



**DIRECTORATE-GENERAL FOR INTERNAL POLICIES**  
**POLICY DEPARTMENT B: STRUCTURAL AND COHESION POLICIES**

**FISHERIES**

**PERSPECTIVES FOR THE DEVELOPMENT  
OF TOURISM ACTIVITIES  
RELATED TO FISHING**

**IN-DEPTH ANALYSIS**

This document was requested by the European Parliament's on Committee on Fisheries.

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## **LINGUISTIC VERSIONS**

Original: EN

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Manuscript completed in March 2014.  
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**IN-DEPTH ANALYSIS**

## **Abstract**

Diversification of fishing communities in the EU into tourism activities has been successfully achieved in various coastal and marine areas. Fishing tourism, also referred to as *pesca-tourism*, and other marine and coastal activities related to the “blue economy” provide new sources of income to local families and communities. Investment in infrastructure, including the fishing vessels for fishing tourism as well as related hospitality and harbour upgrades, in capacity building, in differentiating the services offer, and in pro-active marketing and promotional campaigns are some of the key factors in these successful diversification efforts.



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## LIST OF ABBREVIATIONS

<b>CIEHAM</b>	International Centre for Advanced Mediterranean Agronomic Studies
<b>CFP</b>	Common Fisheries Policy
<b>EMFF</b>	European Maritime and Fisheries Fund
<b>ESPON</b>	European Observation Network for Territorial Development and Cohesion
<b>EP</b>	European Parliament
<b>EU</b>	European Union
<b>FAO</b>	Food and Agriculture Organisation of the United Nations
<b>FARNET</b>	Fisheries Areas Network
<b>FLAG</b>	Fisheries Local Action Groups
<b>GDP</b>	Gross Domestic Product
<b>ICTMS</b>	International Coastal and Marine Tourism Society
<b>MAREMED</b>	Maritime Regions Cooperation for the Mediterranean
<b>NEF</b>	New Economics Foundation (UK)
<b>USP</b>	Unique Selling Proposition





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## EXECUTIVE SUMMARY

### Background

The present 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, and the lessons learned for the European Maritime and Fisheries Fund (EMFF) for the 2014 – 2020 period. It includes selected case studies of successful diversification initiatives in various EU countries, frequently with the support of EU-funded programmes, which would have potential for replication or enhancement of their impact with the new EMFF.

There is a need to diversify in the fisheries sector mainly because it is considered to be a high-risk economic activity, but also due to the over-dependency of some communities for their livelihood and income. The need to gain new sources of economic activity is compounded given the rising costs of fishing and the accelerated depletion of resources. Diversification of fishing communities into tourism is an attractive option, since fishing communities have typically many natural and cultural assets which appeal to tourists. In the EU, tourism and its derivative services provide approximately 12% of total employment. It is a steadily growing sector, notwithstanding its high seasonality. This seasonality makes it very relevant for fisheries communities as a diversification option, as it allows them to continue with the fishing activities and complement them progressively with tourism-related ones, without having to make a dramatic switch or sudden replacement of their traditional source of income.

One of the most common experiences in diversification is launching complementary activities whereby the fishermen and their families continue to earn their main income through fishing activities, but also include other types of activities in their everyday lives. These new activities are frequently related to tourism in the broad definition of the term, from hospitality services to offering fishing tours, to the development of infrastructure and services with new activities related to the sea, coastal areas, or even neighbouring rural areas for inland fishing. Most diversification experiences to date are related to marine and coastal areas, but there is an emerging trend to diversify in inland fishing communities where river fishing is the main source of income as well. Inland fishing shares some of the problems of sea fishing, such as depletion and pollution, as well as over-dependence on the activity and cyclical catches.

Fishing tourism or *pesca-tourism* are the terms commonly used across the EU for tourism activities which are conducted by professional fishermen using their own fishing vessels. Normally, the fishing tours last from a few hours to several days if accommodation can be provided by the same fishermen or by related local tourist operators. The most important benefit of this type of fishing diversification is that the fishermen have the opportunity to increase their core business activity, resulting in an increase in income. It also exhibits and promotes the value of their activity, making it more visible to the general public, while introducing the tourists to the variety and complexity in the sector, and allowing a greater appreciation of the value and nutritional aspects of fishing.

Another type of tourism activities related to fisheries diversification is coastal and marine recreation, which can include various activities such as scuba-diving and snorkelling, wildlife observation, beach sports activities, visits to fishing villages and lighthouses, maritime museums, events and many more. These activities have experienced the highest

growth among the different types of fishing diversification, and are considered part of the “blue economy”, which provides value-added services to sea-based activities. The European Parliament has recognized their contribution in its Report on “Blue growth - Enhancing sustainable growth in the EU's marine, maritime transport and tourism sectors” (2012/2297(INI), stating that “the overall employment in the *blue economy* may exceed the estimated number of 7 million jobs by 2020”.

## **Aim**

The aim of this Note is to outline the possibilities and lessons learned in diversification of fisheries into tourism-related activities. It also reviews a list of successful experiences, focusing on selected best-practice examples which seem to be relevant to the diversification of the fisheries sector. It addresses the chain of benefits of the diversification and suggests the launching of pro-active initiatives for developing fisheries-related tourism and harmonising and improving its legislative and regulatory framework.

## **Key findings**

Diversification of fishing communities into tourism-related activities is a growing trend in the EU as well as world-wide. There are many successful examples of different types of diversification within the EU which provide lessons and possible support for efforts to be launched in the near future in other communities.

For example, fishing tourism or *pescas-tourism* initiatives which offer tours to tourists on board the same fishing vessels (with possibly additional hospitality and entertainment activities) have been piloted in various communities across the EU, and are considered a key diversification effort. Other relevant diversification initiatives, such as combining recreational fishing and other coastal and marine activities, e.g. water sports and visits to local attractions, also extend across coastal areas. Combined with hospitality and selected entertainment related to the community's artistic or handicraft tradition, the aforementioned activities provide a more comprehensive local tourism offer.

Lessons learned from successful diversification examples highlight the importance of supporting the improvement of local infrastructure, including upgrading fishing vessels when used for tourism activities, as well as investing in capacity building of the local communities; assisting with the design of a differentiated offer, and with the implementation of pro-active marketing and promotional campaigns.

## **Infrastructure**

The upgrading of fishing vessels is an important aspect when considering the support of diversification into tourism activities, especially in the case of fishing tourism and recreational fishing. The vessels should be adapted or renewed following strict safety guidelines, and with facilities which can accommodate the tourists and their families in clean, modern conditions, inclusive of a certain degree of comfort. The same recommendations are applied to the general infrastructure of fishing localities and their surroundings; the infrastructure must address tourists' needs if success is to be achieved. There has to be a good transport infrastructure to access the locality and proper accommodation to host the visitors; the shops, restaurants and other catering facilities must be clean and welcoming. The streets and public spaces, such as parks, lake-side or coastal areas, should be well-maintained and litter-free.

### **Capacity building**

Fishing families and local residents must acquire the necessary skills and knowledge to handle incoming tourists and their widely differing requirements. Traditional fishermen need to adapt to the service orientation of the tourism sector, which can prove difficult for older populations. Capacity-building strategies must take into account the different offerings of the locality, create a road-map for those involved in the transformation, and structure an action plan which sets the foundation for the new economic activity.

