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The CATCH Provider Survey Report

An Analysis of the Provider Side and
Existing Offers on Coastal Angling
Tourism in the South Baltic Region

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We would like to thank all project partners and providers for sharing their knowledge and inside information on the current state of offers on coastal angling tourism in the South Baltic Region.

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1 The Promising Perspective of Angling Tourism for Coastal Communities

Angling tourism is considered as a **growing niche market** for coastal destinations as it has the potential of triggering local employment and economic growth whilst protecting the interests of communities and preserving natural resources (ECORYS, 2013). Throughout European states, the significance of the potential economic impact of coastal recreational angling has been demonstrated which is why the development of coastal angling tourism should be kept pushed forward (EAA, 2018; Hyder et al., 2017).

Recreational angling in the Baltic Sea Region amounts to a direct spending of €749 million. Along with indirect and induced spending, coastal angling tourism adds up to approximately €1.5 billion of production in Baltic Sea countries. With that it provides nearly 10,000 jobs directly involved in the angling tourism sector and another 5,000 jobs in indirect and induced businesses. In the **CATCH partner countries Denmark, Germany, Lithuania and Poland** the contribution of marine recreational angling amounts to a **total production of €490 million** and nearly **5,000 jobs** in direct, indirect and induced businesses (Hyder et al., 2017). These numbers highlight the already great importance of angling tourism for coastal areas in CATCH partner countries. Still, coastal angling tourism is only a niche market of which the potential is yet unexploited and only little is known about both the demand and supply side of angling tourism in the South Baltic Region.

Being a niche market offers coastal angling tourism the opportunity to adapt to the changing demands and expectations on coastal tourism and to transform upcoming challenges into benefits. Visitors' growing interest for **sustainable tourism and authentic experiences**, the growing acceptance of **acting in an environmentally conscious manner** as well as the possibility of experiencing services and destinations **throughout the whole year** can give coastal angling tourism a decisive advantage (EASME, 2016). Coastal communities are therefore well-advised, for one, to create services that build on **local and regional strengths**, and also to attract potential visitors by taking into account their specific needs (ECORYS, 2013). In-depth analyses will help identifying these strengths and chances of coastal angling tourism.

To foster its development, the EU-project **CATCH** aims at promoting coastal angling tourism across borders by providing coastal communities with tools to establish sustainable angling tourism, defining inspiring **best practices**, fostering the **exchange and cooperation between stakeholders** via national and cross-border workshops, as well as by establishing a **multilingual information and knowledge platform on coastal angling tourism** for locals and tourists. CATCH targets the successful exploitation of the potential of coastal angling tourism with the simultaneous development and strengthening of **networks and cooperation** between service providers. As a basis for these objectives **market analyses** of both the demand and the provider side were realised to illustrate the current state of coastal angling tourism in the South Baltic Region.

Within CATCH information were gathered for the project regions in Denmark, Germany, Lithuania and Poland. In a first step, anglers from all four countries were surveyed on their habits, experiences and expectations on angling as well as touristic offers for angling trips and holidays. The results of this survey can be found in **The CATCH Angler Survey Report** on catch-southbaltic.eu or fishingsouthbaltic.eu. To complete the overall picture, service providers in all four countries were surveyed on their contribution to coastal angling tourism. Knowing the number and nature of present service offers helps to **identify standards** at national as well as international levels, to highlight exemplary **offers and cooperation**, and also **to determine shortcomings** in coastal areas and individual service categories. All information on offers, providers and more can be found on fishingsouthbaltic.eu.

The CATCH Provider Survey Report addresses the current state of coastal angling tourism in the South Baltic Region from a provider perspective. The following chapters outline the survey procedure and findings for each country. These findings are then discussed at national levels and at a cumulated level for the overall CATCH project area. Shortcomings are identified for provider categories and regions and ways for improvement suggested. As a result of **The CATCH Provider Survey Report**, coastal communities and service providers can benefit from understanding these shortcomings and using the exemplary guidelines and suggestions to develop successful strategies for coastal angling tourism.

2 CATCH Market Analysis of the Provider Side

2.1 Geographical Classification of the Market Analysis

The market analysis of the provider side of coastal angling tourism in Denmark, Germany, Lithuania and Poland was conducted on the basis of extensive national web researches and direct contact to local providers. The research was targeted on collecting information on service providers in the case study areas of the CATCH partner countries. Concentrating on the providers in the case study areas enabled a more focussed, structured and detailed analysis of all existing offers and special features of the service providers. The report therefore raises no claim to completeness or to being generalizable to all regions in the South Baltic Region.

One case study area is located in each partner country in which regional stakeholders are encouraged to come together and develop networks. These potential networks intend to empower local angling tourism stakeholders in the development and strengthening of cooperation among one another and with other industries and tourism sectors. The four case study areas represent exemplary coastal areas that offer attractive sites and services for anglers and visitors (see Graphic 1)



Figure 1: CATCH Case Study Areas in the South Baltic Region

Each case study area is characterized by its unique environmental features and different infrastructure or development of coastal angling tourism. Following, a short description of each case study area is provided. For more information factsheets of each region are available at catch-southbaltic.eu and fishingsouthbaltic.eu.

Denmark: The **Pike Factory** targets the development of sustainable angling tourism in the brackish waters of Southern Zealand and the creation of new spawning grounds for pikes. The case study area attracts anglers of all age groups not only from Denmark but also from other European countries. Visitors profit from a well-developed infrastructure in Southern Zealand and the acknowledged economical value of coastal angling. Besides offering great conditions for anglers, Fishing Zealand and the Pike Factory focus on the education and information of anglers about sustainable angling.

Germany: **Peenemünde** and its surrounding area present a great development potential for sustainable coastal angling tourism. The geographical position of Peenemünde offers ideal conditions for a variety of fish species (including herring, garfish and pikeperch) and angling methods at this new angling destination. Diverse offers for anglers of all ages, groups and families emphasize the broad positioning of Peenemünde.

Lithuania: The **Klaipėda** region offers with its diverse nature, ranging from freshwater lagoons to river deltas and the coast, and its different fish species (including cod, salmon, smelt, bream, cod, etc.) and potential angling techniques great possibilities for anglers of all ages. The region's development as a new angling destination is supported by its all year round angling opportunities and diversification of offers. This attracts not only locals but also national and international visitors.

Poland: The **Szczecin Shoreland** attracts anglers with unique angling sites and the possibility to catch perch and pikeperch (Szczecin Lagoon) and cod (Pomeranian Bay). Visitors can meet angling challenges all year and benefit from the variety of

possible angling methods. To preserve the nature and ensure long-term benefits the area is particularly committed to the protection of local fish stocks.

2.2 Characteristics of Coastal Angling Service Providers

For coastal angling tourism service providers can be classified in seven categories. These comprise boat rentals, cutter operators, angling shops, accommodation facilities, angling associations, angling guides and license management. Service providers in the four case study areas were assigned to the matching category. In many cases, providers were assigned to more than one category as they offer diverse services with regard to coastal angling tourism.

Detailed information was gathered for each provider of the categories boat rentals, cutter operators, angling shops, accommodation and angling guides, including the description of the offered services, contact and communication channels as well as languages spoken by the provider and employees. Of particular interest was information on offers specifically targeted on anglers, female anglers, juvenile anglers and/or handicapped anglers but also on special supplementary offers as well as offers for non-angling companions. The survey was completed with information on cooperation and networks with both angling and non-angling service providers, questions on sustainability considerations and actions and category-specific information. The categories angling associations and license management were considered separately from the other categories as they act on regional or national levels.

Information on service providers was collected for each case study area and for each provider category separately. Chapter 3 outlines the findings of this survey and concludes with a comparison among CATCH partner countries. Individual and transnational shortcomings are highlighted in Chapter 4. Furthermore, suggestions for improvement are discussed that can help service providers and coastal communities to enhance sustainable coastal angling tourism.

3 Existing Offers of Coastal Angling Tourism

Though angling tourism is an upcoming trend with high potential for coastal communities in the Baltic Sea Region, the development of services and offers specifically targeted at anglers differs, in part greatly, among Denmark, Germany, Lithuania and Poland. The CATCH market analysis reveals insights in available offers and infrastructure of each country which allows for 1) a separated and 2) for a comparative analysis of existing offers. Results of the market analysis are therefore first presented on national levels and subsequently on a summarized level. National results are equally structured by starting with information on boat rentals followed by cutter operators, accommodations, angling shops, angling guides, associations and angling license management. Each section ends with concluding remarks on special offers, sustainability considerations and existing cooperation in the case study areas.

