



National Strategy for **Angling** Development





I welcome the publication of the National Strategy for Angling Development. This Strategy sets out ambitious objectives and a set of measures closely focused on delivering an accessible and sustainable, world class, inland fisheries and sea angling resource. It is a pathway towards realising the enormous benefits which can accrue from investment in our resource while ensuring its protection and conservation through implementation of the strategy.

Inland Fisheries Ireland commissioned a report by Tourism Development International in 2012 which found that angling as a sport and tourism activity was worth €755 million to the Irish economy, supporting 10,000 jobs. Subsequent survey work and analysis in 2015 has seen these figures rising to €836 million and over 11,000 jobs. This is a very significant economic activity, but it also plays a central role in local communities, providing recreational opportunities for young and old, and encouraging participation in healthy outdoor activity. The resource itself is extensive, comprising over 70,000 kilometres of rivers and streams, 144,000 hectares of lakes and over 5,600 kilometres of coastline.

The supporting suite of documents for the Strategy includes research into and analysis of the inland fisheries resource. These reports provide base-line data on which to build; facilitate the identification and implementation of projects; and allow for measurement of impacts and outcomes into the future. This is a huge resource and I wish to congratulate IFI on its production.

The Action Measures included in the Strategy will ensure the impacts of recreational angling will reach the most rural and peripheral areas of Ireland consistent with the geographic spread of our wonderful natural resource.

The success of this Strategy is contingent upon the identification of funding, as a first step, and a highly collaborative approach. Government policy is to ensure that local government are the main vehicle of governance and public service at local level, leading economic, social and community development; therefore, the assistance and inputs of the Local Authorities with regard to funding mechanisms and implementation are important elements. However, there are a great number of other stakeholders and I encourage a level of collaboration and partnership regarding all action measures which will ensure the objectives are achieved.

Given the economic importance and scale of the inland fisheries resource, I will ensure that my Department will support implementation of the Strategy with regard to the updating of legislation, acting as an enabler to IFI and all stakeholders to achieve the growth predicated on the successful implementation of the Strategy.

I look forward to working together with the Board, staff and management of Inland Fisheries Ireland, my Department and all stakeholders to achieve the objectives of the National Strategy for Angling Development.

Joe McHugh T.D.
Minister for Natural Resources

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Executive Summary

This National Strategy for Angling Development (NSAD) marks a potentially significant milestone in the development of our national fisheries resource and is a roadmap for the development of Ireland's angling sector for the future.

Angling is uniquely placed to deliver benefits across the economically challenged areas of the country because of its comprehensive geographic and seasonal coverage. Implementation of the strategy will prioritise for development those areas which offer the greatest potential to positively deliver strategic objectives.

NSAD Vision

It is the vision of IFI to ***"provide an accessible and sustainable, world class, inland fisheries and sea angling resource for all"***. This strategy will act as a key instrument in delivering this vision for angling.

The strategy will achieve this through a broad range of conservation, protection, access, information, promotion and other works. It will greatly improve the angling sector and enhance angler experience by creating a stronger partnership and collaborative approach between relevant state agencies and angling representative organisations, clubs, associations and other stakeholders such as tourism providers. This new era will bring all parties closer together in the planning and decision making process targeting a common set of objectives for the sector.

An investment of some €25 million will be required to deliver this strategy. In return, it has the potential to grow the economic contribution of angling from its current level of €836 million to €900 million per annum and moreover support up to 13,000 jobs primarily in rural and peripheral communities where few alternative economic opportunities exist. This increased value will come through higher angling participation rates domestically and growth in overseas angling tourism to Ireland.

NSAD Strategic Objectives

A set of three strategic objectives have been established to guide the delivery of the strategy over the coming years. These will be delivered in the context of IFI's overarching conservation ethos and focus. The strategic objectives are:

1. ***Making Angling Accessible & Attractive*** through information, infrastructure and support
2. ***Tourism Development*** through the promotion of our angling resource
3. Recognition of angling as a key ***Leisure & Recreation*** pursuit

Executive Summary

NSAD Action Measures

Angling development over the lifetime of the strategy will be implemented through projects developed under the measures outlined below. The measures and associated projects will address the three strategic objectives which underpin this strategy. These measures are as follows:

1. Identify funding for this NSAD and future fisheries development and management
2. Encourage stakeholder engagement and involvement in fisheries development and management
3. Ensure sustainable development of the natural angling resource
4. Ensure protection and conservation of the fisheries resource
5. Set standards for fisheries and related services
6. Market and promote angling domestically and abroad
7. Achieve access to angling for all

Delivering the National Strategy for Angling Development

The Board of IFI will establish the National Angling Development Strategy Implementation Group which will oversee the roll out of the measures outlined in this document. The initial priorities will be to identify and source funding streams which will be critical in facilitating the implementation of the strategy and to inform and engage stakeholders in the process.

