

Sector Fiche:

Coastal and Maritime Tourism

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1 Basic Facts

Gross Value added	State of the sector	Presence across sea basins
€183 billion ¹	Mature and growing ² .	Dispersed throughout all sea basins, strong in Mediterranean region and growing around the Baltic Sea and Atlantic Ocean ³

Land-sea interaction	Temporal aspect	Lifetime of installations
Yes ⁴ .	Strong seasonality ⁵ .	Depends on sub-sector

Interaction with other uses

Semi-compatibility with most uses⁶.

¹ European Commission (2014).

² Ecorys (2016).

³ Ibid.

⁴ EU MSP Platform (2017).

⁵ European Commission (2014).

⁶ Ecorys (2012).

2 Composition of the coastal and maritime tourism sector

The following typologies can be distinguished by: i) location and ii) sub-sector⁷:

By location	Coastal tourism	Covers tourism in the coastal area as well as the supplies and manufacturing industries associated to these activities.
	Maritime tourism	Covers tourism in the maritime area.
By sub-sector	Beach-based	Covers beach-based recreation and tourism (e.g. sun bathing, walking in the beach, kite competitions, etc.), 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.
	Water-based	Covers tourism that is largely water-based rather than land-based (e.g. swimming, canoeing, surfing, wind-surfing, sport fishing, diving, snorkelling, underwater cultural heritage, whale watching, seabirds watching, boating, yachting, nautical sports, etc.), but includes also the operation of landside facilities, manufacturing of equipment, and services necessary for this segment of tourism.

Figure 1: Composition of the coastal and maritime tourism sector

Cruising can be also considered part of coastal and maritime tourism. However, this sector fiche focuses more on above mentioned typologies of coastal and maritime tourism as cruise is covered by the sector fiche on shipping and ports.

3 Relationship between coastal and maritime tourism and MSP

3.1 What are present spatial needs of the coastal and maritime tourism sector?

Depending on the sub-sector, maritime and coastal tourism is both a linear and area based activity. In most cases maritime activities take place along the coastline as well as between the shore and on-water tourism activity areas⁸, while for instance diving, snorkelling and underwater cultural heritage are place-based activities. The distance to shore is typically between zero and few km. Water depth depends on sub-sector needs and might be a crucial element for certain activities (e.g. water-based activities such as boating, yachting, nautical sports).

Although mass tourism (characterised by a tendency to target or attract high volumes of visitors with a relative low average spending potential⁹) is likely to stabilize or even decline in the future, the spatial implication of this type of tourism will remain the same: direct use of sea space mainly along the coast, impacts on the sea environment and water quality in particular and environmental pressure on land are among the factors deserving special attention within MSP processes¹⁰.

Demand for additional infrastructure and services/activities is likely to increase with the growing success of high profile tourism, characterised by a relatively high volume of visitors, high level of quality and unique value¹¹.

Also the growth of so-called niche tourism (characterised by specific added-value services or locations) will strongly depend on holiday accommodation (e.g. accommodation in areas with rare sea birds). In turn, niche tourism is likely to impact areas with limited facilities and of high sensitivity, hence requiring specific infrastructures and innovative, yet spatially limited, solutions in e.g. natural and protected areas¹².

The progressive diversification of coastal and maritime touristic offers and activities (e.g. bathing tourism, swimming, sport fishing, boating, yachting, surfing, sailing, snorkelling, diving, cruising) can lead to conflicts among different tourist segments at the local level¹³.

⁷ Ecorys (2016).

⁸ Ecorys (2013).

⁹ Ibid.

¹⁰ Ecorys (2013).

¹¹ Ibid.

¹² Ecorys (2016).

¹³ MMO (2014).

3.2 Which anticipated future developments of the industry are relevant to MSP?

Continued growth

The expected continued growth in coastal tourism, both in terms of nights spent in coastal regions but also in number of tourists, has implications on onshore spatial planning mainly through the construction of new infrastructure and port¹⁴. 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 marinas¹⁵ in EU-28 or 1 marina per 14 km coastline). In addition, recreational craft, with the exception of super yachts, will not get bigger due to physical limitations of popular marinas. Nevertheless, it is expected that hotels or other touristic accommodation will be developed along the coastline. This development of the sector combined with its diversification can have possible implications in the context of MSP as connecting different sectors requires mobility between the MSP sectors, and thus needs infrastructure on land to enable mobility, for example, between recreational craft, interesting ecological zones at sea and underwater cultural heritage¹⁶⁻¹⁷.

