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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

Lead Partner:



Project Partners:





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 keep being pushed forward (Hyder et al., 2017; Recreational Fisheries and Aquatic Environment Forum, 2018).

Recreational angling in the Baltic Sea Region amounts to 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 merely a niche market of which the potential is yet unexploited, and only little is known about both the demand and the 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 on and expectations of coastal tourism and to transform upcoming challenges into benefits. Visitors' growing interest in **sustainable tourism and authentic experiences**, the increasing acceptance of **acting in an environmentally conscious manner** as well as the possibility of experiencing services and destinations **throughout the 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 to identify these strengths and chances of coastal angling tourism.

To foster its development, the EU-project **CATCH** aims to promote coastal angling tourism across borders by providing coastal communities with tools to establish sustainable angling tourism, defining inspiring **best practices**, fostering **exchange and cooperation between stakeholders** via national and cross-border workshops, as well as 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 carried out to illustrate the current state of coastal angling tourism in the South Baltic Region.

Within CATCH, information was 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 of 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 research and direct contact with local providers. The research was targeted to collect 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 focused, 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 generalisable 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 Figure 1).



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

Each case study area is characterised by its unique environmental features and different infrastructure or development of coastal angling tourism. In the following, a short description of each case study area is provided. For more information, factsheets on 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 pike. 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 economic value of coastal angling. Besides offering great conditions for anglers, Fishing Zealand and the Pike Factory focus on education of and information for anglers about sustainable angling.

Germany: **Peenemünde** and its surrounding area present 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 emphasise the broad positioning of Peenemünde.

Lithuania: The **Klaipėda** region, 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, offers 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 of catching 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 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 licence 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 in the categories of boat rentals, cutter operators, angling shops, accommodation and angling guides, including a description of the services offered, contact and communication channels, as well as languages spoken by the provider and employees. Of particular interest was information on offers specifically targeted to anglers, female anglers, juvenile anglers and/or disabled 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 of angling associations and licence management were considered separately from the other categories as they act at 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, sometimes greatly, among Denmark, Germany, Lithuania and Poland. The CATCH market analysis reveals insights into available offers and the infrastructure of each country, which allows for 1) a separated and 2) a comparative analysis of existing offers. Results of the market analysis are therefore first presented at national levels and subsequently at a summarised level. National results are equally structured by starting with information on boat rentals followed by cutter operators, accommodation, angling shops, angling guides, associations and angling licence 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 for coastal angling tourism. Angling in general is a common recreational and sporting activity undertaken by anglers of 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 organisation 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 values, standards and quality requirements to ensure 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. Figure 2 shows the percentage distribution of coastal angling service providers in the Danish case study area.