Strategy Development Process

In formulating the National Strategy for Angling Development IFI conducted a number of research streams including economic analysis, market research, product evaluation and public consultation. The outputs of this research, which inform this strategy document, are available from www.fisheriesireland.ie/nsad. Additionally a strengths, weaknesses, opportunities, threats (SWOT) analysis was carried out to inform another element of the strategy development process (see page 28).

Opportunities for Angling Development

The strategy aims to increase angling tourism activity to 1999 levels of 173,000 individual visits from overseas/tourist anglers, to re-engage lapsed domestic anglers and introduce more of Ireland's population to angling for recreation and leisure. This supports the Government's primary objective in tourism, i.e. to maximise the overseas tourism revenue while recognising that domestic anglers underpin the entire gamut of the angling offering (by supporting the conservation of the angling resource and its environment, accommodation and service provision) this dual approach provides competitive advantage to Ireland in the international market.

An essential aim of the strategy is to further increase the numbers of both domestic and overseas anglers who regularly participate in angling in Ireland. Should future overseas participation figures reach the historical figures estimated for the year 1999, the increase in associated net expenditure would approach €41 million annually and support an extra 1,400 Irish jobs. Furthermore, an increase in domestic angler participation of 0.5% would increase combined domestic and overseas tourism related direct expenditure to €53 million and support 1,800 jobs.

Introduction

Inland Fisheries Ireland (IFI) is the agency responsible for the protection, management, conservation, promotion and development of Ireland's inland fisheries and sea angling resources. Ireland's 74,000 kilometres of rivers and streams, 128,000 hectares of lakes and over 5,500 kilometres of coastline all fall under the jurisdiction of IFI. IFI works to ensure efficient and effective management of the national angling resources; a more streamlined, coherent and integrated national policy formulation and delivery; and improved stakeholder engagement and communication.

The National Strategy for Angling Development (NSAD) is the first comprehensive national framework for the development of our angling resource. The strategy will deliver a wide-ranging set of investments, innovations and promotions over the coming five years. This will ensure that our fish stocks and angling infrastructure are protected and enhanced for both their economic value and for the recreational benefit to the communities and visitors they serve across Ireland. Effective and sustainable implementation of the strategy will ensure stability of existing jobs and businesses reliant on angling and the creation of new jobs as the economic impact of angling grows.

The strategy will also ensure that our angling resource is protected and conserved in an environmentally sustainable manner for future generations to enjoy. Fundamentally, this strategy will strive to make angling an accessible and attractive pursuit for all. In this regard, the strategy is the foremost statement of intent for the future of our angling resource since the establishment of IFI in 2010.

A set of three strategic objectives has been established to guide the delivery of the strategy over the coming years. These strategic objectives set focus for Ireland's angling resource, and its development into the future. These three strategic objectives are:

1. **Making Angling Accessible & Attractive** through information, infrastructure and support
2. **Tourism Development** through the promotion of our angling resource
3. Recognition of angling as a key **Leisure & Recreation** pursuit

Each of these strategic objectives will be discussed in section 2 of this document.

Introduction

Backdrop to the strategy

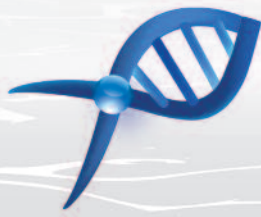
A range of reports have highlighted Ireland's unique status as an outstanding angling destination reliant on its natural and unpolluted environment. The inland fisheries sector, however, has only had the benefit of one major investment programme in modern times. The Tourism Angling Measure (TAM) in the 1990's recognised the potential of the sector to contribute to rural and economic development. By 1999, overseas anglers visiting Ireland peaked at 173,000 individuals.

