National Strategy for Angling Development

Market Research

2015

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Introduction

This study comprises of a desk review of current market research available by country and product. Markets are evaluated based on species targeted, customer requirements, facilities required, area and guiding needs. The study also identifies gaps in current market research and will give recommendations to address these gaps.

While some information is available on domestic angling, there has been an absence of recent in-depth research on overseas angling tourism. An Economic Evaluation of Irish Angling by B.J. Whelan was published in 1988. More recently, Fáilte Ireland have undertaken a number of angling research assignments and reports including an Angling Tourism Marketing Strategy (2007) in conjunction with the Central Fisheries Board and a New Strategy for Irish Angling Tourism (2009). In 2012 Tourism Development International (TDI) was commissioned to undertake a Socio-Economic Study of Recreational Angling in Ireland. While this study is very detailed in terms of the domestic and Northern Irish market it is not very representative as far as overseas markets are concerned.

However, for two of the main overseas markets, the UK and Germany, very detailed and representative information is available. Fáilte Ireland, in conjunction with a number of publishing houses and IFI, carried out two comprehensive online surveys for both markets (Survey of GB Anglers 2011 & On-line Survey – German Anglers 2012). Unfortunately, similar surveys are not available for any other markets. Nevertheless, this study seeks to address this information deficit by providing information based on anecdotal reports, other surveys and interviews which will help decision making both in respect of marketing and product development.

Angling Tourism in Ireland

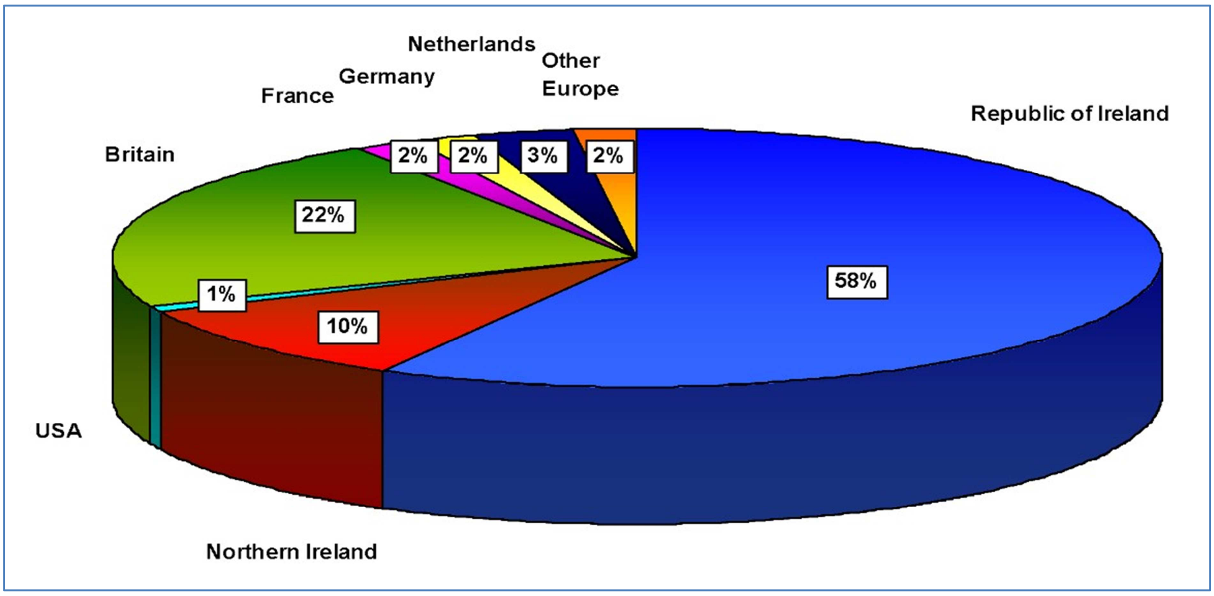
Ireland is recognised generally as being an outstanding angling destination in Europe due to the vast variety and quality of fishing available. The warm waters of the North Atlantic Drift provide the country with a relatively mild climate, delivering a good mix of cold and warm water fish species. It is a fishing destination which is traditionally known for its pike and salmon fishing, however, brown trout fishing in lakes and sea angling has always been popular amongst domestic and visiting anglers alike.

Inland Fisheries Ireland is the state agency responsible for the protection, management, conservation and promotion of Ireland's inland fisheries and sea angling resources. Ireland's 74,000 kilometers of rivers and streams and 128,000 hectares of lakes all fall under the jurisdiction of Inland Fisheries Ireland. Both Inland Fisheries Ireland and Fáilte Ireland are involved in the promotion and marketing of angling tourism in Ireland.

In their market profile, TDI identify the UK, Germany, France, the Netherlands and the US as the main overseas markets (figure 1) with the UK (incl. Northern Ireland) being by far the biggest international market. Fáilte Ireland also identifies Britain, France, Germany and the US as the key markets as far as overseas holiday makers are concerned. However, Fáilte Ireland list Mainland Europe with 59%, before Britain with 34%, of market share (figure 2).

For that reason, the study will mainly focus on these 5 major markets (UK, Germany, France, the Netherlands & the US). The domestic market has been assessed in great detail by TDI in their 2012 report.

Figure 1: Overseas & domestic angling markets



Source: Socio-Economic Study of Recreational Angling in Ireland (TDI 2012)

Figure 2: Overseas angling markets Fáilte Ireland (in %)

	Angling	Cycling	Equestrian	Golf	Hiking/Walking
Britain	34	14	19	38	20
Mainland Europe	59	68	44	28	58
France	*14*	*14*	*7*	*6*	*13*
Germany	*24*	*17*	*12*	*7*	*18*
North America	7	10	37	29	18
Other long haul	-	8	-	5	4

Source: Activity product usage among overseas visitors in 2013 (Fáilte Ireland 2014)

Recreational Anglers in Ireland

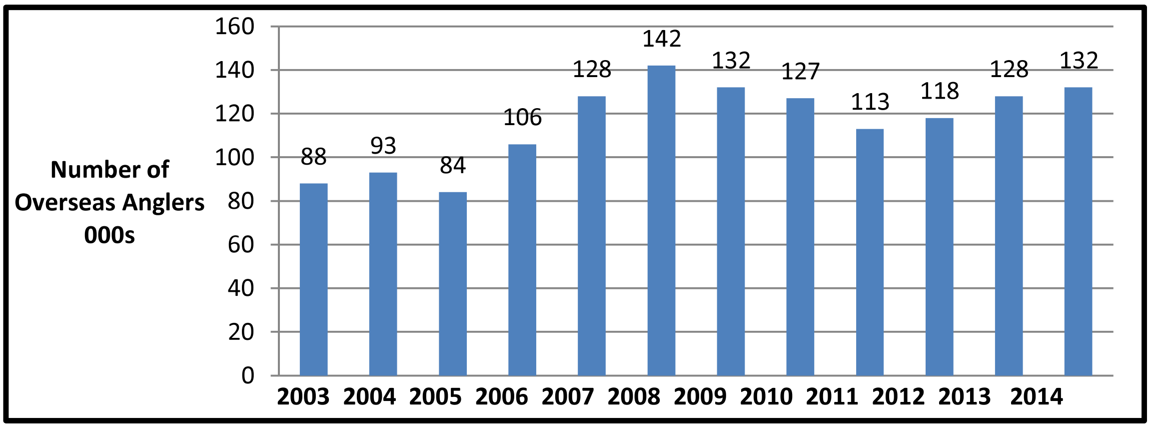
According to the IFI's Socio-Economic Study of Recreational Angling in Ireland in 2013, up to 406,000 individuals participated in recreational angling in Ireland in 2012. Of the 406,000 individuals who took part in recreational angling in 2012, 252,000 were Irish adults. Domestic anglers therefore account for over half (62%) of recreational anglers in Ireland. Northern Ireland also represents an important source with Northern Ireland anglers accounting for one in ten (10%) of recreational anglers (41,000 visits).