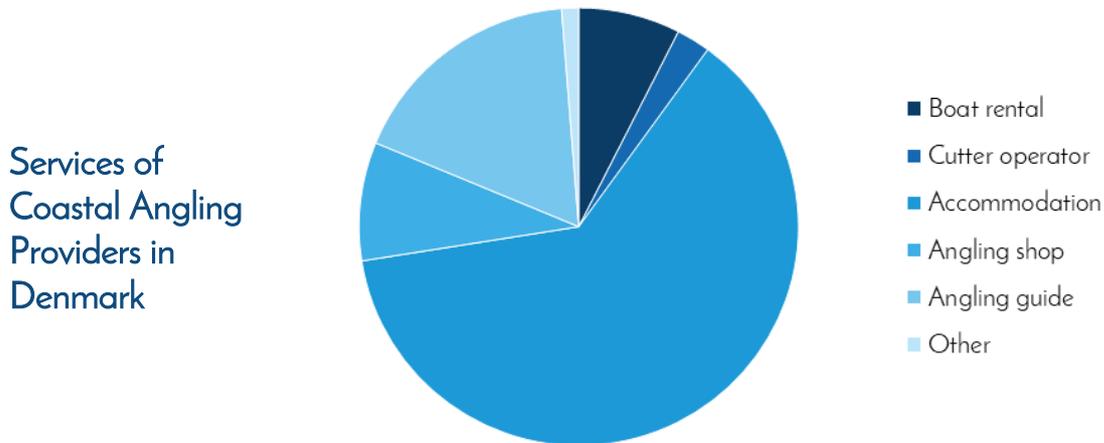


Figure 2: Service Distribution of Coastal Angling Providers in Denmark

Boat rentals offer 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 accommodation. All accommodation is characterised by its closeness to angling spots and the coast. Accommodation is well resourced with features especially for anglers, including facilities for cleaning and storing fish, spaces for boats as well as flexible check-in and check-out times. These providers also offer information on sustainable angling and, if anglers are 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 specialise in selling angling gear and equipment to local anglers and tourists. Services are offered all year round and are available in Danish and English, and in one shop 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 could be a result of competitive providers in contiguous areas and anglers' preference for 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 specialises in certain angling techniques, but principally in fly fishing, spin fishing and trolling. Guides reveal to anglers the best spots and ways to catch sea trout, pike and other fish species. Angling guides do not only offer guided tours and courses for all ages and skill levels, but are also involved in the education of anglers and cooperation in environmental projects. Besides angling, additional offers include sporting activities in nature, such as mountain biking or kayaking. Angling guides offer their services in Danish and English, and most also in German.

Fishing Zealand cooperates with Denmark's largest organisation for sport fishing, the Denmark Sport Fishing Association. This **angling association** represents its members on environmental and political issues, highlights the importance of restoring and maintaining the natural environment, and creates new partnerships. Its objective involves securing the future of angling by emphasising environmental sustainability. Besides this national association, Fishing Zealand cooperates with several local angling clubs. Clubs and volunteers take on intensive work to improve the conditions for angling and ensure its future existence. Their work includes restoration of rivers, efforts in breeding and stocking of fish, as well as spreading knowledge among young people and other interested parties.

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

Danish providers target diverse offers for all anglers. In cooperation with local fishing clubs, Fishing Zealand or other fishing experts, providers co-organise various activities and events on different occasions. Especially **juvenile anglers** are targeted by many events. Offers for disabled 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 a few have their own Facebook page. Partners of Fishing Zealand

are additionally listed on the Fishing Zealand website. Only one provider stated it was 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. One provider in particular has been growing its business steadily since its establishment and now offers accommodation, 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 only 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 tourist centres of Mecklenburg-Western Pomerania. For comparison, the following paragraphs focus on service providers in the area of **Peenemünde**. As shown in Figure 3, service provider categories are unequally distributed, which might refer to the limited geographical reach.