3.1 Coastal Angling Services in Denmark

Compared to the other partner countries, the Danish case study area takes a special position in the market of coastal angling tourism. Angling in general is a common recreational and sport activity undertaken by anglers at all ages and the touristic potential of angling tourism in Denmark has been identified for several years. This fact is reflected in the current positioning and organization of angling service providers. In the Danish CATCH case study area numerous service providers are part of **Fishing Zealand**. Fishing Zealand is a cooperation between municipalities, Denmark's Sport Fishing Association, angling clubs, tourist organisations and local tourism organisations and businesses. Partners of Fishing Zealand agree on common value, standards and quality requirements to ensure a sustainable management of the natural environment, to improve the quality of their offers, to support recreational angling and, in particular, to involve young people in their activities.

Due to this already established system of angling tourism in Fishing Zealand a higher number of angling-related service providers can be found in the Danish case study area. Accommodation providers are highly represented in the provider list followed by angling guides and boat rentals. Graphic 2 shows the percentage distribution of coastal angling service providers in the Danish case study area:

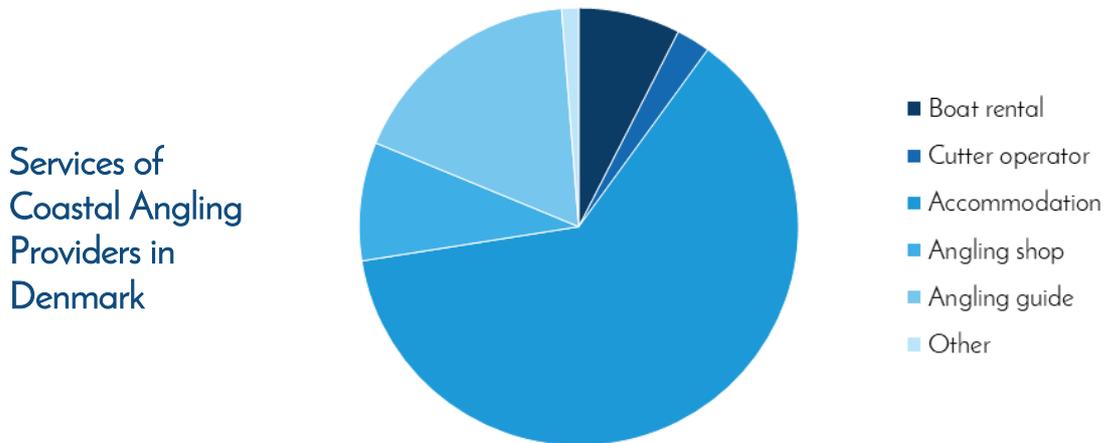


Figure 2: Service Distribution of Coastal Angling Providers in Denmark

Boat rentals offer their boats for either angling trips or boat tours and sightseeing tours. Some providers combine the categories of boat rental and **cutter operator** as this enables a broader range of offers for anglers and a broader positioning for service providers. Boat rental and cutter providers offer angling tours in the Øresund for catching cod, herring, mackerel, garfish, flatfish and more. Providers in both categories speak Danish, English as well as German.

The high number of **accommodation** providers is even extended by the fact that many providers not only rent single houses but possess holiday complexes. These comprise houses and apartments but also outdoor accommodations. All accommodations are characterised by their closeness to angling spots and the coast. Accommodations are well-resourced with features especially for anglers, including spaces for cleaning and storing fish, spaces for boats as well as flexible check-in and check-out times. They also provide information on sustainable angling and if not otherwise informed, a link to the Fishing Zealand website is provided as a minimum source of information. Accommodation providers try to create a convenient time for anglers for which they also cooperate with local boat rentals and angling guides. Services are offered in Danish, English and German. One provider also speaks French and Spanish.

Angling shops in the Danish case study area are specialised on selling angling gear and equipment to local anglers and tourists. Services are offered all year round and are available in Danish and English, and one also in German. One listed shop also organises special fishing events for anglers as well as events targeted at juvenile anglers. However, the number of angling

shops in the case study area is rather small. This can be a result of competitive providers in contiguous areas and anglers' preference of buying angling gear and equipment online.

The **angling guides** in the case study area are certified by Fishing Zealand and focus on coastal waters, mainly the coast of Zealand. Each guide is specialised on certain angling techniques, but principally on fly fishing, spin fishing and trolling. Guides reveal anglers the best spots and ways to catch sea trout, pike and perch. Angling guides do not only offer guided tours and courses for all ages and skill levels, but also involve in the education of anglers and cooperation in environmental projects. Besides angling, additional offers include sportive activities in the nature, e.g. mountain biking or kayaking. Angling guides offer their services in Danish and English, and most also in German.

Fishing Zealand cooperates with Denmark's biggest organisation for sport fisherman - the Denmark Sportfishing Association. This **angling association** represents its members in environmental and political issues, highlights the importance of reviving and maintaining the natural environment, and creates new partnerships. Their objective involves securing the future of angling by emphasizing environment sustainability. Besides this national association, Fishing Zealand cooperates with several local angling clubs. Clubs and volunteers take on intensive work to improve the conditions of angling and ensure its future existence. Their work includes the recreation of rivers, efforts on breeding and releasing as well as the spreading of knowledge among the youth and other interested parties.

In Denmark, anglers between 18 and 65 years need to buy state **angling licenses**. This is mostly done online and only a limited number of shops in the case study area sell these licenses. Instead, local shops help anglers and visitors in buying their licenses online.

Danish providers target diverse offers for all anglers. They noticeably organise various activities and events on different occasions. Especially **juvenile anglers** are targeted by many events. Offers for handicapped anglers are rare, except for one information centre and angling guide that offers quay fishing. Providers purposely make no distinction between male and female anglers and offer their services to all interested anglers and visitors. All service providers communicate their offers via their websites, whereas only few have their own Facebook page. Partners of Fishing Zealand are additionally listed on the Fishing Zealand website. Only one provider stated to be further listed on tourism websites.

3.2 Coastal Angling Services in Germany

Compared to Denmark, the German case study area is not only rather small but also a newly-developed spot for coastal angling tourism. Especially one provider has been growing its business steadily since its establishment and offers now accommodations, boats for rent, guided tours and a wide range of angling and non-angling offers for anglers and their companions at all ages. The number of further service providers is rather limited in the area. Despite its great potential for coastal angling tourism and excellent angling grounds the development of the region as a coastal angling destination has just begun. Instead most providers in Mecklenburg-Western Pomerania are located in the city and district of Rostock and the island of Rügen. Providers for coastal angling tourism can also be found in other coastal areas but in a lower density than in the touristic centres of Mecklenburg-Western Pomerania. For comparison the following paragraphs focus on service providers in the area of **Peenemünde**. As shown in Graphic 3, service provider categories are unequally distributed, which might be referred to the limited geographic reach.

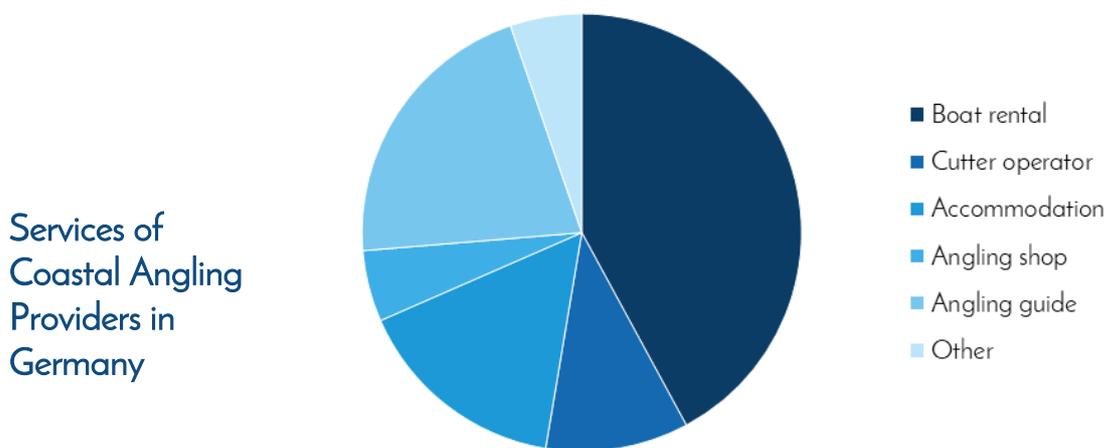


Figure 3: Service Distribution of Coastal Angling Providers in Germany

Boat rentals are the most represented category in the German case study area. Dependent on the size of the business boat rentals offer a wide range of boats varying from small boats suitable for bodden waters to bigger, better equipped boats for open waters all year round. Anglers can rent the boats for day trips or some even for longer trips. Most boat rentals are located at one landing stage, however, some are flexible to wishes of anglers and guests,

and launch their boats at additional places. Usually, service providers concentrate on more than renting boats. They combine their offers with accommodation or guiding services. Those, who do not offer accommodations themselves, cooperate with other providers and provide a link on their website. Supplementary offers of boat rentals may include the provision of relevant information on angling grounds, fish species and techniques, but also providing cleaning facilities for fish. Providers offer their services mainly in German and only rarely in English.