Environmental impacts of other sectors

The environmental impacts of other sectors may impact coastal tourism; any maritime and land-based activity affecting environmental quality can in principle negatively affect this sector. Co-existence with other MSP sectors not only depends on direct spatial conflicts; even though space is not directly shared between tourism and other sectors, conflicts might arise due to indirect connections also related to land-sea interactions. Coastal and maritime tourism highly depends on good environmental conditions and in particular on good water quality in particular. An example of this are ships that leak oil¹⁸. This mechanism goes both ways: an example being the trash left behind by beach guests in the water, affecting the water quality and activities depending on it (e.g. the same tourism or even aquaculture).

Adaptation to climate change¹⁹

Coastal areas might be affected by a number of climate change related impacts (e.g. flooding, erosion, saltwater intrusion, increase in temperatures and periods of dry/drought) that can have direct and indirect effects on coastal and maritime tourism. Coastal defence is of prime importance to counter coastal erosion and flooding and maintain tourism facilities and activities. Depending on its exact location coastal defence solutions may have maritime spatial implications (e.g. conflicts with fishery or shipping) and planning might be required. Plans dealing with coastal vulnerability and protection should be considered to evaluate implications in terms of MSP.

¹⁴ Ecorys (2016).

¹⁵ Formenti, P. (2014).

¹⁶ Ibid.

¹⁷ European Commission (2012).

¹⁸ Ecorys (2016).

¹⁹ Cadiou et al. (2015).

4 Interaction with other sectors²⁰

Shipping and ports	Oil and gas	Pipelines and cables
 <ul style="list-style-type: none"> Tourism and ports are semi-compatible, as arrivals generate wealth and business opportunities but also represent a challenge for ports, reception and urban infrastructure as well as for the environment. Port efficiency for the development of connection gateways for coastal regions remains a crucial requirement for the economic development of coastal and inland areas. Tourism and shipping are semi-compatible. While cruise shipping is an important vehicle for maritime and coastal tourism development, freight transport can be seen as a conflicting activity in terms of demand for space. 	 <ul style="list-style-type: none"> Tourism and oil and gas extraction tend to create conflicts/tensions: oil and gas extraction infrastructure can impact coastal tourism through changing landscape horizons and may represent a deterrent on coastal tourists. In case of an accident such as an oil leakage, coastal areas may have to bear the environmental consequences which would have an effect on tourism presence in those areas. Social acceptance of offshore oil and gas platforms might be low if these are close to the coasts, in particular in tourist areas. Nevertheless, experiences of coexistence can be observed, proving that oil & gas extraction is not systematically in conflict with traditional and locally-anchored sectors, such as small scale fisheries and coastal tourism. 	 <ul style="list-style-type: none"> Tourism and pipelines and cables appear to be semi-compatible: pipelines and cables are under the ground, while coastal tourism activities are on the coast, on or in the water. However, cables and pipelines may have an impact on underwater cultural heritage as well as conflicts relating to anchoring damages between recreational boating and cables and pipelines might occur²¹.
Fishing	Marine aquaculture	Offshore wind
 <ul style="list-style-type: none"> The compatibility between tourism and fishing depends on the sub-sectors: when sub-sectors of fishing are considered coastal tourism, such as pesca-tourism or sports fishing, the sectors are compatible. However, for commercial fisheries these sectors can hardly be combined spatially. Equally so, in some cases the two sectors do not conflict as there is no spatial overlay between activities, e.g. trawling far from coastal areas does not affect many forms of tourism. 	 <ul style="list-style-type: none"> Tourism and aquaculture are semi-compatible: when practiced far enough offshore, so to reduce visual pollution. However, finfish aquaculture along the coast can impact ecosystem health and environmental quality, which are considered essential assets for coastal and maritime tourism. 	 <ul style="list-style-type: none"> 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 tourist 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.
Marine aggregates		Conservation
 <ul style="list-style-type: none"> 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. 		 <ul style="list-style-type: none"> Tourism and conservation tend to create conflicts and tensions, especially through mass tourism, as coastal tourism (likewise cruise tourism) can put high pressures on the ecosystem (mostly through waste water, water pollution, and other forms of pollution as well as trespassing). However, synergies may emerge through alternative scenarios, including eco-tourism activities and initiatives developed in collaboration with e.g. Marine Protected Areas.

