

TOURISMED

Fishing Tourism for a Sustainable Development in the Mediterranean area

Activity 3.7 “WP3 Monitoring and evaluation”

Deliverable 3.7.5 Pilot testing evaluation report

Partner responsible: PP8 - Petra Patrimonia Corsica

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Abstract

The main aim of deliverable 3.7.5 “Pilot Testing Evaluation Report” is to provide information on performance and achievements of the fishing tourism business model, analysing results of the evaluation and surveys carried out in 5 different MED Countries (Italy, France, Spain, Greece, Albania) and making specific recommendations for its revision and improvement.

It is based on the Pilot Testing Reports (Deliverable 3.4.9) developed by each partner responsible for the Pilot Testing activity.

In the framework of TOURISMED, the most important and Med-wide piloting of fishing tourism ever organised in Europe was carried out.

Introduction

The fishing tourism business model (D3.1) describes the logic with which the tourism company linked to the fishing and fish products creates, distributes and captures value. Considering the territorial diversity of the various European contexts, the Business Model (BM), which proposed within TOURISMED, represents a methodological approach to be offered to fishermen for the development of their specific Business Model, as an expression of the territorial and market context where the fishermen community works.

The fishing tourism business model (D3.1) identify the core aspects of the fishing tourism business focusing on key activities, key resources, value proposition, customer relations and segments, key partners, cost structure and revenue streams.

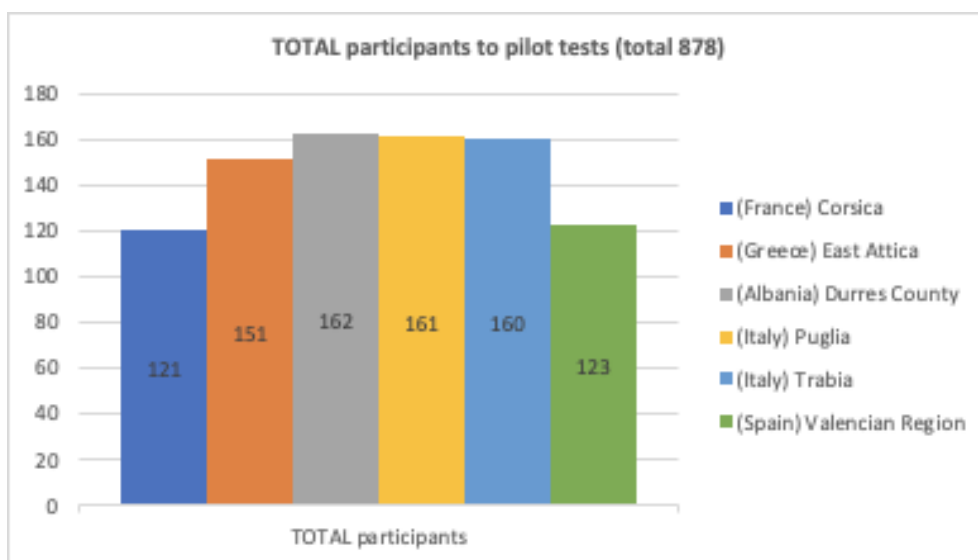
According to project ratio, 5 out 6 MED Countries involved (Italy, France, Spain, Greece, Albania) organised pilot trials in order to test the fishing tourism business model and to provide feedbacks and inputs to improve it (both at local and at project scale) in the project's refinement phase. **142 fishermen out of 90** foreseen in the Application Form were actively involved in 6 MED regions **Italy**: Sicily and Puglia; **Albania**: Durrës County; **France**: Corsica; **Spain**: the Valencian Region; **Greece**: East Attica. **878 participants out of 960** took part to **150 fishing tourism trial trips** organised by **33 vessels**.

The main aim of following deliverable (3.7.5 "Pilot Testing Evaluation Report") is to prove information on performance and achievements of the fishing tourism business model, analysing results of the evaluation and surveys carried out in 5 different MED Countries (Italy, France, Spain, Greece, Albania) and making specific recommendations for its revision and improvement.

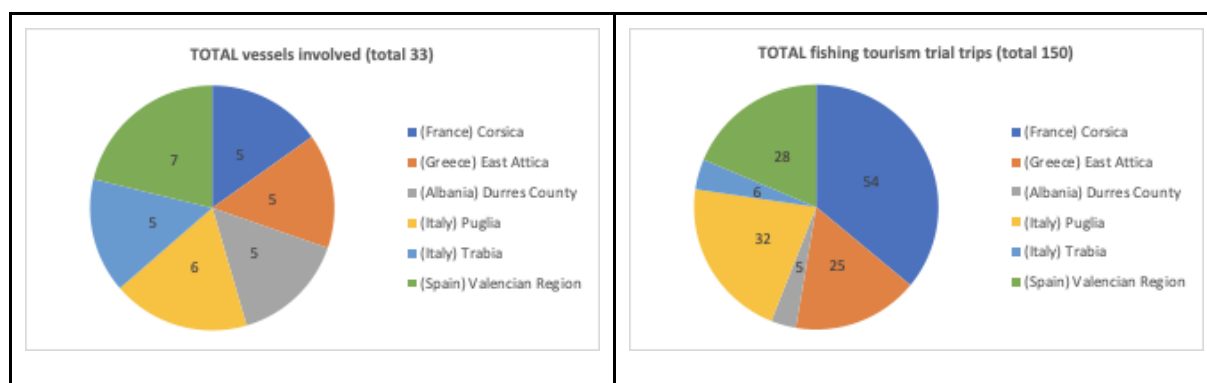
It is based on and structured as the Pilot Testing Reports (Deliverable 3.4.9) developed by each partner responsible for the Pilot Testing activity.

The vision of tourists

878 participants took part to pilot trials organised in 6 MED regions **Italy**: Sicily and Puglia; **Albania**: Durrës County; **France**: Corsica; **Spain**: the Valencian Region; **Greece**: East Attica.

