Technical Study

MSP as a tool to support Blue Growth

Roundtable discussion paper: Coastal and Maritime Tourism, 11/12 October 2017

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Coastal and Maritime Tourism

1 Introduction

Overall size of the sector and industry structure

✓ Mature ☒ Growing ☒ Emerging ☐

In the EU, coastal and maritime tourism makes up a large share of total tourism, with approximately 45% of all nights spent by tourists on EU territory in 2016[1,2]. Coastal and maritime tourism is one of the activities at the forefront of the Blue Economy and is part of the Blue Growth Strategy. The sector requires innovation and diversification to remain sustainable, competitive and profitable over time and to provide qualified employment. The EC confirmed in 2014 coastal and tourism as a priority area where additional effort at EU level could stimulate long-term growth and jobs in the Blue Economy.

The following segments can be distinguished:

- *Coastal tourism* covers beach-based recreation and tourism (e.g. swimming, surfing, sun bathing), and non-beach related land-based tourism in the coastal area (all other tourism and recreation activities that take place in the coastal area for which the proximity of the sea is a condition), as well as the supplies and manufacturing industries associated to these activities
- *Maritime tourism* covers tourism that is largely water-based rather than land-based (e.g. boating, yachting, nautical sports), but includes the operation of landside facilities, manufacturing of equipment, and services necessary for this segment of tourism[3].

This factsheet focuses more on coastal and maritime tourism as cruise is covered by the factsheet on Shipping.

[1] United Nations World Tourism Organization 2013, 'Sustainable Marine Tourism', presentation to Expert Group Meeting on Oceans, Seas and Sustainable Development: Implementation and follow up to Rio+20, New York, April.
[2] http://ec.europa.eu/eurostat/statistics-explained/index.php/Maritime_economy_statistics_-_coastal_regions_and_sectoral_perspective
[3] Ecorys (2013). Study in support of policy measures for maritime and coastal tourism at EU level.

Time horizons			Spatial characteristics		
Seasonal	Yes	Concentration of visits are traditionally over the summer period – May/June to August/September. This holds for all sea basins[4]. Much of the potential socio-economic gain is concentrated in that period, with large parts of the local facilities typically closing throughout the rest of the year. Vitality of the sector is dependent on several factors including the weather conditions, environmental conditions, aesthetical conditions.	Place based	Yes	Through ports or hospitality venues, otherwise not place based.
Planning horizon	N/A: Planning horizon of the sector is dependent on the subsectors. Long term planning cannot be pinpointed as the sector is per definition volatile		Linear	Yes	
Development time	N/A depends on subsector		Distance to shore and water depth	Distance to shore: 0 to few km Water depth depends on subsector	
			Moving	Yes	Cannot be moved easily

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[4] Ecorys (2016). Specific challenges to maritime and coastal tourism.

Lifetime of installation	N/A depends on subsector	Land Sea interaction	Yes

2 Relevance

General Relevance

Measuring the size of maritime and coastal tourism activity is highly complex and several methods and techniques have been deployed. Challenges lie above all in delineation, both in terms of sector (different statistical classifications are used), geographic delineation as well as target group (depending on the type of residence and type of accommodation). Several studies have thereto arrived at different estimates.

- A conservative (narrow) estimate of coastal tourism (excluding maritime tourism): direct and indirect value added of the blue economy (2014): Euro 85.756 million[5]. Focusing primarily on accommodations.
- A study with a broader perspective (including maritime tourism) arrived at Euro 183 billion in gross value added, and an employment level of 3.2 million people[6]. This broader perspective related in part to the fact that the study included activities such as transport, accommodation, restaurants.
- All studies confirm that the relevance of the sector is higher in terms of share of persons employed than on value added. This is due to the relatively low productivity/wage level as well as the seasonal nature of this sector.

[5] COGEA (2017). Study on the Establishment of a Framework for Processing and Analysing Maritime Economic Data in Europe.

[6] EC (2014) A European Strategy for more Growth and Jobs in Coastal and Maritime Tourism. Communication (2014)86 final, based on Ecorys (2013). Study in support of policy measures for maritime and coastal tourism at EU level.