There also has to be a viable and well-trained work-force available to service the new tourism activities. Normally, the personnel needed will come from within the same locality or surrounding local villages. Moreover, the support of the central, regional and local governments is important, not only for investing, but also providing a forum for sharing best practices and experiences. Aspects such as good accessibility supported by infrastructure improvements offering a high standard of services supported with capacity building exercises, must be considered when designing a differentiated offer of new tourism activities and related services.

### **Differentiation**

Historically, tourism has been a very competitive activity, where different towns or villages vie with each other to capture demand in key source markets. For this reason, it is important to keep in mind the potential for differentiation of the specific community when drafting the road-map aiming to diversify from fishing to tourism activities. Differentiation can be achieved by maximising the local factors of competitiveness, taking into account all of the available resources of the locality, and above all, through innovation in the tourism product or integrated offer. It is important to develop a "Unique Selling Proposition" (USP) based on authentic historical or cultural characteristics, and to utilise both traditional media and new e-marketing techniques to promote the USP.

### **Marketing**

Close collaboration with regional and national tourist boards will be essential to access their specialised marketing skills. So too will be the development of a wide range of information and reservation points, both physical and web-based. Nowadays, virtually all tourists research the areas which they plan to visit beforehand: they check the quality of accommodation, often using the user-generated review websites, restaurants, transport infrastructure, goods and services, etc. All of the above information has to be available at all times and in various formats. It is important to research the characteristics and habits of the target market segments for each activity, in order to achieve cost-effective promotional focus and build the best possible marketing mix. There must also be a correct balance between supply and demand, especially in terms of infrastructure and hospitality resources, since either lack of availability or over-capacity can create frustration for visitors and project a negative image of the locality or the activities offered. In a time of mass communication, news of bad experiences can spread very rapidly to a wide range of potential customers.

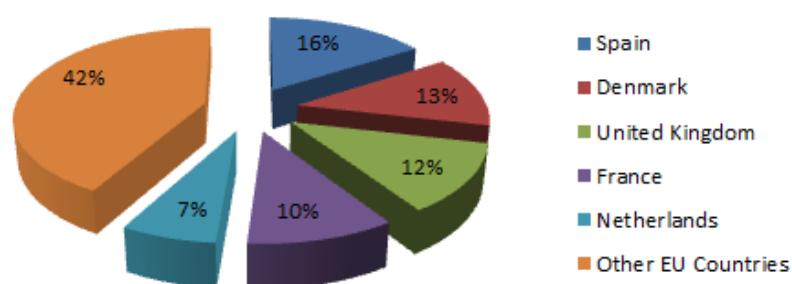


# 1. BACKGROUND INFORMATION ON THE FISHERIES SECTOR

## KEY DATA

The EU fisheries sector is facing various socio-economic challenges and constraints which derive from the over-investment of the last decades, cost increases, reduction of resources, lack of preservation of the fish stock, and the loss of market share to imports. Even though fishing is a relatively small economic activity at EU level (0.06% of total GDP of the EU, and 1.4% of global fishing activity worldwide), at local level it shows strong dependency, reaching on average around 11% of the local economic activity in selected locations. Fisheries production is concentrated in Spain, Denmark, the United Kingdom, France and the Netherlands, which, combined, represent 58% of total EU fisheries production (Figure 1).

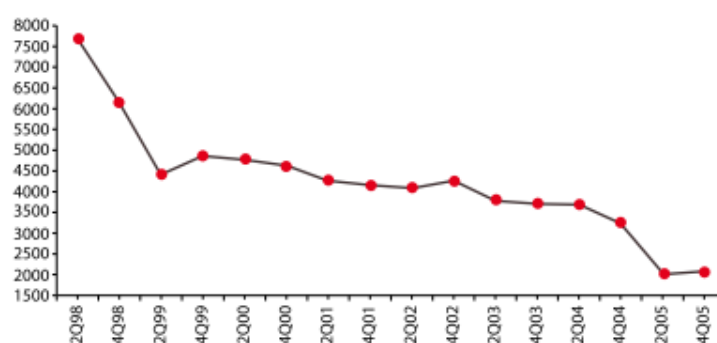
**Figure 1: Total EU Fisheries Production - All Fishing Areas (2009)**



Source: EUROSTAT.

Employment in the fishing sector is not very high in the EU (around 400 000 persons in total are estimated to earn a living in the sector); nevertheless, it can be of paramount importance in local regions or communities, and in some cases it is the sole activity of a community. In the last decades, the number of fishermen has decreased at a rate of 4% to 5% annually. In Scotland for example, the workforce has been reduced by half; in Estonia, the number of people employed in the sector decreased by almost 70% since 1998 (Figure 2).

**Figure 2: Employment in the fish processing industry in Estonia, calendar quarters from 1998 to 2005**



Source: Estonian Fisheries Strategy 2007-2013.

## **1.1. European Fisheries Fund**

The EU has supported the sector with specific financing for fisheries diversification into tourism-related since the beginning of 2000. In the 2007-13 period, EU funds for the fisheries and aquaculture sector were channelled through the European Fisheries Fund: EUR 4 304 million was allocated in this period, implemented through Axis 4. The funding allocations for each Member State were assigned according to a number of parameters, such as the size of the sector, the number of fishermen, and the degree of adjustments needed for sustainable continuity of the activity.

The Commission proposed an allocation of over EUR 6.5 billion for the 2014-2020 period, which complements and supports the reform of the Common Fisheries Policy (CFP), defined and extensively negotiated for the past two years; the European Maritime and Fisheries Fund (EMFF) has run in parallel with the implementation of the reformed CFP from the beginning of 2014.

## **1.2. The need to diversify**

There are several points to consider as to why there is a need for diversification of the fisheries sector. According to the New Economics Foundation (NEF) in the UK, there is a high risk of over-dependency on a single industry for local economies, especially during hard times beyond the control of the community itself, such as economic cycles or natural catastrophes. One highlighted point is the rising costs related to fishing. NEF has established that “the amount of effort and fuel needed to land one ton of fish is higher than it needs to be, and higher than it would be if stocks were at a sustainable level. It is estimated that UK trawlers invest 17 times more effort than they did 18 years ago to land an equivalent catch”<sup>1</sup>. These findings are confirmed by many other studies and organisations across the EU.

In order to improve livelihoods in communities dependent on the fisheries sector, it is important to devise strategies which can help diversify the economy of the local area, provide additional jobs and income to families, and help stabilise the declining profitability and employment of the fisheries sector.

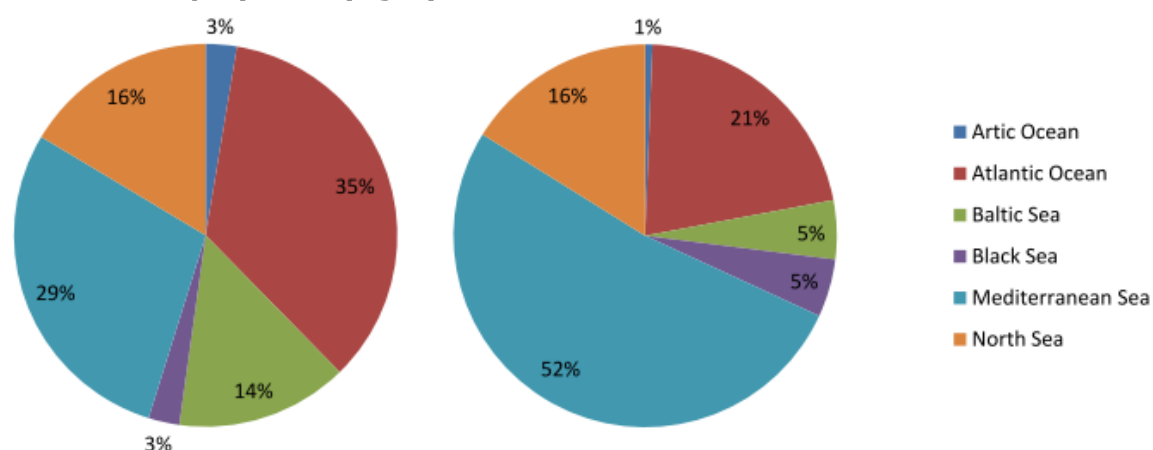
One such strategy is to diversify into tourism-related activities, since fishing areas typically have many natural and cultural assets which can appeal to tourists. According to EUROSTAT, the number of embarkations and disembarkations at ports of the EU in the year 2010 was 395.6 million, of which only 2-3% represented passengers on cruise ships. As for accommodation including hotels, campgrounds and other types of tourist accommodation in 2009, nearly three-fifths (60%) of the 28.1 million bed-spaces available were in coastal regions. Tourism and all its related services provide approximately 12% of total EU employment (Figure 3).

