

Data from Actual Surveys



EUROPEAN ANGLERS ALLIANCE

The European Anglers' Alliance is a pan-European organisation, which represents the national angling organisations of 18 European countries and over 6 million affiliated anglers.

OUR MISSION

**To safeguard the fish stocks and fisheries of Europe
and to protect the interests of all those who fish
with rod and line for recreational purposes**

The EAA has a permanent office in Brussels, its statutes are registered in Strasbourg and it is officially recognised as a non-governmental organisation by the European Commission.

Member nations per September 2002: Austria, Belgium, Czech Republic, Denmark, Finland, France, Germany, Hungary, Ireland, Italy, Macedonia, The Netherlands, Norway, Poland, Slovenia, Sweden, Switzerland, United Kingdom.

Social and Economic Value of RECREATIONAL FISHING

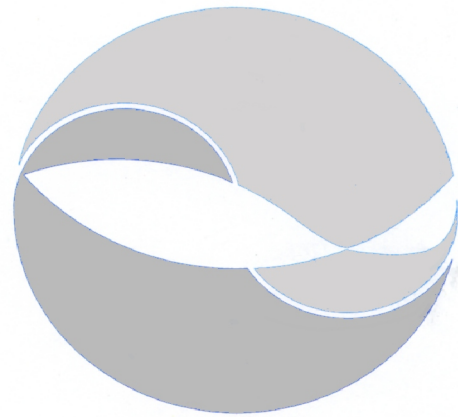


Northern and Central Europe



EUROPEAN ANGLERS ALLIANCE

EAA Headquarter



EUROPEAN ANGLERS ALLIANCE

EAA - European Anglers' Alliance

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Compiled by  Dr. Kohl, Research Consultant
on behalf of ÖKF and EAA
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Bavaria

Publication

Lederer, Mathias: Die sozio-ökonomische Bedeutung der Angelfischerei in Bayern, Diplomarbeit (Thesis) an der Technischen Universität München, Abteilung Fischbiologie. München 1997. Sponsored by the Angling Federation of Bavaria / Landesfischereiverband Bayern e. V. (supervision Prof. Dr. Herbert Stein).

Methodology

Mail survey, representative for organized Bavarian anglers = members of regional branches of VDSF (Verband Deutscher Sportfischer). Fieldwork took place in March 1997, the differentiated and well pre-tested self-completion questionnaire was sent to a random sample of 2.000 anglers, an exceptionally high redemption rate of 63% was reached, yielding a final sample of 1.259 fully completed interviews.

Special results: 31% make angling holidays, spending 723 Euro each

31% of organized Bavarian anglers make angling holidays, with average costs of 723 Euro per year. Angling tourism accounts for 40% of total angling expenditure, with a fairly even split between German destinations (45%) and angling holidays in foreign countries (55%).



Hungary

Publication

Kovacs, Norbert and Füresz, György: A socio-ecologic survey on fishing in Hungary, Budapest 1999. The study was planned and sponsored by HORGÁSZ, the National Federation of Hungarian Anglers.

Methodology

Mail survey, questionnaires were published in Magyar Horgász magazine, the official magazine of the Federation of Hungarian Anglers; additionally questionnaires were distributed by local Federations to their members. 1.253 completed questionnaires were sent back. (Probably, as usual with this type of sampling, with overproportional representation of especially interested persons = intensive anglers).

Special results: High importance of angling tourism also in Hungary

50% take part in 2-3 days angling excursions, predominantly staying overnight in tent/caravan or with friends/relatives. Within the past five years, 51% have also made longer angling holidays (more than 4 days), mostly within Hungary, but also abroad (mainly Rumania, Croatia).



Dear Reader!

Recreational angling is one of the very few activities which is carried out in the same way as thousands of years ago, when man lived in harmony with nature. Then, as now, the essentials were rod, hook and line.

The physical and psychological recreation which millions of people find in fishing is a value in its own right. The beneficial effect of real recreation in the natural world can hardly be rated highly enough. Additionally, anglers provide a decisive contribution to the well being of the aquatic environment, either directly by their engagement in protection and revitalisation of lakes and rivers, or indirectly by their licence fees (which ensure an economic interest in keeping water bodies as a habitat for aquatic flora and fauna).

