

Nautilus Consultants

Hastings Fisheries Study:



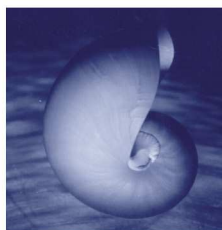
Final Report – Executive Summary

July 2004

Prepared for: Hastings Borough Council

Prepared by: Nautilus Consultants in association with Imagemakers

C:\HASTINGS\DATA\COMMITT\INTRANETOLD\CABINET\20041004\AGENDA\SE4KH YRFS.DOC



Nautilus Consultants
Natural resource economists

Executive Summary

1. Nautilus Consultants were commissioned by Hastings Borough Council (HBC) to undertake a Hastings Fishing Industry Study, conducted over three months of 2004. The study objectives were 'to promote the expansion and diversification of the fishing industry promoting more stable employment'. Work was conducted over 3 sequential phases to deliver appropriate, robust solutions for the sustainable future of the local fishing industry.

Phase One:

- Hastings Fishing Audit
- Opportunities and Threats

Phase Two:

- Options for the future
- A way forward

Phase Three:

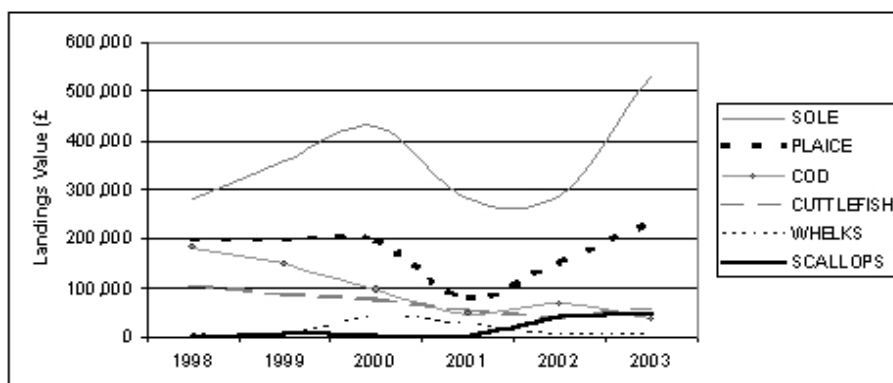
- A Business Plan for the Fish Market.

2. This report presents the results of phase one and two of this process. The business plan for the fish market, presented to the directors of Hastings Fish Market Enterprise Ltd, draws on the findings from the study and is consistent with its proposals, but is not included in this report.

Fishing Audit

3. The Hastings fleet is made up of vessels under 10m which are not required to submit individual landings information to Department for Environment, Food and Rural Affairs (DEFRA). There are 24 fishing boats at the Stade in Hastings of which 21 are active (12 netter/potters and 9 trawlers) with a few additional part-time boats at St.Leonards. The fleet has contracted in size from 30 active vessels ten years ago.
4. In total there are an estimated 65 full time equivalents directly dependent upon the fishing industry in Hastings with many more indirectly dependent on fishing. An examination of fleet earnings indicates that Hastings fishermen earn 20% below the average wage for workers in the county.
5. The last 6 years show a slight drop in total landings to around 500 tonnes in 2003 estimated to be worth £1,300,000 at first hand sales. The recovery in value of landings in the last couple of years is mainly due to the strength of the sole fishery, worth over 0.5 million and accounting for 51% of total value.
6. Plaice and sole are the main species landed by the fleet. Non-quota species such as cuttlefish and scallop fisheries are increasingly important components of the overall catch.

Fig. 1 Recent trends in value of landings at Hastings



7. The great majority of local landings (80 to 90%) are sold outside the region with most destined for the export market. Contrary to the public's perception, the bulk of fish sold in Hastings retail outlets is not from the Hastings fleet and current linkages are limited.
8. Volumes at the fish market have reduced and the resulting sales channels (one main fish merchant) mean that a full auction is no longer operating.
9. The current sales route for the majority of Hastings landings has some benefits to fishermen (convenience and reasonably secure regular payments) but it also clearly fails to retain a certain proportion of profits to maintain the industry infrastructure, in particular the fish market.

Tourism and Heritage on the Stade

10. Most of the buildings at the Stade and Rock-a-Nore Road have some link with fishing and/or the sea. The three main indoor tourist attractions along Rock-a-Nore road are the Fisherman's Museum, the Shipwreck Heritage centre and Underwater World (a commercial aquarium formerly a Sealife Centre). At present there is little planned interaction or shared interpretation between these attractions, but there is recognised co-dependence with each benefiting from the presence of the other attractions.
11. Examining visitor numbers to these 3 Stade attractions also shows the growing attraction of Underwater world and the reduced numbers visiting the Fishermen's museum. But it should be recognised that the Fishermen's Museum still had 140,000 visitors in 2003 – 3 times that of the Hastings Museum.
12. Recent tourism research found that 70% of visitors intend to visit some form of attraction...most focus on Hastings Pier and Flamingo Amusement park rather than those at the Stade.
13. The local fishing industry contributes far more as part of the overall Hastings tourism product. Tourism spend attributable to the presence of a fishing fleet is estimated at 2% of the £110million tourism spend in 2003 - almost double the £1.3million derived from landings. This estimate should be refined as part of any future visitor research.