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<sup>1</sup> New Economics Foundation – Ocean2012. *Fish Dependence -2012 Update*; London, United Kingdom, page 22 Retrieved from [http://s.bsd.net/nefoundation/default/page/-/files/Fish\\_dependence\\_2012.pdf](http://s.bsd.net/nefoundation/default/page/-/files/Fish_dependence_2012.pdf).



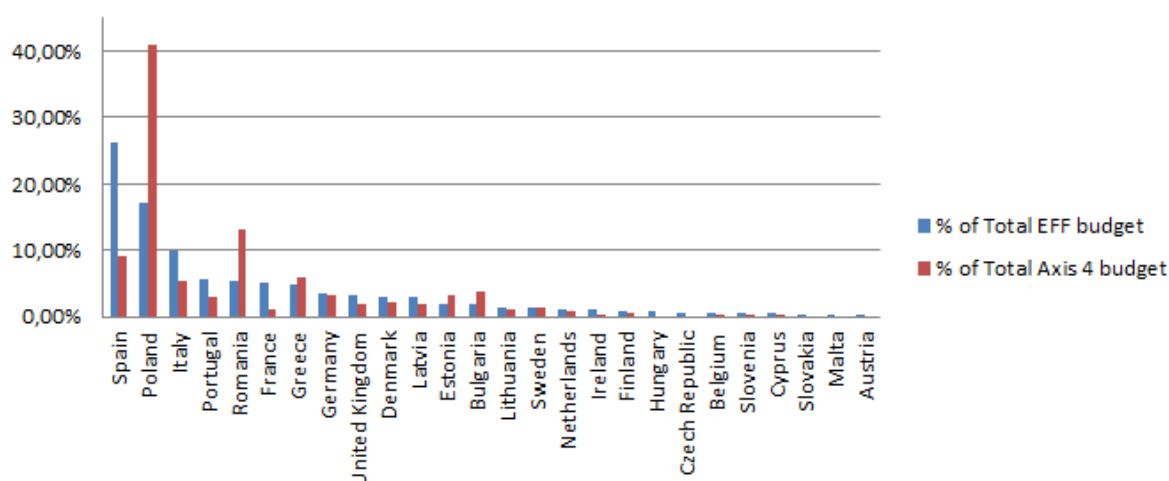
**Figure 3: Structure of total fisheries employment (left) vs. total tourism employment (right) in the EU**



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

The diversification of fisheries-dependent communities and families into tourism activities has already been analysed and supported by several projects financed by Axis 4 of the European Fisheries Fund during the 2007-13 period (Figure 4). Axis 4 has funded various projects managed by FLAGS (Fisheries Local Action Groups), supervised by the Support Unit for the European Fisheries Areas Network (FARNET). The EMFF will spend relatively more on the development of local fisheries communities, especially in spurring their innovative efforts, such as the diversification into tourism-related and other productive activities.

**Figure 4: Percentage of Total EFF and Axis 4 budgets per country**



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



## 2. FISHING RELATED TOURISM ACTIVITIES

One of the most common aims of tourism-related diversification is to offer complementary activities in which the fishermen and their families continue to earn their main income through fishing, but additionally offer services for tourists in certain seasons or throughout the whole year. The following are the most important categories of these diversification efforts of fishing communities into tourism-related activities:

### 2.1 Fishing tourism

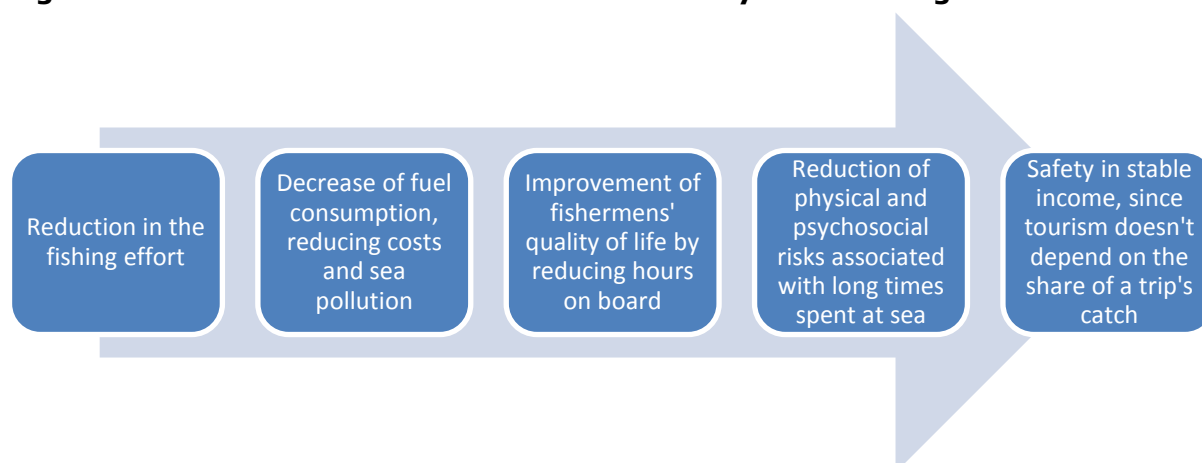
Fishing tourism, also referred to in southern Europe as *pesca-tourism*, refers to the combination of fishing in winter with teaching tourists coming to the area how to fish during the summer months. It is one of the pioneering experiences in the diversification of fishing into tourism-related activities and has now spread across the EU. Its origins can be dated to the late 1980s in Italy, more specifically in Sicily. The tourism activities are conducted by professional fishermen using their own boats or other vessels, and last from a few hours to several days if accommodation is provided by the same fishermen or related local tourist operators.

The fishing tourism offer may include:

- Excursions in professional fishing vessels
- Learning about the fishing activity and fishing gear
- Lunch on board during the activity
- Game fishing
- Discovering the marine environment and its biodiversity

Because of the activities involved, there are several benefits that can be obtained. The most important benefit is that fishermen have the opportunity to increase their business activity, resulting in increased income. Fishing tourism also helps demonstrate and promotes the value of their fishing activities, making them more visible to the general public and introducing tourists to the variety and complexity of the sector. It not only helps tourists learn about the everyday life, habits, and customs of fishermen in their communities, but also informs them about the sea and the different species that live in it.