Cutter operators are rarely found in the German case study area. Existing tours are offered for up to 6 persons and target at herring, garfish, pikeperch and perch. Offers are combined with boat rentals and guiding services and are mostly offered in German.

Visitors can choose between various **accommodation** types. This includes camp sites, apartments or cottage houses. Angling specific features are not always available. Whereas some offer everything from cleaning facilities to storage facilities, others offer none of these features. Accommodations are often added to other services such as boat rentals. Providers speak German and in part English.

Similar to cutter operators, **angling shops** are rare in the German case study area. Shops offer a wide range of angling equipment. Some provide facilities for courses for angling licences and exams. Additionally, they provide customers with necessary information on fish species, closed seasons and nearby angling spots. Additional offers of angling shops can sometimes include accommodation or boats for rent. Services are offered in German.

As implied in the preceding categories, **angling guides** often work together with boat rentals, some also with accommodation services. Guides offer half-day or one-day tours on the Peenestrom and bodden waters, both for single anglers and groups. Depending on personal preferences, anglers may choose between, for example, tours on trolling or spin fishing, and on tours for catching pike, perch, sander, cod, garfish etc. Services are mainly offered in German, few in English.

Anglers in Mecklenburg-Western Pomerania are organised in one regional **angling association** (LAV MV e. V.) and its numerous member district associations and angling clubs. The associations and clubs represent their members in all issues on water and nature protection. Their objectives include the preservation and care of waters and fish stocks as well as the stimulation of community activities. Furthermore, seminars for licence exams are offered and all necessary information on angling is provided for club members. One key element of the work of

clubs and associations is the involvement of young anglers by organising angling camps, events and competitions.

In Mecklenburg-Western Pomerania anglers are required to hold two documents to be allowed to fish in coastal waters. Anglers from the age of 14 either need a permanent **angling licence** which involves taking an exam, or a tourist angling permit which is valid for 28 days. Tourist angling permits can be purchased at local regulatory authorities as well as at tourist offices or local tourist administrations. Additionally, anglers need an **angling permit** for the respective waters. Holders of a valid (tourist) angling permit can purchase day, week or annual licences for coastal waters online or at angling shops, tourist offices and administrations, or at few angling clubs.

Information on **sustainability** issues are only few for German angling service providers. If existing, measures concentrate mainly on the environmental dimension of sustainability, including recycling or conservation of energy and other resources. Offers for female or handicapped anglers are seldom promoted. Similarly, offers for children or juvenile anglers as well as anglers' non-angling companions are limited.

Offers from service providers are characterized in that they are mainly listed by single providers. **Cooperation** between service providers sometimes exist but are often limited to links on provider websites. Services are generally promoted via **web presences**. More than half of providers use additional channels such as Facebook, YouTube or Google+.

3.3 Coastal Angling Services in Lithuania

The Lithuanian case study area covers the region around **Klaipeda and Nida**. In this area service providers pursue different strategies. Providers in the category of angling guides and most cutter operators have focussed on their services with only some additional, non-angling related offers. Providers classed in the other categories have usually diversified their offers and offer services from more than one category plus additional non-angling offers. The distribution of providers shows a high ratio of cutter operators and angling shops followed by boat rentals and accommodation services (see Graphic 4).

Services of Coastal Angling Providers in Lithuania

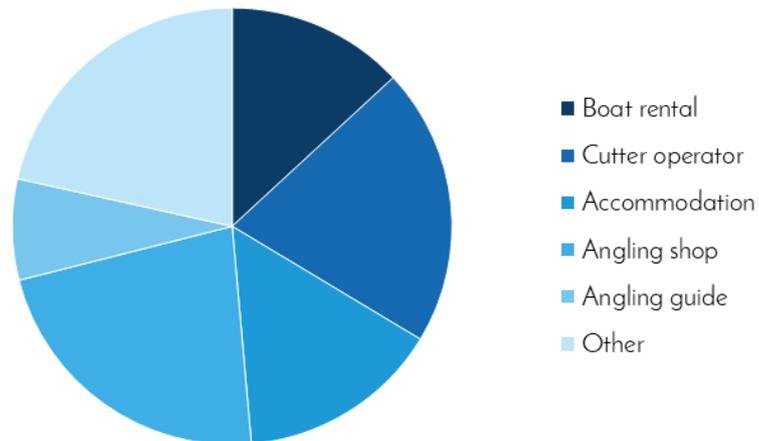


Figure 4: Service Distribution of Coastal Angling Providers in Lithuania

Boat rentals in the Lithuanian case study area offer boats of different sizes and capacities to single anglers and groups. Renting boats to anglers is mostly accompanied by services of other categories, especially hospitality businesses but also guiding services and cutter operators. Boat rentals often promote additional non-angling offers including boat trips and sightseeing, sporting activities or they even offer their boats as event locations. All providers in this category offer information and services in Lithuanian and Russian, most also in English and few in German.

Cutter operators offer tours all year round for fishing cod in the Baltic Sea or perch and sander in the Curonian lagoon. Tours for catching salmon, perch, bream or brown trout are also realised by service providers. For an overall satisfying angling experience some cutter operators add catering and equipment rentals to their tours. Providers in this category usually focus on their main business, except for few that offer additional guiding services or boat rentals. For full utilization of their boats, cutter operators often provide their boats for trips, festivities, congresses, excursions or other leisure activities such as water or extreme sports. Cutter operators offer their services in Lithuanian and Russian, half of them also in English and single providers also in German or Polish.

Accommodation providers in the Lithuanian case study area pursue different strategies. Existing providers need to be distinguished in two groups, one that highly depends on bookings by anglers and one that regards anglers as one of several groups of customers. The first group registers bookings by anglers of over 60% and is highly specialised on their needs. Most are

located at the Curonian lagoon, with a distance of about 40km to the coast, or directly at the Baltic Sea coast. Further inland or river angling spots can be close. Accommodation providers in this group additionally offer boats for rent and angling trips for their visitors. As providers hold all these services themselves, further cooperation does not exist. Services are offered in Lithuanian, Russian, mostly English and some also in German or Polish. The second group of accommodation providers records 15-30% of bookings by anglers. They rent houses and places on camping sites all year. Despite the lower number of anglers, providers still offer necessary features for anglers including freezers, places for cleaning fish, smoke houses, etc. Further offers for anglers include the organisation of angling trips, guided tours, excursions as well as the transportation to the angling spots. For the non-angling company boat tours, leisure activities or water sports courses are offered. Similar to the first group, providers in the second group speak Lithuanian, Russian, English, and also German.

The **angling shops** in the Lithuanian case study area mainly focus on selling angling equipment and clothing. Many also offer supplies for navigation and water activities. Single shops also carry supplies for hunting, boats or boat accessories. One organises angling trips and boat tours as well as rents of the respective angling gear. While all listed stores can be found locally, half of the stores additionally offer their assortment online. All providers speak Lithuanian, English and Russian.

Angling guides offer tours at the Baltic Sea and the Curonian lagoon all year round. Dependent on the location and season guides instruct anglers on catching different fish species, including cod, smelt, eel, pike, perch, salmon, bream etc. Tours in winter and spring are especially in demand as anglers get the possibility of giving ice fishing a try. Angling guides often work in combination with boat rentals or cutter operators. Half of guiding services are offered in combination with accommodation services. Some angling guides in the case study area additionally offer the rental of equipment and guiding services for beginners. Interestingly, one guide also provides the possibility of finding company for anglers who do not have or do not travel with an angling buddy. Guiding services are offered in Lithuanian and Russian, most in English and some also in German.

