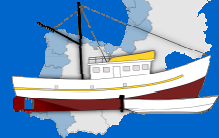


PRESPO

Programa Operacional
Fundo Europeu de
Desenvolvimento
Regional



Sustainable development of Artisanal Fisheries in the Atlantic Area

Marine tourism in the Atlantic Arc: potential demand analysis

April 2012



ATLANTIC AREA Transnational Programme
ESPACIO ATLÁNTICO Programa Transnacional
ESPACE ATLANTIQUE Programme Transnational
ESPAÇO ATLÂNTICO Programa Transnacional



European Union

ERDF Funds

Investing in our common future

Marine tourism in the Atlantic Arc: potential demand analysis

Rosa Chapela, CETMAR

Marta A. Ballesteros, CETMAR

Javier Félix, CETMAR

Jose Miguel Domínguez, UCA

Mercedes Jiménez, UCA



Recommended citation:

Chapela, R., Ballesteros, M., Felix, J., Domínguez, J.M., Jiménez, M. 2012. Marine Tourism in the Atlantic Arc: potential demand analysis, *CETMAR/UCA Report of Project PRESPO*, pp. 20.

1. Introduction

Socioeconomic diversification in the fisheries sector – understood in its broadest sense¹ – is a recent activity that has gained special relevance in the last years. As strategy, it aims to countervail the decline in the sector's income and the fishing communities' viability, aggravated by critical issues such as: overfishing and overexploitation of fisheries resources, low prices at first sale, exponential increase of operating costs, closure of fishing grounds, etc. Within this scenario, diversification thus becomes an opportunity by seeking revenue through additional and/or alternative activities. Furthermore, socioeconomic diversification focuses on multiplying the economic activity of the coastal areas by their integration and/or collaboration of private and public agents with the fisheries sector. In fact, to booster synergies and scale economies will be an important issue for the development of these activities and to ensure their middle and long term viability.

The potential for economic growth and employment has been reflected in policy frameworks and namely in the structural funds for fisheries. In the European Fishery Fund (EFF, 2007-2013), the European Commission defines a specific line focused on the sustainable development of the coastal communities. It is the so-called Priority Axis 4, centred on coastal development through the application of initiatives and measures aimed to diversify and promote the economic development in the areas affected by the decline of the fishing activity. The EFF enabled the creation of Fisheries Local Action Groups² (FLAGs) designed to facilitate the implementation of diversification initiatives. The FLAGs give aids and advise to the promoters of initiatives which have increased the development of this kind of activities.

While diversification involves a wide range of activities³, **marine tourism**⁴ stands out above the rest, especially fishing tourism. Explanatory factors behind this relevance are: i) visibility of marine tourism's activities in coastal areas and existence of already available potential market niches; ii) relative easiness to implement tourisms activities at short term, compare with other diversification

¹ For a definition of the concept vid. Chapela, R., Ballesteros, M., Félix, J., (2011). Definition of Diversification Concept. CETMAR/UCA/AGLIA/UHU Report of Project PRESPO, pp. 4.

² Website of the Spanish Network for Fisheries Local Action Groups www.gruposaccionlocalpesca.es

³ Diversification database of the PRESPO project. Available at <http://webs.cetmar.org/prespo/> and from the Prespo's Website <http://www.cripsul.ipimar.pt/PRESPO/>

⁴ Defined as activities developed by professionals of the sea, designed to enhance and disseminate their work in the marine environment, as well as customs, traditions, heritage and marine culture.

fields which require higher investments and medium term implementation; iii) know-how, skills and capabilities required do not constitute an entry barrier⁵; iv) impact on the media; v) acceptability by coastal communities and preference vs. other diversification activities as for instance aquaculture.

In this report the concept of marine tourism is defined as activities developed by professionals of the sea, designed to enhance and disseminate their work in the marine environment, as well as customs, traditions, heritage and marine culture.

In Europe, Italy⁶ has been pioneer on fishing tourism and ichthyotourism, being the first country who provided a legislative framework for the development of these activities. Similarly, several initiatives in the European Union have tried to promote regulations for marine tourism, either at Member State level (France, Spain) or jointly at European level (Littoral, Programme Equal II). Those have evolved in parallel to a growing pressure from public authorities to diversify fishing activities, and the pressure from the sector to overcome structural and temporal crisis. However the attempts initiated at the beginning of this century to regulate marine tourism have not been successful yet. Recently in France⁷ it has been set up a working group on this topic integrated by the Public Administration, fishermen and technicians. On the other hand, national legislation does not include diversification activities in Spain. Especially noteworthy is that at regional level, Galicia⁸ has included within its fisheries law a definition of marine tourism⁹ activities.

Besides the regulatory problems, many initiatives have flourished along the coast of the Atlantic Arc. Some are promoted by the fisheries sector and more based on a voluntary than business approach. Others, closer to the tourist sector, lack the link with the fishing community that gives strength to the socioeconomic diversification. Comparative analysis in the Atlantic Arc underlines both, the plurality of initiatives developed and the absence of reliable information to assess its economic and social viability. Simplifying, we could say that we are launching a product to the market without knowing if there is a market for it. To overcome this situation, a potential demand analysis for marine tourism in the Spanish Atlantic Arc has been developed. This report summarizes the results of the study, aiming

⁵ Nevertheless skills and capabilities are critical for success and viability of the marine tourism activities.