Opportunities and Threats

14. Target fish stocks are currently in reasonable health, but tightening of the inshore management regime may limit the earning potential for the Hastings fleet.
15. Future fishing at Hastings will continue to be from a small (under 10m), beach- launched, fleet. Ecosystem shifts may result in new species to target and loss of more traditional fisheries, but a core of inshore vessels is expected to remain.
16. **Markets and marketing** - There is no reason to actively diversify into new fisheries at the expense of the high value fisheries dominating current landings. Market developments suggest an opportunity for a focus on the more distinctive local products and develop Hastings' reputation for quality primefish. The Stade provides the potential for joint marketing, local food initiatives with supermarkets, farmer's markets and certification. These must be done in connection with quality initiatives and improvements to the visitor experience.
17. **MSC Certification** - Fishermen and merchants cannot expect significant price premiums even for Marine Stewardship Council (MSC)-certified Hastings fish without it being supported by quality and marketing initiatives.
18. **Quality** – Opportunities include improved handling and icing practices at sea and ashore (linked to marketing improvements to ensure quality is rewarded), market codes of practice.
19. **Recruitment, skills and training** – The lack of recruitment into the industry is an immediate problem. The scale of the Hastings fleet cannot justify a dedicated training scheme and the existing fishermen will soon have

the mandatory training. Improved recruitment levels is essential to fleet sustainability. Provide clear access to the help that is available (national network of free training and modern apprenticeship scheme) as well as provision of a development stage, mentoring and promotion.

20. **Educational links** – The fishing industry is a rich vein of material for educational purposes relating to heritage, biology, economics, business etc. Education & interpretation facilities are needed for the Stade. There are a number of funding bids and plans for such facilities, but none confirmed. A Stade Education Officer should be put in post to develop interpretive material and links with the education sector. This developmental role should not be delayed by the current lack of appropriate facilities.
21. **Tourism** - The greatest socio-economic opportunity lies in improving the visitor experience associated with the Hastings fishing fleet. The Stade is the most appropriate scale for planning developments not individual attractions. Projects and initiatives need to be carefully structured in order to safeguard the many positives associated with the Stade and avoid operational conflict with the working fishing industry. A plan is needed for developments for developing a 'sense of arrival', clearer interpretation and better management of visitor traffic.
22. **Stade Management** – Many issues raised in consultation relate to the day-to-day management and general upkeep of the Stade. Most are addressed in the existing Stade Action Plan produced by the Stade Partnership. As a stakeholder committee, the Stade Partnership does not have the resources to implement actions. Hastings Borough Council should work with the Stade Partnership to implement the action plan.
23. The Hastings fleet is unlikely to expand, but it should be sustained through marketing and recruitment assistance. It would benefit from an improved visitor experience along with the other Stade businesses.

Options for the Future – The Way Forward

24. The relevant authorities have clearly recognised the need for regeneration of the area, but so far these have not resulted in dramatic improvements on the ground. But the ability to make significant improvements requires an injection of funding. This report recommends initiating the 3 major projects for fishing and the Stade rather than an additional strategy.
25. The 3 project heads proposed are '**Fishing and Seafood**' part-funded by Financial Instrument for Fisheries Guidance (FIFG); **Tourism** and **Education** to be part-funded by an Interreg bid linking Hastings with French port(s) in similar circumstances such as Fecamp, Port-en-Bessin, Dieppe or Lille. Specific aspects within the Tourism and Education projects are eligible for additional national funding from Heritage Lottery Fund, Museums Council and Learning Skills Council.
26. The **Fishing and Seafood Project** would employ a full-time Fish Market Manager who would also target improved quality, marketing and recruitment.
27. The **Tourism Project** would aim to 'develop a sense of arrival' at the Stade through public art, themed paving and street furniture and develop 'the story of fishing' through better and innovative interpretation. A part-time project manager would oversee these developments either as part of HBC's Regeneration Unit or within Sea Space's regeneration plans as part of the Seafront Strategy (expected by the end of 2004).
28. The **Education Project** would employ a full-time Stade Education Officer to develop an education programme co-ordinating school visits and the archiving of material by Museum staff.
29. All of the projects would benefit from a visitor centre providing space for interpretation and promotion. A summary of the proposed projects and tasks are presented in Table 1, 'The Way Forward', overleaf.
30. Without HBC ensuring these projects are taken forward, the Stade remains an area with great potential and not the important heritage site that Hastings can be proud of.

