Tourism Development International

# Socio-Economic Study of Recreational Angling in Ireland

July 2013

Iascach Intíre Éireann
Inland Fisheries Ireland

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Tourism Development International

# Final Report

## Socio-Economic Study of Recreational Angling in Ireland

July 2013

**Prepared on behalf of**

# Inland Fisheries Ireland

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Inland Fisheries Ireland

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# EXECUTIVE SUMMARY

## SCOPE OF STUDY

- This research project has been undertaken by Tourism Development International (TDI) on behalf of Inland Fisheries Ireland (IFI). IFI is the state agency with responsibility for the conservation, protection, development and promotion of inland fisheries and sea angling resources in Ireland.
- There has been an absence of recent in-depth research on recreational angling in Ireland. This report seeks to address this deficit by providing information which will help underpin effective strategic planning and decision making in respect of angling product development and marketing. The report will also estimate an economic value of recreational angling.
- The study has involved a comprehensive programme of research comprising three primary surveys augmented by desk research analysis.

## VOLUME, VALUE AND ECONOMIC IMPACT OF RECREATIONAL ANGLING

- Up to 406,000 individuals participated in recreational angling in Ireland in 2012.
- Total direct expenditure on recreational angling in Ireland in 2012 is estimated to be of the order of €555 million of which €121 million was generated by out-of-state anglers.
- When indirect and induced impacts are taken into account, the overall economic impact of recreational angling in Ireland is therefore estimated to be approximately €755 million.
- Total tourist angling expenditure can be estimated at approximately €280 million.
- Recreational angling can be estimated to support approximately 10,000 jobs (based on 36 jobs per €million in tourist expenditure).
- The aggregate non-market value of the fishing resource to the Irish public is €58 million per annum. This is the value that the public place on avoiding the deterioration in the quality of Ireland’s natural fish stocks and angling experience.
- Notwithstanding the very significant impact in economic terms, there is evidence of a decline in recreational angling participation levels over the past decade.

## ANGLING CATEGORY

- Sea angling, along with salmon and brown trout angling are the most popular categories where domestic anglers are concerned.

**Domestic Recreational Anglers – Volume Estimates by Category (2012)**

| | Anglers on Day Fishing Trips | Anglers on Overnight Fishing Trips |
|---|---|---|
| Salmon or Sea Trout | 69,000 | 22,000 |
| Sea Trout Only | 22,000 | 10,000 |
| Brown Trout | 67,000 | 14,000 |
| Pike | 62,000 | 15,000 |
| Coarse (Excl Pike) | 42,000 | 17,000 |
| Bass | 33,000 | 11,000 |
| Sea Fish (Excl Bass) | 71,000 | 22,000 |

Source: Millward Browne Lansdowne/Household Survey

- Where overseas anglers are concerned, salmon, bass and sea angling are particularly popular. Most Northern Ireland anglers have a clear preference for game angling.

## PROFILE OF RECREATIONAL ANGLERS

- Of the 406,000 individuals who took part in recreational angling in 2012, 252,000 were Irish adults. Domestic anglers therefore account for over half (62%) of recreational anglers in Ireland. Northern Ireland also represents an important source with Northern Irish anglers accounting for one in ten (10%) recreational anglers (41,000 visits).

- 28% of all recreational anglers (113,000) are from overseas markets. In 2011 (the most recent year for which statistics are available) Fáilte Ireland research indicates that 48,000 British visitors to Ireland engaged in recreational angling while 45,000 individuals visiting from mainland Europe participated in the sport. (N.B.: It should be noted that the market profile of overseas anglers has been subject to fluctuation in recent years).

- The age profile of recreational anglers is an older one with almost half (49%) falling into the 35-54 age cohort and 37% of anglers aged 55 years or older.

- Domestic recreational anglers have a somewhat younger age profile than overseas anglers. With over half (52%) aged 55 years or older, British anglers are noticeably older than their counterparts from other countries.

- Where social classification is concerned, 62% of all recreational anglers are from ABC1 socio-economic backgrounds. Anglers from ABC1 backgrounds comprise 70% of British anglers and 83% of those from mainland Europe.

- Less than one third (29%) of anglers had travelled alone. Four in ten (39%) recreational anglers interviewed had travelled with either family or friends.

## RECREATIONAL ANGLING PARTICIPATION PATTERNS

- Domestic anglers participating in day fishing trips took an average of 13.6 day angling trips.

- One in four (22%) domestic anglers took an overnight fishing trip. For those who made overnight trips, the mean number of trips was 5.25.

- Overseas recreational anglers made an average of two angling trips (1.97) to Ireland in the past 12 months. A higher than average number of trips to Ireland in the past year was recorded in respect of European anglers (2.35 trips).

- Overseas anglers have proven to be very loyal to Ireland and to specific fisheries. In most instances, overseas recreational anglers returned to the same fishery. This pattern was evident across anglers from all overseas markets and in respect of all categories of anglers.

## MOTIVATIONS AND ATTITUDES OF RECREATIONAL ANGLERS

- Respondents in the *Survey of Recreational Anglers* were asked to rate various aspects of the Irish fishing product on a five point scale from 5 (very good) to 1 (very poor). Using this five point scale and aggregating all the responses, mean scores have been prepared in respect of each product attribute and these are shown in the Figure below.

  The higher the mean score the higher the rating given to a particular aspect of the fishing product. (Note: the 'quality of accommodation' relates to the general quality and not necessary accommodation specific to anglers needs).

- Respondents in the *Survey of Recreational Anglers* identified outstanding scenery and friendliness/hospitality of the Irish people as the most appealing aspects of Ireland as a destination for recreational angling.

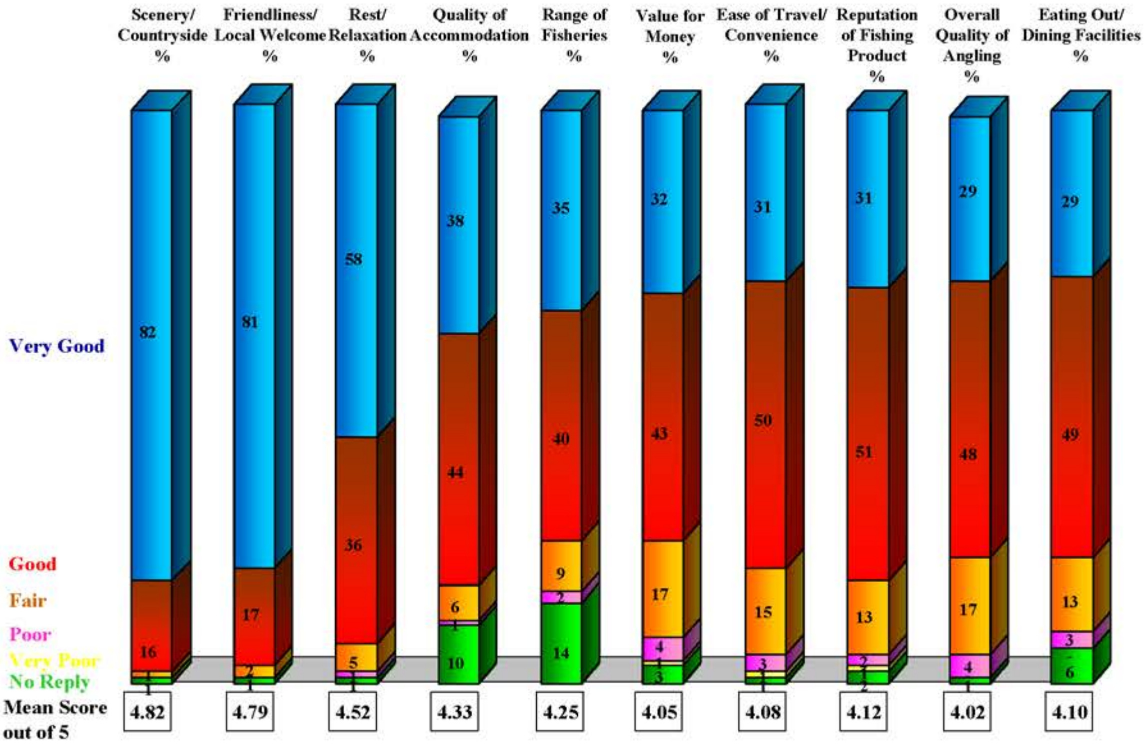
- Significant proportions of anglers also rated the Irish angling product highly in terms of its restful/relaxed ambience (mentioned as either 'good' or 'very good' by 94% of respondents), the quality of accommodation (82%) and the reputation of the angling product (82%).

- The friendliness of Irish people is an attribute that is particularly appreciated by British and European anglers. Scenery is also important to Europeans as is the variety of species available in Ireland.

- Over three quarters (77%) of anglers considered the overall quality of the Irish angling product to be 'very good' or 'good'. Amongst those not satisfied with the overall quality, a perceived general decline in fish stocks was cited as the main reason for this lack of satisfaction. The improvement in water quality is cited as the most positive development in angling in Ireland in recent years. The abolition of drift netting is also seen as a positive development.

- Over two thirds (67%) rated the quality of angling information available as good and very good. Over half (53%) rated fish stocks as good or very good. Just under a third (31%) rated biosecurity as good or very good, however it should be noted that 27% of respondents didn't give a reply to this question.

**Rating of Aspects of Fishing Product (Part 1)**




- The various costs associated with participating in angling (permits, tackle, bait etc.), illegal fishing and bad weather are the least appealing aspects of recreational angling in Ireland. Cost was a particular issue where British anglers are concerned. The bad weather and perception of the decline of certain fish stocks were cited as the least appealing aspects for Europeans (albeit a minority of 17% and 13% respectively).

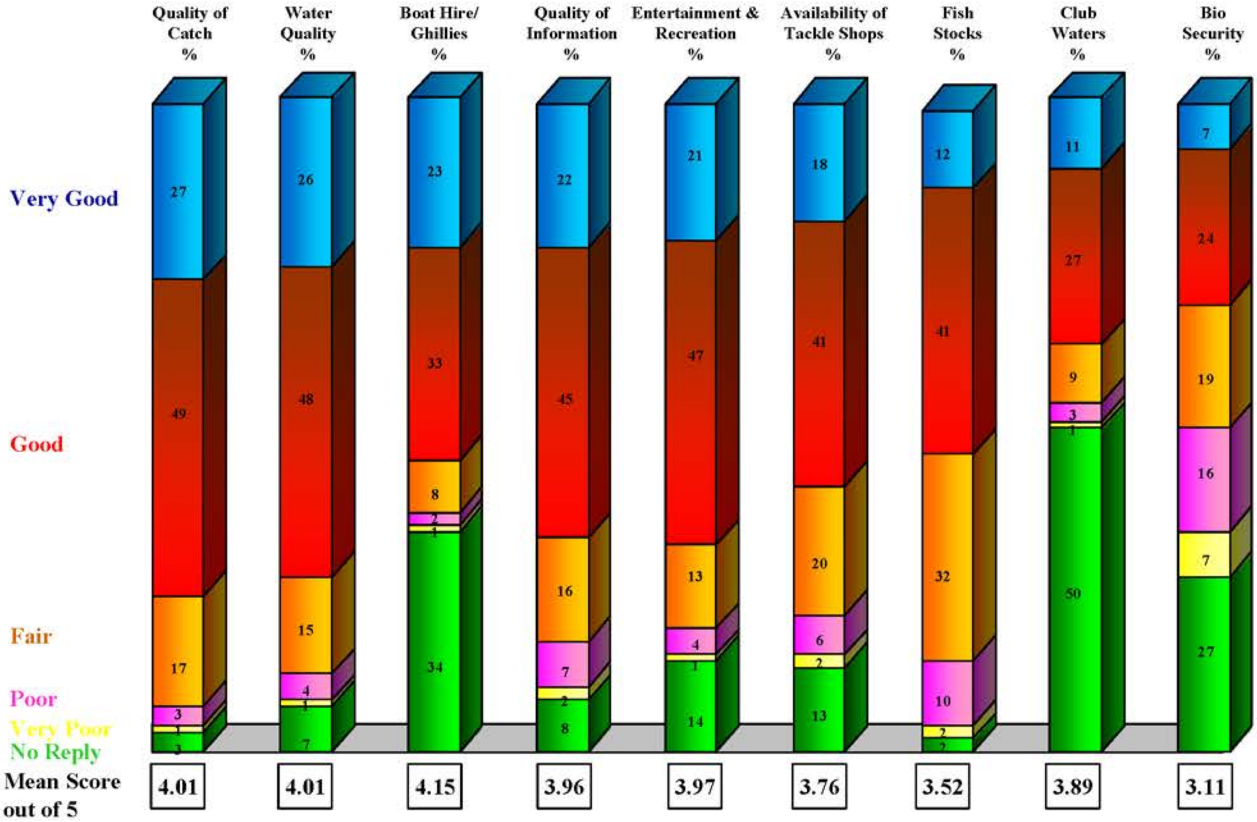
- Recreational anglers would welcome the implementation of a range of initiatives to improve angling in Ireland. Foremost in this regard is a request for more policing of the fisheries and, in particular, a desire to stamp out illegal fishing. There is also a call for initiatives including increased protection of fish stocks, increased conservation, increased bank side management and an increase in catch and release angling.

- Lack of fish (low stock levels), over-fishing, illegal fishing, netting, commercial fishing, pollution and invasive species were each identified as factors which have contributed to the dissatisfaction with current fish stocks.

- While a majority (59%) of anglers were satisfied with the availability of tackle shops, a significantly high proportion (28%) expressed dissatisfaction with this aspect of the product. These concerns are also shared by angling stakeholders. This dissatisfaction with fishing tackle shops is likely to relate to both a shortage of outlets (in particular parts of the country) and restricted opening hours.

- Notwithstanding the fact that a majority of anglers express satisfaction with the value for money of Irish angling, more than one in five (22%) were dissatisfied with the angling experience for this metric. Particular concerns relate to the cost of food, drink and accommodation allied to the fact that Ireland is seen as an 'expensive' destination.

**Rating of Aspects of Fishing Product (Part 2)**




## BENCHMARKING AGAINST COMPETITORS

- 41% of all recreational anglers have taken a holiday involving angling in countries other than Ireland over the last 3 years. Sea trout and bass anglers are more likely to have taken a trip to another country than other categories of anglers. The incidence of taking a fishing trip to a country other than Ireland was highest amongst European anglers (at 72%). Just under half (48%) of British anglers took a fishing trip to a country other than Ireland while one third (33%) of domestic anglers travelled abroad for angling in the last twelve months.

- For all anglers, Scotland (mentioned by 25%), England (20%) and Spain (17%) are the most popular countries visited by recreational anglers who had taken a foreign angling trip in the past 3 years. For British anglers, Scotland (mentioned by 32%) was the preferred destination, while Norway (35%) was the most popular country where European anglers are concerned.

- The quality of angling (amount and size) is cited as the most appealing aspect of competitor destinations visited for angling. Scenery, and the availability of different types of fish, are also important considerations where European anglers are concerned.

- Better management of fisheries is also cited as an area where competitive destinations have an advantage over Ireland. It should be noted that compliance with angling regulations is the norm in the Nordic countries and the private fisheries in Scotland do not have the same historic and cultural issues relating to bailiffs and land ownership as occurs in Ireland.

# 1

# Introduction

# 1. INTRODUCTION

## 1.1 INTRODUCTION

This report, which has been prepared by Tourism Development International (TDI) on behalf of Inland Fisheries Ireland (IFI), sets out the findings and conclusions from a *Socio-Economic Study of Recreational Angling in Ireland.* The project was conducted over a 9 month time frame from March to November 2012.

IFI is the State agency responsible for the protection, management and conservation of Ireland's inland fisheries and sea angling resources. Ireland has over 70,000 kilometres of rivers and streams and 144,000 hectares of lakes, all of which fall under the jurisdiction of IFI.

While some information is available on angling tourism, there has been an absence of recent in-depth research on recreational angling in Ireland, both in respect of domestic recreational anglers and overseas individuals participating in the sport. *An Economic Evaluation of Irish Angling* (Author B.J. Whelan) was undertaken in 1988. Other economic studies of relevance include *The Contribution to the Irish Economy of the Recreational Bass Fishing* (O'Shea, Diamond, Quinlan – 2010) and *An Economic/Socio-Economic Evaluation of Wild Salmon in Ireland* (Indecon – 2003). More recently Fáilte Ireland have undertaken a number of angling research assignments and studies including a *Survey of G.B. Anglers (2011)* and an *Angling Tourism Marketing Strategy (2007-2010)* (with the Central Fisheries Board).

This report seeks to address this information deficit by providing information (based on interviews with over 3,000 individuals) which will help underpin effective strategic planning and decision making both in respect of product development and marketing. Furthermore, the report sets out TDI's estimate of the economic impact of recreational angling in Ireland.

***In 2012, the overall (direct and indirect) impact of recreational angling in Ireland is estimated to be approximately €755 million.***

## 1.2 BACKGROUND

IFI engages with other key stakeholders including Fáilte Ireland on initiatives concerning angling tourism. In 2007, the two organisations prepared *"A new Strategy for Irish Angling Tourism"*. A suite of five angling brochures has also been produced. This collaborative approach by IFI also extends to engagement and liaison with other key stakeholders including angling federations and clubs throughout the country.

As indicated in the CSO/Fáilte Ireland National Tourism Statistics, the early years of the last decade experienced a rapid decline in the volume of overseas anglers visiting Ireland (most likely influenced by foot and mouth disease which put most rural fisheries off limits for anglers). There was a steady increase in the number of overseas anglers from 2003 to 2006 following recovery after the foot and mouth crisis and buoyant economic conditions. In line with the general downturn in overseas tourism to Ireland, the number of overseas anglers visiting the country declined again since 2007 with the most significant downturn being recorded in respect of the British market.

While the angling tourism statistics produced by Fáilte Ireland provide a top line indication of angling tourism activity, the absence of detailed information in the sector is restricting IFI's ability to make informed decisions on product development and marketing.

The findings from the *Socio-Economic Study of Recreational Angling in Ireland* have been prepared against a very challenging economic background. The global financial crisis of 2008 and subsequent economic recession have not only impacted on domestic demand for products and services, but have also contributed to a very significant downward adjustment in overseas tourism demand. At its peak in 2007, Ireland attracted an estimated 7.7 million overseas tourists. By 2010, the number of overseas tourists visiting the country declined by 22% to 6 million. 2011 saw a recovery with 6.5 million overseas tourists visiting Ireland, a performance that was repeated in 2012. Source: *Fáilte Ireland Tourism Facts 2010, 2011.*

In addition to economic conditions, the inclement summer weather experienced by Ireland in recent years, and 2012 in particular, has had an adverse impact on domestic Northern Ireland and overseas tourism and recreational angling. According to Met Eireann, it was the wettest June on record.

## 1.3 OBJECTIVES

The specific objectives of the *Socio-Economic Study of Recreational Angling in Ireland* are:

- To provide an estimate of the overall volume of domestic, Northern Ireland and overseas anglers and assess its reliability.

- To provide an estimate of the volume of domestic, Northern Ireland and overseas anglers by category and assess the reliability of these estimates:
  - Game – Salmon/Trout/Sea Trout
  - Coarse
  - Pike
  - Sea
  - Bass

- To prepare an estimate of angling expenditure (domestic, Northern Ireland and overseas; and by category), to consider and select the most appropriate method of valuation, and in consultation with IFI, considering the various definitions of economic value including income arising, willingness to pay, existence value, option value, and the social and economic value of angling tourism to the exchequer, etc.

- To obtain profile and travel pattern information on the five categories of anglers (i.e. country of residence; first time or repeat visitor; age; occupation; mode of transport; type of accommodation used, etc broken down by domestic, Northern Ireland and overseas).

- To review recent trends using previous studies (i.e. changes in profile, time of arrival, length of stay, etc) and highlight emerging trends in angling tourism.

- To obtain information on the number of trips and angling locations/fisheries used by anglers during their visit.

- To obtain an insight into the motivations of domestic, Northern Ireland and overseas recreational anglers. (What is Ireland's unique selling proposition as an angling destination?)

- To establish anglers' opinions and attitudes on the Irish angling product (overall quality of angling experience; environmental issues; shortcomings; value for money, etc.)

- To obtain feedback from anglers on suggested initiatives to improve the quality of the angling experience (both product and marketing related issues to be explored).

- To benchmark the Irish angling experience against competitor destinations which anglers have experienced.

## 1.4 ACKNOWLEDGEMENTS

The consultancy team would like to acknowledge the invaluable inputs and assistance given to the team by the staff of Inland Fisheries Ireland and to Suzanne Campion, Justine Barrett (Project Manager) and Inland Fisheries Ireland's Socio- Economic Advisor, Professor Brendan Whelan, in particular. We are very grateful for the input and support of our own advisors; Peter O'Reilly (Special Angling Advisor) and Dr Stephen Hynes (Economist with the Socio-Economic Marine Research Unit, NUI Galway) and also for the support and input of the Fáilte Ireland Economic Unit.

Particular thanks are also due to the many recreational anglers and angling stakeholders who gave of their time to participate in the survey.

**Tourism Development International**
**July 2013**

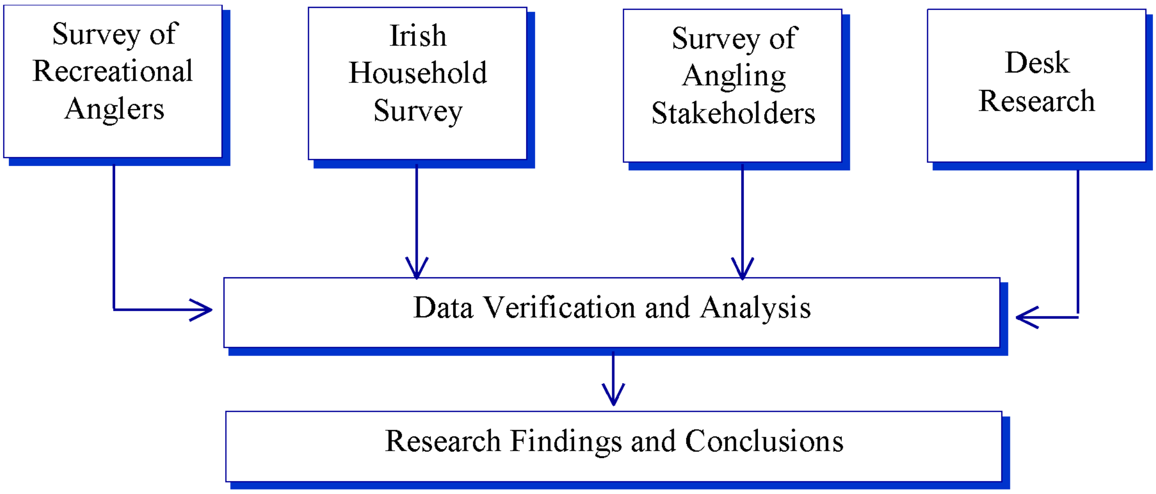
# 2

# Methodology

# 2. METHODOLOGY

In undertaking the *Socio-Economic Study of Recreational Angling in Ireland*, TDI put in place a comprehensive programme of research comprising three primary surveys augmented by desk research analysis. The three primary surveys comprised a *Survey of Recreational Anglers* (sample 903); *Household Survey* (sample 2,011); and *Survey of Angling Stakeholders* (sample 102).

**Figure 2.1 – Socio-Economic Study of Recreational Angling Research Components**




## 2.1 LITERATURE REVIEW

As an initial task undertaken for this project, TDI carried out a comprehensive review of statistical data, surveys and studies related to the subject of recreational angling. These studies and data sources reviewed varied in terms of scope and many of the estimates are now well out of date.

In seeking to put recreational angling in Ireland in context, the review initially sought to establish a benchmark based on reported recreational angling volumes and value in Europe. In this regard, the European Anglers Alliance (EAA) has estimated that "*there are at least 25 million recreational anglers (6.5% of the population) in Europe spending more than $25 billion on their sport*" (Source: Boughton Review of Angling Statistics – 2007). In terms of specific European Countries, in the United Kingdom, overall participation in angling is estimated at 13% of the population over 12 years (Source: Public Attitudes to Angling in the UK – 2005). In Sweden, an estimated 1 million residents (15% of the population aged 16-74 years) went fishing recreationally in 2006 (Source: Fisker Iverket). In Denmark, an earlier estimate indicated that country has 650,000 anglers (12% of the population – Source: Gallup 2006).

In Ireland, an early benchmark of Irish angling was established by Brendan J. Whelan and Geraldine Marsh in their report *An Economic Evaluation of Irish Angling (1988)*. At the time, it was estimated that there were about 122,000 anglers in Ireland (This represents 4.8% of the Irish population aged 15 years or older at that time - 2.5 million). Game fishing was by far the most popular form of angling accounting for an estimated 81,000 participants.

The same source estimated that 54,000 overseas anglers visited Ireland in 1986. In 1986, Ireland attracted 2 million overseas visitors. Therefore 2.7% of overseas visitors participated in angling at that time. Although the number of overseas visitors participating in angling in 1986 is lower than it is now, the proportion of overseas visitors currently participating in the activity is lower than it was in 1986 (see Section 3.2).

More recently, Sea Angling Ireland published the *Bass Angling Survey (2010).* This particular source estimated that Irish Sea Anglers spend approximately €182 million per annum in pursuit of this sport.

As previously referred to in Section 1.2, Fáilte Ireland (and previously Bord Fáilte) have provided information on the volume, value and market profile of overseas angling visitors to Ireland drawing on the *Survey of Overseas Travellers*. Britain and Europe (particularly France and Germany) have been the two most important overseas markets although the volume of anglers from these market areas has fluctuated year on year. In 2012, Fáilte Ireland estimated that 113,000 overseas visitors had participated in recreational angling in 2011 spending an estimated €97 million.

*A New Strategy for Irish Angling Tourism*, prepared by the Central Fisheries Board (CFB) and Fáilte Ireland in 2005, set out a vision and strategy for the sector. Two years later Fáilte Ireland and the CFB commissioned Genesis Strategic Management Consultants to prepare a more detailed *Angling Tourism Marketing Strategy 2007-2010.*

In 2011, in association with *Go Fishing*, Fáilte Ireland carried out a programme of game, sea and coarse angler surveys. In a number of instances selected findings from these surveys, and the other sources referred to above, have been included in the body of this report.

A full list of references is included as Appendix A.

## 2.2 SURVEY OF RECREATIONAL ANGLERS

The *Survey of Recreational Anglers* was carried out over a 9 month timeframe from March to November 2012. In total, 903 recreational anglers were interviewed. The sample for the *Survey of Recreational Anglers* comprised individuals from the Republic of Ireland, Northern Ireland and overseas markets whose main purpose of visit was recreational angling. The overall objective was to obtain a representative sample of recreational anglers.

The timing of the *Survey of Recreational Anglers* was scheduled to coincide with the full angling season in respect of each angling category. A master list of fisheries throughout Ireland was drawn up and from this 50 fisheries/sampling locations were chosen at random. This approach was used to maximise the overall representativeness of the survey and to ensure that all regions and all angling categories were fully covered. All interviews took place at these 50 sampling locations/fisheries.

The interview approach adopted for the *Survey of Recreational Anglers* was identical to the approach employed in the *Socio-Economic Survey of Anglers to Loughs Corrib, Mask and Carra* which was commissioned by the Central Fisheries Board in year 1995. The latter survey comprised interviews with 255 visiting domestic and overseas anglers. Interviews were conducted at various locations on/around the lough shores, and following initial contact with anglers, at accommodation establishments and public houses.

For this project, interviewers were issued with strict guidelines on the interviewing approach to be adopted. Some anglers were happy to be interviewed at the fishery (i.e. lake, river, sea shore, etc) while others expressed a preference to be interviewed at the end of the days angling (i.e. at their accommodation or the local public house). Some anglers opted to complete the survey by telephone or on-line.

Fieldwork administrators monitored interview activity throughout to ensure that the sample of recreational anglers was fully representative and consistent with the sampling approach agreed with IFI at the outset of the project.

The 903 interviews for the *Survey of Recreational Anglers* were derived from the following methods:

- 692 face to face interviews
- 32 on-line primary contacts
- 179 on-line secondary contacts

On-line primary contacts comprised anglers who were approached by interviewers in the course of the survey, provided their contact details and subsequently completed the survey on-line.

27 of the on-line secondary contacts were anglers whose names/contact details were supplied by local angling contacts. The majority (152) of on-line secondary contacts were sourced following a ‘booster’ initiative in September and October 2012. For this ‘booster’ initiative, 10 angling establishments agreed to keep contact sheets for a period of approximately 2 weeks. The angling establishments selected were participants in the *Survey of Angling* Stakeholders and comprised a mix of businesses catering for game, coarse and sea anglers. The establishments in question were encouraged to invite their angling customers to record their contact details in the full knowledge that they would be invited to participate in the on-line *Survey of Recreational Anglers*.

The questionnaire design and analysis approach used conforms with best industry standards as set out by E.S.O.M.A.R. (the World Association for Social, Opinion and Market Research).

## 2.3 IRISH HOUSEHOLD SURVEY

In order to obtain estimates of the volume of recreational angling undertaken by Irish residents, arrangements were put in place to undertake a survey, which would be representative of the adult population of the country (aged 15 years +). To this end, Millward Brown Lansdowne was commissioned to undertake a household survey through their monthly omnibus survey.

In order to ensure maximum representativeness, two surveys were conducted (in May and October 2012) yielding a combined total sample of 2,011 adults. As the survey was confined to adults (aged 15+), the survey does not take into consideration the angling patterns of younger anglers.

## 2.4 SURVEY OF ANGLING STAKEHOLDERS

IFI engages with angling stakeholders on an on-going basis. The key stakeholder set includes angling federations and clubs around the country. At a wider level, other stakeholders are those that earn their living from angling. This category includes accommodation providers, fishing tackle shop owners, ghillies, boat hire companies and restaurants/public house owners.

Given the importance of these stakeholders to recreational angling, a programme of research was undertaken to supplement the quantitative research obtained through the *Survey of Recreational Anglers* and the *Irish Household Survey*. In total, 102 interviews were conducted for this component of the research. The sample was selected from a database of angling related enterprises and contacts supplied by IFI. A contact sample from this database was selected with a view to achieving representation of each stakeholder category. Interviews were conducted during September and October. A combination of face-to-face and telephone methodologies were employed for the *Survey of Angling Stakeholders*. The sample composition is presented in Figure 2.2 below.

**Figure 2.2 – Angling Stakeholders Sample Details**

| | |
|---|---|
| Accommodation Establishments | 34 |
| Fishing Tackle Shops | 22 |
| Ghillie/Guide | 15 |
| Boat Hire Operators | 15 |
| Charter Boat Operators | 13 |
| Other * | 3 |
| **Total** | **102** |

Source: Survey of Angling Stakeholders
*Other includes 2 Private fisheries and an angling centre.

## 2.5 OVERVIEW OF RESEARCH OUTPUTS

Figure 2.3 below provides an overview of the research outputs that have been generated from each of the research components.

**Figure 2.3 – Approach / Research Outputs**

| Approach/Research Component<br>Research Objectives/Outputs | Survey of Recreational Anglers | Irish Household Survey | Survey of Angling Stakeholders |
|---|---|---|---|
| Volume and value of domestic, Northern Ireland and overseas anglers | λ | λ | |
| Volume and value by category | λ | λ | |
| Estimate angling expenditure/ economic value of angling | λ | λ | |
| Profile and travel pattern information of angler categories | λ | λ | |
| Review recent/emerging trends in angling tourism | | | λ |
| Information on trips and locations used by anglers | λ | λ | |
| Obtain insight into anglers motivations | λ | | λ |
| Obtain feedback on initiatives to improve quality of angling | λ | | λ |
| Benchmark the Irish angling experience against competitor destinations | λ | | λ |

## 2.6 RELIABILITY OF RESEARCH FINDINGS

***Survey of Recreational Anglers***

The *Survey of Recreational Anglers* comprised a sample of 903 domestic, Northern Ireland and overseas recreational anglers. The survey was conducted over a nine month timeframe – March to November 2012 – to ensure coverage of the main angling season. This survey was designed to profile the trip, traveller characteristics, attitudes and opinions of recreational anglers. While the survey sample comprised interviews with all categories of anglers, the numbers of anglers interviewed in each angling sector cannot be interpreted as an accurate assessment of the relative size of each angling sector. Although in the case of salmon angling, the proportion of these anglers interviewed in the *Survey of Recreational Anglers* is in fact broadly similar to the proportions indicated in the *Household Survey*).

