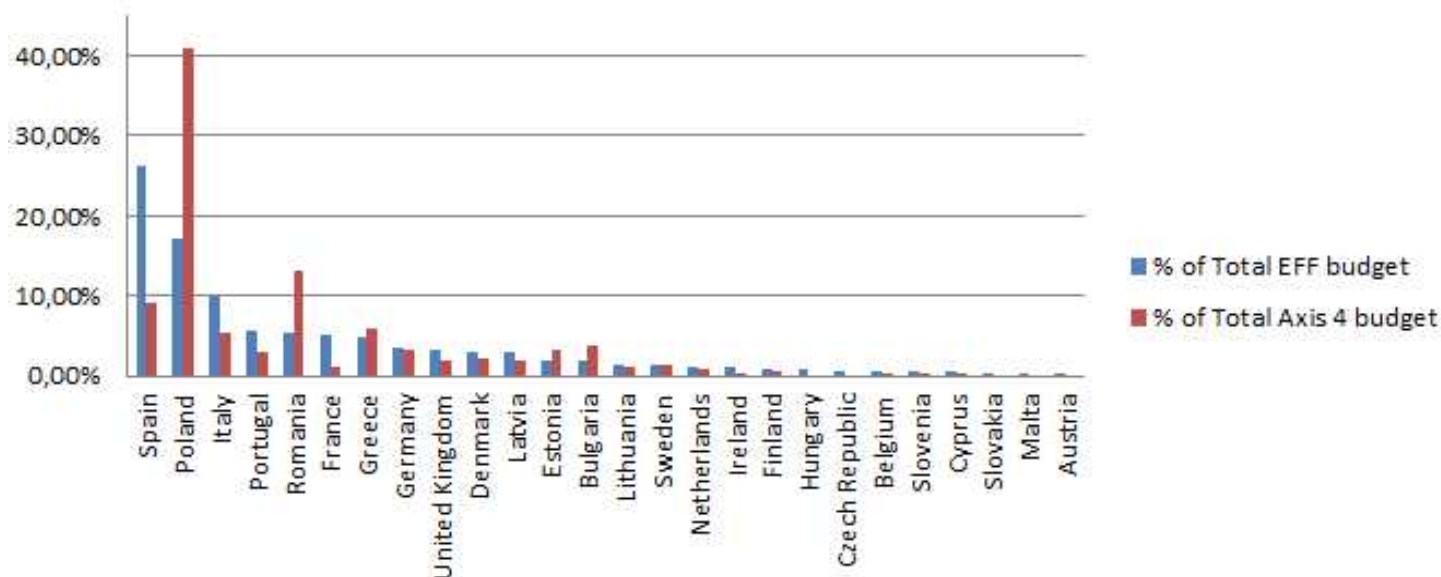


Source: FARNET website

Axis 4

- The EFF Axis 4 was highly concentrated in Spain and other southern European countries plus Poland.

Figure 4. Percentage of Total EFF and Axis 4 budgets per country 2007- 2013



Source: Interim evaluation of the European Fisheries Fund (2007-2013) and FARNET Website

II. Fishing related tourism activities

- The most common diversification into tourism is launching complementary activities to the fishing activities, such as:
 - **hospitality services, fishing tours, development of new infrastructure and services, activities related to the sea** and coastal areas; or neighbouring rural areas for inland fishing.
- Most diversification experiences to date are located in marine and coastal areas, but there is an emerging trend to diversify also in inland communities where river fishing is the main source of income.