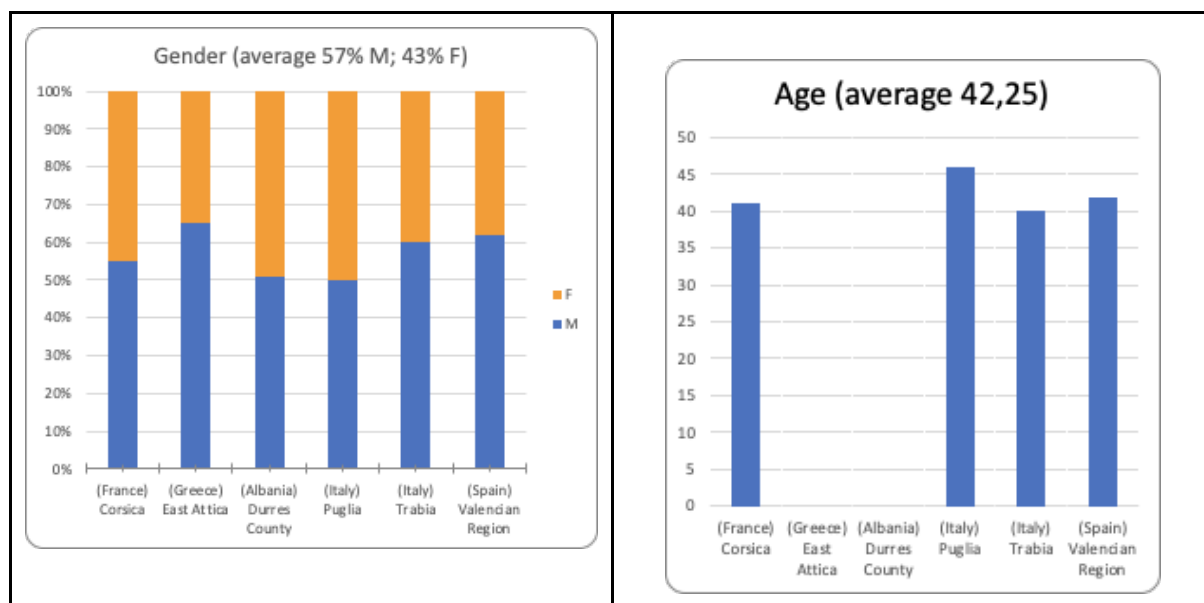


150 fishing tourism trial trips were organised by **33 vessels**.

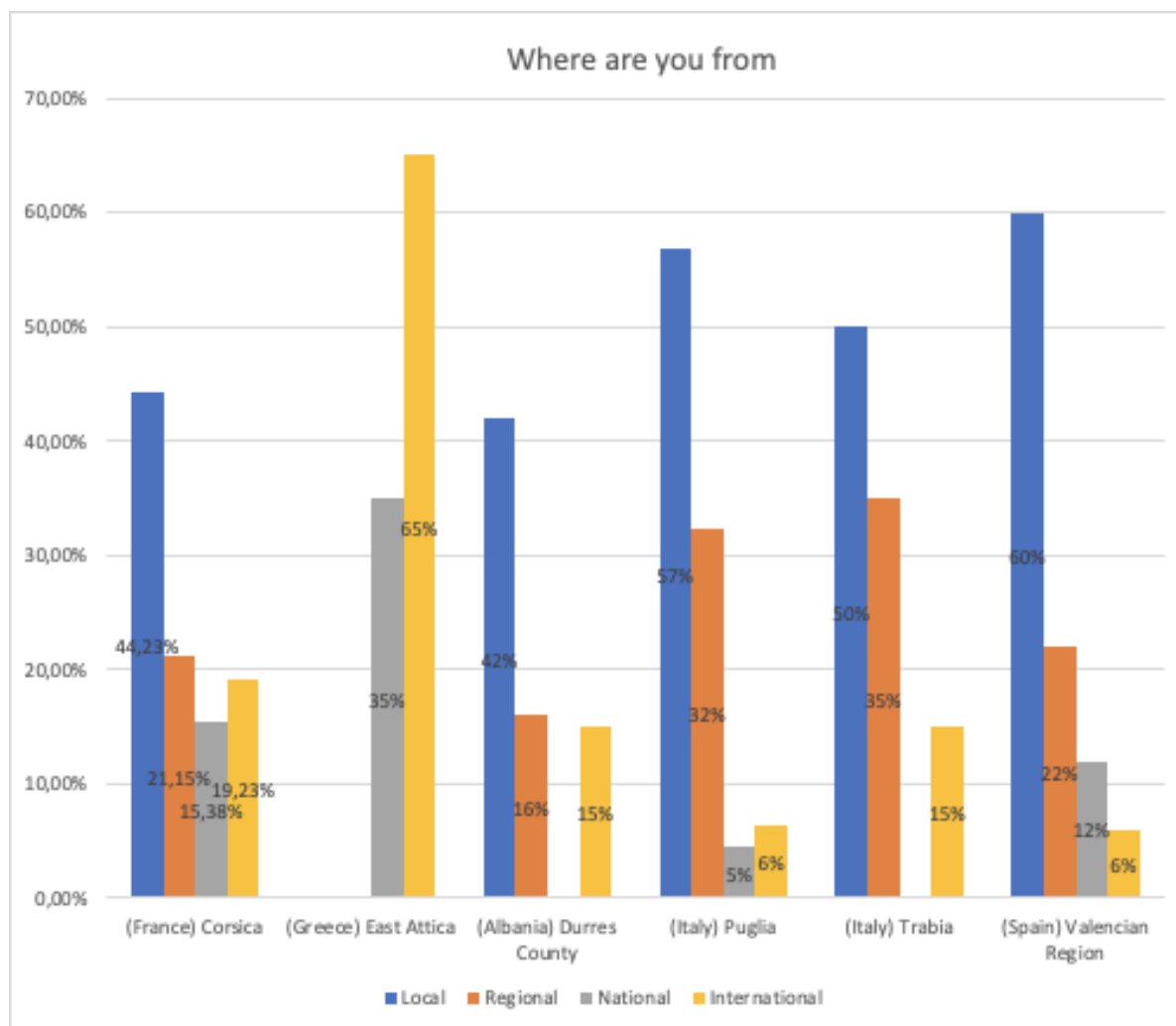


It is the most important and Med-wide piloting of fishing tourism ever organised in Europe and feedbacks provided by participants will be of great value, mainly to help decision-makers to set a new political agenda that will guarantee a sustainable development of the blue economy at Med side, as well as that will set economic diversification as a key aspect to be addressed.