Overseas anglers account for 28% of all recreational anglers which equates to approximately 113,000 anglers (see figure 1). However, when compared to other sources such as Fáilte Ireland's visitor statistics, the contribution of Dutch anglers to the overall number of visiting anglers seems way too high in the TDI study.

International Angling Numbers to Ireland

While the number of overseas anglers has declined over recent years, the overall proportion of visitors engaging in angling has remained at approximately 2% over the last decade (Fáilte Ireland 2013). Figure 3 shows the number of overseas visitors who have participated in angling between 2003 and 2014 (Fáilte Ireland).

Figure 3: International visitors to Ireland participating in Angling 2003 – 2014 (Thousands)



Source: Fáilte Ireland Tourism Facts 2003 – 2014[1]

[1] Lower bound estimate based on Fáilte Ireland overseas tourism figures of 7,604,000 for 2014

In 2013 visitors from Britain account for approx. one third of our overseas anglers, while 59% came from Mainland Europe with Germany being the biggest Continental market (24%) (Fáilte Ireland 2014).

Stay and Spend

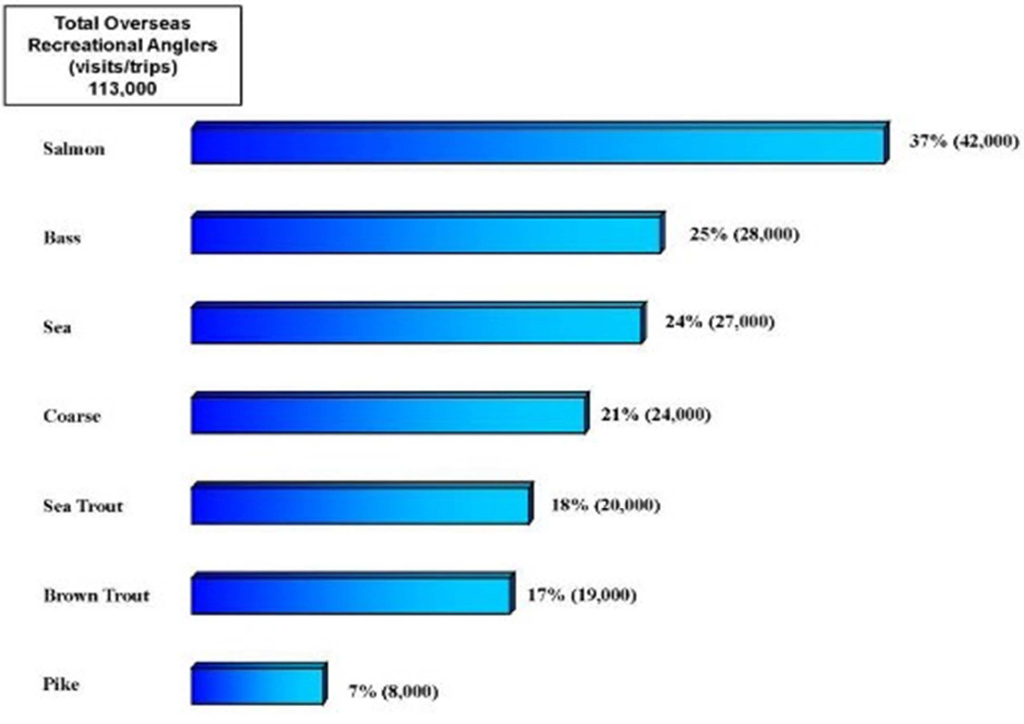
According to a Fáilte Ireland survey conducted in 2011 overseas angling tourists have a longer than average length of stay and spend on average more compared to all overseas visitors. Anglers are an important contributor to the regional distribution of bed nights, particularly along the South West and the Wild Atlantic Way

- Overseas anglers have a longer than average length of stay (11.9 nights) compared to all overseas visitors (8.2 nights).
- Anglers spend on average €15 more than overseas visitors per day generating an overall spend of €858 per angler.
- Anglers tend to stay in rented accommodation (27%) or with friends/family (22%). German anglers in particular have a high preference for self-catering accommodation. Guesthouses & B&Bs are twice as popular amongst anglers (16%) compared to hotels (8%).
- Anglers spend over two-thirds (68%) of their money on bed and board and food and drink while staying in Ireland, this compares to an average of 62% for all visitors.
- The number of regional nights spent in the West increases significantly for those engaging in angling (29% compared to 17% for all visitors).

Type of Angling

There is very little robust data available in terms of the type of angling preferred by domestic and overseas anglers in Ireland. Several organisations conducted a number of surveys in recent years. However, those surveys lack significance in relation to sampling techniques, timing, selection process and weighting criteria, and as a consequence aren't representative enough to generate meaningful data sets. Figure 4 indicates overseas angler participation in recreational angling by category during 2011. Please note that the sample size was only 290!

Figure 4: Overseas angler participation in recreational angling by category in 2011



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

Gaps in Current Market Research

While there is very comprehensive and detailed information available with regard to the UK and German markets, very little robust data is available for the rest of the world. Fáilte Ireland in conjunction with Inland Fisheries Ireland carried out two very detailed online angling surveys in the UK (2011) and Germany (2012). These comprehensive surveys are somewhat representative and provide a detailed insight into both markets. Detailed results of these surveys are included in Appendix 1.

Unfortunately, no comparable research is available for other key markets such as France, the Netherlands, Italy or the US. Therefore it would be desirable if similar surveys could be conducted in above markets.

There is also a need to acquire more accurate figures as far as the type of angling (discipline and target species) is concerned as existing data sets compiled by both Fáilte Ireland and TDI are not representative and robust enough. This is the case with regard to both domestic and visiting anglers.

Economic Contribution of Angling in Ireland (based on discipline)

As has been mentioned previously, until recently very little had been done to estimate the contribution of the Irish angling resource to the Irish economy. In 2012 Tourism Development International (TDI) on behalf of IFI conducted their 'Socio-Economic Study of Recreational Angling in Ireland' to try and gather information relating to domestic anglers and the level of angling tourism from overseas markets. Anglers were surveyed at given angling locations and asked to provide information detailing their expenditure patterns as well as their motivations and angling preferences corresponding to their 'current angling trip'. The report, which was published in 2013, estimated the total economic contribution of recreational angling in Ireland to be approximately €755 million with an estimated 406,000 individuals having participated in angling over the course of 2012. This figure included 252,000 domestic Irish anglers, 41,000 trips from Northern Irish anglers and 113,000 from overseas markets. The estimated 252,000 Irish anglers represented some 7% of the adult population aged 15 years or more.

