



A market analysis for improving fishing tourism management in Galicia (Spain)



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ABSTRACT

EU policy has been supporting fishing tourism projects since 2000 with the general goal of fostering diversification initiatives and providing a higher social value to fishing activities. In this study the main features of this market are analysed through two fishing tourism projects which are still operational in Galicia, Margalaica and Pescanatur, undertaken by two Galician Fisheries Local Action Groups (FLAGs). The major results of this study reveal social changes brought about by these projects. Therefore, it can be concluded that the EU main objectives are relevant to the Galician case. Furthermore, the results show that the development and success of these projects depend on the roles played by the different stakeholders involved.

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1. Introduction

Since the late 90s, the objective to diversify fishing activities more efficiently and to take advantage of the resources has been a stable goal in European Fisheries Policy. The economic crisis, which peaked earlier in this decade, has placed that goal as a central task for fishery administrations in most coastal countries.

In fact, the Axis 4, so called in the reform of the Common Fisheries Policy (henceforth CFP), is geared to investments classified as “smart and green” through which fishing communities can increase their income and, especially, maintain and create new jobs based on a strategy of diversification and higher quality in the management of marine resources (Penas et al., 2011), as well as promoting social equality and environmental sustainability (Johnson, 2006). In this context, particular attention should be paid to low population density areas, declining fishing activities or small fishing communities (chapter 4, article 43). The funding provided through this scheme is referred to as the European Fisheries Fund (henceforth EFF).

The lines of action of CFP have the purposes to strengthen the competitiveness of fisheries areas by adding value to fisheries and

aquaculture products, to diversify operations and to undertake the social restructuring of areas facing socio-economic difficulties; as well as to preserve the fisheries heritage and promote activities to understand and make this culture better known (chapter 4, article 44) (Council of European Union (2006)).

This new European Policy paradigm became visible at a regional level during the creation of supramunicipal bodies called Fisheries Local Action Groups (henceforth FLAGs) which are defined as associations integrated by different public and private partners (economic, fisheries and social sectors). The goal of these local entities is to promote and develop projects following the CFP objectives, and to implement an integrated local development strategy based on a bottom-up approach in agreement with local governments (chapter IV, article 45) (Council of European Union (2006)).

The concept of fishing tourism was first defined in Italy, a pioneering country in this activity through Lega Pesca (Italian Association of Fishing Cooperatives), as the boarding of non crew members for the purpose of recreational and tourist activities (Consiglio dei Ministri de Italia, 2001). In 2014, 312 FLAGs from 21 European member states developed a total of 8488 projects funded by EFF, some of them focusing on fishing tourism (European Commission, 2014c).

For the financial framework 2014–2020, the EFF is adopting as its main objectives the diversification of the fishing activities,

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particularly the ones geared towards tourism, the valorisation of cultural and environmental heritage and the reinforced role of fisheries communities in the local development (The European Parliament and the Council of European Union, 2014). In other words, fishing tourism is viewed as a way to complement fishermen's commercial activity as well as a tool to make the traditions and culture of coastal communities known.

In Galicia, the existence of fishing associations dates back to the thirteenth century (Villasante et al., 2015). Coastal communities have historically depended upon income from fishing, especially on northwestern Galician coast (Surís-Regueiro and Santiago, 2014). Nowadays, the importance of this activity at socio-economic and environmental level is higher than in other parts of Spain or the EU (Macho et al., 2013). This sector employs 4.6% of the Galician workforce, higher numbers than in the rest of the EU (Villasante et al., 2015; Seijas, 1998).

On the ecological level, there is a strong indication that many of the Galician coastal fisheries are currently mishandled and over-exploited (Freire et al., 2002; Freire and Garcia-Allut, 2000). Moreover, more recent studies estimated that important Galician biological communities, such as the rocky reef fish, have declined up to 76% over the past 50 years, data that suggests the local fish stocks are at near collapse (Pita and Freire, 2014).

From a social and economic point of view, since the end of the 90's and during the 2000's the revenue in the fishing sector has stagnated due to a negative link between the price of fish and the CPI. This has prompted considerable interest in diversifying activities, promoted by the European Union, with the main focus on fishing tourism (Pardellas, 2010). That explains why some Galician harbours have been involved in projects, mentioned below, such as ANDATURA, FARO and SAGITAL since 2002.