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Status in each Sea Basin **(Table1)**[7]

Sea Basin	Presence / Status	Potential	Comments
Atlantic	◆	➡	Increasingly alternative to mass tourism.
Baltic Sea	◆◆	➡	Increasingly alternative to mass tourism
Black Sea	◆◆	➡	Mass tourism: environmental pressure on land and traditionally low-profile tourism
East Med	◆◆◆	➡➡	Mass tourism, environmental pressure on land and sea
North Sea	◆	➡	Increasingly alternative to mass tourism
West Med	◆◆◆	➡➡	Mass tourism, Environmental pressure on land and sea; need for diversification acknowledged.

Legend: ◆ = low presence ◆◆ = medium presence ◆◆◆ = high presence
➡ = none /limited potential ➡➡= medium potential ➡➡➡ = high potential

Status in each EU Country

A good yardstick is the comparison of numbers of nights spent in rented accommodations in coastal areas (including business travelers):

Status in each EU Country (Table2)[8]

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[7] Table based on expert judgment and assessment of the sources quoted throughout the document.
[8] Table based on expert judgment and assessment of the sources quoted throughout the document.

Sea Basin	Country	Presence / Status	Potential	Comments
Atlantic	Ireland	◆	➡	Coastal tourists have increased.
Atlantic	Portugal	◆◆◆	➡➡	Attracting more tourists due to diversification of products and securing more charter flights
Atlantic / North Sea	United Kingdom	◆◆		Seaside resorts in marginal decline since 2012
Atlantic / West Med	France	◆◆◆	➡➡	Country ranked Nr. 3 in number of coastal tourists; mass tourism, high profile tourism
Atlantic / West Med	Spain	◆◆◆	➡➡➡	Number 1 in coastal tourism; Mass tourism, increasing diversification, strong growth since 2014
Baltic Sea	Estonia	◆	➡	Mainly coastal forests, wildlife and historic towns
Baltic Sea	Finland	◆		Coastal area has many economic uses including coastal tourism
Baltic Sea	Latvia	◆	➡	Natural surroundings, low profile nature (vortexes) and wildlife tourism
Baltic Sea	Lithuania	◆		Short summer season (with overcrowded coast) halts sector
Baltic Sea	Poland	◆	➡➡	Strength of Polish coastal tourism is the diversity of the landscape and rich cultural heritage. But: undeveloped coastal infrastructure, especially for yachts and other recreational vessels
Baltic Sea	Sweden	◆◆	➡➡	Island exploration, good sea food, seal spotting, spas, fishing villages
Baltic Sea / North Sea	Denmark	◆	➡	Slow (2%) growth in coastal and countryside tourism 2008-2015. Western coastal areas have over 40% foreign bednights.
Baltic Sea / North Sea	Germany			Coastal tourism both in North Sea and Baltic Sea
Black Sea	Bulgaria	◆◆	➡➡➡	Black Sea mass tourism
Black Sea	Romania	◆◆	➡➡➡	Black Sea mass tourism
East Med	Croatia	◆◆◆	➡➡	Nr. 5 in coastal tourism, increasingly high profile tourism
East Med	Cyprus	◆◆	➡	Contribution of travel and tourism to GDP expected to grow. Tourism arrivals steeply increasing since 2014
East Med	Greece	◆◆◆	➡	Nr. 4 in coastal tourism; mass tourism, some diversification

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East Med	Slovenia	◆	➡	Very short coastline, requiring careful use
East Med / West Med	Italy	◆◆◆	➡➡	Nr. 2 in coastal tourism; mass tourism, high profile tourism
North Sea	Belgium	◆◆	➡	Attracting local tourists and tourists from neighbouring countries
North Sea	Netherlands	◆◆	➡	Attracting local tourists and tourists from neighbouring countries
West Med	Malta	◆◆	➡➡	Island and island exploring.