On the assumption that the sample for the *Survey of Recreational Anglers* corresponds broadly to a simple random sample its margin of error is +/- 3.1% with 95% confidence (at 50% reporting incidence) which is standard for a national survey such as this one.

***Household Survey***

The *Household Survey* comprised a sample of 2,011 Irish adults. The sample is representative of the Irish population (aged 15 years+). The survey was conducted in two waves in 2012 by Millward Brown Lansdowne (in May and October).

The *Household Survey* has been undertaken for the primary purpose of estimating the volume of anglers in the Republic of Ireland. The *Household Survey* has produced an estimate of the adult population who **ever** fished and those who fished in the **last 12 months.** (On both survey waves, the proportion of the population claiming they had participated in angling in the **last 12 months was 7%.**)

While the *Household Survey* achieved its primary objective in determining the overall volume of Irish recreational anglers, caution should be exercised in examining volume estimates of anglers by **type of angling/category** due to the small sample size upon which these estimates are based (i.e. 137 individuals – 7% of sample). It should be noted that the sample size of 2,000 was more than adequate to establish the number of anglers in Ireland, however, it is when the 131 responses that make up the 7% are analysed further that the accuracy diminishes. To this end, it is recommended that for future research studies, the number of waves of research in the *Household Survey* be increased (to a minimum of 8 waves) in order to achieve a more robust sample of recreational anglers .

The margin of error on the *Household Survey* is +/- 2.2% with a 95% confidence (at 50% reporting incidence).

***Survey of Angling Stakeholders***

The sample achieved for the *Survey of Angling Stakeholders*, at 102, was very robust and representative of the 767 angling enterprises in the country as identified by IFI.

# 3

# Volume & Value of Recreational Angling

# 3. VOLUME AND VALUE OF RECREATIONAL ANGLING

## 3.1 INTRODUCTION

This section of the report presents overall estimates of the volume and value of recreational angling in Ireland, in respect of domestic, Northern Ireland and overseas anglers.

## 3.2 RECREATIONAL ANGLING VOLUME ESTIMATE

### 3.2.1 Estimate of Volume of Domestic Recreational Anglers

In estimating the volume of recreational angling in Ireland, a number of sources have been drawn on. The estimate of the volume of **domestic** recreational angling is based on information derived from the *Household Survey* undertaken by Millward Brown Lansdowne, specifically for this project. As the *Household Survey* is representative of the Irish Adult population, it is a source of data that is less susceptible to bias.

Two separate household surveys were undertaken with a representative sample of the adult population in 2012. On both occasions, 7% of the sample indicated that they had participated in recreational angling in the past year. By applying this level of 'penetration' to the population estimates, the estimate of 252,000 anglers as presented in Figure 3.1 below was established. This is broadly consistent with the estimated number of anglers within Europe (6.5%) as reported by the European Anglers Alliance (EAA).

Participation in angling in the last twelve months is highest amongst those aged 35-49. This is the age cohort most likely to have children in the house aged under 15 years.

### 3.2.2 Estimate of Volume of Overseas Recreational Anglers

The estimate of the volume of **overseas** recreational anglers (113,000) is based on information derived from the 2011 *Fáilte Ireland Survey of Overseas Travellers*[1]. (This represents 1.7% of overseas visitors to Ireland in 2011.)

### 3.2.3 Estimate of Volume of Northern Ireland Recreational Anglers

In arriving at the estimate of the volume of recreational anglers from Northern Ireland, the market profile of respondents who participated in the *Survey of Recreational Anglers* was reviewed. In this regard, the proportion of Northern Ireland anglers within the sample relative to domestic anglers and overseas anglers (10%) was established, which translates to an estimated 41,000 visits/trips made by Northern Ireland individuals participating in

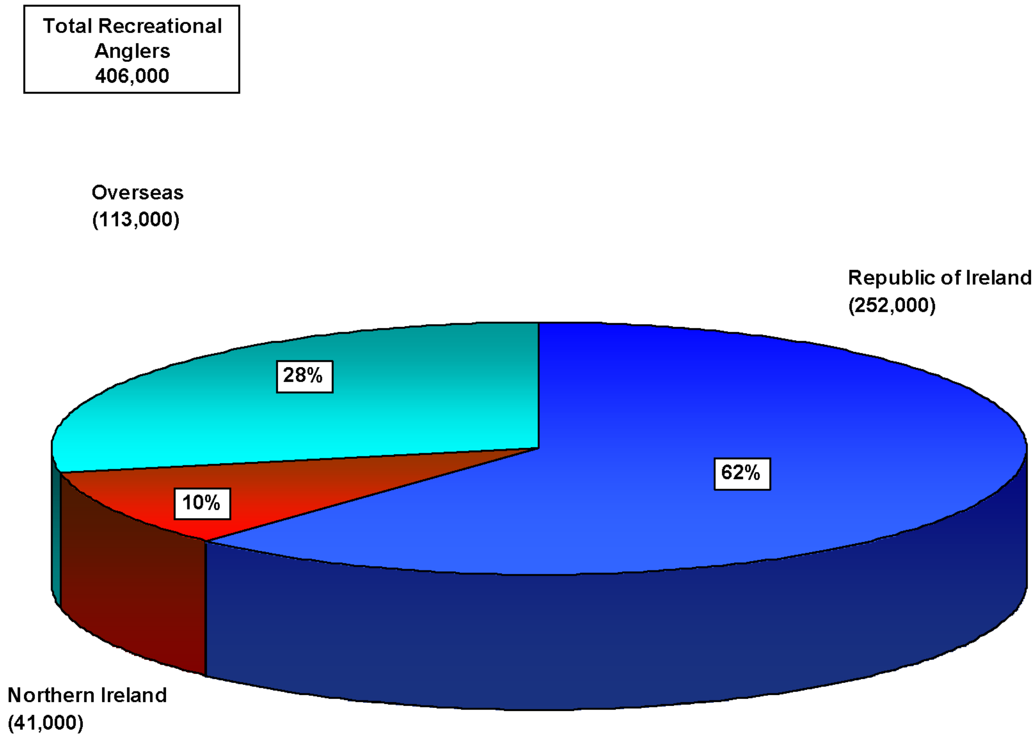
[1] Fáilte Ireland Survey of Overseas Travellers results for 2011 were published during the preparation of this report. Revisions in the Central Statistics Office (CSO) 2011 estimates may result in revisions to Fáilte Ireland estimates of the volume of overseas visitors participating in angling. The 2012 Survey results were not available in time for inclusion in this report.

recreational angling in Ireland. In the absence of definitive information on the volume of Northern Ireland anglers, the above Figure represents a best estimate.

### 3.2.4 Overall Volume Estimate

In 2012, an estimated 406,000 individuals participated in recreational angling in Ireland. Of this total, just over one quarter of a million individuals (252,000 – 62% of total) were from the Republic of Ireland. An estimated 113,000 (28%) recreational anglers originated from overseas markets. Northern Ireland residents undertook an estimated 40,600 angling visits in 2012 – 10% of the total. This estimate of 113,000 overseas 'anglers' is in fact the number of visits made by overseas anglers. Many visiting anglers undertake two or more visits during the year.

**Figure 3.1 – Recreational Anglers – Volume x Market**




Source: TDI/Fáilte Ireland - Survey of Overseas Travellers

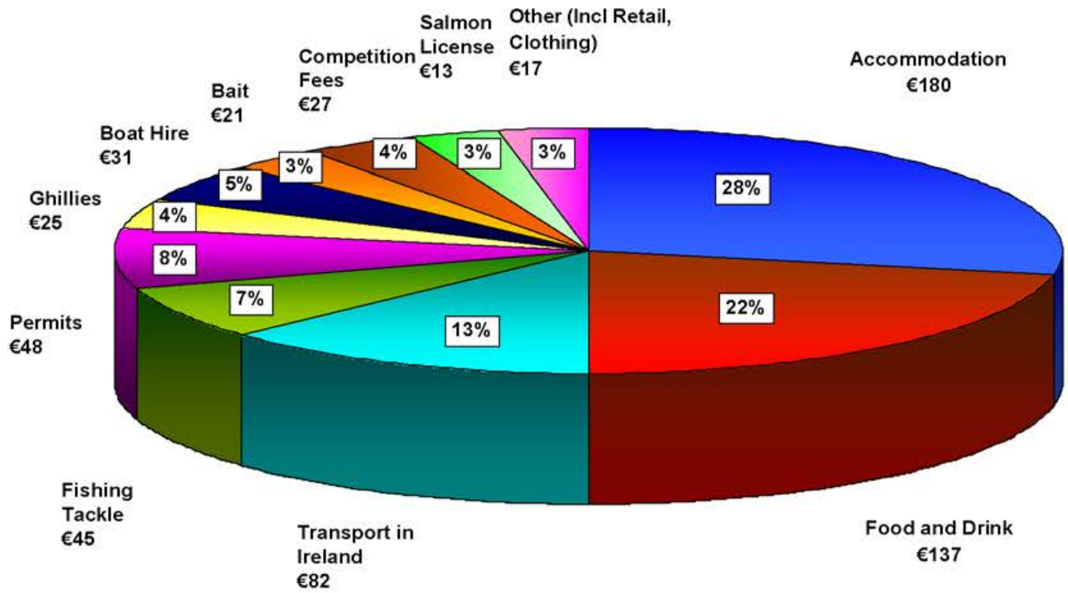
## 3.3 ANGLING EXPENDITURE

### 3.3.1 Expenditure incurred on this Trip

Anglers were surveyed on their expenditure based on their current trip, 'this trip'. Taking all markets into account – Domestic, Northern Ireland and Overseas – recreational anglers spent an average of €734 for the trip under review. Excluding expenditure on flights/ferries, anglers spent an average of €628. The expenditure levels recorded in response to this question can be interpreted as being typical of angler expenditure patterns.

Accommodation accounted for more than one quarter of expenditure (€180 - 28%) on overnight trips, while food and drink (€137 - 22% of expenditure), and transport within Ireland (€82 – 13%) represented significant expenditure items. Figure 3.2 below provides a breakdown of expenditure incurred by anglers for the trip under review (note, expenditure on international travel to Ireland has been excluded from this Figure).

**Figure 3.2 – Expenditure Incurred on this Trip**




Source: Survey of Recreational Anglers

The analysis of expenditure presented above is based on an average of all anglers – domestic (local, day visitors and overnight) Northern Ireland and overseas. Further analysis of expenditure patterns are presented in this section of the report.

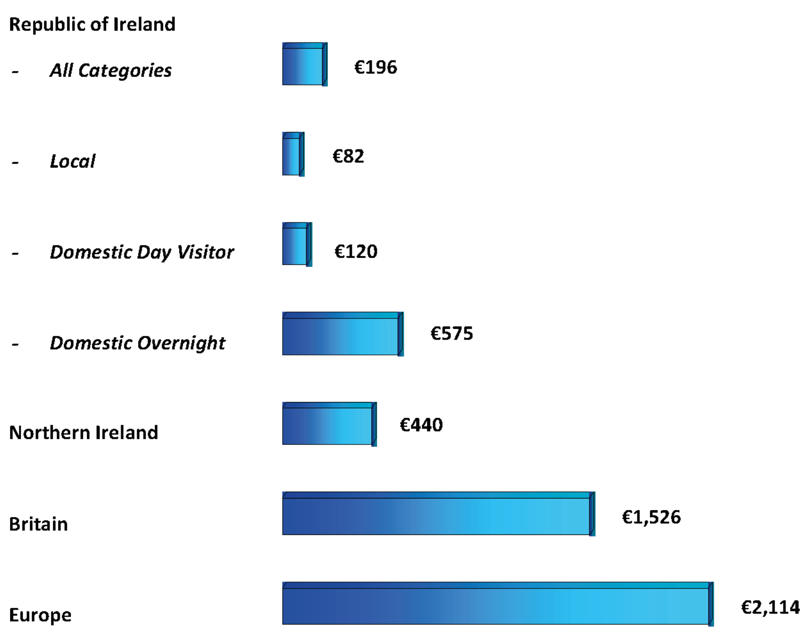
### 3.3.2 Expenditure incurred by Market

As expenditure incurred by anglers (for the trip under review) is influenced by length of stay, expenditure incurred by out-of-state anglers is significantly higher than the outlay made by their Irish counterparts.

With an average trip duration of 1.4 days, domestic anglers spent €196 for the trip under review. British anglers spent on average €1,526 while their European counterparts spent an estimated €2,114 during their trip (based on 9 day and 11.5 days length of stay respectively). Further analysis on length of stay of recreational anglers is presented in Section 6.4.

Obvious variations also occur in respect of domestic angler expenditure levels for local anglers, domestic day visitors and overnight anglers as shown in Figure 3.3 below.

**Figure 3.3 – Expenditure* on Current Trip – Average Spend**




Source: Survey of Recreational Anglers * Expenditure includes flight/ferry

### 3.3.3 Expenditure Components

All recreational anglers and particularly those from overseas markets, play an important role in supporting the Irish economy through their expenditure. Apart from angling enterprises such as fishing tackle shops, ghillies and boat hire, other enterprises such as accommodation establishments, pubs, restaurants and car hire companies also benefit to a significant extent from this expenditure. Some expenses are shared across trips.

Republic of Ireland anglers spent on average 31% of their expenditure on accommodation, food and drink while on an angling holiday in Ireland. All other anglers (Northern Irish, British and European and other) allocated more towards accommodation food and drink with spend ranging from 45% - 57% of their trip expenditure, excluding international travel.

Transport costs (both to Ireland and within the country) have been included in the expenditure information shown and account for 25% of total spending on the trip under review. Across all markets, over one euro in ten (11%) was spent on transport in Ireland. Spend on transport in Ireland was similar for Republic of Ireland and Northern Irish anglers (16% and 15% respectively). The disparity in expenditure on transport between British, European and long haul anglers, can be explained by the fact that two thirds (68%) of European anglers used a hired car as their main source of transport during their stay in Ireland. By comparison, only 14% of British anglers had rented a car for their trip. The very high expenditure estimate recorded in respect of access transport for anglers from 'long haul' markets can partially be explained by the very high proportion of expenditure allocated to air fares.

Direct angling related expenditure (fishing tackle, bait, permits, salmon licences, ghillies, boat hire and competitions entrance fees) was highest for the domestic anglers at 49% for Republic of Ireland anglers and 37% for Northern Irish anglers. The low spend on permits by domestic anglers could reflect use of club waters. Proportional spend was again similar for British and European anglers at 25% and 27% respectively. The spend on angling related items was lowest for long haul visitors at 10% (or 17% if not including international travel in overall spend).

**Figure 3.4 – Expenditure Incurred on this Trip**
**Expenditure Components x Market**

| | All Recreational Anglers € | Republic of Ireland € | Northern Ireland € | Britain € | Europe € |
|---|---|---|---|---|---|
| Fishing tackle | 46 | 30 | 26 | 80 | 86 |
| Bait | 21 | 10 | 15 | 56 | 15 |
| Permits | 48 | 14 | 67 | 76 | 170 |
| Salmon Licence | 13 | 10 | 13 | 11 | 35 |
| Ghillies | 25 | 8 | 6 | 60 | 58 |
| Boat hire | 31 | 8 | 15 | 36 | 200 |
| Food and drink | 137 | 38 | 91 | 308 | 380 |
| Accommodation | 180 | 24 | 109 | 427 | 548 |
| Flight/ferry | 106 | 0 | 0 | 241 | 348 |
| Transport in Ireland | 82 | 32 | 65 | 138 | 219 |
| Retail | 4 | 1 | 1 | 4 | 16 |
| Clothing | 7 | 4 | 10 | 6 | 17 |
| Competition fees | 27 | 16 | 23 | 69 | 3 |
| Other | 6 | 1 | 0 | 14 | 20 |
| **Total (Incl. Flight/Ferry)** | **734** | **196** | **440** | **1,526** | **2,114** |
| **Total (Excl. Flight/Ferry)** | **628** | **196** | **440** | **1,285** | **1,766** |

Source: Survey of Recreational Anglers

Figure 3.5 provides an insight into recreational angling patterns. Although long-haul travellers from beyond Europe were interviewed, the numbers achieved was insufficient to allow for statistical analysis. For this reason, long-haul anglers have been excluded from the analysis presented in Figure 3.5 and subsequent Figures. As expenditure is averaged across all angler categories, items such as salmon licences, competition fees and boat hire may appear low as such items are not relevant to all anglers. Variations are also in evidence in respect to the expenditure patterns of the different categories of anglers. Many anglers fish for more than one species during the year, but for present purposes, an angler's category was determined by the species targeted on the angler's current trip. Key variations by category defined are summarised in Figure 3.5 below:

- **Salmon Anglers - and Sea Trout Anglers -** Spending patterns were very similar for both salmon and sea trout anglers; however salmon anglers spent more on permits than sea trout anglers (€139 compared with €91). Sea trout anglers spent slightly more on fishing tackle (5% compared with 4% of overall spend), ghillies (6% compared with 5% of overall spend) and boat hire (3% compared with 2 % of overall spend) compared with salmon anglers. Spend in regard to non-angling related items such as accommodation and travel were very similar with the exception of flights and ferries.

- **Brown Trout Anglers -** Brown trout anglers spent similar amounts on fishing tackle as salmon anglers (€36 compared with €39), however, as would be expected, they spent much less on permits. An average spend of €18 was recorded for salmon licences by brown trout anglers which would imply that a number of brown trout anglers were also fishing for salmon on the trip where they were surveyed. The average spend on food and drink, accommodation, flights and ferries and transport in Ireland was considerably lower than that of either salmon or sea trout anglers which would imply that the majority of brown trout anglers were domestic anglers and possibly fishing their local waters for the most part.

- **Pike Anglers -** Both pike and bass anglers were the biggest spenders when it came to fishing tackle. In the case of pike anglers their proportional spend was 12%, twice the overall average of 6% for all anglers. Equally, spend for bait was high at €28. Average spend for ghillies was on the low side at €13, implying pike anglers for the most part were fishing without the assistance of a ghillie. Boat hire expenditure (at €41) was nearly 10 times that of coarse anglers (€3) in particular, but also considerably higher than the game anglers. Expenditure on food, drink and accommodation was however slightly lower than that for coarse anglers. Not surprisingly, spend on competition fees was high at €44 (8% of total spend), only topped by coarse anglers who spent €73 on competitions on the trip under review.

- **Coarse Anglers -** On average, coarse anglers spent €271 (52% of their total expenditure) on food, drink and accommodation on this trip. Game anglers were also big spenders in terms of food, drink and accommodation, spending more in terms of actual spend (€383 salmon and €362 sea trout), but this expense accounts for a smaller proportion of a game anglers overall spend (46% salmon or 47% sea trout, not including spend on flights and ferries).

- **Bass Anglers -** After salmon, bass anglers recorded the highest average expenditure (for the trip under review). These anglers allocated almost 50% of their total expenditure to accommodation (€268) and food and drink (€181). As with sea anglers, boat hire was a significant expenditure item accounting for 10% of total expenditure for the trip under review (€90).

- **Sea Anglers -** Food and beverage also accounts for a high proportion of total expenditure where sea anglers are concerned - €147 (22% of total expenditure, or 45% when combined with spend on accommodation). Sea anglers allocated one euro in ten (10%) to boat hire, which is well above the average for all anglers.

Figure 3.5 below presents a breakdown of expenditure by angling category. The information relates to expenditure incurred on the trip under review and has been derived from the *Survey of Recreational Anglers*.

**Figure 3.5 – Expenditure Incurred on this Trip**
**Expenditure Components x Category**

| | All Recreational Anglers € | Salmon € | Sea Trout € | Brown Trout € | Pike € | Coarse (Excl. Pike) € | Bass € | Sea (Excl. Bass) € |
|---|---|---|---|---|---|---|---|---|
| Fishing tackle | 46 | 39 | 49 | 36 | 73 | 43 | 75 | 51 |
| Bait | 21 | 7 | 5 | 5 | 28 | 55 | 16 | 22 |
| Permits | 48 | 139 | 91 | 31 | 8 | 4 | 7 | 1 |
| Salmon Licence | 13 | 37 | 34 | 18 | 4 | 0 | 7 | 2 |
| Ghillies | 25 | 49 | 54 | 28 | 13 | 0 | 49 | 9 |
| Boat hire | 31 | 17 | 25 | 17 | 41 | 3 | 90 | 70 |
| Food and drink | 137 | 154 | 140 | 75 | 98 | 124 | 181 | 147 |
| Accommodation | 180 | 229 | 222 | 99 | 135 | 147 | 268 | 156 |
| Flight/ferry | 106 | 149 | 164 | 72 | 53 | 82 | 121 | 96 |
| Transport in Ireland | 82 | 117 | 106 | 63 | 66 | 62 | 79 | 70 |
| Retail | 4 | 9 | 9 | 2 | 7 | 1 | 3 | 3 |
| Clothing | 7 | 7 | 12 | 6 | 13 | 5 | 7 | 6 |
| Competition fees | 27 | 4 | 4 | 7 | 44 | 73 | 11 | 26 |
| Other | 6 | 9 | 11 | 5 | 5 | 1 | 12 | 5 |
| **Total (Incl. Flight/Ferry)** | **734** | **967** | **925** | **463** | **586** | **601** | **927** | **662** |
| **Total (Excl. Flight/Ferry)** | **628** | **818** | **761** | **391** | **533** | **519** | **806** | **566** |

Source: Survey of Recreational Anglers

## 3.4 AVERAGE PER PERSON EXPENDITURE

### 3.4.1 Average Per Person Expenditure x Market

When administering the questions on expenditure, the question was asked '*How many individuals does this expenditure relate to?*' In some instances, anglers travel with family members or friends. Overall, it can be seen that for recreational anglers, the number of individuals that the expenditure related to worked out at 1.2. For Irish anglers, the average number of individuals that the expenditure related to was 1.1. Where European recreational anglers are concerned, the corresponding figure worked out at 1.5.

In taking into account the number of individuals that expenditure relates to, **average per person expenditure** for the trip under review for all recreational anglers is estimated to be €523. This takes into account expenditure on such items as accommodation, food or car hire that would have been shared between a number of individuals travelling together. Figure 3.6 provides a breakdown of this information by market[2].

**Figure 3.6 – Expenditure Incurred on this Trip**
**Average per Person Expenditure x Market**

| | All Recreational Anglers | Republic of Ireland | Northern Ireland | Britain | Europe | Other* | Overseas (Average) |
|---|---|---|---|---|---|---|---|
| Average Expenditure on this trip* | €628 | €196 | €440 | €1,285 | €1,766 | €1,960 | €1,438 |
| Number of Individuals Expenditure Relates to | 1.2 | 1.1 | 1.2 | 1.4 | 1.5 | 1.3 | 1.4 |
| Average Per Person Expenditure | €523 | €178 | €367 | €918 | €1,177 | €1,508 | €1,027 |

**Excludes flight/ferry*

Source: Survey of Recreational Anglers

### 3.4.2 Average Per Person Expenditure x Category

Average per person trip expenditure ranges from a high of €744 for salmon anglers and €692 for sea trout anglers to a low of €355 where brown trout anglers are concerned.

**Figure 3.7 – Expenditure Incurred on this Trip**
**Average per Person Expenditure x Category**

| | All Recreational Anglers | Salmon | Sea Trout | Brown Trout | Pike | Coarse (excl. Pike) | Bass | Sea (Excl. Bass) |
|---|---|---|---|---|---|---|---|---|
| Average Expenditure on this trip* | €628 | €818 | €761 | €391 | €533 | €519 | €806 | €568 |
| Number of Individuals Expenditure Related to | 1.2 | 1.1 | 1.1 | 1.1 | 1.2 | 1.2 | 1.4 | 1.3 |
| Average per Person Expenditure on this trip | €523 | €744 | €692 | €355 | €444 | €432 | €576 | €437 |

**Excludes expenditure on flight/ferry*

Source: Survey of Recreational Anglers

[2] Caution should be exercised when reviewing data based on sub-samples where the level of accuracy diminishes with reduced sample size (see Section 2.6)

## 3.5 ANNUAL EXPENDITURE ON FISHING

Respondents from the Republic of Ireland and Northern Ireland were requested to provide details on their annual expenditure on fishing in the *Survey of Recreational Anglers*. The results for both are presented in Figure 3.8 below.

In order to reduce the influence of those domestic recreational anglers making a higher frequency of trips (and recording a higher spend) and to enhance the representativeness of the survey data, the survey results were re-weighted taking into account trip information recorded for anglers. Those respondents in the sample who made fewer trips and who were less likely to be surveyed were given a higher weighting in the data and those who made a higher number of trips and who were therefore more likely to be surveyed on the ground were given a lower weighting at the analysis stage[3].

Republic of Ireland anglers spend an estimated €1,974 annually on fishing. At €464, fishing tackle accounts for the highest share (23%) of total annual expenditure incurred by domestic anglers. Significant sums are also expended on transport (€393 – 20% of total), food and drink (€333 – 17%) and accommodation (€238 – 12%). A breakdown of annual expenditure for domestic anglers and Northern Ireland anglers is presented in Figure 3.8.

[3] An on-site survey such as the Survey of Recreational Anglers conducted for this report is subject to the problem of endogenous stratification. Due to the method of data collection, the likelihood of being sampled depends on the frequency with which an individual visits the recreational site. In order to account for this issue of endogenous stratification in our sample, we apply a sampling weight to observations equal to the inverse of the estimated probability that an individual will visit the site that he or she has been interviewed at. By using the ratio of the average number of trips taken to the actual number of trips taken, we reduced the influence of those individuals making a higher frequency of trips. This reduces the proportional influence on the estimated expenditure estimates of individuals that have a higher probability of being included in the sample because of the on-site sampling design (i.e. those who are more likely of being sampled due to the increased frequency with which they visit the fishing site).

**Figure 3.8 - Annual Expenditure on Angling – Domestic & Northern Ireland Anglers**

| | Republic of Ireland € | Northern Ireland € |
|---|---|---|
| Fishing Tackle | 464 | 582 |
| Bait | 114 | 153 |
| Permit | 83 | 197 |
| Salmon Licence | 29 | 49 |
| Ghillies | 41 | 38 |
| Boat Hire | 52 | 68 |
| Food and Drink | 333 | 538 |
| Accommodation | 238 | 444 |
| Transport in Ireland | 393 | 521 |
| Clothing | 82 | 103 |
| Fishing Competitions | 141 | 274 |
| Other | 4 | 8 |
| Total Expenditure per Annum | 1,974 | 2,974 |

Source: Survey of Recreational Anglers

Figure 3.9 presents a breakdown of the various components of domestic annual expenditure for each angler category. The highest average annual expenditure on angling by domestic recreational anglers was recorded in respect of coarse anglers who spent an average of €3,469 annually on angling. At the other end of the expenditure spectrum, domestic sea anglers spent an average of €1,331 annually on angling. As noted above, angler category is based on the species targeted on the current trip. This explains why items specific to a particular type of angling (e.g. salmon / sea trout licences) are attributed to anglers whose current category is different (e.g. pike or brown trout).

**Figure 3.9 - Annual Expenditure on Angling – Domestic Anglers x Category**

| | ROI Anglers € | Salmon € | Sea Trout € | Brown Trout € | Pike € | Coarse (Excl. Pike) € | Bass € | Sea (Excl. Bass) € |
|---|---|---|---|---|---|---|---|---|
| Fishing tackle | 464 | 297 | 357 | 300 | 973 | 968 | 761 | 276 |
| Bait | 114 | 42 | 38 | 40 | 68 | 470 | 155 | 77 |
| Permit | 83 | 274 | 206 | 105 | 64 | 41 | 71 | 27 |
| Salmon licence | 29 | 75 | 62 | 38 | 30 | 8 | 23 | 11 |
| Ghillies | 41 | 95 | 61 | 41 | 126 | 8 | 68 | 4 |
| Boat hire | 52 | 41 | 43 | 43 | 64 | 12 | 68 | 104 |
| Food and drink | 333 | 411 | 375 | 325 | 361 | 521 | 424 | 183 |
| Accommodation | 238 | 354 | 261 | 195 | 269 | 374 | 264 | 117 |
| Transport in Ireland | 393 | 448 | 338 | 350 | 293 | 616 | 552 | 350 |
| Clothing | 82 | 97 | 97 | 97 | 96 | 83 | 158 | 69 |
| Fishing competitions | 141 | 43 | 50 | 118 | 81 | 365 | 132 | 102 |
| Other | 4 | 2 | 3 | 4 | 3 | 2 | 9 | 9 |
| **Total Expenditure per Annum** | **1974** | **2179** | **1891** | **1655** | **2427** | **3469** | **2685** | **1331** |

Source: Survey of Recreational Anglers

Annual expenditure on fishing varied quite significantly according to age. Younger anglers (aged 18-34) spent an average of €626 per annum on fishing. Middle aged anglers (aged 35-54) spent an average of €2,590 per annum while older anglers (aged 55+) spent an average of €2,235 each year on the sport.[4]

[4] Note: Domestic Anglers were not asked for details relating to expenditure abroad. However, some anglers may have included expenditure incurred on foreign trips in their average annual spend on recreational angling.

## 3.6 VALUE OF RECREATIONAL ANGLING IN IRELAND

Taking into account the estimate of the volume of recreational anglers as presented in Section 3.2 and the expenditure information recorded in respect of recreational anglers, this section of the report presents an estimate of the value of recreational angling in Ireland in terms of expenditure.

### 3.6.1 Domestic Angler Expenditure on Recreational Angling

There are two sources for calculating average annual spend for domestic anglers:

<u>Source A</u>

Firstly, as indicated in Section 3.4, average per person expenditure for Republic of Ireland anglers for the trip under review was €178. Taking into account the average number of trips taken during the past 12 months by Republic of Ireland anglers (8.28), average annual spend using this source can be estimated at €1,473.

<u>Source B</u>

As previously indicated in Figure 3.8, annual average per person expenditure on fishing by Republic of Ireland anglers can be estimated at €1,974. This source includes fixed or overhead expenses such as salmon licences, boats, engines, some tackle, etc which is not covered in source A.

An estimated 252,000 individuals from the Republic of Ireland participated in recreational angling in Ireland in 2012. This represents 7% of the adult population aged 15+. Taking the average expenditure calculations as presented above, total direct expenditure on recreational angling by Republic of Ireland anglers in 2012 is estimated to range from €371 million to €497 million.

**Figure 3.10 – Domestic Angler Expenditure on Recreational Angling**

| | Range | |
|---|---|---|
| | Source A | Source B |
| Number of Recreational Anglers in 2012 (7% of population) | 252,000 | 252,000 |
| Annual Expenditure on Angling | €1,473 | €1,974 |
| Total Expenditure in 2012 | €371 million | €497 million |

Source: Millward Brown Lansdowne

### Northern Ireland Angler Expenditure on Recreational Angling

In 2012, an estimated 41,000 visits/trips were made by Northern Ireland individuals participating in recreational angling in Ireland. These individuals spent €360 per trip. Total expenditure on recreational angling in the Republic of Ireland by Northern Ireland anglers in 2012 is estimated to be of the order of €14.6 million.

**Figure 3.11 – Northern Ireland Angler Expenditure on Recreational Angling**

| | |
|---|---|
| Number of recreational angling trips in the Republic of Ireland in 2012. | 40,600 |
| Average (Per Person) Expenditure per trip | €360 |
| Total Expenditure in ROI in 2012 | €14.6 million |

Source: Failte Ireland

### 3.6.2 Overseas Angler Expenditure on Recreational Angling

There are also two sources for calculating the value of annual expenditure on recreational angling by overseas anglers:

Source A

Firstly, the Fáilte Ireland *Survey of Travellers* estimates that overseas anglers spent an average of €858 during their stay in Ireland in 2011.

Source B

From the *Survey of Recreational Anglers* undertaken in 2012, average per person expenditure recorded by overseas anglers when in Ireland was €1,027 (see Figure 3.7).

An estimated 113,000 overseas visitors participated in recreational angling in Ireland in 2012. Taking the expenditure calculations presented above, the total direct expenditure on recreational angling by overseas anglers in 2012 is estimated to range from €97 million to €116 million.

**Figure 3.12 – Overseas Angler Expenditure on Recreational Angling**

| | Range | |
|---|---|---|
| | Source A | Source B |
| Number of Recreational Angling Trips in Ireland in 2012 | 113,000 | 113,000 |
| Average (per person) Expenditure per trip | €858 | €1,027 |
| Total Expenditure in 2012 | €97 million | €116 million |

Source: Fáilte Ireland (Excludes expenditure on ferry/flight)

### Total Expenditure on Recreational Angling – All Anglers

In order to arrive at an estimate of total expenditure on recreational angling, we have assumed a mid-point in the expenditure ranges indicated in respect of domestic, Northern Ireland and overseas anglers. Therefore, the total direct expenditure on recreational angling in Ireland in 2012 by anglers from all markets is estimated to be of the order of €555 million [See Figure 3.13].

