

Case Study: *Recognising the economic contribution of angling to the rural and coastal economies of Europe, and identifying how ICT can substantially enhance that contribution.*

Crick Carleton, Chief Executive, Nautilus Consultants (Natural Resource Economists), Edinburgh, Scotland - +44 131 555 0660; crick@nautilus-consultants.co.uk; www.nautilus-consultants.co.uk.

The European recreational fishing sector, on the very crudest of estimates, is a sport and leisure activity involving some 25 million people, with an economic worth of some Euro 25 billion per year. Despite the scale of this sector, its strong sustainability credentials, its largely rural location, and its considerable scope for further development, it remains largely in the shadows when it comes to rural policy formation and development initiatives. Only by providing and disseminating detailed and verifiable evidence of its importance will this situation change.

In this context, an RTD research proposal is being prepared under the auspices of the European Anglers' Association (www.eaa-europe.org) to undertake such a pan-European valuation of the angling industry.

Introduction

In a focused effort to direct policy in the management and development of its aquatic resources and the economic activities that they support, in 1999 the National Assembly for Wales commissioned consultants to undertake a review of sea and inland fishing in Wales. This brief to the consultants represented a major departure from tradition, combining as it did examination of both freshwater and marine, but also both recreational and commercial fisheries. The findings of this work were reported in late 2000, and a copy of the full report can be downloaded from the company website of Nautilus Consultants - www.nautilus-consultants.co.uk.

The upshot of this study was to identify that recreational fishing was of far greater economic importance than had hitherto been thought, and that indeed a crude assessment of the value of sea angling showed that it was generally more important than commercial fishing. In identifying development opportunities and policy options, the consultants concluded that there remained much more economic benefit to be derived from this sector of the rural economy. Unlocking this benefit first required recognition by planning and economic development decision-makers of the scale and value of this sector. Secondly it required the more intense, strategic and integrated use of ICT in linking consumer with product, and thirdly the treatment of this sector required specific development attention - in enhancing fishing opportunities, but more importantly in matching support services, such as access and accommodation, with consumer needs. Where this has been achieved, as for example in Ireland and in parts of the US, the rewards to rural development can and have been considerable.

The different facets of recreational fishing

An aspect of rural development, and indeed rural economic diversification, that goes largely unrecognised in the greater scheme of economic development is that of recreational fishing. Across Europe there is hardly an area of river, lake, estuary or coastal water that is not visited on a regular basis by men and women, boys and girls, intent on spending a day by the water trying to entice that fish on to their hook.

Whether fly fishing for salmon, float fishing for carp, or spinning for sea bass, these activities provide great enjoyment and excitement for a large number of people, encourage people to reflect on the beauties of nature, and provide a

setting in which they can interact with the environment around them in a sustainable manner. In pursuing their sport and recreational activities, anglers are also active conservationists. Not only is the practice of catch and release increasingly widely applied, but anglers also visit waterways that go otherwise unobserved, and record not just the state of fish and fish stocks, but also the general state of the environment and its constituent ecosystems. These are all aspects that we should encourage.

But there are other realities. Waterways and coastlines need managing, anglers need places to launch their boats from, access routes to river banks, places to stay, places to eat, and places to park their cars. Anglers need to be able to participate in their sport and leisure activity in an orderly manner alongside other water-users. Such service-provision requires funds and management resources, but for the most part it is difficult to lever such funds from local authorities against competing requests from farmers, heritage tourism, and out-of-town retail and business parks, and from the public demands for improved rural infrastructure. It is true that some anglers pay very heavily for access to their sport - for example salmon and trout fishermen - but for most the linkage between service provider and service beneficiary is ill defined, and the economic linkages go unrecognised. As a consequence the angling sector commonly loses out to perceptions that it is of minor importance.

Valuation of the economic contribution of recreational fishing

In the Wales example, an assessment of the scale and economic contribution of angling to the Welsh economy was undertaken based on such information as was readily accessible at the time of the study. This provided, and still provides, a good starting point for policy formation and economic planning. Whilst the figures are not fully accepted by all parties (they are generally thought to under-estimate activity) they have been widely welcomed as the first comprehensive attempt to provide a systematic quantification of the scale and value of the industry. The headline amounts are as follows:

	game	coarse	sea	total
estimated no. rod days per year	95,618	400,000	350,000	850,000
employment	171	90	471	
Direct and indirect expenditure	£8.2 M	£39.4 M	£28.7 M	£76.3 M

anglers that visited Wales specifically to fish

* visitors to Wales that undertook some fishing during their stay

A variety of methods were used to estimate and calculate these figures, drawing on data-sets developed by licensing and monitoring agencies, the Wales Tourist Board, fishing clubs, and a range of geographically specific studies. Their accuracy is determined by the quality of information available, which in turn has to some extent determined the calculation method employed. In discussion with the range of parties involved, it was generally agreed that these figures represent conservative estimates of economic value, but that only a more in-depth survey of activity would be able to inform just how much greater actual economic contribution might be.

