The value to the Welsh economy of angling on inland fisheries in Wales

1. Introduction

This review draws together statistics and other information for angling in England and Wales and makes particular reference to data relevant to the value of freshwater angling on Welsh inland waters. Up-to-date statistics are put into the context of the Wales Fisheries Strategy, 2008 and the Wales Fisheries Strategy Implementation Plan, 2009. Concerns relevant to the publication in 2014 of WAG's Green Paper on Access and Outdoor Recreation Legislation are addressed.

2. Background: angling in the UK

The Environment Agency's report *"Fishing for the future - Angling in 2015: Our plan to increase participation"*, was published in March 2006. It stated that: "2.6 million (6%) of the 43 million people aged over 12 in England and Wales went fishing in freshwaters in the last year (2005) and 1.5 million people fished just in the sea. With over 4 million people fishing last year, it is probably the nation's favourite outdoor participation sport. Even more people fish less frequently, with 20% (8.3 million) having been freshwater fishing in the last 10 years."

The Environment Agency's *Economic evaluation of inland fisheries,* published in December 2007, found that: "Freshwater Angler gross expenditure across the whole of England and Wales was £1.18 billion. Household income of £980 million and 37,386 jobs were generated across England and Wales." A DEFRA report published in 2004 reported that "the direct spend by recreational sea anglers in England and Wales amounted to £538 million and the total worth of the sector could be some £1.3 billion".

Based upon the above data, now over nine years old, it could quite comfortably have been claimed at the time that angling was worth at least £2.5 billion to England and Wales and more than £3 billion to the UK as a whole.

In November 2013, DEFRA published more recent data for sea angling, *"A survey of recreational sea angling activity and economic value in England: Sea Angling 2012"* but no comparable, up to date economic data are available for freshwater angling, neither for England nor, more significantly at this time, for Wales.

3. Angling on inland fisheries in Wales

3.1. Economic evaluation of inland fisheries

The Environment Agency's *Economic evaluation of inland fisheries, 2007,* was based on a 2005 survey on the economic activity generated by angling on inland waters in Wales, and regions of England. This report provided the foundation for another, the *Economic evaluation of inland fisheries: Managers' report from science project SC050026/SR2,* published in 2009, which contains details on separate UK regions, including one on Wales.

These data from 2005, are the most recent of this sort to be published by the EA / NRW and, as such, also represent the most recent, comprehensive analysis available to governments in England and Wales. In its 2009 report, the EA noted that "Around one million anglers were licensed to fish in England and Wales".

For Wales alone in 2005, it reported that "There were 47,186 license holders resident in Wales, who generated 1.3 million days, most of the angling activity; nonetheless, 0.5 million days were fished by visitors to the area. Anglers came to Wales from every region in England, especially from the adjacent North-west and West Midlands".

It should be noted that this survey by the EA only covered expenditure directly attributable to angling, and so did not include expenditure by partners or family who accompanied anglers visiting Wales. With this major caveat, the report concluded that "Around 1,500 Welsh jobs and £32 million in household income are supported by angling on inland fisheries in Wales. About 40 percent of this derives from expenditure by visitors", and that "There were 1.7 million days fished on inland fisheries in Wales by license holders, generating £74 million of expenditure in the principality by anglers. Although game fishing (salmon or trout) is far more important in Wales than in any English region, half of the days fished were for coarse fish. Expenditure per day on game fishing is greater, on average, than on coarse fishing, so two-thirds of this economic activity is derived from game fishing".

Since 2005, inflation has increased by 26%, so expenditure in 2005, excluding that by partners or family who accompanied anglers, would now equate to over £93 million (2013).

3.2. Angling participation and EA licensing since 2005

3.2.1. Licensing in Wales

As there are no accurate up-to-date data on the contribution of freshwater angling to the Welsh economy, how have licence numbers and sales changed since 2005 and what can be learnt from this?

As well as paying for their fishing, through club memberships and by the purchase of day tickets or payment direct to riparian owners, possession of an EA Rod Licence is a legal requirement for anglers fishing in freshwater in England and Wales. The average cost of licences has increased by about 24% since 2005, somewhat less than the increase in inflation. In looking at licensing data for Wales, it should also be recognised that from 2008, boundary changes for EA Wales meant that the national boundary subsequently determined what was Wales, rather than the previous definition of EA Wales being based upon river catchments. Consequently, from 2008, parts of the Wye and Dee catchments became part of the EA, and parts of the Severn catchment became part of EA Wales, now NRW.