**Figure 3.13 – Total Angler Expenditure on Recreational Angling[5]**

| | Recreational Anglers in 2012 | Average Expenditure | Total Expenditure (2012) |
|---|---|---|---|
| Republic of Ireland | 252,000 | €1,723 | €434 million |
| Northern Ireland | 40,600 | €360 | €15 million |
| Overseas | 113,000 | €942 | €106 million |
| **Total** | **406,000** | | **€555 million** |

Source: Fáilte Ireland/Millward Brown Lansdowne

[5] Republic of Ireland and overseas angler expenditure estimates in Figure 3.13 are based on mid-point calculations. Estimates for Northern Ireland are based on the Survey of Recreational Anglers.

# 4

# The Economic Impact of Recreational Angling in Ireland

# 4. THE SOCIO-ECONOMIC IMPACT OF RECREATIONAL ANGLING

## 4.1 INDIRECT AND INDUCED IMPACTS

In this section we review the direct and indirect economic impact of recreational angling across Ireland. As highlighted in Figure 3.13, the value of both domestic and international (including Northern Ireland) expenditure was estimated to be €555 million. However, a portion of this spend is lost outside of Ireland due to it being spent on imported goods. Also a small proportion of the expenditure, especially by local anglers, on items such as food and drink, would have occurred even if these individuals were not on an angling trip. Adjusting for these leakages and displacement effects we estimate a net expenditure of €444 million.[6]

A composite multiplier was used to show the further economic value associated with additional local income and local supplier purchases. This composite multiplier accounts for the indirect impact of the expenditure of recreational anglers in Ireland (i.e. supply linkage multiplier due to angler purchases and further purchases associated with linked firms and individuals along the supply chain) and the induced impact associated with angler expenditure in Ireland as a result of those who derive incomes from the direct and supply linkage impacts of angler expenditure. Based on estimates from the CSO Input-Output Figures for Ireland and other sources, we estimate this composite multiplier to be 1.70. This figure in part reflects the high indirect impact multiplier of the hotel and catering industry which comprises a large element of the direct expenditure of the anglers in the *Survey of Recreational Anglers*.

**Figure 4.1 - Direct and Indirect Economic Impact**

| Gross Expenditure | € millions |
|---|---|
| Total Domestic Expenditure | 434 |
| Total International Expenditure (including NI) | 121 |
| Total Gross Expenditure for all visitors | 555 |
| **Net Expenditure** | |
| Leakages | 20% |
| Gross Expenditure minus leakages | 444 |
| Indirect and Induced Multiplier | 1.7 |
| Indirect Expenditure | 310.8 |
| **Total Net Expenditure in Country (Economic Impact)** | **754.8** |

Source: TDI

[6] Volume of anglers x Average spend = Gross expenditure
Gross expenditure – Leakage x Composite multiplier = Net expenditure

It should be noted that this multiplier effect will differ for domestic and overseas expenditure, as overseas visitors spend a higher proportion on accommodation and transport than domestic anglers (who make fewer overnights and spend less on transport and local produce) and so a bigger impact on local economy can be expected from overseas visitors.

It is evident from the results that recreational angling produces a high indirect impact; with direct spend of €555 million generating €311 million in indirect expenditure. The overall (direct and indirect) economic impact of recreational angling in Ireland is therefore estimated to be approximately €755 million.

## 4.2 EMPLOYMENT

According to Fáilte Ireland, €1 million of tourist spending supports 36 jobs. In arriving at an indicative assessment of employment supported by recreational angling in Ireland, the expenditure estimates presented in Figure 3.13 in respect of overseas anglers (€106 million) and Northern Ireland anglers (€15 million) can legitimately be classified as tourist spending.

Not all of the estimated €434 million in domestic recreational angling expenditure can be classified as 'tourist' spending however. To arrive at an estimate of domestic tourist angling expenditure, the volume of overnight trips needs to be taken into account. This is estimated at 277,000 domestic overnight trips (see Section 5.1.2). With an average spend per trip of €575 by those taking overnight trips (see Figure 3.3), domestic tourist angling expenditure can be estimated to be of the order of €159 million (or 37% of total domestic angling expenditure). Taking into account overseas and Northern Ireland expenditure, total tourist angling expenditure can be estimated at approximately €280 million.

**Figure 4.2 – Total Tourist Angling Expenditure[7]**

| | Total Expenditure (2012) |
|---|---|
| Republic of Ireland | €159 million |
| Northern Ireland | €15 million |
| Overseas | €106 million |
| **Total** | **€280 million** |

Source: Fáilte Ireland / Household survey

Therefore, applying the Fáilte Ireland formula of 36 jobs supported for every €1 million in tourist expenditure, recreational angling can be estimated to support approximately 10,000 jobs (based on 36 jobs per million in tourist expenditure).

[7] No provision has been made in this estimate for tourist expenditure arising from domestic day fishing trips, therefore the estimate represents a prudent estimate of total tourist expenditure

## 4.3 ESTIMATING THE NON-MARKET VALUE OF PRESERVING IRELAND'S FISH STOCKS

In both the *Household Survey* and the *Survey of Recreational Anglers*, the contingent valuation method was employed to estimate the value to the general public and to anglers, respectively, of preserving Ireland's natural fish stocks and the current quality of recreational angling in Ireland. The contingent valuation method (CVM) is a survey based stated preference technique which asks respondents directly to express their maximum willingness to pay (WTP) (or willingness to accept) for a hypothetical charge relating to a non-market good such as the quality of fish stocks and the angling experience. CVM defines the environmental goods and services as a bundle of different characteristics and seeks to elicit the WTP for the entirety of the bundle. A CVM study can be used, as in the case here, to estimate values that the public place on avoiding the deterioration in the quality of Ireland's natural fish stocks and angling experience in relation to the current situation without new policy.

CVM was incorporated into both survey instruments by asking additional questions in terms of individuals' willingness to pay towards the preservation of Ireland's natural fish stocks and the current quality of recreational angling in Ireland. A focus group was used to inform the CVM question design and to gauge the likely range of individuals' willingness to pay in order to inform the bid design of the main survey.

A total of 935 individuals in the *Household Survey* (47%) responded that they would be willing to pay a positive figure towards the preservation of the current fish stocks and current quality of recreational angling in Ireland. As expected a higher proportion of anglers in the *Survey of Recreational Anglers* were willing to pay a positive amount. In particular a total of 589 anglers (66%) responded that they would be willing to pay a positive figure towards the preservation of the current fish stocks and current quality of recreational angling in Ireland. In both cases a number of €0 WTP responses were treated as legitimate bids depending on the response to the follow-on question asking why the individual was willing to pay €0 if that was the bid amount chosen. Respondents choosing the €0 because they objected to paying taxes, or they perceived that the Government/Council/other body should pay, or they did not believe the stocks would be preserved or who stated that they could not give a legitimate reason why they were willing to pay €0 were excluded from the analysis. The reasons given for choosing the €0 bid value are summarized for both samples in Figure 4.3. The total final number of usable responses for estimating the value of preserving Ireland's fish stock in the *Household Survey* and the *Survey of Recreational Anglers* was 1684 and 602 respectively.

**Figure 4.3 - Reasons Given for Zero WTP Bids**

| Reason Given | % of €0 Responses in Household Survey | % of €0 Responses in Survey of Recreational Anglers |
|---|---|---|
| **Valid Reasons** | | |
| I cannot afford to pay | 39 | 3 |
| The quality of the fish stocks in Ireland are not important to me | 31 | 9 |
| **Invalid Reasons** | | |
| I object to paying taxes or pay too much tax already | 7 | 25 |
| The Government/Council/Other body should pay | 4 | 20 |
| I don't believe the improvements will actually take place | 8 | 18 |
| Don't know/Other reason | 11 | 25 |
| **Total % of €0 responses in each sample** | **53** | **34** |

Source: Survey of Recreational Anglers

The WTP responses in both samples were treated in a parametric model, where the WTP value chosen by each householder or angler was estimated as a function of the respondents' socio-economic characteristics.[8]

Using the model results it was possible to predict the average WTP for the general public and the population of anglers for preserving Ireland's natural fish stocks and the current quality of recreational angling in Ireland. The mean predicted WTP for the general population is estimated to be €15.97 per person per year. The mean predicted WTP for the angler population (based on the *Survey of Recreational Anglers* model) is estimated to be a much higher €66.52 per person per year. Interestingly, the predicted mean WTP for the subset of 138 anglers (those who declared they had fished in the previous 12 months or who were members of a fishing club) in the general public *Household Survey* was significantly less than in the *Survey of Recreational Anglers* and was estimated at €36.99.

[8] For a more detailed discussion of this modelling technique the interested reader should see Hynes, S., Campbell, D. and Howley, P. (2011). A Holistic vs. an Attribute-based Approach to Agri-Environmental Policy Valuation: Do Welfare Estimates Differ? *Journal of Agricultural Economics*, 62 (2): 305–329.

**Figure 4.4 - WTP Estimates for the 2 Alternative Models**

| Population | Average WTP Per Individual (€) | Total value of preserving fish stock and fishing experience quality (€) |
|---|---|---|
| General Population (including anglers) | 15.97 | 57,619,760 |
| Anglers Population | 66.52 | 27,007,120 |

Source: General Population estimates use the results of the *Household Survey* model whereas the angler population estimates use the results of the *Survey of Recreational Anglers* model.

In analysing aggregate WTP for preserving Ireland's natural fish stocks and the current quality of recreational angling in Ireland, we calculate the aggregate welfare value using the results of the CVM interval regression models outlined above where the estimated average value of WTP in both samples is multiplied by the respective general and angler populations. Therefore, the aggregate non-market value of the angling resource to the Irish public (where there are 3,608,000 individuals above the age of 15) is estimated to be €57.6 million per annum. The equivalent figure for the 406,000 estimated active anglers using Irish waters on a yearly basis is €27 million per annum. It should be noted that these 2 figures are not additive since the majority of the angler population estimate (which is derived from the *Survey of Recreational Anglers*) are a subset of the Irish population. Therefore, the figure of €57.6 million represents the total annual WTP of the Irish population (domestic anglers included).

# 5

# Angling Category


SIMMS
ORVIS

# 5. ANGLING CATEGORY

This section of the report examines the pattern of participation in recreational angling according to species. Where domestic angling is concerned, two different sources were drawn on in order to establish the category of angling engaged in by recreational anglers. Both the *Household Survey* and the *Survey of Recreational Anglers* included questions on this particular topic. Where Northern Ireland and Overseas recreational anglers are concerned, the source of information used on angling category is the *Survey of Recreational Anglers*.

## 5.1 REPUBLIC OF IRELAND

The *Household Survey* is the source for domestic recreational angler volume estimates. Attempts to establish the category of fishing engaged in based on the 131 (7% out of 2000 respondents) who claim to have fished in the past 12 months proved to be very difficult due to the small sample size but does provide at least some insight into domestic angling preferences.

### 5.1.1 Day Fishing Trips[9]

The 7% of the adult population who went fishing in the past 12 months equates to 252,000 individuals. 6.2% of the adult population (i.e. 223,000) participated in one or more **day fishing trips** in 2012. At an average of 13.61 trips each per year for all those who took day fishing trips, this amounts to an estimated 3 million day fishing trips.

The following question was asked in the *Household Survey* with a view to obtaining an insight into domestic angling participation patterns by category.

> *"I would like to ask you some questions about your day fishing trips. What type of species did you fish for on your day trips in the past 12 months?"*

A similar question was administered in respect of overnight fishing trips (see 5.1.2)

Figure 5.1 shows the species targeted in terms of participation. So, for example, 30% of domestic 'past 12 months' anglers indicated they had targeted brown trout on day fishing trips during the year. For salmon, and salmon and sea trout combined, the indicative levels of participation were 9% and 22% respectively. Using the indicative levels of participation as derived from the Household Survey, and applying the participation rates to the population who had participated in day fishing trips in 2012 (i.e. 223,000), it is possible to arrive at broad estimates of the number of anglers fishing for different species. So for example, an estimated 49,000 individuals had engaged in day fishing trips where salmon and sea trout combined were targeted. A further 20,000 engaged in day trips where salmon only were

[9] The trip information presented in 5.1.1 above is drawn from the *Household Survey*. The re-weighted trip data in Section 3.5 is drawn from the *Survey of Recreational Anglers*.

targeted. Therefore, combining the two categories of salmon (salmon only and salmon and sea trout combined), an estimated 69,000 undertook day fishing trips where salmon was the targeted species.

**Figure 5.1 – Species targeted on Day Fishing Trips in the Past 12 Months – Domestic Anglers**

| | Participation | Estimated Number of Anglers |
|---|---|---|
| Salmon Only | 9% | 20,000 |
| Salmon and Sea Trout Combined | 22% | 49,000 |
| Sea Trout Only | 10% | 22,000 |
| Brown Trout | 30% | 67,000 |
| Pike | 28% | 62,000 |
| Coarse (Excl Pike) | 19% | 42,000 |
| Bass | 10% | 33,000 |
| Sea Angling (Excl Bass) | 32% | 71,000 |

Source: Millward Brown Lansdowne/Household Survey

### 5.1.2 Overnight Fishing Trips

The *Household Survey* also provided an estimate of the number of adults taking any overnight fishing trip in the past 12 months. 1.5% of the adult population (54,000) participated in an **overnight** fishing trip in 2012. With an average of 5.25 trips for all those who made overnight fishing trips, this amounts to 283,500 overnight fishing trips. An average of 2.08 nights were spent on overnight trips resulting in an estimate of 589,680 domestic fishing nights. (In the *Survey of Angling Stakeholders*, the Average Length of Stay recorded for angling customers from the Republic of Ireland was 3.7 nights). The distribution of domestic overnight angling trips by region is shown in Section 7.1 of the report.

Figure 5.2 shows the species targeted by domestic anglers on overnight fishing trips. As an example, 42% of anglers who had participated in an overnight fishing trip in 2012 targeted sea fish (excluding Bass). This equates to an estimate of 22,000 individuals. In a similar vein, by combining the 2 categories of salmon (i.e. Salmon only and Salmon and Sea Trout Combined), an estimated 22,000 individuals also undertook overnight fishing trips where salmon was the targeted species.

**Figure 5.2 – Species targeted on Overnight Fishing Trips in the Past 12 Months – Domestic Anglers**

| | Participation* | Estimated Number of Anglers |
|---|---|---|
| Salmon Only | 12% | 6,000 |
| Salmon and Sea Trout Combined | 30% | 16,000 |
| Sea Trout Only | 18% | 10,000 |
| Brown Trout | 26% | 14,000 |
| Pike | 28% | 15,000 |
| Coarse (Excl Pike) | 31% | 17,000 |
| Bass | 20% | 11,000 |
| Sea Fish (Excl Bass) | 42% | 22,000 |

Source: Millward Brown Lansdowne/Household Survey Total Domestic Overnight Trips in 2012: 277,000. * Participation based on those undertaking overnight fishing trips in past 12 months.

### 5.1.3 Overall Estimate of Domestic Anglers by Angling Category

In examining findings recorded from the Household Survey in respect of day fishing trips and overnight trips, it is possible to obtain an understanding of the pattern of domestic recreational angling in terms of species targeted. So for example, an overall estimate of the number of domestic salmon anglers could be between 69,000 and 91,000 (the sum of those taking day and overnight trips – see Figures 5.1 and 5.2 respectively) depending on the level of duplication between anglers making day fishing trips and those taking overnight trips.

Figure 5.3 sets out domestic recreational angler volume estimates by category, including indicative minimum and maximum ranges.

**Figure 5.3 - Domestic Recreational Anglers – Volume Estimates by Category[10]**

| | Anglers on Day Fishing Trips | Anglers on Overnight Fishing Trips | Range | |
|---|---|---|---|---|
| | | | Minimum | Maximum |
| Any Salmon* | 69,000 | 22,000 | 69,000 | 91,000 |
| Sea Trout Only | 22,000 | 10,000 | 22,000 | 32,000 |
| Brown Trout | 67,000 | 14,000 | 67,000 | 81,000 |
| Pike | 62,000 | 15,000 | 62,000 | 77,000 |
| Coarse (Excl Pike) | 42,000 | 17,000 | 42,000 | 59,000 |
| Bass | 33,000 | 11,000 | 33,000 | 44,000 |
| Sea Fish (Excl Bass) | 71,000 | 22,000 | 71,000 | 93,000 |

Source: Millward Brown Lansdowne/Household Survey * Salmon only and Salmon and Sea Trout Combined

[10] The volume information in respect of the number of fishing trips by different categories of anglers are estimates. Caution should be exercised due to the small sample of anglers upon which these estimates are based. (i.e. 131 individuals out of a sample of 2,000 – *Household Survey*).

The *Survey of Recreational Anglers* also recorded information on angling participation by angling category (Main Quarry). Figure 5.4 below presents the levels of participation in different categories of angling by domestic recreational anglers, based on a sample of 520 domestic anglers within the survey sample. While this is a robust one, it cannot be assumed that the sample is entirely representative of angling activity and devoid of bias. The location and timing of interviews is likely to have had an impact on the categories of anglers identified. Anglers were categorised according to where they were interviewed. Anglers also mentioned other species they had targeted.

The categorisation of anglers in the *Survey of Recreational Anglers* was predetermined at the sampling stage through the selection of specific angling locations. At the outset of the project, TDI prepared a Master Sampling Frame with 50 interviewing locations selected. The interviewing locations were chosen with a view to providing coverage of game, coarse and sea fishing. Therefore, each interviewing location (sampling point) was categorized as salmon/sea trout, bass/sea or coarse/pike as appropriate. Therefore all interviews conducted with anglers at a particular location/sampling point matched the categorisation as set out in the sampling approach.

At the interview stage, the category/species of fish targeted on the day was also recorded. A significant proportion of anglers were fishing for more than one species (e.g. salmon and sea trout or bass and other sea fish). Therefore in the analysis by category presented below and in subsequent sections, a number of anglers have been categorised under more than one heading (i.e. bass and other sea fish).

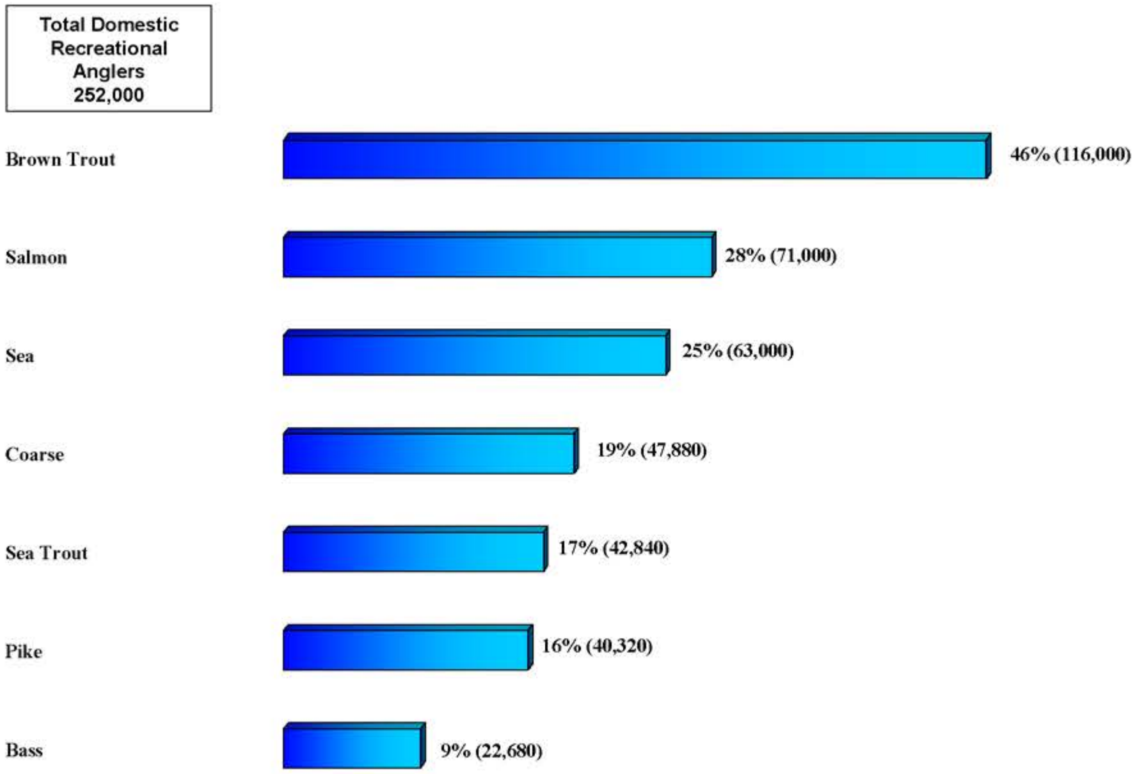
When the respective levels of participation in different categories of angling as identified in the *Survey of Recreational Anglers* are applied to the population of domestic recreational anglers (252,000), the following pattern is evident:

- The volume estimates for domestic **salmon** anglers (71,000) ie almost identical to the estimates derived from the *Household Survey*.

- The volume estimates for domestic **brown trout** anglers, **sea trout**, and **coarse**, are higher in the *Survey of Recreational Anglers* which implies that these particular categories of anglers may have been over-represented in the *Survey of Recreational Anglers*.

- The volume of domestic **Sea** anglers, **Bass** and **Pike** anglers recorded in the *Survey of Recreational Anglers* are lower than the corresponding volumes derived from the *Household Survey* which implies that the latter three categories may have been under-represented in the *Survey of Recreational Anglers*.

**Figure 5.4 – Domestic Angler Participation in Recreational Angling x Category[11]**




Source: Survey of Recreational Anglers

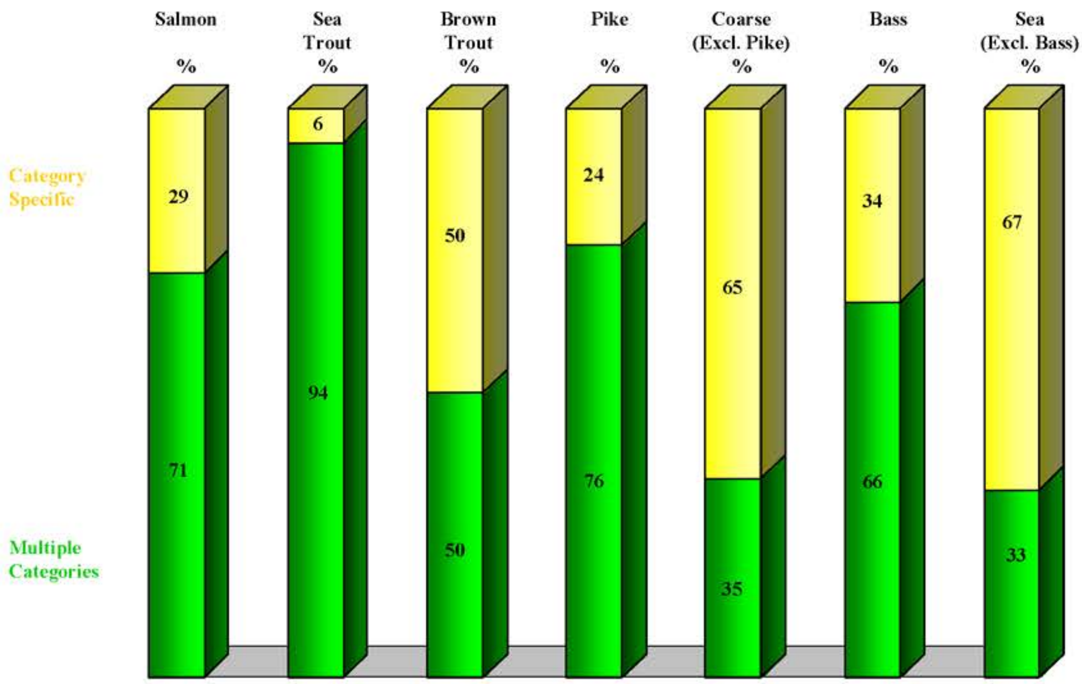
The sum of angler categories as represented in Figure 5.4 above exceeds 252,000 (i.e. total domestic recreational anglers) due to the fact that many domestic anglers fish for more than one species (see 5.1.4).

[11] The sum of angling categories exceeds 252,000 due to the fact that many domestic anglers fish for more than one category/species.

### 5.1.4 Understanding Domestic Recreational Angling Patterns

The robust sample of 520 domestic anglers achieved in the *Survey of Recreational Anglers* allows for an analysis of angling patterns in respect of different categories of anglers. As previously indicated, high proportions of domestic recreational anglers are engaged in fishing for more than one species.

**Figure 5.5 – Domestic Recreational Anglers – Category Specific Vs Multiple Category**




Source: Survey of Recreational Anglers

Of the 190 domestic salmon anglers interviewed in the *Survey of Recreational Anglers*, less than one third (29%) were engaged in fishing for salmon only. By applying this proportion to the estimate of domestic salmon anglers, it can be deduced that there are approximately 21,000 'salmon only' anglers in the country and a further 50,000 individuals who were engaged in fishing for salmon and other species or categories of fish.

In contrast to salmon, sea trout, pike and bass anglers the majority of coarse and sea anglers tend to be category specific.

The following patterns are evident amongst those engaged in fishing for more than one species/category:

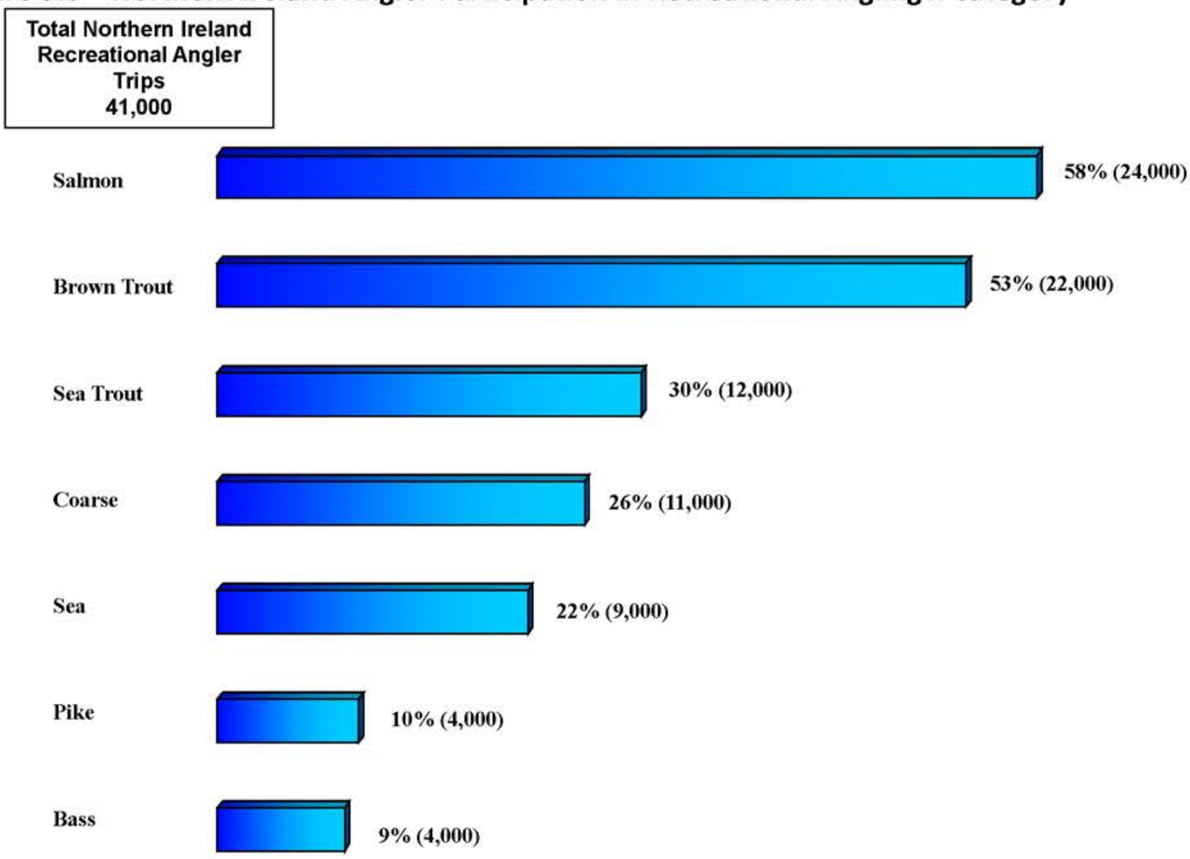
- **Salmon** – A majority of 'multiple category' domestic salmon anglers also fish for brown trout and sea trout. One in five (22%) also fish for pike.

- **Sea Trout** – The majority (94%) of domestic sea trout anglers are also engaged in salmon and brown trout angling.
- **Brown Trout** – Apart from a preference for the other game species, 20% of domestic brown trout anglers also fish for pike.
- **Pike** – Amongst domestic pike anglers, just over half (59%) are also engaged in fishing for brown trout.
- **Coarse** – While a majority of domestic coarse anglers are 'category specific', amongst the minority involved in fishing for multiple categories, participation is spread across a wide range of species.
- **Sea/Bass** – A similar pattern is evident with 'multiple category' sea/bass anglers engaged in a wide variety of fishing

## 5.2 NORTHERN IRELAND

The *Survey of Recreational Anglers* comprised interviews with 93 recreational anglers from Northern Ireland within the overall sample of 903 (i.e. 10%). The levels of participation in different categories of angling by Northern Ireland anglers are presented in Figure 5.6 below. When the respective levels of participation are applied to the estimated 41,000 angling visits made by recreational anglers from Northern Ireland, indicative volume estimates can be established by category. Therefore, based on this source, it can be estimated approximately 24,000 trips were made by Northern Ireland anglers where salmon was the preferred target species while 22,000 trips were made where brown trout was the preferred target species. The sum of trips by different categories of anglers exceeds 41,000 due to the fact that many anglers fished for more than one category of fish.

**Figure 5.6 – Northern Ireland Angler Participation in Recreational Angling x Category**

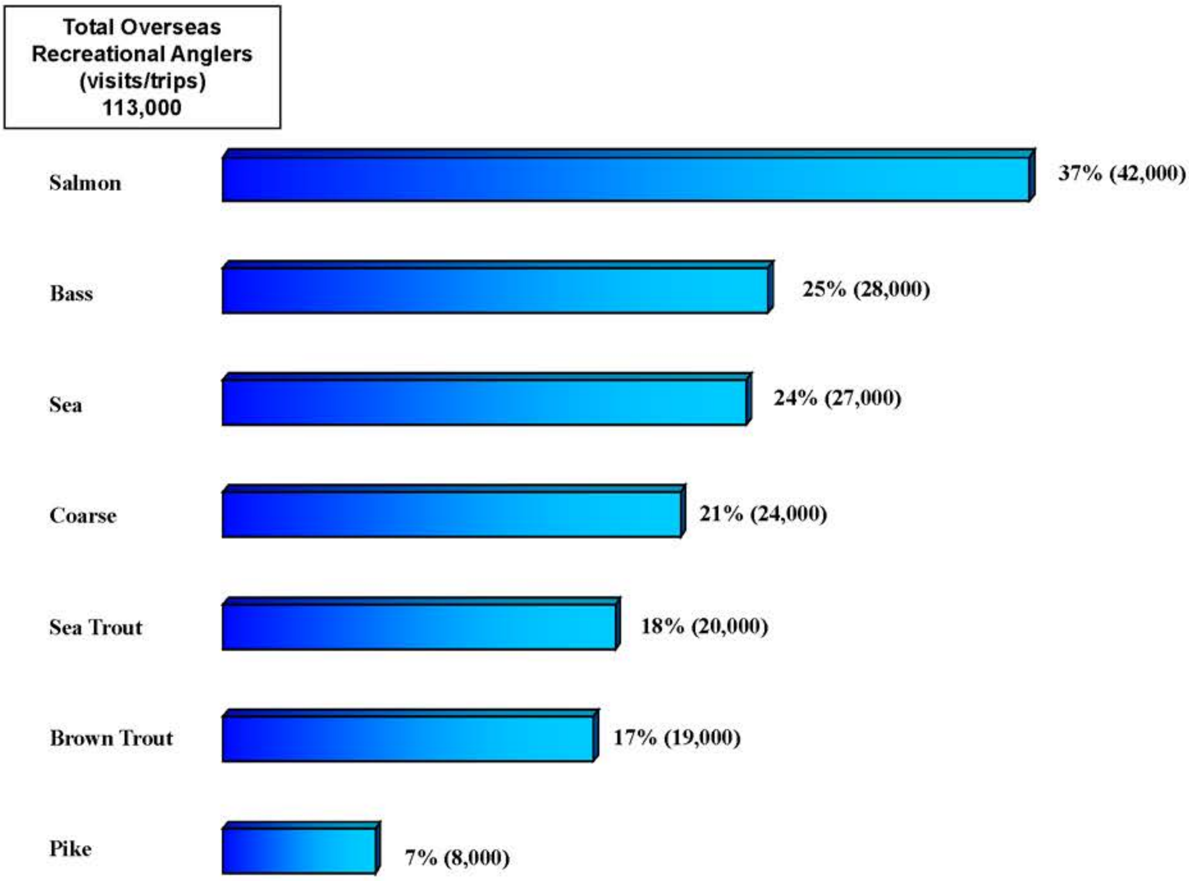



Source: Survey of Recreational Anglers

## 5.3 OVERSEAS

A total of 290 individuals from overseas were interviewed in the *Survey of Recreational Anglers*. The levels of participation in different categories of angling engaged in by overseas anglers are presented in Figure 5.7 below. When the respective participation rates are applied to the estimated 113,000 overseas recreational anglers (angler visits/trips), indicative volume estimates can be established by category.