Anglers in Lithuania are organised in **angling associations** and angling clubs that pursue the aim of promoting angling activities and supporting their development. Associations represent anglers' interests in a close dialogue with politics and cooperate with other national and

international associations. Furthermore, associations are highly engaged in the protection of fishing grounds, fish stock and nature. In this context, they teach anglers about their responsibilities towards the environment, but also on applicable laws and regulations of angling.

For going angling in Lithuania anglers need an **angling licence** to be allowed to catch in all public waters and national parks. Anglers can buy monthly or annual tickets online, via their smartphones, in bigger markets and angling shops.

When analysing the current state of coastal angling services in our Lithuanian case study area, differences within the country have become evident. Due to communities' different touristic approaches, the prevalence and positioning of coastal angling providers varies across regions despite their proximity. Noticeable differences between local providers have been revealed on sustainability issues and existing networks or cooperation. Providers in the region around Nida - despite their small number - start taking **sustainability** concepts seriously for their own businesses. Primarily environmental sustainability issues have been or are planned to be addressed by local providers. In contrast, the higher number of providers from Klaipeda and the surrounding area provide no information on sustainability considerations in their businesses. Similar observations are made with regard to existing **cooperation** with both angling and non-angling service providers. Whereas providers in the Nida region often cooperate with other providers to complete their offers, most providers in the Klaipeda region do not report of any cooperation. Providers from both regions, however, share the absence of special services for female, juvenile or handicapped anglers.

Regarding the **communication** channels of service providers in the Lithuanian case study area it became evident that providers pursue different online strategy. Independent of the provider category, only half of listed providers have an online presence in form of a website and even less promote their businesses and services on Facebook.

3.4 Coastal Angling Services in Poland

At the Polish Baltic coast and the **Szczecin Lagoon** area a smaller number of service providers is specialised on coastal angling tourism and can be classed in at least one of the seven provider categories. Almost one in five of the Polish providers can be assigned to two or even three of the categories for coastal angling service offers. The provider structure of the Polish case study area is headed by boat rentals, cutter operators, accommodations and to some extent also shops for

angling equipment (see Graphic 5). Within the categories, providers pursue different strategies with reference to networks, cooperation and offered services.

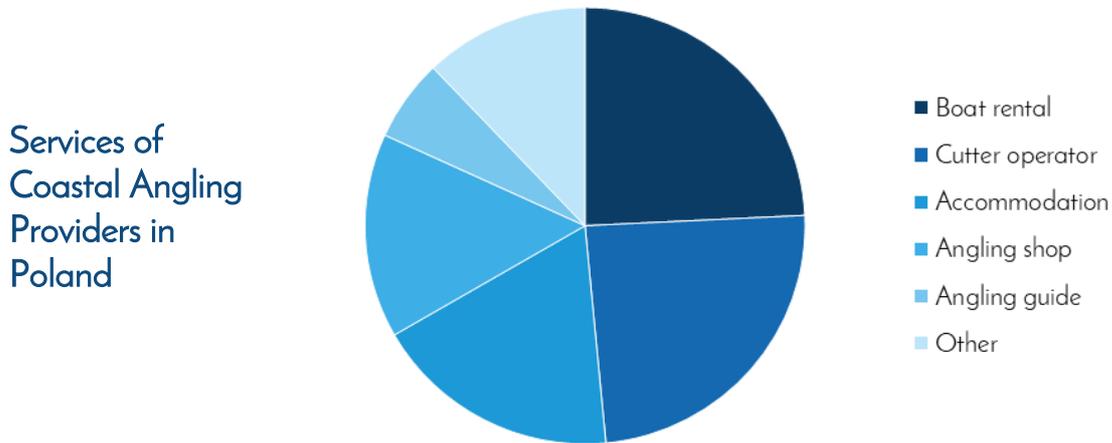


Figure 5: Service Distribution of Coastal Angling Providers in Poland

Existing **boat rentals** draw on a small number of available boats. Half of the listed providers are merely specialised on renting boats and do not offer supplementary services. The remaining providers expand their services by offering additional guiding services or angling tours on the Baltic Sea. Further supplementary offers include leisure activities such as sailing events, boat trips or kayak rentals. Services are offered in Polish, often in English and few also in German or Russian.

The same is true for the category of **cutter operators**. While most are specialised on offering angling tours, some also rent boats or accommodations to anglers. Offered angling tours are complemented by on-board catering services, angling assistance, insurance, rental of angling equipment, and the preparation and storage of fish. All providers declare to be specialised on cod. Apart from Polish, half of the services are offered in English and some also in German.

Two thirds of **accommodation** providers focus on the mere rental of cottages or rooms to anglers and visitors. The share in overnight stays of anglers varies between providers. While for some providers anglers represent only 10% of their bookings, others rely more heavily on anglers and their companions with 30-50% of overnight stays. These providers supply freezers or other services including rental of angling equipment or discounts on boat rentals. The other third of accommodation providers rent apartments as a supplementary offer to other services such as

boat rentals and cutter tours. Relevant features for anglers are not always available at all accommodations. Similar to the aforementioned provider categories, several accommodation providers speak - apart from Polish - English and German.

Angling shops in the Polish case study area provide anglers with angling gear and equipment throughout the whole year. Independent shops offer a diversified assortment including clothes, equipment, baits and more. Two shops also sell angling licenses and one shop offers lessons and exams for angling permits. Existing shops mainly focus on stationary sales, with one offering an additional online shop. Noticeably, all angling shops provide their services and information only in Polish. No information on further languages is provided.

The number of **angling guides** is rather limited in the case study area. Available guides offer tours on Baltic waters, but also on neighbouring rivers and in other European countries. Depending on anglers' wishes they can choose from a union of guides in which each guide is specialised on specific fish species and angling techniques, or from an independent guide who specialises in fly fishing and trolling. All angling guides offer their services in Polish and English.

Two local **angler associations** organise anglers in the case study area. Member numbers vary between 30 and 80. Further associations and clubs not solely focussing at marine fishing can be found in and beyond the case study area. The two main associations pursue the objective of promoting coastal and sea angling as well as creating favourable conditions for anglers. Furthermore, associations and clubs aim at protecting fish stock, the natural environment and natural resources.

Polish anglers have to take an exam for getting an **angling license** and for being allowed to go angling in national waters. Exams can be taken in clubs or shops, but licences are always given out by local authorities. Foreign anglers are not obliged to possess this licence. However, all anglers are required to carry an additional licence for sea waters or inland waters that is valid for up to twelve months and can be purchased online. Angling in national parks requires special permission. For tourist anglers, the license fee is often included in offers for angling tours.

Except for one, service providers can be found online via their own websites, but not even half of the listed providers use social media channels to further promote their services. Primarily used channels include Facebook but also Twitter or Google+. Access to provider information is limited for international visitors as only half of the listed service providers indicate to offer their services in English or other languages.

Drawing conclusions on the relevance of **sustainability** issues in the Polish case study area is rather difficult. No or only rare information on the environmental dimension of sustainability were made available. Few local initiatives have started taking actions on sustainability issues. Likewise, Polish service providers give neither any particulars on diversified offers for females or handicapped anglers, nor offers or events for juvenile anglers. Similar lack of information predominates in the search for **networks and cooperation** in the Polish case study area. Only few service providers have entered in networks of providers from different categories or branches. Providers rather expand their services by advertising diverse offers from more than one category as well as non-angling related supplementary services. Cooperation is yet not that common.

3.5 Summary of Coastal Angling in the South Baltic Region

Service providers' starting positions for promoting coastal angling tourism differ noticeably among the four **CATCH** partner countries Denmark, Germany, Lithuania and Poland. The detailed information of each country demonstrates the variance not only among countries but also among single service categories. Before addressing implications for the coastal angling tourism in the South Baltic Region that arise from this collective pool of information, differences but also commonalities among partner countries are discussed in the following.

Looking at the numbers and distribution of service providers among service categories it becomes evident that the focus of coastal angling services differs among project case study areas. Whereas in Lithuania and Denmark a higher absolute number of service providers exists, the numbers of providers in the German and Polish case study areas are rather small (see Graphic 6 for an estimated comparison among partner countries). Furthermore, the distribution of service categories varies widely among all four countries. In **Denmark**, more than 50% of the members of Fishing Zealand are accommodation providers. Besides a greater number of angling guides, the number of other providers including boat rentals, cutter operators and shops is comparably low. Providers in Fishing Zealand are also characterized by their strict focus on one service category and angling tourism only. Apart from renting accommodations to other guests as well, nearly no supplementary non-angling services are offered.