Since the conclusion of this programme, and due in part to the economic climate, angling development has reduced to a level where investment and development is urgently needed. This investment is required to ensure that the existing economic contribution (€836 million and over 11,000 jobs – Source: Economic Analysis link provided in Appendix I) of angling is not compromised and to leverage increased tourism and the associated economic impacts and job creation. IFI continues to recognise the potential of the sector and the strategy is a clear commitment by the agency to the on-going development and marketing of the Irish angling resource. The final section of this strategy provides a summary assessment of the contribution of angling to the Irish economy through domestic angling expenditure and angling tourism.

By aiming to increase angling tourism activity to 1999 levels, through re-engaging lapsed domestic anglers in the sector and introducing new participants to angling, there is potential to improve the economic impact and number of jobs supported by an estimated €60 million per annum and 1,800 respectively.

IFI's vision is ***"to provide an accessible and sustainable, world class, inland fisheries and sea angling resource for all"***. This vision will be supported by the strategic objectives set out in Section 2 and the action measures in Section 3 of this strategy.

The strategy acknowledges IFI's core remit of conservation and protection of Ireland's inland fisheries and sea angling resource and the fundamental part of the angling experience: the opportunity to catch fish.



National Strategy
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Strategic Objectives of the NSAD

Strategic Objectives of the NSAD

Angling is uniquely placed to deliver benefits across the lesser-developed areas of the country because of its comprehensive geographic and seasonal coverage. Implementation of the strategy will ensure that the areas which offer the greatest potential to positively deliver the strategic angling development objectives are prioritised for development.

The National Strategy for Angling Development is a development framework to allow angling to increase the economic impacts of inland fisheries and sea angling in the Irish economy, while improving the resource for domestic participation.

IFI is committed to the delivery of the strategy in a manner that: prioritises projects which have the greatest potential to improve angling's impact from a social and economic perspective; complies with all legislative requirements including the Water Framework Directive and Habitats Directive amongst others; uses a partnership approach with other statutory and non-statutory bodies, agencies and organisations; supports rural and local communities through angling development; is sustainable and resilient; maximises training and employment opportunities; and ensures 'access for all' and social inclusion in angling participation.

The total cost of implementation of the strategy over its lifetime has been estimated at €25 million. This covers a wide range of development activity such as information provision, promotion, training, research and development, licencing and legal compliance along with physical access and infrastructure projects and investment in key angling resources and equipment.

Conservation & protection of our fish stocks

The future health of Ireland's angling resource is dependent on ensuring that our fish populations and habitats are protected and conserved.

To ensure that conservation and protection remain fundamental to this strategy IFI has developed an Environmental Charter. IFI's environmental charter recognises its special commitment to the environment in its activities and takes full account of the objectives of sustainable development from ecological to economic and social perspectives. The charter is also a functional tool that assists in the planning and preparation process when undertaking work programmes that may have an effect on the environment. Through adherence to our Environmental Charter IFI can ensure that there is compliance with all statutory and non-statutory considerations as they correspond to the relevant stages in the plan-making process.

IFI will refer to the Environmental Charter in the implementation of the strategy. The full charter is available on www.fisheriesireland.ie.

Strategic Objectives of the NSAD

SO1: Making Angling Accessible & Attractive to all

Participation in angling can provide many health and well-being benefits by affording the opportunity to spend extended time in the outdoors environment. Angling is a wide and varied pursuit which can be sedentary or active, practiced socially or in solitude and appeals to a wide range of people with different interests and capabilities. By improving accessibility to angling, the numbers participating in the sport can be increased, making better use of the resource both as an amenity and a source of economic revenue.

The first step in making angling more accessible will be to improve the take up of angling by the younger generation. This will involve ensuring that young anglers have access to qualified coaching at properly organised events run at suitable venues. Physical access needs to be improved too, as much of the access to our angling venues is in need of refurbishment.

Access and title to fisheries was identified as an important issue in the public consultation process undertaken to support this strategy. Title uncertainty on some fisheries can hinder access and prevent development and therefore an improved clarity of fisheries title is required. Finally, to ensure easy access to participation in angling, other elements, including access to qualified guides, angler friendly accommodation, signage, and access to up to date information both in print and online, need to be addressed. The strategy preparation has identified gaps in the provision of many of these services, and these can now be addressed as part of the implementation of this National Strategy for Angling Development.