Table 1. The Way Forward*

Project & Objective	Tasks	Responsibilities & funding	Links to strategies & initiatives	Next step & timing
<p>Fishing and Seafood</p> <p>“To enhance the sustainability of the Hastings Fishing Industry”</p>	<p>Appoint Fish Market Manager to:</p> <p>A. Marketing</p> <p><i>Priority 1</i></p> <ul style="list-style-type: none"> • Establish quality initiative (training, handling, code of practice) • Link to local food initiatives • Joint marketing initiative for Stade Seafood businesses • Increase revenue through Fishermen’s Shop • Investigate establishment of electronic market network <p><i>Priority 2</i></p> <ul style="list-style-type: none"> • MSC Certification and promotion • Development of new markets <p>B. Recruitment, Skills and Training</p> <ul style="list-style-type: none"> • Link with Southern Fish Industry Training Association • Provide and promote point of contact & show career path • Establish a mentoring scheme • Establish a ‘development stade’ for new entrants • Modern Apprenticeship and sponsorship programme 	<p>HFME employ the Fish Market Manager with FIGG funding and assistance from HBC.</p> <p>Some aspects (additional marketing, ongoing training, promotion) could form part of overarching Interreg bid)</p>	<ol style="list-style-type: none"> 1. Seafish quality awards (national) 2. Southern fish Industry Training Association (regional) 3. SEEDA Healthy Lifestyle clusters (regional) 4. Sussex Farmers Markets 	<p>2 year project with one full time employee (fish Market Manager)</p> <p>Preparation of FIGG bid by September</p> <p>Continuation of fish Market Manager after 2 years dependent upon performance and funded by HFME with future marketing contributions from Stade businesses.</p>
<p>Tourism</p> <p>“To increase revenue to Stade attractions and businesses through an improved visitor experience”</p>	<ol style="list-style-type: none"> 1. Develop a sense of arrival <ul style="list-style-type: none"> • Creating a themed entrance to The Stade (public art) • Changing the existing paving along Rock-a-nore Road to create a sense of arrival • Developing a relaxed ‘pedestrian’ feel (traffic calming and/or separation of car/pedestrian areas) • Installing high quality, themed street furnishing and public art 2. Develop the story of fishing <ul style="list-style-type: none"> • Co-ordinate the fishing story and fill in the gaps (interpretation) • Identify places where the story of fishing and the fishing community can be related (links with Old Town) • Rationalise visitor experience to raise individual profile of each attraction, allowing tailored merchandising & more spend/head 	<p>HBC to develop Interreg bid with assistance from Sea Space Tourism Project (Sea Space to conduct tourism and education options analysis as first part of HLF bid)</p>	<ol style="list-style-type: none"> 1. HBC’s Making Waves, Public Art strategies & Sea Space’s urban renaissance objective 2. Seafront Strategy 3. Link with successful existing bids and plans for visitor centres 	<p>Tourism options analysis by Sea Space- ASAP</p> <p>Preparation of Interreg bid July-September for October submission. Preparation of HLF bid August onwards.</p>

Project & Objective	Tasks	Responsibilities & funding	Links to strategies & initiatives	Next step & timing
Tourism (cont.)	<p>2. Develop the story of fishing (cont.)</p> <ul style="list-style-type: none"> • Improve connection with the sea – boat trips, recreational fishing, pedestrian access to breakwater <p>3. Establish a new visitor centre to:</p> <ul style="list-style-type: none"> • Provide interpretation on the social heritage of fishing, the industry today and its future • Give information to visitors about things to do on The Stade • Develop & promote a programme of activities for visitors to The Stade that will include the established attractions and events • Be a base for educational events and activities • Set up and host a dedicated web site for The Stade • Co-ordinate activities between The Stade attractions and fishermen on the beach • Promote local produce 			<p>(cont.) Timing & staff dependent upon Stade Interpretation and Education Plan.</p> <p>Part-time project manager role anticipated for duration of project.</p>
<p>Education</p> <p>“To improve information and educational services to visitors and the local community”</p>	<p>Establish a team (including existing Museum staff and led by a full-time education officer) to co-ordinate archiving, educational resources and activities.</p> <ul style="list-style-type: none"> • Audit existing resources • Develop increased capacity in archiving of material (through additional training) and register for national access • Develop an education programme for Key Stages 2, 3 and 4 and Higher Education and SVQs and NVQs in the fishing industry • Co-ordinate school visits • Establish a range of educational resources and promote their availability eg through links to ‘The Stade’ web-site and to Seafish educational resources 	<p>HBC to develop Interreg bid with assistance from Sea Space Learning Skills Manager.</p>	<ol style="list-style-type: none"> 1. Learning and Skills Council Local Strategic Plan. 2. Sea Space Education plan 3. Seafish Industry Authority educational resources 4. East Sussex County Council Education Development Plan 2002-2007. Strategic Partnership and Community Learning 	<p>Preparation of Interreg bid July-September for October submission.</p> <p>Anticipate 2 year project with one full-time Education Officer and a number of specific funded tasks for museum staff. Education Officer role sustained through educational visits revenue and/or further public funding</p>

***Timing is indicative and dependent upon Hastings Borough Council taking forward these projects**