The bases for each of these valuations are detailed in the full study report.

Identified strengths and weaknesses, opportunities and threats

On the basis of literature research, discussions with sector representatives, shop owners and the like, it was possible to come up with a reasonable picture of how the industry was doing, where its strengths and weaknesses lay, and what opportunities and threats the future held. These are captured here in a standard SWOT analysis.

SWOT Analysis

<p>Strengths</p> <p>The wide range of fishing opportunities and 'unspoilt' environment means recreational fishing is popular, but venues are not overcrowded and there is still room for growth in all sectors.</p> <p>Coarse fishing</p> <ul style="list-style-type: none"> ◆ Large number of venues ◆ Stocks of coarse fish healthy ◆ High participation levels by Welsh residents and visitors ◆ Attractive surrounding countryside <p>Game fishing</p> <ul style="list-style-type: none"> ◆ Relatively low price of participation (compared to Scotland, but not Ireland), ◆ Availability of licences, ◆ 'Unspoilt' nature of the countryside ◆ Varied game fishing opportunities (locations and species) <p>Sea angling</p> <ul style="list-style-type: none"> ◆ Wide range of species – excellent bass, black bream and tope fishing ◆ Much of coastline and inshore sea area protected by various natural heritage designations, few of which limit angling activity or opportunities ◆ Active consultation and co-operation between organisations representing sea anglers and fisheries and environmental managers ◆ Good road access along the north and south coasts of Wales ◆ Good competition venues – for both shore and boat angling 	<p>Weaknesses</p> <p>A lack of strategic development and support/marketing infrastructure leading to potential customers being unaware of fishing opportunities and poor associated facilities, accommodation and access.</p> <p>Coarse fishing</p> <ul style="list-style-type: none"> ◆ Lack of coarse fishing representation on committees compared to game fishing ◆ Not as varied species mix as English coarse fishing facilities ◆ Lack of good match fishing facilities ◆ Questionable value for money at some venues ◆ Illegal activity (licence avoidance and poaching of specimens from ponds) <p>Game fishing</p> <ul style="list-style-type: none"> ◆ Depleted wild fish stocks (salmon in particular) ◆ Water quality and pollution risks <p>Sea fishing</p> <p>Generally poor recognition of the economic importance of this sector resulting in limited official support to the sector and its requirements</p> <ul style="list-style-type: none"> ◆ Sector representation on a voluntary basis and fragmented, though this is improving ◆ Heavy commercial fishing pressure on various species – particularly illegal netting for bass – under-mining resource base for recreational anglers ◆ More difficult road access to the west coast of Wales – limits attraction to day and short-stay visitors ◆ Poor to non-existent signage for beach and boat angling
<p>Opportunities</p> <p>New and existing venues, accommodation, facilities and marketing initiatives can be substantially improved and there is European money available to assist this.</p> <p>Coarse fishing</p> <ul style="list-style-type: none"> ◆ Angling Centre of Excellence being built ◆ Hosting international events ◆ Increase recruitment of non-anglers through simplified participation and coaching <p>Game fishing</p> <ul style="list-style-type: none"> ◆ Targeted marketing based on sea trout, brown trout and grayling ◆ Business opportunities associated with visiting anglers <p>Sea fishing</p> <ul style="list-style-type: none"> ◆ The provision of a low cost but detailed guide to sea fishing opportunities in Wales ◆ Substantially enhanced back-office database infrastructure to existing sea fishing web-sites (notably fishing sites, accommodation, charter boat availability, facilities and opportunities for family entertainment) 	<p>Threats</p> <p>The strength of the pound and decline in long-stay holidays means fewer people are visiting Wales for long periods. This means the promotion of specialist holidays such as fishing is necessary, but it should be balanced with environmental concerns (disturbance to wildlife and health of diadromous stocks) and needs of other users.</p> <p>Coarse fishing</p> <ul style="list-style-type: none"> ◆ Opportunistic commercial fishery operators may damage reputation of others ◆ Few suitable match fishing venues ◆ Pollution and disease causing fish-kills <p>Game fishing</p> <ul style="list-style-type: none"> ◆ Pressure on water courses from development ◆ Purchase of fishing rights by outside interests <p>Sea fishing</p> <ul style="list-style-type: none"> ◆ The over-pricing of long-stay parking at harbours and beaches ◆ The limited number, quality and over-pricing of launch facilities