More recently, in 2015 IFI commissioned an omnibus survey in conjunction with Millward Brown which suggested that some 7.6% of the population aged 15 years or older considered themselves to be recreational anglers; this gives an increased total of 273,600[2] domestic anglers based on April 2014 population data (CSO). The margin of error for the omnibus survey was +/- 1.53% with 95% confidence (at 50% reporting incidence) based on 4044 face to face interviews.

In the NSAD Economic Analysis documents the key markets for the main categories of angling in Ireland have been examined and expenditure estimates have been made for each based on the most current data available. The angling categories under examination have been broken down under the following headings; bass and sea angling; pike angling; coarse angling; brown trout angling; and, finally, salmon and sea trout angling. The key markets which have been focused upon are those of Irish domestic anglers, Northern Irish anglers and overseas anglers.

In estimating the total annual expenditures for domestic Irish anglers, three different data sources have been utilised: Source A uses annual expenditure figures as reported by domestic anglers surveyed for the 2013 TDI report along with current angler participation estimates based on the 2015 omnibus survey; Source B uses average annual expenditure figures as reported by all angler types in the TDI report along with 2015 omnibus participation estimates and, finally, Source C uses participation figures based on angler participation estimates in conjunction with mean daily and overnight expenditure figures as reported across all angling types in the 2013 TDI report.

Overseas angler numbers for 2014 have been calculated by using Fáilte Ireland's Tourism Facts publications for the years 2009 through 2013 (Table 1) to estimate tourist anglers as a percentage of total visitors. The final estimated overseas tourist angler figure of 132,000 was calculated using the lowest figure available for overseas anglers as a percentage of total overseas visitors cross referenced against Fáilte Ireland's actual overseas visitor figure for the year 2014; this was done in order to prevent over-estimation of the final

[2] 3,600,000 population over the age of 15 x 7.6%

overseas angling tourist figure. Figures for visiting Northern Irish anglers for 2014 have remained the same as estimated for 2012 as there is no sufficient data source to estimate otherwise.

Table 1: Fáilte Ireland Overseas Visitor Numbers 2009 – 2014

Year	Number of Overseas Visitors to Ireland	Number of Overseas Anglers	Overseas Anglers as a Percentage of Total Overseas Visitors
2009	6,555,000	132,000	0.0201
2010	6,037,000	127,000	0.0210
2011	6,505,000	113,000	0.0174
2012	6,518,000	118,000	0.0181
2013	6,986,000	128,000	0.0183
2014	7,604,000[3]	144,400[4]/132,000[5]	0.0190[6]/0.0174[7]

Following these analyses, the total contribution of angling to the Irish economy was estimated taking into account such factors as economic multipliers (i.e. the knock on effect of initial rounds of expenditure) and leakages (i.e. the economic loss associated with importing goods). A combined total valuation of angling in Ireland amounting to €836 million per annum was arrived at; this figure is €81 million above the previous estimate of €755 million calculated in the TDI study. This increased total of €836 million takes into account an increase in the numbers of visiting overseas anglers to over 132,000 (compared with Fáilte Ireland's original estimate of 113,000 in 2012) and an increase in the overall estimation of domestic angler participation rates in the Republic of Ireland from 7% to 7.6% (an increase of 21,600 anglers). These increases amount to a total of 446,600 anglers having participated in recreational angling in Ireland in 2014 compared with 406,000 in 2012; the breakdown of these 446,600 anglers is shown in Table 2.

Sea angling remains most popular form of angling amongst domestic anglers with 65,664 participants and a further 21,120 and 4,510 overseas and Northern Irish anglers respectively; gross expenditure figures for sea anglers amount to €116 million per annum. The combined total of participating salmon and sea trout anglers from all markets amounts to 128,988; approximately 48,840 of these anglers came from overseas markets. Gross expenditure for salmon and sea trout anglers amounts to €154 million.

Brown trout are the most popular single fish species with 84,962 participating anglers, 60,192 of whom are domestic, and this high figure points to the fact that brown trout are the most widespread and easily accessible fish species in Ireland. These brown trout anglers spend in the region of €109 million per annum. Both pike and coarse angling display much lower participation estimates compared with other angling types (41,482 and 42,552 respectively); however, they both show a proportionately high per angler expenditure compared with other angling types totalling €75 and €71 million respectively.

A total of 8% of domestic anglers identified themselves as anglers who prefer 'stocked fisheries' or 'other angling types'; in the absence of expenditure data for these categories of angling an average expenditure across all other angling types is presumed to be acceptable for these. Similarly, as these 'other angling types' have not been identified as areas where overseas anglers participate it is presumed that there is little or no demand for these other angling types amongst visiting anglers.

[3] Central Statistics Office, January 2015.
[4] Estimate based on anglers as a percentage of total overseas tourists 2009-2013
[5] Based on lowest previous figure available (anglers as a percentage of total tourist numbers, 2011). Actual figure 132,310.
[6] Average based on 2009-2013 figures
[7] Based on lowest previous figure available (2011)

Table 2: Estimated Contribution of Angling in Ireland by Angling Type – 2014/2015

Angling Type	Domestic Participation Estimate				Northern Irish[8] Participation Estimate				Overseas Participation[9] Estimate				Total Participation			€ Millions	
	%	Number of Anglers Total	€ Total	€ per person	%	Number of Anglers Total	€ Total	€ per person	%	Number of Anglers Total	€ Total	€ per person	Number of Anglers	Gross Expenditure Per Angler	Net Expenditure Per Angler	Gross Expenditure	Total (Inc. Multipliers)
Sea	24	65,664	€94,940,000	€1,446	11	4,510	€1,623,600	€360	16	21,120	€20,000,000	€943	91,294	€1,273	€1,731	**€116**	**€158**
Bass	4	10,944	€30,732,000	€2,808	5	2,050	€738,000	€360	17	22,440	€21,000,000	€943	35,434	€1,473	€2,004	**€52**	**€71**
Salmon & Sea Trout	23	62,928	€102,187,000	€1,623	42	17,220	€6,199,200	€360	37	48,840	€45,845,000	€943	128,988	€1,197	€1,628	**€154**	**€210**
Pike	12	32,832	€68,430,000	€2,084	5	2,050	€738,000	€360	5	6,600	€5,800,000	€943	41,482	€1,808	€2,459	**€75**	**€102**
Coarse	7	19,152	€51,300,000	€2,678	12	4,920	€1,771,200	€360	14	18,480	€17,500,000	€943	42,552	€1,659	€2,256	**€71**	**€96**
Brown Trout	22	60,192	€90,770,000	€1,508	25	10,250	€3,690,000	€360	11	14,520	€14,200,000	€943	84,962	€1,281	€1,742	**€109**	**€148**
Stocked Fisheries[10]	2	5,472	€9,521,300	€1,740	-	-	-	-	-	-	-	-	5,472	€1,740	€2,366	**€9.5**	**€13**
Other Angling Type[11]	6	16,416	€28,564,000	€1,740	-	-	-	-	-	-	-	-	16,416	€1,740	€2,366	**€28.5**	**€39**
Totals	**100%**	**273,600**	**€476,000,000**	**€1,740**	**100%**	**41,000**	**€14,700,000**	**€360**	**100%**	**132,000**	**€124,345,000**	**€943**	**446,600**	**€1,378**	**€1,875**	**€615m**	**€836m**