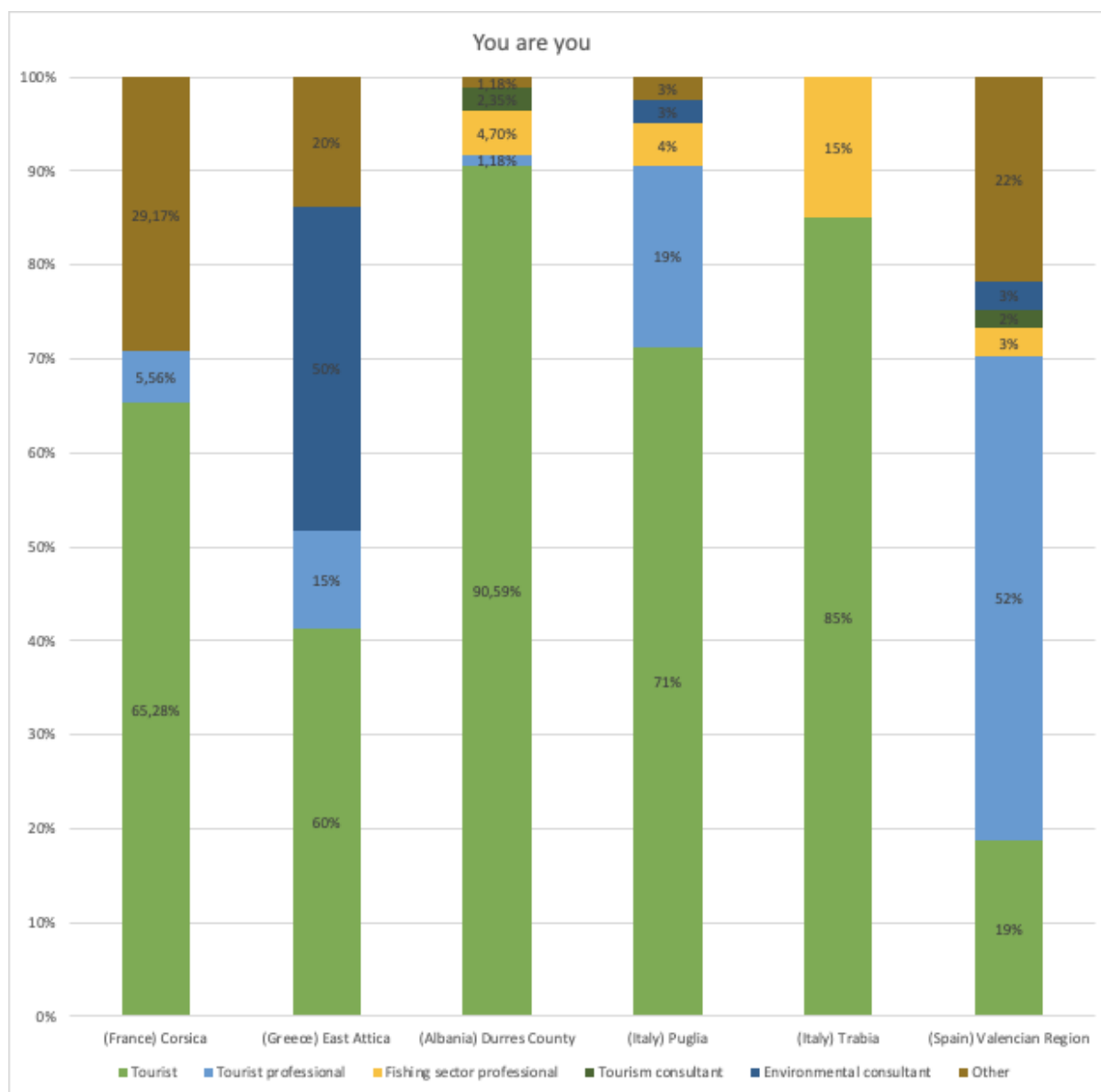
57% of participants were Male, and 43% Female and the average age was 42,25.



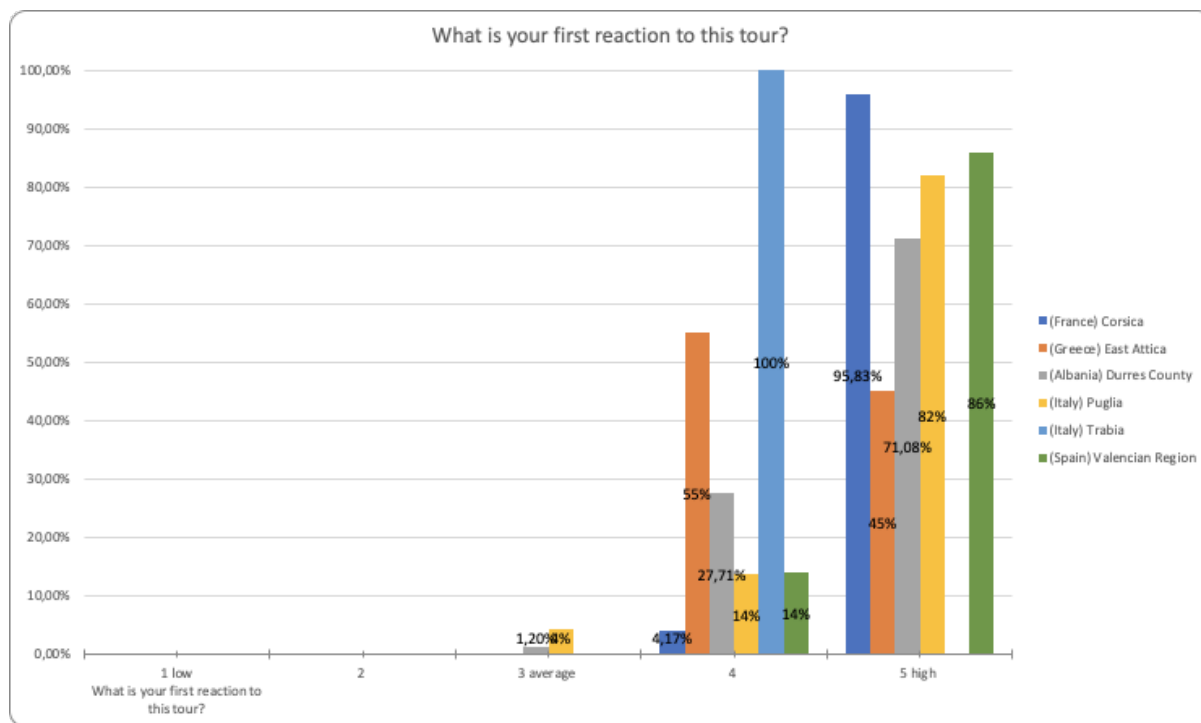
As for the provenance, local and regional participants were the great majority in all Med regions involved, mainly because it was easier to involve them in trials. In Greece, a great majority of international tourists participated.



