

TOURISMED

Fishing Tourism for a Sustainable Development in the Mediterranean area

3.5.2 Partnership Workshop Report

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Introduction

In the framework of the TOURISMED Project, the Partnership is committed to develop a common Mediterranean model for the development of the fishing tourism by sharing the good practices. The common business model should be then adapted to the local context through specific analysis and the full consultation of the local stakeholders.

This is the key role attributed to the ACTIVITY: 3.5 – Exchange information for testing activities, which involves all the project partners, under the coordination of Haliéus.

The Activity includes different tasks:

- A **Partnership workshop** to create the framework of the model. The Workshop was held in Marseille on July 2017, and at this occasion the partnership tried to figure out the model, on the basis of the results of the feasibility studies implemented.
- Organization of **Local focus groups** with stakeholders in each territory involved in the project, with the aim to assess how to link the model to local needs.
- A **Study visits**: Each partner implementing the pilot will select and send in another country that is testing the model 4 stakeholders balanced between fishing associations and tourism operators.
- Transnational workshop with public and private stakeholders to gather feedbacks for refinement.

This document Reports the outcomes of the Partnership Workshop, trying to outline the first elements of the Business Model to be tested, adapted and implemented in the different target country.

The discussion of the Partnership Workshop has been leaded by PROMIMPRESA, which used the Business model format “Canvas” for stimulating the brainstorming from the partners, also on the basis of the results of

the Feasibility study drafted by each partner and then harmonized at Mediterranean Level by the University of Pireus.

This Report will represent and detail the stream of the discussion held in Marseille on 11th July 2017. In particular, the Table below, corresponding to the canvas business model format, reports faithfully the notes taken during the Workshop thanks to the contribution of the various partners. Those concepts are then developed in the following paragraphs that detail the approach proposed for the different aspects of the Business Model: Customer Segments, Value Proposition, Channels, Customer Relationships, Revenue Strams, Key Activities, Key Partners, Key Resources and Structure of Costs.

KEY PARTNERS	KEY ACTIVITIES	VALUE PROPOSITION	CUSTOMER RELATIONSHIPS	CUSTOMER SEGMENTS
<p>For the marketing: Tourism Agency and Tourism operators (Hotels & Restaurants)</p> <p>For synergies: Fishermen Associations and Cooperatives; Public institutions (local department of tourism, FLAG);</p> <p>For authorizations: Public institutions (port authorities/coastal guard); Certification bodies (e.g. RINA/Bureauveritas)</p>	<p>Teaching professional fishing techniques</p> <p>Boat Trips</p> <p>Cooking (directly on board or on land or through agreements with restaurants)</p>	<p>Unique tourism experience</p> <p>Education on fishery and fishery cultural heritage</p> <p>Discover places accessible only by boat or known only by fishermen</p>	<p>Use of social media (our activity is high usable on social media for visibility).</p> <p>Info material in more languages.</p>	<p>Tourists looking for a different experience. They can be local or international tourism (some differentiation in terms of sale channels and customer relationships)</p> <p>Tourism operators/travel agency can become customers buying directly the packages.</p>
	<p>KEY RESOURCES</p> <p>Compulsory professional fishing license and fishing tourism license.</p> <p>Promotional material</p> <p>Itinerary guides</p> <p>Interpretation panels</p> <p>Info material on traditional fish receipts</p>		<p>CHANNELS</p> <p>Website/Web portal Travel agency/operators</p> <p>Cooperative office</p> <p>Direct selling from the fishermen.</p>	

COST STRUCTURE Fuel Maintenance cost of the vessel and gears Crew of the vessel Insurances Vessels adaptation and equipment (safety equipment) Information material.	REVENUE STREAMS Ticket sale to tourists Sale of packages to travel agencies Potential integration with sale of fish conserves or even gadgets on the fishery tradition. Potential Sponsorships (local shops on fishery/restaurants).
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CUSTOMER SEGMENTS

For whom are we creating value? Who are our most important customers?

Bottom of Form

The point of entry of the Canvas model is the analysis of the **Customer Segments** that we are targeting. One enterprise can decide to target more than one single Customer Segment, but it should explicit the differences between the segments in order to be aware of its implication in the other dimension of the Model (for instance the communication channels to be used for reaching that target, or the type of activities, etc).

In our case, we decided to target Tourists who are looking for an experience different from the mainstream ones. They can be locals (Nationals or even from the same Region) or internationals.

The future refinement of the model will allow performing a clustering of the customers such as Couples, Families, Groups of youths or business groups (among others) with their specific needs. Nevertheless, now there is the need to keep a wide perspective that can be inclusive of the situation in the different Mediterranean Regions (also considering legislation, dimension of the vessels, etc).