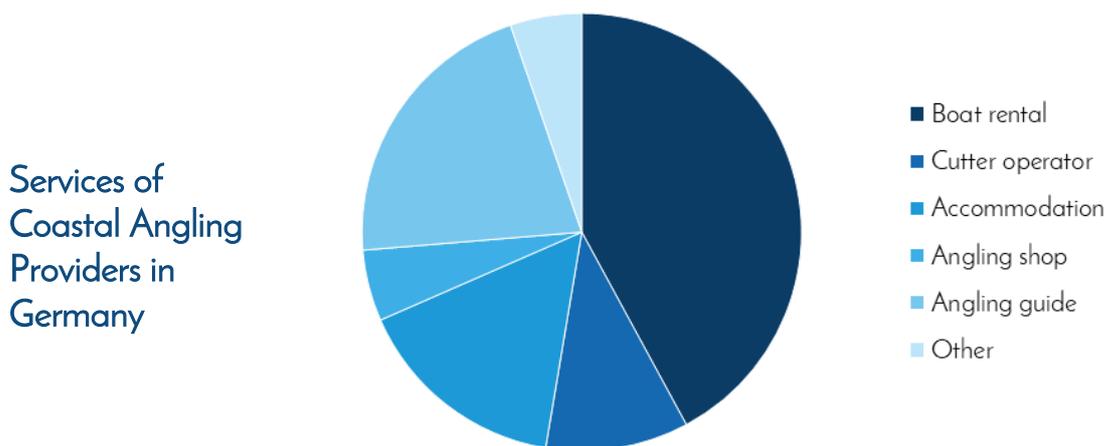


Figure 3: Service Distribution of Coastal Angling Providers in Germany

Boat rentals are the most represented category in the German case study area. Dependent on the size of the business, boat rental providers 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, although some are flexible to the 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 accommodation 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 not often found in the German case study area. Existing tours are offered for up to six persons and target 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. Accommodation is often added to other services such as boat rentals. Providers speak German and sometimes 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 for groups. Depending on personal preferences, anglers may choose between, for example, tours on trolling or spin fishing and tours for catching pike, perch, sander, cod, garfish and so on. Services are mainly offered in German, and a 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 a few angling clubs.

Information on **sustainability** issues is only rarely available for German angling service providers. If they exist, measures concentrate mainly on the environmental dimension of sustainability, including recycling or conservation of energy and other resources. Offers for female or disabled 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 characterised by being mainly listed by single providers. **Cooperation** between service providers sometimes exists, but is 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 focused 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 Figure 4).

Services of Coastal Angling Providers in Lithuania

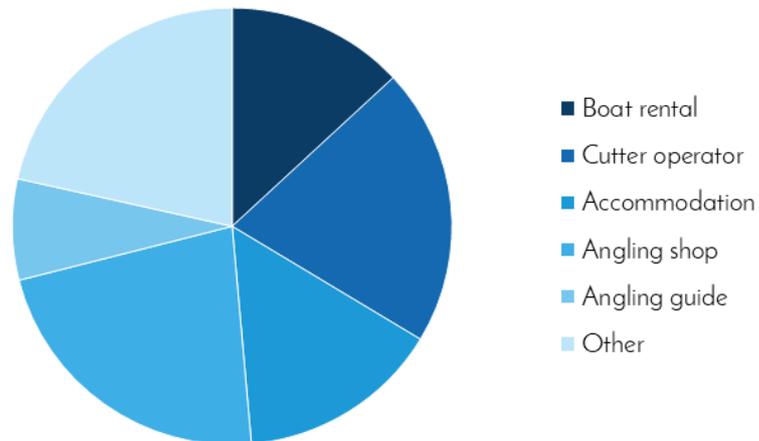


Figure 4: Service Distribution of Coastal Angling Providers in Lithuania

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 from 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, as well as 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 a 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 offered 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 a few that offer additional guiding services or boat rentals. For full utilisation of their vessels, cutter operators often provide 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 in German or Polish too.

Accommodation providers in the Lithuanian case study area pursue different strategies. Existing providers need to be distinguished in two groups, one that depends heavily 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 in 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, who 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 and so on. Further offers for anglers include the organisation of angling trips, guided tours and excursions, as well as transportation to angling spots. For the non-angling companions, 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 carry supplies for hunting, boats or boat accessories. One organises angling trips and boat tours as well as rental 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 in catching different fish species, including cod, smelt, eel, pike, perch, salmon, bream and so on. 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 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 stocks and nature. In this context, they teach anglers about their responsibilities towards the environment, but also applicable laws and regulations for angling.

To go 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 in 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 vary 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 - are starting to take **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 any cooperation. Providers from both regions, however, share the absence of special services for female, juvenile or disabled anglers.