SO2: Tourism Development

Angling has traditionally formed a core part of the Irish tourism product and after some years of decline is growing in popularity again. Fáilte Ireland estimates that approximately 2% of all overseas visitors are angling tourists which equates to over 132,000 visitors per annum. The domestic tourism impact is greater with a large proportion of the estimated 273,000 domestic anglers engaging in day trips and over-night angling breaks.

The core thrust of current tourism development policy is centred around our natural environment and the outdoor experience with an emphasis on adventure, food and relaxation. Angling is perfectly placed to deliver an outstanding experience for visitors, domestic and overseas, and is perfectly located to capture the growth in visitors through high level marketing campaigns such as the Wild Atlantic Way where some of the best fisheries products are located.

The strategy will drive investment in, and promotion of, our angling resource for the expansion of tourism related angling and seek to enhance Ireland's international reputation as a key destination in the angling world. Alongside angling focused tourism, IFI and its partners can make angling more accessible and attractive to visitors as a secondary or spontaneous activity while on holiday. Building on our angling heritage and repackaging angling with other activities and better information and accessibility will drive Ireland's angling tourism impacts especially in remote parts of the country.

Strategic Objectives of the NSAD

SO3: Leisure & Recreation

Angling forms a core part of the outdoor leisure and recreation experience and is an area where IFI and its stakeholders can provide a unique offering to residents and visitors alike. There is a growing recognition of the value of outdoor recreation in underpinning health and well-being. Accessible and well developed recreation infrastructure is an important component in ensuring a healthy and inclusive society. Similarly, recreation facilities are a key component in supporting the tourism sector, with many tourism developments bringing much needed economic activity into often rural and remote areas.

A coordinated approach to managing and developing recreation through Ireland's angling resource can make an important contribution to a range of public policies at a national, regional and local level. In this regard, angling and access provision to our angling resource with support programmes and promotion will deliver wide ranging benefits to society and local economies.

Partnership & Collaboration

In order to achieve these strategic objectives IFI will work closely with a variety of agencies and organisations that have direct responsibility for activities that interact with the angling resource.

The key voluntary partners in this strategy include but are not limited to, angling clubs and angling representative organisations, fisheries owners, syndicates and other fora focusing on the recreational angling resource.

IFI will continue to foster partnership and joint working relationships for the betterment of the inland fisheries resource and sea angling with relevant bodies which include but are not limited to: Government Departments, Fáilte Ireland and Tourism Ireland, Waterways Ireland, National Parks and Wildlife Service, Coillte, Teagasc, Marine Institute, Sea Fisheries Protection Authority, Office of Public Works, Environment Protection Agency, Local Authorities and the ESB.



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Action Measures

Action Measures

The measures through which the strategy will deliver on the strategic objectives are outlined below. These measures will act as a framework for project planning and development over the course of the strategy. IFI now intends to take action on the basis of these measures to deliver on the three strategic objectives.

All of the key findings from the strands of research undertaken as part of this strategy development, were subject to a SWOT analysis. The results of this analysis were used in the formulation of the action measures identified below. Details of the SWOT analysis can be found in Appendix I.

Measures

1. Identify funding for this NSAD and future fisheries development and management
2. Encourage stakeholder engagement and involvement in fisheries development and management
3. Ensure sustainable development of the natural angling resource
4. Ensure protection and conservation of the fisheries resource
5. Set standards for fisheries and related services
6. Market and promote angling domestically and abroad
7. Achieve access to angling for all

A project scoring framework has been developed to support the implementation of the strategy and to link each individual project being progressed under the various measures back to the three strategic objectives. This alignment between measures and objectives is crucial in communicating the rationale for individual projects or groups of activities. Figure 3.1 below illustrates the links between these two elements of the NSAD.