Distribution of Coastal Angling Providers

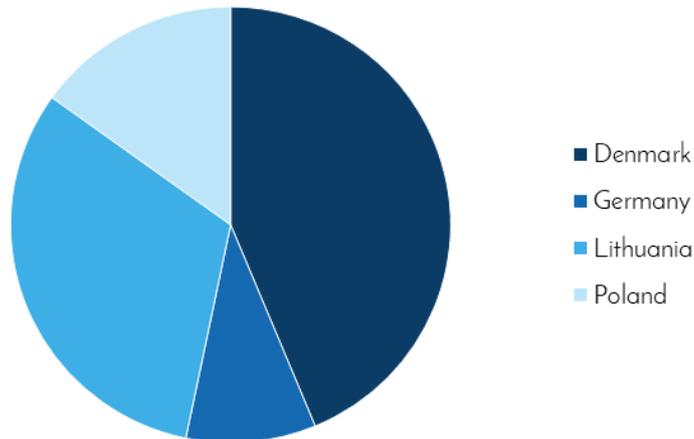


Figure 6: Distribution of Coastal Angling Providers in the CATCH partner countries

In the **German** case study area numbers of providers are likewise unequally distributed among angling service categories. Only that here boat rentals are most prominent. Two thirds of existing providers offer mixed services of two or more categories. This mainly includes boat rentals and guides, but also few accommodations and shops. Despite these mixed offers, the majority of providers focusses on offering angling-related services. Only few further offers are promoted. A likewise low number of supplementary offers exists among **Polish** service providers. Instead, providers concentrate on a single service category with a similar distribution of boat rentals, cutter operators, shops and accommodations. If specialised on more than one category, providers primarily offer a service combination of boat rentals, cutter operators, and sometimes accommodations. Angling guides and associations are not that common in this case study area. The **Lithuanian** case study area stands out in that about 50% of providers offer services of more than one category. Most common are service combinations of boat rentals, accommodations and angling guides. Angling shops and cutter operators, which make up the majority of Lithuanian angling services, mostly concentrate on their core businesses. Overall, every third service provider promotes supplementary offers that target non-angling guests.

Within **service categories**, the differences and commonalities between single countries become even more evident. In Poland and Lithuania, **boat rentals** account for 20-25% of all existing providers. In contrast, in the Danish case study area less than 10% of providers offer boats for rent, whereas in the German case study area the great majority of providers rents boats to anglers. Likewise, the category of **cutter operators** represents 20-35% of angling

providers in Germany, Lithuania and Poland, whereas only two Danish providers are included in this category. These two providers do not even specialise in angling tours but also rent boats to anglers and guests. In the category of **angling shops**, differences in the prevalence and relevance among partner countries are notable. In Denmark, Germany and Poland, only a small portion of service providers fall in this category, while in Lithuania about one third of providers sell angling equipment. As demonstrated earlier, **accommodation providers** are a main part of Fishing Zealand's membership. More than 50% of cooperating providers are specialised on accommodation services targeted at anglers. In contrast, in Poland, Lithuania and Germany only 20-30% of providers offer accommodations for rent, whereas many of these providers offer accommodation in addition to their core businesses and are often not well specialised on anglers' needs. Generally speaking, accommodation providers in Germany, Lithuania and Poland rarely offer special features for anglers beyond freezing facilities. As a side effect of the small provider number, the service category of coastal **angling guides** hardly exists in the Polish case study area. In Denmark, Germany and Lithuania more than a handful of service providers offer guiding services for anglers in their respective case study areas.

The relevance of angling associations and clubs as well as the distribution of angling licences differ in part greatly among the four CATCH partner countries. Differences in the number and activities of **angling associations** and clubs highlight their varying importance in each country. Anglers in the Danish and German case study area are widely organised in angling clubs that are themselves represented in one spanning angling association. In Lithuania and Poland, far less clubs represent a likewise smaller number of anglers. **License management** in the CATCH partner countries depends on national regulations and distribution networks. The type and number of required documents differ among countries and should be enquired about in a timely manner prior to angling trips and holidays. Denmark, Germany and Lithuania offer in addition to local issuing authorities the possibility to purchase angling licences and permits online.

Referring to **additional services** offered by angling service providers, anglers as well as their companions and other guests find a broad range of supplementary offers. Whereas in Denmark, Germany and Poland providers mainly concentrate on one or more of the presented categories, Lithuanian providers increasingly broaden their services to non-angling offers. These include boat or sightseeing tours as well as other leisure and sports activities or the organisation of events.

As the establishment of sustainable angling tourism is one major objective of CATCH, a closer look into **sustainability** issues in the four case study areas is inevitable. In Denmark, Fishing Zealand has an overarching sustainability concept in place, whereas in Germany, Lithuania and Poland - if even existing - providers follow their own strategies. Existing measures in the project area mainly involve the ecological dimension of sustainability. In all partner countries, actors engage in the preservation and sustainable development of the natural environment. This is mainly realised in cooperation with angling associations and clubs. Single providers take smaller steps including the use of solar energy or garbage separation. Events for children or juvenile anglers are part of the social dimension of sustainability. Fishing Zealand particularly encourages their partners to involve the youth in their activities. In the other partner countries, associations and clubs organise events for young anglers. Few to no special offers for female or handicapped anglers are promoted. The economical dimension of sustainability has not been directly mentioned by service providers, but as providers usually intend to stay in business they consider this dimension to some extent anyway.

Similar to sustainability issues, **networks and cooperation** have varying statuses among the CATCH partner countries. Again, Fishing Zealand holds a special position in the programme region as it already forms a wide network of associations, clubs, business partners and volunteers. Although not that widespread, some cooperation exists in Germany, Lithuania and Poland. The extent and organization of networks and cooperation, however, can vary greatly among regions and service providers. Whereas in the Klaipeda Region only few providers enter into cooperation, businesses in Nida support each other in their offers. Cooperation in Germany is rather clustered throughout the South Baltic coastline. Often this does not necessarily involve strong alliances. In wide parts of the German case study area, but especially in Poland collaborations between angling service providers are not that common.

Communication channels and web presences of service providers resemble among all nationalities and among service categories. With only very few exceptions, providers use their own websites to promote their services. These websites are, however, of varying up-to-dateness and quality. Barely half of listed providers utilise social media channels, including Facebook, YouTube, Google+ etc. Few providers use the additional possibility to promote their services through external channels such as touristic websites.

Strong discrepancies exist in the **languages** in which angling services are made available. Besides national languages, English is quite common and few providers speak a third or even fourth language. However, this cannot be guaranteed for all providers. Primary deficits have become evident in large parts of the Polish and German case study areas. Danish providers have the best knowledge of languages throughout the project area. Besides Danish and English, providers usually make their services available in German or another third language. German is noticeably widespread as also providers in Lithuania and Poland are sufficient in this language.

The differences and commonalities among providers, service categories and partner countries clearly demonstrate the different development stages of each case study area. It further highlights the importance of pointing out regional and transregional shortcomings as well as identifying best practice examples and learning from deficiencies and good standards. Explicit shortcomings and suggestions for improvement are outlined in the following chapter.

4 Successful exploitation of the potential of coastal angling tourism

Particulars of existing offers in the four CATCH partner countries Denmark, Germany, Lithuania and Poland not only demonstrate commonalities and differences, but also highlight varying development stages of sustainable coastal angling tourism in the South Baltic Region. The commonalities and differences among providers, communities and countries as well as the differing relevance of coastal angling tourism and recreational angling in general should not only be seen as challenges to overcome but rather as chances to learn and to foster regional development.

The current provider situation shows **potentials for development** and improvement of coastal angling tourism in the South Baltic Region. Knowing of the shortcomings of coastal regions and their service providers, good practices from other regions can serve as examples for necessary and potential adjustments. Single providers or entire communities can adapt feasible activities that fit in the global concept beneficially. The following **suggestions for improvements** or changes draw on the **shortcomings** that were identified on the basis of this report. Furthermore, **good practice** examples from within the project are highlighted and a link is established to the recently published CATCH Angler Survey Report. Benefits from implementing the suggestions developed are demonstrated for each point.

