Devon and Severn IFCA Sea Angling 2012 Summary Notes

Sea Angling 2012 was a nationwide study into the economic and social impacts of recreational sea angling involving Cefas, the MMO and the ten IFCAs. A project addressing Recreational Sea Angling (RSA) in England was deemed to be required "in order to help local and national policy makers make balanced, well informed decisions on the sustainable development of all forms of sea fishing". Additionally the surveys met UK obligations under European law to estimate recreational catches of several species, including bass and cod. Sea Angling 2012 therefore had several specific aims:

- To find out how many people go sea angling in England
- To estimate how much anglers catch
- To estimate how much anglers release
- To estimate the overall economic and social value of sea angling

Data was collected from over 11,000 sea anglers via a series of surveys. These included:

- An office of National Statistics telephone survey
- IFCA face to face interviews (shore & private boat)
- Catch diaries (Charter boats) led by the MMO
- Two online surveys, one regarding social and economic impacts of sea angling and a second which was essentially an online catch diary

Anglers were generally very willing to engage with the process and nationally only 6% of anglers approached declined to be interviewed. The Charter Boat sector was an exception to this, which is addressed later in the Charter Boats section. Nationally IFCAs conducted 2030 interviews with shore anglers and 410 interviews with private boat anglers. Devon and Severn IFCA conducted a total of 143 interviews with anglers in Devon and 126 interviews with anglers in the Severn during dedicated angling surveys. In addition Principal Environment Officer Sarah Clark was an active member of the project steering group.

D&S IFCA continued to run shore-based surveys in the Severn part of the district in 2013, conducting a further 40 interviews to date, with the survey planned to continue until February 2014. This was in response to local concerns that 2012 was a poor and unrepresentative year for angling in the Severn. Devon and Severn IFCA will use the results of Sea Angling 2012, as well as extra data collected to develop a specific angling strategy for the IFCA. Additionally, based on the report's findings D&S IFCA will seek to develop opportunities for recreational sea angling in our district as outlined in the Devon and Severn IFCA Annual Plan (2013-2014).

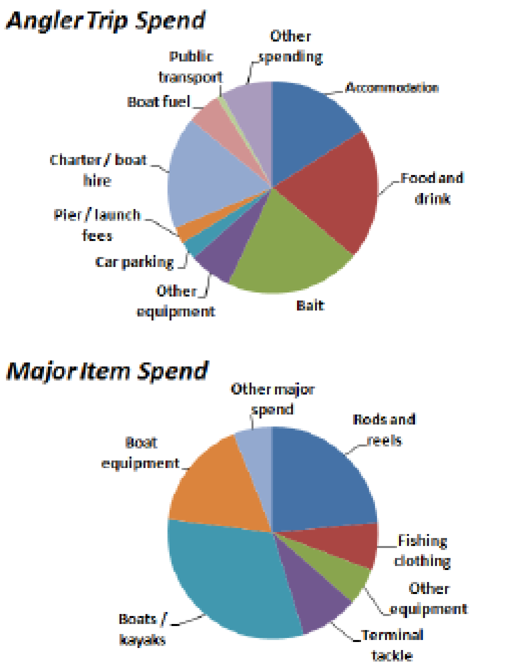
The following notes are taken from the Sea Angling 2012 Final Report and supporting Technical Reports, published by Defra on the 27th November 2013. The technical reports address the various sampling strategies and extrapolation techniques and various caveats surrounding the analyses.

The original documents can be found at:
http://www.marinemanagement.org.uk/seaangling/finalreport.htm

Senior Environment Officer Libby Ross 02 December 2013

Key findings – Economic

- There are an estimated 884,000 sea anglers in England with 2% of all adults going sea angling
- **5.6% of the population in the South West are anglers**
- Sea anglers spent £1.23 billion in 2012
    - This equates to £831 million of direct spend (imports and taxes excluded)
    - Sea angling in England directly supports 10,400 full-time jobs
    - £360 million of gross value added
    - Including indirect and induced effects into account, sea angling supported £2.1 billion of total spending, 23,600 jobs and £980 million GVA
- The average annual spend per angler was estimated at £1394 per year (£761 trip-related costs and £633 on major items).



Box 8: What do sea anglers spend their money on?