Key Assumptions	Assessment Criteria (Project Prioritisation Framework)	Scoring
<p>1. This framework allows for a measure of ranking project activity. It provides for an objective assessment of each project's potential to meet the strategic objectives creating a link between the strategy and action plan elements of the NSAD.</p> <p>2. All projects are relevant and appropriate for consideration in the NSAD as they have been derived and formulated from research, proven need, policy and regulatory environment, programmatic activity and other key angling aims and needs.</p> <p>3. All projects, especially large capital projects, can be further assessed through Cost Benefit Analysis, Economic Impact Assessment, Environmental Impact Assessment or SEA. Outside of these levels of assessment there can, and should, be a consideration of the value for money, cost / impact, urgency of action and other relevant measures.</p> <p>All projects are subject to compliance with the IFI Environmental Charter</p>	<p>Strategic Objectives / Performance Indicators</p> <p>Each project will be measured against each of the following in terms of its impact potential.</p> <p>SO1: Making Angling Accessible & Attractive through information, infrastructure and support</p> <p>SO2: Tourism Development through the promotion of our angling resource</p> <p>SO3: Recognition of angling as a key Leisure & Recreation pursuit</p>	<p>Each project under the action measures 1 – 7 will be awarded a score against each of the strategic objectives that reflects its potential to impact that strategic objective.</p> <ul style="list-style-type: none"> • Very High Impact = 10 • High Impact = 8 • Medium Impact = 6 • Low Impact = 4 • No Impact = 0 <p>Highest possible project score = 30</p>

Figure 3.1: Project Scoring Framework

Measure 1: Funding

Funding has emerged as a critical priority from a number of perspectives: a) the funding of IFI and stakeholders to undertake development and promotional work and b) the streamlining and simplification of existing and future funding schemes as operated by IFI. Governance requirements are the basis of the controls and checks that are in place to ensure the proper use of public funds and 3rd party funds managed by IFI. It is IFI's objective to make access to, and use of funding streams as transparent as possible.

Sub measures to address the above are

M1.1 Identify/create a specific fisheries fund which can be accessed by IFI and 3rd parties to undertake development works

M1.2 Provide stakeholder workshops and information on the application, allocation and drawdown of funds

M1.3 Adopt an easily accessible online application and award process for funding schemes operated by IFI

Measure 2: Stakeholder Engagement

The inland fisheries and sea angling sector has a wide and diverse range of stakeholders and has increasingly complicated angling perspectives and expectations. It is imperative that improved and more streamlined interaction takes place with stakeholders.

Sub measures to address the above are:

M2.1 IFI apply current best practice regarding stakeholder engagement to ensure appropriate communication and engagement with all angling stakeholders at the appropriate level

M2.2 Angling stakeholders will be invited/encouraged to participate in angling development via the provision of on-line resources by IFI

M2.3 IFI will maximise the use of volunteerism where it is of benefit to angling development



Action Measures

Measure 3: Sustainable development of the natural angling resource.

Sustainable development is a key guiding principle of the strategy. Through this ethos the strategy will support economic development and jobs throughout Ireland while ensuring the angling resource is conserved and developed in a sustainable manner for the benefit of all. All development projects arising from the strategy will be subject to the guidelines contained in the IFI Environmental Charter. Implementation of this measure will be contingent upon the successful progression of measures 1 and 2.

Sub measures to address the above are:

M3.1 The formulation of a database of development projects, prioritised by reference to the strategic objectives on the basis of the project scoring framework above (figure 3.1)

Measure 4: Protection and conservation of the fisheries resource

It has been IFI's objective to work in an intelligence led environment using modern technologies to improve efficiency and effectiveness. However, the input of stakeholders in supporting the protection of inland fisheries to ensure the sustainability of the resource into the future is central to delivering this strategy.

For this to happen efficiently the following measures should be implemented:

M4.1 Ensure the provision, implementation and appropriate review of policies for all key angling species

M4.2 Update of legislation to reflect current policies and practices and also mitigate against current threats

M4.3 Designate nursery areas/no keep areas in inshore areas. Regulatory support for designated catch and release fisheries – e.g. the Waterways Ireland network

M4.4 Increased focus on the protection of all species and their habitat

Measure 5: Standards – fisheries and services

To ascertain what makes a good fishery, IFI has created an 'Angling Product Evaluation Criteria' by which fisheries can be classified. Using these criteria will identify gaps and allow for prioritised and focused development. Minimum standards for many service providers, such as angling guides are not in place, and are a clear requirement in the current marketplace

Sub measures to address the above are:

M5.1 Classification of fisheries against the Angling Product Evaluation Criteria to identify gaps and necessary developments that will provide the fishery with greater potential to attract anglers and economic benefits

M5.1.1 On going evidence based review of the Angling Product Evaluation Criteria

M5.2 The development of a minimum standard for angling guides and ghillies and other angling specific providers that can be promoted on the www.fishinginireland.info website

Measure 6: Marketing and promotion

Marketing and promotion activity will ensure that Ireland's angling product is developed to address customer requirements and thereby deliver on the strategic objectives. This priority action will demonstrate the attractiveness of angling, develop tourism and increase participation in angling for leisure and recreation. IFI has, with its partners, consistently marketed the angling product with the greatest potential to grow angler tourist numbers and economic return. Angling marketing activity is consistent with the current Department of Transport Tourism and Sport's policy – People, Place and Policy, Growing Tourism to 2025.