[8] Reported Northern Irish angler figures by angling category have been adjusted using a ratio of 0.48 to allow for the targeting of multiple species
[9] Reported overseas angler figures by angling category have been adjusted using a ratio of 0.67 to allow for the targeting of multiple species
[10] When asked to choose one type of angling in the 2015 omnibus survey some 2% of Irish anglers categorised themselves as preferring‘ Stocked Fisheries’; expenditure estimates based on average expenditure figures reported across all angling types
[11] When asked to choose one type of angling in the 2015 omnibus survey some 6% of Irish anglers categorised themselves as ‘Other Angling Type’; expenditure estimates based on average expenditure figures reported across all angling types

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 Table 2 in respect of overseas anglers (€124 million) and Northern Ireland anglers (€14.7 million) can legitimately be classified as tourist spending.

Not all of the estimated €476 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 and in the TDI report this is estimated to be 37% of total domestic angling expenditure. Taking into account overseas and Northern Ireland expenditure, total tourist angling expenditure can be estimated at approximately €315.5 million.

Table 3: Total Tourist Angling Expenditure

	Total Expenditure
Domestic Angler Expenditure	€176,300,000
Northern Ireland Expenditure	€14,700,000
Overseas Angler Expenditure	€124,345,000
Total Tourist Expenditure	**€315,500,000**

Source: TDI / 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 11,350 jobs.

Table 4: Number of Jobs Supported by Angling Tourism Expenditures (categorised by angling type)

	Domestic Anglers			Northern Ireland Anglers		Overseas Anglers		Expenditure / Jobs	
Angling Type	Number of Anglers Total	€ Total Domestic Expenditure	€ Domestic Tourism Expenditure	Number of N.I. Anglers Total	€Total N.I. Expenditure	Number of Overseas Anglers Total	€ Total Overseas Expenditure	Total Tourism Expenditure	Number of Jobs Supported
Sea	65,664	€ 94,940,000	€ 35,127,800	4,510	€ 1,623,600	21,120	€ 20,000,000	€ 56,751,400	2,043
Bass	10,944	€ 30,732,000	€ 11,370,840	2,050	€ 738,000	22,440	€ 21,000,000	€ 33,108,840	1,192
Salmon & Sea Trout	62,928	€ 102,187,000	€ 37,809,190	17,220	€ 6,199,200	48,840	€ 45,845,000	€ 89,853,390	3,235
Pike	32,832	€ 68,430,000	€ 25,319,100	2,050	€ 738,000	6,600	€ 5,800,000	€ 31,857,100	1,147
Coarse	19,152	€ 51,300,000	€ 18,981,000	4,920	€ 1,771,200	18,480	€ 17,500,000	€ 38,252,200	1,377
Brown Trout	60,192	€ 90,770,000	€ 33,584,900	10,250	€ 3,690,000	14,520	€ 14,200,000	€ 51,474,900	1,853
Stocked Fisheries	5,472	€ 9,521,300	€ 3,522,880	-	€ -	-	€ -	€ 3,522,880	127
Other Angling Type	16,416	€ 28,564,000	€ 10,568,680	-	€ -	-	€ -	€ 10,568,680	380
Totals	273,600	€ 476,000,000	€ 176,284,391	41,000	€ 14,700,000	132,000	€ 124,345,000	€ 315,329,391	11,354

In summary, recreational angling in Ireland can provide significant economic benefits to rural and peripheral regions whose natural angling resources can attract both domestic and overseas angling participants. In many cases these rural areas may be devoid of any alternative tourist attractions and angling can provide an important and sustainable source of income for both the catering and accommodation service providers in these marginalised communities. Recreational angling also has the ability to attract anglers at times outside of the main tourist seasons; the shoulder periods of March through May and again from mid-August through to October provide some of the best angling in Ireland and, as a consequence of this, they are the most popular angling months. These shoulder periods can help to extend the traditional tourist season for both accommodation and service providers with the potential to also provide increased employment and entrepreneurial opportunities within these communities.

Potential Source Markets

Fáilte Ireland conducted research in 2013 to examine the product potential of various activities in overseas markets. The research identified varying levels of interest and participation in activities. The levels of potential were identified as:

1. **Outer Potential** – the number of people who would consider participating in angling whilst on holiday abroad
2. **Inner Potential** – The number of people who have participated in angling whilst on holiday abroad in the last two years and would consider an angling holiday in Ireland
3. **Core Potential** – The number of people who have participated in angling whilst on holiday abroad in the past two years and would consider an angling holiday in Ireland during the next three years.

Germany, Britain and France offer Ireland with the largest potential markets for anglers (see figure 5). Given Britain's proximity and the fact that British anglers have to cross the sea whether to go to Ireland or mainland Europe it provides Ireland with a strong potential market. Germany with a core potential of over 4 million anglers also provides a strong potential for Ireland. German anglers however also have the draw of other mainland European countries that they can travel to by land and so may detract from Ireland. While France has a core potential of 1.8 million anglers willing to travel to Ireland for angling, they also have the appeal of mainland Europe that they can reach by land. This is coupled with the fact that French holidaymakers have a high tendency to holiday at home.

Figure 5: Potential of main markets participating in angling

	Britain	Germany	Netherlands	France
Population aged 18-75	43,680,064	61,626,142	12,162,945	45,525,337
Outer Potential				
% of population	21%	22%	15%	20%
No. of people	9,172,813	13,557,751	1,824,442	9,105,067
Inner Potential				
% of population	4%	6%	4%	4%
No. of people	1,747,203	3,697,569	486,518	1,821,013
Core Potential				
% of population	3%	5%	3%	4%
No. of people	1,310,402	3,081,307	364,888	1,821,013
Source: Fáilte Ireland, 2013				

Domestic Market

The domestic market has been thoroughly assessed by TDI. Below is a summary of the main findings. For more detailed information please refer to the Socio-Economic Study of Recreational Angling in Ireland which was commissioned by Inland Fisheries Ireland.

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+. The total direct expenditure on recreational angling by domestic anglers in 2012 was estimated to range from €371m to €497m.

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. 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.The most popular type of angling as far as day trips and overnight fishing trips were concerned were game anglers followed by sea and pike anglers (see figures 6 & 7.)