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3 Status and evolution Analysis

Current Status

Coastal tourism continues to grow in terms of numbers of tourists, especially in Mediterranean region and around the Baltic Sea and Atlantic Ocean. Since the political instability and security concerns in Southern neighbouring countries, coastal tourism has shifted from those countries to European countries, especially to the Mediterranean countries for the traditional sun, sand and sea holiday, while for other types of coastal related holidays destinations around the Baltic Sea and Atlantic Ocean have become more popular. As a result, the overall number of visitors in Europe is increasing. Nevertheless, average spending per night staid and number of nights stays tend to decline over time, thus putting serious pressure on existing (mass) tourism models – in terms of socio-economic and environmental cost/benefit ratios. Other types of tourism, e.g. ecotourism and nautical tourism, are experiencing growth. A part of the tourists longer opt for the traditional sun, sand and sea holiday in the Mediterranean, but are looking for other experiences and destinations. Renting a boat or yacht has become more popular, as have the usage of other forms of accommodation (Airbnb or free camping when allowed)[9].

Drivers

- ✓ **Economic growth**: Economic growth has brought financial opportunities to travel, as the purchasing power has increased. In addition, some travel options, especially through air (due to the introduction of low costs carriers) have become cheaper.
- ✓ **Security issues** (mainly for Southern Europe): Coastal and maritime tourism is considered less safe in the Middle- East and North Africa.. Southern European destinations benefit from this development.
- ✓ **New and existing environmental legislation**: There is an increased demand for environmentally friendly services and equipment.
- ✓ **Diversification of the touristic product**: Connecting the traditional sun, sand and sea tourism sector to other (water) sectors, including fisheries (angling), underwater cultural heritage and ecotourism. This calls for a spread of the touristic offer spatially (e.g. more remote destinations are offered) and beyond the transport and touristic infrastructure that needs to be developed, in some cases, also spatial resources in between need to be committed, e.g. for nautical tourism to be able to sail from one destination to another, provision needs to be made for safe sailing routes.
- ✓ **Quality of natural features and landscape**: EU surveys have shown that these are the predominant factors for choosing the destination of holidays in coastal areas. This adds to the understanding that natural capital is of prime importance for the tourism sector, which is increasingly environmentally conscious due to progressive 'greening' policies and fiscal measures.

Barriers & Bottlenecks

Note: *Direct spatial implications* would be those which already hold a spatial characteristic (i.e displacements, re-routings, etc.); *Indirect spatial implications* would be those which might occur or not depending if we solve the barrier/bottleneck or not (i.e. efficiency improvements might bring more efficient developments and less new developments might be needed in the future which would create less spatial implications in terms of less space required)

Barriers & Bottlenecks	Direct spatial implications	Indirect spatial implications	Comments
Working conditions			Tourism jobs are often seasonal/temporary and relatively low-skilled
Digitalisation:			Uptake of digital solutions is relatively slow in the sector. For instance, many marinas do not yet have an online booking and payment system. Also not all boats have digital applications for sailing etc. on-board.
Seasonality of demand			Concentration of visits are traditionally over the summer period May to September, which implies that much of the potential socio-economic gain is concentrated in that period, with large parts of the local facilities typically closing throughout the rest of the year.
Fragmented and uncoordinated sector			A lack of synergies amongst subsectors is emerging in many cases across the EU Sea-basins. This results in limited economic spill-over effects amongst the different segments of tourism. Cooperation amongst businesses and local institution seems to be limited particularly in remote areas and where different Member States are involved in the same Sea-basins. Available anecdotal evidence suggests a structural lack of cooperation, due to competition between neighbouring locations rather than virtuous collaboration, which is blocking innovation in the sector and prevents them from more successful competition with other EU Sea-basins.
Biodiversity:			Tourism density is mainly concentrated in coastal areas (next to mountain and lake areas). This has caused an increase in construction and infrastructure, which consequently put environmental pressure on protected and other natural and semi-natural territories. As a result, and mainly in the Mediterranean, tourism infrastructure and activities have often