Sub measures to address the above are:

M6.1 Ensure the consistent provision of up to date angling marketing information and analysis

M6.2 Maintain and build on relationships with the tourism agencies and other agencies with angling promotion remits through MOUs and partnerships

M6.3 Develop a mechanism which enables angling stakeholders to participate in promotional activity

M6.4 Further develop of the www.fishinginireland.info website for licence and permit sales and distribution

Measure 7: Access to angling for all

Access issues in the context of inland fisheries refers to; a) physical access to fisheries, b) ownership issues and c) barriers to starting angling. These issues individually and in combination can impinge on the potential of angling to maximise economic, tourism, health and recreational benefits. IFI's vision to provide an accessible and sustainable, world class, inland fisheries and sea angling resource for all is dependent upon removing such barriers and supporting angling participation

The sub measures required to address access issues are:

M7.1 Develop and implement a policy on state fisheries that ensures the consistent management and access to state fisheries for all

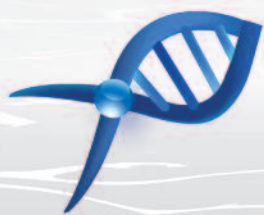
M7.2 Update legislation to make provision for the investigation of ownership and title to fisheries

M7.3 Bring 'the angling to the people' – the provision of designated stocked beginner fisheries, coaching and angling hub support and novice angler projects

3

Action Measures





National Strategy
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Delivering the National Strategy for Angling Development

Implementation of the NSAD

Angling is uniquely placed to deliver benefits across the economically challenged areas of the country because of its comprehensive geographic and seasonal coverage. Implementation of the strategy will ensure that those areas with the greatest potential to positively deliver the strategic angling development objectives are prioritised for development. Similarly, areas which need improvement to ensure that they continue to contribute to economic development will also be identified and prioritised.

The identification of, and access to, funding streams to facilitate the implementation of the strategy is now critical. Supporting documentation to this strategy provides economic information, gaps in provision of product and services, angling product evaluation criteria and potential markets to ensure efficient implementation. A register and project scoring framework have been developed in order to identify and prioritise projects for implementation.

Following publication of this strategy, the Board of IFI will establish the National Angling Development Strategy Implementation Group composed of an executive group of IFI staff with direct Board oversight. The implementation group will oversee the roll out of the measures outlined in this document. The initial priorities will be to identify and source funding and inform and engage stakeholders in the process.

Once the implementation group is in place, it will begin work on a plan to deliver on the objectives of the strategy. The project register will open for project registration. Submissions received as part of the public consultation will be further examined to identify projects for inclusion in the register.

It is envisaged that, contingent upon funding and compliance with the requirements as set out in the Environmental Charter, work on physical projects will commence in early 2016, while desk based projects will commence once resources are in place.



National Strategy for Angling Development

Delivering the National Strategy for Angling Development

Step 1 – 2010 Inland Fisheries Ireland is established and produced Corporate Strategy

Key Objectives: To develop the potential of the inland fisheries sector, by increasing the number of resident and tourist anglers, empowering stakeholders and generating a better return for Ireland.

Step 2 – 2013 Socio-Economic Study of Recreational Angling in Ireland is published.

Findings: Value of Angling - €755 million supporting 10,000 jobs.

Angling, as a recreational pursuit, is a major contributor to the fabric of Irish life in all parts of the country, particularly in rural and peripheral areas. Key areas identified are the strategic development and marketing of our angling product and a continued strong focus on the protection and conservation of the resource into the future. These actions will sustain and grow the benefits to anglers, angling businesses and the Irish economy.