**Figure 5.7 – Overseas Angler Participation in Recreational Angling x category**




Source: Survey of Recreational Anglers/Fáilte Ireland (2011)

## 5.4 INCIDENCE OF TARGETING MULTIPLE SPECIES – ALL RECREATIONAL ANGLERS

Figure 5.8 below indicates the incidence of targeting multiple species by **all** recreational anglers. The Figure shows the species targeted by all anglers and the pattern in respect of each angling category. The information in 5.8 is sourced from the *Survey of Recreational Anglers*.

Amongst all anglers (domestic, Northern Ireland and overseas), 38% of respondents targeted brown trout, 34% targeted salmon and 19% targeted sea trout. Other species targeted by the total sample are also indicated. The second column indicates the patterns of salmon anglers, 53% of whom also target brown trout with 46% targeting sea trout.

In a similar vein, 49% of brown trout anglers also target salmon while just over one third (35%) target sea trout.

**Figure 5.8 Incidence of Targeting Multiple Species – All Recreational Anglers**

| Quarry Type | Angler Type | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Total | Salmon | Sea Trout | Brown Trout | Pike | Coarse | Bass | Sea |
| Salmon | 34% | 100% | 85% | 49% | 34% | 14% | 21% | 11% |
| Sea Trout | 19% | 46% | 100% | 35% | 26% | 9% | 22% | 11% |
| Brown Trout | 38% | 53% | 69% | 100% | 49% | 17% | 13% | 12% |
| Pike | 12% | 12% | 17% | 16% | 100% | 24% | 9% | 10% |
| Coarse | 20% | 8% | 10% | 9% | 39% | 100% | 7% | 7% |
| Bass | 14% | 9% | 17% | 5% | 11% | 5% | 100% | 29% |
| Sea | 24% | 8% | 15% | 8% | 20% | 8% | 50% | 100% |

Source: Survey of Recreational Anglers

# 6

# Profile & Characteristics of Recreational Anglers

# 6. PROFILE AND CHARACTERISTICS OF RECREATIONAL ANGLERS

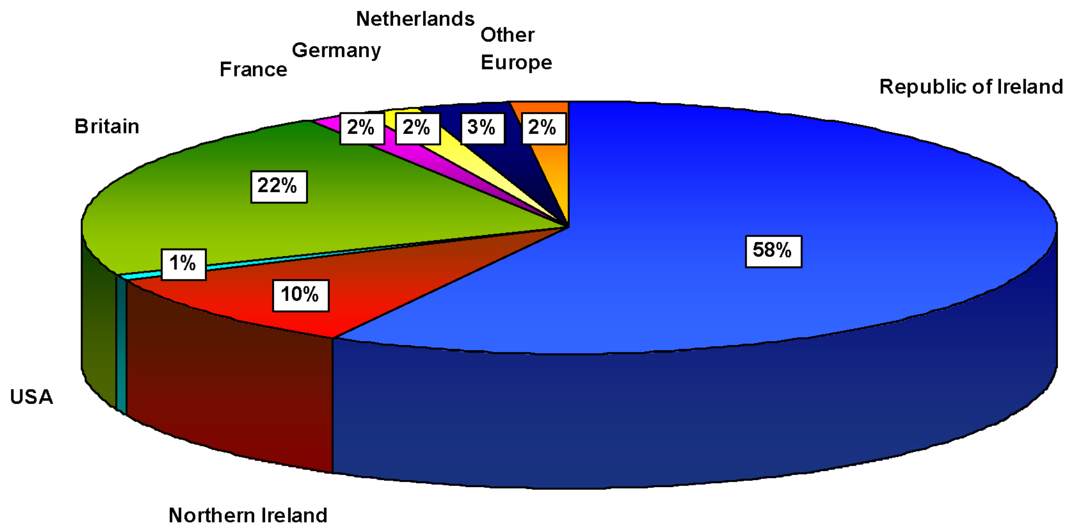
In arriving at the overall volume estimates for recreational angling in Ireland, Section 3.1 sets out details of the broad market profile for recreational anglers. This section of the report examines market profile and other angler characteristics in more detail.

## 6.1 MARKET PROFILE

Of the estimated 406,000 recreational anglers in Ireland, an estimated 62% (252,000) were from the domestic market, 28% (113,000) were from overseas markets and the balance 10% (40,600) originated from Northern Ireland.

The market profile as reported above and in Section 3.1 is broadly similar to the sample breakdown in terms of the proportions of domestic , Northern Ireland and overseas anglers as recorded in the *Survey of Recreational Anglers*. The latter survey is an ideal vehicle for profiling angler characteristics and their trips.

**Figure 6.1 – Country of Residence**




Source: Survey of Recreational Anglers

Irish anglers account for more than two thirds of the sample (68%). The majority of anglers (58%) are from the Republic while 10% are resident in Northern Ireland. Overseas anglers, which account for almost one third of the sample (32%), are dominated by visitors from Britain – overall they account for more than one in five (22%) of the total sample. Anglers from Europe (9%) and North America (1%) make up the balance.

As this market breakdown is based on a sub-sample of 290 overseas anglers, a lower level of statistical reliability should be applied to this result than results based on the full survey sample of 903 interviews. The market breakdown as represented in Figure 6.1 reflects the profile of recreational anglers in 2012. Due to the limitations of the sample of overseas anglers (i.e 290), this market breakdown can be taken as broadly indicative of the market profile of overseas recreational anglers. There is evidence from Fáilte Ireland *Survey of Travellers* that the profile of overseas Recreational Anglers has been the subject of fluctuation from year to year.

Figure 6.2 below presents a profile comparison (by market) of recreational anglers in Ireland. Overall, the market profile of recreational anglers derived from a combination of the *Household Survey* and the Fáilte Ireland *Survey of Travellers* is broadly comparable to the market profile recorded in the *Survey of Recreational Anglers*.

**Figure 6.2 – Recreational Anglers – Profile Comparison x Market**

| | Combined Sources<br>% | Survey of Recreational Anglers<br>% |
|---|---|---|
| Republic of Ireland | 62 | 58 |
| Northern Ireland | 10 | 10 |
| Britain | 13 | 22 |
| Mainland Europe | 13 | 8 |
| *France* | *3* | *2* |
| *Germany* | *3* | *2* |
| *Other Europe* | *7* | *4* |
| North America | 1 | 1 |
| Other Overseas | 1 | <1 |
| | **100** | **100** |

Source: Survey of Recreational Anglers/Fáilte Ireland/Millward Brown Lansdowne

The main variation in market profile concerns the relative proportions of British and European Anglers. Two important factors should be taken in to account when making comparisons. Firstly, the combined sources profile is based on the most recent Fáilte Ireland *Survey of Travellers* (2011), a different year to when the TDI *Survey of Anglers* was conducted. Secondly, based on the three most recent instalments of the Fáilte Ireland *Survey of Travellers* the profile of overseas anglers has tended to fluctuate.

For example, in 2010, British anglers accounted for a significantly higher share of overseas anglers (57%) than those from mainland Europe (36%). In 2009, however, similar to 2011, the Fáilte Ireland survey recorded British and European anglers in broadly similar proportions[12].

The estimates of the value and economic impact of recreational angling presented earlier in this report are based on the volume estimates for domestic and overseas angling derived from the combined sources of the *Household Survey* and the Fáilte Ireland *Survey of*

[12] The year to year fluctuations in the market profile of overseas anglers can be attributed to the small sub-sample of anglers within the Fáilte Ireland *Survey of Travellers*.

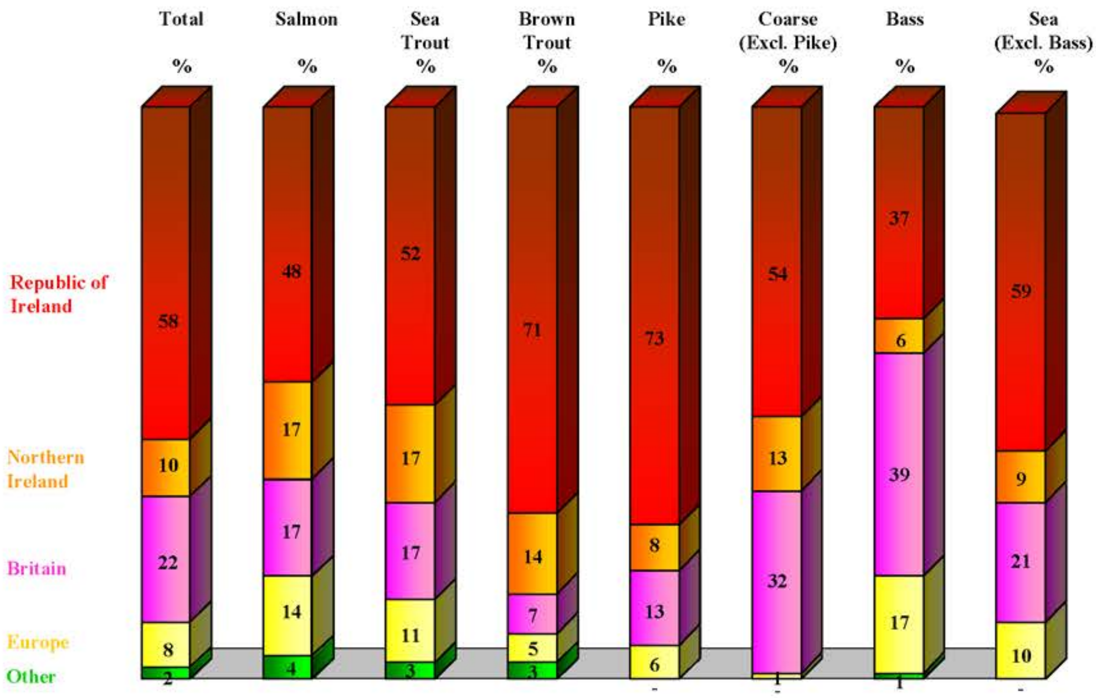
*Travellers.* As an aggregate expenditure figure for overseas recreational anglers was applied, the market variations referred to above are not relevant to the estimate prepared in respect of the economic value of overseas recreational angling.

## 6.2 COUNTRY OF RESIDENCE BY ANGLING CATEGORY

Significant variations are evident in the profile of recreational anglers according to angling category. As previously indicated, the profile of anglers by angling category is strongly influenced by the choice of sampling locations for the *Survey of Recreational Anglers*. Where bass and salmon are concerned, a majority of anglers were from out of state. The British market is particularly important where bass angling and coarse angling is concerned with individuals from this market accounting for four in ten (39%) anglers and three in ten (32%) anglers respectively.

Sea trout, coarse and sea angling also attract high levels of out-of-state participation with Northern Ireland and overseas anglers accounting for a minimum of four in ten anglers in each case. Brown trout and pike anglers are predominantly from the domestic market.

**Figure 6.3 – Country of Residence x Category**




Source: Survey of Recreational Anglers

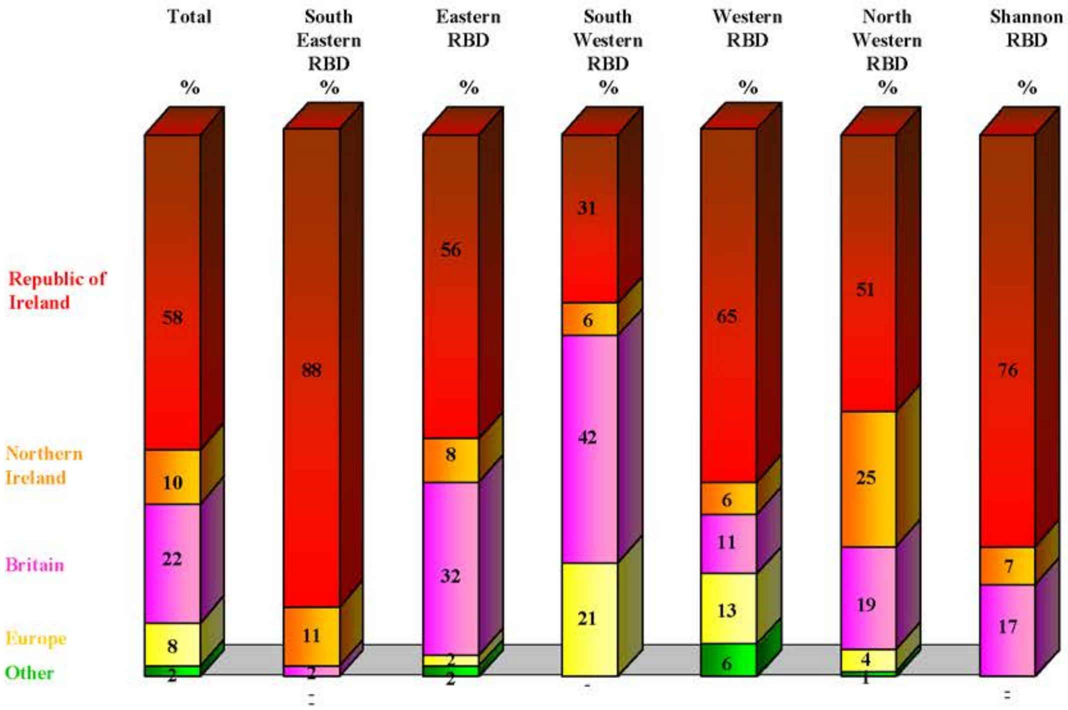
## 6.3 COUNTRY OF RESIDENCE BY RBD

Reflecting the overall pattern of angling activity the profile of recreational anglers varies quite significantly across each of the River Basin Districts (RBD). For further details on River Basin Districts, see Glossary and Appendix B.

The South Eastern RBD, the Shannon RBD and to a lesser extent, the Western RBD are heavily reliant on domestic recreational anglers. The Eastern RBD and North Western RBD attract domestic and out-of-state anglers in more or less equal proportions.

In contrast to the market profile recorded in respect of the other RBDs, an outright majority of anglers (approaching seven in ten – 69%) in the South Western RBD were from out-of-state markets, with 42% originating from Britain. However, after Dublin, the South West region attracts the highest number of overseas visitors of any region so the high numbers of angling tourists visiting this region is to be expected.

**Figure 6.4 – Country of Residence x RBD**




Source: Survey of Recreational Anglers

The Western RBD attracts the highest proportion (6%) of anglers from 'other' markets including the United States.

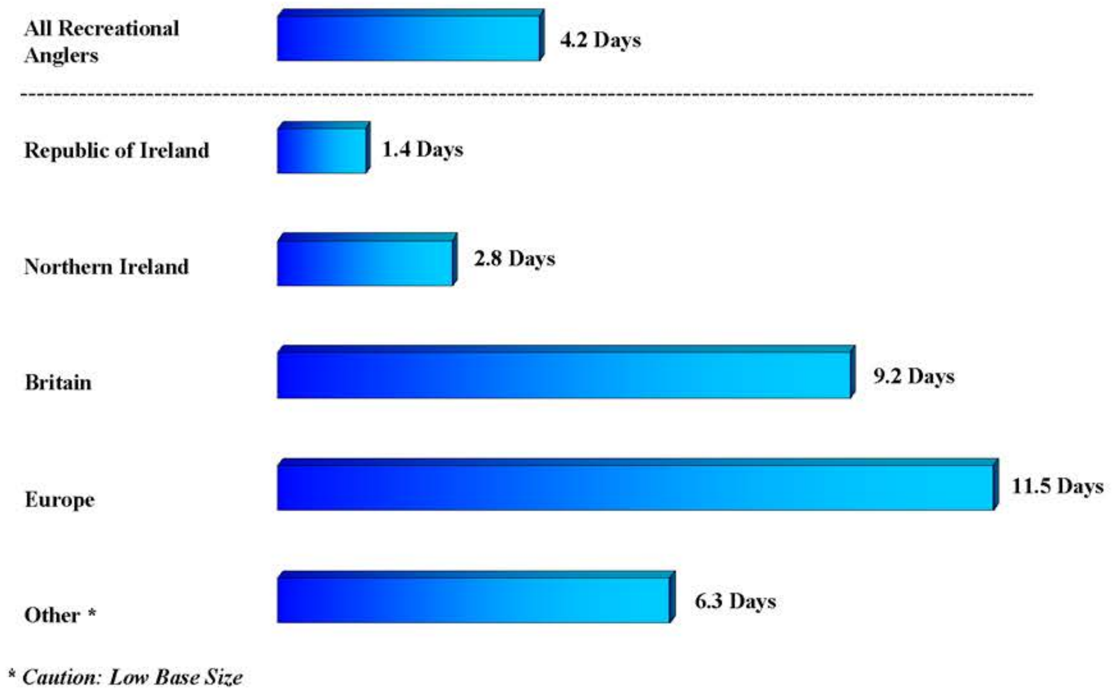
Given its close proximity, it is not surprising that one in four anglers (25%) to the North Western RBD are from Northern Ireland.

## 6.4 LENGTH OF STAY

The average length of stay of recreational anglers varies significantly according to market. Taking all markets into account, recreational anglers spend just over 4 days (4.2) (based on the evidence for the trip under review). **Average length of stay** varies from 1.4 days in the case of domestic recreational anglers to 11.5 days where European anglers are concerned.

The average length of stay information presented below in respect of Republic of Ireland and Northern Ireland anglers includes day trips made.

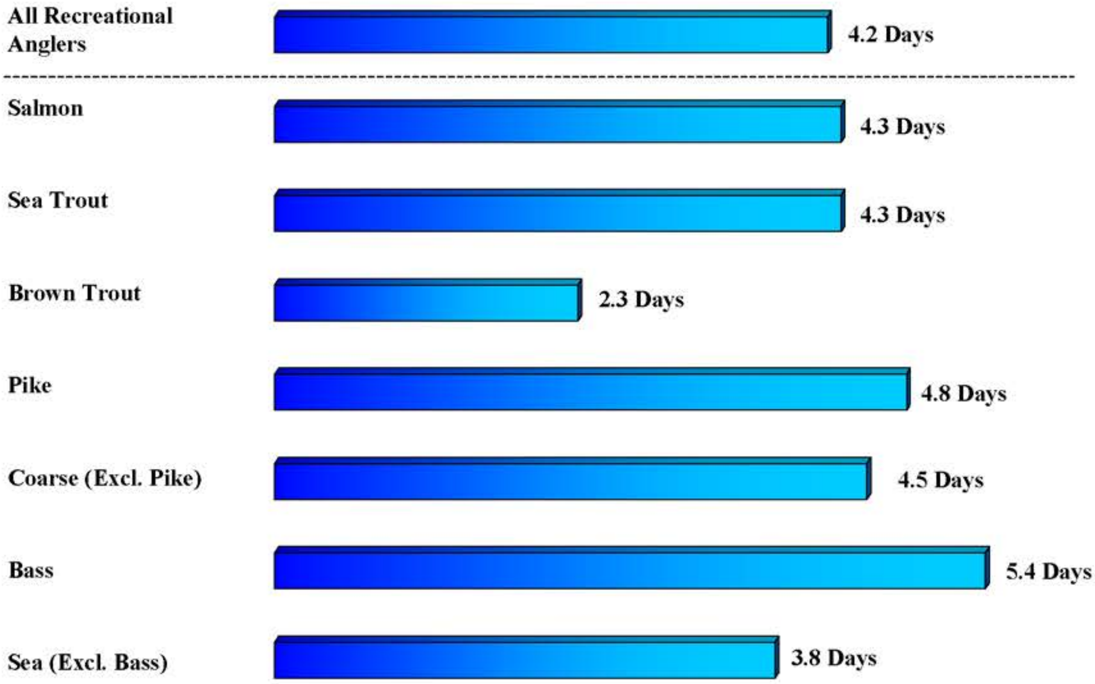
**Figure 6.5 – Average Length of Stay x Market**




Source: Survey of Recreational Anglers

Average length of stay according to category of recreational anglers ranges from a high of 5.4 days for pike anglers to a low of 2.3 days where brown trout anglers are concerned.

**Figure 6.6 – Average Length of Stay x Category**

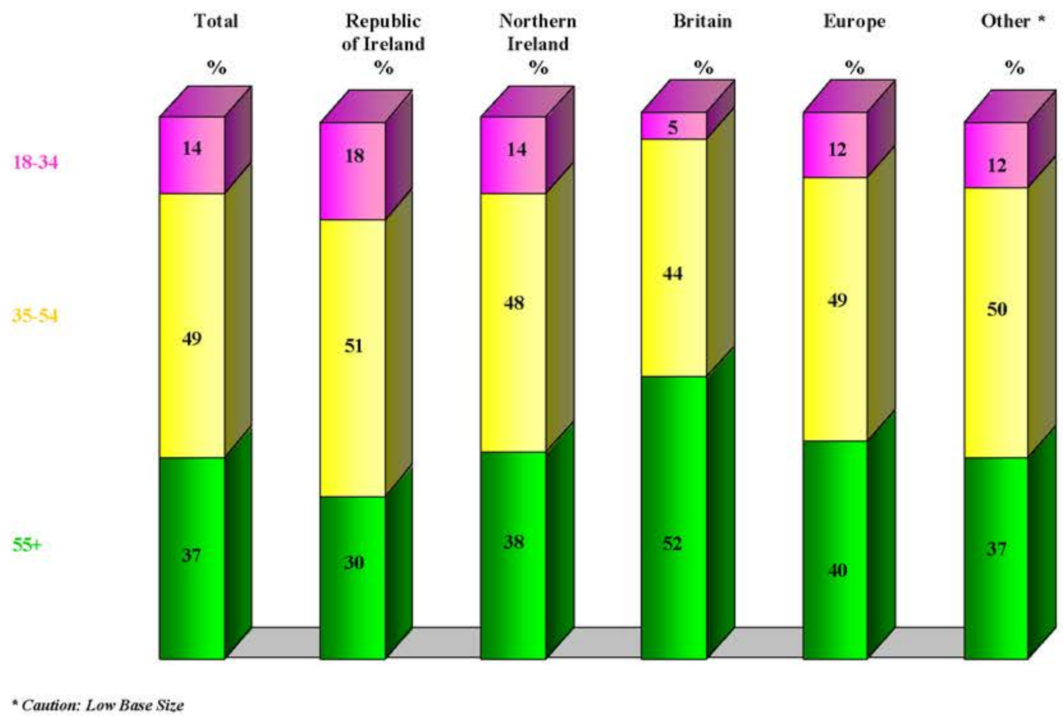



The average length of stay information presented in Figure 6.6 above includes day trips made.

## 6.5 AGE

Almost half (49%) of all anglers fall into the 35-54 age group. Only one in seven anglers (14%) are aged 18-34. By contrast, the age profile of overseas holidaymakers to Ireland is a lot younger. 44% of overseas holidaymakers are age 35 or under (Fáilte Ireland Tourism Facts 2011) compared to just 7% of all overseas anglers in the *Survey of Recreational Anglers.*

**Figure 6.7 – Age x Country of Residence**



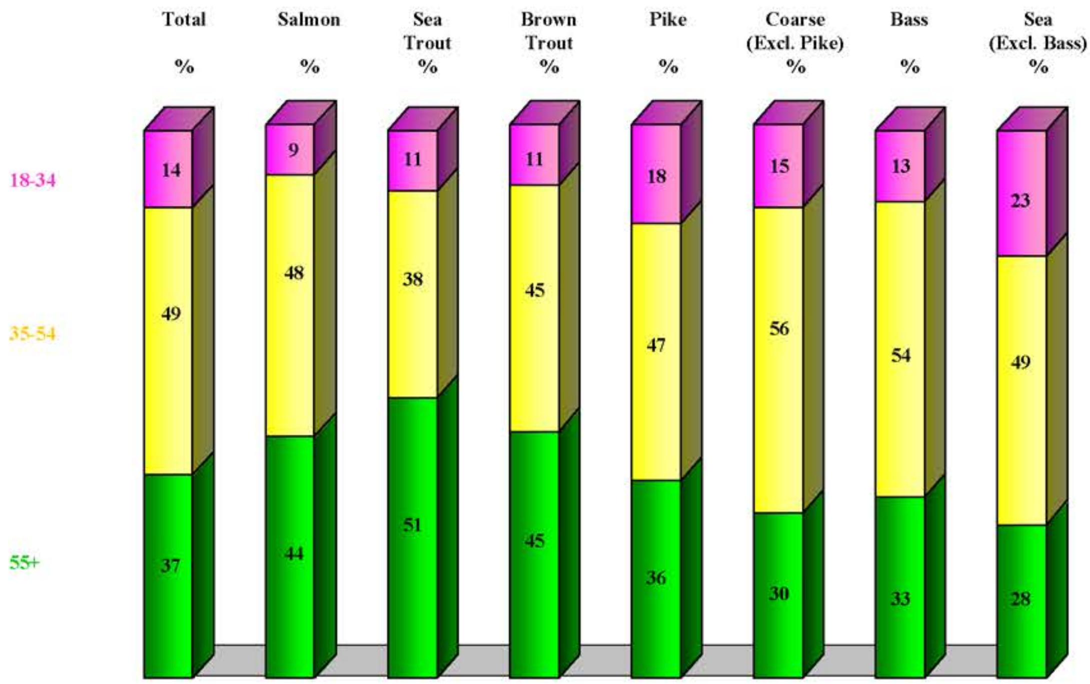

Source: Survey of Recreational Anglers

The age profile of the UK angler is older than that recorded in respect of other markets, with more than half (52%) falling into the 55+ age group (compared to 40% of European anglers and 37% of anglers from 'other' markets who fall into this age cohort).

The age profile of domestic anglers is younger than overseas anglers. The older age profile of overseas recreational anglers is a factor impacting on the high levels of disposable income and trip expenditure in Ireland.

Sea angling had the highest proportion of anglers in the 18-34 age category (23%), whereas bass and coarse angling had the highest proportion of anglers who are middle aged – 56% are aged between 35 and 54. Game angling had the oldest age profile with nearly half of salmon/sea trout/brown trout anglers falling into the 55+ age cohort.

**Figure 6.8 – Age x Category**



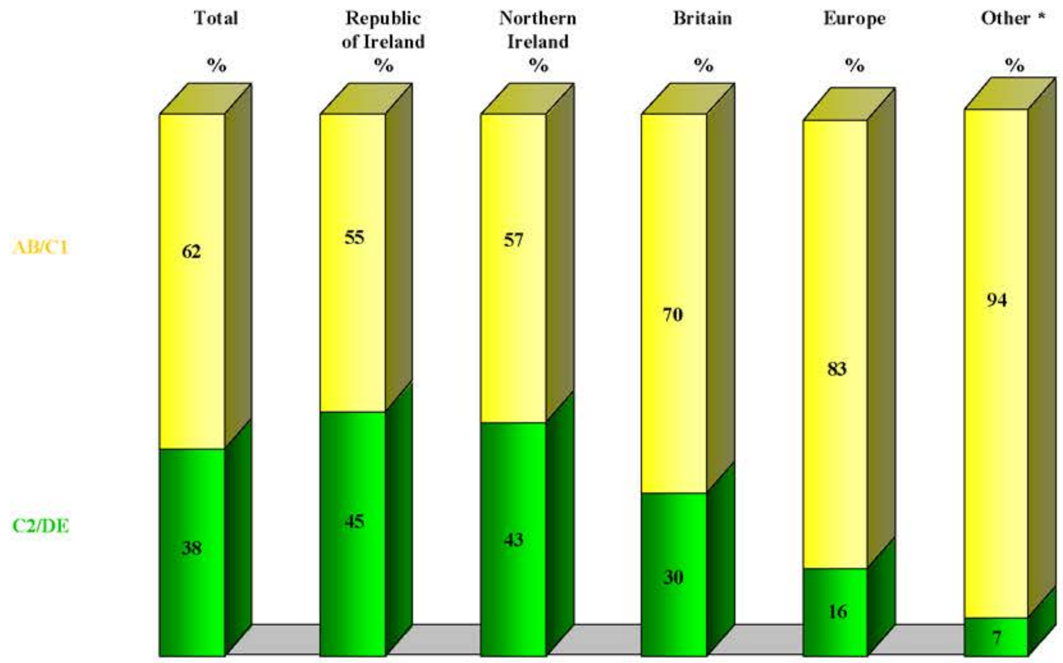

Source: Survey of Recreational Anglers

With almost one fifth (18%) under the age of 35, the age profile of pike anglers is the youngest of all angling categories surveyed.

## 6.6 OCCUPATION

The pre-dominant social class of recreational anglers is ABC1, with 62% of all respondents interviewed falling into this group. 38% of respondents were from C2DE socio-economic backgrounds. Three in every four (75%) overseas visitors are ABC1 – this compares with 85% of holidaymakers to Ireland in general (Fáilte Ireland Tourism Facts 2011).

**Figure 6.9 – Occupation x Country of Residence**



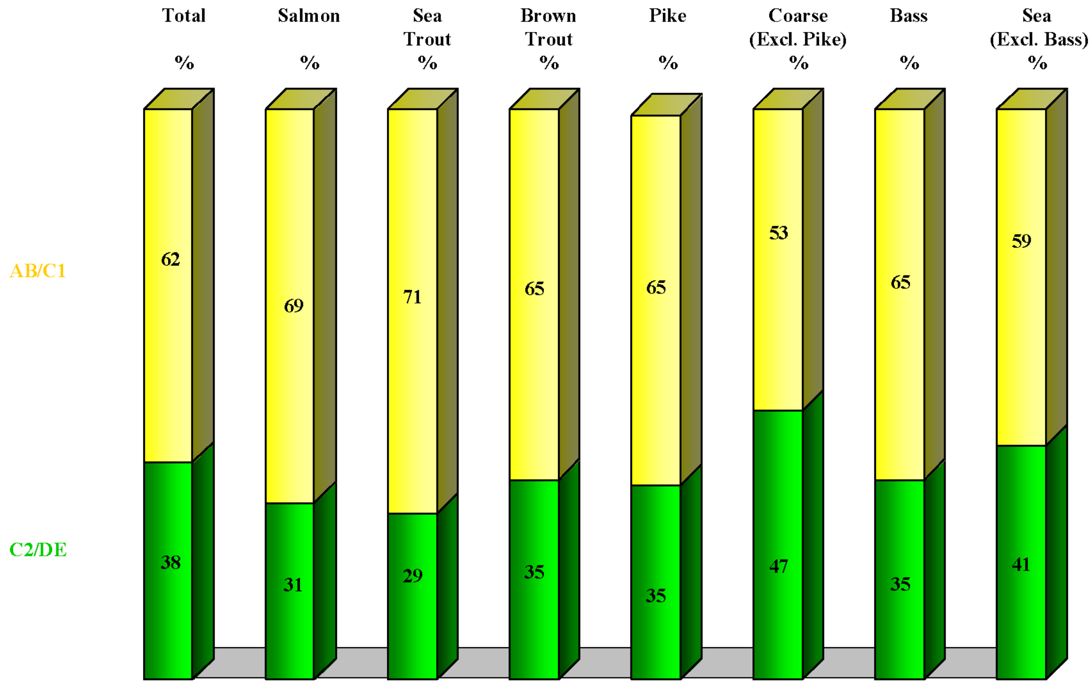

** Caution: Low Base Size*

Source: Survey of Recreational Anglers

Allowing for the cost of travel allied to other angling trip expenses, it is perhaps not altogether surprising that higher proportions of overseas anglers were from ABC socio-economic backgrounds when compared with their domestic and Northern Ireland counterparts.