⁶ Law 10th February 1992, nº 165.

⁷ In press (May 2012).

⁸ Fisheries law of Galicia 11/2008, 3rd December modified by Law 6/2009, de 11 December.

⁹ Activities developed by fishermen associations.

to support on-going and forthcoming projects answering the following questions: what are the most demanded activities, what is the profile of the potential users, which are the threshold prices, etc. Accordingly, the study means a pioneer and positive contribution to both the fishing and coastal communities and the capabilities for sustainable growth in the Atlantic Area.

2. Methodology and survey technical specifications

The potential demand analysis of marine tourism activities in the Spanish Atlantic Arc is based on a survey¹⁰ to prospective customers; the target population includes external and local demand, gathering information on to what extend they knew the current services supply, what kind of products they would demand, their level of interest and the price they would be willing to pay for them. The survey technical specifications are detailed in the following table.

Table 1. Survey technical specifications.

Scope	Spanish Atlantic Arc: Regions of Asturias, Cantabria, Bask Country, Andalusia and Galicia.	
Sampling method	Simple random sample	
Data collection	Personal interview in tourist areas of coastal communities	
Design	CETMAR and UCA	
Implementation	Díaz & López and Insoga	
Field work dates	June to August 2011	
Total Sample	1529 people	
PRESPO partner	Population reference*	Sample
	Tourists in Galician coastal communities	445
	Tourists in Asturian coastal communities	159
	Tourists in Cantabrian coastal communities	145
	Tourists in Basque coastal communities	130
	Tourists in Andalusian coastal communities	450
	Residents in Andalusian coastal communities	200
CETMAR		
University of Cádiz		

* NOTE: There are no disaggregated data available for the number of tourist in coastal communities. Population and sample among regions has being based on the number of travellers and overnight stays of the Instituto Nacional de Estadística www.ine.es For aggregated data at Regional level visit the site of the Instituto de Estudios Turísticos www.turismoencifras.info

The questionnaire designed for the survey has been structured in two blocks:

- General profile and socio- demographic characterization;
- Demand profile:

¹⁰ Field work has been developed by Insoga and Díaz&Lopez companies (services suppliers).

- Degree of knowledge of marine tourism activities: If tourists already know this kind of activities and if they have participated in any;
- Characterization of the demand: to identify their interest in participating, the duration and the acceptable price. Moreover, it will provide information about the best way to disseminate these activities and reach the target public;
- Use intention: to identify the seasonal availability of the interviewees to participate in a marine tourism activity.

Following the overall philosophy of the PRESPO project, the partners involved in the potential demand analysis for marine tourism activities have used the same methodological approach, nevertheless introducing adaptations to answer critical questions at regional level.

In this particular study, the field work covering the North/West Spanish Atlantic Arc includes as target population tourist having their holidays in coastal communities of four different regions: Galicia, Asturias, Cantabria and the Basque Country. On the other hand, the field work covering the South Spanish Atlantic Arc includes both, tourist and residents in coastal communities of Andalusia. The comparative analysis between tourists and residents will facilitate the identification of differences on their demands (Figure 1.).

3. Results

Adverse situations have been often used for the introduction of changes and innovation. In the fishing communities, the scenario of “permanent crisis” due to structural factors of the last decades is being aggravated by temporal ones as pointed out in the introduction. The search for solutions and alternatives has come from two main actors:

- The fishing sector has reacted considering new ways of developing the fishing activity, particularly in those areas suitable for improvement as commercialization and organization; but also including new activities that could complement it, within which marine tourism activities were the most frequent;
- The public authorities at regional, national and European level have promoted through public funding and support the development of new activities that restructure the sector and help to overcome the critical situation of fishing communities.



Universidad
de Cádiz

PRESPO GT_4_QUESTIONNAIRE. FISHING-TOURISM AND MARINE-TOURISM

2011



Read out: Fishing-tourism refers to all the activities that are related to fishing as such (for example: boat trips, fish watching, learning about and taking part in fishing activities)

- 16.** Give your degree of interest in fishing-tourism activities, on a scale from 0 to 10 (10 being the maximum), and say how long (in minutes) and how much money (in euros) you are willing to spend. *Introduction by the interviewer: We are going to ask about a package tour, so we need answers to the following questions:*

ACTIVITIES	INTEREST (0 - 10)	HOW MUCH TIME WOULD YOU SPEND ON IT? (Minutes)	HOW MUCH MONEY ARE YOU WILLING TO PAY PER PERSON?
1. 1. Boat trip + an explanation of maritime culture.		_____ Minutes	_____ €
2. 2. Boat trip + an explanation of maritime culture + taking part in a demonstration of fishing.		_____ Minutes	_____ €
3. 3. Boat trip + an explanation of maritime culture + taking part in a demonstration of fishing + eating the fish on board the boat.		_____ Minutes	_____ €
4. 4. 4. Boat trip + an explanation of maritime culture + taking part in a demonstration of fishing + eating the fish in a Restaurant.		_____ Minutes	_____ €
5. 5. Boat trip + recreational fishing activity.		_____ Minutes	_____ €

- 17.** Have you taken part in any of these activities?