In the United States recreational angling is already fully recognised as an important social, economic and ecological factor. The estimated number of US anglers is about 50 million. More people fish than play tennis or golf combined. The economic impact exceeds 100 billion dollars. In the US, and also in Australia, governmental institutions have commissioned a lot of research on recreational fishing. In Europe we sometimes lack even the most fundamental figures like number of anglers. Therefore the European Anglers Alliance has started an initiative to assess, at last, reliable and comparable basic facts and figures about angling in Europe.

This summary reports on surveys done in nine countries. The five "Nordic Countries" are covered fully; the four other countries Switzerland, Bavaria, Austria and Hungary represent a geographically coherent region in the heart of continental Europe. The Board of EAA expresses its thanks to all who have made these surveys possible and especially to Franz Kohl (ÖKF / Austria) who has compiled this international summary.

Even though surveys in the most highly populated countries are still in the planning stage only, what we have now already provides evidence that angling is one of the most popular recreational activities of European people.

The original reports, naturally, contain much more information than we could present in this summary brochure. If you are interested in more detail, please do not hesitate to contact the EAA or one of the contact people listed in the appendix.


Kurt Meyer
(Vice-President)


Harm Minekus
(President EAA)

Switzerland



Publication

Schwärzel-Klingenstein, Jöri, Lüthi, Brigitte and Weiss, Thomas: Angeln in der Schweiz, Klosters 1999.

Scope, methodology and timing

This study was commissioned by EAA and the SFV (Schweizerischer Fischereiverband) with support from BUWAL (Swiss Bundesamt für Umwelt, Wald und Landschaft). The survey was designed in two stages: (1) Telephone survey (sample size 1.000) representative for the total Swiss population to assess the percentage of all Swiss anglers. (2) The main stage was a detailed mail survey within a random sample of officially registered anglers (licence holders at public fisheries, addresses supplied by cantonal authorities, redemption rate 49,9%, net sample 1.287, fieldwork in autumn 1997).

Special results: Anglers highly engaged in environmental care

39% of registered Swiss anglers are engaged in voluntary work for the protection and improvement of fishing waters and aquatic environment, spending on average 33 working hours per year.