Regarding the **communication** channels of service providers in the Lithuanian case study area, it became evident that providers pursue different online strategies. Independent of the provider category, only half of listed providers have an online presence in the form of a website and even fewer 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 specialise in 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, accommodation and to some extent also shops for

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

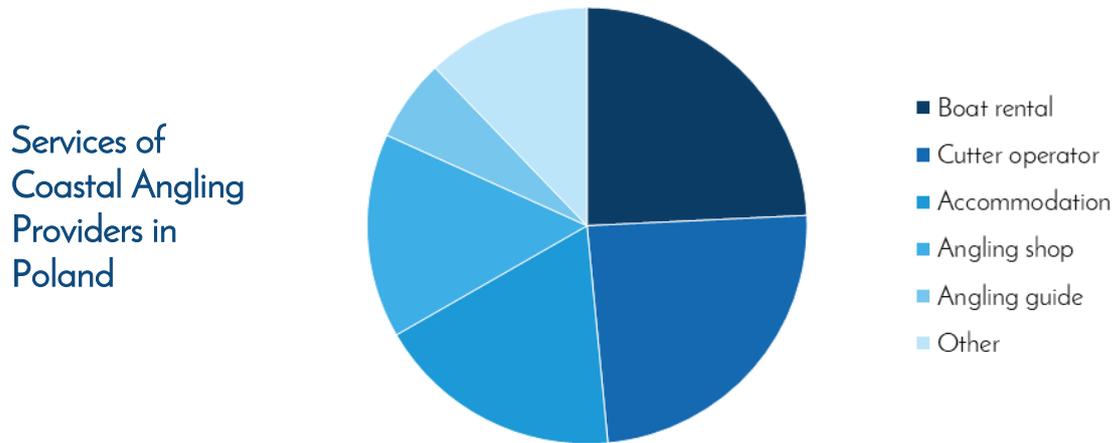


Figure 5: Service Distribution of Coastal Angling Providers in Poland

Existing **boat rentals** draw on a small number of available boats. Half of the listed providers merely specialise in 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 a few also in German or Russian.

The same is true for the category of **cutter operators**. While most specialise in offering angling tours, some also rent boats or accommodation to anglers. The angling tours available are complemented by on-board catering services, angling assistance, insurance, rental of angling equipment, and the preparation and storage of fish. All providers declare themselves to specialise in 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 accommodation. 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 year. Independent shops offer a diverse assortment, including clothes, equipment, bait and more. Two shops also sell angling licences and one shop offers lessons and exams for angling permits. Existing shops mainly focus on physical sales, with one having an additional online shop. Notably, 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 specialises in specific fish species and angling techniques, or 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. Membership numbers vary between 30 and 80. Further associations and clubs not solely focusing on 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 to protect fish stock, the natural environment and natural resources.

Polish anglers have to take an exam to get an **angling licence** and to be 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 licence 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. Primary channels used 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 that they 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 limited information on the environmental dimension of sustainability was made available. Few local initiatives have started taking action on sustainability issues. Likewise, Polish service providers did not give any particulars either of diversified offers for females or disabled anglers, or offers or events for juvenile anglers. A similar lack of information predominates in the search for **networks and cooperation** in the Polish case study area. Only a few service providers have entered into networks of providers from different categories or branches. Providers instead expand their services by advertising diverse offers from more than one category, as well as non-angling-related supplementary services. Cooperation is not yet 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 on each country demonstrates the variance not only among countries, but also among single service categories. Before addressing the implications for 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 Figure 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 comparatively low. Providers in Fishing Zealand are also characterised by their strict focus on one service category and angling tourism only. Apart from renting accommodation to other guests as well, almost no supplementary non-angling services are offered.