The number of EA licences, and income derived from sales (Tables 1 and 2), has fluctuated over the years since the EA's survey on the Economic Value of Inland Fisheries in 2005. The data in these tables illustrate a number of points and provide unambiguous evidence of an increase in licensed freshwater angling since 2005. The impact of the weather, both favourable and unfavourable to angling, particularly in rivers, and of the recession, is also clear:

a. Across England and Wales, the number of freshwater fishing licences increased from under 1.24 million in 2004/5 to over 1.46 million between 2009 and 2012, an increase of nearly 19%

b. licence sales increased from just under £19 million in 2004/5 to over £25 million between 2009 and 2012, an increase of 34%. Given the increase in numbers of licences purchased, this increase in sales is an increase in real terms, in excess of inflation over this period

c. before the changes in EA Wales borders in 2008, licence numbers in Wales increased from just under 65,000 in 2004/5 to over 78,000 in 2007/8, an increase of over 20%

d. after the changes in EA borders in 2008, licence numbers in Wales increased again in 2009/10 to over 75,000, an increase of almost 8% compared with the previous year. Generally favourable UK weather conditions that year also led to a significant increase in license numbers in all English regions. By way of contrast and as a result of the unusually wet year, licence numbers declined in 2012/13 in both England and Wales

e. sales to anglers in Wales of EA licences, used for the conservation and development of Wales's rivers and waterways, increased from almost £1.1 million in 2004/5 to just under 1.4 million in 2007-8, an increase of over 26%

f. after the Welsh border changes in 2008, sales understandably declined somewhat but increased yet again in 2009/10, to £1.48 million. This represented an increase of 11% on the previous year, *and an increase of 35% since 2004/5, way in excess of the 13% increase in inflation over that period*

g. reduced sales in the last few years are believed to be related to the effects of the recession and particularly to the weather in 2012/13. The EA will be developing local and national initiatives to promote angling participation, rod licence sales and compliance for 2014.

3.2.2. Licensing in England and the economic importance of anglers visiting Wales

As reported in the EA's Economic Evaluation of Inland Fisheries, "half a million days were fished by visitors to Wales, and anglers visited Wales from every region of England, especially those from the adjacent North-west and West Midlands". It is also worth noting that, in this survey, grayling were classified as a coarse fish, even though, like salmon and trout, it is a member of the "salmon family". It is frequently fished for in much the same way as for trout, and is a significant target species for resident and visiting anglers on certain Welsh rivers, principally in the catchments of the Wye, Dee, Severn and Taff, the most accessible catchments for visiting English anglers.

Ignoring the weather-related downturn in licence sales in 2012/13, it can be clearly seen from Table 1 that the number of licences from the North-west and Midlands increased from nearly 366,000 in 2004/5 to over 460,000 in 2011/12, an increase of nearly 26%, about the same proportion as for increased licence sales for the whole of England. Given the attraction of Welsh fisheries, there is no doubt that this increase would have been reflected in a proportionate increase in anglers visiting Wales from these two key regions.

From all of the above, it is clear that EA licence sales and revenue in Wales increased significantly between 2004/5 and 2009/10. Since then, as with other economic indicators, the impact of the recession has probably affected Welsh sales and, in 2012/13, the bad weather. Visiting English anglers are very important to the Welsh economy, and licence sales in England, in particular in the key adjacent Midlands and the North-west regions, have increased significantly since 2004/5.

3.3. The Wales Fisheries Strategy, 2008, and Implementation Plan, 2009

The Wales Fisheries Strategy (WFS), in discussing Recreational Freshwater Angling, quoted the most recent EA licensing statistics, from the 2006/7 season, and noted that "numbers of licences had increased annually as a result of campaigns such as *Go Fishing*" and that "a huge number of visits are made to Wales by anglers from elsewhere each year, with in excess of 700,000 angling visits in 2004/5 alone. These visiting anglers provided a benefit to the wider economy, not just angling based businesses (bait and equipment shops), but also pubs, restaurants and local amenities".

The review went on to say that **"For recreational freshwater anglers,** the value of tourism angling to Wales is now estimated **to be well over £100m.** The results of the economic success of Fishing Wales have shown that the marketing work generates £80 for Wales for every £1 spent on marketing **– more than other tourism-related activities".**

The 2008 Strategy Review also stated that "The issue of economic headroom, or scope for growth, is a key cross-sector challenge for sustainable fisheries development in Wales. Recent projects have started to take advantage of the economic headroom for inland fisheries with projects such as 'Fishing Wales', the 'Sustainable Fisheries Programme' and community-led projects such as those by the Wye and Usk Foundation. These initiatives aim to maintain and enhance the social and economic importance and value of fisheries to the benefit of local communities (both rural and urban) within Wales and to the general public as a whole".

