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Knowledge transfer project:

Fishing tourism in Norway – as seen from the Netherlands

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Sea Fishing Tourism Netherlands

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1. Background

During Q1 2020, Innovation Norway in The Netherlands conducted a market research project targeting sea fishing tourism. The goal of the project was to gain more knowledge about the potential for Norway as a destination for sea fishing for travellers from The Netherlands. In addition to tour operators we also researched relevant websites, fishing magazines and organisations.

There is not much recent data available with regards to fishing in The Netherlands, and especially not about fishing tourism. The most recent data available is from 2017 and focuses on fishing in The Netherlands. Research done by Sportvisserij Nederland in 2017¹ has shown that more than 1,1 million Dutch went fishing at least once in The Netherlands, inland or at sea. The majority are men, 230,000 are women and 225,000 are younger than 15. The number of members of one of the 800 local fishing associations connected to Sportvisserij Nederland has increased, to 547,466 members.

Sea fishing is popular. In 2017 more than 530,000 people went sea fishing, of which 120,000 only fish at sea. 75 % Goes sea fishing only 1 to 5 times per year. 65.000 People go sea fishing monthly, weekly or even more often. Fishing for food at sea is still popular: 61% brings a catch back home sometimes. In comparison: with inland fishing this is only 10%.

Even though these numbers are from a few years ago and only focus on fishing in The Netherlands, it gives some background around the potential for fishing tourism and the good possibilities for Norway to position itself as a good fishing destination. Important to know is that fishing is a niche in The Netherlands and is not perceived the same as other outdoor activities as hiking and cycling.

¹ Sportvisserij Nederland: feiten en cijfers. Bron: <https://www.sportvisserij nederland.nl/over-ons/feiten-en-cijfers/>

2. Introduction and methodology

This knowledge transfer project was conducted by Innovation Norway's office in The Hague. The main objective of this report is to provide the reader with a better knowledge and understanding of the Dutch Sea fishing market, from a tour operator's perspective.

The project has been completed in two phases:

Phase 1 of this KTP report on sea fishing was conducted as online research, and we have mapped out the Dutch market in terms of sea fishing tourism. We have listed 9 tour operators, 6 media outlets and the official national organisation for sports fishing in The Netherlands

In Phase 2 we have conducted in-depth phone interviews with 5 tour operators who currently offer sea fishing trips to Norway and other destinations. The in-depth interviews were conducted in February 2020, and the results and analysis of the interviews are summarised and presented in this report.

3. Research part 1: online research

The initial mapping of relevant stakeholders in the Dutch market was performed through a screening of relevant websites. Through available information online, we answered a set of predefined questions within some relevant topics.

3.1 Tour operators

We identified 5 tour operators who offer a variety of fishing trips and tours in their programmes. We looked at their main products and target groups, together with how they design and package their products according to varying skill levels and prerequisites. We also researched what destinations they offer, if they have a focus on sustainability and safety issues, and whether they are of interest to Norwegian suppliers.

Tour operator	Website
Visreis.nl	www.visreis.nl
Cordes Travel	https://cordestravel.nl/
Visservice.nl	http://visservice.nl/
PS Visreizen	http://www.psvisreizen.nl/
Tight Lines	https://tightlines.nl/

3.2 Media

In The Netherlands, there are 5 fishing magazines that are potentially relevant in this research. Some focus only on sea fishing, but most of them focus on all types of fishing. Both in The Netherlands and abroad. The first four magazine are gathered in the same publishing house. Het Visblad is the member magazine from Sportvisserij Nederland.

Magazine	Website
Beet	https://beet.nl/
De Roofvis	https://www.deroofvis.nl/
Witvistotaal	https://www.witvistotaal.nl/
Zeehengelsport	https://www.zeehengelsport.nl/
Het Visblad	https://www.sportvisserij nederland.nl/het-visblad/

3.3 Websites

The magazines mentioned above all have a good website with a lot of information. These are the most complete websites with regards to fishing and fishing tourism. Other than these, there are no big fishing websites or portals. Most of the magazines also have Facebook groups and followers.

There is one popular forum for fishing in The Netherlands:

Forum	Website
Visserslatijn	https://www.visserslatijn.nl/forum/forum.php

3.4 Organisations

Sportvisserij Nederland is the official organisation for sports/leisure fishing in the Netherlands. Their aim is to ensure good fishing possibilities but also make sure guidelines are set and followed to take

care of the water, fish and environment. The organisation also gives out licenses for fishing in The Netherlands. Also, they have a membership magazine.