Figure 6: Estimated number of domestic angler day trips by discipline

	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

Figure 7: Estimated number of domestic overnight trips by angling discipline

	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

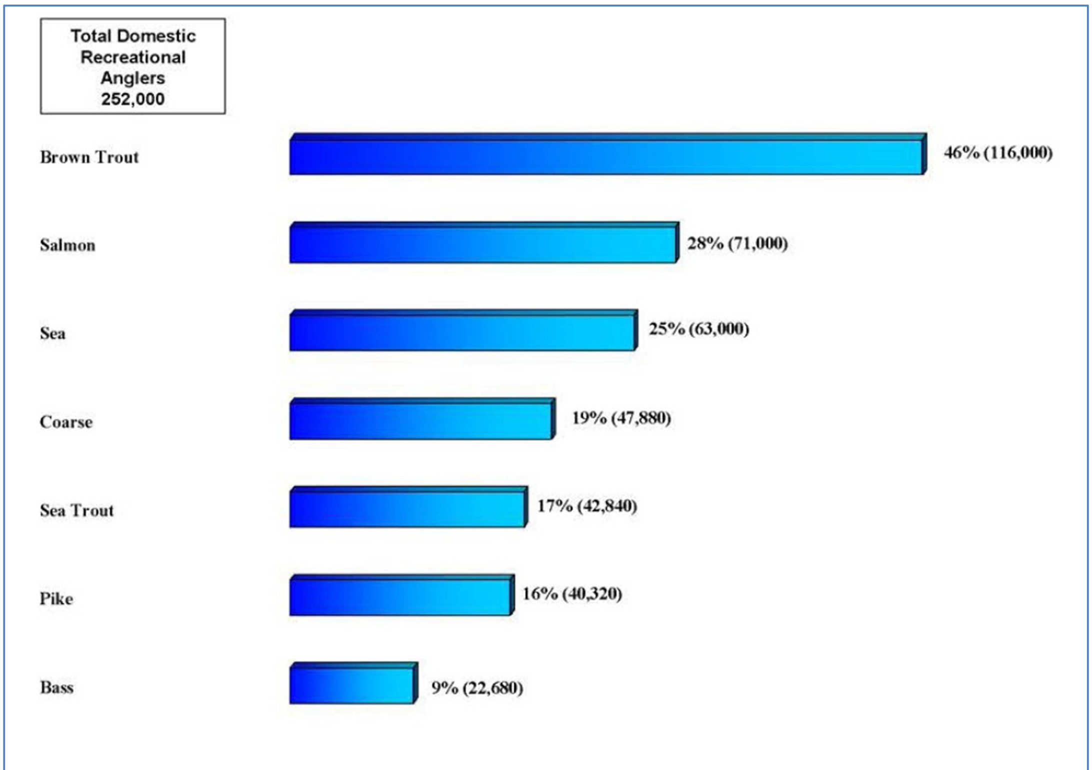
Source: Millward Brown Lansdowne/Household Survey Total Domestic Overnight Trips in 2012: 277,000. * Participation based on those undertaking overnight fishing trips in past 12 months.

In examining findings recorded from a survey of recreational anglers and Household Survey in respect of day fishing trips and overnight trips, it was possible to obtain an understanding of the pattern of domestic recreational angling in terms of species targeted. Figure 8 sets out domestic angler participation in recreational angling by category.

The TDI survey found the following patterns amongst people engaged in fishing for more than one species/category:

- Salmon – A majority of "multiple category" domestic 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 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.

Figure 8: Domestic angler participation by category



Source: Survey of Recreational Anglers

UK Market

Overview

According to an Environment Agency survey from 2010, 20% of the population in England and Wales had been freshwater fishing over the last 10 years. In detail, 6.1m people have been freshwater or sea fishing, 4.2m people have been freshwater fishing and 1.9m people have been sea fishing. The same study found that just 9% of fishermen are under the age of 30, with the average age of an angler being 49.

Overall participation in angling

• 13% of the population over 12 years said they had been fishing (freshwater and/or sea) in the last 2 years (6.1 million people).

• 9% of the population over 12 years (4.2 million people) said they had been fishing (freshwater and/or sea) in the last year.

• 11% (12%) of the population, 4.9 million are lapsed anglers i.e. have been fishing in the last 10 years but not in the last 2 years.

• 7% (6%) of the population, 3.3 million are recent anglers i.e. have been freshwater (not sea) fishing within the last year.

• Thus 20% of the population, 9.1 million people, had been fishing in the last 10 years. (EA 2010)

Sport England estimate that the numbers taking part in angling once per week stand at 134,000 with 980,000 taking part once per month Based on Sport England's Active People Survey, statistics from ADB based on third quarter of 2011

Around 2.2% of the adult population of Great Britain (GB), representing 1.08 million people, went sea angling in 2012 - 884,000 from England, 76,000 from Wales and 125,000 from Scotland (CEFAS/MMO UK 2012)

Anglers had a mean average age of 51 (Substance 2012) with nearly 20% of all anglers had some form of illness or disability that affected their physical activity, (Substance 2012).

Frequency

In 2009, UK anglers went fishing for an average of 58 days per year (Environment Agency 2010).

There was a huge range in terms of the amount of fishing that anglers had done in the previous 12 months – from no days up to some claiming to go every day of the year. The mean average was 34.6 days. However, the wide range is significant as the graph below shows and this helps increase mean averages.

- Nearly half of anglers (47.7%) went fishing on 20 days or less in the last 12 months
- The median average is 25 days (Substance 2012).

Competition anglers are more likely to go fishing more often than the general survey population – almost twice as often: the mean average of those that took part in competitions was 50 days fishing in the last 12 months (as opposed to 25 in the general population of respondents); and the median was 40 (as opposed to 20 more generally). (Substance, 2012).

Type of Fishing

In the UK, coarse fishing is the preferred type of angling for almost 60% of anglers, as opposed to 26% for game fishing and 15% for sea angling (Angling Times/Substance Research 2009). Coarse anglers comprise of specialist carp anglers but also match anglers who are targeting bream, roach, chub etc. Salmon fishing is most popular in parts of Scotland and a few rivers in Wales. However, quite a substantial number of game anglers fish for rainbow trout in reservoirs such as Chew Valley or Blagdon.

Trends in Travelling Abroad to Fish

In the UK, travel seems an important part of being an angler. In 2011, 68% of UK anglers had been on a holiday that involved angling (Tourism Ireland 2011). The most popular destinations for anglers are England, Scotland, Wales then Ireland. 17% have visited Ireland in the last three years and 28% have ever been for an angling holiday. Those who had been on an angling holiday averaged just over one a year.

Certain groups have a higher propensity to take angling holidays. Game anglers are slightly more likely to travel - possibly because the best trout and salmon areas tend to be found in specific locations such as Scotland. The 55-64 age group and those in social groups A and B are also more likely to take holidays, which is likely to be down to higher levels of disposable income. More experienced anglers are also more likely to travel. The key barriers to going on angling holidays are unsurprising and tend to reflect the commitments of 30-50 year old males in general. Family, time, work and money are all factors that stop anglers taking holidays.

Around one third of angling tourists take holidays that are solely based on fishing while the rest fit other activities around their interest to various degrees. Sightseeing, walking and culture/heritage are the most common non-angling activities they engage in. Sea anglers are slightly more likely to take holidays that included non-angling elements.

Ireland as an Angling Holiday Destination

Ireland attracts anglers from all over the UK but those regions in closest proximity tend to contain the most visitors. People from the North West of the UK are particularly likely to have been to Ireland for angling. Anglers rate Ireland highly in terms of quality of angling and accommodation. In contrast, the weather and overall value for money are considered less favourable.

Almost one-third of those surveyed in the 2011 Tourism Ireland online survey had ever been to Ireland on a holiday. As with general angling holidays, game anglers, more mature age groups, higher level anglers and those in the top social grades are more likely to have fished in Ireland. Typically, anglers will visit Ireland for a week and they are most likely to travel with friends. When asked which destination they would like to visit in future, Ireland came top with 48% of respondents choosing it. It is the first choice for sea anglers and second for both coarse and game anglers.