[9] Eurostat

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			irreversible effects on biodiversity, resulting in habitat deterioration for both terrestrial and aquatic plants and animals.[10]
Drinking water and waste water			Coastal tourism pushes up demand for drinking water, which is increasingly scarce especially so in the Mediterranean sea-basin. Also volumes of waste water increase rapidly – with pressures on waste water capacity
Pollution			Air as well as water pollution due to large numbers of tourists as well as recreational boats making use of the coastline. Increased coastal tourism, together with other land-based activities is a large contributor to marine litter (plastics, sewage).[11] The large number of tourists also affects the bathing water quality. It becomes more difficult to prevent bathing water pollution, when many tourists are negligent towards prevent waste from coming into the sea.
Pressure on port infrastructure			Alongside the existing sea passenger demand for port infrastructure, the growth of the cruise market and the increase of the size of ships puts pressure on the existing port infrastructure which provides at many cases the access point to coastal and especially insular destinations, particularly on the popular 'must see' destinations. The number of passengers per annum increases and the peaks of passengers arriving in the port at the same time increase too. These may be related to two major causes, or a combination of the two: 1) the fact that space at coastal destinations is limited and 2) the fact that cruise ship arrivals result in peaks of several thousands of passengers at a time. Limited space around the terminal calls for well-planned traffic circulation.

[10] Plan Bleu, ed. (2012). Seaside tourism and urbanisation: environmental impact and land issues.
[11] Ecorys (2017), Supporting study for an Impact Assessment for the Revision of Directive 2000/59/EC on Port Reception Facilities

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The tourism industry in general is composed of many different sectors, of which the coastal sector is only a part. Hence, policy responses are fragmented across multiple areas of a complex multi-level legal framework, most importantly EU legislation on the one hand and national member state legislation on the other hand. A comprehensive policy reference framework for the tourism sector is lacking, and therefore also for the coastal tourism sector. Legal aspects/provisions on coastal tourism are present in the following legal documents[12]:

- Directive 2014/89/EU establishing a framework for maritime spatial planning
- Strategic Environment Impact Assessment Directive (2001/42/EC)
- Marine Strategy Framework Directive (Directive 2008/56/EC)
- Renewable Energy Directive (Directive 2009/28/EC)
- Habitats Directive (Council Directive 92/43/EEC)
- Directive 2001/42/EC, setting the provisions for assessment of environmental effects of MSP

Next to these, the following EC communications and Working Documents are important:

- EC Communication: Blue Growth opportunities for marine and maritime sustainable growth, Brussels, 13.9.2012 COM(2012) 494 final.[13]
- EC Communication: A European Strategy For More Growth And Jobs In Coastal And Maritime Tourism, Brussels, 20.2.2014 COM(2014) 86 final.[14]
- EC Communication: Initiative for the sustainable development of the blue economy in the western Mediterranean, Brussels, 19.4.2017 COM(2017) 183 final.[15]
- Commission Staff Working Document on Nautical Tourism, Brussels, 30.3.2017 SWD(2017) 126 final.[16]

[12] List is not exhaustive
[13] http://ec.europa.eu/transparency/regdoc/rep/1/2012/EN/1-2012-494-EN-F1-1.Pdf
[14] http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52014DC0086&from=EN
[15] https://ec.europa.eu/maritimeaffairs/sites/maritimeaffairs/files/com-2017-183_en.pd
[16] https://ec.europa.eu/maritimeaffairs/sites/maritimeaffairs/files/swd-2017-126_en.pdf

Trends

Specific trends that have consequences for the coastal tourism sector in the EU include[17]:

- **Decrease in length of stay:** Average expenditure by night has been decreasing over time, and so has been the average length of stay. It is expected that this trend will continue, and possibly even become stronger once competing destinations outside the EU gain or regain competitiveness.
- **Increase in non-EU tourists:** The so-called BRIC countries with large populations and on-going strong economic growth rates have seen a rise in larger, relatively well-off middle classes and a growing number of rich upper-class tourists.
- **Tourism throughout the year – as opposed to mainly during peak periods[18]:** The internet based-economy, globalising communication, increasing affordability to travel for a larger share of the population have caused a trend for tourists to travel throughout the year.
- **Recovering nautical sector (mainly in the Mediterranean sector):** Connecting the destinations can stimulate the sector to develop further.
- **Policy enabling sustainable coastal tourism:** Increasing pressure is put on the (environmental) sustainability of coastal touristic areas.