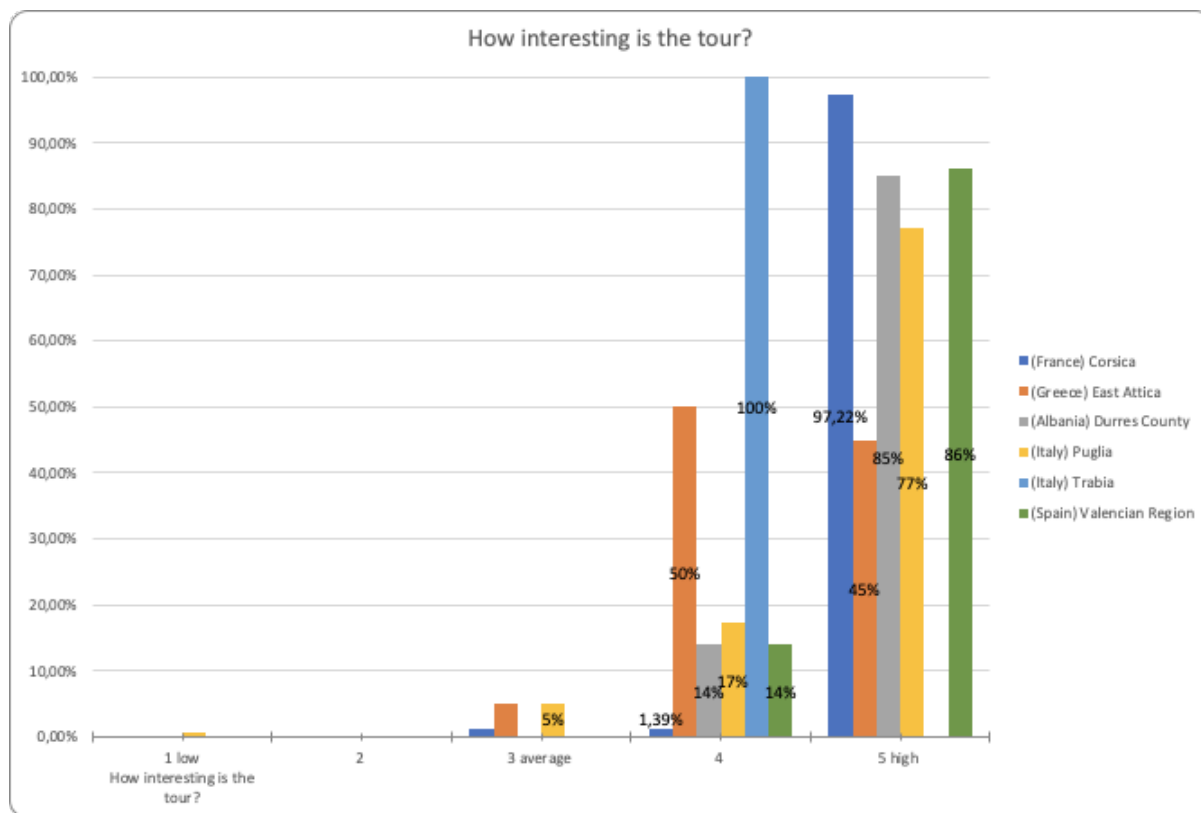
A good participation of tourist professionals is to be underlined, and it will be crucial to guarantee the sustainability of the fishing tourism as economic activity.



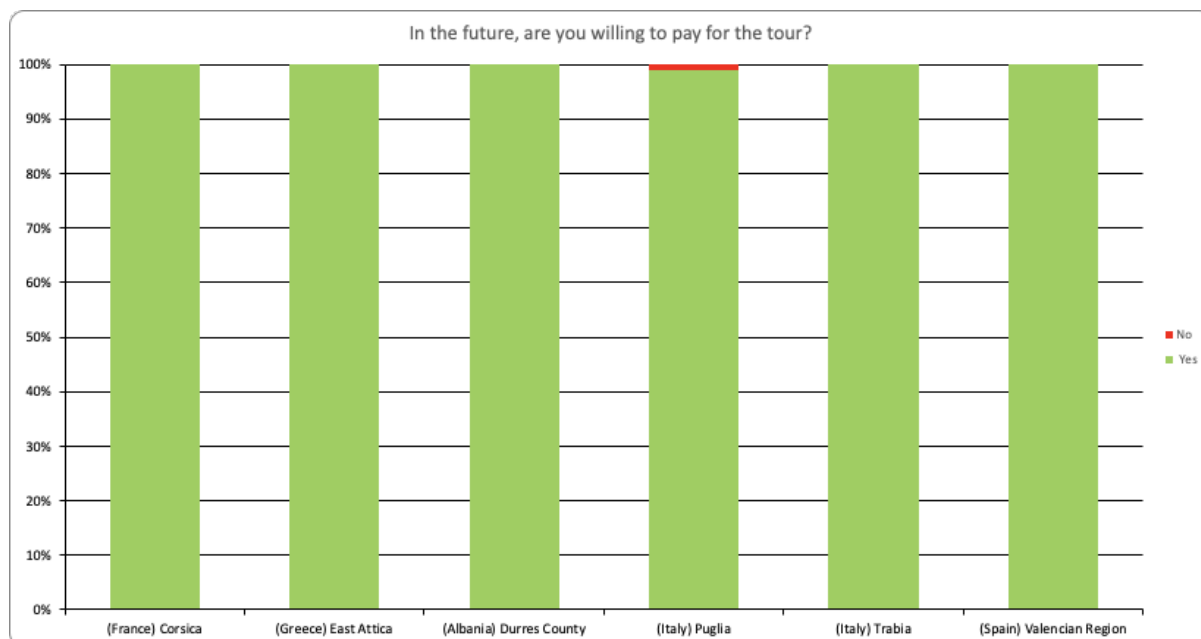
Tourists' first reaction to pilot trials was extremely positive