Harnessing ICT in further developing the sector

To harness the strengths and opportunities evident within the sector, whilst at the same time dealing with weaknesses and threats, it was considered appropriate to add further development weight and urgency to the more strategic and integrated use of Internet technology, and data-base driven information provision. This formed one of four development strands put forward by the consultants that comprised:

- ◆ Supporting businesses
- ◆ Developing tourism / marketing
- ◆ In Wales promotion
- ◆ Conservation / management

The “developing tourism / marketing” strand builds on earlier work by the Wales Tourist Board to design and launch a fishing brochure supported by a web-site “Fishing Wales” - <www.fishing.visitwales.com>. Like many regional tourism promotion sites, this provides an entry point to Internet resources concerning angling. But it fails as yet to provide a fully integrated entry point to matching fishing opportunities with accommodation, etc., in a way that would provide a one-stop shop for visitors seeking to plan a trip – whether an occasional or dedicated angler, a family or an angling group. Much of this failing is hardly the fault of the tourism authorities but rather a reflection of the fragmented nature of the angling sector, the early stages in Internet take-up by anglers and angling service providers, and the early stages in the evolution of Internet portals as a means of integrating angling services.

A number suggested means by which these sectoral weaknesses might be overcome was presented in the study findings. These include:

The “One-Stop Shop”

Visitors to Wales that wish to go fishing are faced with a bewildering array of options. In addition to deciding which venue(s) to choose, they must get the necessary licences and permits (rod licence and for individual fisheries), be aware of local byelaws, address issues of transport and access to venues as well as organise suitable accommodation.

A one-stop shop providing independent advice and booking facilities for all anglers (and their families' needs) is needed to support the sound promotional foundation of the Fishing Wales brochure and web site. The service should incorporate a telephone booking and helpline with a database including up-to-date information on all angling services. This database can be linked with the fisheries accreditation and classification schemes mentioned later in this section. The shop should have close links with the web site, allowing online enquiries to be answered swiftly.

Fishing in Wales web site - <www.fishing-in-wales.com>

There were around 300,000 visits to the fishing-in-wales web site in 1999 with an average of 15 minutes spent on the site. The extensive site is well maintained and improvements have been made based on customer feedback. The information on visits to the web site is evidence of a useful, engaging web site that will have a positive impact on both the number of anglers choosing Wales and their experience during the visit. Angling clubs are also reporting direct benefits from the web site in terms of increased membership from outside Wales.

Planned developments for the site during 2000 outlined for Phase II include:

- ◆ Integrate the accommodation, travel and fishing information more closely, so that the site acts as an online “one-stop shop” for fishing tourism information.
- ◆ Link more closely with holiday package providers and facilitate world-class standards of information and customer care.
- ◆ Further strengthen the environmental education material on the site, and in particular make it more interactive.
- ◆ Support Objective 1 initiatives that link improving and protecting aquatic and riparian environmental quality to sustainable job creation, particularly via eco-tourism development and promotion.
- ◆ Broaden the base of the site to include other eco-tourism opportunities.

Additional areas of work might include greater integration of the site with the wider “Angling / Fishing Wales” marketing initiative. In this regard, it is suggested that efforts should be made to link the fishing-in-wales site to other sites dealing with angling in Wales, and make efforts to engage these sites more fully in the overall promotion of

angling in Wales. It should also seek to incorporate more commercially oriented sites within the overall thrust of the Fishing Wales initiative.

The provision of world-class standards of information and customer care on the web site should be supported by initiatives to provide similar high standards to enquiries by telephone, post or in person (the one-stop shop). Improvements should in turn be supported by high standards of information and customer care to tourists once in Wales.

Accreditation scheme

An accreditation scheme for fisheries based on the range of target species available, ease of access for able bodied and disabled anglers, and the quality of associated facilities would be both a promotional tool for Welsh angling and provide a yardstick against which individual fisheries can be measured. The scheme can be developed using the Environment Agency's fisheries classification of watercourses as a starting point, potentially expanding the information into a full geographical information system (GIS) of Welsh fisheries.

A similar accreditation scheme for local accommodation would enable anglers to choose accommodation that is most suited to their needs. It would also enable those hotels and B&B's that wish to focus more on provision of facilities for anglers to promote their "angler-friendliness".

Information

The provision of high-quality specialist information for angling of all types in Wales is essential if the quality and range of angling opportunities in Wales are to be promoted to the full. The range of media used should be as wide as possible, incorporating the use of brochures, website, CD-ROM, videos, etc. The development of multilingual information sources should also be encouraged.