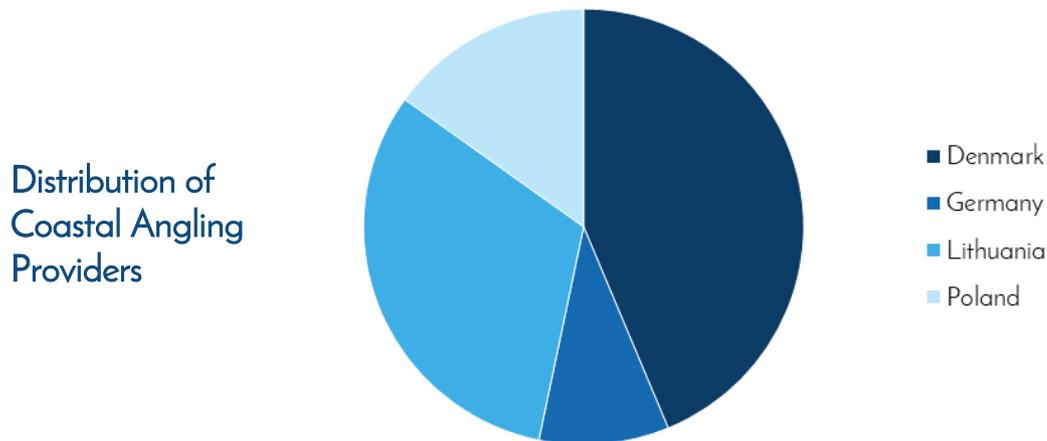


Figure 6: Distribution of Coastal Angling Providers in the CATCH Partner Countries

In the **German** case study area, numbers of providers are likewise unequally distributed among angling service categories, only 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 a few accommodation providers and shops. Despite these mixed offers, the majority of providers focus on offering angling-related services. Only a 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 accommodation. If specialising in more than one category, providers primarily offer a service combination of boat rentals, cutter operators and sometimes accommodation. 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 in more than one category. Most common are service combinations of boat rentals, accommodation 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 rent 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 prevalence and relevance among partner countries are notable. In Denmark, Germany and Poland, only a small portion of service providers fall into this category, while in Lithuania about one-third of providers sell angling equipment. As demonstrated earlier, **accommodation providers** are a major part of Fishing Zealand's membership. More than 50% of cooperating providers specialise in accommodation services targeted at anglers. In contrast, in Poland, Lithuania and Germany only 20-30% of providers offer accommodation for rent, whereas many of these providers offer accommodation in addition to their core businesses and are often not particularly specialised in 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 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 overall angling association. In Lithuania and Poland, far fewer clubs represent a likewise smaller number of anglers. **Licence 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 of purchasing 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 categories presented, Lithuanian providers are increasingly broadening 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 providers – if they even exist – 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 its partners to involve young people in their activities. In the other partner countries, associations and clubs organise events for young anglers. Few to no special offers for female or disabled anglers are promoted. The economic dimension of sustainability was not 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 has 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 organisation of networks and cooperation, however, can vary greatly among regions and service providers. Whereas in the Klaipeda region only a 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, and especially in Poland, collaborations between angling service providers are not that common.

Communication channels and web presences of service providers are similar among all nationalities and among service categories. With only a 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 the listed providers utilise social media channels, including Facebook, YouTube, Google+ and so on. Few providers use the additional possibility of promoting their services through external channels such as tourist websites.

Strong discrepancies exist in the **languages** in which angling services are made available. Besides national languages, English is quite common and a 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 providers in Lithuania and Poland too are proficient 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. They further highlight 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 about the shortcomings of coastal regions and their service providers, as well as 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 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 are widely established, compared to the case study areas in Germany, Poland and Lithuania. Fishing Zealand puts great effort into fostering and strengthening recreational angling and angling tourism. This is realised by strong cooperation with the Denmark Sportfishing Association, business partners, clubs and volunteers. In the other partner countries, the same objective has been set; however, 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 to refer 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 in 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 as 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 at 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-existent **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 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 informational material should be provided in multilingual versions and online presences should be translated. However, these measures may take a while to be effectively in place. In this respect, providers may use the chance to cooperate 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 exist in the Danish case study area. In Germany, only a limited number of providers have sustainability measures in place, whereas the majority do 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 likewise scarcely exist. Merely the sustainability efforts of regional and national associations are common and laudable in 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 recognised and actors must be encouraged to implement the necessary measures. However, 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 comply 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 at the centre of attention. This includes, for example, a reduction in 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 minimise 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 the competitive advantages of providers and communities. This can

be achieved by 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 making. In order to meet stakeholders' needs and avoid disagreements, developments in a region should always consider the perspectives of all affected stakeholders. Going hand in hand with 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 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 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 for long for interesting holiday offers. At the same time, guests can rely on trustworthy and reliable cooperation, so that in case of failure a replacement is found fast.