Austria



Publication

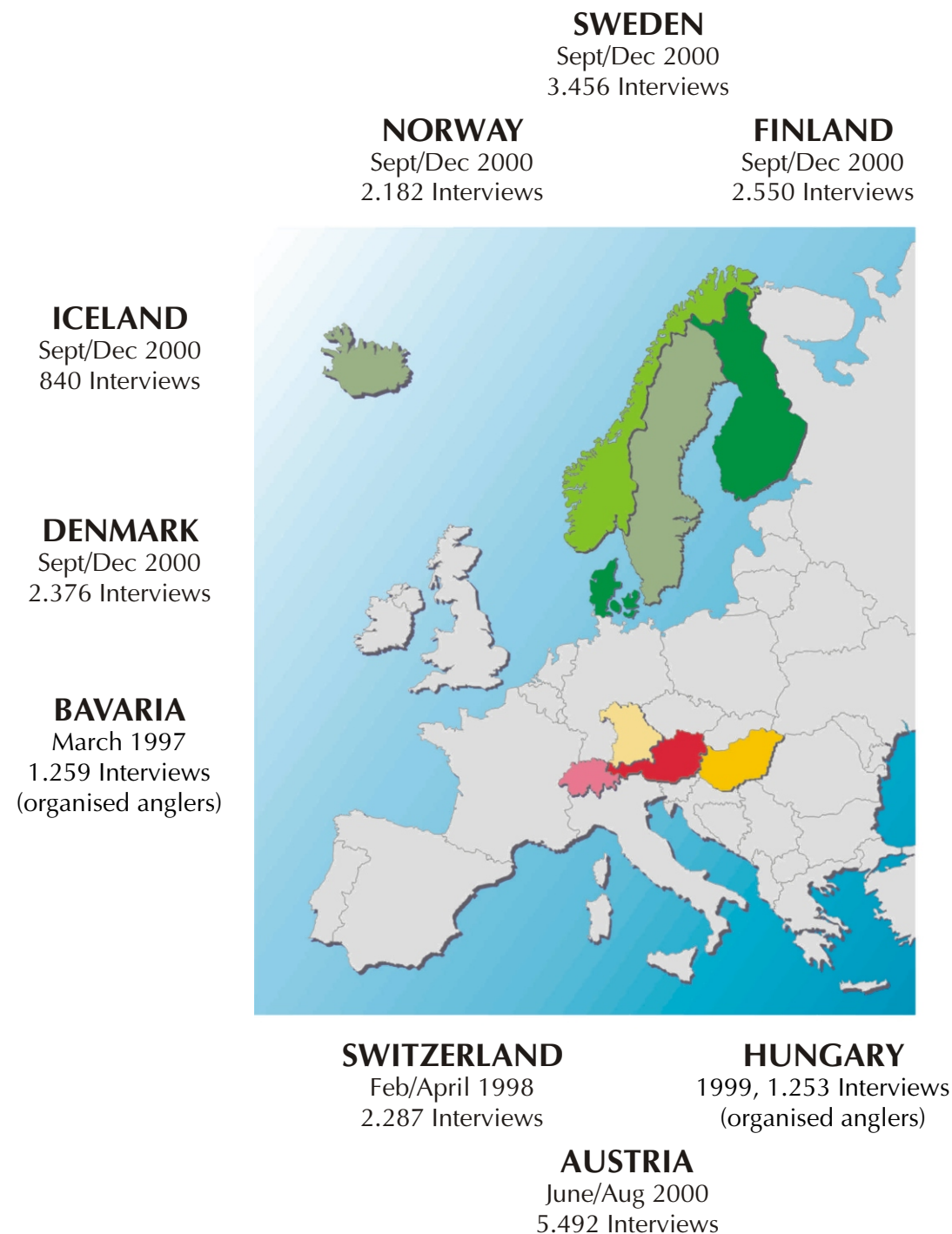
Kohl, Franz: Soziale und ökonomische Bedeutung der Angelfischerei in Österreich, Vienna 2000/01.

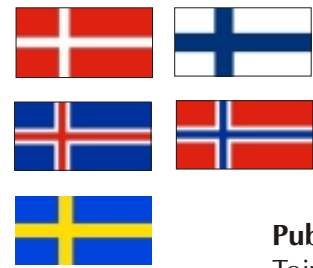
Scope, methodology and timing

This study was planned and commissioned by ÖKF (Österreichisches Kuratorium für Fischerei und Gewässerschutz) with financial support from several regional angling bodies. The survey used a standard telephone omnibus (CATI), representative for the Austrian population over 14 years of age, fieldwork June-September 2000. The assessment of percentages of active anglers and ex-anglers was based on a total sample of 5.482 interviews, 336 active anglers were interviewed in-depth. Additionally some key questions were included for ex-anglers (200) and non-anglers (722).

Special results: 27% have angling experience, good image of angling

Additionally to the 6,3% active anglers there are 21% with former angling experience, and one quarter of them have the intention to start fishing again! Many non-anglers have anglers in their family. Image of anglers regarding water protection and respect for nature is clearly positive.





Nordic Countries

Publication

Toivonen, Anna-Liisa, Appelblad, Hakan, Bengtson, Bo et al., Economic Value of Recreational Fisheries in the Nordic Countries, TemaNord 2000-604, Nordic Council of Ministers, Copenhagen 2000. ISBN 92-893-0551-7

Scope

This large-scale study was designed to cover all five Nordic countries (Denmark, Finland, Iceland, Norway and Sweden) with identical methodology. It was commissioned and financed by the Nordic Council of Ministers and was planned and executed by an interdisciplinary team of researchers from universities in all five countries.

Survey methodology and timing

Mail survey within separate random samples for each country, drawn from national population registers, representative for whole population from 18 - 69 years. Fieldwork took place from September 1999 to January 2000. Response rates were rather high, ranging from 34% in Iceland to 51% in Finland; the average response rate was 46%.