Fishing tourism is an activity with numerous “externalities” besides the additional direct income to the fishing families. Shown below is a representation of the “causal-link” chain of benefits for this type of diversification activity:

**Figure 5: Benefits and causal-links chain analysis of Fishing tourism activities**

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

Nevertheless, fishing tourism and *pesca-tourism* are still not well defined across Europe; moreover there is only an “emerging” legal and regulatory framework. Few countries in the European Union have defined or incorporated fishing tourism into their national legislation or regulation: France and Italy are the most advanced with full legislation at national level, with various others having different degrees of advancement in proposed legislation or now considering it. Similarly, few Member States have passed legislation or regulation at regional or local level; for example, French regions are currently adapting its legal framework after a pilot project in the Var; the local FLAG has estimated that some fishermen increase their incomes by up to 70% when they take tourists in their vessels and show them how they go about their work (EC FARNET cases, 2012).

In other Mediterranean countries such as Spain, Portugal and Greece, the legal framework at regional and local level is only emerging for this type of tourism. Nevertheless, there has been an interest for improving the legal situation in several regions. In Spain for example, the only region to regulate this type of tourist activity is Catalonia, which has passed a regional law which covers “pesca-tourism” as well as other diversification activities of fishing communities, such as aquaculture and shell fishing. See the Annex for a more detailed description of this example of fishing diversification into tourism in Catalonia.

Several Northern European countries, such as Estonia, Lithuania and Finland, in turn, only allow fishing tours under strict conditions, and require adaptation of the vessels, safety instruction and certification of the changes. In several other European countries, it is not even possible to take tourists on fishing vessels, unless they are specifically dedicated to tourism activities only.

Finally, in some other Member States, it seems that there has been no perceptible interest or demand for fishing tourism activities, and therefore there is little motivation for the authorities to change their legal framework regulating the activity.

At international level, the Food and Agricultural Organization of the United Nations (FAO, 2005 and 2013) analyses and compares fisheries and aquaculture legislations of most countries in the world, but there is no explicit mention of professional fishing vessels used for tourism purposes. There is obviously extensive regulation of recreational fishing vessels, but they fall under a different licensing and regulatory regime.

As a conclusion of the review of the differing legal and regulatory regimes across the EU, it is clear that a legal harmonisation and common regulation of this type of activity is needed in the short term. A recent study of fishing tourism in Southern Europe (MAREMED, 2013) clearly states: "A more exhaustive and appropriate legislative framework for the development of fishing tourism activities in the Mediterranean is thus required at the Regional, State and European Community level. International directives should also provide a common definition of *Fishing Tourism* and consequently of *fishing activity*."

## 2.2 Recreational fishing

The Food and Agricultural Organization of the United Nations (FAO) defines recreational fishing as "fishing for reasons other than to satisfy essential nutritional needs and where fishing products are generally not sold or otherwise traded on markets". In other words, it means fishing for pleasure or competition, and is a widespread activity across the EU and many other regions of the world.

There are normally three ways to practice recreational fishing:

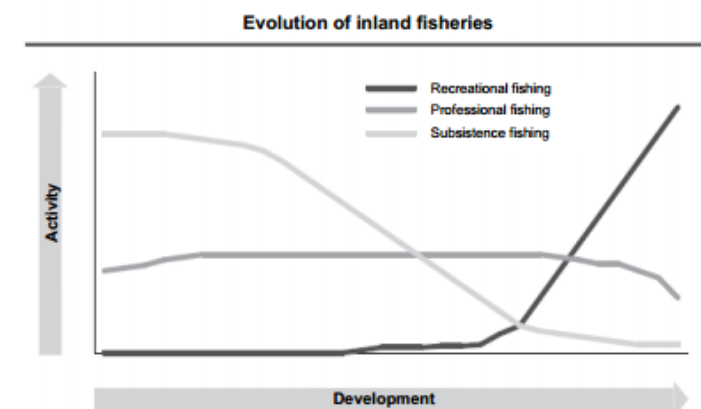
- **Big-game fishing**, as its name implies, targets big fish for their sporting qualities. It is normally carried out from local ports, and the boat is normally motor-powered, so as to be able to overpower larger fish.
- **Angling** is the art of fishing with one or various lines and waiting for a fish to take the bait. It can be carried out from a boat or a fixed point on land, and is the most widespread method of sport fishing, since it can be done in lakes and rivers as well as in the sea.
- **Spear-fishing**, is a method of fishing that involves catching fish with a spear. It can be carried out while free-diving, snorkelling or scuba-diving. It is also a fishing activity that can be performed in the sea or in lakes and rivers.

In recent times, small fishing villages have been targeted for recreational fishing and other leisure activities all around the world. The fishing villages are often well positioned to take advantage of this, and there are many success stories of fishing villages which have adopted recreational fishing as a means of diversification.

Even considering that it has by and large been a high growth sector, there are several challenges to be addressed before putting it into practice. The European Parliament's Committee on Fisheries has in the past noted that "there is increasing tension between inshore fishermen, who fish for a livelihood, and recreational fishermen who are competing in the same physical space for the same populations of fish and crustaceans".

It can also affect the environment, according to a CIEHAM/FAO study (2008):

- It can change the populations of target species.
- It produces by-catches, where low-value or uninteresting species are also caught besides the targeted ones.
- It can cause disturbance of the habitat caused by over-exploitation of the fish.

**Figure 6: Predicted shifts in the types of inland fishing**

Note: The depicted situation is thought of as a prototypical trend across much of the world.

Source: FAO (2010).

Source: FAO report, 2012.

Only a handful of countries have hitherto assigned budgets for support to recreational fishing, mainly with co-financing by Axis 4 of the EFF, especially Bulgaria, Latvia, Lithuania, Poland, Romania and Sweden. Other countries have tried to study the impact of recreational fishing on marine and inland tourism, such as Finland's case below, albeit reporting modest results as to the direct economic impact:

### Box 1: Inland Fishing Success Story

#### SUCCESS STORY

#### Inland Fishing Tourism Impact Analysis, Finland

In Europe in general, there has been little research relating to the direct economic impact of fishing tourism. Most of the research focuses on qualitative rather than quantitative impacts; an example of this being the improvement in the quality of life that local residents experience when diversifying into tourism activities.

Nevertheless, one can find certain initiatives that try to measure the economic impact of fishing tourism whether at local or regional level. One of these initiatives is the expenditure method of the Nordic model, which is applied to fishing tourism research in Finland. This model is based on three dimensions: time (length of stay), space (regional level) and trips made. This pattern is adopted from Hall's model (Hall, 2005).

The model argues that when tourists stay more time in a place, they tend to spend more. Accordingly, the focus should be to encourage them to stay longer in the area, which can be done by increasing accommodation facilities and other services. Overall tourism data, at local, regional and national level, and the mobility of tourists (number of trips made) must be taken into account.

While this can be done for tourism as a whole, singling out the economic impacts of fishing tourism as a single economic entity to study its impact can prove to be challenging. The first requirement is a clear definition of a "fishing tourist". The case-study states that "a fishing tourist is a person who has obtained a fishing licence and travels temporarily to a fishing location which is outside his/her permanent place of residence in order to fish".

It also states that another important aspect that needs to be carefully noted is how to quantify the number of fishing trips made or days spent; also, how to define the study area.

After applying the economic model to the Iijoki River region in Finland, the study concluded that the economic impact of fishing-tourism in 2006, while positive, was modest compared to total tourism receipts, bringing a "direct additional" income of EUR 1.2 million from purely fishing tourism-related activities in the area (compared to the region's total direct income from tourism of about EUR 36 million). Thus, a "success story" in both quantitative and qualitative terms - with an emphasis on the latter.