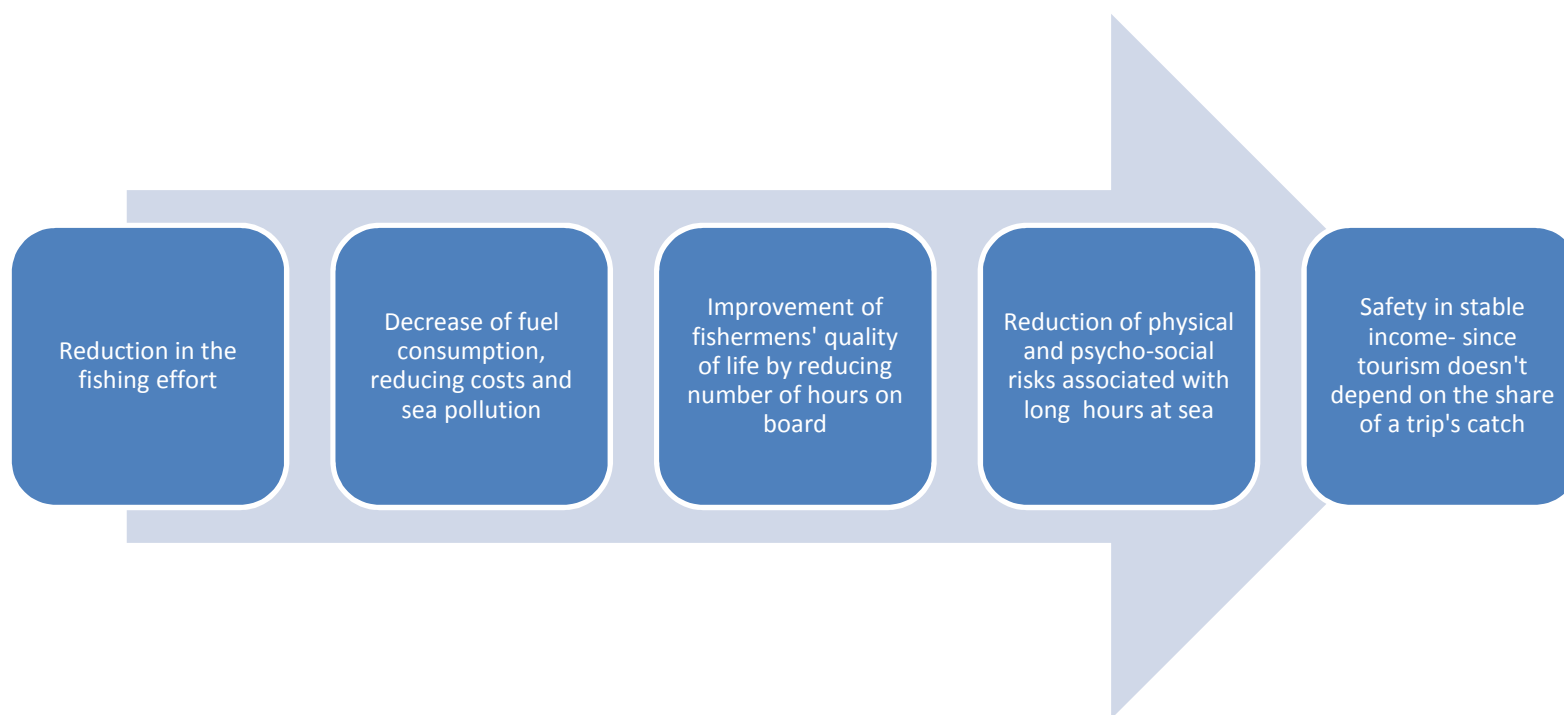
Fishing tourism

- In some regions also called *Pesca-tourism*: activities conducted by professional fishermen using their own fishing vessels.
- Fishermen have the opportunity to increase their core business activity, resulting in an increase in income.
- It also increases the **visibility** of fishing to the public, allowing greater appreciation of its value and nutritional aspects.



Fishing tourism

Benefits and “**casual-link**” chain analysis of fishing tourism activities:



Source: Authors, based on the Website of *pesca-tourism* in Catalonia, Spain, and similar activities in other EU countries

Fishing tourism

- Fishing tourism or *pesca tourism* is still not consistently defined across Europe, but there is still only an “**emerging**” legal and regulatory framework.
- In some Member countries there is little demand or interest in regulating the activity.
- “International directives should provide a common definition of *Fishing Tourism* and consequently of the overall *fishing activity*.”
 - Fishing tourism in Southern Europe - MAREMED, 2013

Recreational fishing

- Recreational fishing is fishing for pleasure or competition, and is a widespread activity across the EU and many other regions of the world.
- Some small fishing villages are well positioned in this area, and there are many success stories in the EU, but there are increasing **tensions with traditional fishermen** (European Parliament's Committee on Fisheries).
- Likewise a study by a CIEHAM/FAO study in 2008 highlighted that unrestricted recreational fishing can change the populations of target species, produce uninteresting by-catches, and can cause disturbance in natural habitats.