4.1 Shortcomings and Possibilities for Improvement

Specifications in the previous chapter clearly highlight the different development stages of coastal angling tourism and recreational angling among partner countries, and with that the special position Denmark holds within the project region. In Fishing Zealand, the relevance and impact of recreational angling is widely established, compared to the case study areas in Germany, Poland and Lithuania. Fishing Zealand puts great effort in fostering and strengthening recreational angling and angling tourism. This is realised by a strong cooperation with Denmark Sportfishing Association, business partners, clubs and volunteers. In the other partner countries, the same objective has been set; however, the progress is at varying levels. In Germany, the development of coastal angling tourism has progressed on a smaller scale than in

the Scandinavian regions. Associations, clubs and anglers make ongoing attempts in referring to the relevance of recreational angling and some touristic actors, including the Tourism Association of Mecklenburg-Western Pomerania (TMV), promote angling in the region. In Lithuania and Poland, effort on coastal angling is in its infancy. Though the potential and the relevance of coastal angling tourism have been recognised in both countries, only initial actions have been taken yet.

4.1.1 Findings on a Cross-Border Level

Despite the varying development stages, shortcomings not only at an individual or regional level but also on a cross-border level have become evident in this study's findings. Most prominent shortcomings at a cross-border level involve **language barriers**, lack of relevance of **sustainability** issues, few or non-existence of **networks and cooperation**, as well as limited **online visibility** of providers and offers. These general shortcomings are outlined separately in the following paragraphs.

Being able to communicate with anglers, tourists and other guests is a basic requirement for a successful business. Doing so solely in national **languages** impedes attracting international guests and promoting individual offers across national borders. Except in most parts of the Danish case study area and in some parts of Lithuania, good language skills are a great challenge for the development of coastal angling tourism in the South Baltic Region. Especially in Poland and among numerous German service providers language deficits are prominent. To attract international guests, language barriers must be reduced. Improving English skills is one possibility for cross-border communication, both offline and online. However, not all anglers and guests speak English. To find the right solution for providers and communities, a target group analysis can provide insights into which language skills are required and should be strengthened. In that respect, personnel can and should be trained by taking language courses or at least learn the most important words and phrases for a sufficient communication with their guests. Furthermore, when recruiting new personnel providers can pay attention to language skills. In addition to personnel requirements, offers as well as information material should be provided in multi-lingual versions and online presences be translated. However, these measures may take a

while to be effectively in place. In this respect, providers may use the chance to take up on cooperation with neighbouring providers and benefit from each other's skills and knowledge.

An important but unfortunate shortcoming is the lack of already implemented **sustainability** measures. An overarching sustainability objective and concept for coastal angling tourism only exists in the Danish case study area. In Germany, only a limited number of providers have sustainability measures in place, whereas the majority does not provide any further information on their sustainability efforts. In Lithuania a similar unsatisfactory situation is found. Efforts differ partly among regions and are rather rudimentary. In Poland, sustainability measures exist likewise scarcely. Merely the sustainability efforts of regional and national associations are common and laudable among all four countries.

Sustainability is internationally acknowledged as significant but the implementation of sustainability measures varies greatly across countries and fields of activity. In coastal angling tourism as well, the importance of sustainability has been recognized and actors must be encouraged to implement necessary measures. But not only single service providers or actors but the overall community or region has to commit itself to complying with defined standards. In this context it must be pointed out that sustainability includes different dimensions which have to be addressed as a whole rather than from a one-sided perspective. The dimensions involve environmental, economic and social issues of sustainability as well as the management which implements and monitors sustainability standards and measures. As sustainability is an important and complex subject for providers and coastal communities, within the scope of CATCH a list of indicators has been developed to help stakeholders complying with necessary rules and standards. In national and cross-border workshops stakeholder groups of coastal angling tourism developed and discussed indicators in all of the before mentioned dimensions adjusted to the requirements of coastal angling tourism. The agreed guidelines are clear and easy to understand and can be applied on a local as well as regional level.

Adhering to sustainability standards and given guidelines is especially important in coastal angling tourism. On the **environmental dimension**, a cautious treatment of nature and its resources is in the centre of attention. This includes, for example, a reduction of the pollution of the environment, the use of renewable energies and resources as well as the protection of fish stocks and angling spots. Providers, anglers, guests and communities are encouraged to minimize negative environmental consequences and reduce their ecological footprint. The

economic dimension of sustainability involves the long-term securing of providers' existence as well as maintaining and improving competitive advantages of providers and communities. This can be achieved with various measures, including for example the diversification of offers, knowing the target group or cooperating with other small or big businesses. The **social dimension** introduces the responsibility of each single provider or stakeholder of coastal angling tourism towards its own environment. This involves including all stakeholders in activities and decision makings. In order to meet stakeholders' needs and avoid disagreements, developments of a region should always consider the perspectives of all affected stakeholders. Going hand in hand with the nature, economic considerations and the social environment is inevitable in achieving successful sustainable coastal angling tourism. Despite addressing each perspective separately, sustainability dimensions must be taken into account simultaneously in order to work effectively.

A third and major shortcoming involves the lack of existing **networks and cooperation** between service providers in the CATCH case study areas. As in the two previous sections, Fishing Zealand stands out from the other partner countries. In the Danish case study area, service providers from different service categories act in cooperation with Fishing Zealand. Each provider operates independently, but with shared standards, guidelines and objectives. They benefit from a collective promotion of offers, possibilities of mutual recommendation or even being offered as a package. Benefits for providers resulting from this network include, for example, a broader offer, improved attractiveness, division of tasks and help. Providers also benefit from a common exchange, collaborative learning and improving, as well as from being able to address a bigger target group. Advantages for anglers and guests are likewise broad. Anglers can find suitable offers at one go and do not have to search long for interesting holiday offers. At the same time, guests can rely on a trusting and reliable cooperation, so that in case of failures a replacement is found fast.

By comparison, in Germany, Lithuania and Poland only a minor number of service providers have specified cooperating with other - angling or non-angling - businesses and providers. Coastal angling service providers can be divided in two groups: They either concentrate solely on their core businesses or they themselves offer diverse services for anglers and guests. The latter group, however, exists to a small extent only. Contrary to this current trend of minimal cooperation, networks among providers and regions are imperative, effective and beneficial. This applies to all regions and coastal communities, both small or big, developed or

less developed. Regions with a higher number of angling service providers can benefit from providers working together instead of competing with each other. Cooperation strengthens offers from the provider side and with that creates competitive advantages for cooperating providers. Shortcomings of one provider can be balanced by the strengths of others. Also, highlighting individual strengths can help networks to differentiate themselves from other providers. This includes positioning themselves favourably against providers from other tourism or leisure sectors and attracting both advanced and newly interested anglers and guests. For communities with fewer providers scattered across the region, networks and collaboration among providers can be the key to success and long-term existence. Smaller providers can partner up and benefit from this newly found scope. Networks of angling service providers broaden their visibility as well as accessibility. In turn, anglers and guests profit from an improved infrastructure for their trips, vacations and their overall experience. This also increases the attractiveness of the providers and the region as a whole. Potential originates from a grown number of guests and with that increased profits for all providers in the network. Another advantage lies in providers approaching new projects that a single business could not realize alone. Resources can be shared and greater objectives achieved that in turn foster service offers and the development of the region. Also, as the region might not offer services in close proximity, having an established network facilitates recommending partner businesses and helps anglers and guests with their search for further holiday offers.

In conclusion, coastal communities and angling service providers, especially in the German, Lithuanian and Polish case study area, would greatly benefit from strengthening bonds and partnerships between service providers but also other stakeholder groups. Cooperation helps fostering the communities and the regions as an attractive destination for anglers and other guests. It is also beneficial for representing and implementing common interests, as well as supporting each other when realizing new ideas. Individual strengths can be used for the benefit of all and shortcomings, for example due to limited resources, can be compensated by partner businesses. Reliable networks and cooperation can therefore result in mutual benefits for more and less developed providers and regions. For the Danish case study area it is therefore even more important to uphold and strengthen its existing network in order to maintain its competitive advantage. It could also be extended by involving more providers from the yet underrepresented categories of Fishing Zealand.

A fourth significant shortcoming lies in service providers' **web presence and online visibility** of their businesses and offers. Although the majority of providers uses their own websites, visibility is not necessarily guaranteed. It has been often noticed that website contexts are not updated. Visitors of a website are therefore uncertain whether the provider is still in business. The layout and design are often outdated and unappealing for the visitor's eye. An unstructured presentation of information decreases the website's attractiveness and also complicates the search for relevant information by interested guests. Furthermore, only few providers use the chance of the free promotion and increase of visibility of their services via social media channels. The share of providers presented on Facebook or similar channels is low although the presence on social media can increase the visibility and with that the accessibility of providers and services. Anglers increasingly use the possibility of searching for information for trips and holidays online. Not only websites or searching via search engines are common, but also via social, often unknown, contacts. People exchange experiences and information on angling spots, services or destinations in general via groups and forums on the Internet. They can find relevant information on what to do where, on fish species and angling techniques or which provider offers trips and tours. It is therefore applicable for not only individual providers but for communities in general to promote located service providers and the region as a whole.

