

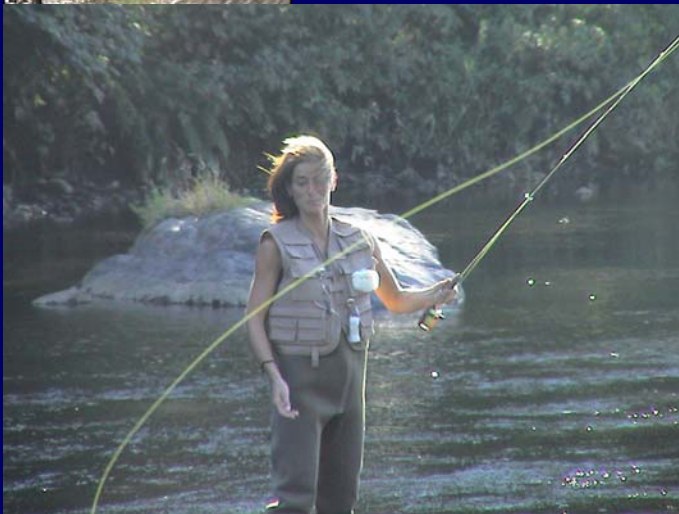


Fisketurism i ett Europeiskt perspektiv

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www.eftta.com



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'Sportfisket och kommunen'

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1. European tourism

2. European angling tourism

3. EU institutions and Tourism

4. Need for more and better data

on angling, angling tourism, socio-economics etc.

- **EAA's recreational angling/sportfishing definition**
- **EFTTA and EAA RECFISH project**
- **EAA website –plan for future: 'one-stop angling site'**

1. European tourism

'Tourism will soon be Europe's largest service industry. Europe is already the world's favourite destination, with the sector generating **up to 12% of GDP, 6% of employment, and 30% of external trade.**

Tourism demand is forecast to **grow by almost 50% by 2010**, adding some 2-3 million more jobs to the **nine million** it currently supports.'

'...the way people are going on holiday is changing. The growing trend is for people to take **more and shorter** trips and to travel further from home.'

EEA, European Environment Agency

http://themes.eea.europa.eu/Sectors_and_activities/tourism/indicators

2. European Angling Tourism

- **Numbers of European Anglers (*) :**
 - >25 million**
 - 8-10 million sea anglers**
 - Socio-economic value >25 billion euro**
- **Trend: Lack of data; dive in some countries but now supposed to be on the increase in most of Europe**
 - *Huge potential for more anglers; to be balanced against fish resources*
 - *If well managed angling and angling tourism fits all criteria for being a genuine sustainable 'industry'*
- **Numbers of tourist anglers: Very little data**

* *Figures from EAA, European Anglers Alliance based on partial data from various national studies. A comprehensive socio-economic study for Europe as a whole is required. Numbers of anglers per country:*

www.eaa-europe.org/web/Pages/About/AboutEAA_EN.htm#NumberAnglers

3. The EU institutions and Tourism

- Tourism is an integrated part of the Competitiveness Council's work and dealt with by the European Commission's DG Enterprise and the European Parliament's Committee on Transport and Tourism
- Tourism is included in the new EU Treaty, but the Treaty is not adopted yet by all Member States (important concerning budget and funding of tourism projects)
- COUNCIL RESOLUTION of 21 May 2002 on the future of European tourism (2002/C 135/01)
- A Tourism Green Paper to be released this or next month
- EU Funding: Various dependant on scope LIFE+, EFF, FP7 and more
- EU tourism papers: http://ec.europa.eu/enterprise/library/lib-tourism/off_doc.htm
- EFTTA and EAA is involved in planning a 'Marine and Coastal Tourism Conference'. To be hold in Barcelona 18 or 20 April. This is a part of the EU's Maritime Policy Green Paper consultation process.

4. Need for more and better data

'Goda förutsättningar för fisketurismens utveckling'

– Det är en bransch med goda framtidsutsikter. Sverige har orörd natur och attraktiva fiskarter, många svenskar har stort intresse för fritidsfiske och dessutom försöker man locka utländska fisketurister, säger Inger Dahlgren på Fiskeriverkets avdelning för resursförvaltning.

– **Idag saknas kunskap om samhällsekonomiska effekter av fisketurismnäringen.** Det vi vet är att den regionalt kan ha stor betydelse för sysselsättning och ekonomi, säger Inger Dahlgren.

2005-03-22

<http://aktuellt.fiskeriverket.se/sottochsalt/article.asp?ArticleId=59>

Study 'ECONOMIC VALUE OF RECREATIONAL FISHERIES IN THE NORDIC COUNTRIES'

© Nordic Council of Ministers, Copenhagen 2000

www.norden.org/fisk/publikationer/econval.pdf

Example on various angling segments. Also an example showing that common angling definitions would make easier comparison between studies.