Recreational fishing

- Only a handful of countries have assigned budgets for support to recreational fishing, mainly co-financed by Axis 4 of the EFF; mostly in Bulgaria, Latvia, Lithuania, Poland, Romania and Sweden.



Marine tourism

- The International Coastal and Marine Tourism Society (ICTMS) defines coastal and marine tourism as: “recreational activities which involve travel away from one’s place of residence which have as their host or focus the marine environment and/or the coastal zone.”
- It includes many activities such as scuba-diving, snorkelling, wild-life observation, beach activities, visits to fishing villages or lighthouses, maritime museums and events, etc.
- These activities- part of the “**blue economy**”- experience the highest growth rates in the diversification of sea-based activities.

Marine tourism

- The European Parliament has recognized the growth tendency in the Report on "*Blue Growth*", stating that "the overall employment in the *blue economy* may exceed the estimated number of **7 million jobs by 2020**". For this reason, most of the Axis 4 budget are directed to activities involving this kind of tourism:



III. Best practice: *Pesca-tourism* in Catalonia (Spain)

The Fishermen's Organization of Catalonia and the DG of Fisheries and Maritime Affairs of the regional Government promoted pilot tours to evaluate the *pesca-tourism* activities, which convinced them of passing regional legislation.



Lessons learned / Best practices

- Carry experimental fishing trips first to see the benefits of the activity
- Involve different stakeholders in the trips and upgrading of the vessels
- Use Information and Communications Technologies (ICT- websites, etc.) to promote the activity
- Apply regional law if no national law covers this activity.

Best practice:

Inland fishing tourism impact analysis, Finland

- An impact evaluation model of fishing tourism was developed, based on time (length of stay), space (regional level) and number of trips made.
- While similar models are used for evaluating tourism overall, singling out the economic impact of fishing tourism as a single economic entity can prove challenging.
- Key requirements include: 1) a clear definition of a “fishing tourist”; 2) how to quantify the number of fishing trips made or days spent; and, 3) how to define the study area.

Best practice: Tuna Fishing festival in Cetara, Italy

- Tuna fishing represents the largest sector of the local economy; the town hosts a fishing festival every two weekends in July or August hosted by the Cetara Municipality and the Salerno provincial Tourism Office.
- The programme includes conferences and workshops on issues related to tuna fishing, some of them in the tuna vessels themselves.
- Evenings are dedicated to tasting the fish, listening local musical performances; the festival has been essential to maintain the tourism interest of this town.

Best practice: Marine tourism in Estepona, Spain

- “Marine Tourism Costa del Sol” agency is aimed to promote the traditional fishing industry and assist in the development of tourism-based activities and promotion.
- Tourists board the sailboats and are taught on-board how to prepare fish dishes while sailing across the Bay of Estepona. The agency also offers other fishing tours and recreational fishing activities.
- There are also guided tours to the neighbouring “Bioparc”, where children can learn about marine biology, fishing traditions and culture.

IV. Lessons learned:

1) Invest in infrastructure and resources

- Upgrading of the **fishing vessels** is key in the diversification into tourism activities, especially in the case of fishing tourism.
- Vessels should be adapted or renewed following strict safety guidelines; clean, modern and with a certain degree of comfort.
- Good transport infrastructure, proper accommodation, shops, restaurants and other facilities must be available, while public spaces (parks, lake-side or coastal areas) should be scrupulously maintained and litter-free.

Lessons learned:

2) Invest in Capacity building

- There has to be a trained **work-force** to service the new tourism activities; fishing families and other local villagers must acquire the necessary skills and knowledge.
- It is vital to create a **road-map** for those involved in the transformation, and structure an agreed work-plan.
- Superior quality of services must be achieved to differentiate the offer; a tourism awareness campaign for locals could also be necessary to improve the attitude towards outsiders.

Lessons learned:

3) Differentiate the offer

- Differentiation can be achieved by using the local **factors of competitiveness**, taking into account all available resources and through innovation in the service offer.
- Increasingly, tourism is being driven by a desire to learn, to discover new experiences and to add meaning to people's lives.
- Localities must try to develop a “**Unique Selling Proposition**” (USP) based on their historical or cultural characteristics; utilising both traditional media and new e-marketing techniques to convey the core values for the destination and motivate local residents.