Development of fishing package holidays

Specialist holidays that cater for anglers and their families can be developed. Provision of travel, accommodation, licences, gear, etc. can be incorporated into the package as well as additional attractions for non-angling members of the family such as tickets to local theme parks, museums, shows, etc. and information about other attractions such as wildlife tours, restaurants, shopping facilities. Packages could be tailored for different levels of proficiency with those for beginners incorporating lessons and coaching while those for more experienced anglers could include time with a professional angler to give more expert tips. The Wales Tourist Board should be fully involved in the development of such specialist activity.

Competitions

There are a number of regional and national angling competitions currently held in Wales and Welsh anglers have done well in international competitions. Competitions should be widely promoted to encourage visiting competitors as well as Welsh anglers and to raise the profile of angling in Wales.

Concluding remarks

Recreational angling is a large and under-recognised economic activity that is growing, takes place largely in rural areas, is complementary to initiatives in sustainable tourism, rural development, and improved environmental management, and provides many opportunities for the development and enhancement of rural businesses in servicing the needs of this sector. Linking user and service provider is an essential component in further developing this sector, and in remaining competitive with angling opportunities not just in other parts of Europe, but worldwide. The more sophisticated and integrated use of database and Internet technologies forms an essential component capturing the full extent of potential economic benefits, and in securing comparative advantage.

But a first step in realising some of the additional economic advantages that this sector can bring to rural economies across Europe is to clearly establish its current worth and location. For this reason, an RTD project proposal, RECfish, is in preparation. Parties interested in participating in and/or co-funding this initiative should make their interest known to the author, or to Jan Kappel, General Secretary of the European Anglers' Alliance (eaa.aepl@skynet.be).

Til: aaa.aepl@skynet.be

Sendt: 14. januar 2003 11:03

Emne: Conference on information Society for rural areas

Dear Mr Kappel,

I hereby forward to you a very interesting initiative in the field of ICT and rural development and innovation. Recent years, developments have shown increasing understanding for the importance about how ICT can contribute to rural communities development and business innovation.

Please, find enclosed a draft program and in addition an invitation to contribute for the Conference to be held on 3-4 February 2003. We would like to facilitate key note presentations of the RECFISH expression of interest in this Conference, in particular your focus on demonstrating that that RF is a huge sustainable industry with an impressive growth potential; that RF counts 25 million recreational fishermen; provides economic activity to an estimated 25 billion euros; provides hundreds of thousands of jobs in mostly rural areas. If you want to attend the Conference I have attached a Registration form for your convenience. Please, forward this email to the members of your consortium and those who could be interested in this conference.

The conference will be a very good environment to do networking with other entities interested in this areas of the 6th Framework programme.

The aim of the conference is two folds:

- On the one hand, the conference will bring together the Information Society community and the Rural Development community. The difference sessions will illustrate current developments, will allow to share the different approaches to this problem and will discuss future possibilities in the use of IS for rural development.

- On the other hand, in parallel to the conference, there will be separate working meetings where were concrete issues and actions will be discussed among participants with common interests. In particular, we want to take advantage of the conference to bring together responsible persons from the European Commission involved in rural development in the EC and from member states, in order to agree on ways of co-operation and co-ordination of the individual initiatives in this area.

The targeted audience of the conference are persons responsible of information society and rural development in public administrations (EU, member states, regional governments), as well as key industrial, economic, and technology players in this area.

How to contribute for the Conference

You can contribute to the Conference sending a communication or a request to make a presentation about your activities in the Conference.

The communications will be publish at the web site of the Conference and could be useful for research and take up activities.

The proposals to make a presentation at the Conference will be selected according to the innovation of the work done.

Please fill in the registration form and send it before 28 January 2003 to the fax: +32 2 2309019. Accepted contributions will be confirmed by email or by fax within five days.

See: http://europa.eu.int/information_society/topics/ebusiness/ecommerce/erural/index_en.htm

How to attend the Conference

The conference offers many structured opportunities for participants to network with others sharing their interests and knowledge. Participants will be: ember States that will receive an invitation from organisers. eader groups. IT companies, Any Rural stakeholder. Attendance to the Conference is free and open

through the web site of the Conference: See:

http://europa.eu.int/information_society/topics/ebusiness/ecommerce/erural/index_en.htm

Please, do not hesitate to contact me if you have any question.

Best regards,

Isidro Laso.

Scientific Officer - Electronic Commerce Unit

D.G. Information Society

European Commission

tf: +32 2 2960557

fax: +32 2 2968365

email: isidro.laso@cec.eu.int

secretary: Ms JAMET Beatrice, tf: 32 2 2996959 email: beatrice.jamet@cec.eu.int