²⁰ Ecorys (2012).

²¹ Coastal and Maritime Tourism sectors and the implementation of the MSP Directive (2015).

5 Recommendations for MSP processes in support of the sector

<p>Importance Land-Sea Interaction</p> <p>MSP is a tool for implementation of tourism strategies as it ensures sustainability and availability of infrastructure required. In this regard, LSI aspects are highly important, as most of the needed infrastructure is land-based.</p>	<p>A tool for synergies with other sectors</p> <p>MSP can be a tool to increase synergies with other marine sectors such as aquaculture and fisheries (e.g. pesca-tourism and angling), conservation (e.g. sustainable forms of niche tourism and environmental conservation of key natural assets), and underwater cultural heritage (e.g. diving and snorkelling).</p>	<p>Diversification</p> <p>The tourism and recreation sector can benefit from diversification prompted by MSP through time (ensuring availability and accessibility of intermodal connections throughout the year), space (ensure sustainable number of visits and sustainable effects on ecosystem of new and existing infrastructure and picks of visits and regulate/disincentive peaks of visits) and new activities (provide template for increasing synergies and managing tensions across activities between tourism and other sectors)</p>
<p>Stakeholder involvement</p> <p>As the sector appears to be fragmented, MSP can create opportunities for bringing together different actors. But to be effective MSP should involve the different governance levels and, whenever possible, reach out to local communities and stakeholders.</p>	<p>Synergies and economic gains for this sector</p> <p>A sustainable tourism and recreation sector can only thrive within a sustainable environment. The ecosystem is not just a natural resource, but should be seen as an enabler of synergies and a source of economic gains for the sector.</p>	

6 Resources²²

6.1 Legal framework

Organisation	Title	Link	Short explanation
European Commission	Commission Staff Working Document on Nautical Tourism, Brussels, 30.3.2017 SWD(2017) 126 final	https://ec.europa.eu/maritimeaffairs/sites/maritimeaffairs/files/swd-2017-126_en.pdf	The Document analyses actions to be undertaken in the field of nautical tourism and describes possible options to unleash the potential for additional jobs and growth.

6.2 Actors

Name	Link	Short explanation
Cruise Lines International Association (CLIA)	https://www.cliaeurope.eu/	CLIA is the world's largest cruise industry trade association. CLIA Europe promotes the interests of cruise ship operators within Europe.
European Boating Industry	http://www.europeanboatingindustry.eu/	European Boating Industry represents the interests of the European leisure marine industry and its members.
European Sea Ports Organisation (ESPO)	https://www.espo.be/	ESPO represents the common interests and promotes the common views and values of its members to the European institutions and its policy makers.
European Tourism Association (ETOA)	http://www.etoa.org/	ETOA is the leading trade association for tour operators and suppliers with business in European destinations, including tour and online operators, intermediaries and wholesalers; European tourist boards, hotels, attractions and other tourism suppliers.

²² The information provided under this section is non-exhaustive. The intention is to provide the reader with basic information on the sector.

6.3 Initiatives

Name	Link	Short explanation
AMPAMED	http://www.msp-platform.eu/projects/areas-marinas-protegidas-del-mediterraneo	The Project relies in the role of MPA for the sustainable development of local economic activities like artisanal, fishing and tourism. The main aim has been to use three Mediterranean MPAs, placed in three different regions to show the differences and the similarities in management resources and sustainable development.
BalticRIM	http://www.msp-platform.eu/projects/balticrim-baltic-sea-region-integrated-maritime-cultural-heritage-management	The project analyses the relationship between maritime cultural heritage and maritime spatial planning in the Baltic sea region.
CO_EVOLVE	https://co-evolve.interreg-med.eu and http://www.msp-platform.eu/projects/co-evolve-promoting-co-evolution-human-activities-and-natural-systems-development	The project promotes the co-evolution of human activities and natural systems for the development of sustainable coastal and maritime tourism
Pan-European Dialogue between Cruise operators, ports and coastal tourism stakeholders	https://ec.europa.eu/maritimeaffairs/content/pan-european-dialogue-between-cruise-operators-ports-and-coastal-tourism-stakeholders_en	The European Commission promoted a structured dialogue on cruise tourism to enhance synergies in the sector, targeting best practice sharing in innovation, competitiveness and sustainability strategies. The launching conference took place in Brussels, 5 and 6 March 2015.