Page 7:

...tillfälliga fiskare, occasional angler, är den största kategorin av fritidsfiskare inom Norden (om man undantar Sverige, där denna benämning inte använts). I Sverige utgörs den största gruppen av sportfiskare, dvs. de som bara fiskar med handredskap (81 %). Den utvalda åldersgruppen (18-69) genererar sammantaget 77 miljoner fiskedagar årligen i Norden. I genomsnitt blir detta 14 fiskedagar per fritidsfiskare. Kustfiske sätts i första rummet av fiskare i Norge, Danmark och Sverige. Islänningar prefererar fiske i åar och älvar, medan finska fritidsfiskare helst fiskar i sjöar.

Some Swedish reports (not exclusive):

- Sportfiskets betydelse och samhällsnytta -Ingemar Norling. Sekt. för vårdforskning Sahlgrenska universitetssjukhuset, Göteborg Jan. 2003

www.sportfiskarna.se/artiklar/Sportfiskets_betydelse.pdf

- Förutsättningar för fisketurismens utveckling i Sverige Rapport från ett regeringsuppdrag, februari 2005, Naturvårdsverket och Fiskeriverket

www.fiskeriverket.se/download/18.1cb5b8de10fc4b40c7480001622/fisketurism+utv.pdf

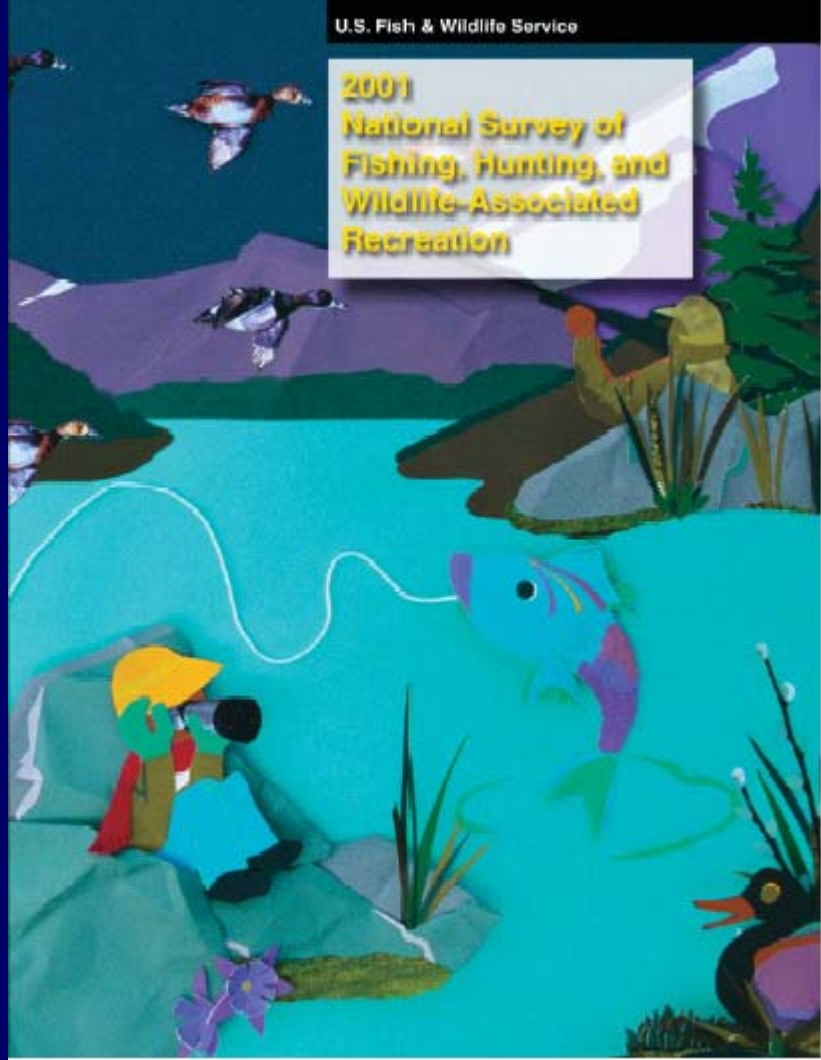
- Fiske 2005 En undersökning om svenskars fritidsfiske September 2005

www.fiskeriverket.se/service/publikationer/fiskeriverketinformerar/finfo2005/finfo200510.4.1490463310f1930632e80007741.html

- **For other countries see selection on the EAA site** www.eaa-europe.org *(more studies will be uploaded soon)*

- **“Sport Fisheries” (or Marine Recreational Fisheries) in the EU’, CEFAS and CEMARE** *(A pan-European study. First of its kind. Desk study. No new data but good overview. 213 pages)*

- EU is far behind from US, Canada Australia and New Zealand. In EU only Sweden do angling studies every fifth year making trend analyses possible.
- US has done the same every fifth year since 1957.