1. ☐ YES 2. NO (question 18)

17.1 Which? _____/_____/_____/_____/_____/_____

17.2 Where (Towns)? _____

17.3 Give your degree of satisfaction:

1. ☐ High 2. ☐ Average 3. ☐ Low

- 18.** Would you like to take part in them in this town?

1. ☐ YES 2. ☐ NO (Question 20)

- 19.** With whom would you mainly take part in these activities? (One reply)

1. ☐ Alone
2. ☐ Spouse/partner
3. ☐ Spouse/partner and children
4. ☐ Friends
5. ☐ Other: _____

3



ATLANTIC AREA Transnational Programme
ESPACIO ATLÁNTICO Programa Transnacional
ESPACE ATLANTIQUE Programme Transnational
ESPAÇO ATLÂNTICO Programa Transnacional



European Union
European Regional
Development Fund

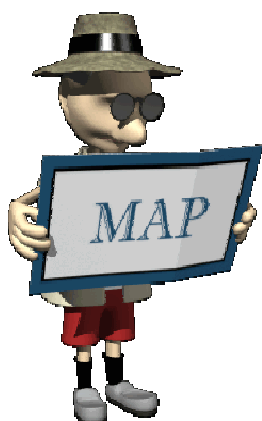
"Investing in our common future"

Figure 1. Questionnaire designed for the analysis of marine tourism in the Spanish Atlantic Arc.

Combining both lines of action, a great amount of marine tourism initiatives were set up in the framework of the Axis 4 of the European Fisheries Fund since 2007. As a result, the supply of marine tourism activities has increased but without considering the potential demand. Consequently this has led in many cases to the overlap of the supply and the closure of activities and initiatives by the absence of demand and the lack of business orientation. The potential demand analysis provides essential information to countervail this tendency, allowing promoters and business to adjust the supply of services to consumers needs and therefore improving prospects for sustainable in the medium and long term.

3.1. Demand profile in the Spanish Atlantic Arc

The four regions included under the North Spain Atlantic Arc (Asturias, Cantabria, Galicia and the Basque Country) present some particularities. For instance, in the case of Cantabria the Internet is the most widely used system to organize the holidays. It is also relevant to note that in Galicia, the tourist have a house (29%) or stay with a relative/friend (27%) and justify their choice due to weather (36%). Nevertheless, considered jointly there are two factors to be taken into account for marine tourism activities: the added value of cultural issues based on patrimony and maritime cultural heritage (including gastronomy); and the attractiveness of value added experiences for holidays of mid-term duration (14 days).



North Spain Atlantic Arc. Tourist Profile

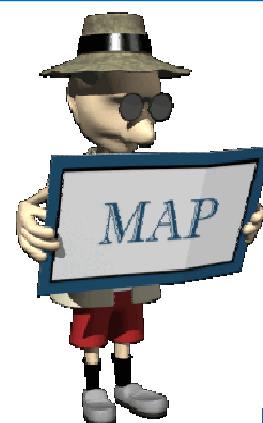


- Season: 85% between July and August
- Average duration: 14 days
- Travel plan: self-organized (69%)
- Travel group: partner or family
- Average expenditure per person/day: + 40 € (43%)
- Accommodation: hotels
- Main reason to visit: **cultural** (30%)

South Spain Atlantic Arc. Tourist Profile



- Season: 93% between July and August
- Average duration: 18 days
- Travel plan: self-organized (88%)
- Travel group: partner or family
- Average expenditure per person/ day: +40€ (55%)
- Accommodation: equitable share among hotels, rented house, own house, etc.
- Main reason to visit: the **weather** (66%)



Summarizing, there are two basic differences between tourists at the North and South Atlantic. First, the choice of the South is due to "sun and beach" tourism (weather), while in the North motivation is culture. Second, the average expenditure of southern tourists per day is higher.

3.2. Potential demand for activities related to the sea

Contrary to expectations less than 28% of the interviewees in the Spanish Atlantic Area have participated in activities related to the sea. However, this limited participation is not explain by a lack of interest since among those who affirm that they do not participate near 38% declare that they would like to. Therefore, the potential demand for this kind of activities raises until the 65% (Figure 2). Disaggregated data by regions points out that the potential demand varies: Galicia shows the greatest potential demand (66%), followed by Asturias (58%) and Andalusia (53%); the Basque Country (28%) and Cantabria (24%) reach significantly lower levels.

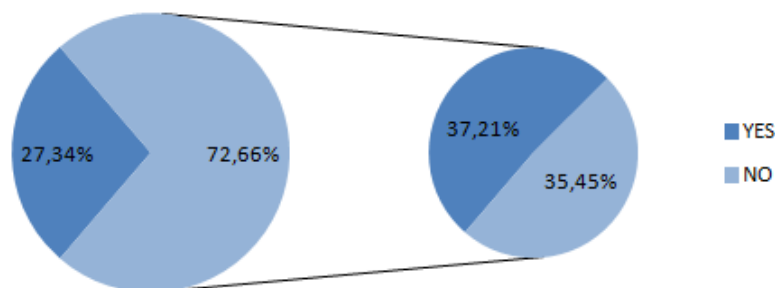


Figure 2. Participants in activities related to the sea/people who would like to participate.