Visibility is key! Attention should be paid to three key aspects that are applicable to both websites and social media accounts. The first is keeping information up to date. Service providers need to have someone in charge who updates information on all channels, deletes outdated data and ensures an appealing web presence. Second, as highlighted earlier language is an important factor when attracting old and new guests. Thus, information on websites and social media channels need to be made available in different languages in accordance to the target group. Besides national languages information should at least be presented in English, if possible also in languages spoken by the majority of the target group. Third, the layout of websites is vital to attract not only "hardcore" anglers but also new guests who might be interested in going on their first angling trip or holiday. In that, information and, for example, trip details have to be presented in a structured and appealing order. Disorganized or old-fashioned websites can prevent visitors from staying on the website and sadly increase fluctuation. The same is true for social media presences. Facebook pages or similar need to be updated, news regularly posted

and providers need to react to inquiries by interested partners within decent time. To broaden visibility, providers can also post news and offers on other pages or angling groups.

4.1.2 Findings on National Levels

Besides these four major shortcomings on a cross-border level, further shortcomings on national levels were identified. The following points should, however, be considered carefully as it is risky to make recommendations on the basis of provider numbers or the distribution of providers in each case study area. Further information on regulations and environmental as well as economic conditions need to be included in sustainable considerations. Nevertheless, some suggestions based on the findings of this survey can be made and their benefits highlighted.

In the **Danish** case study area, the provider situation is found best in the whole project area. By keeping up a transregional network of providers, communities, clubs and volunteers, Fishing Zealand leads as a role model for other coastal regions. Getting to this position required hard work from all involved parties. Now it is necessary to hold this position, strengthen existing partnerships and extend its range to more interested providers and communities. Sustainability measures need to be kept up and serve as a best practice example for other regions and communities. Noticeable for the Danish case study area is the comparatively small number of angling shops, boat rentals and cutter operators. Many competitive providers are located in the Copenhagen area but it might be a good idea to start negotiations with them or think about for example offering angling tours with boats by partner business of Fishing Zealand. Furthermore, surveyed service providers of Fishing Zealand did not indicate any supplementary services to their core angling business. In the event of difficulties this might be an additional consideration for service providers to use their businesses at capacity.

Coastal angling tourism at the **German** Baltic coast is characterized by agglomerations of angling providers in touristic centres of Mecklenburg-Western Pomerania whereas smaller, less crowded regions are disregarded. It is therefore necessary to support smaller and less developed communities that can provide anglers with more peaceful and elemental surroundings for angling trips and holidays. As mentioned before, sustainability strategies have to be established, language skills extended and networks among service providers and other stakeholder groups established. To make the latter possible, existing and new cooperation have to be built in that

not only links are shared but attractive common offers created. These offers can help anglers and visitors by simplifying their search efforts for the right offers and supplementary services. Furthermore, the cooperation among service providers enables businesses and communities to tackle new challenges and projects that fosters the development of the region. Especially smaller communities off the touristic centers can benefit from them.

In **Lithuania** considerable regional differences were found. In order to ensure all stakeholders benefitting from coastal angling tourism at the Lithuanian Baltic coast area, providers with development potential can learn from those more successful businesses. In particular, strategies for long-term collaboration and networks as well as sustainability issues can be adapted or shared. This could be achieved not only on local but transregional levels. Similar approaches as in the German case study area can be applied to Lithuania. In this regard also the cooperation with associations and angling clubs could be improved. Moreover, numerous Lithuanian providers are characterized by offering various supplementary services. This can be, on the one hand, beneficiary to increase attractiveness and using their full capacities even in time of less angling visitors. However, providers need to be cautious of not neglecting their core businesses and not being overlooked in anglers' searches for angling providers as they might create a feeling of low specialization or knowledge on angling related subjects.

The service landscape of coastal angling tourism in the **Polish** case study area is marked by a comparable low number of specialised service providers. It is therefore not only necessary to raise the number of available services or consider supplementary services for weaker periods but also to bring already existing providers together and provide them with a platform for joint exchange and development. Providers are encouraged to build networks and use common strengths to help one another and increase the attractiveness of the region. As in Poland coastal angling tourism is in its beginnings, providers and communities can use this opportunity to consider sustainability issues right from the beginning. In order to use the development potential of the region and achieve a higher utilization of capacities the interaction of all stakeholders of coastal angling tourism is inevitable. Furthermore, angler's needs in general have to be more widely represented and angling clubs and organisations strengthened. Overall, Poland can also benefit from those suggestions given to Denmark, Germany and Lithuania.

4.2 Learning from within the Project Area of CATCH

To overcome shortcomings and implement new standards, strategies and actions can be a challenge for service providers and coastal communities. In order to facilitate these processes, it can be of great help to look for exemplary providers or networks and adopt those aspects suitable for one's own business or community. In the CATCH partner countries, providers do not have to search that far but can use **role models** situated in the project area. Role model effects originate especially from two of the four countries. In Denmark, Fishing Zealand leads by example as a whole region and network. In Germany, the service provider Halbinsel Peenemünde and the Tourism Association of Mecklenburg-Western Pomerania are leading examples. In Lithuania and Poland, merely initial efforts have been taken and service providers and coastal communities can profit from the experiences of others. Especially sustainability issues need to be addressed in many areas.

Referring to the individual descriptions of each case study area and the summarising findings of the previous chapter, it becomes apparent that the Danish case study area as a whole can and should serve as a best practice for the other case study areas. **Fishing Zealand** shows the importance of building and strengthening regional networks with diverse stakeholder body groups. Networks and cooperation are not locally limited but spread trans-regionally across several communities. With the cooperation of providers from different categories including boat rentals, shops, guides, accommodation as well as the Danish Sportsfishing Association and local angling clubs, angler needs can be satisfied, sustainability and development goals be reached and also changing conditions be defied. Fishing Zealand uses its website as well as social media channels to promote partner businesses and provides anglers with all necessary information for angling trips and upcoming events or competitions. Fishing Zealand also distinguishes itself in its ongoing efforts of improving quality and education standards, environmental conditions and the involvement of anglers of all ages. Sustainability is not only considered with regards to service providers, but a holistic concept for the whole area of Fishing Zealand has been developed. Attention lies on the protection of the nature, protection of fish stock, renaturation etc., and with that the facilitation of sustainable recreational angling. Fishing Zealand is an exemplary holistic model that involves the coastal angling tourism but also local anglers, communities and the nature in its concept. With its ongoing improvements, Fishing

Zealand is a great pioneer for successful and sustainable coastal angling tourism for other regions in Denmark, the South Baltic Region, Europe and the world.

Though Fishing Zealand convinces with its trans-regional concept and network, single providers or smaller networks can also serve as great examples for less developed regions. **Halbinsel Peenemünde** is a newly developed angling camp which has been gradually developed and aims for providing anglers and other guests with everything they need and more. Halbinsel Peenemünde offers as a single provider a wide range of services. These include different types of accommodation, boats for individual tours and guided angling tours. Of interest for anglers are the nearby slipway and the facilities to clean and prepare the fish after a successful angling trip. Halbinsel Peenemünde attracts not only anglers, but also families, singles, couples and groups. Besides angling features they offer a small shop with regional products and antiques, a museum, a restaurant ship, educational talks, barbecues, pony ridings, bike rentals, flea markets and more. The premises of Halbinsel Peenemünde are also the venue for cultural festivities or angling camps for children and adolescents. Due to its openness and connection to the region, it has also turned into a popular meeting point for locals.

Halbinsel Peenemünde is constantly growing and new service areas added to its profile. Its overall organisation, the availability of all relevant features and great angling grounds have established Halbinsel Peenemünde as a popular and attractive destination for anglers and guests that look for recreation, tranquillity and relaxation. Besides the angling camp's offers, services and recreational activities from other providers in the area of Peenemünde and Usedom are promoted. Sustainability issues are addressed in a variety of ways. Halbinsel Peenemünde aims for a careful treatment of the nature and its resources. They provide products from regional suppliers and promote further non-angling offers in the region. Its business is designed for a long-term existence and the offered services are broadly diversified but with a common strategy. Furthermore, Halbinsel Peenemünde does not only aim to attract tourists from other areas, but also includes locals in their efforts. Halbinsel Peenemünde therefore sets an example how single providers - and their potential partners - successfully promote angling tourism and have a positive effect on the overall region. Depending on local and geographical conditions as well as the existence of further coastal angling service providers in the area, providers and coastal communities can favour their concepts and adopt those features suitable for their development.