Sophisticated research concept

The research is based on an exceptionally thoroughly discussed theoretical concept of measuring "Total Value" by using the Contingent Valuation (CV) method. Details of this sophisticated concept were published in a separate methodology report. The main idea, however, can be summarised as follows: When talking about the total value and benefit of *recreational* angling it is not enough to look at the effective expenditure; one must also consider the willingness to pay more to have this recreational experience.

Special results: High willingness to pay more

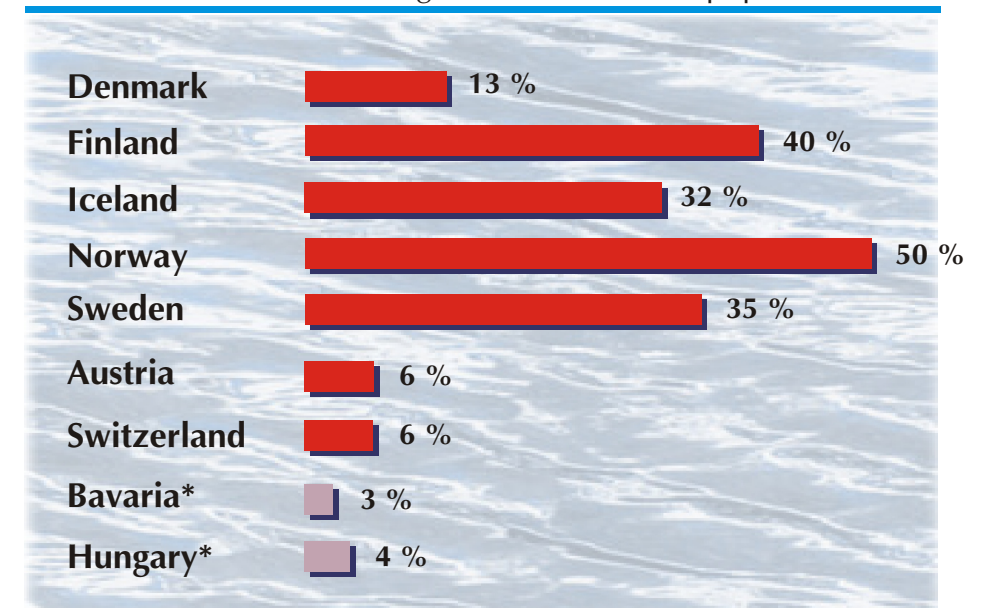
On average across the five countries the recreational anglers would be willing to spend an additional 47% over their actual expenditure.

Actual expenditure (excl. equipment)	1.070 million Euro
Willingness to pay more	504 million Euro
Total value of recreational fishing	1.574 million Euro

There are good reasons to expect that results would be similar also in other countries where this aspect has not yet been researched.

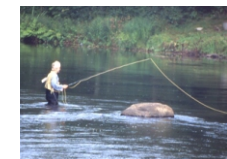
In these nine countries alone 7,9 million anglers

Active recreational anglers as a % of adult population



* organised anglers only

An "active angler" is defined as someone who has fished at least once during the last 12 months. As to be expected, there is a higher percentage of recreational fishermen in the Nordic countries. Finland is the proverbial "Land of a Thousand Lakes" and in Sweden, Iceland, Norway and Denmark almost everybody can reach an excellent fishery - sea, lake or river - in less than an hour. But the fifty percent in Norway - that's quite a surprise.



Active anglers in absolute numbers

Denmark	543.000
Finland	1.674.000
Iceland	65.000
Norway	1.773.000
Sweden	2.518.000
Austria	410.000
Switzerland	350.000
Hungary*	325.000
Bavaria*	250.000
TOTAL	7.908.000