3.3. Knowledge of marine tourism activities

Marine tourism activities are relatively new and their knowledge varies widely depending on the region. In the case of the Spanish Atlantic Area, 31% of interviewees already know some. In the breakdown of results by regions (Figure 3), Andalusia (42%) is the region with the highest rate and Galicia (20%) the lowest. The Galician results are surprising as it is the Spanish region with more diversification initiatives related to marine tourism; in fact this could be an indicator of the failure in communicating and advertising those activities to the potential demand.

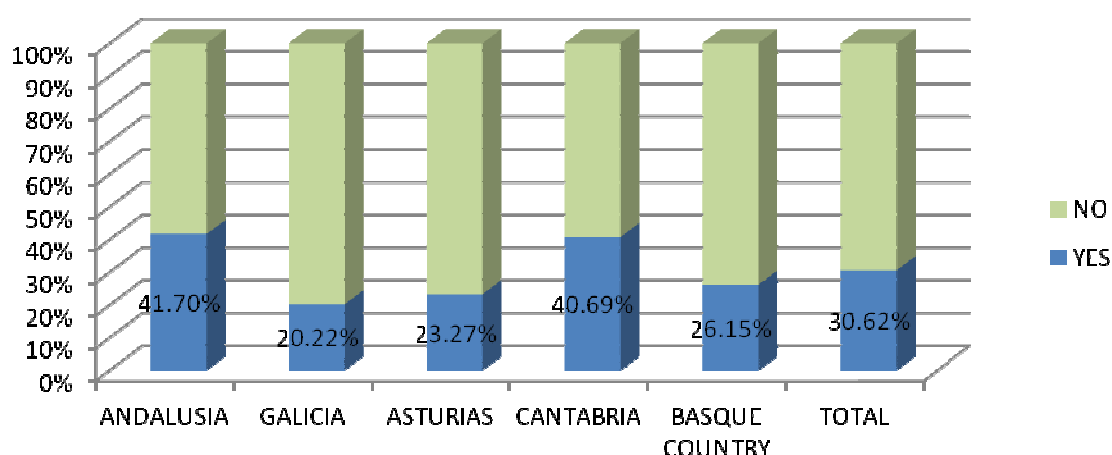


Figure 3. Knowledge of marine tourism activities in the Spanish Atlantic Area.

Regarding dissemination, one of the main reasons for the low publicity of this kind of activities (Figure 4) is the communication and advertising channel. The usual mechanism by which tourist/residents get information about marine tourism activities is advertising and recommendations offered by friends and family (main response in the category others). The Internet has been the source of only 7% of the interviewees.

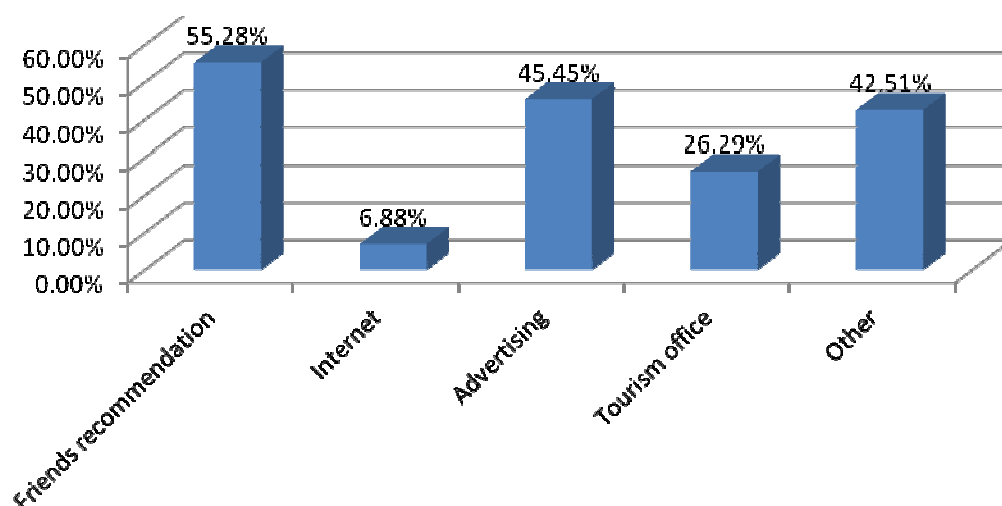


Figure 4. Main information sources identified to know about marine tourism activities.

Knowledge also diverges among type of initiatives¹¹. Covering the whole set of activities available (Table 2) the highest scores in popularity are boarding tourists (fishing tourism, 57%), following by far by talks (18%) and visits to museums, auctions or interpretation centres (15%). The identification of

¹¹. Noteworthy that the survey in the Spanish South Atlantic Arc only gathered information regarding fishing-tourism.

diversification as fishing tourism, its added value and the media coverage have clearly reinforced its dissemination and knowledge.