The Wales Fisheries Implementation Plan, 2009, pointed to the "Potential to promote many smaller rivers and feeder streams that are currently under-utilised as low-cost/low-volume 'wilderness brown trout fisheries'. Significantly it also acknowledged that "Coarse fisheries (including fishing for grayling) make a major contribution to the economic value of Wales' inland fisheries and that there is *no scope to increase the distribution of coarse fisheries on other Welsh rivers outside their present range"*. It went on to say that "The overall objective for the inland fisheries sector is for more wild fish in more waters *bringing more benefit to Wales*" with "Informed stakeholders working together and in partnership with others to *produce and maintain healthy fisheries for future generations"*.

Increased angling participation will always be reflected in increased expenditure, so how did freshwater angling participation change since the WFS estimated its worth in 2008 at "well over £100 million to the Welsh economy"?

3.4. Angling participation since the publication of the Wales Fisheries Strategy

Four different examples are noted below:

a. Licensing statistics have shown a clear increase in angling participation: 2007/8 EA Wales licences sales and revenues increased by over 9% compared with 2006/7 and, following EA Wales boundary changes, licence sales again increased by nearly 8% to over 75,000 in 2009/10, and revenues by 11% compared with the previous year, generating significant income for EA Wales (£1.48 million) for the conservation and development of Wales's rivers and waterways. Licence sales have since declined and this concern is addressed later.

b. In 2012, Fishing Wales reaffirmed the importance of angling tourism in general, with 74% of visitors canvassed confirming that they fished whilst in Wales, and 45% stating that this had been the main purpose of their visit. As discussed earlier, visiting English anglers generate significant revenue for Wales on Welsh rivers, and statistics since 2006/7 (Table 1) showed a 17% increase in English licence sales and a 20% increase in sales in the Midlands and the North-west regions, key visitors to Welsh inland waters.

c. The Wye and Usk Foundation has put in place Voluntary Access Agreements, and has continued to deliver many of the objectives set out in the WFS, 2008, through the restoration of habitat, water quality and fisheries in the Wye and Usk catchments. It has accessed significant sums of money to remedy problems such as habitat degradation, poor water quality and diffuse pollution, and barriers to fish migration. It has also significantly increased the availability and accessibility of fishing to visiting anglers, both on the main rivers but also, in keeping with the WFS, on many smaller rivers and feeder streams. From just over 1,500 day tickets sold in 2004, to over 6,500 day tickets sold in 2008, over 11,000 day tickets were sold in 2013 which, together with other fishing revenue, generated sales of over £263,000, with the added benefit to rural economies that such visitors bring.

d. As just one example of clubs in Wales, the Llangollen Maelor Angling Club owns or rents 10.5 miles of fishing on the Welsh Dee, has 400 members, both local and from elsewhere in the UK, *and sells on average 1,000 day tickets per annum to visitors*, and all of these anglers spend money in the local economy.

3.5. The future: sustaining the quality of Welsh fisheries and income to the Welsh economy

Nothing can be done to control the impact of bad weather on angling participation anywhere but, given current positive UK economic trends, there is every prospect of recovery from the negative impact of the recession on licence sales in Wales and England. As with all sales and marketing, *as long as the quality of the product being offered to anglers in Wales is as high as it is now*, those interested in delivering the WFS, and the maximum economic potential from Welsh fisheries, should be confident that recovery will happen. However, whether such a recovery will be sustainable is very doubtful, should proposed changes in access to rivers become enshrined in law. The risk of undermining this important industry, and the important economic contribution that recreational angling makes to some of Wales's most remote and deprived communities, should not be underestimated, nor the benefits derived from the work of anglers, clubs and associations taken for granted.

As the economy recovers, and in keeping with WFS objectives, the immediate and long term priority should be to promote angling participation and rod licence sales, to ensure that the quality of Welsh angling is not undermined, and to encourage visitors to continue to enjoy the wonderful fishing that is *currently offered,* with all of the proven benefits that accrue to the Welsh economy. The EA will be developing local and national initiatives to promote angling participation, rod licence sales and compliance for 2014. No doubt NRW will address the same issues but, who, in keeping with the Wales Recreational Freshwater Fisheries Strategy, provides the fishing and maintains and develops sustainable fisheries, in order to meet the objectives and generate the benefits set out in this strategy?