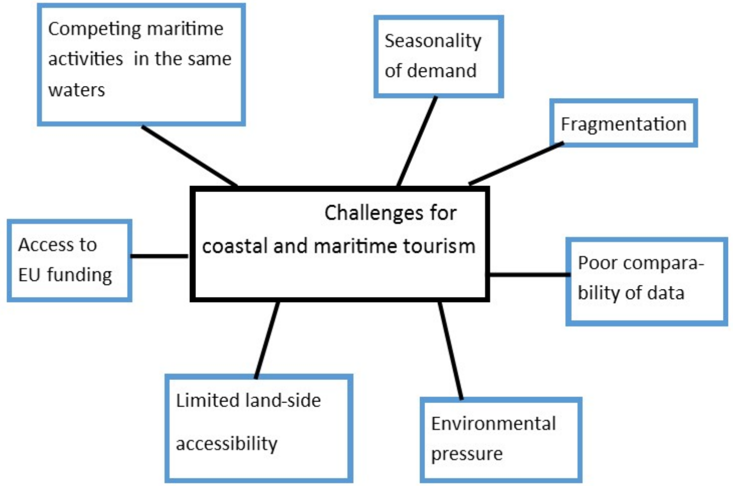

Image adjusted by Ecorys from: European Commission (2012). A European Strategy for more Growth and Jobs in Coastal and Maritime Tourism.

[17] Ecorys (2016). Specific challenges to maritime and coastal tourism.
[18] Source https://www.eea.europa.eu/soer-2015/europe/tourism

Scenarios for coastal tourism

The above trends have diverse implications for existing and emerging maritime and coastal tourism destinations and concepts. These developments can be captured through four trend scenarios:

Mass tourism targets or attracts high volumes of visitors with a relative low average spending potential. Traditionally this took place along the Mediterranean coast (Spain, Italy, Greece), but increasingly the Bulgarian Black Sea coast attracts EU as well as non-EU tourists. Puts environmental pressure on land. Due to changing preferences of tourists, this concept is put under pressure. Tourists seem to prefer either high profile, luxurious holiday destinations or low profile, back to nature, holiday destinations. It is expected that the number of tourists opting for the traditional sun, sand and sea holidays will stabilize or even slightly decline. Nevertheless, the spatial implication of this type of tourism will remain the same.

High profile tourism attracts tourists across a variety of age groups, social statuses, and nationalities. It offers a relatively unique value and high level of quality. High profile tourism is characterised by a relatively high volume of visitors and consequently average spending. The sector can capitalise on local inhabitant and on both EU and non-EU wealthy tourists. Puts environmental pressure on land and also additional space for further development of this touristic sector will be required. As this type of tourism becomes more popular, it is expected that the number of tourists opting for such a holiday will increase the coming years. As tourists are willing to pay for a luxurious holiday and all kind of additional services/activities to increase their holiday experiences it is also expected that spending in this sector will increase substantially.