Those participating in angling for salmon and sea trout are even more likely to be social class ABC1 (69% and 71% respectively), whereas coarse anglers have a much higher proportion of anglers in the C2DEs social class (47%).

**Figure 6.10 – Occupation x Category**




Source: Survey of Recreational Anglers

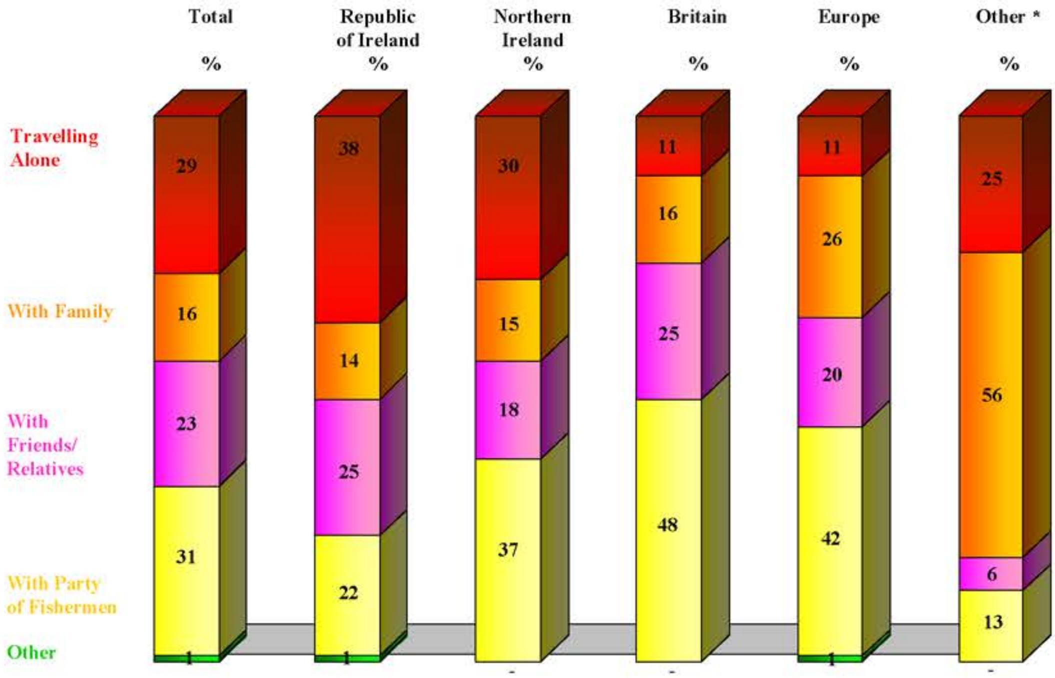
Where social classification is concerned, identical demographics are recorded for brown trout, pike and bass anglers; a 65% 35% split between class ABC1 and class C2DE (Figure 6.10).

## 6.7 PARTY COMPOSITION AND SIZE

### 6.7.1 Party Composition

Just under one third of anglers travel alone (29%) while similar proportions of anglers (31%) travel with a party of anglers. Anglers from Northern Ireland, Britain and Europe are most likely to travel with a party of anglers. Long haul anglers prefer to travel with family (56%).

**Figure 6.11 – Party Composition x Country of Residence**




** Caution: Low Base Size*

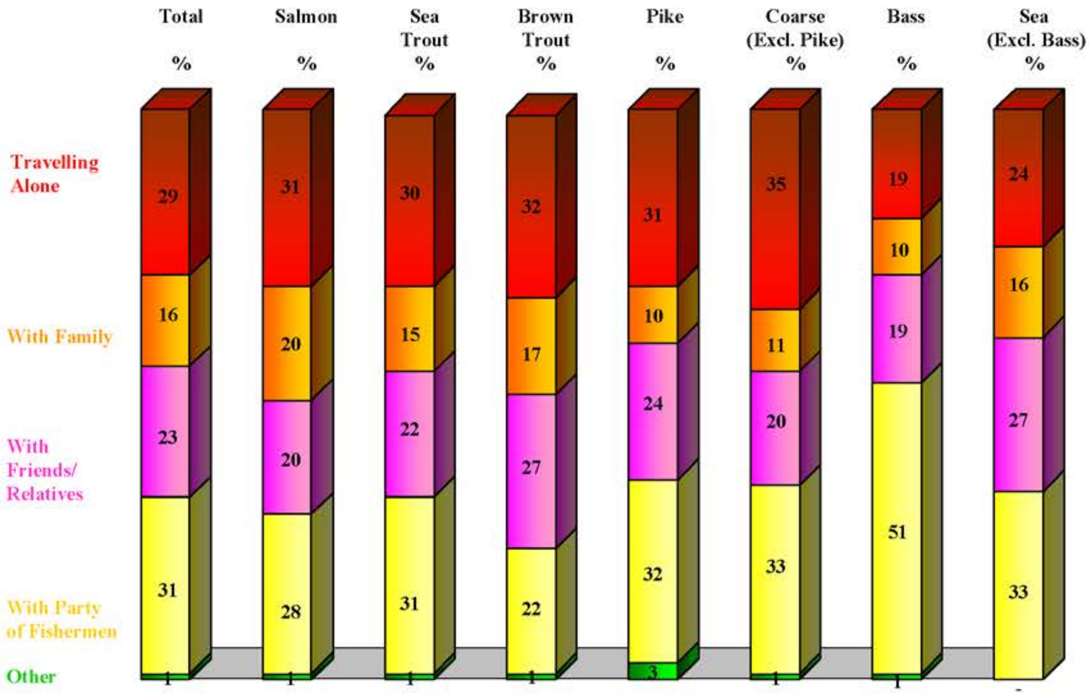
Source: Survey of Recreational Anglers

46% of European anglers and 41% of British anglers travelled with family and friends, with angling activities being combined with other holiday experiences. Interestingly, 23% of all overseas visitors to Ireland travelled alone (Fáilte Ireland Tourism Facts 2011).

It is clear that the travel patterns in terms of party composition vary quite significantly with four distinct groupings of cohorts as represented in Figure 6.9 above. This diversity in the manner in which anglers pursue their sport needs to be taken into account in the design and delivery of marketing and services to anglers.

Party composition does not vary significantly by angling category. The only variance was with respect to bass anglers, 51% of whom travelled with other fishermen (compared with 31% for all anglers).

**Figure 6.12 – Party Composition x Category**

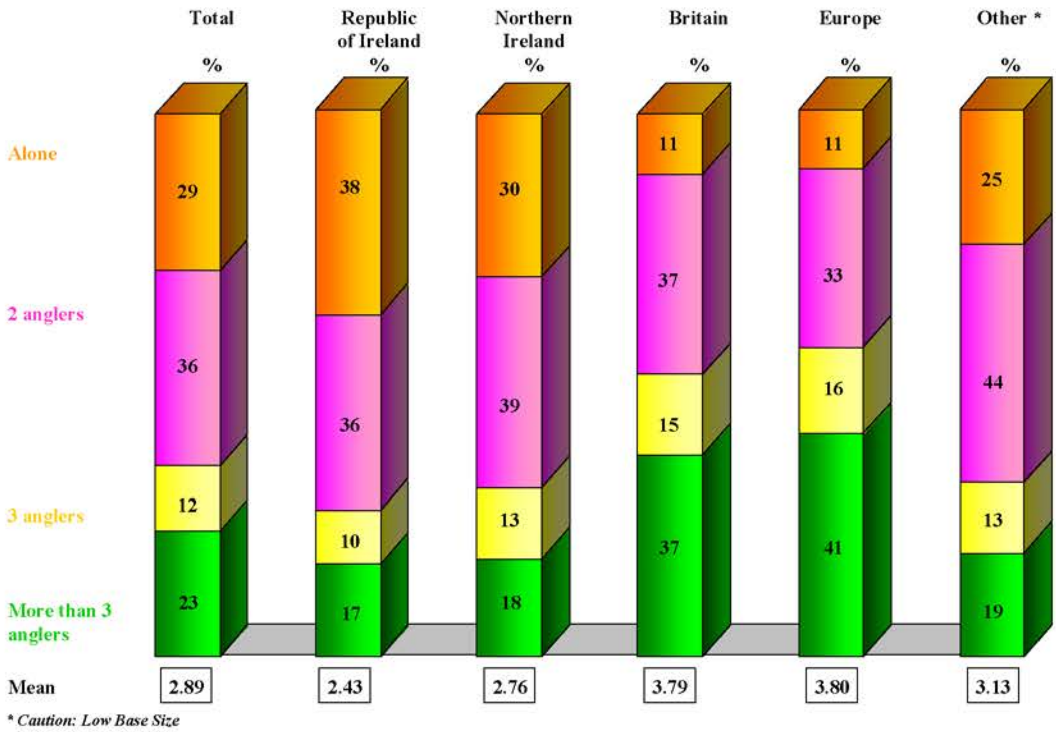



Source: Survey of Recreational Anglers

### 6.7.2 Party Size

The average party size overall was 2.9 with domestic anglers recording the smallest party size (2.4) and anglers from Britain and Europe recording the largest party size (3.8). On average, nearly one quarter (23%) of anglers travelled in groups of three or more. By comparison, 23% of overseas holidaymakers to Ireland travel alone.

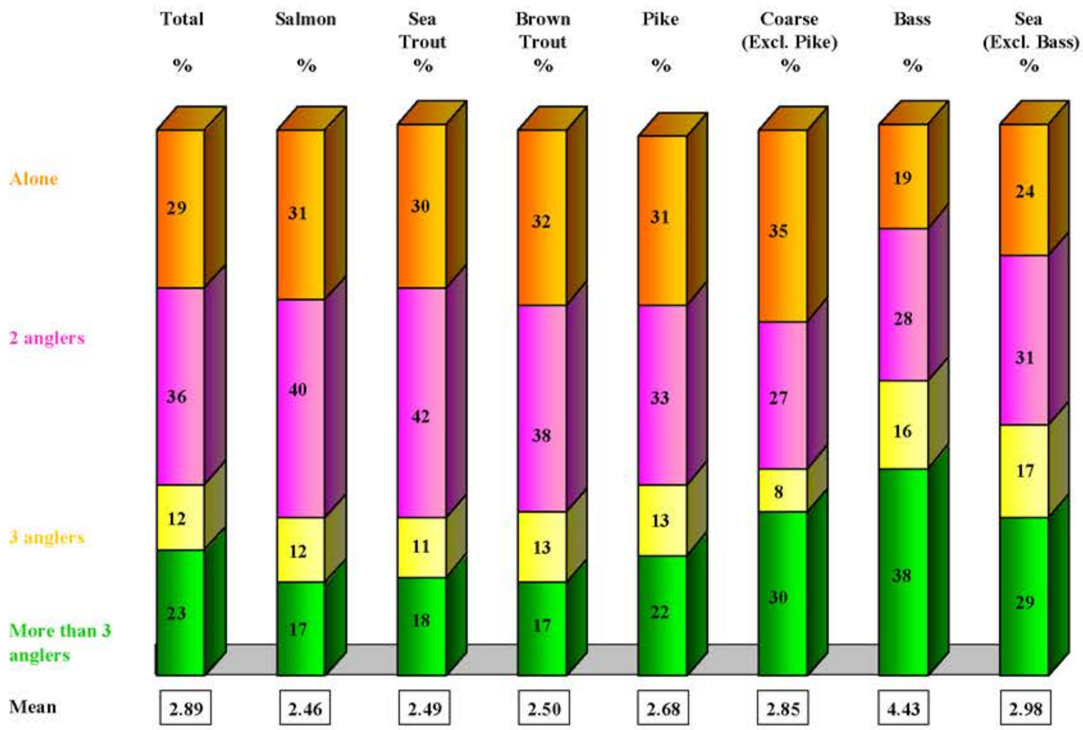
**Figure 6.13 – Party Size x Country of Residence**




Source: Survey of Recreational Anglers

The majority of bass anglers travel in larger groups (54% travelling in groups of 3 or more), whereas 71% of salmon anglers and 72% of sea trout anglers travel in smaller groups (groups of 2 or anglers travelling alone). Only 29% of game anglers travel in groups of 3 or more.

**Figure 6.14 – Party Size x Category**




Source: Survey of Recreational Anglers

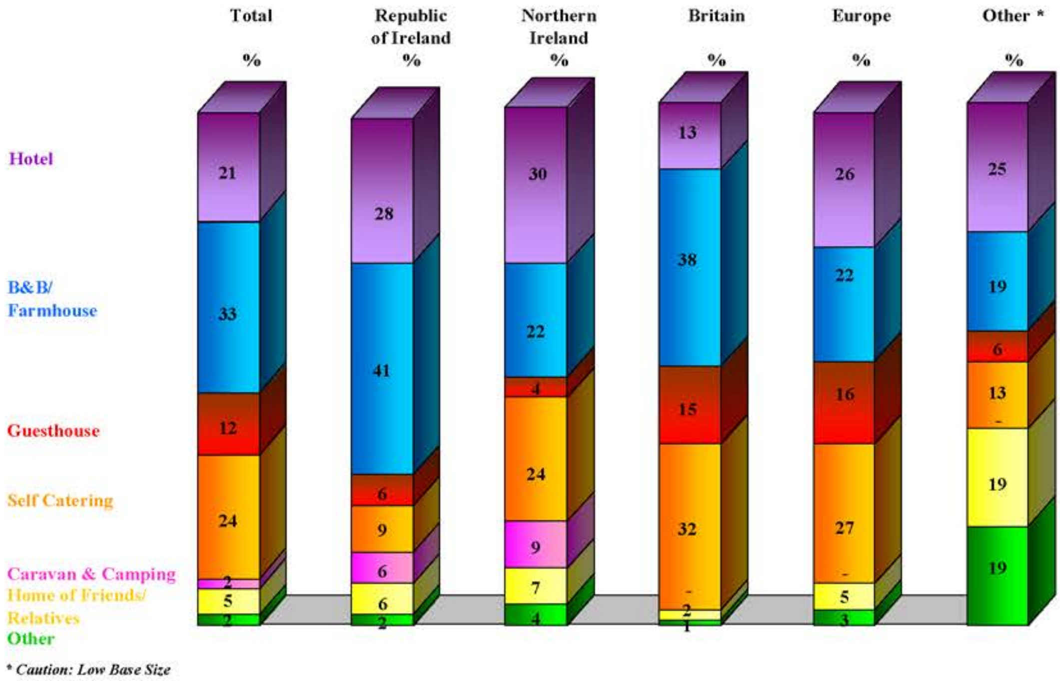
## 6.8 MAIN TYPE OF ACCOMMODATION USED

The main type of accommodation used was only asked of overseas anglers, Northern Ireland anglers and domestic anglers overnighting in the Republic.

Overall, bed & breakfast/farmhouse accommodation proved most popular with one in three (33%) staying there. Self-catering was the main type of accommodation for one in four anglers (24%) while one in five (21%) stayed in a hotel. One fifth of all anglers (22%) used other types of accommodation.

Differences are apparent across the markets with B&B/farmhouse accommodation proving most popular amongst domestic and British anglers, whereas hotels were more popular with anglers visiting from Northern Ireland (30%). Almost four in ten (38%) long haul anglers used alternative accommodation (including hostels and home of friends/relatives, etc.)

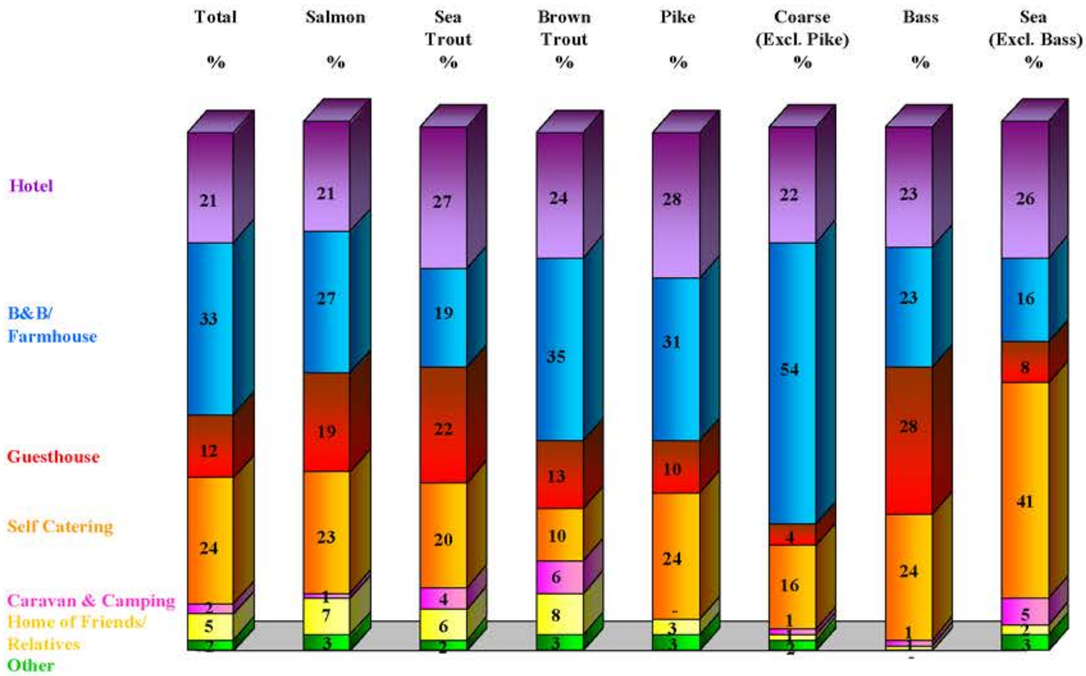
**Figure 6.15 – Main Type of Accommodation x Country of Residence**




Source: Survey of Recreational Anglers

Some differences were also observed by angling category. Guesthouse accommodation was more popular with salmon (19%), sea trout (22%) and bass (28%) anglers, whereas B&B/farmhouse accommodation appealed to coarse anglers in particular (54%). Sea anglers were most likely to use self catering accommodation (41%). Usage of hotels ranged from 21% amongst salmon anglers to 28% where pike anglers are concerned.

**Figure 6.16 – Main Type of Accommodation x Category**




Source: Survey of Recreational Anglers

Usage of accommodation varied according to RBD (region). Self-catering was the most popular form of accommodation used in the South West and North West (mentioned by 31% and 34% respectively). Guesthouse accommodation (mentioned by 50%) was the preferred type of accommodation for anglers visiting the Eastern RBD. B&B/Farmhouse accommodation was the preferred choice for anglers visiting the South East (41%) and the Shannon Region (58%).

B&B/Farmhouses (mentioned by 35%) and hotels (33%) were the preferred accommodation types for anglers visiting the West.

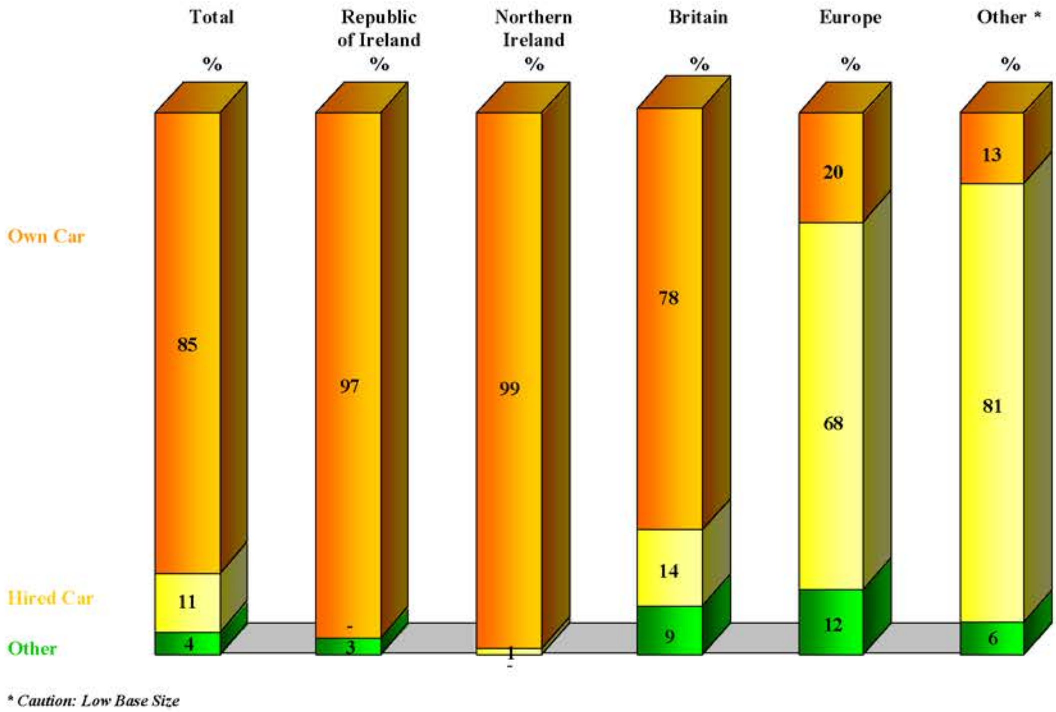
## 6.9 TRANSPORT USED

Overall, the vast majority (85%) of all anglers used their own car whilst in Ireland. Only 1 in 10 (11%) hired a car.

Out of the 11% who did hire a car, almost one in three (32%) were overseas anglers;14% were British anglers, 68% were European anglers and 81% were long haul anglers. The high number of British anglers travelling in their own car (78%) is an indication of the high number arriving to Ireland by car ferry. Coincidentally, 32% of all holidaymakers to Ireland in 2011 hired a car (Fáilte Ireland Tourism Facts 2011).

Car hire usage was higher for game anglers (salmon and sea trout) and bass anglers. In 2011, an estimated 620,000 British visitors (22%) travelled to Ireland by ferry.

**Figure 6.17 – Transport Used x Country of Residence**




Source: Survey of Recreational Anglers

## 6.10 ANGLING CLUB MEMBERSHIP

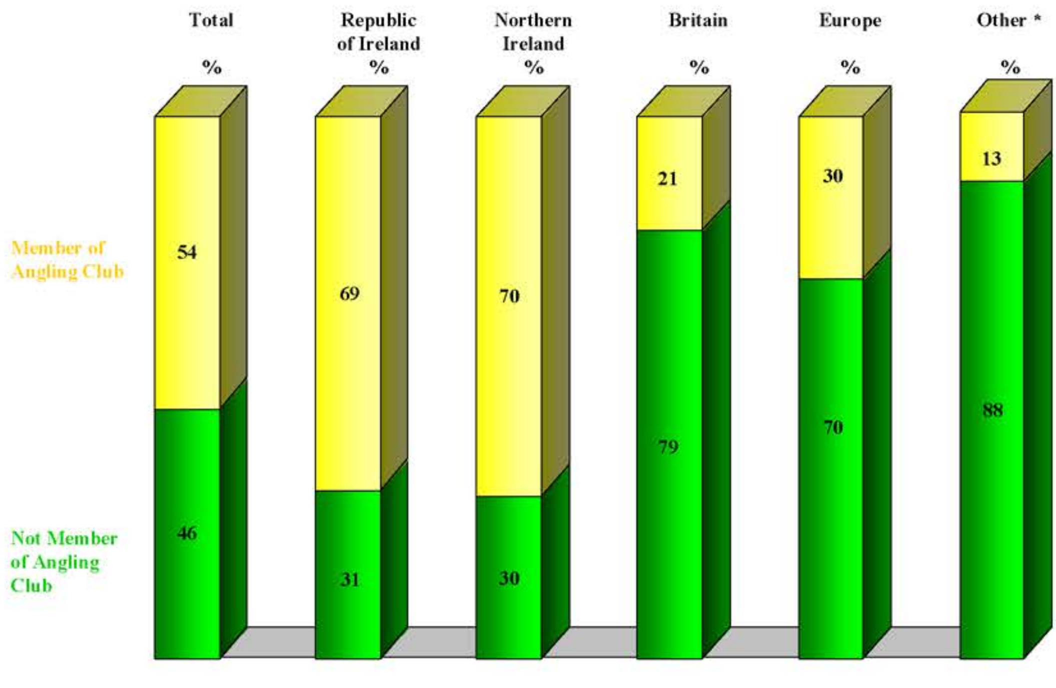
There are an estimated 367 angling clubs in Ireland (Indecon: Assessment of Economic Impact of Sport in Ireland, 2010).

In the *Survey of Recreational Anglers*, the following question was asked:

*"Are you a member of a fishing club?"*

More than half (54%) of the 903 respondents interviewed in the *Survey of Recreational Anglers* had membership of a fishing club. Amongst domestic anglers club membership was higher at 69%.

**Figure 6.18 – Membership of Fishing Club x Country of Residence**




* *Caution: Low Base Size*

Source: Survey of Recreational Anglers

Just under one in four (23%) overseas anglers are club members compared with almost seven out of ten (69%) domestic anglers.

# 7

# Recreational Angling Participation Patterns

# 7. RECREATIONAL ANGLING PARTICIPATION PATTERNS

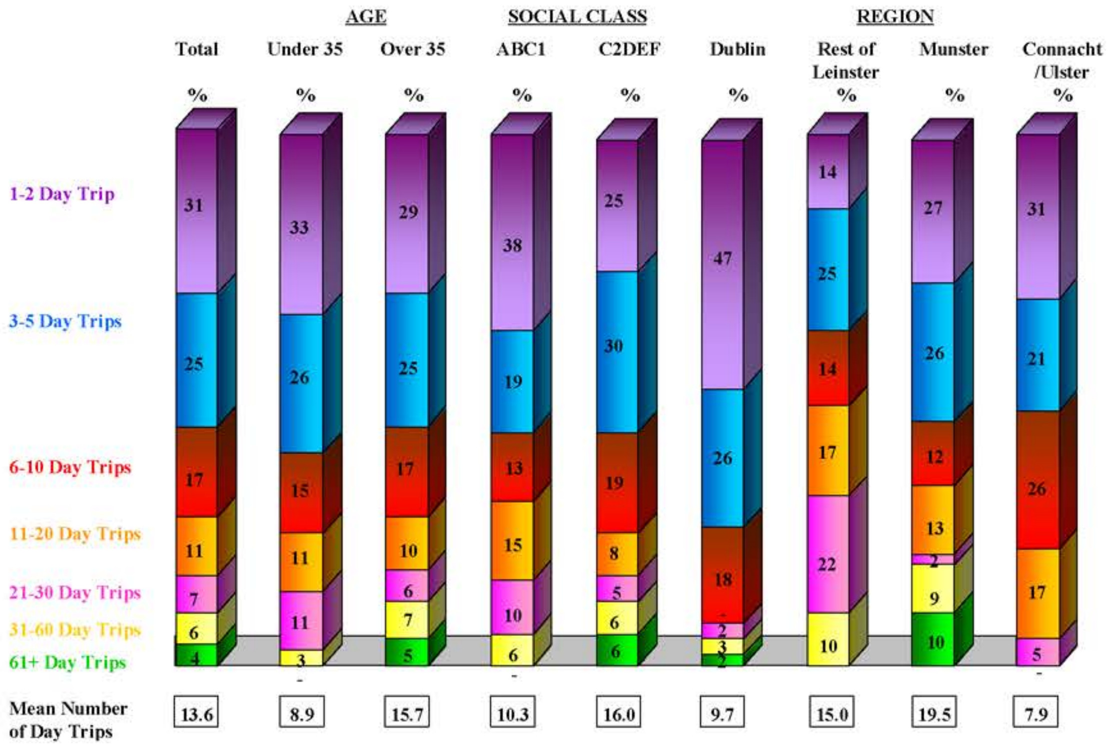
This section examines the participation patterns of domestic and overseas recreational anglers. In most instances, the information presented in respect of domestic anglers is drawn from the *Household Survey* while findings related to overseas angler participation patterns have been sourced exclusively from the *Survey of Recreational Anglers*.

## 7.1 RECREATIONAL ANGLING PARTICIPATION PATTERNS - DOMESTIC

### 7.1.1 Number of Day Fishing Trips in Past 12 months (Domestic)

As previously indicated in Section 5.1.1, domestic anglers participating in day fishing trips took an average of 13.6 day fishing trips in the past 12 months[13].

**Figure 7.1 – Number of Day Fishing Trips* Taken in Past 12 Months (Domestic)**




Source: Millward Brown Lansdowne/Household Survey. * A day angling trip is defined as a trip away from the individual's normal place of residence and not involving an overnight stay.

Younger anglers (aged under 35) took only 9 trips on average, whereas older anglers (aged 35+) took 15 trips. Anglers in the ABC1 social class took fewer day trips than C2DEs while respondents in Munster took twice as many day trips as those residing in Dublin and Connacht/Ulster.

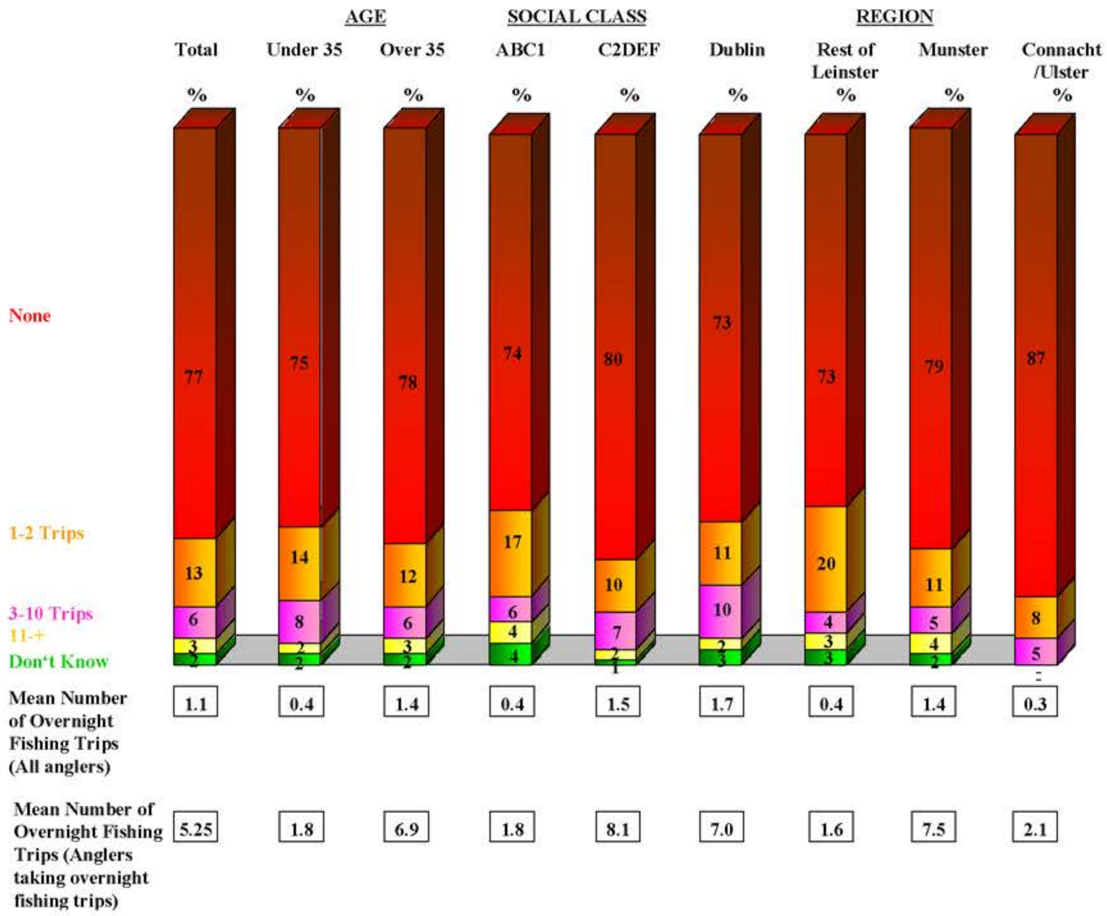
[13] This estimate of the average number of day angling trips can not be compared directly to the average number of trips referred to in Section 3.5. The latter estimate (8.28 days) is a (re)-weighted estimate drawn from an alternative source: the *Survey of Recreational Anglers*.