3.4. Activities carried out by interviewees

Once the degree of knowledge of marine tourism activities (Table 2.) has been identified, it is congruous to analyse the participation in each of the initiatives available (therefore their preferences) and their level of satisfaction. Coherently with the aforementioned arguments fishing tourism is the best-known activity, being also the most practiced (boat trip + cultural explanation 23%); with a significant distance ranking second and third are visits to museums, auctions and interpretation centres (8%) and land routes (5%).

These results coincide in both areas, although in the North it is appreciably higher the number of tourists who have participated in a boat trip with cultural explanation, while in the South predominate land routes and visit to auctions and museums (Figure 5.).

Table 2. Typology of marine tourism activities.

Marine Tourism Activities	
Fishing-tourism	<ul style="list-style-type: none"> - boat trip +cultural explanation - boat trip+ cultural explanation+ fishing demonstration - boat trip + cultural explanation + fishing + tasting on board - boat trip + explanation + fishing + tasting in a restaurant - boat trip + recreational fishing activity.
Land Routes	<ul style="list-style-type: none"> - guided routes by feet around the port and fish market surrounding areas - guided routes by feet around the shellfish gathering spots - guided routes by feet to places of particular marine and maritime interest
Training workshops	<ul style="list-style-type: none"> - marine and maritime topics - environmental awareness - skills and capabilities
Marine culture talks	Presentations that address culturally-responsive approaches to marine issues
Buying crafts	
To stay at fishermen homes	
Visits to auctions, museums, etc.	
Culinary workshops	

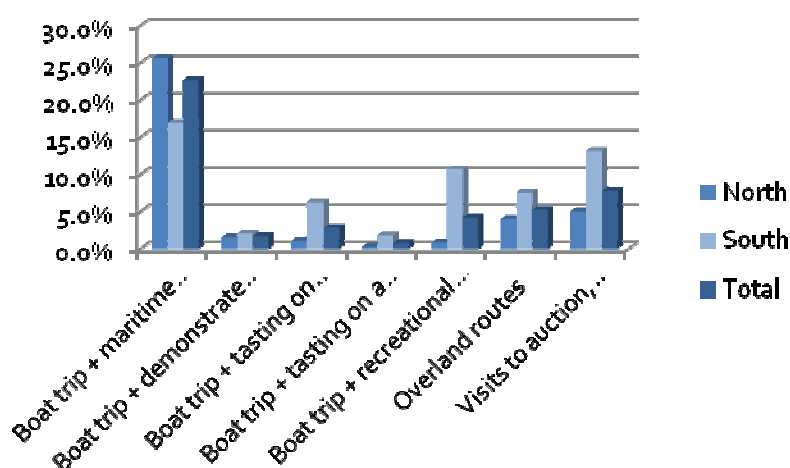


Figure 5. Marine tourism activities.

In the South analysis, data from residents evidence a greater presence of land routes and visits to auctions, museums and interpretation centres, higher that among tourists. This may be due to a better knowledge of the plurality of supply in their area and the lack of knowledge declared by the tourist subgroup (see 3.3).

Finally, the satisfaction (utility) of the participants in the marine tourism activities was analyzed using the perceived quality of service. Under the premise that perceived quality of services leads consumer satisfaction, marine tourism activities reach a substantial degree of satisfaction (87% consider that services have high quality); only 3% noted a low quality of service. According to Kotler (2002), this result (87%) seems to note the achievement of an augmented service where the expected service by the user –the participants in the marine tourism activity- is surpassed by the final one provided.

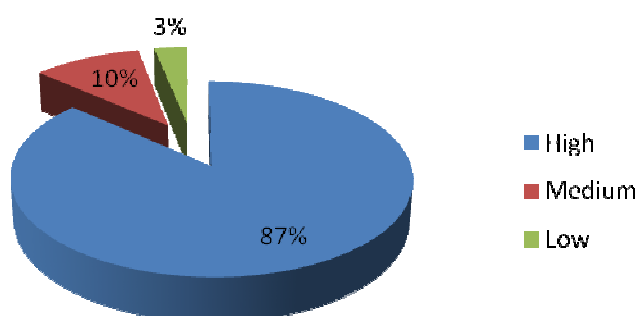


Figure 6. Users' degree of satisfaction.

3.5. Characterization of the demand

The potential demand analysis developed includes an analysis of the kind of services required by tourists to turn them in potential customers of marine tourism activities. The results show that demand for certain products is directly linked with its specific characteristics (activities included and time), and price. Therefore, it would be pointless offering not claimed services, or with inadequate duration and/or price. The output of this analysis provides information to those promoters or companies who want to carry out a feasibility study for marine activities, since they can adjust their supply to the potential demand.

Five products related to fishing tourism have been offered to potential consumers, adding to the boat trip the following services: (1) explanation of the marine culture, (2) fishing demonstration, (3) fish tasting on board, (4) fish tasting in a restaurant, (5) recreational fishing (as defined in section 3.4). The most important variables to participate in a marine tourism initiative and therefore become a potential client are the following:

- Interest in the activity, to select a value on a scale [0 to 10];
- Amount willing to pay in euros;
- And estimated time, in minutes.

The combined results of these three variables (see table 3) were calculated from the answers of the interviewees who had interest in an activity. The values of interest equal to zero and those expressing interest but without willingness to pay for services have been removed. Besides, due to similarities in results among the different regions of the northern Spanish Atlantic Arc, the analysis of the variables has been made through a comparison between North and South Areas.