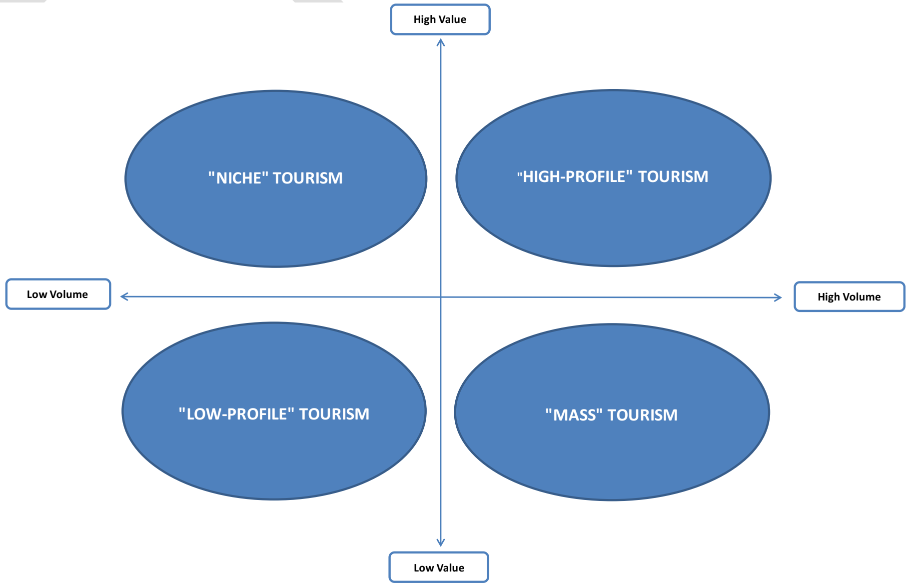

Figure: **Scenarios for coastal tourism** (Source: Ecorys 2013)

Niche tourism potentially attracts lower amounts of tourists, as it focuses on specific added-value services or locations. However, these tourists may value quality of services better than cost-effectiveness, as they are willing to spend more. Puts limited environmental pressure on land and also the spatial implications will remain limited. Potential in Baltic and Atlantic Sea basins. Tourists with a preference for a sea bird watching holiday or a holiday with angling activities will more frequently opted for this form of niche tourism. The growth of this sector will strongly depend on holiday accommodation (e.g. accommodation in areas with rare sea birds). If accommodation possibilities increase, this sector is likely to grow. Nevertheless, if no such accommodations is developed, the growth of this sector will remain limited. As niche tourism often occurs in areas with limited facilities, touristic spending will not increase substantially.

Low profile tourism has a low density character, a low average impact on the environment and an interest in natural areas as destinations. This type of tourism has been growing since the environmental movement of the 1970-1980s. Puts limited environmental pressure on land and also the spatial implications remain limited. As environmental awareness is still increasing among people in general and tourists in particular it is likely that the number of tourists opting for an eco-friendly holiday will increase in the coming years. Nevertheless, touristic spending will not increase substantially as this type of tourism occurs in nature areas and tourists will opt for activities like hiking, walking and biking. They will not spent much money on other activities.

4 Spatial Consequences of Future Trends

Implications

The expected continued growth in coastal tourism, along all four of the indicated sections, both in terms of nights spent in coastal regions but also in number of tourists, has implications for onshore spatial planning, such as the construction of new infrastructure and ports. The recreational boating segment is expected to remain popular, implicating that the number of boat usage will grow. To allow all craft to have berthing spots, additional space in existing marinas is required on the longer term (in the short run – 2 to 5 years- marinas still have sufficient capacity to accommodate all craft). It is not likely that many new marinas will be developed, as the marina density is already high (approx. 4,700 salt-water marinas in EU-28 or 1 marina per 14 km coast line)[19]. In addition, recreational craft, with the exception of super yachts, will not get bigger due to physical limitations of popular marinas (i.e. the so-called 'Cannes standard'). Nevertheless, it is expected that hotel or other touristic accommodation will be developed along the coastline. This development of the sector combined with the diversification of the sector can have possible implications in the context of marine spatial planning as connecting different sectors requires mobility between the MSP sectors, and thus requires infrastructure on land to enable mobility for example between recreational craft, interesting ecological zones at sea and underwater cultural heritage. However, co-existence of the coastal tourism sector with other MSP sectors leads to land-sea

[19] Ecorys (2016). Specific challenges to maritime and coastal tourism.

interactions and consequently water quality issues. Hence, even though space may not be shared by coastal tourism and other MSP sectors, the environmental impacts of the other sectors may impact coastal tourism activities. An example of this are ships that leak oil. This mechanism goes both ways: an example being trash left behind by beach guests get in the water, affecting the water quality.