By comparison, in Germany, Lithuania and Poland only a minority of service providers have specified cooperating with other - angling or non-angling - businesses and providers. Coastal angling service providers can be divided into 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. The 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, their vacations and their overall experience. This also increases the attractiveness of the providers and the region as a whole. The potential originates from a greater 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 realise 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 areas, would greatly benefit from strengthening bonds and partnerships between service providers, but also with other stakeholder groups. Cooperation helps to foster these 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 pursuing 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 both 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 as 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 use their own websites, visibility

is not necessarily guaranteed. It has often been noted that website contexts are not updated. Visitors to a website are therefore uncertain whether the provider is still in business. The layout and design are often outdated and unappealing to 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 a few providers use the chance of free promotion and increasing the visibility of their services via social media channels. The share of providers presented on Facebook or similar channels is low, although a 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 obtaining information 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 on which provider offers trips and tours. It is therefore applicable not only for individual providers but for communities in general to promote local 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 alike. Thus, information on websites and social media channels needs to be made available in different languages in accordance with the target group. Besides national languages, information should at least be presented in English, and 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. For that, information and, for example, trip details have to be presented in a structured and appealing order. Disorganised 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 should be posted regularly and providers need to react to enquiries from interested partners within a 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 at a cross-border level, further shortcomings at 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 needs 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 to be the 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 parties involved. 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 businesses of Fishing Zealand. Furthermore, the 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 characterised by agglomerations of angling providers in the tourist 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 forms of cooperation have to be built, not only sharing links but creating attractive common offers. These

offers can help anglers and visitors by simplifying their search efforts for the right offers and supplementary services. Furthermore, cooperation among service providers enables businesses and communities to tackle new challenges and projects that foster the development of the region. Especially smaller communities away from tourist centres can benefit from this.

In **Lithuania** considerable regional differences were found. In order to ensure that all stakeholders benefit from coastal angling tourism in 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 on not only local but transregional levels. Similar approaches as in the German case study area can be applied to Lithuania. In this regard, cooperation with associations and angling clubs could also be improved. Moreover, numerous Lithuanian providers are characterised by offering various supplementary services. This can be, on the one hand, beneficial to increase attractiveness and use their full capacity, even at a time of fewer 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 specialisation or knowledge on angling-related subjects.

The service landscape of coastal angling tourism in the **Polish** case study area is marked by a comparatively 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 infancy, 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 utilisation of capacity, the interaction of all stakeholders of coastal angling tourism is inevitable. Furthermore, anglers' needs in general have to be more widely represented and angling clubs and organisations strengthened. Overall, Poland could also benefit from the suggestions given to Denmark, Germany and Lithuania.