Table 2.6 Economic impacts of Sea Angling

	Spending / output £m		Employment FTE		GVA £m	
	Initial	Final	Initial	Final	Initial	Final
Agriculture, fishing, food and clothing	127.6	235.6	1,698	2,635	54.6	91.4
Machinery, electronics, transport equipment	179.6	227.7	1,187	1,505	53.9	68.6
Other manufacturing, energy, construction	24.9	233.9	184	1,462	12.5	84.6
Wholesale and retail	199.1	379.8	2,723	5,194	100.1	197.3
Hotels and restaurants	153.7	197.2	2,800	3,591	67.7	89.2
Transport and transport services	94.1	223.4	1,161	2,758	38.8	92.3
Finance, business, public and other services	52.4	599.7	639	6.474	29.9	354.9
Total	**831.4**	**2,097.3**	**10,392**	**23,619**	**357.5**	**978.4**

Note: Totals may not sum due to rounding.

Key findings – Social

- 70% sea anglers say that sea angling is important to their quality of life
- 69% of sea anglers say that it is their main way of experiencing nature
- 55% of people go sea angling to ‘relax and get away from things’
- 47% go sea angling to ‘be outdoors and active’
- Sea angling provides relaxation, physical exercise, and enables socialising.
- Six areas of wider societal benefit from sea angling were identified:
  - Sport & physical activity
  - Health and well being
  - Environmental access and improvement
  - Urban community benefit
  - Rural community benefit
  - Young people
- Anglers believe that the most important thing to increase participation in angling would be to improve fish stocks.
- Females account for between 2 and 16% of the English sea angling population depending on the survey methodology (see various Technical Reports)
- The majority of anglers are aged between 46-55, with the second most numerous age band being the 36-45 category. The overall average age of anglers in England is 51
- Most respondents are ‘rare’ or ‘occasional’ sea anglers (defined as having fished no more than 3 days in last 3 months)
- Only 4.7% of participants in sea angling were members of a local sea angling club and only 2.7% were members of a national club

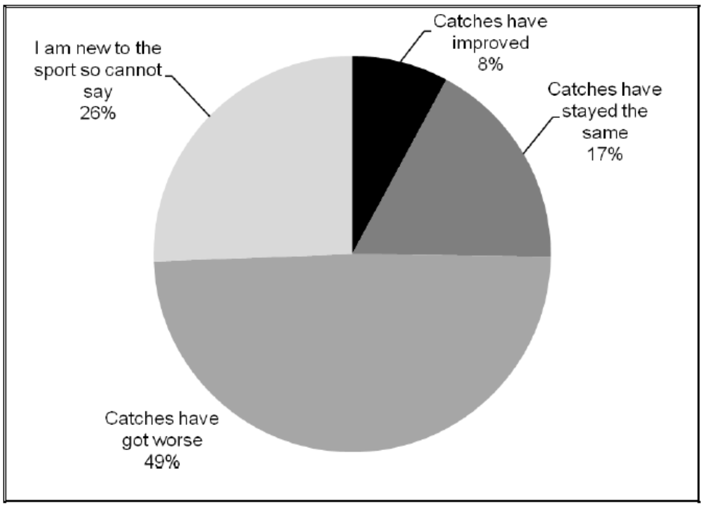


Figure 9: Responses from GB participants to the question “Thinking about the level of recreational sea angling catches you have seen when fishing recently, compared to earlier years would you say that...” (n=254)

Key findings – Fisheries

- 4 million days of sea angling were recorded in 2012.
- Shore fishing was the most commonly recorded activity followed by private boat angling, then charter boats
- Shore anglers in England caught between 4.4 – 6.4 million fish in 2012
- Private boat anglers in England caught 2.6 - 4.8 million fish in 2012
- Shore anglers release 75% of all fish caught, boat anglers release around 50%.
- The most common reason for release of fish was that they were under MLS
- Shore anglers release 80% of all bass and 60% of call cod caught. Release rates are lower for private boats (60% bass, 20% cod) and charter boats (40% bass, 20% cod) mainly due to the larger sizes of fish caught. (see tables below)
- Cod and bass were the most commonly targeted species
- The most commonly caught species were:
    - Mackerel (27%)
    - Whiting (19%)
    - Bass (10%)
    - Dogfish (6%)
    - Cod (5%)
    - Dab (5%)
    - Pollack (4%)
    - Plaice (3%)
    - Smooth hound, flounder, bib, wrasse, sea breams, skates & rays
- Annual catch of bass from shore+ private+ charter boat = 380-690t of which 230-440t kept (see tables below)
- Annual catch of cod from shore+ private+ charter boat = 480-870t of which 430-820t kept (see tables below)
- Combining the Sea Angling 2012 estimates of annual bass harvests (kept fish) with similar estimates made in 2011-12 by France and Belgium indicates a combined recreational harvest of approximately 1,300 – 1,500t.
- In comparison, the reported international commercial fishery landings for bass from the North Sea, Channel, Celtic Sea and Irish Sea in 2012 were 4,060t. Bearing in mind the absence of recreational catch estimates for Wales and some other European countries, the combined recreational fishery harvest could be at least a quarter of the total fishery removals.