It emerged that, in theory, the tourism agencies or operators could become customer segments by themselves, in case they intend to buy packages of fishing tourism activities (for instance a hotel could decide to buy the package for n°xx tourists and resell it to its hosts). For simplification, the fields of this business model will be developed only considering the single Tourists as final customers.

From a different perspective, the fishermen themselves can be considered as customers of the service of business support for fishing tourism activities, but it would require to modify completely the perspective of this model. Therefore, this scenario is not considered in the model.

VALUE PROPOSITION

What value do we deliver to the customer? Which one of our customer's problems are we helping to solve? What bundles of products and services are we offering to each Customer Segment? Which customer needs are we satisfying?

Having defined the type of Customer Segment targeted, we should make in evidence the additional value that we provide them, considering their needs.

It is clear that at the current stage, the fishing tourism cannot be targeting mass tourism (considering its costs, vessels dimensions, etc.), so that it should intercept the needs of tourists who are looking for something different from the mass, and are willing to have a deeper experience of the territory, a sort of *experiential tourism*.

This is the value that the Model will propose them: a deeper *experience* of the territory. In terms of deeper knowledge of the social and cultural traditions

(fishing and cooking ones), as well as a deeper knowledge of the environment of the territory.

So that the fishing tourism service should focus on offering something that could not be offered by any other touristic experiences, such as the possibility to eat fish caught under their eyes or the possibility to visit areas that are accessible only by boat (including protected areas, where allowed by local authorities), valorizing the deep knowledge of the coast that only a fishermen has.

CHANNELS

Through which Channels do our Customer Segments want to be reached? How are we reaching them now? How are our Channels integrated? Which ones work best? Which ones are most cost-efficient? How are we integrating them with customer routines?

The selection of the channels for communication and selling is a critical point to reach the customers.

As first, it is to be defined who is selling the ticket. It emerged from the feasibility analysis that the provision of the service is more performing when it is operated through **cooperatives** or associations of fishermen. This is because having more vessels offering the service in cooperation has the following advantages:

- 1) Allows for ensuring different options to the customers (vessels of different dimensions for instance);
- 2) Allow to welcome bigger groups by dividing them on more than one vessel (one of the elements suggested by the feasibility studies is that the tourism operators often cannot offer the service to groups because of the low number of hosts allowed on board of one single vessel).
- 3) Gives the possibility of ensuring the service in more days (avoiding the risks connected to the availability of the single vessels and its owner/crew);
- 4) Gives higher visibility and offers economy of scale (in the administration services, including ticketing).

Therefore, the ticketing could managed directly by the single fishing enterprise or by the cooperative. In the last case, the office of the cooperative could operate the direct selling.

It should be clarified that is not likely that a tourist visit an area only for the fishing tourism itself. On the contrary it is more likely that the tourist is already in the area, or the area is in the middle of an itinerary (such as Palermo – Cefalù), and the fishing tourism service “intercept” the customer. For this reason it is crucial the networking with the other tourism operators in the area. Therefore, for widening the marketing channels, it is crucial to involve the local actors having more direct contact with tourists: the **Tourism agencies** (and the local tourism information offices). Agreements should be established with both actors for providing information materials (leaflets, etc) and for allowing them to collect the reservations obtaining a fare for the selling service. Each reservation should anyway pass through the cooperative (or the single fishermen) for confirming the availability. For boosting the “experiential” side of the service and the customer relationship, it could be an asset the spreading of the marketing material also through the operators (**restaurants, hotels or even fishmongers**) who normally buy the fish from the cooperative/single fishermen. In this way, the customers could be interested to “discover” and “experience” the origin of the fish that he buys, by making a

fishing tourism experience¹. Among the different operators, the hotels are those more likely to be involved also in the ticketing network, with agreements similar to the ones established with the tourism agencies (to a minor extent also restaurant could be interested in the scheme).

Aside from the physical selling channels, which still play a central role in the target areas, the model should pay a particular attention to the use of the web as a key marketing channel. From one side, it gives visibility to the fishing tourism activities offered, from the other side, it gives possibility for establishing automatic reservation systems which allow to the customer to reserve (and buy) on-line and facilitate the management of the reservations. The project Tourismed will provide the target groups with a **web-portal** for this purpose. The web-portal will be integrated at the Mediterranean for taking advantage of the network, but it will offer to each fishing tourism operator the use of the on-line ticketing the service through which the reservations can be managed.

CUSTOMER RELATIONSHIPS

What type of relationship does each of our Customer Segments expect us to establish and maintain with them? Which ones have we established?
How are they integrated with the rest of our business model? How costly are they?