Of those who had been to Ireland, 68% were likely to return in the next three years. The 12% who were 'very unlikely' to go back were more likely to be over 55 and tend to have issues over value for money. The majority of anglers who had not been to Ireland said that they would like to go but had not got round to it yet. Quite a high proportion (42%) considers Ireland a more expensive destination than other places. However, Ireland was voted #1 angling holiday destination by readers of the Angling times in 2014! Coarse anglers are most likely to associate Ireland with bream, sea anglers with bass and game anglers with brown trout.

German Market

With its approx. 4m anglers, Germany is probably the most important non English speaking market as far as angling tourism is concerned. Germany is the largest outbound travel market in the world and the third-largest source of overseas visitors to the island of Ireland. According to Fáilte Ireland data (2013), German visitors account for 24% of all overseas holidaymakers which engaged in angling while visiting Ireland. For the past 5 years, the former Regional & Central Fisheries Boards and IFI attended a number of trade promotions in Germany and established excellent media contacts with the main publishing houses in Germany.

Overview

There are approx. 4m anglers in Germany of which 2.5m are organised in associations and angling clubs. With approx.70% spinning for predatory species such as pike, perch or zander is by far the most popular discipline, followed by fishing for no-predatory fish (mainly carp) (34%) and flyfishing (24%). Sea angling (20%) is also quite popular amongst German anglers. Most German anglers are male (95%) and are between 25 and 55 years old (52%). Results from a recent online survey showed that almost one in four of those surveyed was either self-employed or in a senior position. Most anglers described themselves as experienced or advanced.

Frequency

German anglers spend an average of 18 fishing days per annum. The majority of trips were for one day, the average being 1.7 days.

Type of Fishing

Pike, perch, trout and carp are amongst the most sought after species by German anglers. While on an angling holiday, Germans still prefer to fish for pike (62%) but sea angling (48%) and flyfishing for salmon/sea trout and brown trout is also very popular (45%).

Trends in Travelling Abroad to Fish

According to an online survey of German anglers (Tourism Ireland 2012), 62% of those surveyed had been on an angling holiday in the last 3 years and on average had taken 3.4 angling holidays during that time. Besides Germany, the Scandinavian countries (Norway, Denmark & Sweden) and Austria were amongst the top angling holiday destinations. However, Ireland ranked 4th ahead of North America, Spain, Italy, the Netherlands and Slovenia.

The quality of waters and angling and the proximity to the angling location were the top criteria for selecting a destination country. Summer, autumn and spring were equally popular for going on an angling holiday, while only 6% were keen on a winter trip. Self-catering is bar far the most popular form of accommodation (82%) followed by camping/caravan holidays and B&Bs. One third of German anglers book the complete holiday or at least one part of the holiday through a specialist angling tour operator.

Ireland as an Angling Holiday Destination

Ireland is very well perceived by a majority of German anglers and 41% of those surveyed considered Ireland as a likely angling holiday destination, only topped by Sweden (48%) and Norway (64%). Ireland's magnificent countryside and reputation as a great angling destination together with the renowned hospitality of the Irish are the main reasons for German anglers to book an angling holiday in Ireland. However, Ireland is still perceived as an expensive holiday destination, while the weather and driving on the left side of the road are other negative factors.

When asked which fish species German anglers associate with Ireland, 72% of those surveyed mentioned pike, followed by salmon (36%) and trout (26%). Most holidaymakers travel with friends or family and spend on average 2 weeks in Ireland. The West and Southwest as well as Co. Cavan rank amongst to most popular regions. When fishing in Ireland, spinning and fly fishing are the most practiced angling methods.

French Market

The European Anglers Alliance estimated that approximately 7% of the French adult population participate in recreational fishing. This represents some 4m anglers. According to Fáilte Ireland data (2013), French visitors accounted for 14% of all overseas holidaymakers which engaged in angling while visiting Ireland. This makes France one of the most important markets in Continental Europe. IFI and the former Fisheries Boards have a very long tradition of promoting angling in the French market and have established excellent working relationships with a number of French angling journalists and Tourism Irland Paris over the years.

Overview

French anglers are more likely to be in the 25 to 35 and 65 plus age groups, while sea anglers, in particular, tend to be under 35 years of age. French anglers are predominantly male but with 26% there is also a high proportion of female anglers. There would appear to be a high incidence of club membership in France, with 45% of anglers being affiliated. French anglers tend to be towards the AB (managerial/professional) and DE (unskilled labourer/blue collar worker) social class groups. The fishing community in France is fairly wide spread. However, a majority of anglers seem to reside in the Mediterranean and South West regions. Sea anglers in particular are strongly represented in these regions.

Frequency

While the incidence of travel by French anglers is low, frequency is relatively high for those who do travel. According to a Tourism Ireland survey (2007), more than half of French anglers (57%) had multiple holidays that included fishing. French anglers took an average of 2.8 holidays that included angling between 1997 and 1999.

Type of Fishing

Coarse angling can be found in most regions of France and is extremely popular but the excellent quality of the French home product means that there is no need or desire to travel abroad to engage in this pursuit. Pike and river trout fishing are all very popular in France with all methods being used. Many species in France are regarded as table fish with pike, trout, bass, and salmon all being regarded as prized catches for the table. Fishing regulations are complicated in France and Ireland's perceived previous lack of legislation and relaxed fishing atmosphere was always a big attraction. River trout and pike fishermen are willing to travel abroad to engage in their sport of choice, while lough style fishing for trout is relatively unknown to French anglers.

Sea Angling is by far the biggest of all of the angling disciplines in France. Bass fishing is also extremely popular with younger fishermen. Bass fishing is practiced on Atlantic and Mediterranean coasts but angling and other fishing pressure has made it difficult to catch fish in some areas.

In general, French anglers are prepared to fish across disciplines and although some do specialise they are equally prepared to have a go for trout, salmon, bass and pike.

Trends in Travelling Abroad to Fish

Only a minority (3%) of French adults participated in angling while on an abroad holiday (Tourism Ireland 2007). However, this small proportion of adult population amounts to an estimated 1.8m people. Travel for sea angling (2%) is more popular than either game or coarse angling (1%). French anglers' holidays can consist of a dedicated angling holiday, either by themselves or with a friend or group. It can also be part of a family holiday during which a day or number of days will be set aside for angling either on their own or with another family member. Some French anglers have the best of both worlds and have their family holiday (no fishing) and then have a second dedicated fishing holiday on their own, with a friend or group.

According to Tourism Ireland, the most popular holiday destinations for French angling tourists are Spain (19%) and Italy (16%). While neither specific nor detailed research is available on influences on choice of destination for the French angling travel market, some key criteria were revealed in the course of a survey carried out in France for the Marine Institute. These key criteria were: natural beauty, value for money and accommodation.

As far as accommodation is concerned, French angling tourists tend to prefer B&Bs over any other type of accommodation. French anglers sometimes use a tour operator for the first trip and will return themselves after contacts are made. Word of mouth and recommendations from other anglers is very important.