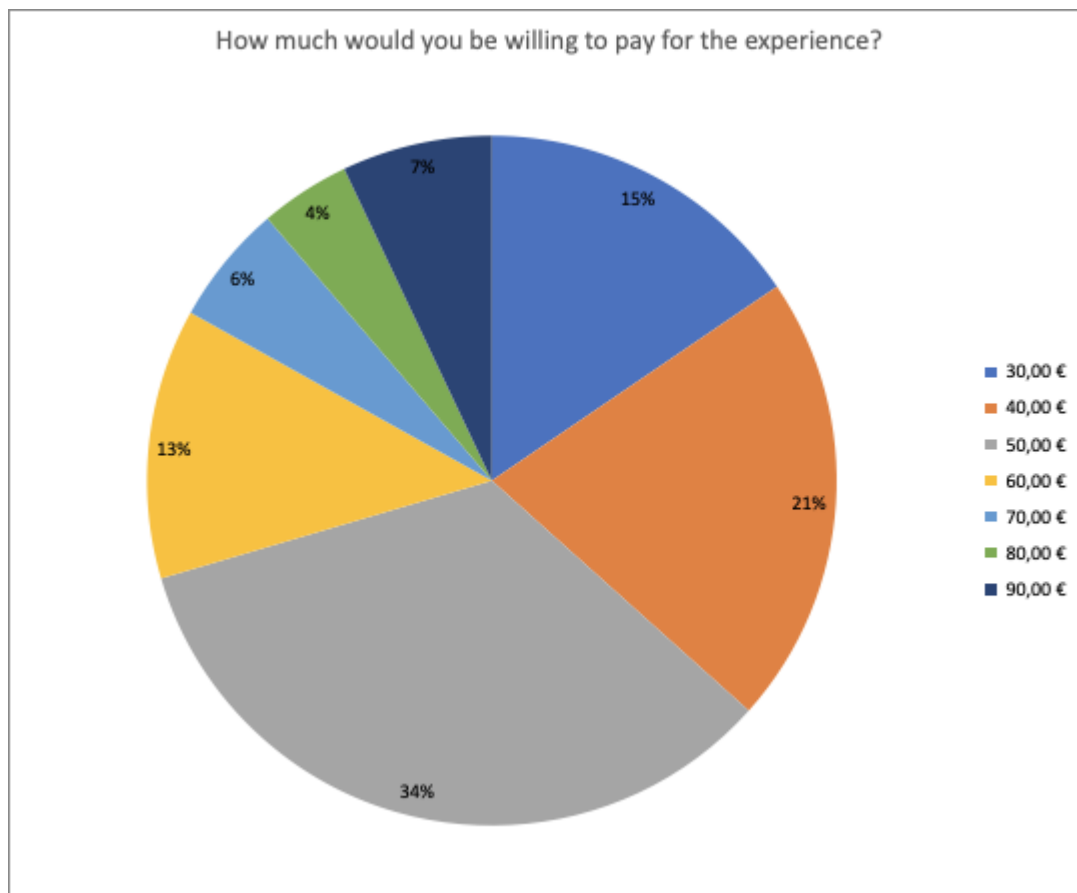
Tours organised in 6 Med regions were evaluated as very interesting and highly interesting by almost all participants.



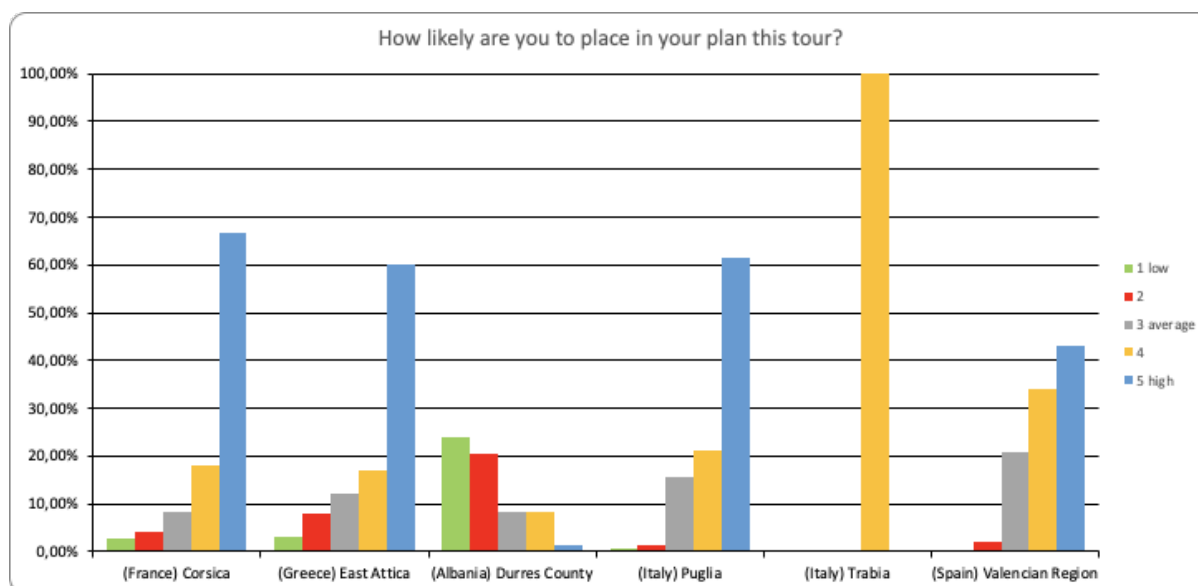
And the good news for TOURISMED and for the blue economy at Med level is that all of them are willing to pay in the future for a fishing tourism tour.