The service offered is very likely to be a one-off service. It is likely that the majority of the costumers will realize the fishing tourism on that single vessel only once in their life, while they could be hosted again in the same hotel or they will eat again on the same restaurant. Nevertheless, also in this model, the relationship with the customer remain very relevant for several reason:

1. In this kind of experiential tourism, the personal relationship with the customer is core part of the service offered.
The dialogue between the fishermen and the tourist is fundamental, for ensuring the transfer of the knowledge (fish species, fishing traditions, gears and stories, environment, etc) as well as the safety information. So that a major problem which could arise is the issue of the language for foreign tourists. A solution could be in the production of interpretative panels and leaflets (plasticised to be used on board), explaining at least in two languages selected elements on the itinerary, the territory, the fish species (and may be how to cook them), the fishing gears and of course the safety information. In any case acquiring the basic elements of foreign languages (English and/or French) would be an asset for the vessels targeting foreign tourists.
2. In this typology of service, the customer is the most important vehicle for attracting future hosts.
In these terms, it results relevant the use of the social media. In fact, during a fishing tourism activity many moments could be highly attractive to be photographed and posted on social media.
Each fish tourism enterprise should have a simple social media account (primary Facebook, potentially Instagram) where posting picture of the fishing tourism activities, under consent of the participants, possibly tagging them and using specific “Ashtags” which are developed at the Project level for boosting the networking potentialities. Moreover, the networking dimension, give the fishing tourism experience of a customer in one Country,

¹ In Italy some successful cases exists on the Collective Purchase Groups (GAS) whose members decided to have fishing tourism experiences on the vessels from which they purchase fish throughout the year.

stimulate the realization of the fishing tourism also in the other Countries. It was suggested the hypothesis of having a sort of “Passport” (paper based or digital) of fishing tourism where a customer could get the “visa” (certification) of the experience in one country, and decide to replicate it also in one or more other countries trying to collecting as much “visas” (certificates) as possible. This is eased by the fact that all the areas of the project are highly touristic.

3. For a particular segment (local/regional tourists), the fishing tourism activity could be integrated with the rest of our business activities. Meaning that the local tourist could be or become customer of the direct selling of the fish products of the fishing enterprise. In this case, the business relation is long term, and the fishing tourism becomes a tool for valorising the fish product (fresh or processed) of the single enterprise or of the cooperative.

The customer relationship starts already from the moment of the booking. For these aspects consider the chapter on the “Channels” which include on-line and direct customer relationships.

Different could be the relations with some particular segments, such as schools or groups organized by tourism operators. In those cases, it is possible and needed to establish other forms of long-term agreements/relationships.

REVENUE STREAMS

For what value are our customers really willing to pay? For what do they currently pay?

How are they currently paying? How would they prefer to pay? How much does each Revenue Stream contribute to overall revenues?

The main source of revenues from the starting of the fishing tourism activity comes from the selling of the tickets. The pricing strategy strongly depends on the structure of costs (which will be analysed in the following chapters). In fact, the presence of high costs of fuel, insurance, working hours, etc, force us to fix prices which are higher than those of alternative activities (such as the ticket for an amusement park). Therefore, we must focus on adding value to the experience rather than racing the price to the bottom. In this terms, the offering of the meal by cooking of the fish caught (fish dishes are considered having high value) seems to be central for giving value for the price paid by the customer.

The overall costs of the fishing day is to be split among the number of tourists on boards. The lower number of tourists we can host, the higher should be the price (reaching even 100€ per person). Therefore, lower number of tourists on board demands for adding even more value to the service (pick-up service, better quality of drinks, gadgets, etc).

As additional source of revenues, it can be explored the possibility to sell at the end of the tour some fish products (small conserves which can be easily transported) which are produced by the fishermen or by the cooperative. On the other hand it should be considered that the fishermen carrying out the fishing tourism activity is not allowed to sell to the market the fish caught during the fishing tourism activity. When the tourist is local (or at least living in houses in the touristic areas), he could get part of the catches for cooking them in the very next days. Anyway, it is crucial that the fishing activities are as much as possible sized to the quantity of fish needed for cooking during the trip (also considering the discards ban, which will be in force for all species from 2019).

It could be also explored the possibility of selling - directly or through partnership with local shops - some souvenirs linked to the fishing tourism activity experienced (vessels reproductions, crafts made of dismissed nets, etc). Finally, during the brainstorming, a final suggestion arose concerning the possibility to get additional revenues from sponsorship partnerships (with shops, restaurants, etc).

KEY ACTIVITIES

What Key Activities do our Value Propositions require? Our Distribution Channels? Customer Relationships? Revenue streams?