### 7.1.2 Number of Overnight Fishing Trips in Past 12 months (Domestic)

Fewer than one in four (22%) domestic anglers took an overnight fishing trip in Ireland in the last 12 months (see Figure 7.2 below). Respondents in Dublin, in particular, and Munster, took a higher than average number of overnight trips. The high level of participation by Dubliners could be attributed to the fact that residents of the Capital have the highest levels of disposable income in the State.

The mean number of overnight fishing trips for all domestic recreational anglers is 1.1. For those who made overnight fishing trips, the mean number of trips taken was 5.25.

**Figure 7.2 – Number of Overnight Fishing Trips* Taken in Past 12 Months (Domestic)**

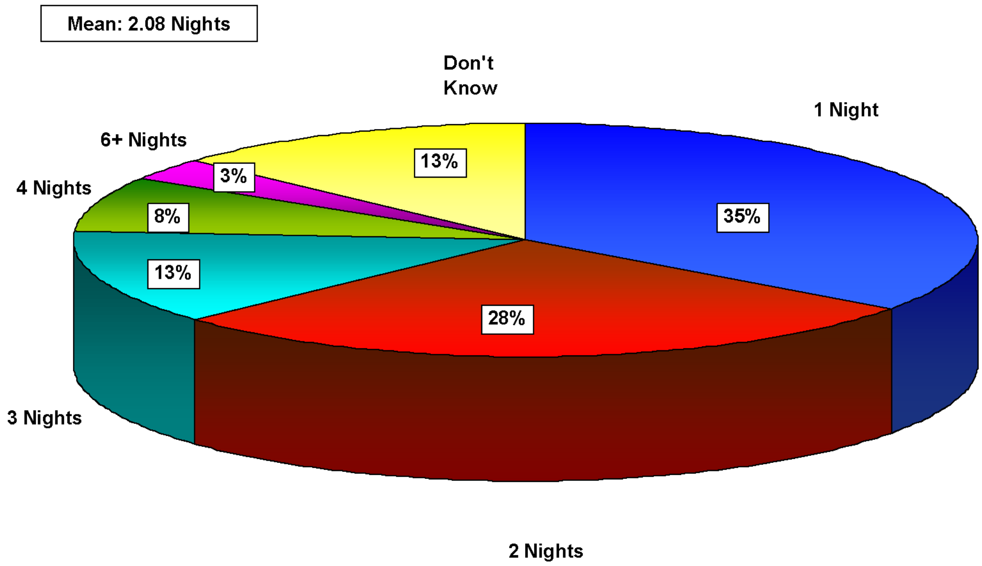



Source: Millward Brown Lansdowne/Household Survey. * An overnight trip involving more than one night away is counted as one trip.

### 7.1.3 Number of Nights Spent Away from Home Fishing (Most Recent Trip - Domestic)

This question was only asked of those respondents who went on an overnight fishing trip in the last 12 months. On their most recent overnight angling trip, domestic anglers spent an average 2 nights away from home. Approximately 1 in 3 (35%) spent only one night away from home.

**Figure 7.3 – Number of Nights Spent Away from Home Fishing in Past 12 Months (Domestic)**



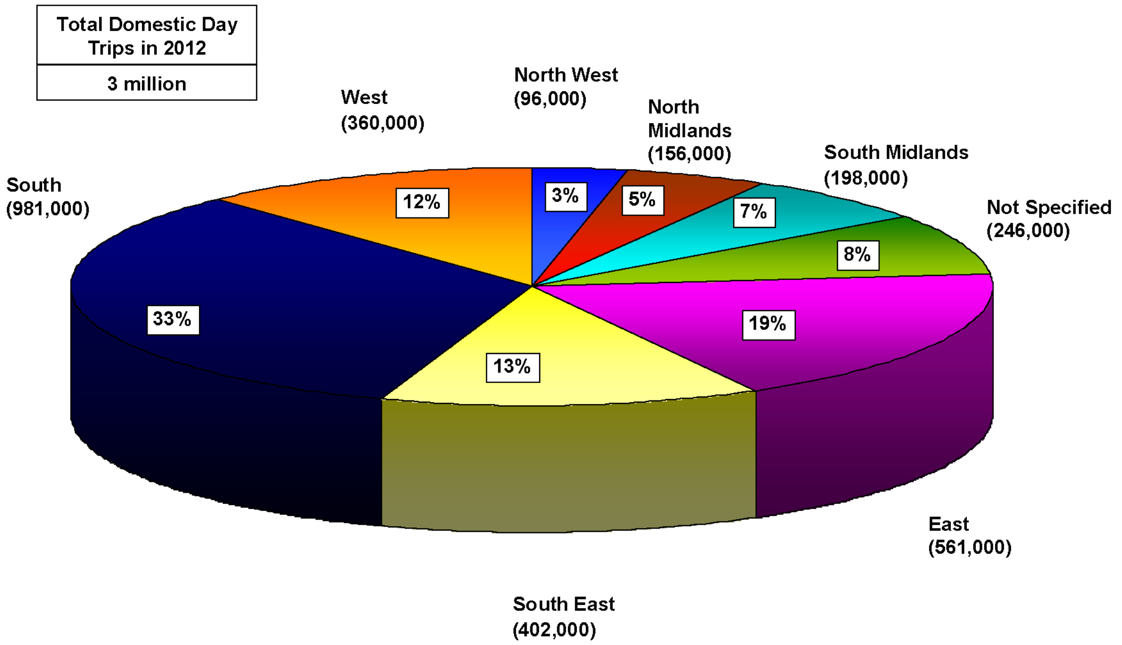

Source: Millward Brown Lansdowne/Household Survey

### 7.1.4 Regional Distribution of Day Fishing Trips (Domestic)

As previously indicated in Section 5.1.1, domestic recreational anglers took an estimated 3 million day fishing trips in 2012. The estimate of total domestic day trips was arrived at by multiplying the average number of day fishing trips (13.61) by the estimated 223,000 individuals from the Republic who participated in one or more day fishing trips in Ireland in 2012 (see Section 3.2).

Additional information obtained from the *Household Survey* enabled us to profile the resulting figure of 3 million day trips by region. It is this regional breakdown of destinations visited on day fishing trips that is shown in Figure 7.4 below.

**Figure 7.4 – Regional[14] Distribution of Day Fishing Trips (Domestic)**




Source: Millward Brown Lansdowne

The South, with almost 1 million trips, accounted for one third (33%) of all day trips taken. The South East and East combined accounted for another third (32%) of all day trips taken by domestic anglers.

[14] In the Household Survey, respondents were asked to record fishing trips according to the following regional breakdown:
East (Louth, Meath, Westmeath, Dublin, Wicklow, Kildare)
South East (Wexford, Waterford, Carlow, Kilkenny)
South (Cork, Kerry)
West (Clare, Limerick, Galway, Mayo, Sligo)
North West (Donegal, Leitrim)
North Midlands (Cavan, Monaghan, Longford, Roscommon)
South Midlands (Laois, Offaly, Tipperary)

## 7.2 RECREATIONAL ANGLING PARTICIPATION PATTERNS - OVERSEAS

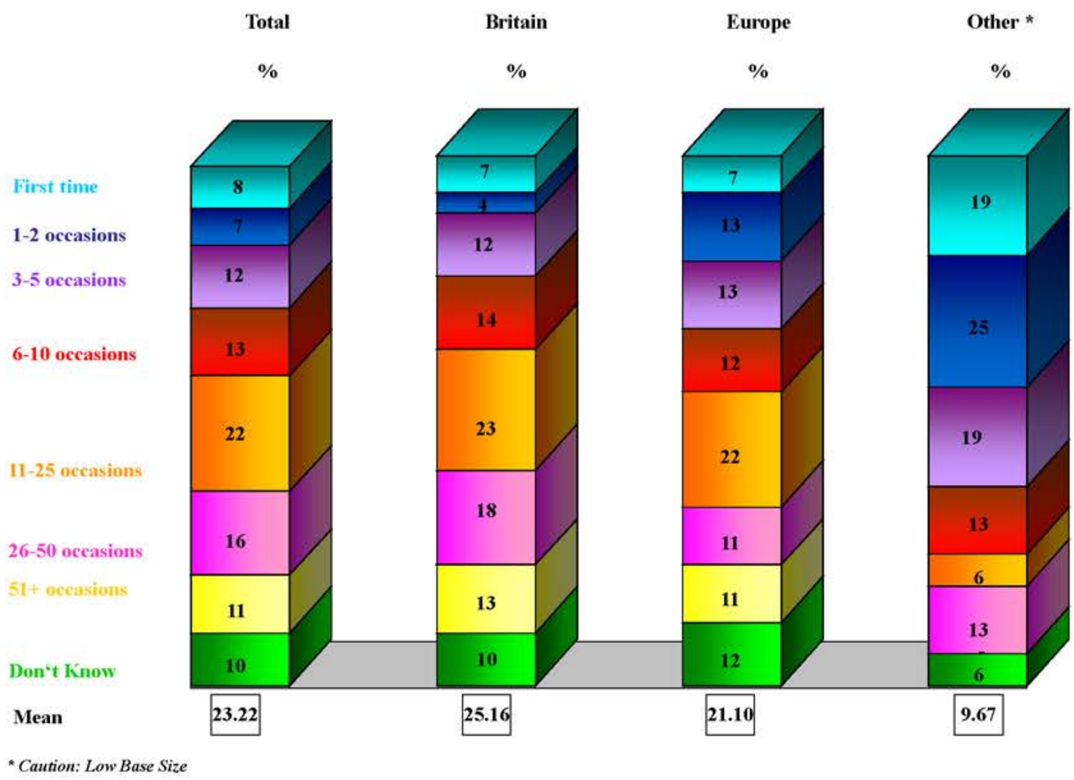
### 7.2.1 Frequency of Irish Fishing Trips by Overseas Anglers

An analysis of overseas angler patterns indicates a very high degree of loyalty to Ireland as an angling destination. Most of the overseas anglers who participated in the *Survey of Recreational Anglers* were repeat visitors with longstanding experience of fishing in Ireland. The high degree of loyalty in terms of repeat visitation is also influenced to an extent by the older age profile of anglers as indicated in Section 6.5. On average, overseas anglers have participated in angling in Ireland on 23 different occasions. This varies significantly by market – British anglers participated on 25 different occasions, whereas long haul anglers participated on only 10 different occasions.

Less than 1 in 10 (8%) are first time visitors, indicating that repeat visitors account for the vast majority of all overseas anglers surveyed. Britain and Europe had the highest proportion of repeat visitors. This represents a significant opportunity for new market growth.

The highest level of first time visits was recorded for long haul visitors (19%). As a point of comparison, 62% of holidaymakers to Ireland in 2011 were first time visitors, whereas only 8% of anglers were first time visitors (Fáilte Ireland Tourism Facts 2011).

**Figure 7.5 – Frequency of Irish Fishing Trips x Overseas Anglers**




Source: Survey of Recreational Anglers

The number of trips indicated in Figure 7.5 above represents the total number of fishing trips ever made to Ireland in the angler's lifetime.

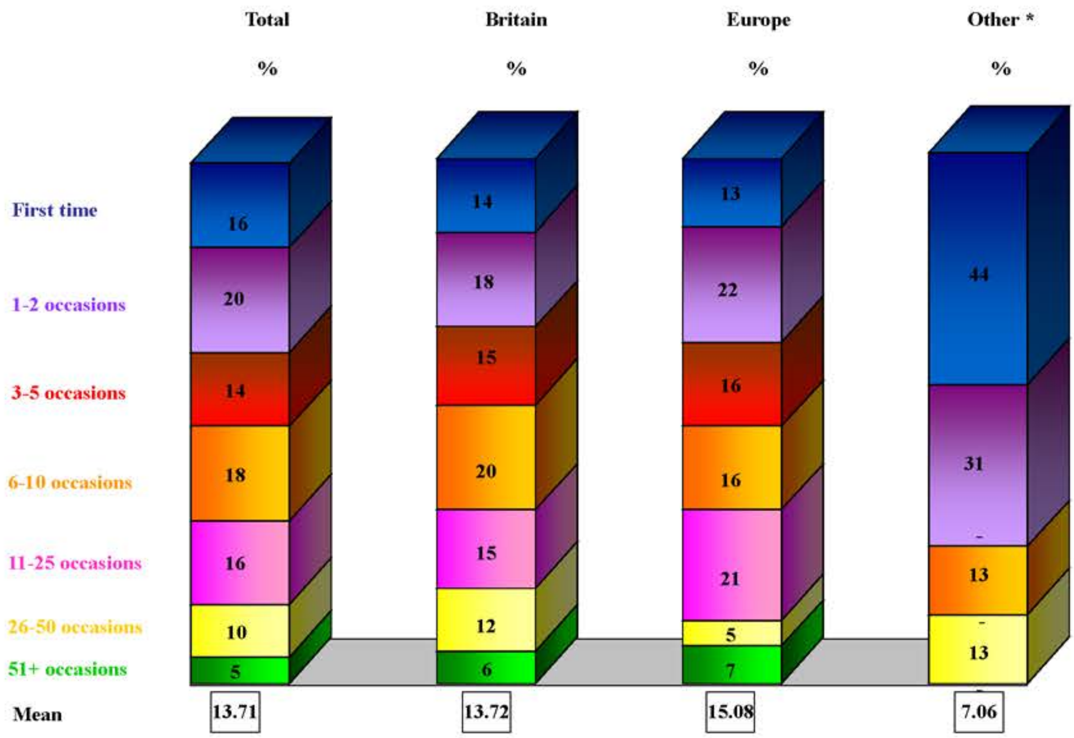
### 7.2.2 Frequency of Fishing Trips to a Particular Fishery by Overseas Anglers

Overseas anglers were asked for the number of previous occasions they had fished at this particular location at which they were interviewed.

Overall, overseas anglers visited the location in question on an average of 13.7 previous occasions, indicating that the locations surveyed attract a high proportion of repeat visitors.

Approximately 1 in 6 overseas (16%) anglers were first time visitors to the particular fishery. Nearly half (44%) of long haul anglers were first time visitors to the particular fishery in question.

**Figure 7.6 – Frequency of Fishing Trips to a Particular Fishery x Overseas Anglers**



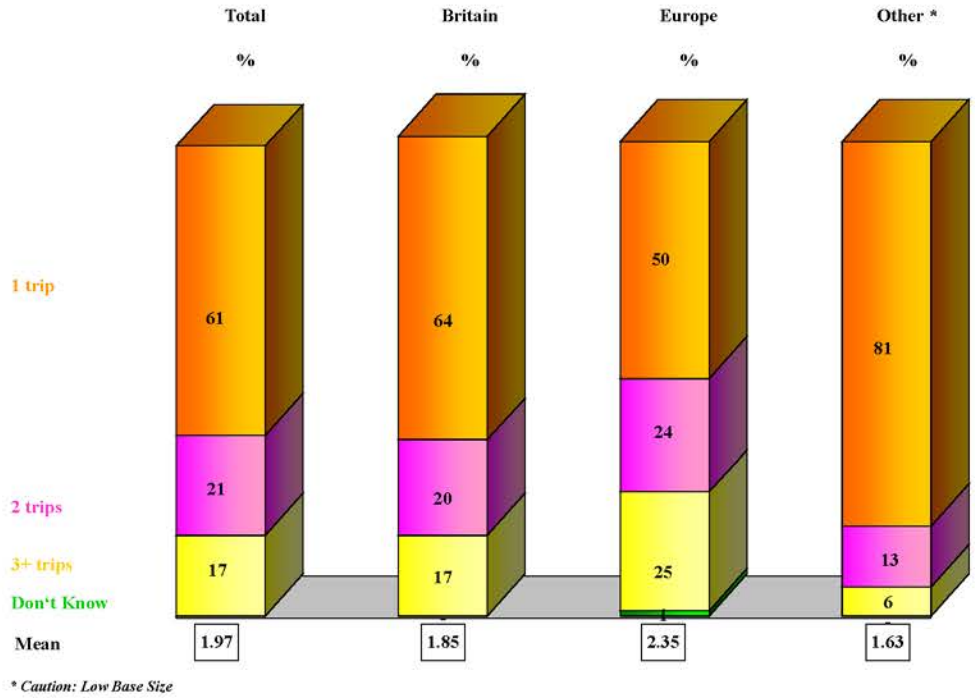

** Caution: Low Base Size*

Source: Survey of Recreational Anglers

### 7.2.3 Fishing Trips Taken in Ireland in Last Year (by Overseas Anglers)

Across the sample of overseas anglers, an average of 2 fishing trips was taken in Ireland in the past 12 months. European anglers were more frequent trip takers (2.4 on average) than British and long haul anglers. A higher than average number of trips was recorded in respect of pike anglers (2.67), sea trout anglers (2.40), brown trout anglers (2.22), salmon anglers (2.18) and sea anglers (2.14). A below average number of trips was recorded for coarse (1.60) and bass (1.67).

**Figure 7.7 – Fishing Trips Taken in Ireland in Last Year (x Overseas Anglers)**

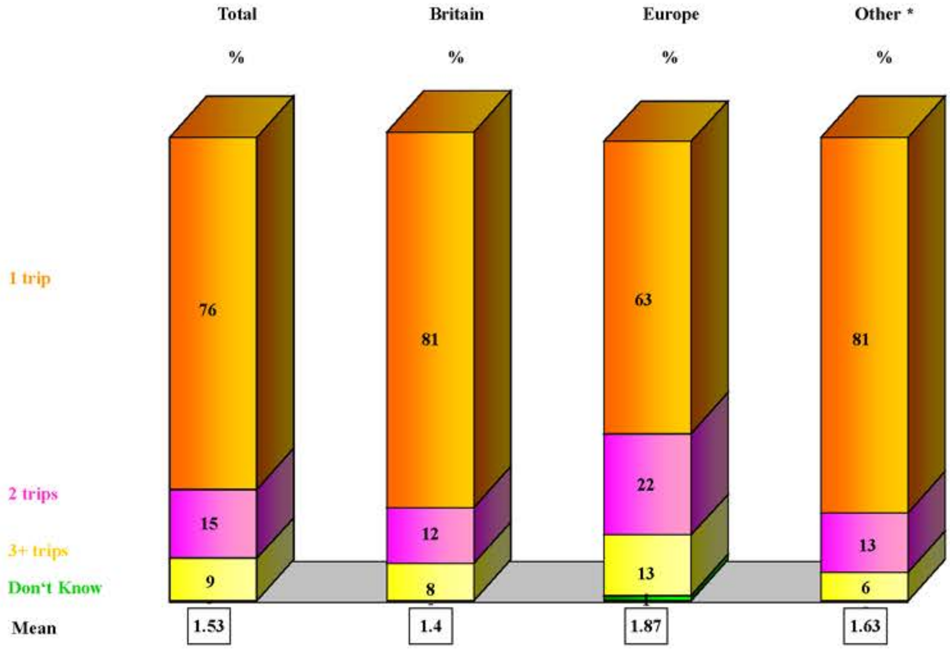



Source: Survey of Recreational Anglers

Overseas anglers were asked how many trips they had taken to this particular fishery in the past 12 months. Overall, an average of 1.5 trips were made to this particular fishery, increasing to 1.9 amongst European anglers in the last 12 months.

As previously indicated, overseas anglers have proven to be very loyal to Ireland with the majority making repeat angling visits to the country. The findings from the *Survey of Recreational Anglers* also indicate that for a majority of overseas anglers, this loyalty also extends to particular fisheries (see Figure 7.8 overleaf).

## Figure 7.8 – Fishing Trips Taken to this Fishery in Last Year (Overseas)




** Caution: Low Base Size*

Source: Survey of Recreational Anglers

### 7.2.4 Angling Participation by Time of Year (Domestic & Overseas)

With sea angling, coarse and pike angling available year round, recreational anglers in Ireland are active throughout the year although some months are obviously more popular than others.

Domestic anglers fish throughout the year with July proving most popular (94%). With salmon, sea trout and trout fisheries open, the period of April to June also represent popular months in terms of participation for the overwhelming majority of Irish anglers. At least 8 out of 10 (85%) domestic anglers fish from the month of August to September inclusive, after which there is a noticeable fall off with the closing of the season on most salmon, sea trout and brown trout fisheries. The ‘quietest’ months of the year are January and December – nevertheless, more than one third of domestic anglers claim to fish during these months.

The patterns of angling participation recorded in respect of overseas anglers are different to those recorded for overseas holiday-makers in general. Where the latter are concerned, July and August are the most popular months in terms of visitation.

For overseas anglers, on the other hand, September is the most popular month for fishing in Ireland. This is also an important month for salmon fishing, the most popular species where overseas anglers are concerned.

Nearly three quarters of overseas anglers go fishing in Ireland during this particular month. May-August are also popular months for overseas anglers but the percentage claiming to fish is significantly lower than in September.

**Figure 7.9 – Angling Participation x Time of Year (Domestic & Overseas)**

| | Total | Republic of Ireland | Northern Ireland | Britain | Europe | Other * |
|---|---|---|---|---|---|---|
| January | 26% | 38% | 30% | 3% | 1% | - |
| February | 32% | 47% | 39% | 5% | 5% | 6% |
| March | 52% | 74% | 65% | 9% | 11% | 13% |
| April | 64% | 84% | 84% | 20% | 24% | 25% |
| May | 70% | 90% | 83% | 27% | 41% | 19% |
| June | 75% | 92% | 88% | 43% | 29% | 38% |
| July | 75% | 94% | 94% | 31% | 46% | 38% |
| August | 74% | 92% | 88% | 37% | 39% | 19% |
| September | 85% | 92% | 84% | 76% | 74% | 25% |
| October | 46% | 57% | 58% | 27% | 9% | 6% |
| November | 28% | 40% | 30% | 5% | 3% | 6% |
| December | 24% | 37% | 25% | 3% | - | - |

Source: Survey of Recreational Anglers

Monthly participation rates for game anglers ranges from 70% in April to 82% in September.

The pattern for coarse angling is different to that of game angling. Even though May-September are the most popular months with coarse anglers, this group fish throughout the year with over half (57%) fishing in April and two thirds (66%) fishing in October. For the months of November to February inclusive, participation rates for coarse anglers range from 41% to 43%.

The pattern of fishing for sea anglers is very similar to that of coarse anglers although levels of participation are somewhat lower.

# 8

# Motivations, Attitudes & Stakeholders Perspectives

# 8. MOTIVATIONS, ATTITUDES AND STAKEHOLDERS PERSPECTIVES

This section of the report examines the motivations, attitudes to the Irish angling product, as well as the experiences of fishing in countries other than Ireland by the recreational angler. The latter information is drawn from the *Survey of Recreational Anglers*. The key findings from the *Survey of Angling Stakeholders* are presented in Section 8.4.

## 8.1 MOTIVATIONS OF RECREATIONAL ANGLERS

### 8.1.1 Most Appealing Aspects of Ireland as a Destination for Recreational Anglers

At the outset of the interview, respondents were asked the following question:
*"What is the most appealing aspect of Ireland as a destination for recreational angling? What, if anything, makes Ireland unique?"*

Quality of fishing is mentioned spontaneously (33%) as the *most appealing aspect* of Ireland as a destination for recreational angling. Other aspects mentioned that also relate to the fishing experience include the scenery (29%), the wild/natural environment (15%), the variety of fish/species (15%), the variety of angling locations (13%) and the peaceful/quiet/not over-crowded locations (11%). Hospitality also features strongly (the friendliness of people/fishermen (28%)).

There are some market divergences in the responses to this question. For example, friendliness/hospitality features strongly for overseas visitors, particularly where British (53%) and European (50%) anglers are concerned. The scenery resonates with European (51%) and long haul (44%) visitors (in particular). The variety of fish/species (28%) is important to anglers from Europe. Anglers from Northern Ireland cite the quality of fishing (41%) as the most appealing aspect.

**Figure 8.1 – Most Appealing Aspects of Ireland x Country of Residence**

| | Total | Republic of Ireland | Northern Ireland | Britain | Europe | Other |
|---|---|---|---|---|---|---|
| Quality of fishing | 33% | 29% | 41% | 39% | 37% | 13% |
| Scenery | 29% | 22% | 35% | 35% | 51% | 44% |
| Friendliness of people / Fishermen / Hospitality | 28% | 16% | 20% | 53% | 50% | 38% |
| Variety of fish / species | 15% | 16% | 13% | 11% | 28% | - |
| Wild/Not stocked/Natural/ Not managed | 15% | 17% | 16% | 11% | 5% | 13% |
| Variety of Locations | 13% | 14% | 6% | 11% | 13% | 19% |
| Peaceful / Quiet / Not over-crowded | 11% | 12% | 13% | 11% | 5% | - |
| Good pubs/Accommodation/ Food | 6% | 2% | 4% | 12% | 11% | 19% |

Source: Survey of Recreational Anglers

### 8.1.2 Least Appealing Aspects of Ireland as a Destination for Recreational Anglers

A similar question was asked of respondents in respect of 'least appealing aspects' of Ireland.

Overall, 15% of anglers had no criticisms when asked about the least appealing aspects of Ireland as a destination for recreational anglers. Overseas anglers were most positive with one in four (24%) not having any criticisms. Of the remaining anglers (63%), that did identify some aspect of Ireland as an angling destination lacking appeal, the aspects mentioned relating to non-angling specific areas accounted for 34%. These were cost (14%), bad weather (13%) and litter (7%). Angling specific areas that were mentioned accounted for 29% and these were illegal fishing/overfishing/fish kills (13%), declining fish stocks (8%) and difficulty of access to fisheries (8%). 22% of respondents had no comment to this question.

**Figure 8.2 – Least Appealing Aspects of Ireland x Country of Residence**

| | Total | Republic of Ireland | Northern Ireland | Britain | Europe | Other* |
|---|---|---|---|---|---|---|
| Nothing | 15% | 10% | 9% | 23% | 26% | 31% |
| Cost | 14% | 15% | 11% | 17% | 8% | 6% |
| Illegal Fishing/ Overfishing/ Lack of catch and release | 13% | 16% | 11% | 9% | 9% | 6% |
| Bad weather | 13% | 11% | 16% | 15% | 17% | - |
| Declining fish stocks/Not enough fish | 8% | 7% | 11% | 7% | 13% | - |
| Difficult access | 8% | 7% | 12% | 9% | 1% | 19% |
| Litter | 7% | 8% | 6% | 6% | 8% | - |

Source: Survey of Recreational Anglers * *Caution Low Base*

### 8.1.3 Sources of Information Used

With regard to *sources of information used* when choosing an angling location, personal recommendation is a key factor with almost two thirds of visitors (62%) saying that friends/relatives/word of mouth are used. The internet is second in importance having been mentioned by half the sample (50%) and by 62% of European anglers. The latter is a general reference to information sourced from the internet which could include the IFI or Discover Ireland websites. Magazines play an important role in location choice, mentioned by 19% overall and particularly visitors from Europe (30%), Britain (26%) and Northern Ireland (25%). Guide books were mentioned by just 7% overall (rising to 19% among long haul visitors). Inland Fisheries Ireland is a valuable source of information for 1 in 6 overall (17%). There is high awareness amongst angling stakeholders of the IFI website (mentioned by 92%). An opportunity exists to extend marketing activity to include additional social media initiatives, angling apps, etc.)

Propensity of returning to Ireland or recommending a trip to family/friends for a *fishing holiday* is high with three quarters of all overseas visitors (77%) claiming that they are 'very likely' to return/recommend. This is consistent with the high levels of loyalty to Ireland and specific fisheries as shown previously in Figures 7.5 and 7.6. As a point of comparison, 54% of holidaymakers to Ireland in 2011 said they planned to return in the next few years (Fáilte Ireland Tourism Facts 2011).

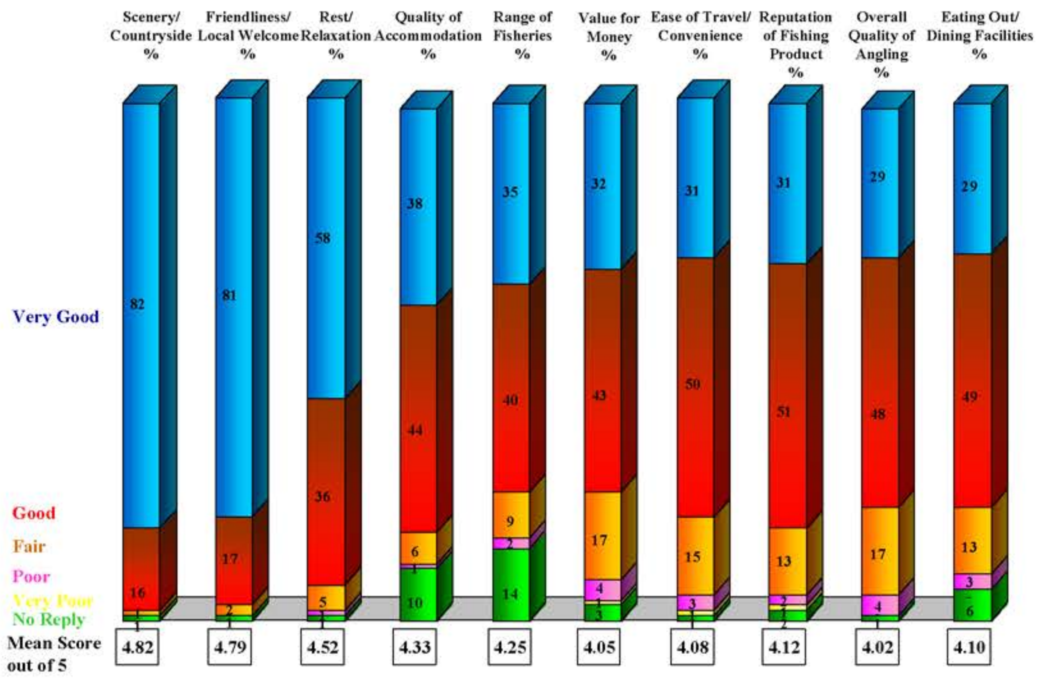
## 8.2 OPINIONS AND ATTITUDES ON THE IRISH ANGLING PRODUCT

Across the entire sample of recreational anglers, the scenery/countryside/environment and the friendliness/local welcome received the highest levels of endorsement with 82% and 81% respectively rating these aspects as 'very good'. Other aspects of the fishing product that were rated highly were those relating to hospitality, namely rest and relaxation (58%) and quality of accommodation near the fishery (38%).

Although the rank order of responses (based on those rating aspect 'very good') differ somewhat, the findings are broadly consistent with research carried out by Fáilte Ireland in the UK market in 2011.

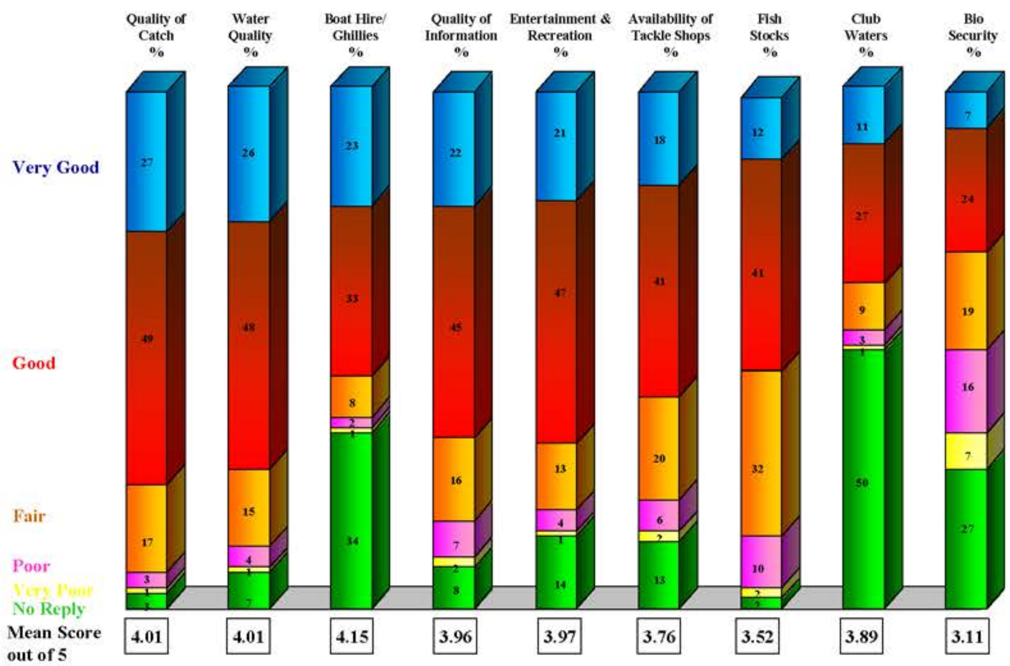
With regard to the fishing experience itself, the range of fisheries, overall quality of angling, quality of catch and water quality all performed well. However, levels of dissatisfaction (fair/poor/very poor) were high where fish stocks (45%) and bio security (42%) are concerned.