Lessons learned:

4) Apply traditional and e-Marketing

- All local tourism information has to be available at all times in different formats.
- The locality has to study the characteristics and habits of the target segments, in order to achieve a cost-effective promotional focus and the best possible **marketing mix**.
- The world's rapidly-rising average age implies a growing market of people with higher discretionary income and available time to travel.
- Fishing localities can launch joint marketing campaigns with other destinations in the region- collaboration can yield mutual benefits.

Lessons learned:

4) Apply traditional and e-Marketing (cont.)

- A correct **balance between supply and demand** must be struck, especially in terms of infrastructure and hospitality resources; both a lack of availability or an over-capacity can create frustration for visitors and give a negative image.
- In these days of mass communications, news of bad tourism experiences spread very rapidly to potential customers (with websites such as TripAdvisor and many others).

Lessons learned:

5) Enforce gender mainstreaming

- Traditionally, women have been involved in complementary tasks to fishing, generally, their contribution is often "informal" and usually not remunerated.
- Directive 2010/41/EU covers the application of the principle of equal treatment between men and women in a **self-employed capacity**, and repealed Council Directive 86/613/ECC.
- As a EU priority, the gender perspective and equality of opportunities between sexes has been included in the European legislation on fisheries.

Lessons learned

5) Enforce gender mainstreaming (cont.)

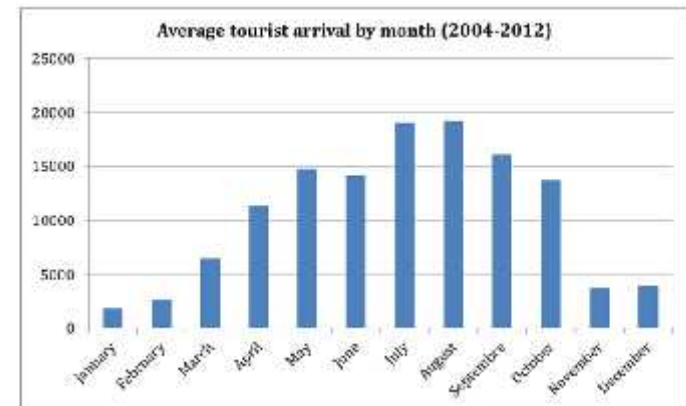
- Axis 4 of the EFF already provided assistance to women-promoted initiatives in fishing communities.
- Women can open simple restaurants serving fish, provide support to fishing tourism, organise guided visits, manage accommodation, or other new and innovative businesses.
- The current trend is to support women not only to help their husbands in the fishing tourism activities, but in **initiating and managing** the tourism-related businesses.

Lessons learned:

6) Address Seasonality

- Tourism is highly seasonal in Europe, lasting normally from April to October.

Average monthly tourist arrivals in Būsum, Germany (average of 2004 to 2012 period)



- There are many methods to extend the tourism season; organising **festivals and gastronomic events, promoting local tourism in the off-peak months, developing museums, thematic villages**, etc.
- The village or locality has to take into account the seasonal decline in visits and how it will affect local employment during the low season, and develop creative/innovative ideas.

Lessons learned:

7) Involve the scientific community

- Diversification of fishing activities into tourism creates a number of conflictive issues regarding the environment and the species.
- There should be a set of guidelines to follow when dealing with diversification towards activities involving wild-life, based on scientific principles and studies.
- It is important to involve the scientific community in these studies: **universities, specialised marine schools, agencies and research centres, specialised NGOs**, etc., to analyse and plan the protection of the local wildlife and/or biodiversity.

Lessons learned:

8) Enforce environmental care and biodiversity

- Although tourism can in most cases benefit local communities, it can also threaten its natural and environmental resources.
- Environmental consciousness will continue to increase across the EU, and this will result in a higher demand for “**clean destinations**”, in which nature and the local population play a prominent role.
- The new tourism activities should plan to educate tourists and locals on the importance of environmental conservation, ensuring the sustainability of such activities for future generations.