The results of this table show that the number of interviewees interested in marine tourism activities is higher than 50%, except in the case of boat trip and recreational fishing activity in the North, with marked differences among offered services. In this sense, the potential demand would focus on activities related to explanation of **marine culture** (1) and **gastronomy** (3 and 4). Less interest has been declared in those related to fishing, either to participate in a fishing day (2), either in recreational fishing (5), maintaining the order of preferences between tourists from the North

and South. In general, the degree of interest is lower in the North, with the exception of boat trip with cultural explanation.

In relation to their level of interest, they have expressed a **medium-high interest**; consequently, we could affirm that marine tourism activities are attractive for tourists. By kind of initiative, **boat trip with tasting on board** is the most attractive activity, both in the North (7,77) and South (8,09). Nevertheless, there is a substantial difference between the two areas of the Atlantic Arc: in the North, the level of interest is similar among all the activities proposed, being the lowest 7.06 and the highest 7,77. In the South is a little wider from 6,93 to 8,09 respectively.

The amount that users are willing to pay for participating in a marine tourism initiative is also included in Table 3. In both areas the most valued activity in economic terms is the **boat trip including tasting of products in a restaurant**, **39,24€** in the South and **31,3€** in the North. The less valued activity is the boat trip with a cultural explanation, 20,08 € in the South and 13,65€ in the North. These results coincide with reality, since the marine tourism activity with more services is more expensive and the one with fewer services is also less expensive. As a rule, interviewees in the South have a greater willingness to pay, an average of 7€ more than in the North.

In terms of time, the duration of activities follows the same line of price results, highlighting the difference between the data from the North and South. In the North, the duration ranges from two hours (124,80 min) to four hours (252,60 min), whereas in the South times are lower, from an hour and a half (82,57 min) to three hours (161,21 min).

A simple indicator that combines the percentage of potential customers to their degree of interest is shown in figure 7, as a product of both values, expressed in a range of 0 to 100. This indicator is called degree of potential customers.

The activities supply is adjusted to the average of prices and duration of activities expressed by consumers. The most demanded activities are activity 1 (boat trip and cultural explanation) and activity 3 (boat trip, cultural explanation, fishing demonstration and tasting on board). However, activities related to participation in an extractive activity, fishing demonstration (2) or recreational fishing (5), have a lower potential demand, particularly in the North.

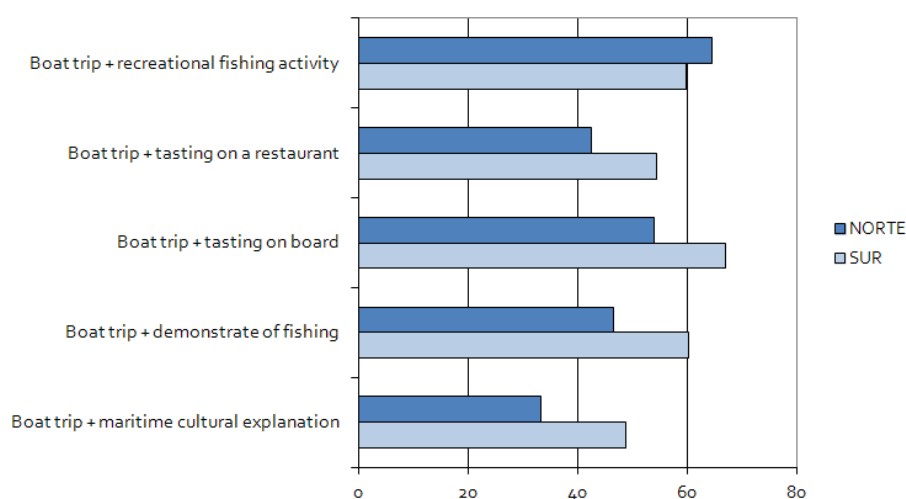


Figure 7. Indicator of degree of potential customers.

In the South, there are substantial differences in the level of interest and willingness to pay among the major fishing ports and marinas that is summarized in the Figures 8 and 9.

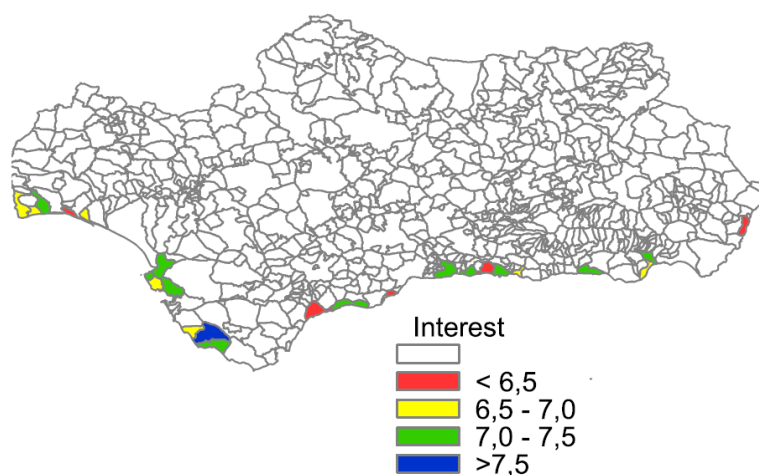


Figure 8¹². Interest in boat trip with cultural explanation in Andalusia.