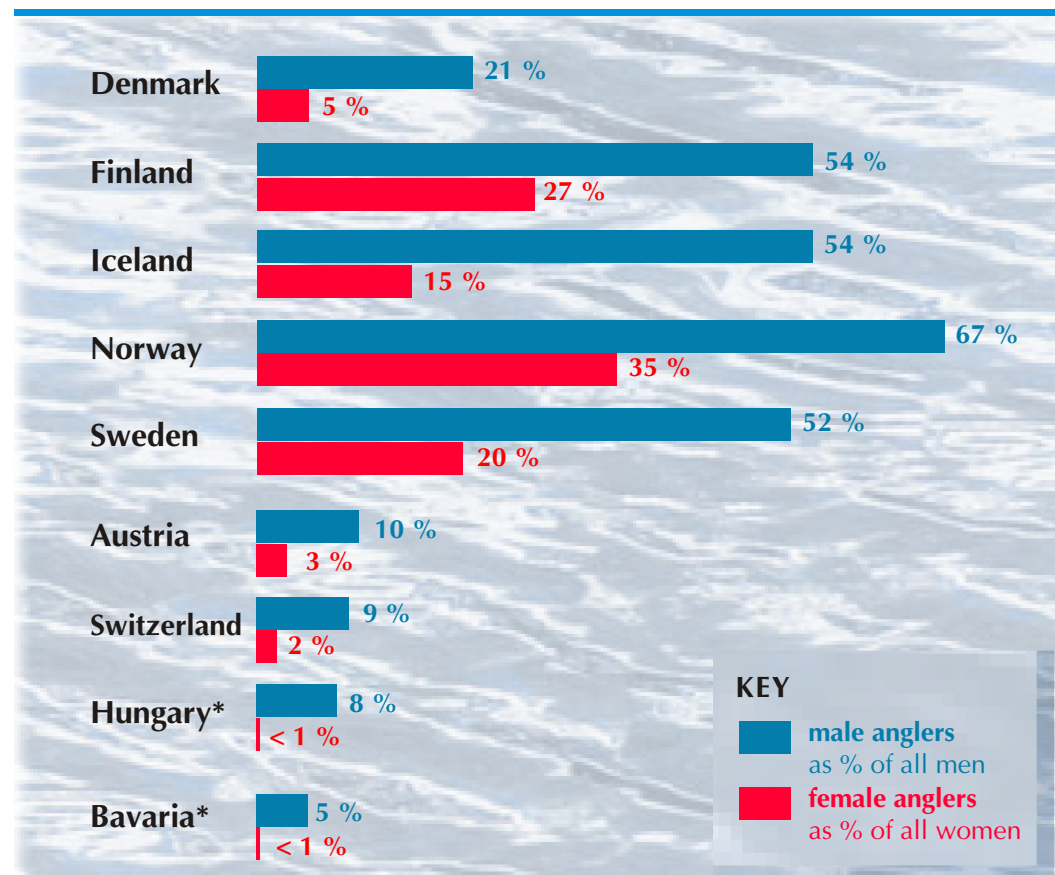
Interpretation must take into account that in some Nordic countries these figures also include "subsistence fishing" with gill nets. Conversely, the figures for Bavaria and Hungary only counted the officially registered & organised anglers. So the total number will be well over 8 million active anglers.



Surprisingly high number of female anglers



Many non-anglers think that fishing is a male-only sport. This stereotype was probably justified in the past, but the actual survey data show a different picture. It's still *male dominated*, but in many countries the number of angling women already is respectably high.