## Figure 8.3 – Rating of Aspects of Fishing Product (Part 1)




Source: Survey of Recreational Anglers

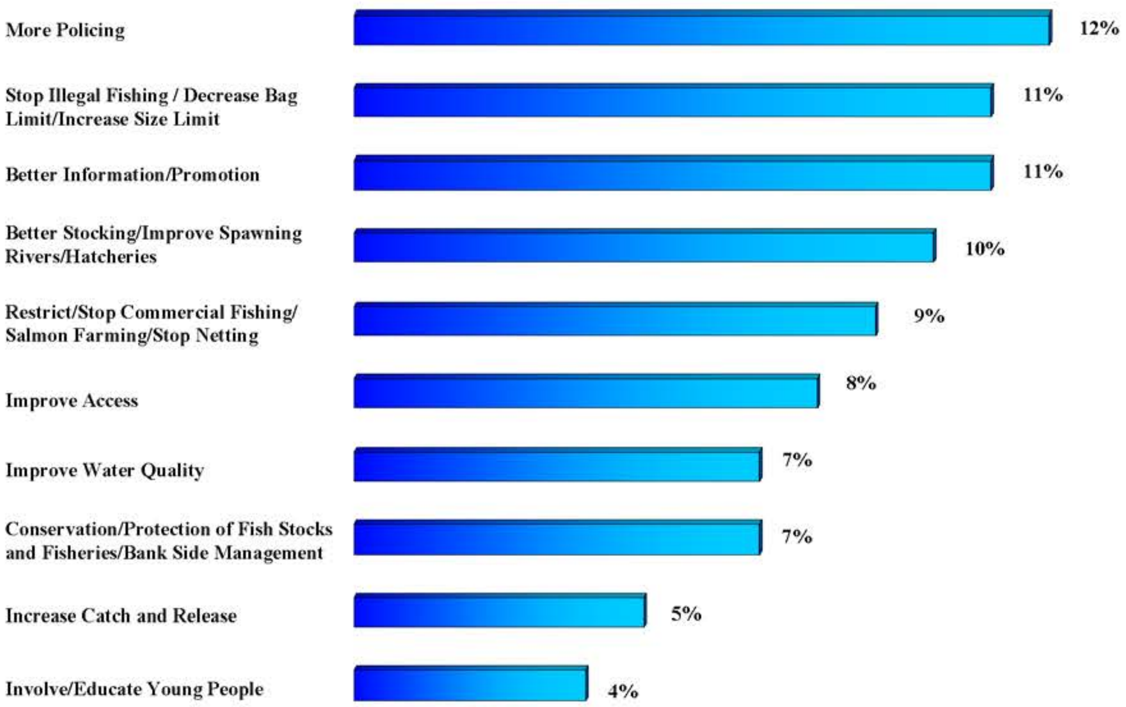
## Figure 8.4 – Rating of Aspects of Fishing Product (Part 2)




Source: Survey of Recreational Anglers

Initiatives spontaneously mentioned by respondents to improve angling include greater policing (12%), better information/promotion (11%) and measures to stop illegal fishing (11%). Improved access was spontaneously mentioned by 1 in 4 (26%) coarse anglers.

**Figure 8.5 – Initiatives that Anglers Would Like to See Implemented to Improve Angling**




Source: Survey of Recreational Anglers

## 8.3 BENCHMARKING IRELAND AGAINST ITS COMPETITORS

Overall, just over 4 in 10 (41%) have taken a holiday trip involving fishing in countries other than Ireland over the past 3 years. More than half (56%) of all overseas anglers have taken such a trip compared with just 1 in 3 (33%) domestic anglers.

Scotland was the most popular destination with 1 in 4 (25%) claiming to have visited there in the past 3 years. England (20%) and Spain (16%) were also popular particularly amongst domestic anglers. European anglers favoured Northern Europe (Norway, Denmark and Sweden), whereas Scotland was the preferred choice for anglers from Northern Ireland and Britain. Anglers from the USA were more likely to visit closer to home (either a destination in the USA or in Canada).

The quality of fishing (amount and size) is the most appealing aspect of other fishing destinations. It was mentioned spontaneously by nearly 1 in 2 (49%) anglers overall and by more than two thirds (67%) of European anglers. 1 in 5 (19%) anglers were attracted by the different types of fish and the scenery appealed to Europeans in particular (29%).

When looked at by country visited, a picture emerges of what each destination has to offer.

**Figure 8.6 – Most Appealing Aspects of Countries Visited for Angling (ROI/NI Anglers)**

| | Total | England | Scot-land | Spain | USA | Canada | Wales | France | Italy | Norway | Nether-lands |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Quality of fishing (amount & size) | 44% | 38% | 51% | 25% | 56% | 69% | 54% | 42% | 31% | 46% | 40% |
| Different types of fish | 19% | 12% | 8% | 23% | 33% | 19% | 17% | 16% | 13% | 8% | 10% |
| Better managed | 18% | 23% | 27% | 18% | 22% | 19% | 25% | 21% | 19% | 23% | 70% |
| Scenery | 14% | 17% | 20% | 15% | 11% | 42% | 21% | - | 6% | - | 10% |
| Good weather | 13% | 6% | 4% | 28% | 7% | 12% | - | 21% | 38% | 15% | - |
| Friendly people | 10% | 10% | 18% | 8% | 7% | 15% | 8% | - | - | 15% | 10% |
| Similar to Ireland | 7% | 8% | 12% | 10% | - | 4% | 8% | 5% | - | - | - |

Source: Survey of Recreational Anglers

**Figure 8.7 – Most Appealing Aspects of Countries Visited for Angling (Overseas Anglers)**

| | Total | Scotland | Norway | Spain | England | Canada | USA | Wales | Nether-lands | Denmark |
|---|---|---|---|---|---|---|---|---|---|---|
| Quality of fishing (amount & size) | 54% | 51% | 86% | 48% | 52% | 62% | 83% | 53% | 60% | 77% |
| Scenery | 20% | 32% | 29% | 4% | 19% | 38% | 6% | 29% | 7% | 31% |
| Different types of fish | 18% | 15% | 25% | 30% | 10% | 33% | 11% | 6% | 20% | 23% |
| Good weather | 15% | 5% | 7% | 39% | 5% | - | 17% | 12% | 13% | 15% |
| Good value for money | 10% | 24% | 14% | - | 10% | 19% | 22% | 6% | 7% | 15% |
| Closer to home | 10% | 17% | 7% | 13% | 10% | 5% | - | 29% | 27% | 31% |

Quality of fishing is cited as the most appealing aspect of Norway, the USA and Canada as angling destinations. Spain, the USA and Canada appeal because of the different species of fish available, while the good weather is also mentioned as a factor which contributes to the appeal of Spain and France. Angling in Scotland and England is perceived to be better managed while Scotland is seen as offering the best value for money as far as the overall angling experience is concerned.

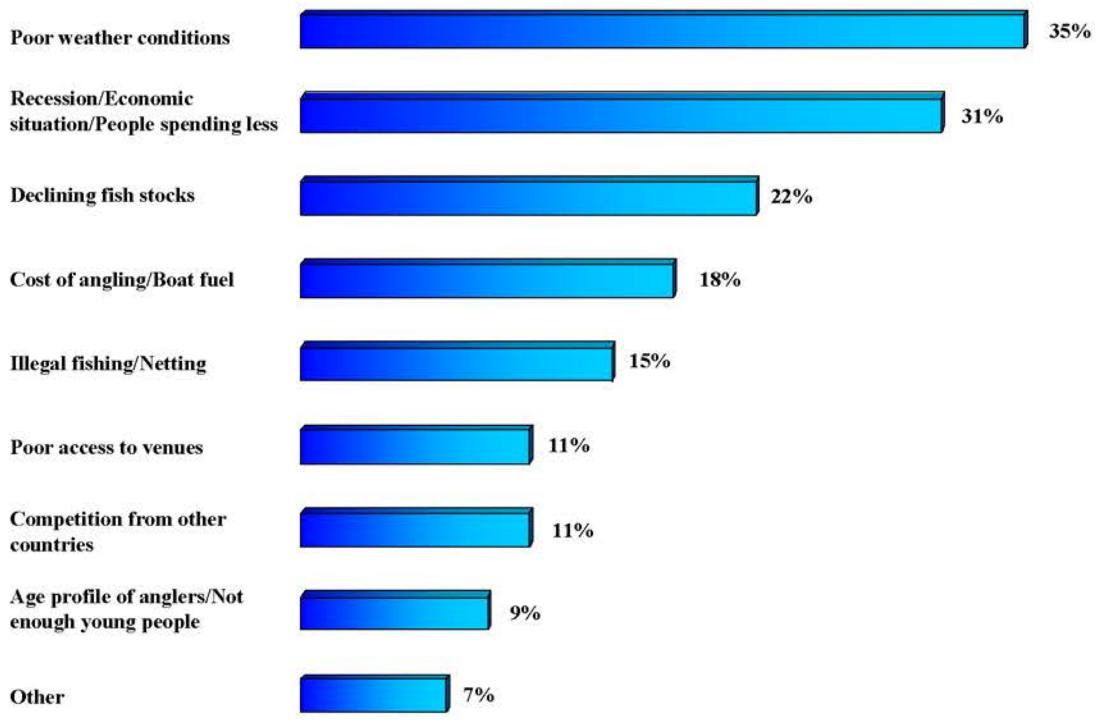
## 8.4 THE ANGLING STAKEHOLDERS PERSPECTIVE

Across the range of angling species a significant proportion of stakeholders perceive the number of anglers in each category to have *declined* in the last five years.

Primary drivers of the *decrease* in angling participation include general tourism related and angling specific factors. General factors include poor weather (35%) and the recession/economic situation (31%).

Angling specific factors were also highlighted. These include issues such as quality of fishing, illegal practices and cost, and echo some of the concerns raised by recreational anglers in Section 8.2.

**Figure 8.8 – Factors that have Contributed to Decrease in Angling Participation**




Source: Survey of Angling Stakeholders

The markets identified by angling stakeholders as experiencing the greatest *decrease* in angling customers over the last five years include the Netherlands, Belgium, Britain, Northern Ireland and Denmark. Visitors from other key markets, such as France and Germany, are also thought to have declined over the last five years.

Over two thirds of anglers mentioned positive developments in angling in recent years and 17% of stakeholders felt there had been an improvement in this respect in recent years. It is reassuring to note that the biggest perceived improvement concerns water quality. The abolition of drift netting (a practice widely accepted to have impacted on the performance and growth potential of angling tourism in Ireland) was mentioned by 7% as a positive development.

24% of accommodation providers cited water quality improvement as a positive development in angling in recent years. Developments in youth activities, sea, bass and salmon fishing were cited as positive improvements by fishing tackle shop proprietors. Ghillies felt that increased support from IFI was the most positive development in recent years and those providing boat hire have noticed improvements in water quality and positive developments in coarse and pike fishing. The increase in Eastern European anglers fishing in Ireland was seen as positive development by charter boat operators.

**Figure 8.9 – Positive Developments in Angling in Recent Years x Type of Establishment**

| | Total | Accom-modation | Fishing Tackle Shop | Ghillie/ Guide | Boat Hire | Charter Boat Operator | Other |
|---|---|---|---|---|---|---|---|
| Improved water quality | 17% | 24% | - | 7% | 47% | - | 33% |
| Support from IFI | 9% | 9% | 5% | 20% | - | 15% | - |
| Youth activities | 8% | 3% | 14% | - | 7% | 15% | 33% |
| Good coarse/pike fishing | 8% | 9% | 5% | 7% | 20% | - | - |
| Abolition of drift netting | 7% | 9% | 9% | 7% | - | - | 33% |
| Good bass/sea fishing | 6% | 3% | 18% | - | - | 8% | - |
| East Europeans are keen anglers | 5% | - | - | - | 7% | 31% | - |
| Increase in French/Canadians | 5% | 3% | 9% | - | 13% | - | - |
| Good salmon fishing | 4% | - | 14% | 7% | - | - | - |
| More people with free time to fish | 4% | 3% | 9% | - | 7% | - | - |
| Other | 16% | 27% | 14% | 14% | 0% | 16% | 0% |
| No reply | 32% | 35% | 23% | 53% | 7% | 46% | 33% |

Source: Survey of Angling Stakeholders

Although the research findings highlight some positive developments in the marketing/promotion of the Irish angling product in recent years (such as IFI support, youth activities etc), stakeholders are of the view that more work needs to be done in this area.

## GLOSSARY

| | |
|---|---|
| Recreational angling | Recreational angling is the activity of catching or attempting to catch fish, principally by rod and line, pole or hand-held line for non-commercial purposes; recreational anglers do not sell the fish they catch. |
| Domestic angler | Angler resident in the Republic of Ireland. |
| Overseas / out of state angler | Angler resident outside of the Republic of Ireland. |
| Day trip | Trip away from the individual's normal place of residence and not involving an overnight stay. |
| Overnight trip | An overnight trip involving one or more overnights away is counted as one trip. |
| Bio security | Protection of the environment, economy and health of all living things from the impacts associated with biological invasions, parasites and diseases. |
| Primary survey | Primary research (also called field research) involves the collection of data that does not already exist. |
| Desk Research | Secondary research (also known as desk research) involves the summary, collation and/or synthesis of existing research rather than primary research, where data is collected from research subjects. |
| Omnibus survey | An omnibus survey is a method of quantitative marketing research where data on a wide variety of subjects is collected during the same interview which is conducted door to door at selected locations throughout the country. |
| Direct economic impact of angling | Direct Economic Impact is a measure of the total amount of additional expenditure within a defined geographical area, which can be directly attributed to recreational angling. |
| Indirect economic impact of angling | Indirect Economic Impacts concern intermediate consumption for the production of goods and services in the recreational angling sector. These are goods and services that angling stakeholders purchase from their suppliers. |
| Induced economic impact of angling | Additional expenditure as a result of those who derive incomes from the direct and supply linkage impacts of an initial injection into the economy. |
| Socio economic background | (Socio-economic group) Social classes are economic or cultural arrangements of groups in society. The grades are often grouped into ABC1 and C2DE and these are taken to equate to middle class and working class respectively. |
| Aggregate non market value | While the monetary value of fish is priced in a market, goods and services like beach visits for recreational angling or swimming and |

| | |
|---|---|
| | storm surge protection from wetland habitats do not have values regularly reflected in market transactions even though these goods and service are of value to individuals. These are referred to as non-market values. |
| RBDs - River Basin Districts: | On establishment, for the purposes of performing the functions assigned to it under the Inland Fisheries Act 2010, IFI shall manage and report its business on the basis of that part of the River Basin Districts (RBD) which are situate within the State. River Basin Districts are not confined to specific counties, however to aid comprehension the main counties included in the RBDs are listed with the RBDs below:<br>• Eastern RBD (including the Neagh Bann RBD): Wicklow, Kildare, Dublin, Meath, Louth<br>• South Eastern RBD: Wexford, Waterford, Carlow, Kilkenny, Laois, Tipperary<br>• South Western RBD: Cork & Kerry<br>• Western RBD: Galway, Mayo, Sligo<br>• North Western RBD: Donegal, Leitrim, Monaghan, Cavan<br>• Shannon RBD: Clare, Limerick, North Tipperary, Offaly Westmeath, Roscommon & Longford<br>The River Basin Districts are defined in the Second Schedule to the European Communities (Water Policy) Regulations 2003 (S.I. No. 722 of 2003) |
| Existence value | The value that is placed (through stated willingness to pay)on knowing that a particular public good or service, such as an endangered species remains in existence. |
| Option value | The value that is placed (through stated willingness to pay) on maintaining or preserving a public good or service so that the option of using it remains in the future. |
| Endogenous stratification | The likelihood of being sampled depends on the frequency with which an individual visits the sampling site. |
| Composite multiplier | A measure of the additional economic activity (jobs, expenditure or income) associated with additional local income and supplier purchases. It includes the indirect and induced impacts from the initial increase in income and purchases. |
| Supply linkage multiplier | Purchases associated with linked firms along the supply chain. |
| Contingent valuation method | The contingent valuation method (CVM) is a survey based stated preference technique which asks respondents directly to express their maximum willingness to pay (WTP) (or willingness to accept) for a hypothetical charge relating to a non-market good such as the quality of fish stocks and the angling experience. |
| Bid design | The bid design refers to the size and range of monetary values that the respondents were asked to choose from when being asked to state their WTP. |

| | |
|---|---|
| Aggregate welfare | The overall level of satisfaction and prosperity experienced by participants in an economic system. |

# Appendix A

## References


RX

# APPENDIX A – REFERENCES


| | Name | For | Author | Date |
|---|---|---|---|---|
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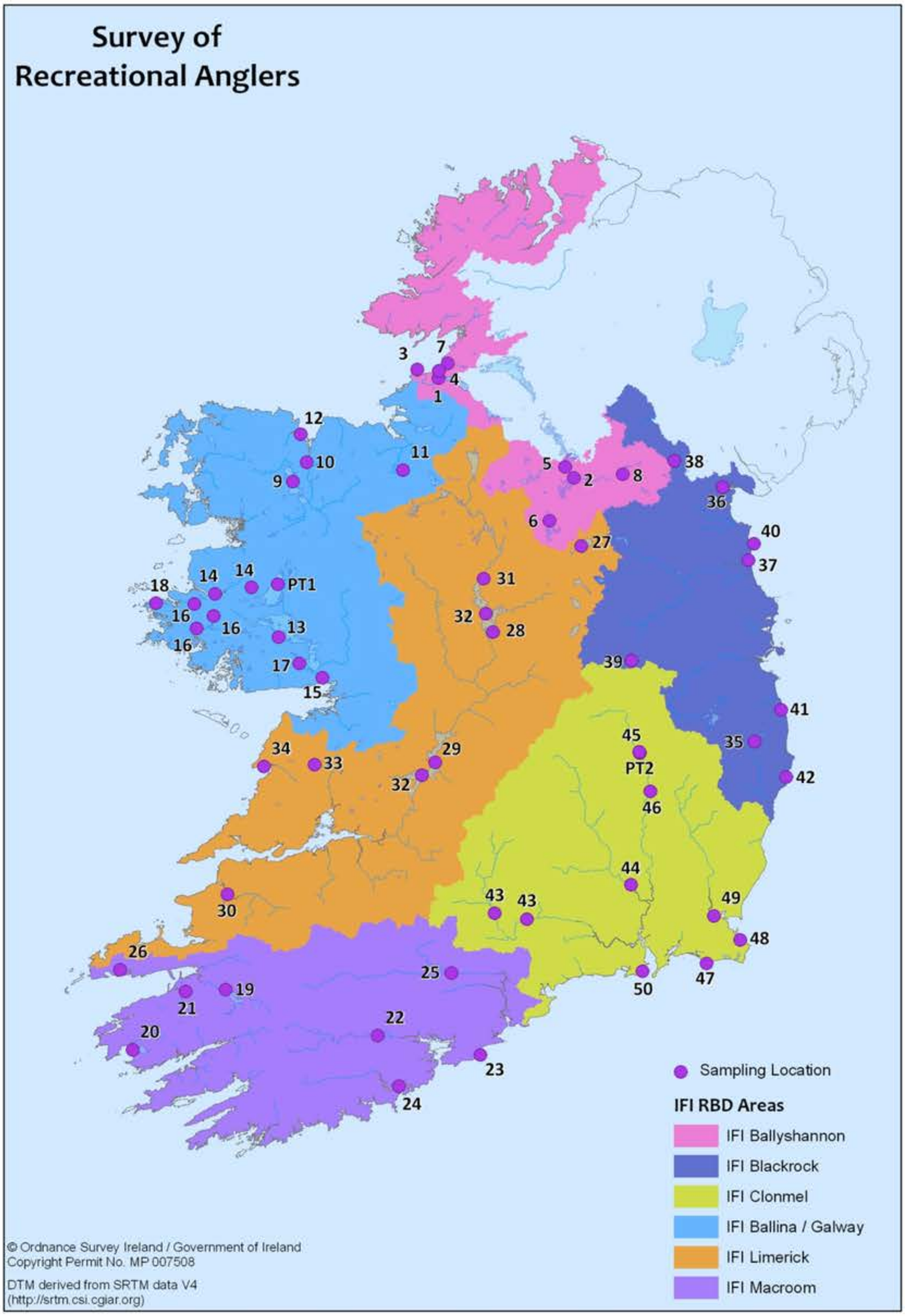
| 12 | On-line Survey – German Anglers | Fáilte Ireland | G J Media | 2012 |
| 13 | Survey of GB Anglers | Fáilte Ireland | Go Fishing | 2011 |
| 14 | European Anglers Alliance Socio-Economic Studies Overview | EAA | EAA | |
| 15 | Economic Benefits of Angling | Angling Trades Association | Dr Bruno Broughton (ATA) | 2007 |

# Appendix B

## Survey of Recreational Anglers – Sampling Details (Interviewing Locations)

## APPENDIX B - SURVEY OF RECREATIONAL ANGLERS – SAMPLING LOCATIONS AND RIVER BASIN DISTRICTS (RBDS)



| Assignment No | Fishery/Location | Date Undertaken | RBD | Species Targeted |
|---|---|---|---|---|
| PT1 | Lough Mask/Corrib | 24/03/2012 | Western RBD | Brown Trout |
| PT2 | Athy / Barrow River | 25/03/2012 | South Eastern RBD | Pike/Coarse |
| 1 | Lough Melvin/Garrison/ Rossinver/Gowna | 16/06/2012 to 23/06/2012 | North Western RBD | Brown Trout/Salmon |
| 2 | Butlersbridge/Sheelin | 22/09/2012 to 06/10/2012 | North Western RBD | Brown Trout/Salmon |
| 3 | Drowes River | 13/04/2012 | North Western RBD | Brown Trout/Salmon |
| 4 | Erne Estuary/Ballyshannon | 14/07/2012 to 26/08/2012 | North Western RBD | Sea Trout |
| 5 | Belturbet Coarse | 09/09/2012 | North Western RBD | Pike |
| 6 | Gowna | 26/08/2012 to 01/09/2012 | North Western RBD | Coarse |
| 7 | Bundoran Pier/Monaghmore/ Creevy Pier | 15/07/2012 to 25/08/2012 | North Western RBD | Sea |
| 8 | Cootehill/Shercock Coarse Fisheries | Cancelled | North Western RBD | Coarse/Pike |
| 9 | Lough Conn | 30/05/2012 | Western RBD | Brown Trout/Salmon |
| 10 | Ballina/Foxford/ Ridge Pool | 13/07/2012 to 22/07/2012 | Western RBD | Salmon/Sea Trout |
| 11 | Ballymote | 10/11/2012 to 11/11/2012 | Western RBD | Coarse |
| 12 | Westport | 07/10/2012 | Western RBD | Sea |
| 13 | Lough Corrib | 05/05/2012 | Western RBD | Brown Trout |
| 14 | Galway Weir | 09/07/2012 to 19/07/2012 | Western RBD | Salmon |
| 15 | Delphi/Erriff | 13/09/2012 to 20/09/2012 | Western RBD | Salmon |
| 16 | Inagh | 29/08/2012 to 28/09/2012 | Western RBD | Sea Trout |
| 17 | Moycullen | 01/11/2012 | Western RBD | Pike/Coarse |
| 18 | Barna Pier/Cleggan | 04/09/2012 to 13/10/2012 | Western RBD | Sea |
| 19 | Lough Leane | 19/05/2012 | South Western RBD | Brown Trout/Salmon |
| 20 | Waterville Currane | 06/07/2012 to 23/09/2012 | South Western RBD | Brown Trout/Seat Trout/Salmon |
| 21 | Glencar | 21/08/2012 to 15/09/2012 | South Western RBD | Sea Trout/Salmon/Brown Trout |
| 22 | Iniscarra Lake/Lee River | 20/05/2012 to 05/11/2012 | South Western RBD | Pike/Coarse |
| 23 | Cork Harbour | 10/07/2012 to 05/10/2012 | South Western RBD | Sea/Bass |
| 24 | Kinsale | 07/07/2012 to 08/07/2012 | South Western RBD | Sea |
| 25 | Blackwater | 24/07/2012 to 14/08/2012 | South Western RBD | Salmon |

| | | | | |
|---|---|---|---|---|
| 26 | Dingle | 01/07/2012 to 05/10/2012 | South Western RBD | Sea/Bass |
| 27 | Lough Sheelin | 23/05/2012 | North Western RBD | Brown Trout |
| 28 | Lough Ree | 24/05/2012 | Shannon RBD | Brown Trout |
| 29 | Lough Derg | 23/09/2012 | Shannon RBD | Coarse/Pike |
| 30 | Enniscrone | 10/11/2012 | Western RBD | Salmon/Sea Trout |
| 31 | Lough Ree | 18/04/2012 | Shannon RBD | Coarse/Pike |
| 32 | Shannon Lakes | Cancelled | Shannon RBD | Coarse |
| 33 | Inchiquin Lake/ River Fergus | Cancelled | Shannon RBD | Brown Trout |
| 34 | Lahinch/Doolin | 20/10/2012 to 26/10/2012 | Shannon RBD | Sea/Bass |
| 35 | Annamoe | 11/08/2012 | Eastern RBDs | Brown Trout |
| 36 | Inniskeen/Fane | 01/10/2012 to 12/10/2012 | Eastern RBDs | Salmon/Sea Trout |
| 37 | Boyne | 15/09/2012 to 30/9/2012 | Eastern RBDs | Salmon/Sea Trout |
| 38 | Lough Muckno | 17/09/2012 | South Eastern RBD | Pike/Coarse |
| 39 | Edenderry | 06/06/2012 | Shannon RBD | Coarse |
| 40 | Dundalk Bay/Greenore/ Clogherhead | 15/10/2012 to 10/11/2012 | Eastern RBDs | Sea |
| 41 | Greystones | 01/09/2012 | Eastern RBDs | Sea |
| 42 | Courtown | 11/11/2012 | North Western RBD | Bass |
| 43 | River Suir | 01/06/2012 | South Eastern RBD | Brown Trout |
| 44 | River Nore | 29/09/2012 | South Eastern RBD | Salmon/Trout |
| 45 | Athy | 14/10/2012 | Eastern RBDs | Pike/Coarse |
| 46 | Barrow River / Grand Canal | 22/04/2012 | South Eastern RBD | Coarse/Pike |
| 47 | Kilmore Quay | 19/06/2012 | South Eastern RBD | Sea |
| 48 | Rosslare | 14/09/2012 | South Eastern RBD | Bass |
| 49 | Courtown | 04/11/2012 | South Eastern RBD | Salmon/Sea Trout/Brown Trout |
| 50 | Dunmore East | 25/08/2012 | South Eastern RBD | Sea |

# Appendix C

- Survey of Recreational Anglers
- Household Survey
- Survey of Angling Stakeholders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# APPENDIX C - QUESTIONNAIRES

## SURVEY OF RECREATIONAL ANGLERS

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**Good morning / afternoon / evening. I am ................................ from Tourism Development International. We are conducting a survey of recreational anglers on behalf of Inland Fisheries Ireland and I would be grateful for your help in answering some questions. The interview will take around 15 minutes of your time and will contribute to the future of angling in Ireland.**

--------------------------------------------------------- ▯ ---------------------------------------------------------

INTERVIEWER: **If respondent is willing to participate in the survey but would prefer to be interviewed at a later date, please record name and contact details as per interviewer guidelines.**

INTERVIEWER: **Establish if angler is <u>domestic</u> (Irish resident) or <u>overseas visitor</u>. For domestic,** please code the categories below.
N.B.1. Domestic includes Irish nationals and non-nationals living in Ireland.
N.B.2. Domestic includes residents of Northern Ireland.

**A.1 RESIDENCE**

| | |
|---|---|
| *Domestic – Local* | *1* |
| Domestic – Day Visitor | 2 |
| Domestic – Overnight Visitor | 3 |
| Overseas | 4 |

**A.2 FISHERY/LOCATION** ________________________________

**A.3 ASSIGNMENT NO.** [ ][ ]

**A.4 RBD**

| | |
|---|---|
| Eastern and Neagh Bann RBDs (Wicklow, Kildare, Dublin, Meath, Louth) | 1 |
| South Eastern RBD (Wexford, Waterford, Carlow, Kilkenny, Laois, Tipperary) | 2 |
| South Western RBD (Cork & Kerry) | 3 |
| Western RBD (Galway, Mayo, Sligo) | 4 |
| North Western RBD (Donegal, Leitrim, Monaghan, Cavan) | 5 |
| Shannon RBD (Clare, Limerick, North Tipperary, Offaly Westmeath, Roscommon & Longford) | 6 |

**A.5 DATE (write in........................................)** day [ ][ ] month [ ][ ]

**A.6 DAY OF WEEK (Monday=1, Tuesday=2, etc)** [ ]

**SECTION A – TRIP DETAILS AND PLANNING**

Q1. On how many occasions have you fished at this fishery/location previously?

*NUMBER OF PREVIOUS OCCASIONS AT THIS FISHERY*

**RECORD NUMBER OF OCCASIONS OPPOSITE – IF FIRST TIME CODE 0, IF MORE THAN 100 CODE 99**

**ASK OVERSEAS ANGLERS ONLY**

Q2. And on how many occasions have you participated in fishing in Ireland?

*NUMBER OF PREVIOUS OCCASIONS IN IRELAND*

**ASK ALL**

Q3. What is the most appealing aspect of Ireland as a destination for recreational angling? What, if anything, makes Ireland unique?

**WRITE IN VERBATIM BELOW**

Q4. And what are Ireland's least appealing aspects as a destination for recreational angling? What, if any, do you particularly dislike?

**WRITE IN VERBATIM BELOW**

**SHOW THIS TABLE TO RESPONDENT**

Q5. Which of the following sources of information do you use when choosing your fishery/angling location?

**MULTI-CODE OPPOSITE**

| | |
|---|---|
| No specific information used/ familiar with fishery | 1 |
| Tourist Information Office: | |
| • In destination | 2 |
| • In own country | 3 |
| Newspaper (Specify ……………………………) | 4 |
| Magazine (Specify ……………………………) | 5 |
| Television (Specify ……………………………) | 6 |
| Radio (Specify ……………………………) | 7 |
| Travel agent / tour operator | 8 |
| Friend / Relative / Word of Mouth | 9 |
| Internet | 10 |
| Inland Fisheries Ireland (IFI) | 11 |
| Guide Book (Specify ……………………………) | 12 |
| Brochure / leaflet (Specify ……………………) | 13 |
| Other (Specify ……………………………) | 14 |

Q6. Please indicate the months of the year when you go fishing in Ireland

**MULTI-CODE OPPOSITE**

| *TIMING OF ANGLING* | |
|---|---|
| January | 1 |
| February | 2 |
| March | 3 |
| April | 4 |
| May | 5 |
| June | 6 |
| July | 7 |
| August | 8 |
| September | 9 |
| October | 10 |
| November | 11 |
| December | 12 |

**SECTION B – RATING OF IRISH ANGLING PRODUCT**

**ASK ALL**

**SHOW THIS TABLE TO RESPONDENT**

**Q7a.How would you rate the following aspects of the Irish fishing product in Ireland?**

**Q7b. Why are you not satisfied with this aspect of the Irish fishing product?**

**ASK FOR EACH ASPECT RATED FAIR/POOR/ VERY POOR**

**CODE IN GRID BELOW**

| | Q7a. | | | | | | Q7b. |
|---|---|---|---|---|---|---|---|
| **READ OUT** | Very Good | Good | Fair | Poor | Very Poor | Don't Know/No Reply | Reasons |
| Ease of travel/Convenience | 1 | 2 | 3 | 4 | 5 | 6 | |
| Reputation of the fishing product | 1 | 2 | 3 | 4 | 5 | 6 | |
| Rest and relaxation | 1 | 2 | 3 | 4 | 5 | 6 | |
| Overall quality of angling | 1 | 2 | 3 | 4 | 5 | 6 | |
| Fish Stocks | 1 | 2 | 3 | 4 | 5 | 6 | |
| Quality of Catch | 1 | 2 | 3 | 4 | 5 | 6 | |
| Availability of Bait / Tackle Shops | 1 | 2 | 3 | 4 | 5 | 6 | |
| Boat Hire / Ghillies | 1 | 2 | 3 | 4 | 5 | 6 | |
| Club waters | 1 | 2 | 3 | 4 | 5 | 6 | |
| Water Quality | 1 | 2 | 3 | 4 | 5 | 6 | |
| Bio Security (Protection of fishery from alien species) | 1 | 2 | 3 | 4 | 5 | 6 | |
| Range of fisheries in this region | 1 | 2 | 3 | 4 | 5 | 6 | |
| Quality of information on angling (i.e. IFI, ghillies etc.) | 1 | 2 | 3 | 4 | 5 | 6 | |
| Eating out / dining facilities | 1 | 2 | 3 | 4 | 5 | 6 | |
| Entertainment and recreation options near the fishery | 1 | 2 | 3 | 4 | 5 | 6 | |
| Quality of accommodation near the fishery | 1 | 2 | 3 | 4 | 5 | 6 | |
| Scenery, countryside, environment | 1 | 2 | 3 | 4 | 5 | 6 | |
| Friendliness / Local welcome | 1 | 2 | 3 | 4 | 5 | 6 | |
| Value for money | 1 | 2 | 3 | 4 | 5 | 6 | |
| Other (specify ……………………….....) | 1 | 2 | 3 | 4 | 5 | 6 | |

**ASK OVERSEAS ANGLERS**

**SHOW THIS TABLE TO RESPONDENT**

Q8. How likely are you to return to Ireland or to recommend a trip to family/friends in the next three years for either of the following?