Table 6. Release rates (by number) for bass, cod and all species combined.

	Shore	Private / rental boat
Bass	82%	57%
Cod	56%	27%
All spp	76%	51%

Total annual catch estimates for cod and bass

Annual catch weight (tonnes)		**Shore**	**Private and rental boats**	**Charter boats**	**Total**
Bass	Total	98 to **143**	**194** to 546	44	**380** to 690
	Kept	38 to **56**	**142** to 367	31	**230** to 440
Cod	Total	95 to **138**	**172** to 595	175	**480** to 870
	Kept	75 to **109**	**158** to 582	159	**430** to 820

Figures in normal or bold type for shore or private boats are from the same estimation method.

Country	Recreational fishery: annual kept catch	Commercial fishery landings 2012
England	230 t – 440 t	897 t (UK total)
France	940 t	2,492 t
Netherlands	128 t	372 t
TOTAL	1,300 – 1,510 t	4,060 t (all countries)

Box 18: Sea angling catches of bass compared with commercial landings in 2012.

Charter boat involvement

- Around 48% of all charter boat catch is released. Tope, smooth hounds, dogfish and conger eels were almost always released. Release rates are thought to be lower than shore angling because fish caught tend to be bigger and also fish may be caught from greater depths, and are therefore more likely to be dead or injured when landed.
- The Charter Boat survey was not as well received as the shore-based study. Possible reasons for this, taken directly from the report are given below. Additionally D&S IFCA spoke to Charter boat operators involved in the scheme who found the catch diaries difficult to use.

> A large proportion of vessel owners declined to take part in the study for reasons including fears about the purpose and likely impact of the survey. Exclusion of these vessels is a source of bias, as they may on average have different catch rates to those that did participate. Also, there are likely to be other charter boats not identified in the initial screening exercise. No diaries were returned for the Irish Sea, so no estimates were possible in this region, and no estimates of catches of large pelagic sharks could be made.

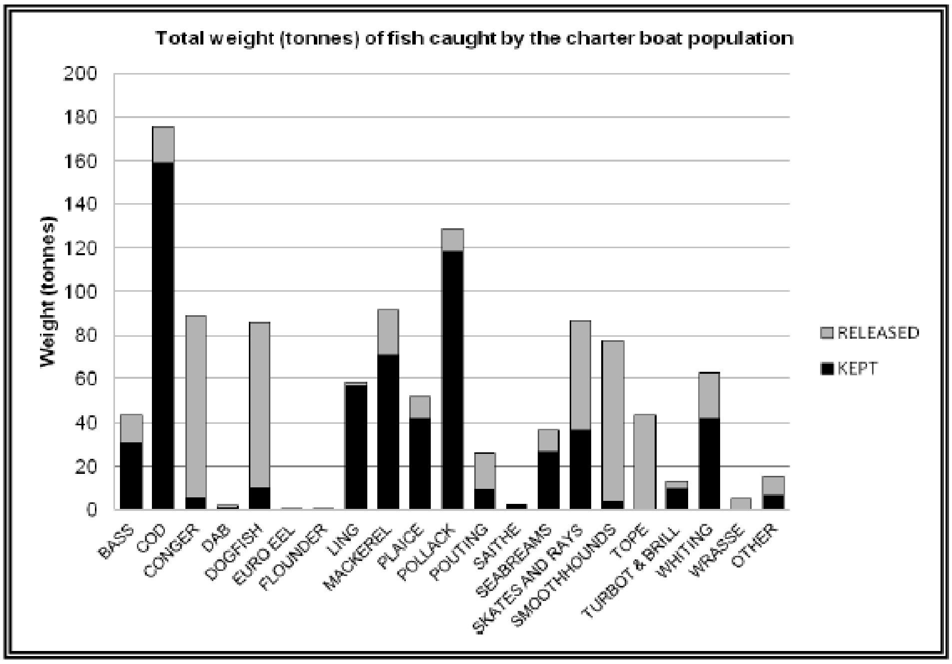


Figure 8: Total weight caught by the charter boat population by species (excluding shark vessels and those boats operating from the Irish Sea)