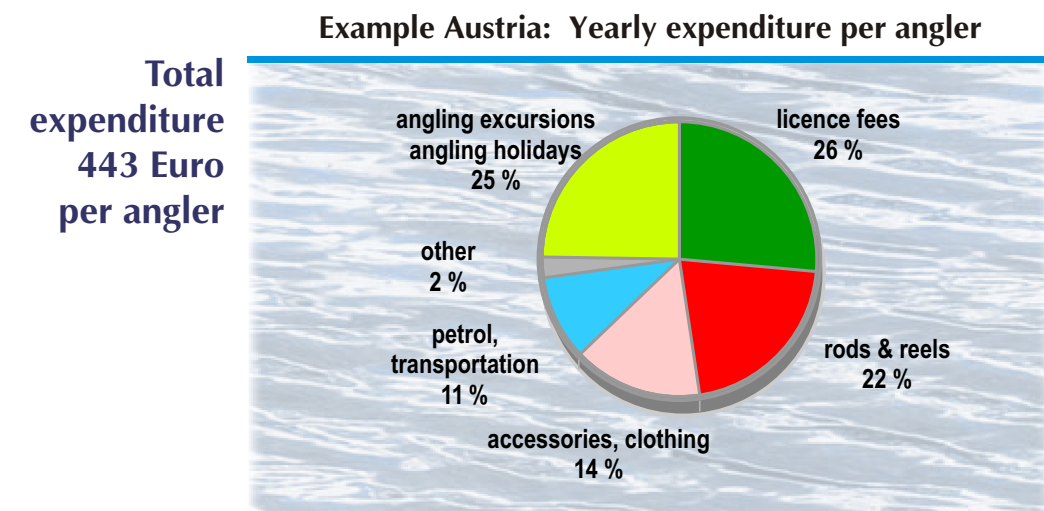
* organised anglers only

The detailed results show that female anglers go fishing less frequently - the majority being "occasional" anglers (which explains the low percentages found in Bavaria and Hungary, where only organised anglers were surveyed). They also go more often in company with friends or family, husband and children. Obviously many were encouraged by their male partners, which indicates that angling tends to become a "family sport".



A minimum of 1.5 billion Euro

The total expenditure on recreational angling was measured only in the Austrian study. In Bavaria, Switzerland and Hungary the expenditure by officially registered anglers only was asked, resulting in a high mean but neglecting the large number of non-registered occasional anglers. And the Nordic surveys, while covering all anglers, refrained from asking about the expenditure for equipment and angling clothes.



Figures for those countries therefore represent the empirically measured minimum; for the total expenditure adequate amounts for the non-covered items must be added.

COUNTRY	# ANGLERS	EXPENDITURE in Euro		Remarks
		Ø per angler	Total Spend	
Denmark	543.000	157	> 85,5 mio	
Finland	1.674.000	156	> 261,8 mio	plus expenditure on equipment, bait, angling accessories and clothing
Iceland	65.000	391	> 25,4 mio	
Norway	1.773.000	168	> 298,6 mio	
Sweden	2-500.000	158	> 397,8 mio	
Austria	410.000	443	181,5 mio	
Switzerland*	80.000	1.769	> 141,5 mio	
Hungary*	ca. 90.000	231	> 21,9 mio	plus the expenditure of non-registered anglers
Bavaria*	ca. 125.000	564	> 70,6 mio	
TOTAL			> 1.484,6 mio	

*) officially registered anglers only

An added value of 1.5 billion Euros is equivalent to 50.000 jobs.

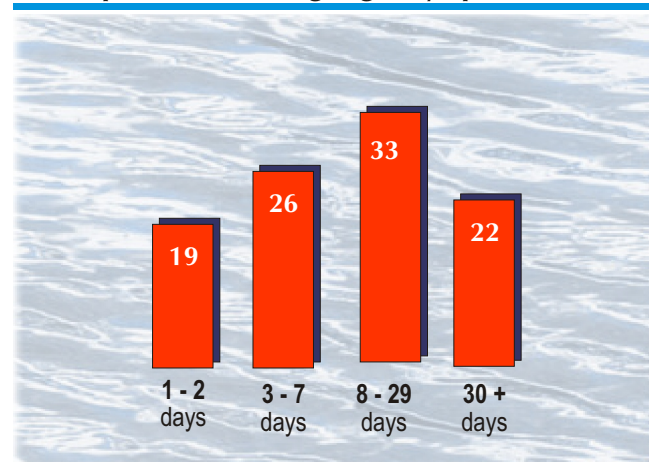


Big differences, ranging from once a year to 250 times

There are big differences between anglers regarding frequency and intensity of fishing - a common phenomenon with sporting and recreational activities. There are occasional anglers who fish only once or twice a year, and at the other end of the range we find intensive anglers who fish more than 30 days, in some cases up to 250 days per year.



Example Austria: Angling Days per Year (%)



Also, averages per country vary considerably. However, this is also influenced by the fact, that in the Bavarian, Hungarian and Swiss studies, this question was only asked of *officially registered organized* anglers whereas in Austria and in the Nordic countries the figures relate to *all* anglers.