Besides concepts for single providers and regional networks it is worth looking into provider-independent associations. As an example, the **Tourism Association of Mecklenburg-Western Pomerania (TMV)** aims for the positive development of tourism and recreational activities in Mecklenburg Western Pomerania. This does not involve increasing tourist numbers at any cost but rather improving the quality of offered services and ensuring sustainable tourism. The TMV is also concerned with the development of sustainable angling tourism. In this context, the TMV developed a criteria catalogue for certifying angling accommodations and angling tourist offices. Providers fulfilling all criteria receive a certificate "Angelurlaub MV - Geprüfte Qualität" (Angling Holidays Mecklenburg-Western Pomerania - Certified Quality). This ensures quality of listed providers and serves as a useful guidance for anglers and guests. Similar certificates are given to service providers that are partners of **Fishing Zealand**. Having certificates in place is a great help for anglers to orientate in the vast number of providers listed online and to find those that are qualified for anglers' needs.

4.3 Learning from the CATCH Angler Survey

Besides analysing the current situation of coastal angling service providers, the CATCH project surveyed experiences, expectations and requirements of anglers from Denmark, Germany, Lithuania and Poland. These insights are used to identify further potential ways of improvement that could not be established by mere numbers or a list of existing features. In the following, requirements determined in the **CATCH Angler Survey** are compared with the previously specified characteristics of coastal angling service providers in the South Baltic Region. This concerns in particular accommodation services, angling shops and services of angling guides.

The angler survey revealed that anglers, independent of their nationalities, tend to stay in cottages or apartments, at camping sites or shelters. B&Bs or hotels are less frequented by anglers. Their main criteria for choosing an **accommodation** are its location and proximity to an angling spot, space for a boat or their equipment, but also the price for the overnight stay. The findings of the provider survey show that though providers solicit for anglers, their accommodations are usually not adapted to anglers' needs. Providers often promote a fit merely to attract a broader target group. Despite their proximity to the coast, several improvements need to be made. Anglers do not expect big luxury but very specific features. This includes the

space for drying clothes and store equipment and the possibility to clean, prepare and freeze fish if not otherwise possible. In case meals are included, adjusted breakfast times and preferably a packed lunch can delight anglers. Accommodation providers should also supply anglers with additional information concerning behavioural guidelines for angling spots, information on supplementary offers – both angling and non-angling related – and information on relevant contact persons. Overall, only accommodation providers that guarantee relevant features should be able to call themselves angler accommodation.

The utilisation of guiding services was also queried in the angler survey. It was found that only a small percentage of participants hire an **angling guide** for their angling trips. Primary reasons for not hiring professional guides included monetary issues as well as the possibility of finding relevant information on the angling spot or fish species online. Even more often anglers stated to be too experienced to make use of the services of an angling guide. To increase attractiveness of guiding services for both unexperienced and advanced anglers, angling guides may need to reposition their promotion strategies. Knowledge of specific angling grounds, techniques, species etc. have to be highlighted and language skills improved. In addition to the general guiding services supplementary offers can be promoted, including for example preparation of fish or cooking classes, educational offers, unique techniques or further trips in the surroundings. Alliances with other service providers can also be the right step to reach more potential customers. At this stage, cooperation with boot rentals, accommodation providers and even angling shops have turned out well.

When asked where anglers usually buy their angling equipment, the majority of participants answered buying it in their local **angling shops**. However, they also indicated to purchase their equipment in online stores ever more frequently. Reasons involve a greater assortment, the independence of business hours, but also a certain level of convenience. Especially in the Danish case study area the shift from offline to online purchases is evident. Many anglers prefer buying their equipment in online shops. In Fishing Zealand therefore only few stationary angling shops exist. Bigger shops are rather found in urban regions, here mainly in the Copenhagen area. As a consequence, stationary shops need to improve their attractiveness for anglers. This can be done by an increased promotion of offers and services, as well as implementing an additional online shop if possible. An alternative can involve offering

catalogues and further order options for anglers to minimize the benefits of purchasing online. Highlighting the importance and especially the quality of sales advises can be of great benefit for both anglers and providers. Besides promoting equipment, sales conversations support establishing a bond between providers and anglers. Experienced anglers will appreciate the opinions of the shop providers, but most of all new customers as well as less experienced or occasional anglers value the expertise of shop employees when searching for the right equipment. The high load of information on the Internet can unsettle potential customers who can then be attracted by high quality advice and great offers in the stationary angling shops.

As is already done by few providers in the case study areas, angling shops can organize angling events that not only delight existing customers but also increase the shop's visibility and attractiveness for potential customers. Furthermore, preparation courses and exams for angling licenses can be realized at the premises of angling shops. In some cases broadening the range of service might therefore be inevitable. It is conceivable to offer services from other service categories of coastal angling tourism. Providers may decide to offer more services by themselves or to cooperate with other service providers. They could, for example, offer angling tours with an option of renting equipment or an option to buy prior to the tour or afterwards. Shops could also offer guided tours or team up with qualified angling guides. Anglers can then receive all relevant information and equipment from one place.

The numerous ways of improvement outlined in this chapter demonstrate the immense potential for coastal angling tourism from a provider perspective. Suggestions should be considered carefully and the state of each provider compared with a realistic optimum state. Wherever possible, adjustments should be made on individual, network as well as community levels.

Providers in the South Baltic Region are in the comfortable position of being able to learn and profit from existing best practices that developed from a similar stage. The identified shortcomings and benefits that arise from changes in network development, sustainability issues, optimization of service offers etc. can help in this development and improvement process to foster coastal angling tourism in general. The combination of providers as well as the demand perspective provides an extensive overview of what exists and what is needed for a successful long-term business strategy of providers in the South Baltic Region.

5 Conclusions

On the basis of the [CATCH Provider Survey Report](#) the current state of the service situation of coastal angling tourism in the South Baltic Region has become evident. It can be concluded that project areas in part differ greatly in its development states, not only with reference to existing providers or infrastructure but also the importance that is attributed to coastal angling tourism in the respective regions.

It is not enough to solely compare provider numbers or available services. The service landscapes in the four project areas of CATCH need to be considered in their uniqueness and their regional economic and ecological conditions. It is therefore likewise important to not impose successful strategies of one region to another. Potentials of the region as a coastal angling destination and of service providers need to be analysed and growth strategies developed accordingly. Findings and suggestions from this report can be used as a guidance to develop these strategies. However, they have to be considered carefully and adapted to regional conditions and objectives. This report raises no claim for completeness and only refers to opportunities of improvement grounded in the analysis of participating service providers. It is advisable to consider the implications given in this report carefully as the underlying problems appear to be no isolated cases. The most significant shortcomings found in this analysis involve missing networks among service providers, missing sustainability measures and strategies, deficient web presences and visibility, and language barriers between providers and international guests. These four issues were found to be critical for a successful development of coastal angling tourism.

Three of these shortcomings are addressed within the CATCH project and measures are developed for angling service providers. First, creating and strengthening networks is realised by [regional and cross-border workshops](#) in the project areas. Representatives from all stakeholder groups are invited to discuss common concerns and development chances of coastal angling tourism. Furthermore, stakeholders including service providers are encouraged to build networks and cooperate for a successful future. Second, within CATCH [sustainability indicators](#) for coastal angling tourism were developed as guidelines for service providers and coastal communities. These indicators were discussed in the stakeholder workshops and adapted to requirements of sustainable angling. And third, visibility of service providers can be increased by being promoted



on the upcoming **information platform** of **CATCH**. This platform offers service providers the possibility to present their services to national and international anglers and visitors. Information will be provided in five languages (English, Danish, German, Lithuanian and Polish) and service providers can benefit from a higher visibility. For more information see fishingsouthbaltic.eu.

But also the suggestions for improvement on national as well as provider levels can support the development of coastal angling tourism in the South Baltic Region. Therefore - as already mentioned before - potential shortcomings have to be evaluated on each level carefully and measures taken if necessary. These challenges can be overcome with the help of the **CATCH Provider Survey Report** in combination with the **CATCH Angler Survey Report**. Both reports form the basis for a successful development of sustainable coastal angling tourism in the South Baltic Region and the exploitation of its great potential for coastal communities.

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