Ireland as an Angling Holiday Destination

The angling travel market from France to Ireland is small, and the trend is a declining one (-44% since 1996). However, the number of specialist anglers has remained static since 1996. Approximately 14% of French anglers have any experience of fishing in Ireland. There is also a high level of repeat visits by French angling participants to Ireland. In 2007, intentions for angling holiday destinations remained focused on the traditional popular choices such as Spain and Italy. However, with 11 % Ireland also rated quite high together with Canada (11%) and Portugal (10%).

It would appear that French anglers either hold positive views or hold no opinion about the Irish angling product. In the main, attitudes are positive but there is a low level of awareness or uncertainty, particularly on the matter of amenities for anglers. In addition, French anglers do not hold negative opinions about angling in Ireland, with no virtually disagreement with the statements (Tourism Ireland 2007). French anglers' perceptions of Ireland as an angling destination may be summarised as follows: unspoilt environment, good water quality, availability of large, wild fish, relaxed fishing regulations, uncrowded fishing locations and wet & unpredictable weather.

Dutch Market

Inland Fisheries Ireland has a long tradition of promoting angling in the Dutch market. For many years the former Central and Regional Fisheries Boards and IFI attended various trade promotions and road shows in the Benelux States and facilitated numerous media visits from the Netherlands.

Overview

There is very little up to date information available in relation to the Dutch market. A study commissioned by Sportvisserij Nederland identified a total of 1.5 Million anglers in the Netherlands in 2004 (930,000 male anglers of 15 years and older, 470,000 juveniles and 100,000 female anglers). However, the study classified some 500,000 sea anglers in the Netherlands with an average number of 4.4 sea angling trips a year per angler.

Frequency

On average, anglers in the Netherlands fished around 15 times in 2003. The total number of fishing trips (inland waters only) amount to 13.7 Million.

Type of Fishing

Coarse angling for bream and roach and fishing for predatory species such as pike, perch and zander seem to be the most popular type of angling category by Dutch anglers. Sea angling is carried out from the shore, larger charter boats and from small self-driven boats. The most important species include flatfish (flounder & plaice), mackerel, garfish, pouting, cod and sea bass. The economic contribution of sea angling is estimated around €127m per year.

Trends in Travelling Abroad to Fish

As no research on foreign travel patterns of Dutch anglers was discovered, it is not possible to estimate volume or trends. However, it is probable that a considerable proportion of these anglers are interested in traveling abroad for fishing.

Ireland as an Angling Holiday Destination

Surveys carried out by IFI while attending angling promotions in Holland suggest that Ireland is quite well perceived as a holiday destination. Over 80% of those polled indicated they would return to Ireland to fish with 45 % being repeat visitors. The majority of Dutch anglers (91%) described the quality of the Irish angling product as good.

US Market

According to Fáilte Ireland data and the recent TDI survey, US anglers only account for approx. 1% of all overseas anglers visiting Ireland. However, fishermen from the US are high spenders, particularly game and sea fishing specialists and seem to spend more per head than anglers from any other country. Data on angling trends in the US are quite limited and dated. Some general information is available from Tourism Ireland surveys.

Overview

In 2007, 16% of the US population 16 years and older (34.1 Million) went fishing. A further 10.3 million juveniles also fished in the US (Tourism Ireland 2008). Fishing ranks among the top ten family leisure-time activities, exceeding golf and tennis combined, in participation levels. While the size of the fishing community in the US is large, it is also geographically widespread. Nevertheless, there are some pockets where higher concentrations are found. For example, 3.1 Million anglers are resident in Florida, 2.4 million each in California and Texas. Whereas 1.5 million anglers live in New York and 1.6 million in Minnesota, respectively (National Survey of Fishing, Hunting and Wildlife-Associated Recreation 2007).

According to a report by Tourism Ireland, the average US angler is between 42 and 46 years old. One third of all anglers are women and anglers come from diverse racial and ethnic backgrounds. The typical angler earns more and is better educated than the average American.

Frequency

US anglers spend an average of 16 fishing days per annum. The majority of trips were for one day, the average being 1.27 days. Freshwater anglers are more frequent participants (average of 16 days) than sea anglers (average of 10 days).

Type of Fishing

The vast majority of US anglers engage in freshwater fishing (83%), while 27% go sea fishing (10% participate in both freshwater and saltwater angling). There are numerous species of fish, both native and introduced, in US waters, however it is reported that anglers are very selective about which fish they pursue.

Bass (black bass), trout, catfish and crappie rank as the four most popular freshwater species. In the Great Lakes, perch, bass, walleye and pike are most favoured. Nationwide, most anglers are focused on bass, however regional differences exist. For example, in the west more anglers pursue trout than any other species and crappie are more popular than bass in the northern part of the country.

Sea anglers are obviously less focussed on a particular species than their freshwater counterparts. Of anglers that indicate a preference, more anglers fish for flatfish (flounder & halibut) than striped bass or sea trout. However, as in freshwater, preferences vary by region.

Trends in Travelling Abroad to Fish

While no research data is available to provide information on abroad holiday destinations, consultations with US angling journalists and specialist angling travel tour operators revealed that favourite summer destinations include Iceland, Canada and Alaska (game angling, salmon & trout fly fishing). The most popular winter destinations for angling are Chile, Argentina, Australia and New Zealand.

Other Markets

Little research is available for the Scandinavian countries, Italy or Spain. However, with approx. 300,000 game anglers (salmon anglers) in Scandinavia alone this should provide good marketing opportunities in terms of our salmon angling product. Norwegian salmon anglers, in particular, don’t mind to travel and could be targeted in terms of early season salmon angling as their season starts relatively late.

Since 2012, Inland Fisheries Ireland has focused also on the Italian market while there have been little PR activities in Spain except a few media visits by Spanish journalists and film crews. Feedback from Italian trade promotions however, suggests that Ireland seems to be a fairly trendy angling destination with pike (60%) and salmon (25%) fishing being the most popular types of angling. Fishing for sea bass would also provide good marketing opportunities as would river brown trout angling and fly fishing in general. Ireland is also quite accessible from Italy. There are at least 5 direct flights from Italy to Ireland. In general, Italy with its 2.5 million anglers would be too large a market to be neglected.

Ireland’s Angling Products

The following section contains a short description of our main angling products, briefly lists strengths and weaknesses, competitors and identifies the most suitable target markets for each product.

Salmon Angling

Ireland’s salmon angling product is very competitive in terms of value for money. When compared with the cost of salmon angling in countries such as Scotland, Iceland, Russia and parts of Norway, Ireland is by far the most inexpensive destination. Irish salmon fisheries are also quite accessible which is another advantage over our competitors. This makes Ireland the perfect venue for anglers who have just started salmon fishing and tourists who do not have the budget to fish in high-cost destinations such as Russia’s Kola Peninsula. The Irish salmon fishing season is also much longer than the season in Norway and Russia where fishing does not commence before mid-June. Potential target markets include the UK, Germany, France, the Benelux States and Italy but also the Scandinavian countries and the US.