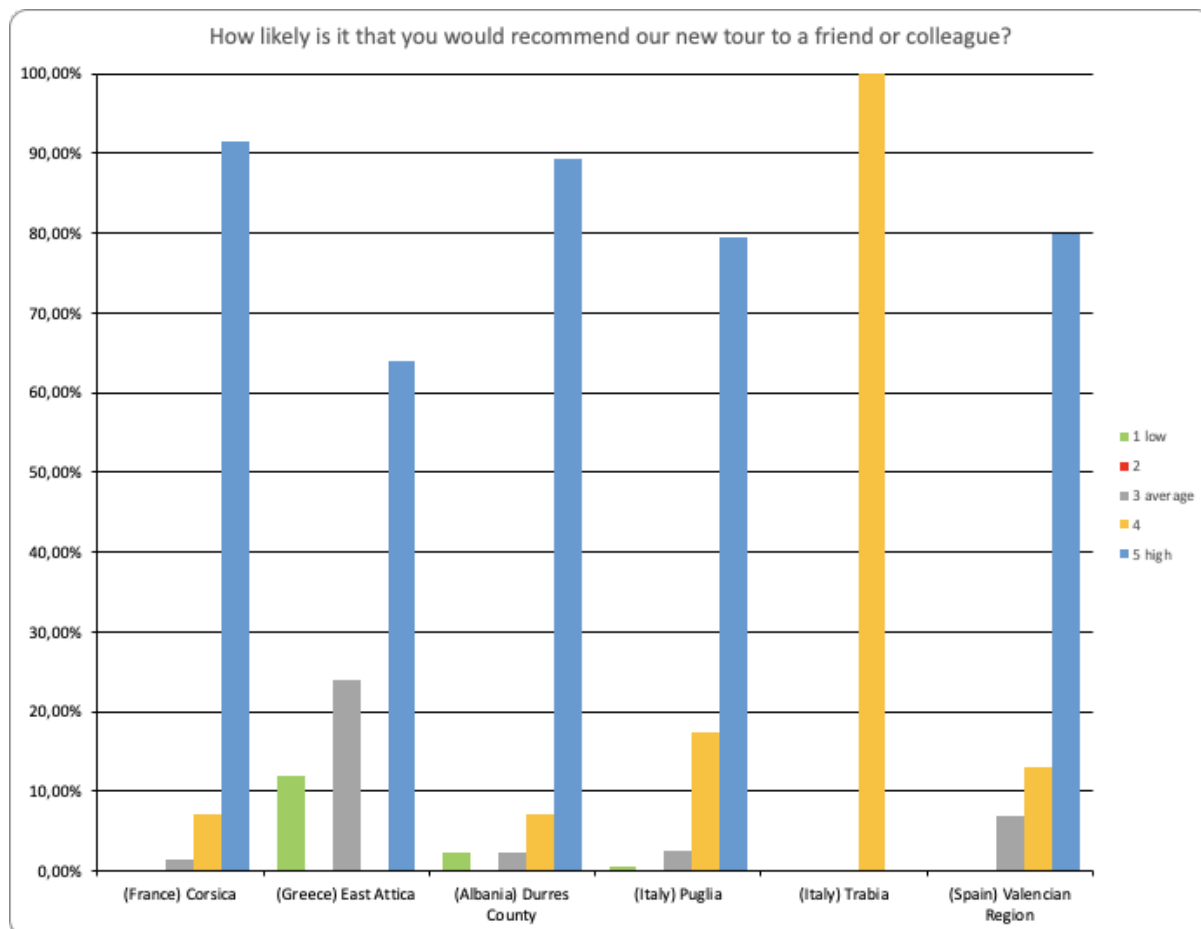
We also asked how much they would be willing to pay for the experience. As shown in the graphic below, 34% of respondents are willing to pay 50€; 21% of them 40€, 15% 30€ and 13% 60€.



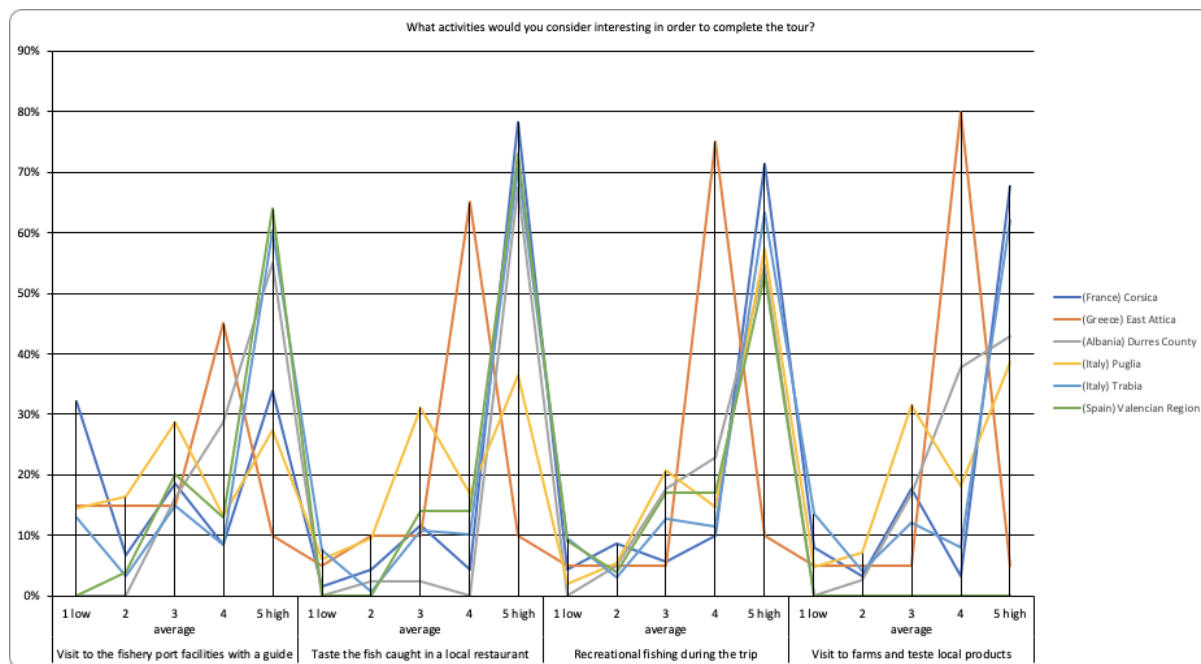
“Placing fishing tourism in your tourism plan” was already asked. In all regions, the greatest majority of tourists expressed their willingness to add fishing tourism in their next tourism plan.