**Source:** Kauppila P. and Karjalainen T.P., 2012 (Bibliography).

## 2.3 Marine tourism

The International Coastal and Marine Tourism Society (ICTMS) defines coastal and marine tourism as those "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 and snorkelling, wildlife observation, all types of beach activities, visits to fishing villages and lighthouses, maritime museums and events, and others.

These activities have experienced the highest growth rates amongst the different types of diversification from fishing, and are considered part of the "blue economy", which provides value-added services to sea-based activities. The European Parliament has recognized this in the aforementioned Report on "*Blue Growth*", stating that "the overall employment in the *blue economy* may exceed the estimated number of 7 million jobs by 2020". This reason explains the concentration of most of the Axis 4 budget on activities involving this kind of tourism.

Fishermen take the role of captain of their vessel in these tourism activities. The tourists are passengers, engage in the activity with or without an instructor, and there is no fishing involved. Scuba diving or snorkelling is one example. The fishermen take a group of tourists out to sea or on the lake in their boat, and may provide in some cases refreshments on board.

One growing trend in tourism is **wild-life observation**, which is part of eco-tourism. Whale and dolphin watching have become very popular in the last decade. They are normally considered to be passive and non-intrusive activities when carried out from the shore. But, if not done correctly, they can impact the behavioural patterns and instincts of the mammals when approached by a large number of tourist boats. For this reason, fishermen have to be very cautious and well-trained in order to offer this kind of service.

In some countries such as Ireland, there are specific regulations that the operators have to follow in order to offer wildlife watching tourism from their vessels, such as observing a strict code of conduct, demonstrating knowledge of environmental issues, supplying data on what they see on each trip, and abiding by the local Conservation Plan. In Spain, some regions have regulations for whales and dolphin watching: for example, the Andalusian Environmental, Agriculture and Fishery regional government department has passed regulations for the preservation of the environment, knowledge gathering, physical requirements and necessary skills, pathologies, safety standards and materials to be used,

pursuant to article 29 of Decree 20/2002. Other Member States (e.g., Finland) don't regulate this type of marine observation activity, mainly because there is little record of whales or dolphins in their waters.

There are also activities focused on arts, heritage and culture which could attract different categories of visitors, including from abroad, but which tend to appeal more to domestic tourists. These kinds of activities include the fishermen and their families, which are usually involved in the organisation and staffing of festivals, workshops, museums, and thematic villages, helping their children learn about their own community, discovering and adding value to their local assets, and creating a sense of pride in their own history and heritage.

One example of this type of activity are **maritime museums**, which can provide an inside view on the history and traditions of a given region or area, thus promoting it and attracting local and foreign visitors. This is also a good way to unite the local community, encouraging it to participate, while also teaching the younger generation to take pride in the importance of their heritage. Many of these museums offer permanent exhibitions, and are oriented towards promoting sustainable fishing and the respect of the eco-systems.

### **Box 2: Fishing Museum Success Story**

#### **SUCCESS STORY**

##### **Fish festival and museum in Freest, Germany**

Freest is an old fishing village located 10 km north of the Peene River in Mecklenburg-Western Pomerania in Germany. The village has a small fishing harbour which can host up to 30 boats engaged in coastal and deep-sea fishing. Tourists can also find and enjoy fresh fish in the port, and can reach neighbouring towns like Greifswald or Kröslin by ferry.

The village offers a fascinating insight into the customs and heritage of the local fishermen through the "Freester Heimatstube". It exhibits historical fishing tools, carvings, and fishing carpets. Hand-knotted carpets with colourful marine motifs made by the locals are available for purchase. It also hosts a small manufacturing company which makes fishing rugs by traditional methods and offers them for sale.

Moreover, the village hosts a fishing festival on the first weekend of August, including boating, fish specialties, amusement rides, fireworks, a small market, dance artists and entertainment for the family among other activities. Fish in all its variants plays an important role during the festival; and those who wish can go out in small boats for rowing trips.

In the evenings, the organizers install a big party tent with dancing and live music. The big fireworks display on the beach the highlight of the festival. In 2013, the village planned for 30 000 visitors for the festival.

**Source:** Website [inselusedom.de](http://inselusedom.de) and related documents (see Annex Best Practice Case 1).

Another option to attract tourism is by hosting fishing events or festivals. In many cases, the diversification activity consists of offering local marine products, whereby local families take the fresh catch and cook it using recipes learned from their forefathers. This activity also fosters local economic development and reinforces social interaction among the local



and tourists groups involved. Some of these fishing events also include singing and dancing by local groups, parades of typical costumes and other entertainment activities.

**Box 3: Fish Festival Success Story**

**SUCCESS STORY**

**Fishing festival of the Tuna in Cetara, Italy**

Cetara is an Italian town in the province of Salerno in Campania in southern Italy. Tuna fishing has represented the largest sector of the local economy since the early 1970s. With a fleet consisting of thirteen vessels equipped for deep-sea tuna fishing and around 180 persons employed, fishing is normally practiced in the warmer months of the year, from early May to early July.

The town hosts a fishing festival over two weekends in July or August, normally after the fishing season has ended. It involves different stakeholders under the patronage of the Municipality and the Provincial Tourism Office of Salerno.

The programme is very varied and involves conferences and workshops on issues related to tuna fishing. Some of these workshops are carried out on the actual ship searching for tuna, and others are delivered by politicians and professionals.

The evenings are dedicated to the culinary aspect of the event, where it's possible to taste several recipes cooked by local caterers, later eaten in port. It is also possible to attend local musical performances, based on popular songs of local tradition.

**Source:** Website Cetara.asmenet.it and related documents.

Another activity related to arts and culture derives from the concept of **thematic villages**, a term coined in Austria in 2000. It concentrates its efforts on displaying regional and local strengths, focusing on villages which have suffered a decline of their primary economic activity such as agriculture and fishing.

Thematic villages are centred on providing a unique experience, immersing visitors in the selected theme while allowing for their active participation. Thus, the villagers need to be well-trained and the appearance of the village adapted in such a way so as to create the required atmosphere.

As the villagers immerse themselves in the selected theme, this stimulates an increase of creativity and motivation, as well as pride and self-confidence. Also, the identity of the village is reinforced, creating a sense of satisfaction, security and safety from which new ideas arise. Since almost all local groups are involved in these events, they share a common cause, providing them with a sense of purpose while strengthening the overall community integration, at both local and regional level.

**Box 4: Marine tourism Success Story**

**SUCCESS STORY**

**Marine tourism in Estepona, Spain**

Sonia and Pedro come from a traditional fishing family in the town of Estepona, in the Malaga province of Spain. In 2010, after careful research into the sector, they decided to complement their traditional fishing business with other activities. They formed the “Marine Tourism Costa del Sol” company, which has aimed to promote the traditional fishing industry and assist in the development of tourism-based activities and promotion, such as:

Workshops and gastronomy:

Tourists board the family’s sailboat and are taught to prepare fish dishes on-board, while sailing through the Bay of Estepona. Also, they have the opportunity to sample traditional fish recipes in front of the Church of the Virgin of Carmen in the local port.

Marine tourism for schools:

Different schools teach about fishing with a team of instructors and guides. Most of the activities offered include games and songs. Also, there are guided tours to the neighbouring “Bioparc”, where children can learn about marine biology, the world of fishing, their traditions and culture.

Fishing culture and tradition:

The family offers many tours such as catching “flying fish”, the marina tour and the “fishermen’s route” where tourists can follow fishermen and observe the different fishing methods used by the vessels.

All of these experiences are also offered as packages for tourists, including other possible complements such as kayak expeditions in and around the marina at Estepona.