It is also to be expected that in the Nordic countries, where easy access to fishing waters favours a high percentage of occasional anglers, the average number of days fished each year will be relatively small.



COUNTRY	NUMBER ANGLERS	ANGLING DAYS	
		Ø	Annual Total
Denmark	543.000	12,1	6,6 mio
Finland	1.674.000	18,8	31,5 mio
Iceland	65.000	7,9	0,5 mio
Norway	1.773.000	12,9	22,9 mio
Sweden	2.500.000	13,2	33,3 mio
Austria	410.000	23,3	9,6 mio
Switzerland*	80.000	48,0	> 3,8 mio
Hungary*	ca. 90.000	61,0	> 5,8 mio
Bavaria*	ca. 125.000	44,0	> 5,5 mio
TOTAL			> 119,4 mio

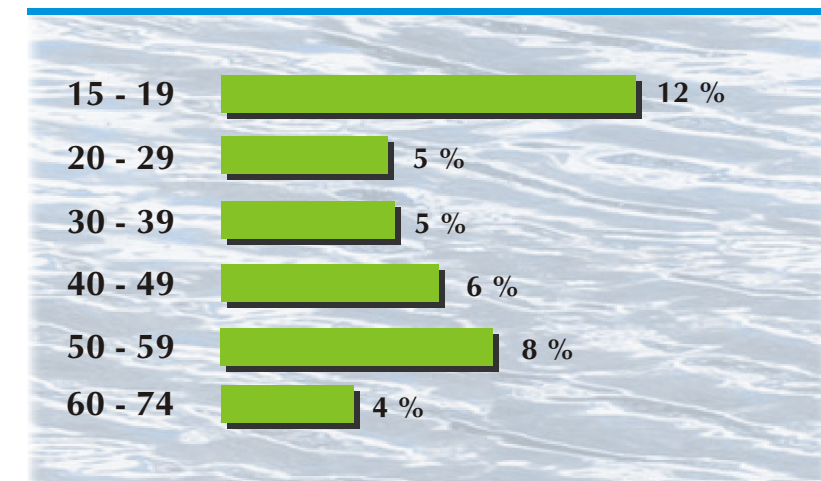
*) *officially registered anglers only*

Youthful up to highest age



Angling can be exercised until highest age. But it is far from being an "old" activity. On the contrary, it is the teenager category where angling participation is at its highest, by far. Exact data by age are available from Swiss and Austrian studies; for Bavaria and Hungary indirect evidence is provided by the low "starting age".

Example Switzerland: % anglers by age



In fact, children and teenagers show enormous interest in fishing. In the inland countries there are much more youngsters who would like to fish than there are fisheries available to them. The "Youth-Angling-Camps" offered by many angling clubs are regularly overbooked within days after being announced.

As the Swiss and Austrian data show, not all youth anglers continue to fish when they reach their twenties. To a large part this is simply due to the fact that more time has to be spent on career, family and domestic duties. For angling clubs this poses a double challenge.



Firstly, to cater for the many interested children and teenagers, with motivating instructions and adequate angling opportunities; secondly, when they grow older, to keep in contact and to motivate them to start again when diminishing time pressures allow it (*or when their children are old enough to accompany them on angling excursions*).



Early starts ...