**PROBE IN RELATION TO FISHING HOLIDAY AND GENERAL HOLIDAY**

| | Fishing Holiday | General Holiday |
|---|---|---|
| Very Likely | 1 | 1 |
| Quite Likely | 2 | 2 |
| Not very Likely | 3 | 3 |
| Not at all Likely | 4 | 4 |
| Don't Know/No Reply | 5 | 5 |

**ASK ALL**

**Q9. What initiatives would you like to see implemented to improve angling in Ireland?**

**WRITE IN VERBATIM BELOW**

| | SUGGESTED IMPROVEMENTS |
|---|---|
| AT THIS PARTICULAR FISHERY/LOCATION | |
| IN GENERAL | |

**SECTION "C" – IRELAND'S COMPETITION**

**ASK ALL**

Q10. Have you taken a holiday trip involving fishing in countries other than Ireland over the past 3 years?

**For overseas anglers, this refers to trips taken OUTSIDE own country**

| | |
|---|---|
| Yes | 1 |
| No | 2 |

**IF FOREIGN TRIP TAKEN FOR ANGLING IN PAST 3 YEARS, ASK**

Q11. Apart from Ireland, what other countries have you visited on holiday in the past 3 years during which you went fishing?

**MULTI CODE OPPOSITE**

| | |
|---|---|
| Britain - England | 1 |
| - Scotland | 2 |
| - Wales | 3 |
| France | 4 |
| Germany | 5 |
| Netherlands | 6 |
| Italy | 7 |
| Norway | 8 |
| Sweden | 9 |
| Denmark | 10 |
| Spain | 11 |
| Canada | 12 |
| USA | 13 |
| Other (Specify.) ………………………………… | 14 |

**Q12.What is the most appealing aspect of _______________ (countries visited at Q11) as a destination for fishing? What makes these countries special?**

**WRITE IN VERBATIM BELOW**

| Country | *Reasons* |
|---|---|
| | |
| | |
| | |

## SECTION "D" – EXPENDITURE

| | *EXPENDITURE ON THIS TRIP* | | |
|---|---|---|---|
| Q13(a). Thinking about this current fishing trip, how much did you spend (or do you expect to spend) on each of the following items? | Fishing tackle | € | |
| | Bait | € | |
| | Permit | € | |
| | Salmon Licence | € | |
| | Ghillies | € | |
| **RECORD EXPENDITURE UNDER EACH CATEGORY OPPOSITE** | Boat Hire | € | |
| | Food and Drink | € | |
| | Accommodation | € | |
| | Flight/Ferry | € | |
| | Transport in Ireland (i.e petrol, car hire etc) | € | |
| | Retail (i.e. books, maps etc.) | € | |
| | Clothing | € | |
| | Competition Fees | € | |
| | Other (specify……………..) | € | |
| | **TOTAL EXPENDITURE THIS TRIP** | € | |

Q13(b). How many individuals does this expenditure relate to?

**NUMBER OF INDIVIDUALS EXPENDITURE RELATES TO**

**IF DOMESTIC OVERNIGHT OR OVERSEAS VISITOR TO THE REGION ASK**

| | | |
|---|---|---|
| Q13(c). Overall, how many days on this current trip do you plan to stay?<br><br>**CODE OPPOSITE** | | DAYS |
| | Stay in total | ☐☐ |
| | Engage in fishing | ☐☐ |

**ASK ALL**

| | | |
|---|---|---|
| | | FISHING TRIPS IN PAST 12 MONTHS |
| Q14(a). How many trips have you taken in Ireland during which you went fishing in the past 12 months? | Number of trips anywhere in Ireland in last 12 months | ☐☐ |
| Q14(b). And how many trips have you taken to this particular fishery in the past 12 months?<br><br>**RECORD OPPOSITE** | Number of trips to this fishery in last 12 months | ☐☐ |

| | | DISTANCE TO FISHERY (MILES) | or (KILOMETRES) |
|---|---|---|---|
| Q15(a). Approximately how far do you travel when you undertake a fishing trip in Ireland? (i.e. one way from home to fishing location) | Distance travelled on average fishing trip in Ireland | ☐☐☐ | ☐☐☐ |
| Q15(b). And how far did you travel on this occasion?<br><br>**RECORD OPPOSITE** | Distance travelled to this fishery on this occasion | ☐☐☐ | ☐☐☐ |

**ASK DOMESTIC ANGLERS ONLY**

| | *ANNUAL EXPENDITURE ON FISHING* | |
|---|---|---|
| Q16. Approximately how much do you spend each year on fishing? | Fishing tackle | € |
| | Bait | € |
| | Permits | € |
| | Salmon Licence | € |
| | Ghillies | € |
| **RECORD EXPENDITURE UNDER EACH CATEGORY OPPOSITE** | Boat Hire | € |
| | Food and Drink | € |
| | Accommodation | € |
| | Transport in Ireland (i.e petrol, car hire etc) | € |
| | Clothing | € |
| | Competition Fees | € |
| | Other (specify……………..) | € |
| | **TOTAL** | € |

**ASK ALL**

Q17. How much would you be willing to pay each year, through general taxation, for the next 10 years, to preserve the current fish stocks and current quality of recreational fishing in Ireland? **Please note it is not IFI's intention to reintroduce a rod licence.**

| **PAYMENT CARD** | | | |
|---|---|---|---|
| €0 | €8 | €30 | €100 |
| €1 | €10 | €35 | €125 |
| €2 | €15 | €45 | €150 |
| €3 | €20 | €60 | €200 |
| €5 | €25 | €80 | > €200 |

Q18. If €0 was chosen: Can you tell me what was your main reason for choosing the €0 option?

CODE OPPOSITE

| | |
|---|---|
| I cannot afford to pay | 1 |
| I object to paying taxes | 2 |
| The quality of the fish stocks in Ireland are not important to me | 3 |
| The Government/Council/other body should pay | 4 |
| I don't believe the improvements will actually take place | 5 |
| Don't know | 6 |
| Other (please specify) | 7 |

## SECTION E – CLASSIFICATION DETAILS

***NAME OF RESPONDENT***

**ADDRESS** ……………………………………..
…………………………………………………………………
…………………………………………………………………
TEL NUMBER:…………………………………………….
MOBILE:……………………………………….
E-MAIL ADDRESS: …………….……………

***C1 ANGLING CATEGORY (MAIN QUARRY)***

| | |
|---|---|
| • Game - Salmon | 1 |
| - Sea Trout | 2 |
| - Brown Trout | 3 |
| • Pike | 4 |
| • Coarse | 5 |
| • Sea (Excluding Bass) | 6 |
| • Bass | 7 |

**C2. COUNTRY OF RESIDENCE**

| | |
|---|---|
| • Ireland - Republic of Ireland | 1 |
| • - Northern Ireland | 2 |
| • US | 3 |
| • Canada | 4 |
| • Britain | 5 |
| • Germany | 6 |
| • France | 7 |
| • Netherlands | 8 |
| • Italy | 9 |
| • Other Europe (Specify ……………) | 10 |
| • Other Non-Europe | 11 |
| (Specify …………………………..) | 12 |

***C3. GENDER***

| | |
|---|---|
| • Male | 1 |
| • Female | 2 |

**C4. AGE**

| | | | |
|---|---|---|---|
| • 18-24 | 1 | • 45-54 | 4 |
| • 25-34 | 2 | • 55-64 | 5 |
| • 35-44 | 3 | • 65+ | 6 |

***C5. OCCUPATION***

*Record : **(If retired or self employed record previous/current occupation)**……………………………………………*

| | | | |
|---|---|---|---|
| • AB | 1 | • C2 | 3 |
| • C1 | 2 | • DE | 4 |

***C6. ANNUAL GROSS INCOME***

| | |
|---|---|
| • Less than €6000 | 1 |
| • €6000 to under €12000 | 2 |
| • €12000 to under €18000 | 3 |
| • €18000 to under €24000 | 4 |
| • €24000 to under €30000 | 5 |
| • €30000 to under €36000 | 6 |
| • €36000 to under €60000 | 7 |
| • €60000 to under €90000 | 8 |
| • €90000 to under €120000 | 9 |
| • €120000 or more | 10 |
| • Refused | 11 |

Specify Actual €……………………….
US$…………………….
Stg£ …………………….

Interviewer's Name : ……………………………

**C7. PARTY COMPOSITION**

| | |
|---|---|
| • Travelling Alone | 1 |
| • With family | 2 |
| • With friends/relatives | 3 |
| • With party of fishermen | 4 |
| • Other | 5 |
| (Specify ……………………………) | |

**C8. PARTY SIZE**

How many people aged 16 years and over are there, including yourself, in your IMMEDIATE PARTY ☐☐

How many people aged 15 years and under Are there, including yourself, in your IMMEDIATE PARTY ☐☐

**C9. LOCATION /TYPE OF FISHERY**

| | |
|---|---|
| • Lake | 1 |
| • River | 2 |
| • Estuary | 3 |
| • Put and take fishery | 4 |
| • Canal | 5 |
| • Sea Shore/Harbour/Rocks | 6 |
| • Beach | 7 |
| • In shore/Small craft | 8 |
| • Deep Sea | 9 |

**C10. MAIN TYPE OF ACCOMMODATION USED (domestic overnight and overseas visitors)** SINGLE CODE

| | |
|---|---|
| • Hotel | 1 |
| • B&B/ Farmhouse | 2 |
| • Guesthouse | 3 |
| • Self Catering Chalet / Apartment | 4 |
| • Hostel | 5 |
| • Caravan & Camping | 6 |
| • Home of Friends and family | 7 |
| • Other | 8 |
| (Specify…………………………..) | |

**C11. TRANSPORT USED**

| | |
|---|---|
| • Own car | 1 |
| • Hired car | 2 |

***C12. MEMBERSHIP OF FISHING CLUB***

| | |
|---|---|
| • Yes, member of fishing club | 1 |
| • Not member of fishing club | 2 |

Indicate number of clubs respondent is member of

Club Name: ______________________ ☐☐

**C13. WOULD YOU BE WILLING TO PARTICIPATE *IN FOLLOW UP RESEARCH***

| | |
|---|---|
| • Yes | 1 |
| • No | 2 |

*I certify that this interview has been carried out accordance with your instructions.*

Date of Interview : …………………………………

**INTERVIEWER : THANK RESPONDENT FOR HIS/HER CO-OPERATION ON THIS SURVEY**

**INTERVIEWER: READ OUT IF RESPONDENT REQUESTS ADDITIONAL INFORMATION AT Q17**

**Inland Fisheries Ireland [IFI] is trying to establish the value of the Irish Fishing Resource. Natural fish stocks in Ireland are threatened in several ways e.g reduced water quality, barriers to fish and other fauna migration, industry and household sewage. European Directives and national programs to combat the threats on the health of our fish stocks have been put in place. These programs will cost money. The costs are uncertain but part of the costs will have to be paid by the taxpayer. Any payment would involve an increase in your annual income tax or VAT, for the next 10- years. All money raised would be used for the preservation of the fish stocks. Think what it is worth to you to preserve the natural fish stocks and the current quality of recreational fishing in Ireland. Note that these costs are in addition to any charges you may already pay for your fishing experiences.**

**41111529**

**Tourism Development International**
**(on behalf of Inland Fisheries Ireland)**


## ASK ALL AGED 15+

***Introduction: This short section relates to outdoor leisure activities.***

**Q.1 Have you EVER participated in any of these leisure activities?**

*Interviewer: Read out, code all the apply*
*Scriptor: muticode*
*Filter: Ask all*

1: Golf - **(Go to Q1a)**
2: Angling/fishing - **(Go to Q1a)**
3: Hiking/walking -**(Go to Q1a)**
4: Running - **(Go to Q1a)**
5: Cycling -**(Go to Q1a)**
6: Sailing -**(Go to Q1a)**
7: None (do not read out) -**(Skip to Q.9)**

**Q.1a And which, if any, have you participated in the LAST 12 MONTHS?**

*Interviewer: tick all that apply*
*Scriptor: include answers given from Q1 only*
*Filter: Ask if code 1-6 answered at Q1*

1: Golf
2: Angling/fishing **(If "Yes"Go to Q2) (If Code 2 at Q1 and Code 2 not ticked at Q1a- go to Q6)**
3: Hiking/walking
4: Running
5: Cycling
6: Sailing
7: None (do not read out) **Skip to Q9**
**If answered 1-6 and NOT Code 2 go to Q9**

**Q2. In the last 12 months how many DAY fishing trips have you taken in Ireland? By day fishing trips I mean a trip that lasted a few hours and you returned home the same night:**

Interviewer: tick all that apply
Filter: Ask if code 2 at Q1a

Scripter: open numeric, if 0 go to Q3

**Q2a. Now I would like to ask you some questions about your DAY fishing trips. What type of species did you fish for on your DAY trips in the past 12 months?**

*Interviewer: Showcard C1, tick all that apply*
*Filter: Ask if answer greater than 0 at Q2 (others skip to Q3)*
*Scripter: MC .Don't know= no MC*

Pike
Other Coarse Fish
Salmon only
Sea Trout only
Salmon and Sea Trout combined
Brown Trout
Bass
Other sea fish

Don't know/can't remember

**Q2b. You said you spent X (enter number from Q2) days fishing during the past 12 months. Approximately how many DAY trips were targeted at:**

*Scripter: question to be asked for each code given at Q2a .*
*Open numeric*

**Statements:**
Pike
Other Coarse Fish
Salmon only
Sea Trout only
Salmon and Sea Trout combined
Brown Trout
Bass
Other sea fish

**Scale:**

*Scripter: Open numeric, 3 digits*
Don't know =99

**Q2c. And which of the following regions did you visit in the last 12 months on DAY fishing trips:**

*Interviewer: showcard C2, tick all that apply*
*Scripter: MC .Don't know- no MC*
East (Louth, Meath, Dublin, Wicklow)
South East (Wexford, Waterford, Carlow, Kilkenny)
South (Cork Kerry)
West (Clare, Galway, Mayo, Sligo)
North West (Donegal, Leitrim)
North Midlands (Cavan, Monaghan, Roscommon, etc.)
South Midlands (Laois Offaly, Tipperary etc.)

Don't know/can't remember

**Q2d. You said you spent X** *(scripter insert number given at Q2a)* **DAYs fishing:**

How many of those did you spend in:

*Scripter: ask for each code specified at Q2c. Open numeric*

**Statement:**
East (Louth, Meath, Dublin, Wicklow)
South East (Wexford, Waterford, Carlow, Kilkenny)
South (Cork Kerry)
West (Clare, Galway, Mayo, Sligo)
North West (Donegal, Leitrim)
North Midlands (Cavan, Monaghan, Roscommon, etc.)
South Midlands (Laois Offaly, Tipperary etc.)

**Scale**
*Scripter: Open numeric, 3 digits*

*Interviewer: Don't know = 99*

**Q3. In the last 12 months how many OVERNIGHT fishing trips have you taken in Ireland? By overnight trips we mean fishing trips where you stayed away from home and returned the following day or after a few days. This is counted as one trip**

*Scripter: open numeric, 3 digit*
*filter: ask if code 2 at Q1a*

Don't know = 99

*Scripter: If 0 skip to Q5*

**Q3a. On your most recent OVERNIGHT angling trip how many nights did you spend away from home?**

*Scripter: Ask if number greater than 0 at Q3,*

*Open numeric*
Don't know 99

**Q3b. Now I want to ask you about your OVERNIGHT trips taken in the last 12 months in Ireland You said you took X** *(scripter insert number given at Q3).* **Looking at this card (interviewer showcard C1) please tell me which species you fished for?**

*Interviewer: Showcard C1, tick all that apply*
*Filter: Ask if number at Q3 is greater than 0, others skip to Q5*
*Scripter: MC .Don't know- no MC*

Pike
Other Coarse Fish
Salmon only
Sea Trout only
Salmon and Sea Trout combined
Brown Trout
Bass
Other sea fish

Don't know/can't remember

**Q3c. You mentioned you took X** *(scripter insert number given at Q3)* **OVERNIGHT trips. How many of these were targeted at:**

*Scripter: question to be asked for each code given at Q3b) . Open numeric 3 digit*

**Statements**
Pike
Other Coarse Fish
Salmon only
Sea Trout only
Salmon and Sea Trout combined
Brown Trout
Bass
Other sea fish

**Scale**
*Scripter: Open numeric, 3 digits*

*Interviewer: Don't know = 99*

**Q3d. And which of the following regions did you visit on OVERNIGHT fishing trips:**

*Scripter: MC .Don't know- no MC*
Interviewer showcard C2, tick all that apply
East (Louth, Meath, Dublin, Wicklow)
South East (Wexford, Waterford, Carlow, Kilkenny)
South (Cork Kerry)
West (Clare, Galway, Mayo, Sligo)
North West (Donegal, Leitrim)
North Midlands (Cavan, Monaghan, Roscommon, etc.)
South Midlands (Laois Offaly, Tipperary etc.)

Don't know

**Q3e. You said you went on X (scripter insert number given at Q3a) OVERNIGHT fishing trips in Ireland**
**Over the past 12 months. How many of those did you spend in:**

Scripter: Ask for reach region specified at Q3d, open numeric

**Statement:**
East (Louth, Meath, Dublin, Wicklow)
South East (Wexford, Waterford, Carlow, Kilkenny)
South (Cork Kerry)
West (Clare, Galway, Mayo, Sligo)
North West (Donegal, Leitrim)
North Midlands (Cavan, Monaghan, Roscommon, etc.)
South Midlands (Laois Offaly, Tipperary etc.)

**Scale**
*Scripter: Open numeric, 3 digits*

*Interviewer: Don't know = 99*

***No question 4***

**Q5. Thinking about all your spending on recreational fishing, over the past 12 months , approximately how much have you spent on each of the following? This includes both DAY or OVERNIGHT fishing trips where applicable**

Interviewer: probe for an approximate amount
Scripter: open ended numeric category-4 digits
Filter: Ask all who answered code 2 at Q1a

1: Fishing Tackle (rods, reels, lines, lures, flies etc.)
2: Bait
3: Boats, engines (excluding hire)
4: Boat hire, ghillies, guides
5: Food and drink
6: Accommodation
7: Transport
8: Other items related to fishing
9: Licence
10: Permits and/or Beats

**Q.6 How likely would you be to participate in recreational angling in the future?**

Interviewer: Read out- single code
Scriptor: Single code
Filter: Ask all answered code 2 at Q1 (have fished previously)

1: Very likely
2: Quite Likely
3: Neither likely nor unlikely
4: Fairly unlikely
5: Very unlikely

**Q.7 What, if anything, would encourage you to participate in Recreational Angling in the future?**

Interviewer: Do not prompt. Probe to pre-codes. Code all the apply
Scriptor: Multicode and one open ended
Filter: **Ask all answered code 3, 4 or 5 at Q.6**

1: If I had more Leisure time
2: Cheaper fishing tackle/equipment
3: If there was more information on fisheries available in my area
4: Angling 'Open DAY'- Free trial at fishery in my area
5: Improved signposting of fisheries
6: Encouragement from friends that fish
7: Fishery Awareness DAY/Family friendly activities
8: Information on getting started/How to fish
9: Improved fish stocks
10: Improved physical access to fisheries[Rivers,Lakes and Sea]
11: Greater availability of artificial[put and take] fisheries
12: Other (Specify) (Scriptor: Open ended question)

**Q8.**

**Are you affiliated with any angling club or association?**

1: Yes - **(specify name(s) of club(s)/association(s))**
2: No

**Q.9- Filter: ASK ALL-**

**Interviewer: READ OUT SLOWLY**

**Scriptor: Single code**

Natural fish stocks in the Ireland are threatened in several ways e.g. reduced water quality, barriers to fish migration, industry and household sewage. European Directives and national programmes to combat the threats on the health of our fish stocks have been put in place. These programmes will cost money. The costs are uncertain but part of the costs will have to be paid by the taxpayer. I would like you to think about what it is worth to you to preserve the natural fish stocks and the current quality of recreational fishing in Ireland.

Assuming all money raised would be used for the preservation of the fish stocks, what amount on this card is the **maximum** that you would be willing to pay **each** year through an increase in your annual income tax or VAT, for the next 10 years? Note that these costs are in addition to any charges you may already pay for fishing or any contribution you make to nature conservation.

| **PAYMENT CARD** | | | |
|---|---|---|---|
| €0 ***go to Q8b*** | €8 | €30 | €100 |
| €1 | €10 | €35 | €125 |
| €2 | €15 | €45 | €150 |
| €3 | €20 | €60 | €200 |
| €5 | €25 | €80 | More than €200 |

**Q.9b**

**Can you tell me what was your main reason for choosing the €0 option?**

Interviewer: Do not read out –probe to pre-codes. Code main reason
Scriptor: Rotate answers, single code
Filter: All answered "0" at Q1

1: I cannot afford to pay
2: I object to paying taxes
3: I pay enough taxes already
4: The quality of the fish stocks in Ireland are not important to me
5: The Government/Council/other body should pay
6: I don't believe the improvements will actually take place
7: Other (specify) .
8: Don't know

## Survey of Angling Stakeholders

Iascach Intíre Éireann
Inland Fisheries Ireland

**Tourism Development International (TDI) has been appointed by Inland Fisheries Ireland (IFI) to carry out a Socio-Economic Survey of Recreational Angling in Ireland. As part of this research project, we are undertaking research with angling stakeholders and would be most grateful for your help in answering some questions.**

**Q1.** What proportion of your customers engage in angling? [ ]

**Q2.a** Which of the following categories of angling do your customers engage in?

- ☐ Salmon
- ☐ Sea Trout
- ☐ Brown Trout
- ☐ Pike
- ☐ Coarse
- ☐ Sea
- ☐ Bass

Q2.b Has the number of customers participating in ............. (category of angling mentioned at Q2a) increased, remained the same or decreased over the last five years?

| | *Increased* | *Same* | *Decreased* |
|---|---|---|---|
| Salmon | ○ | ○ | ○ |
| Sea Trout | ○ | ○ | ○ |
| Brown Trout | ○ | ○ | ○ |
| Pike | ○ | ○ | ○ |
| Coarse | ○ | ○ | ○ |
| Sea | ○ | ○ | ○ |
| Bass | ○ | ○ | ○ |

**Q2.c** **What factors in your opinion have contributed to the increase/decrease in participation in ............. (categories mentioned at Q2a/Q2b)?**

**Q2.d How significant have each of the following factors been in influencing any change in the number of customers you have participating in angling?**

| | *Very Significant* | *Quite Significant* | *Not very Significant* | *Not at all Significant* |
|---|---|---|---|---|
| Cost of Angling | ○ | ○ | ○ | ○ |
| Regulations (Bag limits and methods) | ○ | ○ | ○ | ○ |
| License | ○ | ○ | ○ | ○ |
| Quality of Fishing | ○ | ○ | ○ | ○ |
| Cost of Travel | ○ | ○ | ○ | ○ |
| Cost of Accommodation | ○ | ○ | ○ | ○ |
| Cost of Food and Drink | ○ | ○ | ○ | ○ |
| Economic Situation | ○ | ○ | ○ | ○ |
| Other (Specify) | ○ | ○ | ○ | ○ |

Q3. Thinking about the same timeframe (i.e. past 5 years) what trends have you observed in relation to your angling customers in terms of the following:

(a). The **number of angling customers** from each of the following markets compared to five years ago?

| | *Increased* | *Same* | *Decreased* |
|---|---|---|---|
| Republic of Ireland | | | |
| Northern Ireland | | | |
| Britain | | | |
| France | | | |
| Germany | | | |
| Netherlands | | | |
| Belgium | | | |
| Denmark | | | |
| Italy | | | |
| Spain | | | |
| Other Europe | | | |

Specify Other Europe:

| | *Increased* | *Same* | *Decreased* |
|---|---|---|---|
| North America | | | |
| Other Non Europe | | | |

Specify Other Non Europe:

Q3.b What is the current **average length of stay** for your angling customers?
RECORD FOR EACH MARKET AREA

Republic of Ireland

Britain

Europe

North America

Q3.c Average length of stay (i.e. Days) of angling customers compared to five years ago?

- Increased
- Remained the Same
- Decreased

**Q3.d** **Expenditure levels of angling customers compared to five years ago?**

- ○ Increased
- ○ Remained the Same
- ○ Decreased

**Q3.e** **In terms of seasonality, is your season longer, the same, or shorter than it was five years ago?**

- ○ Shorter season
- ○ Remained the Same
- ○ Longer season

**IF SHORTER/LONGER SEASON**

**Q3f.** **What factors have impacted on the length of season?**

**Q4a. How would you rate the following aspects of the fishing product in Ireland?**

| | *Very Good* | *Good* | *Fair* | *Poor* | *Very Poor* | *Don't Know* |
|---|---|---|---|---|---|---|
| Ease of travel/Convenience | | | | | | |
| Reputation of the fishing product | | | | | | |
| Rest and relaxation | | | | | | |
| Overall quality of angling | | | | | | |
| Fish Stocks | | | | | | |
| Quality of Catch | | | | | | |
| Availability of Bait / Tackle shops | | | | | | |
| Boat Hire / Ghillies | | | | | | |
| Club waters | | | | | | |
| Water Quality | | | | | | |
| Bio Security (Protection of fishery from alien species) | | | | | | |
| Range of fisheries in this region | | | | | | |
| Quality of information on angling (i.e. IFI, ghillies etc.) | | | | | | |
| Eating out / dining facilities | | | | | | |
| Entertainment and recreation options near the fishery | | | | | | |
| Quality of accommodation near the fishery | | | | | | |
| Scenery, countryside, environment | | | | | | |
| Friendliness / Local welcome | | | | | | |
| Value for money | | | | | | |
| Other | | | | | | |

**IF RATED FAIR/POOR/VERY POOR**

**Q4b.** **Why are you not satisfied with this aspect of the Irish fishing product?**

Q5a. What **positive** developments in angling have you noticed in recent years?

Q5b. And what **negative** developments in angling have you noticed in recent years?

Q6 What initiatives would you like to see implemented to improve angling in Ireland?
WRITE IN RELATION TO EACH OF THE FOLLOWING

**Product Development**

**Organisation/Human Resources**

**Environmental**

**Marketing**

**Other**

Q7 How would you like to see Ireland marketed as an angling destination?

**Q8.a** **Which of the following promotional tools do you use to market your business?**

- ☐ Advertising in angling magazines
- ☐ Advertising in non angling publications
- ☐ Social media advertising
- ☐ Website
- ☐ Articles/features
- ☐ Produce brochures
- ☐ Provision of up to date angling information
- ☐ Attend angling trade shows in Ireland
- ☐ Attend angling trade shows abroad
- ☐ Bundling of products (Accommodation plus fishing)
- ☐ None of the above
- ☐ Other (Specify)

**Q8.b** And how much do you spend on marketing annually? (€) ☐

**Q8.c** **IFI markets angling in Ireland through a number of channels. Which of these IFI marketing interventions are you aware of?**

- ☐ Advertising in angling magazines
- ☐ Advertising in non angling publications
- ☐ Social media advertising
- ☐ Website
- ☐ Articles/features
- ☐ Produce brochures
- ☐ Provision of up to date angling information
- ☐ Attend angling trade shows in Ireland
- ☐ Attend angling trade shows abroad
- ☐ Bundling of products (Accommodation plus angling)
- ☐ Supports clubs and associations
- ☐ Fisheries Awareness Week

**Name**

**Position**

**Name of establishment**

**Address**

**C1.** **Type of establishment/business**

- Accommodation
- Fishing Tackle Shop
- Ghillie/Guide
- Boat Hire
- Charter Boat Operator
- Other

**C2.** **Region**

- Eastern RBD
- South Eastern RBD
- South Western RBD
- Western RBD
- North Western RBD
- Shannon RBD

*Thank you for taking the time to participate in this survey*

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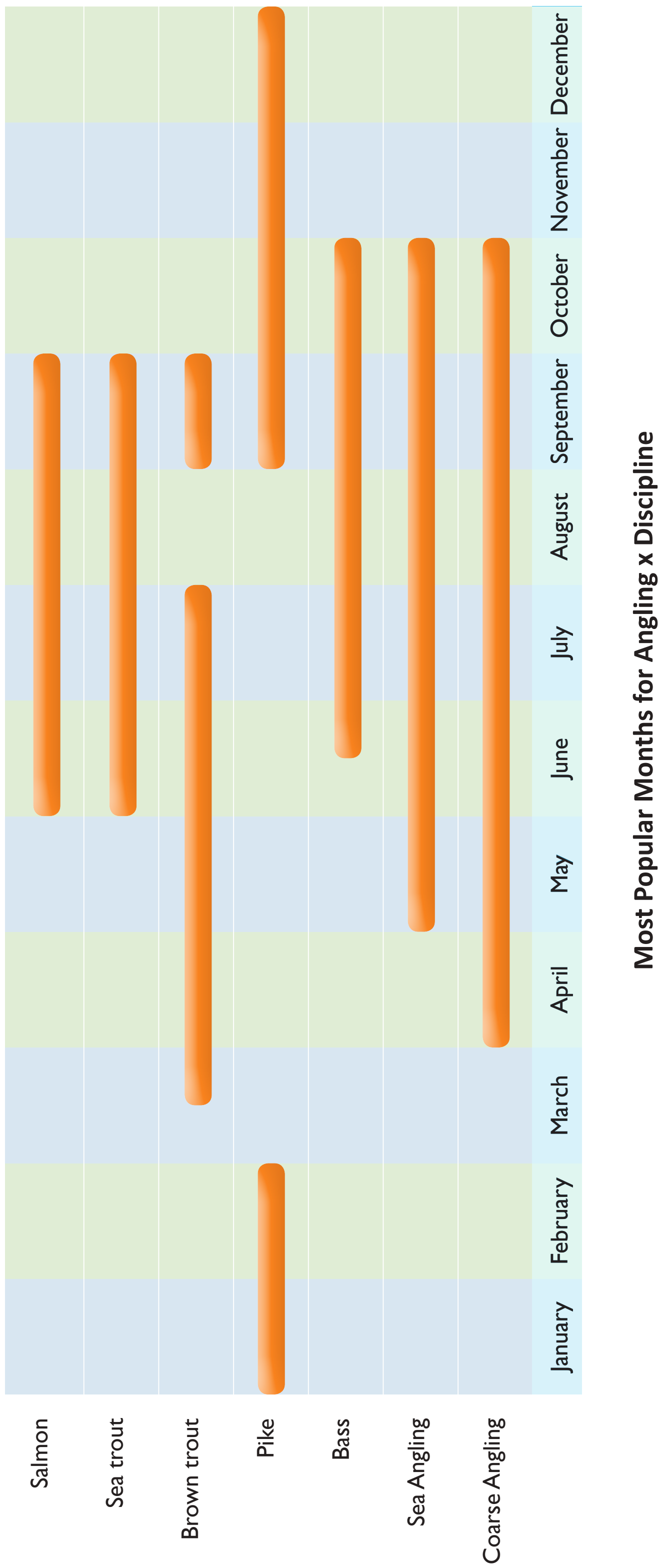
# Appendix D

## Most Popular Months for Angling x Discipline


RosGuill

# Appendix C - Most Popular Months for Angling x Discipline



Iascach Intíre Éireann
Inland Fisheries Ireland