**Source:** Website [turismomarinero.com](http://turismomarinero.com) and related documents.

Identifying particular traits of local identity is in most cases the first step in a tourism-product brand development, as it helps develop new and exciting activities for tourists, while creating additional value for the village. In some cases, reinforcing the local identity is the common denominator for improving the well-being of the locals. The development of a specific cultural topic or theme can also bring a recovery of assets in the locality, contributing significantly to an increased quality of life for its inhabitants. Although it is important to brand the theme of the new touristic product so as to create higher economic value for the region, it is also extremely important to maintain the authenticity and identity of the village or locality.

**Box 5: Marine tourism Success Story**

**SUCCESS STORY**

**Tourism in Pāvilosta, Latvia**

Once a small fishing village, Pāvilosta is now a port city in Latvia, located in the west of the Saka River, 240 km north from the capital Riga. The town is very popular among windsurfers and kite-boarders. Its history, culture and environment are presented at the local Pāvilosta Museum.

The town population has managed to integrate tourism into its everyday life, and now prides itself on good infrastructure, sightseeing experiences, and a range of activities which aim to attract local and foreign tourists.

Since the fishing port was mainly used for vessels and yacht servicing, a marina was built to facilitate the diversification into tourism. Today, tourists can charter a cruise around Pāvilosta, or relax at a holiday home, a hotel room or a campsite near the seaside.

The activities which the town offers are:

- Rides on traditional wooden fishermen's boats.
- Sea trips on fishing boats, and if fish is caught, it can later be smoked at the "Fisherman's farm".
- A kayak school, where the tourist can hire a kayak and explore the seashore.
- Canoeing on the nearby rivers.
- Recreational fishing, where one can rent a vessel and fishing equipment.
- TOPCAT catamaran hire, where beginners can also hire an instructor. There is also a Sailing School to learn about catamarans.
- A Surf Club, which offers windsurfing, kite-surfing and surfing lessons, and all types of surfing equipment rentals.

**Source:** Website Pavilosta.lv and related documents.



### 3. LESSONS LEARNED

#### Invest in infrastructure and resources

The fishing vessels are important when considering support for diversification into tourism activities, especially in the case of fishing tourism (*pescas-tourism*) and recreational fishing. The vessels should be adapted or renewed following strict safety guidelines, and with facilities which can accommodate the tourists and their families in clean, modern conditions with a certain degree of comfort.

The same recommendations can be applied to the general infrastructure of fishing localities and their surroundings. The local infrastructure must address a series of tourism needs if success is to be achieved: there has to be good transport infrastructure to access the locality, there must be proper accommodation to host the visitors, and the shops, restaurants and other facilities must be clean and welcoming. The streets and public spaces, like parks, lakes, etc., should be scrupulously maintained and litter-free.

Today, travellers are much more experienced, informed and sophisticated than in the past. They are more self-confident regarding their needs and rights; for tourism localities to prosper, they need an increasingly critical attitude to quality, and a high price-quality ratio. Destinations which do not meet acceptable standards will not succeed, and negative feedback will swiftly follow via travel and evaluation websites. Still, the latter can be an advantage for fishing towns and villages diversifying into seaside or inland tourism: today's more experienced travellers are increasingly critical of artificial settings, and favour greater authenticity and local culture. It can be posited that mass tourism seaside resorts will continue to lose upmarket tourism business to unspoilt rural and coastal destinations, if these are well developed and maintained.

#### Box 6: Infrastructure support Success Story

##### SUCCESS STORY

##### Zygi's Marina, Cyprus

Zygi is a small village located in the south of Cyprus between Limassol and Larnaca. It is home to many professional and amateur fishermen, and is also famous for its fine seafood restaurants, which are mostly supplied by the local fishing fleet. Most of the fish is consumed at the local seafood restaurants, while the rest is distributed in the domestic market.

For some time now, Zygi and many other Cypriot villages have attracted a large number of returning erstwhile emigrants and retirees. For this reason, the Cypriot Department of Fisheries decided to build a new marina, so as to accommodate pleasure craft (yachts and speedboats), besides the local fishing fleet. The marina accommodates today around 220 berths and offers a number of related marine services.

Today, the town has diversified its offer to include scenic tours, wildlife watching and fishing tours, attracting vast numbers of tourists and retirees. Infrastructure investment in the marina is perceived to have changed the image of the town, which continues to attract returning migrants and foreign tourists alike.

**Source:** Zygimarina.com Website and related documents.

## **Capacity building**

Fishing families and other local villagers must acquire the necessary skills and knowledge to handle incoming tourists and their widely differing requirements. Traditional fishermen need to adapt to the service orientation of the tourism sector, which is often hard for the older population. Basic customer care courses should be made available not just to the fishermen, but to all local residents who are likely to come into contact with visitors. Capacity building strategies should take into account the different offerings of the locality, and create a roadmap for those involved in the transformation, structure a work plan, and establish the foundations for new economic activity.

There has to be a viable work-force available to service the new tourism activities. Normally, the personnel needed will come from within the same locality or surrounding local villages. Moreover, the support of the central, regional and local governments is important, not only for investment, but also in providing a forum for best practices and the sharing of experiences. Aspects such as accessibility, supported by infrastructure improvements, and the quality of services provided, supported by capacity building, must be addressed when designing a differentiated offer of activities and services.

Moreover, a long-term tourism awareness campaign for locals is to be recommended, as the arrival of increasing numbers of tourists is seldom welcomed by all residents. Some need to be convinced of the benefits, both economic and social, which tourism can bring. This process should start early and preferably in school.

## **Differentiation**

Historically, tourism as an activity is very competitive, where different localities vie with each other to capture the most promising segments in the key source markets. For this reason, it is important to always have differentiation in mind when drafting a road map to diversify fishing to tourism activities. Differentiation can be achieved by using new factors of competitiveness, taking into account all of available resources of the locality, and above all, through innovation in the tourism offer.

It is important to develop a “Unique Selling Proposition” (USP) based on authentic historical or cultural characteristics, and to utilise the traditional media and new e-marketing techniques to promote it. In the present-day virtual sphere, the importance of destination brands is increasing, so as to give customers the guarantees that intermediaries previously provided, and to become “attraction beacons” in a myriad of competing websites. The challenge is to identify authentic and convincing core values for the destination, and to unite local residents behind these.

Increasingly, tourism is being driven by a desire to learn, to discover new experiences and to add meaning to people’s lives. This trend is supplementing the traditional purpose of travel as an opportunity to rest, relax and rejuvenate. People are no longer satisfied with just visiting monuments and taking photos. They also want experiences which nourish their mind and/or body. These “experiential” tourists are looking to interact with people and to engage in creative or active pursuits. The fishing tourism product fits this profile perfectly, and is a clear opportunity to attract new tourists, provided the required conditions are met.

## Marketing

Close cooperation with the regional and national tourist boards will be essential to access and apply their specialised domestic and international marketing skills. So too will be the development of a wide range of information and reservation points, both physical and web-based. Nowadays, virtually all tourists investigate the areas which they plan to visit beforehand; they check the quality of accommodation (often using the user-generated review websites), restaurants, transport infrastructure, goods and services, etc.; all information has to be available at all times in different formats. It is important to have researched the characteristics and habits of the target market segments for each activity, in order to achieve cost-effective promotional focus and to build the best possible marketing mix.