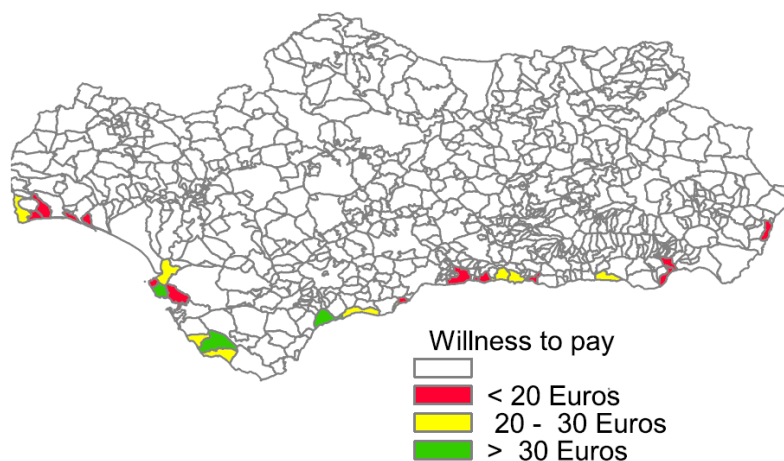


Figure 9¹³. Willingness to pay for a boat trip with cultural explanation in Andalusia.

¹² Developed by A. García Andaluz.

The results of price and duration reveal two opposite trends: in the north users want to enjoy more time but at a lower cost, while in the South they are willing to spend more for a shorter activity. For Andalusian residents, the outcomes of interest, price and time are placed in terms almost identical to the tourists in the area.

Table 3. Interest, time and cost for participating in a marine tourism activity.

	SOUTH				NORTH			
	Percentage	Interest	Minutes	Price	Percentage	Interest	Minutes	Price
Boat trip + maritime cultural explanation	86,5%	6,93	82,57	20,08 €	89,1%	7,26	124,80	13,65 €
Boat trip + maritime cultural explanation + participate in a fishing demonstration	77,1%	7,06	101,57	24,10 €	60,3%	7,06	217,20	22,44 €
Boat trip + cultural explanation + fishing demonstration + tasting on board	82,8%	8,09	155,98	36,19 €	69,6%	7,77	252,60	31,13 €
Boat trip + cultural explanation + fishing demonstration + tasting ion a restaurant	78,3%	7,70	161,21	39,24 €	66,3%	7,03	250,80	31,34 €
Boat trip + recreational fishing activity	66,9%	7,29	130,50	29,03 €	46,9%	7,10	236,40	21,57 €

Source: PRESPO project, 2011.

4. Conclusions

The aim of this study is to develop a potential demand analysis for the marine tourism activities in the Spanish Atlantic Arc. Its outputs provide operative information for business and promoter of these initiatives, who have useful information that allows them to know the degree of interest, willingness to pay and recommended duration of the marine tourism activities. Thereby they can adjust the supply of the activities to the potential consumer demand, the tourist. Although the results are a general overview and specific studies for each case are strongly recommended, the promoter can direct its activity towards initiatives that have more acceptance among the tourist and therefore guarantee higher revenues and viability in the medium term. Summarizing, the main conclusions of this study are:

- **65%** of tourists who enjoy their holidays in a coastal town of the Spanish Atlantic Arc show **interest in marine tourism activities**. This contrasts with the percentage of tourists who carries out activities related to sea which is lower than 30%. It would be advisable to implement measures to facilitate the participation in marine tourism initiatives to that potential demand;

¹³ Ibidem

- There is a **wide range of marine tourism activities unknown by many tourists**. Probably, because of the absence of a dissemination strategy that allows to announce activities outside its area of influence. The method most commonly used to get information on these initiatives is through recommendations from friends or family, and advertising in the tourist offices. Therefore, it would be important to take advantage and optimize the presence in the Internet and social networks, allowing access to a large number of people with a very low cost, even zero;
- **Boat trip with maritime cultural explanation is the most known and performed activity**. There are other activities such as visits to auctions, museums and interpretive centres also known but to a lesser extent;
- Nearly **90% of interviewees who have participated in a marine tourism activity are very satisfied with the experience**. The good image of these initiatives is a mechanism that facilitates the future realization of an activity by the same user or her/his family or friends;
- There is a manifest interest to participate in marine tourism activities. Depending on the activity the participation ranges from 89% to 47% in the North and from 86% to 67% in the South. The most demanded activities are the boat trip with explanation of the marine culture followed by those with tasting activities. In the North, the potential customers prefer boat trip with cultural explanation while in the South they prefer initiatives that include fish tasting, especially on board;
- The price and time increases as services are added. The boat trip with tasting in a restaurant is the activity that provides more services; therefore, it is the activity with the highest costs;
- The level of interest for the performance of a marine tourism activity is high. With the exception of boat trip with marine cultural explanation in the South, all activities are above 7.