<http://www.census.gov/prod/2002pubs/FHW01.pdf>

Price: 10 mill dollars. The fishing part alone? Not known. However, we could do a pan-European recreational angling/sport fishing study for 1-2 million euro dependant on how detailed and which quality level.

Data & Statistics

The American Sportfishing Association provides data and statistical information for its members and the general public about both the sportfishing industry and angling. The links below provide direct access to ASA's research and useful third-party Web resources. Click on a topic below.

Participation

This section provides information about how many people fish, the types of fish and fishing methods employed, where people fish and more.

Consumer Demographics

This section provides information about anglers including age, income, education and more.

Sales and Economic Trends

This section provides information regarding how much anglers spend on fishing activities, the economic impact of sportfishing, tax revenue generated and other benefits created by sportfishing dollars.

General Market Data

This section provides information about market trends. Additional links are provided to information sources regarding regional and national economic trends.

ASA Research & Information

The American Sportfishing Association regularly releases information regarding angling trends and impacts, economic data and more.

www.AnglerSurvey.com

Individual anglers are invited to participate in a monthly survey regarding their fishing experiences and expenditures which will be used to improve the angling experience.

Sportfishing companies interested in AnglerSurvey.com results should contact [Southwick Associates](#) to learn more.

Additional Resources

This section provides ASA-produced reports and documents as well as a partial list of third-party Web sites relating to sportfishing. Inclusion in this list does not indicate an endorsement by ASA but is provided for information only. Recommendations for additions may be sent to communications@asafishing.org. ASA reserves the right to accept or reject these recommendations.

EAA's Definition Recreational Angling

(used by the authors in their recent published pan-European sport fishing study)

- Rod and line (or pole)
- Non-commercial
 - Anglers do not sell their catch, but
 - return or eat it (within the family unit)
- Recreational angling is part of the broader defined activity 'Recreational Fisheries'
 - but far the biggest in value and practitioners

'Recreational Fisheries'

**Recreational Angling
and sportfishing**

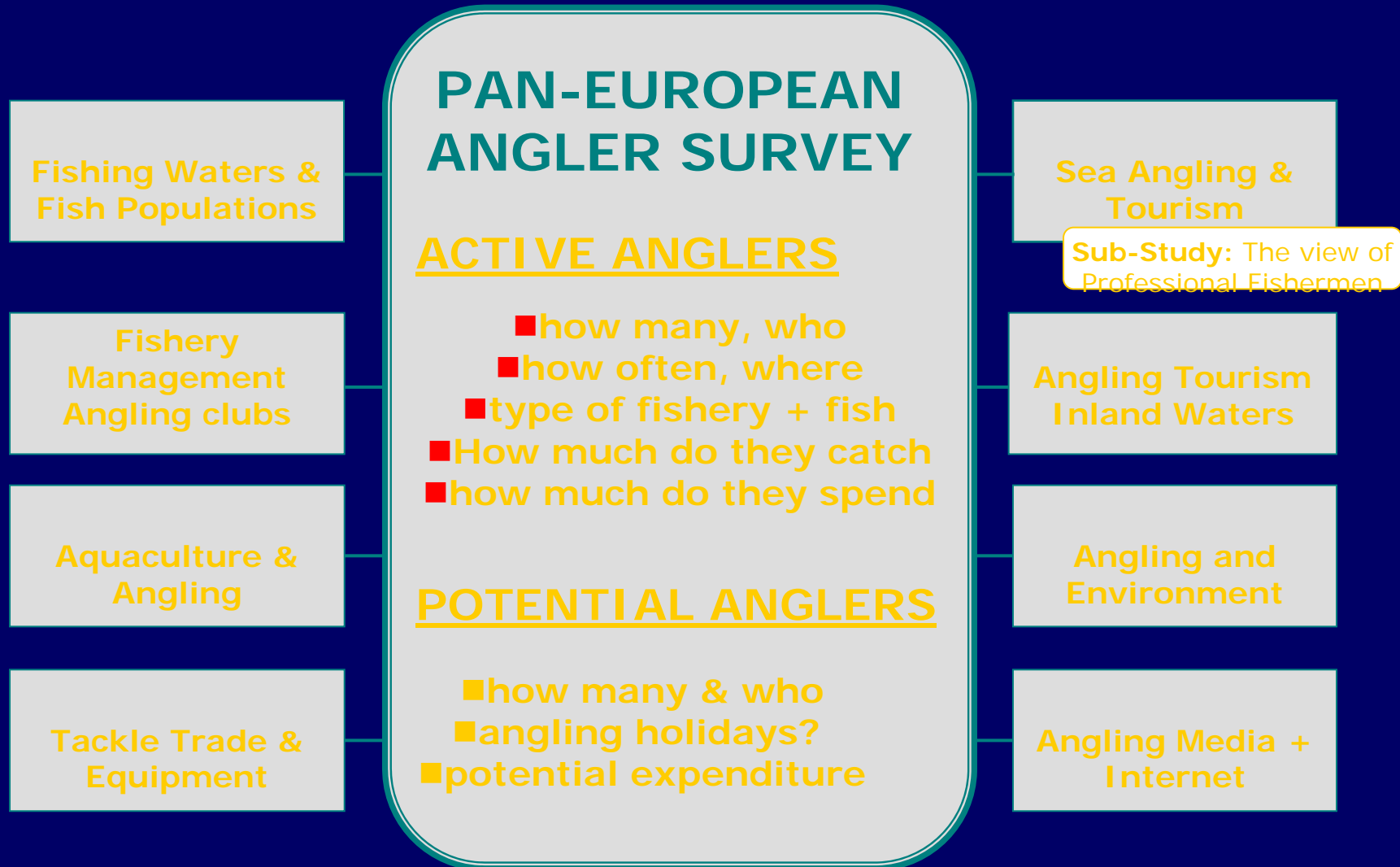
**Other Recreational
Fisheries**
(i.e. nets and long lines)