The so-called “best-ager tourists” are a key market segment for the development of this type of product. In many large, industrialised countries, the rapidly rising average age means a growing market of people with more discretionary income and available time to travel. Catering to these shifting demographics requires changes in existing travel products and marketing. The “best-ager” tourists are much healthier and more active than in the past, and they are looking for interactive and unusual experiences. Today, tourists aged 55 and over travel farther away from home, stay away longer, include two or more destinations in a trip, engage in more activities, travel with only one other household member, and spend more per trip than average tourists. They are the core of the *experiential tourism* movement, and need to be offered a variety of experiences and places to visit. Therefore, consideration should be given by the fishing localities to launch joint marketing campaigns with other destinations in the region, as such collaboration will yield mutual benefits and reinforce each offer.

A correct balance between supply and demand must be struck, especially in terms of infrastructure and hospitality resources, since either lack of availability or over-capacity can create frustration for visitors and give a negative image to the locality or the activities offered. In the present time of mass communication, news of bad experiences can spread very rapidly to a wide range of potential customers.

## Gender Mainstreaming

Women have always played an important role in the fisheries sector, both professionally and personally, by developing complementary activities to fishing. Traditionally, women have been involved in complementary tasks to fishing such as shellfish collection, aquaculture, fish sales, manufacturing and mending nets, as well as administrative tasks related to the fishing activity. Generally, their contribution is often “informal” and usually not remunerated.

The contribution of women in self-employed activities is recognized in the Directive 2010/41/EU on the application of the principle of equal treatment between men and women engaged in an activity in a self-employment capacity, which repealed Council Directive 86/613/ECC. The principle of equal treatment between men and women therefore applies to self-employed workers, and compliance with it should enable the number of women practicing this type of activity to increase. This principle shall also bring greater recognition to the work carried out by spouses assisting self-employed workers, as this is the most common status of fishermen across Europe.

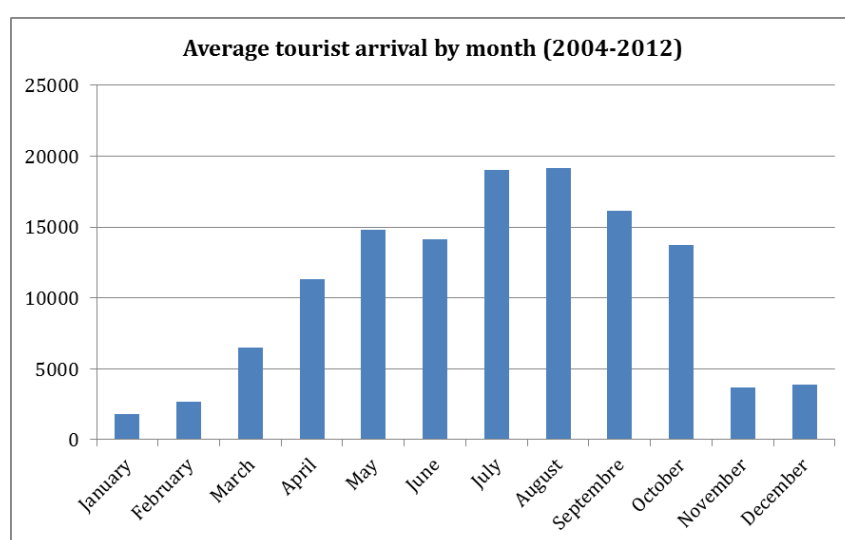
Gender equality is a priority objective of the European legislation and the incorporation of the gender perspective and principle of equality of opportunities between sexes has also been included in the European legislation on fisheries. As regards EU support to this principle, Axis 4 of the EFF already provided assistance to women-promoted initiatives in fishing communities, offering opportunities to women of fishing families, whether spouses, partners or daughters in fishermen families, in the diversification of fishing activities and in obtaining extra income.

Women can contribute greatly to helping families diversify into tourism activities with activities such as: opening simple restaurants serving fresh fish, providing support to fishing tourism vessels, organizing guided visits to aquaculture facilities, managing accommodation, and other new and innovative businesses. The current trend is to support women not only to help their husbands in the fishing tourism activities, but also in initiating and managing the complementary tourism-related businesses themselves.

### Seasonality

Tourism is highly seasonal in Europe, normally lasting from April to October. There are many ways to extend the tourism season, such as organising festivals and gastronomic events, promoting local tourism instead of foreign tourism in the off-peak months, and developing museums, thematic villages or other types of activities that are not seasonally dependent. The village or locality has to take into account the seasonal decline in visits and how it affects local employment during the low season, and help develop creative/innovative solutions to deal with seasonality.

**Figure 7: Average monthly tourist arrivals in Büsum, Germany (average of 2004 to 2012 period)**



Source: Website buesum.com and related documents.

### Involvement of the scientific community

Diversification of fishing activities into tourism brings with it a number of issues regarding the environment and the species that it hosts. There should be a set of guidelines to follow when dealing with diversification towards activities involving wild-life, and this should be based on scientific principles and studies. This can be done by involving the scientific community, namely universities, specialised marine schools, agencies or research centres



in neighbouring cities, or funding organizations for the analysis and protection of the local wildlife and/or biodiversity.

### **Environmental care and biodiversity preservation**

Although tourism can in most cases benefit local communities, it can also threaten its natural and environmental resources. There have been many cases across Europe where tourism development damaged the environment, not necessarily by destroying the habitat of wildlife, but in most cases simply by disturbing it. In the case of the fishing industry, and the activities that it involves, it is the marine life and coastal ecology which are most threatened.

This is particularly important in view of the fact that the number of “tourists with an environmental conscience” is rapidly growing. “Fair-Trade” and other social practices have also become an issue for consumers, and “ethical tourists” need to be convinced that they are benefitting, not harming, the environment and the host community. Tourism is becoming more responsible, meaning that greater account needs to be taken of the negative effects which it can bring, alongside the positive ones. Environmental consciousness will continue to increase, and this will result in a higher demand for “clean destinations”, in which nature and the local population will play an increasingly prominent role.

As mentioned before, in the case of marine life, the approach of a large number of tourists’ boats can impact the behavioural patterns and instincts of mammals or fish, if not done properly and with the adequate safeguards. It is important to take into account that all tourism activities should be planned in such a way as to educate tourists and locals about the importance of environmental conservation, ensuring the sustainability of such activities for future generations.

Also, when building docks, marinas or ports, it is important to take into account that they should not harm the environment or adversely affect aquatic ecosystems. Different negative impacts from dock or port construction are well-known and documented, and mostly related to changing the patterns of the marine ecosystem. The docks and the vessels tend to introduce chemicals into the water and alter marine currents and tidal flows. Therefore, an environmental assessment must always be carried out before building or re-modelling a dock, pier or port; so as to understand what type of impact there will be on the ecosystem, both during the construction phase, and once completed.



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## **ANNEX: DETAILED EXAMPLES OF DIVERSIFICATION FROM FISHING TO TOURISM ACTIVITIES**

### **Good Practice (EU) 1: Fishing Festival in Freest (Germany)**

#### **Country**

Germany

#### **Brief historic review**

Freest is an old fishing village located 10 kilometres north of the Peene River in the German Mecklenburg-Western Pomerania region. The village has a small fishing harbour which can host up to 30 boats, usually engaged in coastal and deep-sea fishing. In the port, tourists can also find and enjoy eating or shopping for fresh fish, and reach other fishing towns such as Greifswald or Kröslin by ferry.

The village offers a fascinating insight into the customs and heritage of the local fishermen through the "Freester Heimatstube" museum. It shows historical fishing tools, carvings, and fishing carpets, while hand-knotted carpets with colourful marine motifs made by the locals are available for purchase. It also hosts a small manufacturing company which knits fishing rugs with traditional methods and offers them for sale.