Linked to the increase of the sector is the adaptation to climate change. When coastal cities flood, when coastal deltas change substantially or when the water becomes salty, tourism is not possible. Coastal defence is of prime importance to counter coastal erosion and to enable tourism. Depending on its exact location coastal defence solutions may have maritime spatial implications and planning might be required. The implications for marine spatial planning are that flooding plans need to be considered. The density of (off shore) oil and gas platforms is increasing, especially in some of the most touristic areas in the Mediterranean. However, the two uses coexist and do not necessarily interfere.

Relationship with other sectors

Competing maritime economic activities such as nautical tourism and wind farms can compete for the same maritime space. Competing activities in the same waters may deter or prevent investments. These activities may also increase waste generation and energy and water consumption, exacerbate the exploitation of biological and other resources and ultimately lead to more pollution and a serious deterioration of marine and coastal ecosystems.

The matrix below indicates the potential Tourism compatibility with other marine sectors. The matrix below indicates the potential of the Tourism & Recreation sector's compatibility (synergies and conflicts) with other marine sectors. Note: red = potential conflicts; green = potential synergies; grey = not applicable.

		Shipping & Ports	Tourism & Recreation	Oil & Gas Extraction	Pipelines & Cables	Fishing	Aquaculture	Marine Renewables	Marine Aggregates	Conservation
Tourism & recreation	Synergies									
	Conflicts/Risks									

- **Tourism and Shipping** are semi-compatible: Coastal tourism activities can still take place when ships are in the water.
- **Tourism and Ports** are semi-compatible: For the same reason as Tourism & Shipping.

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- **Tourism and Oil & Gas extraction** tend to create conflicts/tensions: Oil & Gas extraction infrastructure can have consequences for coastal tourism through changing horizon, and the strong deterrence of such activities on coastal tourists. In case of an accident, mainly oil leakages, coastal areas can be polluted which will hamper coastal tourism.
- **Tourism and Pipelines & Cables** are compatible: Pipelines & Cables are under the ground, while coastal tourism activities are on the coast or on or in the water.
- **Tourism and Fishing are semi-compatible**: When subsectors of fishing are considered coastal tourism, such as pesca-tourism or sports fishing, the sectors are compatible. However, when fishing is done for other reasons (commercial fishery), these sectors cannot be combined spatially.
- **Tourism and Aquaculture are semi-compatible**: when practiced far enough off shore
- **Tourism and Wind Energy are semi-compatible**: Wind Farms can negatively impact the leisure zone and the aesthetics of the coastal landscape. This in turn can have a negative impact on the demand in these touristic areas, as the recreational value decreases. A critical parameter is the distance to shore, and with growing distances the tension decreases. However, some small-scale initiatives emerge now in the form of excursions to offshore wind parks.
- **Tourism and marine aggregates are semi-compatible**: offshore sand formations such as islands can offer tourism opportunities; however exploration and exploitation activities themselves are not considered compatible with tourism.
- **Tourism and Conservation tend to create conflicts and tensions**, especially through mass tourism, as coastal tourism (likewise cruise tourism) can put pressures on the eco-system (mostly through waste water, water pollution, and other forms of pollution as well as trespassing). However, synergies emerge through alternative scenario's, including eco-tourism, such as conservation tours etc.

5 Resources / Actors / References

Projects:

Name	Type of Project	Duration	LINK	Short explanation
CO_EVOLVE	INTERREG MED 2016 modular project developed under the Programme's priority axis 3 (natural and cultural resources) and	Nov 2016- Oct 2019 (36 months)	http://www.ismar.cnr.it/projects/international-projects/project-001/co_evolve-project?set_language=en&cl=en	Promoting the co-evolution of human activities and natural systems for the development of sustainable coastal and maritime tourism

	specific objective 3.1 (sustainable tourism).			

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- sustainable-projects.eu/index.php?cmd=download&subcmd=downloads/170608_FINAL_REPORT-V1.1-PDF-small.pdf (Implementation Strategy Baltic Blue Growth Agenda – Chapter on Tourism!)

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