6.4 Selected literature

Author	Title	Link	Short explanation
COGEA	Study on the Establishment of a Framework for Processing and Analyzing Maritime Economic Data in Europe	https://webgate.ec.europa.eu/maritimeforum/en/node/4009	The study aimed to cross-check existing numbers defining and measuring the blue economy in the EU and provides additional detail on the sector from other sources.
Cruise Lines International Association	The Cruise Industry: contribution of cruise tourism to the economies of Europe	http://www.cliaeuropa.eu/images/downloads/reports/CLIA_2014.pdf	The report demonstrates the role cruise tourism can play in regenerating and rebalancing the European economy.
Ecorys	Scenarios and drivers for Sustainable Growth from the Oceans, Seas and Coasts	https://webgate.ec.europa.eu/maritimeforum/en/node/2946	The project aimed to provide policy-makers at EU and sea basin level with a comprehensive, robust and consistent analysis of possible future policy options to support smart, sustainable and inclusive growth from the oceans, seas and coasts.
Ecorys	Study in support of policy measures for maritime and coastal tourism at EU level	https://ec.europa.eu/maritimeaffairs/sites/maritimeaffairs/files/docs/body/study-maritime-and-coastal-tourism_en.pdf	The study aimed to support the preparation of policy measures for maritime and coastal tourism at EU level.
Ecorys	Study on specific challenges for a sustainable development of coastal and maritime tourism in Europe	https://publications.europa.eu/en/publication-detail/-/publication/ab0bfa73-9ad1-11e6-868c-01aa75ed71a1	The project looked at ways to improve island connectivity and the design of innovative tourism strategies for (remote) islands, the promotion of a diversified tourism offer, and innovative practices for marina development.
Plan Bleu	Seaside tourism and urbanization: environmental impact and land issues	http://planbleu.org/en/publications/tourisme-balneaire-et-urbanisation-impacts-sur-lenvironnement-et-enjeux-fonciers	The report assessed the sustainability of eleven tourist destinations.
S.Pro, Ecorys	Towards an implementation strategy for the sustainable blue growth agenda for the Baltic sea region	https://ec.europa.eu/maritimeaffairs/documentation/studies/towards-implementation-strategy-sustainable-blue-growth-agenda-baltic-sea_en	The report presents the results of a systematic stakeholder dialogue in the Baltic sea region aiming to identify and discuss in greater depth the processes necessary to realize the Baltic Blue Growth Agenda in the coming years.
Stiftung Offshore Windenergie	The impact of offshore wind energy on tourism. Good practices and perspectives for the South Baltic Region	http://www.southbaltic-offshore.eu/reports-studies-the-impact-of-offshore-wind-energy-on-tourism.html	The study shows how offshore wind farms can be integrated into regional tourism concepts by looking at real-world examples from the North Sea and Baltic areas.

7 List of acronyms

Acronym	Full title
CLIA	Cruise Lines International Association
ESPO	European Sea Ports Organisation
ETOA	European Tourism Association
LSI	Land and Sea Interaction
MPA	Marine Protected Areas
MSP	Maritime Spatial Planning

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<i>Coastal and Maritime Tourism sectors and the implementation of the MSP Directive: Information to stakeholders and planners</i> (2015) [Draft version November 2015].	https://webgate.ec.europa.eu/maritimeforum/en/system/files/27112015Tourism%20MSP%20version1.pdf
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Ecorys (2013). <i>Study in support of policy measures for maritime and coastal tourism at EU level</i> .	https://ec.europa.eu/maritimeaffairs/sites/maritimeaffairs/files/docs/body/study-maritime-and-coastal-tourism_en.pdf
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