Commercial Fisheries

Full version of angling EAA's recreational angling/sport fishing definition:

http://www.eaa-europe.org/web/Files/AnglingDef/DEFINITION-EAA_Angling_Def_long_FINAL_EN.doc

RECFISH – General Research Design



RECFISH – General Research Design

PAN-EUROPEAN ANGLER SURVEY

ACTIVE ANGLERS

- **how many**
- **who** (sociodemographic profile)
- **how often** (angling days)
- **where** (home regions, holiday countries)

- **which type of fishery + species of fish**

	sea	coasts	rivers	lakes	ponds
"game"					
"coarse"					

- **how much do they spend**

equipment & tackle	fees & licenses	travel & accomodation	boats & rental	other items

- **indicators for growth potential**
 - general willingness to pay more
 - presently unexploited interest in angling holidays
 - interest in upgraded services (courses, guides)

POTENTIAL ANGLERS

past anglers + interested starters

- **how many & who** (sociodemography)
- **interest in angling holidays**
(countries / regions, sea – rivers – lakes)
- **potential expenditure levels**

Satellite Study A
Fishing Waters & Fish Populations
Typology, Trends

Satellite Study B
Fishery Management
Owners, Managers,
Angling Clubs

Satellite Study C
Aquaculture & Angling
Importance & chances of
production for fish stocking

Satellite Study D
Tackle Trade & Equipment Providers
producers–wholesale–retailers

Satellite Study E
Sea Angling & Tourism
Status, Case Studies, Chances –
Stakeholders

Sub-Study: The view of
Professional Fishermen

Satellite Study F
Angling Tourism in Inland Waters
Status, Stakeholders, Trends

Satellite Study G
Angling and Environment
The view of hydrobiologists,
governmental bodies & NGOs

Satellite Study H
Angling Media + Internet
present scope, importance as partner
for future growth

The European Tackle Industry

For this sector alone:

- 2900 companies, (manufacturers, and wholesalers) trading in recreational fishing tackle
- representing 60.000 jobs
- making an annual turnover of 5 billion euros.
- the fishing tackle trade serves 25 million recreational and sport fishermen through 12900 tackle shops that employ another 39.000 people.

Socio-economic value:

USA:

- Estimated number of U.S. recreational anglers—44 million.
- More people fish than play golf or tennis combined.
- Economic impact of recreational fishing—\$116 billion.

<http://www.asafishing.org/content/statistics/>

- Scotland: Wildlife tourism has grown by 37% since 1997 according to the recent ***Review of Wildlife Tourism*** by the Tourism and Environment Forum (TEF). Marine wildlife tourism in particular has shown a dramatic leap with the number of boat operators growing by 79% in the last five years. The Review shows a range of statistics on wildlife tourism in Scotland as well as putting forward the views of operators.
[Report available from Caroline Warburton, TEF:](#)
- [or the publication page.](#) www.greentourism.org.uk
- Another report on Marine Wildlife Tourism is also available.

Thank you for your attention.
Maybe we'll meet again at



Prague - Czech Republic