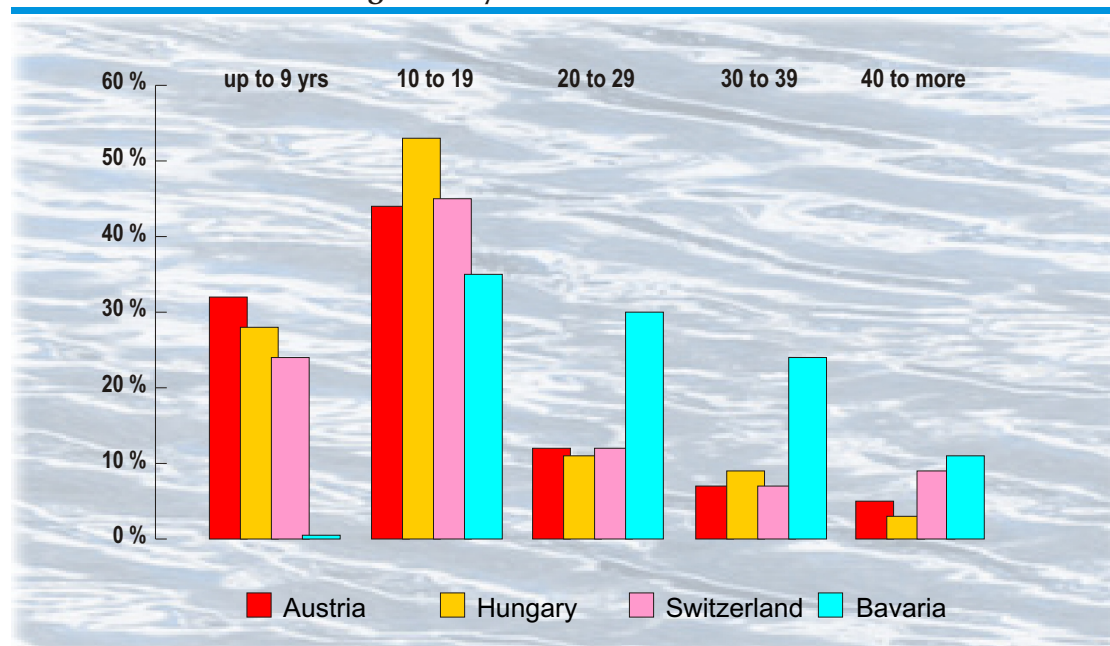
The vast majority of anglers has started angling as children or in their teenage years. In Austria and in Hungary the average starting age is 15 years, in Switzerland 18 years. For the Nordic countries (where this question was not asked) a similarly low starting age can be assumed because of the general popularity of angling and the easy access to all sorts of fisheries.



Nature and recreation more important than catch

Anglers would not go fishing on empty waters with no chance to catch. But experiencing the natural environment and recreation are more important motives than landing many fish or big fish.

At which age have you fished for the first time (%)



Only in Bavaria was a significantly higher average starting age (of 27 years) observed. This is probably a result of the quite restrictive access rules - German laws forbid angling for children under 10 years and later a quite demanding angling exam is mandatory.

Example Austria

LEGEND
■ main motives
■ secondary motives

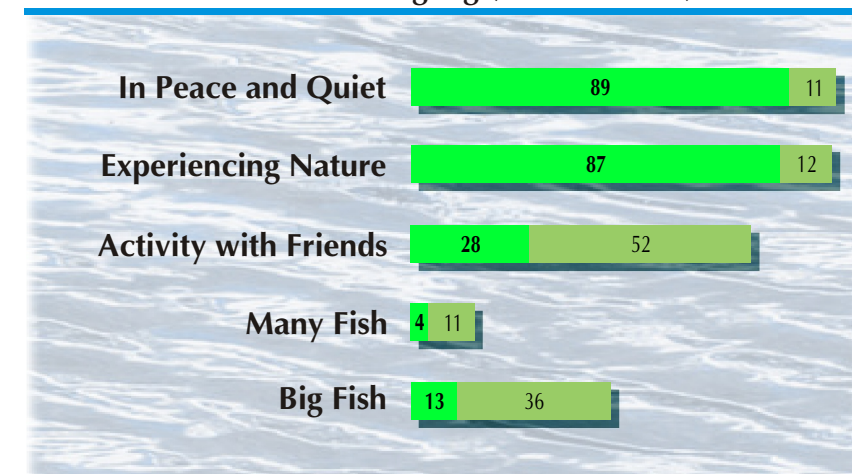
Motives for Angling (answers in %)



Example Bavaria

LEGEND
■ very important
■ partly

Motives for Angling (answers in %)



In Switzerland only a shortened list of motives was asked, results were 81% Nature, 9% Activity with Friends and only 3% Catching many Fish. In Hungary the results were: 54% for Nature, 36% Joy of Catching Fish and 19 % Pleasant Hours with Friends.