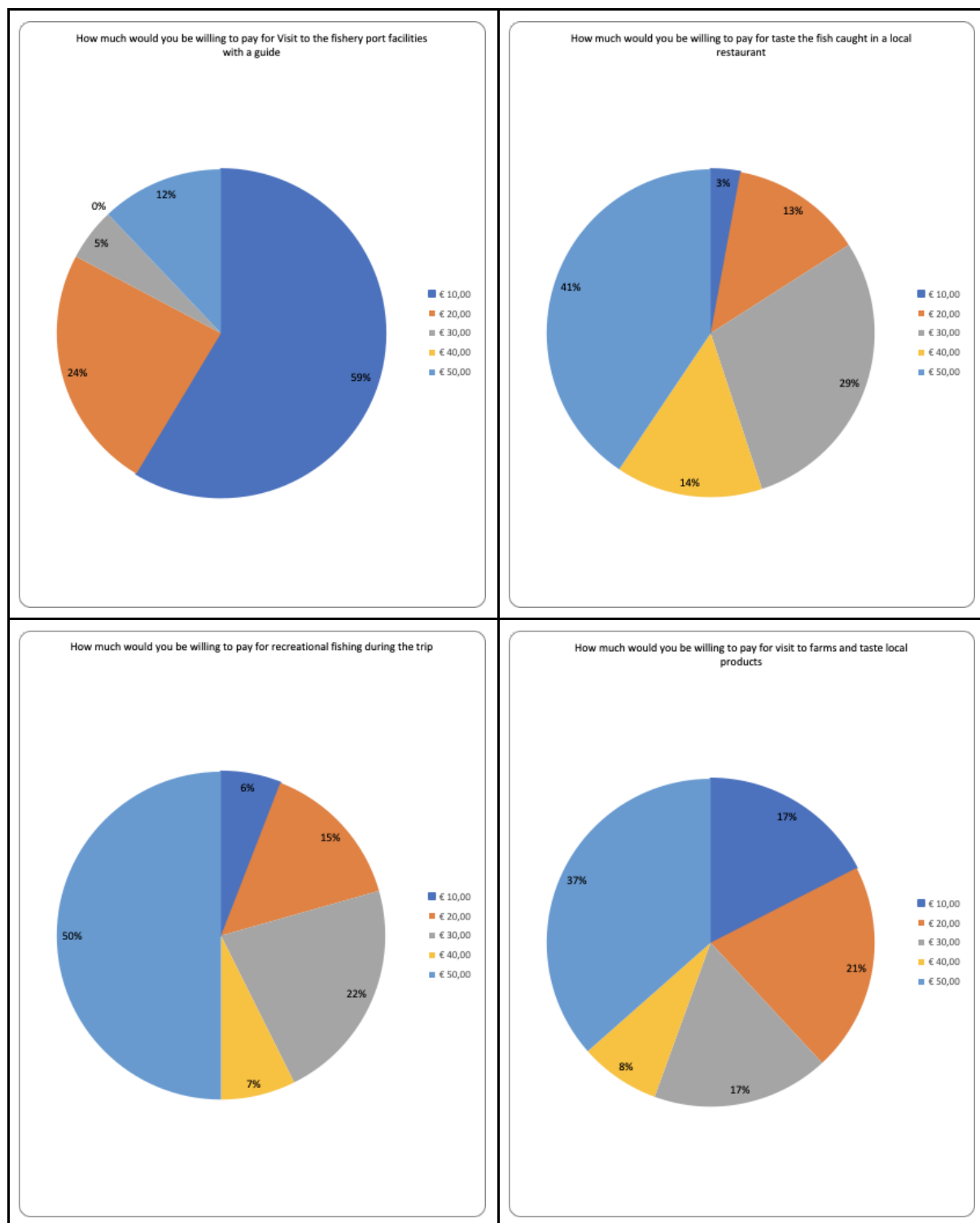


Fishing tourism is also likely to be communicated through “word of mouth”.



In order to complete the tour, tourists preference see “taste the fish caught in a local restaurant” as one of the most crowded request. It is followed by “recreational fishing”. It is important to underline that in Greece a great part of preferences were “visit to farms and taste local products”.





The perception of fishermen and local partners

In Corsica (France)

In **fishermen's view**, fishing tourism:

1. will give the possibility to tourists to experience one day in fisherman's boots, understanding daily difficulties, as well as showcasing the artisanal fishery techniques
2. will serve to make the sector more attractive to future generations and inspire and facilitate the entry of a new generation of fishermen into small-scale fisheries.
3. This aspect is very important because "youth deciding to become artisanal fisherman - and nowadays it is very complicated to start-up artisanal fisheries enterprises - should be equipped with passion", but also "youth fishermen could count on an important add-value (compared to the oldest generation): the possibility to use ICTs"
4. will decrease fishing pressure on the seafloor and preserve its regeneration and sustainability
5. will represent a good diversification activity, mainly if linked with itti-tourism activities

In the **local partners' view**, fishing tourism

1. is one of the two key enabling diversification actions that will be implemented on the ground within the FLAG Corse 2014-2020 (the other one is itti-tourism)
2. is to be intended as a showcase for inner and agro-tourism areas and products
3. has the potentiality to act as a strategic "attractor" able to link sea and mountain, coastal tourism with inner and agro-tourism
4. could be a way to successfully combat tourism seasonality

In East Attica (Greece)

Fishermen were excited to have the chance to participate in TOURISMED pilot tests and adopt the fishing tourism business model, since they highly appreciated the support the project provided (planning, communication tools, pilot fish trips). They will maintain the activity and improve it in the forthcoming years, especially regarding the following points:

- English speaking staff for all the vessels
- Invite future generations to adopt the model and activate them again to the fishing sector
- Involve municipalities at a higher extend and establish fishing tourism activity a major tourism sector for their areas.

- Begin the activity from May and June, when the weather will be better and the winds calmer.

Local partners (restaurants, tourist agents and hotels) regarded the fishing tourism business model as an alternative way to bring customers and provide them innovative services. They will improve their cooperation with fishermen and work more on the aspect of establishing an all-inclusive ticket for all the involved parts (fishermen, restaurants, agents).

In Durres County (Albania)

As a reflection of the tested itineraries, we may say that we were faced with curiosity, interest, skepticism at the fishermen involved in these pilot tests. It is understood that these conclusions are somewhat preliminary, since the development of this activity in the first steps and required to be completed by legal, regulatory acts, practical framework and gaining some experience in this field: It is for sure that the combination of the artisanal/traditional with tourism fishing activity and the many resources Durres district as well as whole Albania offer a lot. The fantasy of the operators involved would offer a great variety in this field.

In Sicily (Italy)

Fishermen from Sicily count on fishing tourism, hoping that activity could improve and increase their salary (actually exiguous due to the competition of the big fishing boats, which reduce their chances to catch the fish) and in order to reduce the hours of fishing work. Fishermen propose to form a consortium and bind it to commercial activities such as: restaurants, hotels, café, tour operators with the aim of promoting their fishing tourism activities. Regarding to this, fishermen deem that the use of the TOURISMED online platform could be useful to their activities.

In Puglia (Italy)

In Puglia the fishermen warmly welcomed the opportunity to start the fishing tourism activity. In the last decades the reduction of the catches has terribly reduced their revenues, so that several fishermen already decided to leave the sector. The remaining ones decided to stay for passion for their job but struggle with the very limited income. Moreover, fishery is considered no more attractive for the young generations, so that few are taking over the job of the parents. Fishing tourism respond to both those concerns.

The fishermen in Puglia already have some examples of colleagues already running fishing tourism, so that they are aware of the potentialities in terms of income, nevertheless several of them so far were hampered from accessing this new activity for barriers in terms of:

- Investments needed on the vessels;
- Knowledge about the legislation (licenses, etc);

- Capacity to run the activity;
- Missing connection with the touristic sector.

The project provided support under all those aspects, so that they were enthusiastic to actually be able to start the activity.