With the support of angling promotion by the EA, NRW and Fishing Wales, the answer is anglers, angling clubs and associations with leases of or property on Welsh rivers, riparian owners, and larger organisations, such as the Wye and Usk Foundation. As the EA's *Angling in 2015: Our plan to increase participation"* stated, "People from a very wide range of socio-economic groups go fishing" and nowhere is this more true, both now and historically, than in Wales with its long tradition of vibrant clubs and associations (see the SACC website supporters page). They provide the fishing and their anglers observe and monitor invertebrate populations, maintain habitat, control invasive weeds, seek to develop and sustain wild fish populations, provide tuition and guidance, and actively participate in and contribute to the EA's Local Fisheries Groups. To quote the WFS, they are "Informed stakeholders working together and in partnership with others to produce and maintain healthy fisheries for future generations".

Unless future access to rivers is based upon Voluntary Access Agreements (and angling interests are keen to embrace these), unrestricted canoe access will lead to loss in patronage of and income from fisheries, and reduction in their value. As the quality of the fishing experience declines, so club memberships and day ticket sales will be compromised and, with that loss in revenue, the renting of fisheries will be threatened.

VAAs give all users a clear set of rules, offer flexibility, acknowledge local assets and conditions, including environmental constraints such as limitations in the size of rivers, Special Areas of Conservation, wildlife and habitat, and are in keeping with the Environment Agency's view that "the wider application and development of voluntary arrangements is the most appropriate way forward to secure greater opportunities for sustainable and responsible access to inland waters."

If unrestricted access becomes the norm, the net result will be that the Wales Fisheries Strategy and Implementation Plan for Recreational Freshwater Angling will not be sustainable, and the growth and benefits that they sought to generate for the Welsh economy will not be delivered .

SACC, Jan 2014

Table 1. National Rod Fishing Licences - number and value (£) for years ending 31 March 2005-13 (EA fisheries statistics for England and Wales)

	Region	Wales	Midlands	North-west	South-west	North-east	Anglian	Thames	Southern	Unknown	Total
2012-13	**Licences**	50,865	249,217	154,336	93,004	176,251	216,621	224,264	124,750	15,609	**1,304,917**
	Value										£ 23,097,345
2011-12	**Licences**	63,918	287,941	172,256	104,404	197,619	239,781	254,063	139,066	8,502	**1,467,550**
	Value										£ 25,172,418
2010-11	**Licences**	65,658	286,016	172,970	104,972	197,105	236,886	255,291	136,656	8,452	**1,464,006**
	Value										£ 25,575,029
2009-10	**Licences**	75,128	282,968	163,979	103,907	199,106	238,706	255,943	137,110	9,099	**1,465,946**
	Value										£ 25,381,542
2008-9	**Licences**	69,762	262,469	151,750	96,529	179,983	217,749	233,836	125,725	6,669	**1,344,472**
	Value										£ 22,625,736
2007-8	**Licences**	78,102	257,647	140,816	98,026	189,781	215,247	234,104	126,745	11,933	**1,352,400**
	Value										£ 21,677,902
2006-7	**Licences**	71,122	252,958	131,347	91,919	179,900	198,487	218,728	119,235	17,842	**1,281,537**
	Value										£ 20,504,768
2005-6	**Licences**	70,947	254,039	129,545	89,425	179,035	199,282	216,830	118,106	39,635	**1,296,865**
	Value										£ 20,292,629
2004-5	**Licences**	64,817	241,224	124,515	82,663	167,696	188,987	204,194	111,027	50,867	**1,235,989**
	Value										£ 18,905,940

Table 2. National Rod Fishing Licences - number and value (£) E A Wales for years ending 31 March 2005-2013

		2004-5	2005-6	2006-7	2007-8	2008-9	2009-10	2010-11	2011-12	2012-13
Trout and coarse fish	**Licences**	57,999	63,441	64,139	70,699	62,194	67,313	58,536	56,722	44,043
	Value	£ 796,562	£ 897,306	£ 936,045	£ 1,027,081	£ 952,666	£ 1,082,591	£ 934,837	£ 893,615	£ 695,450
Salmon and sea trout	**Licences**	6,817	7,505	6,982	7,402	7,568	7,815	7,122	7,196	6,822
	Value	£ 301,504	£ 351,004	£ 337,202	£ 362,554	£ 383,089	£ 402,288	£ 358,944	£ 362,732	£ 351,999
All licences	**Licences**	64,817	70,947	71,122	78,102	69,762	75,128	65,658	63,918	50,865
	Value	£ 1,098,066	£ 1,248,310	£ 1,273,247	£ 1,389,635	£ 1,335,755	£ 1,484,879	£ 1,293,781	£ 1,256,347	£ 1,047,449