Sea Trout Angling

With the exception of Lough Currane in County Kerry, Irish sea trout do not grow to a very big size. A 1kg fish is considered a good sized sea trout anywhere in Ireland. This is a disadvantage compared to other countries such as the Scandinavian countries where anglers always have a realistic chance to catch a 5 kg plus fish. However, Ireland’s diversity in terms of sea trout fisheries (estuaries, lakes & rivers) and the sheer scenic beauty of most fisheries (particularly along the West Coast) could represent a good marketing opportunity. Main target markets include the UK and to a lesser extend France, Germany and the US.

Trout Angling (Lake)

Wild brown trout fishing on the large lakes is without doubt an outstanding product. There are very few countries where anglers have a realistic chance to catch a trophy sized wild brown trout of 2.5kg plus. However, this form of fishing (lough style from a drifting boat) is actually not widely practised across Europe and the United States. On the Continent, there is no great tradition of fishing on still waters for brown trout and almost all brown trout fishing is river based. This is also the case in the US. As a consequence, Scotland, Wales and England would be amongst the main target countries for this product. However, it would probably be worthwhile to promote this type of fishing in other European counties and to highlight the fact that anglers would be fishing for wild fish in wild places.

Trout Angling (River)

River fly fishing for brown trout is the most popular form of game angling in Continental Europe and the US. This alone should provide huge marketing opportunities with regard to the multitude of potential brown trout river fisheries in Ireland. However, with the exception of the River Suir and River Boyne catchments and possibly the Clare River in Co. Galway none of our existing brown trout river fisheries would meet the basic standards required by continental and US brown trout anglers. One of the biggest issues is actually barrier free access to and along the river bank. Nevertheless, IFI should continue to promote river brown trout fishing across the US and Europe.

Pike Angling

Pike is the number one sport fish in Germany, France, the Netherlands and Italy and also quite popular amongst anglers in the UK. Irish pike have a world-wide reputation as extremely hard fighting, fast growing and powerful predators. Ireland boasts an incredible number of top class pike fisheries including the Shannon and Erne catchments, the Cavan/Monaghan Lakelands and the Great Western Lakes. Additionally, there are myriads of other smaller, seldom fished pike waters which provide excellent sport for the more adventurous angler. All of this makes Ireland probably the number one pike angling destination in Europe; only to be rivalled by North America and Alaska's Northern Pike and Muskie fisheries. Our biggest competitors in Europe would include Sweden and the Bodden fisheries off the German Baltic coast. Pike angling is one of our strongest products and should be promoted in most countries but particularly in Germany, the Netherlands, Italy and France. However, current pike management policies may impact negatively on Ireland's reputation as a prime pike angling destination.

Coarse Angling

Coarse Angling in all parts of Ireland attracted the biggest number of English anglers into Ireland up to 1995 than any other angling product. Sadly since then in the UK, which is our biggest market, two main changes took place with the dissolution of the close season on loughs and the upsurge in carp fishing very few of the younger anglers are now coming to Ireland. In Ireland, the spread of Zebra mussels has made coarse angling harder for anglers to catch our quality coarse fish particularly on parts of the Shannon and Erne systems. However, our coarse angling product in the Shannon, Erne and on the River Lee (Inniscarra Lake) has improved and there are signs that English match anglers are starting to come back to fish the popular match festivals particularly in the autumn. Big catches of Bream and Roach in the smaller loughs in the Cavan/Leitrim areas have improved in recent years and together with the Erne loughs in the north, our product is getting stronger and we need to try different initiatives to attract more customers.

Bass Angling

Bass angling is arguably one of our top angling products. Fishing for sea bass has grown in popularity across Europe in recent years and Ireland seems to be an excellent destination for bass anglers. With the exception of the Channel Islands and possibly some areas along the French coast there are very few destinations in Europe where anglers can enjoy such high quality bass fishing. Potential target markets include the UK, France, the Netherlands, Italy and Germany. Fly fishing for bass, in particular, would appeal to many anglers that traditionally fish for sea trout along the Baltic Coast and the Danish Islands.

Sea Angling

Ireland is a fantastic sea angling destination, both in terms of off shore/inshore angling but also for beach casting and rock fishing. The wealth of different species makes Ireland a mecca for the species hunter, while the seas around Ireland also provide great opportunities for "big fish anglers" in search for blue shark and skate. Our main target markets would be the UK given its proximity to Ireland and angler profile and the Netherlands. However, we also need to target countries such as Germany, France and Italy where sea angling is very popular. Ireland's biggest disadvantage is the lack of sheltered bays and self-driven boats. Norway and to a lesser extend Iceland would be our biggest competitors as these countries offer a range of safe, self-driven small boat holidays.

Recommendations

General

There is an increasing demand for high-quality, nature-based recreational activities such as angling in international travel markets. However, the visitor demands quality and the future development of fishing products must focus on quality fishing, good angling facilities, easy access to fishing locations through effective transportation as well as on quality booking systems, making it simple to plan and book fishing holidays.

Market Research

We need to fill gaps in current market research e.g. conduct representative and meaningful angling marketing research in additional countries such as France, the Netherlands, Italy and probably the U.S. Online surveys, as recently carried out in the UK and Germany, should be the preferred method, generating additional data in relation to angling type, target species, anglers needs etc.

Publicity

Publicity is one of the most important marketing activities Inland Fisheries Ireland undertakes for angling. Anglers are hungry for the latest news and trends. Established and respected angling journalists are key influencers who, through their features, websites and blogs play a key role in promoting Irish angling. Consistent coverage of Ireland in overseas angling press and online is vital to maintaining awareness and growing business in the international market.

Promotion

An Ireland presence at dedicated angling shows in overseas markets is vital to maintaining and growing angling business in Ireland. It is an important and cost effective way for the Irish trade to sell their products to overseas markets and also gain insights into the needs and requirements of overseas anglers. The new *Angling Ireland* concept in conjunction with our partners in DCAL and the Lough Agency is clearly the right way forward. It is important to promote the Island of Ireland!

As outlined in the Department 's Tourism Policy, *People, Places and Policy – Growing Tourism to 2025 (2014)*, t is vital to promote the most appropriate angling products, species and destinations (fisheries) in the most relevant target markets (e.g. Pike & Salmon in Germany; Pike & Sea Angling in the Netherlands; Pike, Salmon & Sea Bass in Italy etc.). However, we should also develop niche products such as small boats sea angling, fly fishing for pike and lough style trout & salmon angling.

Ireland's "*Wild*" and "*Green*" image and unique angling products should also be utilised e.g. "Fishing for wild fish in wild places" or "*Fishing along the Wild Atlantic Way*".

The utilisation of *Social Media* such as Facebook, Twitter etc. will be vital to promote angling in Ireland in the future. It should also be envisaged to develop online booking systems and engines for fisheries which will help tourist anglers to better and more efficiently plan their angling holiday.

There is a need for certain standards in terms of guiding, ghillies, accommodation etc. The *Anglers Welcome* brand which was developed by Fáilte Ireland in conjunction with the Central and Regional Fisheries Boards was definitely a step in the right direction and should be reconsidered again.

Angling Services

- Provide guiding courses
- Work closely with industry (angler friendly accommodation)
- Provide workshops

Fisheries Enhancement

- Improvement of water quality and habitat
- Improvement of infrastructure, access, sign posting
- Additional provision of disabled anglers' facilities etc.

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