Moreover, the village hosts a fishing festival every first weekend of August, which includes among other activities boating, fish specialties, amusement rides, fireworks, a small market, dance artists and entertainment for the family. Fish in all forms have an important role during the festival; also, more adventurous patrons can go out in small boats for fishing or rowing. In the evenings, the organizers install a big party tent with dancing and live music, while the highlight of the festival is the big fireworks displayed on the beach. In 2013, this village prepared for 30 000 visitors for the festival which supplements the villagers' main fishing income.

#### **Fisheries related tourism offerings (from list)**

- Fishing museum
- Fish festivals and gastronomy
- Boat tours or excursions

#### **Initiatives from the fisheries sector or fishing communities**

- The fishermen run and provide all hospitality and tours as well as help organise the festival and support the museum activities.

#### **Recent changes to support tourism offerings (last 10 years)**

- Upgrade of the port and marina

### **Lessons learned / Best practices**

- Remodelling of the marina to include space for speed boats
- Remodelling of the infrastructure

### **Comments**

Freest is a town that has integrated the annual fishing festival into the local community. They organize well-known musical groups to play in the festival, and arrange activities for the whole family. This has led to a year-on-year increase of tourists up to the estimated 30 000 in 2013, with an approximate doubled family income during the month of the said festivities.

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<http://www.thurow-freest.de/>



## Good Practice 2 (EU): Pesca-tourism in Catalonia (Spain)

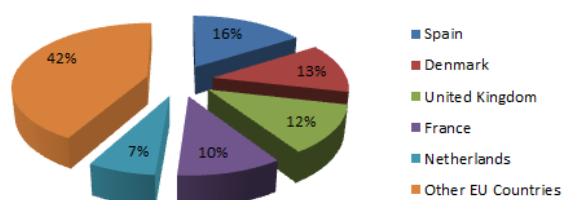
### Country

Spain

### Brief historic review

Fishing in Spain has always been very important for the coastal communities, also due to the fact that Spain has been the European country with the highest fisheries production:

**Figure 8: Total Fishery Production - Total all Fishing Areas (2009)**



Source: EUROSTAT.

The initiative to introduce fishing tourism, or *pesca-tourism* as it is locally known, as a means of diversification from fishing was due to the crisis in which local fishermen suffered increasingly from a restriction of fishing areas, lack of qualified personnel, increasing operating costs, low sale prices, and increasing seasonality of the catch.

These issues led the fisheries sector in the autonomous region of Catalonia to devise alternate solutions such as *pesca-tourism*, which had previously made a positive impact in Italy. For this purpose, numerous projects and seminars were launched to analyse this type of tourism, studying how it could help local fishermen and make a positive economic and social impact on the sector.

Nevertheless, the Spanish Fishing law 3/2001 of 16 March did not mention the activity known as *Pesca-tourism* due to several factors: it was not defined in the previous legislation, the vessels were not usually allowed to take non-fishermen on-board, and the insurance and embarkation regulation for fishing vessels did not extend sufficient coverage to the tourism activity.

After several years of studies and seminars, the autonomous region of Catalonia decided to take action and legalised the activity in 2012, after a series of positive pilot experiences along their coastal areas. This has opened a door for other autonomous regions in Spain to follow with similar regional legislation and regulation of the activity, and for the national legislator to include the activity in national law, as is already the case in France and Italy.

### Fisheries related tourism offerings

- Commercial fishing
- Fishing boat tours or excursions
- Working harbour tours

### **Initiatives from the fisheries sector or fishing communities**

The Fishermen's Organization of Catalonia, together with the DG Fisheries and Maritime Affairs of the Government of Catalonia promoted several experimental tours in order for the authorities to evaluate first-hand the *pesca-tourism* activities, which convinced them to pass the relevant regional legislation.

### **Recent changes to support tourism offerings**

- Changes in fishing vessels to accommodate tourists
- Changes in local law to include pesca-tourism among tourism activities

### **Available indicators**

Since the law was approved recently, no specific impact analyses have been carried out to date on the value-added and increase in income from this activity.

### **Opportunities for future projects**

This pilot activity in Catalonia opened opportunities for other regions to replicate the experience of Catalonia, regulate and promote it: for example, the Valencia and Balearic islands regions have followed course, with draft regional legislation being passed or in advanced preparation, while other regions in the North and South are developing their own drafts.

### **Lessons learned / Best practices**

- Experimental fishing trips to see the benefits of the activity
- Involvement of the different stakeholders in the trips and investment in the upgrading of the vessels
- Use of Information and Communications Technology (ICT)-websites- to promote the activity
- Application of regional law when faced with the absence of national law to cover this activity.

### **Comments**

- Harmonisation of the definitions and regulations needs to be initiated at national level, so as to avoid a Member State developing differing regional legislations and regulations.
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### **Source of data and Bibliography**

- Spanish law 3/2001 of 16 March 2001
- Website <http://www.pescaturisme.com>

## Detailed Good Practice 3 (non-EU): Fishing eco-tourism in South Africa

### Country

Gansbaal, South Africa

### Brief historic review

Gansbaal (Goose Bay or Gans Bay) is an old fishing town in South Africa. Although fishing is considered to be the primary economic driver of the town, it is slowly being replaced by a marine tourist activity: diving with the great white sharks. The town also provides wildlife watching, mainly the marine "Big Five" (whales, great white sharks, dolphins, penguins and seals), whether from land, sea and air. Whale-watching activities are carried out from June through December of each year.

There are many towns in South Africa which offer the experience of diving with great white sharks; however, according to biologists, the bay of this city has the distinction of attracting large concentrations of this type of species, more than in other coastal cities of the country. This is due to the high concentration of seals and other marine species, which form part of the diet of the great white shark.

The tourists are fitted with wetsuits and then lowered into the water inside a metal enclosure fixed on a side of the boat. There has been controversy surrounding this practice, since the sharks are attracted due to sensing a mixture of fish (mainly tuna) and oil, so people argue that they may attack bathing tourists in the area if the procedure is not managed correctly.

This type of tourism has also helped to study this species of shark, since tourism operators offer scientists the option to accompany them on trips. Scientists can later track the sharks, and study their everyday habits, especially the way they interact with the cages and the people inside. They can also propose other ways to interact with the sharks and their habitats, which provides an alternative to the cages.

Besides the shark watching, the town has developed a complementary tourism offer which ranges from horse-back riding to fishing tours (as in *pescaport* in Southern Europe), fish festivals, etc.

### Fisheries related tourism offerings

- Wildlife watching
- Horse riding
- Hiking trails
- Fishing tours
- Fish Festivals

### Recent changes to support tourism offerings (last 10 years)

- Infrastructure support
- Website / promotion
- Awareness campaigns

### **Lessons learned / Best practices**

Enhance the main tourist attraction of the village (white shark-watching in this case) with offers of complementary fishing and rural tourism, which increase the income and prolong tourist stays.

Another best practice is involving scientists in tourism activities, which not only allows to observe species in their natural setting, but also provide alternatives and tips on how to preserve their habitat, while imposing fewer changes on the usual habits of wildlife.

### **Source of data and Bibliography**

<http://www.encounter.co.za/article/222.html>

<http://www.gansbaai.com>

<http://newswatch.nationalgeographic.com/2012/01/17/is-tourism-good-for-south-africas-great-white-sharks/>

<http://gansbaaiinfo.com/info/>