The key activities proposed in our fishing tourism modes, should be:

- Transfer the knowledge of professional fishing (gears, species, social aspects, etc) and knowledge of the territory. The transfer of knowledge can start from a briefing at the beginning of the trip and then follow the different moment of the itinerary, allowing to live and “touch” the work of a professional fishermen.
- Experience the use of some specific fishing gears. For promoting a proper fishing tourism experience, the fishermen should operate the catches with professional gears. In this case, the tourist cannot handle the gears (for safety reasons). Another option is to bring on board fishing rods to be used by the tourist under the direction of the fishermen. This option can be additional to the package of transfer of the knowledge on the professional fishing, but it should not be the core one, because it could be performed by any pleasure vessel not having fishing license.
- Have a trip along the coast that brings the tourist to special areas of the coasts that are possibly accessible only by boat, and allow them to swim/snorkelling, or even diving when they have the certificate. Maximise the synergies with high valuable environmental sites such as Marine Protected Areas (normally accessible for swimming in zone B and C).
- Cooking the fish and serving the meal. Cooking and serving the meal can be done on board where the spaces and equipment allow it. Otherwise, it can be performed on land (at the end of the trip or by getting on beaches at the middle of the day). In case that the latter 2 options are not feasible, it is possible to establish agreements with local restaurants for cooking the fish caught (verify the risks concerning the restriction on the selling of the product caught).
- Return to the boarding site. Be aware that the tourist must be landed only on the port of departure, or the legislation consider it as “transporting activity”. Possibility to have a debriefing/visit the fishing harbour/fishing village before boarding or just after the landing.

KEY RESOURCES

What Key Resources do our Value Propositions require? Our Distribution Channels? Customer Relationships? Revenue Streams?

The main resource which is to be mobilized is the Human Resource of the professional fishermen. It is obvious that for performing the fishing tourism, they must have a professional fishing license and a fishing tourism license. The knowledge of the fishing areas and of the fishing traditions is already part of the cultural baggage of the fishermen to be selected. Nevertheless, they are to be strengthened in terms of the entrepreneurial skills needed for starting the new activity. The availability of the vessel goes side by side with the selection of the fishermen. The need for equipping/adapting the vessels is to be assessed in detail before the start-up of the fishing tourism activities.

Moreover, the development of the Business Model as designed by the Partnership following to the results of the Feasibility Report, need for the availability of some specific key resources. Starting from the development of promotional materials, informative panels in the harbours, informative tables and flyers to be used on the vessel for information (including value added information such as the potential traditional receipts).

Moreover, in the framework of boosting the Mediterranean network among the enterprises carrying out the fishing tourism activities, the Web-portal becomes a key asset. It will be fundamental for marketing and visibility, as well as tool for managing the reservations.

KEY PARTNERS

Who are our Key Partners? Who are our Key Suppliers? Which Key Resources are we acquiring from partners? Which Key Activities do partners perform?

A set of different Partners can be considered as Key for development of the fishing tourism activities. They can be grouped according to the typology of interest/potential support toward the action.

For marketing the service it would be crucial to involve Tourism Agency and Tourism operators (Hotels & Restaurants, often mentioned as the Ho.Re.Ca. sector, but in this case "Ca." as "Catering" is less relevant).

For developing synergies with the primary fishing activities in the target area and for offering the service through collective organizations, as specified in the section "channels", the fishery cooperatives and fishery associations are primary actors. Moreover, the feasibility studies highlighted the fact that they are often the drivers of all the different initiatives of project boosting the diversification of the fishery sector. Therefore, the synergies with the other initiatives and

projects ongoing should be explored. The local authorities and public bodies in charge for the development of the tourism and of fishery (such as the Fishery Local Action Groups) are the other key actors for developing synergies.

Concerning the aspect of the authorizations needed for starting the activities, an open dialogue should be established with the port authorities and coastal guard, alongside with the Bodies in charge of the certification of the vessels (such as BureauVeritas or RINA).

COST STRUCTURE

What are the most important costs inherent in our business model? Which Key Resources are most expensive? Which Key Activities are most expensive?

As mentioned in the revenue flow, the performing of the fishing tourism activity has relevant costs to be considered.

Concerning the fixed costs, we should consider the cost for the adaptation of the vessel or its equipment (starting from the safety ones) and the costs of certification. For the vessels assisted through the project, part of those costs can be taken in charge of the project together with the production of the informative material. Moreover, among the fix costs we should consider the insurance of the vessel, annual maintenance of the vessels and of the fishing gears, mooring, and some administrative costs (such as the annual renewal of the licenses). Concerning the variable cost, we should start by the cost of the fuel. It depends by the type of the vessel, the length of the trip and the cost of the fuel in the Country. We should then consider the cost of the human resources. In case of crew embarked, the cost of the working day of the staff is to be considered. The cost of the fishermen should be also considered in terms of cost opportunity, under the perspective that for each fishing tourism day he has to renounce one fishing day, in particular in summer when there is an higher fish demand from local restaurants, hotel and fishmongers’.

Where external actors are involved in the ticketing and reservation (the cooperative itself and the tourist agencies and operators), a fare for the ticketing service (in percentage or in fixed amount) should be considered.

In spite of this rough overview of the main costs, a detailed analysis of the costs should be performed for each vessel involved, for contributing to assessing the viability and the correct pricing strategy of the activity.