The fact that tourism is increasing since several years in Puglia, and that fishing tourism is an activities receiving more and more requests have avoided any conflict with the fishermen already running this activity before the project. In fact, the latter considered the initiative as an opportunity to give more visibility to their activity and increase the level of professionalism.

Concerning the other local stakeholders, in Puglia there is a high awareness on the value of the slow tourism/ Responsible tourism that valorizes the traditional culture (as in the case of the several local agrotourism). Therefore, it was simple to convince stakeholders to support this new economic activity by integrating it with the rest of the touristic offer.

In the Valencian Region (Spain)

In general, the acceptance of the project by both the fishing sector and the local partners that have participated has been very positive. The proactive attitude of the sinners and of the Cofradías has been remarkable, removing some isolated cases where the activity of the fishermen has been a little more passive, as it was in some cases in Jávea.

The schedules of professional fishing have not been modified by the activity of pescaturismo. In the Valencian Community, the activities of fishing-tourism are carried out in professional schedule of the fishing sector, therefore the hours of work are not reduced.

Fishing tourism in the Valencian Community will serve as an economic complement to the income of fishermen in a normal working day. The project has been very welcome from the Valencian Community.

The project has been very well received and supported by the Conselleria de Turismo de la Comunidad Valenciana, as it is totally in line with its strategy of diversification of the tourism sector, and in particular with the line of CreaTurisme.

Main findings

In Corsica (France)

- **Customer Segments**
 - Youth Backpackers
 - Couples (without children or with 7-13 years old children)
- **Value Proposition**
 - experiencing one day in fisherman's boots
- **Communication and sales channels**
 - communication through social media (Instagram; Facebook; Twitter)
 - viral communication through social and "analogic" influencers
- **Customer Relationship**
 - face-to-face
 - social media interaction
- **Revenue Streams**
 - organisation of cooking course based on caught fish
 - informal learning opportunities organised during the trip
 - buying videos/photos of the fishing tourism experience
- **Key actions**
 - Cooking the fish and serving the meal

In East Attica (Greece)

- **Customer Segments**
 - Male tourists are more interested in fishing tourism activity
 - Invest on advertising the activity to people over 30 and even better over 45 years old
- **Value Proposition**
 - An all-inclusive ticket is necessary to be used for each itinerary for better communication between tourist agents, restaurants, fishermen and tourists.
- **Communication and sales channels**
 - Communication mechanisms should be adopted by municipalities in order to establish their areas as unique destinations for fishing tourism activity
 - Communication activities should not stop during winter months, but should be emphasized, especially to tourism markets outside Greece.
- **Customer Relationship**
 - Fishermen should try to keep contact with tourists already experienced fishing tourism activities in order to advertise their experience
- **Key actions**
 - Alternative itineraries for walking experience are necessary not only for cases of bad weather, but also for family members that are not interested in fishing.
 - Supplementary fish should be added to tourists' fish catch in many cases in order to provide enough fish for the family meal.
 - Cooking within the vessel proved dangerous, unsafe due to way weather conditions.
- **Key partners**
 - Municipalities and business associations should be more engaged in promoting fishing tourism activity.

In Durres County (Albania)

The fishing/tourism reality in Albania, it is all a new experience.

There are many dilemmas on how the future of this activity will be, there is a lot of curiosity about how will be realize the combinations of touristic elements with those of the fishing forms, it will be a disconnected venture from the tourist packages, thus the initiative of the fishing entity itself or integral one within the touristic package, will be a seasonal or all-yearly activity, the prices of the tourist fishing will be the prerogative of the fishing subject or dictated by tourist agencies, what supporting policies to stimulate this activity (national and/or local level), there will have limits to the number of fishing operators that would like to develop this activity, etc?

In Sicily (Italy)

- **Customer Segments**
 - families with children
- **Value Proposition**
 - €30 per person
- **Communication and sales channels**
 - Social network
 - TOURISMED platform
 - Tour operator
 - Municipal Tourist Office, and promotion made through local business activities' advertising
- **Customer Relationship**
 - both individual and mediated by the third parties indicated above
- **Revenue Streams**
 - (if we mean the gain of each fisherman in the summer season) it could correspond to a few thousands of euros in the three months of summer season
- **Key Resources**
 - Publicizing
- **Key actions**
 - Publicizing
- **Key partners**
 - Municipality of Trabia
- **Cost Structure**
 - the cost to keep the requirements, needful to maintain the fishing tourism license.

In Puglia (Italy)

- **Customer Segments**
 - Retired people (local or international);
 - Families, mainly with children under 12 (local or international);
 - Couples;
- **Value Proposition**
 - Real fishing experience on board (never experienced even by local people);
 - Learning opportunities on the marine biology and coastal area;
 - In some cases, the possibility to access in areas otherwise inaccessible (the natural reserve)
- **Communication and sales channels**
 - Social media (Instagram; Facebook; Twitter) of the fishermen and of the local touristic companies;
 - Local Tourist Office (flyers provided by the project);

- Tourist offers by the local tourist company Serapia (already selling other “natural” itineraries in the area, and managing a small hosting facility).
- **Customer Relationship**
 - face-to-face during the visit;
 - Keep in touch with social media interaction after the visit for spreading the awareness toward other people.
- **Revenue Streams**
 - Mainly the cost of the fishing tourism trip;
 - Potential higher cost for the lunch/dinner on board (normally requested);
 - Potential fidelization of customers as buyers for the direct fish selling by fishermen (if resident in the area or tourists having a second house in the area for long holiday period).
- **Key actions**
 - Set up a proper system of reservations;
 - keep strong relations with the other actors of the tourism sector.
- **Key partners**
 - Cooperativa Serapia (Tourism cooperative already offering other “natural” trips and having several biologists available as guides)
 - The 2 main local Fishery cooperatives (crucial in supporting fishermen in overcoming several constraints and empowering them);
 - Local Tourist offices;
 - Coastguard.
- **Cost Structure**
 - Fuel,
 - Biologist guide (when requested),
 - Reservation system cost (when passing through the tourist company),
 - Cost of the product cooked (normally not only the fish caught).
 - Occasional renovation of tools and equipment.

Conclusion

In the framework of TOURISMED, the most important and Med-wide piloting of fishing tourism ever organised in Europe was carried out.

Feedbacks provided by participants will be of great value, mainly to help decision-makers to set a new political agenda that will guarantee a sustainable development of the blue economy at Med side, as well as that will set economic diversification as a key aspect to be addressed.