

Understanding the Demand and Supply of Fisheries-Linked Tourism in Brittany: A mixed-methods study of diversification pathways and visitor preferences

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Authors : Catherine LAIDIN et Carole ROPARS-COLLET

Long abstract

Introduction

In the face of difficulties accessing fishery resources linked to Brexit, the deterioration of certain fish stocks and contamination affecting shellfish farming, the fishing industry is rethinking its economic activities. The EU-funded FISATUR project is examining how tourism could generate additional income and support the blue economy within the fishing and aquaculture sectors.

This article contributes to fisheries-related tourism and diversification research by: Firstly, it empirically demonstrates how actor configurations shape the emergence of tourism as a diversification tool in fisheries-dependent coastal areas. Secondly, it shows how discrete-choice and latent class approaches can inform policy and business decisions in emerging blue economy niches.

Literature review

A number of studies have examined the different types of tourism linked to fisheries activities, including fishing tourism, visits to auction markets and processing facilities, and maritime heritage museums. These studies highlight the importance of these activities as a means of achieving economic diversification in fishing-dependent coastal communities. González and Antelo (2020) analyse the interactions between fishing and tourism in Galicia, identifying opportunities for sustainable rural development. Meanwhile, Chen and Chang (2017) describe Taiwan's successful transition from traditional fishing to tourism, supported by policies promoting the diversification of fisheries activities.

Other studies have examined the relationship between tourism and fishing, exploring economic synergies through the European Fisheries Fund (Miret-Pastor et al., 2020), as well as the territorial nature of tourism attractions (Pocheau et al., 2019). These analyses highlight structural and institutional complementarities. Ropars-Collet et al. (2015) demonstrate that professional fishing can contribute as much as beaches or coastal heritage to the tourist appeal of coastal regions, particularly through the presence of fishing boats in ports and the direct sale of seafood products to consumers. Ceccacci et al. (2024) demonstrate that the presence of small-scale capacity (e.g. vessels) enhances the appeal of coastal areas.

These studies validate the enhanced attractiveness of coastal areas driven by fishing and the strengthening of fisheries sectors through tourism diversification. However, they do not address the configurations of actors that co-construct these tourism activities in coastal areas, nor how these configurations adapt to emerging demand. This article fills these gaps by empirically demonstrating the role of these configurations, using discrete-choice and latent class approaches to inform policy and business decisions in emerging blue economy niches.

Methodology

Drawing on a Brittany case study — a key fisheries region accounting for around 45% of French landings and experiencing significant tourism growth — this paper employs a mixed-methods design that combines a qualitative multiple case study of supply and a stated-preference choice experiment on demand.

Regarding supply, a qualitative case study approach was implemented. First, a systematic inventory of tourism initiatives linked to fisheries, aquaculture, and maritime heritage was carried out across Brittany's coastal areas. Then, a purposive sample of initiatives was selected to reflect the diversity of tourist destinations, organizational forms, and types of products and services. A total of 38 semi-structured interviews were conducted with key stakeholders involved in these initiatives and analysed using thematic analysis to identify recurring patterns and configurations of actors and understand how these initiatives contribute to the diversification of coastal economies.

On the demand side, a choice experiment (a stated preference method used in the economic evaluation of goods and services) was conducted to study individuals' preferences for different types of recreational activities, which constitute the attributes of our experience. The chosen attributes are potential tourist activities related to fishing, aquaculture, and maritime heritage, as identified in the supply analysis. These include environmental education activities, cultural activities and heritage activities, as well as corporate tourism activities. Based on the identified attributes and their levels, we created fictitious scenarios which were presented to individuals. For each scenario, several leisure activities to enjoy during a stay on the coast were proposed. By analysing the choices made by respondents, we can see how the various activities proposed in the experiment are valued. Based on a survey of 336 people in Brittany, we first estimated a random logit parameter model to account for differences in respondents' preferences for various activities. We then estimated a latent class model to account for the heterogeneity of preferences between respondent groups and characterised these groups. The estimated results provide a willingness-to-pay figure for each identified activity.

Main results

The survey reveals a wide range of tourism activities related to the fisheries sector. These range from public services, such as museums and interpretation centres, to individual initiatives by fishermen, other sector professionals and associations. These initiatives aim to raise awareness of maritime issues. These activities are economically viable thanks to a combination of subsidies, market revenues (from sales of products and services) and voluntary work. However, they are highly sensitive to seasonality, weather conditions and visitors' purchasing power.

These initiatives are seen as a means of mediating between the public and coastal and marine environmental and heritage issues, as well as the professional maritime sectors. Know-how, landscapes, and heritage are brought into focus and valued, and local identity (including maritime heritage, language, and narratives) becomes a vital resource for differentiating and legitimising tourism products and services.

The maintenance and further development of these initiatives are constrained by chronic visibility issues among different audiences, limited organisational capacity (small teams and recruitment difficulties) and the increasing need for professionalisation and regulatory compliance. Overall, the study highlights a 'strained' tourism development regime in which opportunities for territorial diversification coexist with significant vulnerabilities. The long-term viability of this regime

appears to depend on consolidating actor networks, pooling resources (financial, material, and human), and stabilising and making public support more predictable.

In the context of studying the demand for tourism products and services, the relative value of willingness to pay (WTP) enables us to rank activities according to demand and identify those with low or no demand. The analysis shows a strong willingness to engage in sea-based environmental activities, whereas products that are more cultural or heritage-oriented mainly appeal to niche markets. On average, there is consistent demand for environmental education activities, with 'nature-focused sea excursions' being the most popular among all respondents. This activity is the most popular of all those offered. By contrast, demand for cultural and heritage activities, such as museum visits, maritime festivals and seafood cooking classes, is lower. For instance, fishing boat tours only appeal to some respondents. Business and know-how tourism activities also generate less interest overall. However, notable demand remains for 'seafood product tastings' and 'fish market tours', although demand for the latter is weaker. Only a small fraction of respondents requests the pescatourism activity. The three identified respondent segments (committed ecotourists, moderate explorers, and traditional tourists) can inform the design and marketing of fisheries-related tourism products.

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