Organisation	Website
Sportvisserij Nederland	https://www.sportvisserijnederland.nl/

4. Research, part 2: in-depth interviews

In part two of the report, 5 tour operators have been participating in telephone interviews on their experiences relating to sea fishing. In addition, we interviewed two fishing magazines to give additional input: Beet Magazine and Zeehengelsport Magazine. Where relevant, their input is added.

4.1 Selection of products on offer

The tour operators that were interviewed all offer fishing trips only. Most of them offer individual trips and tailor-made trips. One of them offers standard all-in packages. Some also offer group trips, standard or tailor-made.

4.2 Focus markets

All interviewed businesses have The Netherlands as focus market. They might have some clients from the Dutch speaking part of Belgium, but do not focus on other markets.

4.3 Tour operator's sea fishing activities in Norway

All interviewed tour operators offer sea fishing trips to Norway. Both tailor-made products and standard programs, for individuals and groups. One of the tour operators only offers an all-inclusive package at two locations in Norway. Most packages consist of planning, accommodation, guide service and boat rental. Other services such as transfer and equipment rental can be added on request.

Most tour operators offer products all over Norway but say that most of their clients want to go to Northern Norway. One of them has mentioned that clients see Southern Norway as a destination for less experienced fishing tourists, and Northern Norway for those who have more experience. The tour operator only offering all-inclusive packages only sells trips to Vevang and Boknafjorden.

4.4 Presence in other markets

2 Of the tour operators only sell trips to Norway, the others sell trips to other countries as well, all across the world.

4.5 Demand for sea fishing experiences and other activities

Three tour operators say they see an increase in sea fishing tourism, one describes the market as steady and one operator sees a decrease. This operator thinks the increased competition due to online presence of other operators has caused this. His clients are mostly 50+ with medium to high income. The increase is mostly seen among groups of friends, going abroad for a fishing trip once a year.

One tour operator says their customers want to travel less. Ideally the accommodation should be within a 1-hour drive from the airport. What is mentioned by another operator, is that customers focus more on the quality of accommodations, boats and equipment than some years ago. Also, there is an increased demand for local guides. In the higher segment, customers want to arrange less by themselves, and prefer to be taken care of.

What was also mentioned, is that the way of booking and communicating has changed. The younger generation is booking online, instead of over the phone.

When it comes to other activities, all tour operators say other activities are not of interest for their customers. They come to Norway to go fishing. One tour operator says customers only demand other activities when the weather doesn't allow for going out at sea. In that case they would like to have the possibility to go fishing on a lake instead.

4.6 Accommodation and special needs

Self-catering cabins is the most popular type of accommodation. The cabins do not need to be very luxurious, but a certain modern standard is important. For groups of friends, the number of bedrooms is important as well. In addition, it is very important that the accommodation is close to the fishing location.

All tour operators mention good quality of the boats. This is key for accommodations and important to invest in.

Since most tour operators offer products based on self-catering, the distance to a grocery store is relevant as well. One tour operator mentioned that he would be very interested in offering more hotels to his customers, if there were more hotels close to the fishing areas. Now, it's mostly apartments and cabins in Norway.

4.7 Willingness to pay for services

In general, the tour operators report a medium to high willingness to pay for accommodation, planning/organising, and guiding. There's a high willingness to pay for boat rental. When it comes to buying fishing gear at a local store and local food, there is a low willingness to pay. These services are considered as too expensive for the relatively price-sensitive Dutch market. Also, people have low willingness to pay for sustainable solutions.

We see that services directly related to the main activity –fishing- are very important and therefore people are willing to pay for this. Same for accommodation. Other services are less important for the Dutch sea fishing tourist.

Interesting to note is that Dutch tourists are willing to pay for a guide, but with a maximum of €200,- per group and per day. Most Norwegian guides ask a higher fee and are considered too expensive.

We also asked if there are other elements fishing tourists would be willing to pay for. Answers were a service for grocery shopping or a taxi service to the grocery store, and late check-out and early check-in.

4.8 Local food and drinks

Four tour operators mentioned local food and drinks are not important to their customers. Mainly because this is considered too expensive. One tour operator mentioned it's quite important. This tour operator is focusing on more high-end customers. The tour operator offering all-in packages says they try to cook with the catch of the day where possible and on request.

4.9 Customers requests for sustainable solutions

All tour operators answered "no" to the question of whether their customers request sustainable solutions.

4.10 The importance of safety at sea

The operators all pointed out the importance of safety. The information starts small at their webpages and during the booking process. When arriving at the destination they all organize a security review for the coming days and planned activities. All mention 0% tolerance of consuming alcohol during fishing trips and the use of safety equipment (survival dress/life jackets) is a must.

One operator demands an industry standard for safety equipment and boats and they indicate that Norwegian suppliers/actors has good enough focus on safety.

4.11 Equipment

All operators indicated that most of their customers prefer to bring their own equipment. This is also due to the fact that prices for renting are quite high.