4.2 Learning from within the Project Area of CATCH

Overcoming shortcomings and implementing 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 made and service providers and coastal communities can profit from the experiences of others. In particular, 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 best practice for the other case study areas. **Fishing Zealand** shows the importance of building and strengthening regional networks with diverse stakeholder groups. Networks and cooperation are not locally limited but spread transregionally 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, anglers' needs can be satisfied, sustainability and development goals reached and also changing conditions 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 to improve quality and educational standards, environmental conditions and the involvement of anglers of all ages. Not only is sustainability considered with regard to service providers, but a holistic concept for the whole area of Fishing Zealand has been developed. Attention is paid to the protection of nature, protection of fish stocks, restoration and so on, and with that the facilitation of sustainable recreational angling. Fishing Zealand is an exemplary holistic model that involves coastal angling tourism but also local anglers, communities and 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 transregional 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 to provide anglers and other guests with everything they need and more. Halbinsel Peenemünde as a single provider offers a wide range of services. These include different types of accommodation, boats for individual tours and guided angling tours. Of interest to anglers are the nearby slipway and the facilities to clean and prepare fish after a successful angling trip. Halbinsel Peenemünde attracts not only anglers, but also families, singles, couples and groups. Besides angling features, it offers a small shop with regional products and antiques, a museum, a restaurant ship, educational talks, barbecues, pony rides, 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 are 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 who are looking 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 nature and its resources. It provides products from regional suppliers and promotes further non-angling offers in the region. Its business is designed for a long-term existence and the services offered 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 its efforts. Halbinsel Peenemünde therefore sets an example of 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 the services offered and ensuring sustainable tourism. The TMV is also concerned with the development of sustainable angling tourism. In this context, the TMV has developed a criteria catalogue for certifying angling accommodation and angling tourist offices. Providers fulfilling all criteria receive a certificate of 'Angelurlaub MV - Geprüfte Qualität' (Angling Holidays Mecklenburg-Western Pomerania - Certified Quality). This ensures the quality of listed providers and serves as useful guidance for anglers and guests. Having certificates in place is a great help for anglers to orientate themselves among 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 the 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 the services of angling guides.

The angler survey revealed that anglers, independent of their nationality, tend to stay in cottages or apartments, at camping sites or at shelters. B&Bs or hotels are less frequented by anglers. Their main criteria for choosing **accommodation** are its location and proximity to an angling spot, space for a boat or their equipment, but also the price of the overnight stay. The findings of the provider survey show that though providers try to attract anglers, their accommodation is 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 great luxury but very specific features. This includes space for drying clothes and storing equipment and facilities to clean, prepare and freeze fish if not

otherwise possible. Where 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 they were too experienced to make use of the services of an angling guide. To increase the 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 and so on has to be highlighted and language skills improved. In addition to general guiding services, supplementary offers can be promoted, including for example preparation of fish or cooking classes, educational offers, unique techniques or further trips to 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 has turned out well.

When asked where anglers usually buy their angling equipment, the majority of participants answered that they buy it in their local **angling shops**. However, they also indicated that they 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 to buy their equipment in online shops. In Fishing Zealand therefore, only a few physical angling shops exist. Bigger shops are found more in urban regions, here mainly in the Copenhagen area. As a consequence, physical shops need to improve their attractiveness for anglers. This can be done by 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 minimise the benefits of purchasing online. Highlighting the

importance and especially the quality of sales advice 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 physical angling shops.

As is already done by a few providers in the case study areas, angling shops can organise 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 licences can be done at the premises of angling shops. In some cases broadening the range of services 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 could then obtain 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 at 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, optimisation of service offers and so on 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 situation of services for coastal angling tourism in the South Baltic Region has become evident. It can be concluded that project areas in part differ greatly in their development states, not only with reference to existing providers or infrastructure, but also in the importance that is attributed to coastal angling tourism in the respective regions.

It is not enough solely to 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 the successful strategies of one region on another. The 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 guidance to develop these strategies. However, they have to be considered carefully and adapted to regional conditions and objectives. This report raises no claim to completeness and only refers to opportunities for improvement grounded in the analysis of participating service providers. It is advisable to consider the implications outlined in this report carefully, as the underlying problems appear not to be isolated cases. The most significant shortcomings found in this analysis involve missing networks among service providers, a lack of 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 the 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 changes for the development 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 have been developed as guidelines for service providers and coastal communities. These indicators have been discussed in stakeholder workshops and adapted to the requirements of sustainable angling. And third, the visibility of service providers can be increased



by being promoted on the upcoming **information platform** of **CATCH**. This platform offers service providers the possibility of presenting 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 higher visibility. For more information, see fishingsouthbaltic.eu.

The suggestions for improvement at national as well as provider levels can also support the development of coastal angling tourism in the South Baltic Region. Therefore - as already mentioned - potential shortcomings have to be carefully evaluated at each level 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 the 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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