In accordance with the guidelines of the EFF, those projects, in addition to fishing tourism activities, are outlined as a main objective the consolidation of leaders to take forward development processes in local fishing communities (Montero-Llerandi and Moreno-Jiménez, 2007; Molina-García et al., 2010). As will be seen further on, the most significant impact of Galician projects was observed in the social environment, where there has been a positive change in Galician society's previously poor perception of fishermen and sea-based jobs. The FLAG's managers interviewed during this research project placed special emphasis on this fact.

Therefore, the aim of this study is to determine the status of fishing tourism in Galicia within the context of CFP objectives and the European experiences. Specifically, the study examines the fishing tourism market behaviour in two of the projects which continue their activity in Galicia, Margalaica and Pescanatur. The data was collected from FLAG 4 and FLAG 5 by means of tourist surveys and completed with in-depth interviews with FLAG managers and local skippers.

Thus, Section 2 presents different experiences of fishing tourism both at international and Spanish levels. In Section 3 the study area is characterized in terms of its geographical, historical and socio-economic aspects in order to understand the present situation of the sector in Galicia. Section 4 describes the methodology used in the study. In Section 5 the results are presented and discussed in terms of two categories: supply and demand. Finally, the main conclusions are summarized in Section 6.

2. International and Spanish fishing tourism experiences

In the last few years, several fishing tourism projects were undertaken both at the international and national levels. However, most of them were pilot studies about which no exhaustive data was collected by their project managers. Furthermore, a review of the international literature on this subject reveals an absence of

information, thus forcing researchers to rely heavily on reports prepared by project managers for data gathering.

Prior to EFF financial support, in the 80's in Sicily Lega Pesca (Lega Pesca, 2014), one of the pioneering projects in fishing tourism, offered a product contemplating fishing in the summer months and giving tourists visiting the area the opportunity to learn about fishermen's profession (European Commission, 2003).

The interest generated among visitors quickly showed the benefits of this product for environmental conservation and for the income of fishermen. This prompted a definition within the legal framework for the offer of fishing tourism in Italy in 1982, a law updated in the following years (2001), which included the boarding of families with children. In spite of its uneven evolution, Lega Pesca still is an international pioneer in fishing tourism and remains the most stable experience in EU reports and documents.

Other countries became also interested in fishing tourism projects, such as China which developed a feasibility study in the Hong Kong area (The Hong Kong Polytechnic University and School of Hotel and Tourism Management, 2011) or Canada which elaborated some studies and pilot experiences in the Gaspé Peninsula (Quebec) (Association touristique régionale de la Gaspésie, 2014) and Bonne Bay region (Newfoundland) (Lowitt, 2011).

In Europe, the funding and effort on the part of European institutions led to the proliferation of different projects following the Axis 4 recommendations. In recent years, some projects can be highlighted in France: Pescatourisme 83 on the Coast of Var in 2009 (European Commission, 2014b) and Pescaturisimu in Corse in 2013 (Agence du tourisme de la Corse, 2014).

In the Spanish context, there were only a few projects and, in general terms, they were short-lived and had a narrow scope. In the case of Galicia, the projects focused on revitalizing coastal areas through fishing tourism (see Table 1).

3. Characterization of the study area

Galicia, located in NW Spain and one of its 17 Autonomous Communities, has a regional government (Xunta de Galicia). The region has a long coast line (around 1498 km) whose local economy is based on artisanal or small-scale fisheries and tourism. The fisheries sector is managed by fishermen's guilds or *cofradías* (Franquesa, 2004).

From a historical point of view, it is necessary to describe the evolution of the Galician fishing industry in recent decades in order to understand why fishing tourism projects have emerged in this area.

The integration of Spain in the European Community in 1986 had some important positive and some relatively negative effects on Galician fisheries. The most favourable consequence was the

Table 1
Spanish fishing tourism projects.

Projects in cooperation with other EU countries		
2000	ANDANATURA	Spain-Portugal
2002	FARO	Spain-Italy-Portugal
2002	ACUISPESCA	Spain-Italy-Portugal
2002	MARIMED	Spain-Italy-France
2004	SAGITAL	Spain-Italy-France
2006	SEREA	Spain-Italy-France
2011	MAREMED	Spain-Italy-France-Cyprus-Greece
Galicia-based projects		
2004	MAR DE LIRA ^a	Galicia (Spain)
2005	PESCANATUR	Galicia (Spain)
2006	GUIMATUR	Galicia (Spain)

^a Later renamed Mar Galaica.

Source: (European Commission, 2014a).

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