5. References

- Chapela, R., Ballesteros, M.A., Félix, J., Dominguez, J.M., Jimenez, M. 2011. El turismo marineró, nuevas actividades de diversificación para las comunidades costeras en Andalucía y Galicia, *I congreso iberoamericano de gestion integrada de areas litorales*, Cádiz.
- Chapela, R., Ballesteros, MA, Felix, J., Dominguez, JM, Delamare, A., Toribio, R., Castilla, D. 2011. Definition of the concept of Diversification, *PRESPO project. Report of the project*.

Council Regulation (EC) No 1198/2006 of 27 July 2006 on the European Fisheries Fund. Italian legislative framework: Law 10 of February 1992, nº 165.

Kotler, P., 2002. Marketing Management, *Prentice Hall*, 11 edition.

Law 11/2008, 3 of December for fishing.

National Statistical Institute (INE), 2011. Survey of occupancy in tourist accommodation, INE.

PRESPO project: <http://www.cripsul.ipimar.pt/PRESPO/>

Spanish Network of Fishing Local Action Groups: <http://www.gruposaccionlocalpesca.es>

6. Annex I

Table 4. Participants of activities related to the sea.

	ANDALUSIA	GALICIA	ASTURIAS	CANTABRIA	BASQUE COUNTRY	TOTAL
YES	36,62%	29,44%	16,98%	8,97%	6,92%	24,68%
NO	63,38%	70,56%	83,02%	91,03%	93,08%	75,32%

Table 5. Consumers who will participate in activities related to the sea.

	ANDALUSIA	GALICIA	ASTURIAS	CANTABRIA	BASQUE COUNTRY	TOTAL
YES	15,38%	36,40%	40,88%	14,48%	20,77%	25,58%
NO	48,00%	34,16%	42,14%	76,55%	72,31%	49,74%

Table 6. Knowledge of marine tourism activities.

	ANDALUSIA	GALICIA	ASTURIAS	CANTABRIA	BASQUE COUNTRY	TOTAL
YES	41,70%	20,22%	23,27%	40,69%	26,15%	30,62%
NO	58,30%	79,78%	76,73%	59,31%	73,85%	69,38%

Table 7. Main media to get information of marine tourism activities.

	ANDALUSIA	ASTURIAS	CANTABRIA	BASQUE COUNTRY	GALICIA	TOTAL
Friends recommendation	35,06%	40,54%	13,56%	5,88%	40,00%	55,28%
Internet	4,80%	5,41%	1,69%	-	3,33%	6,88%
Advertising	21,40%	18,92%	42,37%	52,94%	44,44%	45,45%
Tourist office	8,49%	32,43%	49,15%	73,53%	3,33%	26,29%
Others	30,26%	13,51%	20,34%	17,65%	14,44%	42,51%

Table 8. Marine tourism activities performed.

	NORTH	SOUTH	RESIDENTS	TOURISTS
- Boat trip + maritime cultural explanation	25,60%	16,89%	22,65%	17,60%
- Boat trip + cultural explanation + fishing demonstration	1,50%	2,00%	1,66%	7,20%
- Boat trip + cultural explanation + fishing demonstration + tasting on	1,00%	6,22%	2,78%	11,20%
- Boat trip + cultural explanation + fishing demonstration + tasting in a	0,20%	1,78%	0,75%	4,40%
- Boat trip + recreational fishing activity	0,80%	10,67%	4,14%	20,00%
- Overland routes	4,00%	7,56%	5,19%	17,20%
- Visits to auction, museums, etc.	5,00%	13,11%	7,75%	23,60%

Table 9. Other marine tourism activities in the Northern Spanish Atlantic Arc.

	NORTH			
	Percentage	Interest	Minutes	Payment
Overland routes	57,10%	7,20	221,40	11,57
Training workshops	34,90%	5,91	127,80	10,91
Marine culture talks	21,60%	5,81	93,00	7,92
Buying crafts	52,20%	2,94	85,20	24,92
To stay at fishermen homes	74,50%	6,02	3 days	40,14
Visits to auctions, museums, etc.	72,80%	7,13	127,20	8,39
Culinary workshops	69,50%	7,21	150,00	16,64

Table 10. Interest, time and cost for participating in a marine tourism activity in Galicia.

	Percentage	Interest	Minutes	Payment
Boat trip + maritime cultural explanation	86,70%	7,60	166,80	16,88
Boat trip + maritime cultural explanation + participate in a demonstrate of fishing	66,10%	7,60	254,40	25,33
Boat trip + maritime cultural explanation + participate in a demonstrate of fishing + tasting on board	72,40%	8,10	298,80	33,09
Boat trip + maritime cultural explanation + participate in a demonstrate of fishing + tasting on a restaurant	64,90%	6,89	286,20	32,79
Boat trip + recreational fishing activity	52,40%	7,50	265,20	27,38
Overland routes	60,00%	7,17	276,60	13,67
Training workshops	40,00%	6,44	167,40	12,15
Marine culture talks	26,30%	6,21	109,80	8,75
Buying crafts	55,50%	3,28	81,00	23,01
To stay at fishermen homes	62,90%	7,57	4 nights	32,90
Visits to auctions, museums, etc.	62,00%	6,97	134,40	8,93
Culinary workshops	67,40%	7,73	193,80	17,26