4.12 Typical length of stay

A **one-week** (seven nights) stay is what all operators indicate as the typical booking.

4.13 Type of travellers

It is mostly groups of friends that the tour operators indicate as their typical clients. The most common group size is between 4 and 8 travellers, although larger groups are seen as well, for example in a "festival" type of package that one of the operators has on offer. Apart from groups of friends, also families are a large segment.

4.14 Number of fishing holidays

It is only a very small group of customers that travels abroad for a fishing holiday more often than once a year. The largest segment goes on a fishing holiday once every year.

4.15 Bucket list destinations and destinations in Norway

Generally, Norway has a very good position on the tourist's bucket list. Several operators see that it is more often a type of fish/catch that a customer is after, rather than a particular destination. Norway has some of the more known species, cod for example, and a very rich ocean and is therefore seen as a go-to-country for many. Other Scandinavian countries are mentioned secondly and some operators see a demand for more exotic places like Gambia, Egypt or Panama.

The northern part of Norway (Trondheim and up) is regarded as the best place for fishing in Norway as there are both many different and relatively big fish. The south/west/fjord region is seen as the best spot to go to when one is not so experienced yet. A combination of fjord and north in one fishing holiday is regarded as too complicated, time consuming and expensive.

4.16 Bringing catch home

Answers to the question whether it is important to customers to bring their catch home, differed to a great extent. One operator indicated that it is only important to 30-40% of his customers, whereas another operator argued that if it would not be allowed to do so, that his customers would travel elsewhere. A third operator claimed that it has become less important because (flight luggage) rules in general are stricter nowadays. It seemed that all operators are well aware of the export/import rules.

4.17 Important success factors for developing sea fishing tourism

For a destination to develop fishing tourism it is first and foremost important to have a good fishing location: both in terms of quantity as well as quality. A rich ocean making it relatively easy to get a good catch is a selling point. Secondly, the type of boats are a determining factor for travellers to

choose their accommodation and/or destination. It is also important to maintain a certain level of comfort, quality and service at the accommodation.

4.18 Main challenges for Norway as a sea fishing destination

Norway has a very well developed fishing tourism industry and both the accommodation providers as well as their boats are of good quality. One of the concerns that were mentioned is the complexity of rules and regulations with regards to fishing. Not only in terms of export but also in terms of reporting catches. Generally, the tourism industry struggles with the high price level and this also goes for the fishing tourism. Lastly, the accessibility is something to continue improving: more frequent ferries to the islands could improve the customer's experience.

4.19 Incoming agents

Only one of the tour operators works extensively with incoming operators like Din Tur and/or Nordic Sea angling. The others (prefer to) book directly with the accommodation providers.

4.20 Channels used to reach main target groups

All operators in the survey mention both internet and social media as being important channels for reaching out to their main target groups. Apart from these channels, fairs, fishing magazines and word of mouth are mentioned. Interestingly, 3 out of 5 operators explained that they regularly organize presentations in fishing stores or outdoor shops in a cooperation to stimulate sales both for equipment as well as travel packages.

4.22 Cooperation with bloggers

The "influencers" that were mentioned, are mostly fishermen or journalists that report for magazines or fishing TV shows. None of the operators indicated that they had been working with them.

5. Conclusions and recommendations

Based on the survey and information we've gathered; the following can be concluded:

- Norway already has a relatively good position as sea fishing destination. People travel to Norway for the superb fishing possibilities, in both quantity and quality. Northern Norway is most well-known and popular for experienced fishing tourists.
- Most fishing tourists are groups of friends who go on a one-week fishing holiday once a year.
- For Dutch fishing tourists traveling abroad, fishing is the most important activity. Tourists are willing to pay for activities and services directly related to sea fishing, and are less willing to pay for activities or services not related to sea fishing, such as local food and other activities.
- Sustainability is not something Dutch tourists specifically ask for.
- A modern standard of accommodations is important, close to the fishing location.
- Quality and good specifications of the boats available are key.
- Tourists are willing to pay for a guide, but they often consider Norwegian guides as too expensive.
- Safety is important and considered a responsibility for all parties. The tour operators inform their clients about rules and guidelines before departure. An industry standard could be a good idea.
- One of the main challenges for Norway is the complexity in rules and regulations. Not only related to export, but also with regards to reporting catch for example.

- Norway is considered expensive by Dutch tourist. This is a general ongoing challenge we see on the Dutch market. We can't lower the price level, but it's important to deliver quality to the guests.
- Internet and social media are becoming more important for promotion and sales. But, all touroperators and magazines mention that print media, fairs, word of mouth are very important still. Also other places where potential clients are, such as fishing stores, are important.