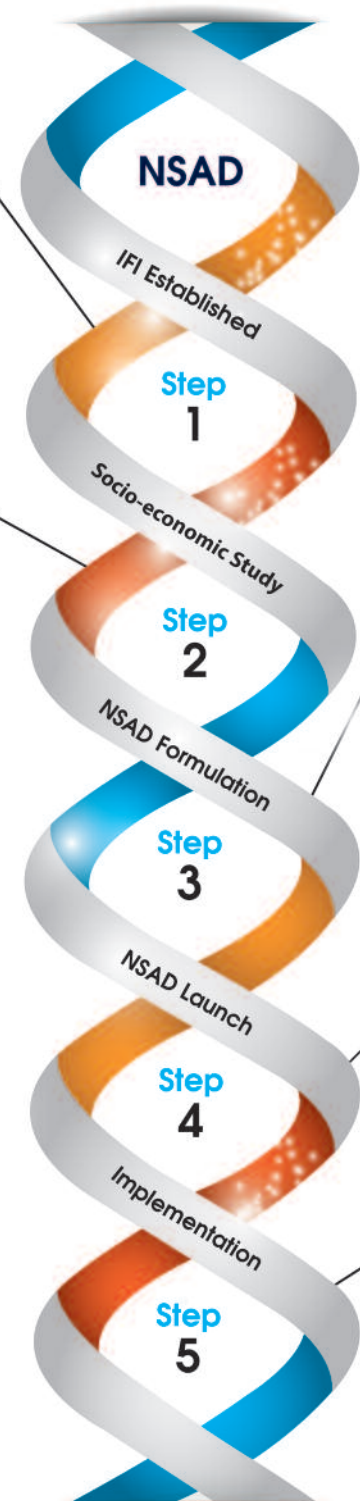


Figure 4.1 NSAD Pathway



Delivering the National Strategy for Angling Development

Step 3 – 2014/2015 NSAD formulation.

The Board of IFI undertakes a series of stakeholder meetings

The preparation of the NSAD is prioritised and a project team assigned to address the following:

- Economic Analysis
- Angling Product Evaluation Criteria
- Market Research
- Current Product Evaluation
- Project Register Formulation

A public consultation is undertaken in February/March 2015
Screening for Strategic Environmental Assessment and
Appropriate Assessment is undertaken.

Step 4 – National Strategy for Angling Development is launched

Step 5 – Implementation

The Board of IFI will establish the National Angling Development Strategy Implementation Group composed of an executive group of IFI staff with direct Board oversight. The implementation group will oversee the roll out of the measures outlined in this document. The initial priorities will be to identify and source funding and inform and engage stakeholders in the process.



National Strategy
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5

Assessment & Analysis – Valuing our Angling Resource

Assessment & Analysis – Valuing our Angling Resource

The extraordinary beauty, the clean, green environment and the Irish welcome combine together to enhance the angling experience in Ireland. As Ireland is at a natural meeting point between the colder waters coming from the north and warmer waters from the south, it is fortunate to have a good mix of warm and cold water fish species. When blended with other key visitor experiences, Ireland has an enduring appeal within the world of angling.





NATURAL ASSETS	HUMAN CAPITAL
<ul style="list-style-type: none"> • Green and natural environment • Favourable climate • Good water quality • Freshwater and marine resource • Diverse species of high quality 	<ul style="list-style-type: none"> • Angling community • IFI - experienced and professional staff • Partner agencies 
ANGLING INFRASTRUCTURE	MARKETING AND PROMOTION
<ul style="list-style-type: none"> • Protection, conservation and development of angling resource • Access to waterways • IFI, other state and privately owned fisheries • Angling industry - support services 	<ul style="list-style-type: none"> • 'Angling Ireland' brand and promotional activity • Local angling destination management • Tourism Ireland and Fáilte Ireland product development and promotion • Online angling resources, angling media, angling forums 

Figure 5.1 Key assets of the Irish angling resource

Contribution of Angling Activity (Economic Impact)

The economic contribution of angling to Ireland stands at over €836m per annum and is estimated to support in excess of 11,350 jobs. Over 446,600 individuals participated in recreational angling in Ireland during 2014 of which over 273,000 live in Ireland (Source: Economic Analysis link provided in Appendix I).

The overall proportion of visitors engaging in angling has remained at approximately 2% over the last decade (Fáilte Ireland 2013). Updated economic analysis indicates that overseas visitors numbered 132,000 in 2014 with a further 41,000 from Northern Ireland. Visiting anglers from Britain accounted for approximately one third of our overseas anglers, while 59% came from Mainland Europe with Germany being the single largest Continental market (24%) (Fáilte Ireland 2014).

Table 5.1: International visitors to Ireland participating in Angling 2003 – 2014 (000's)

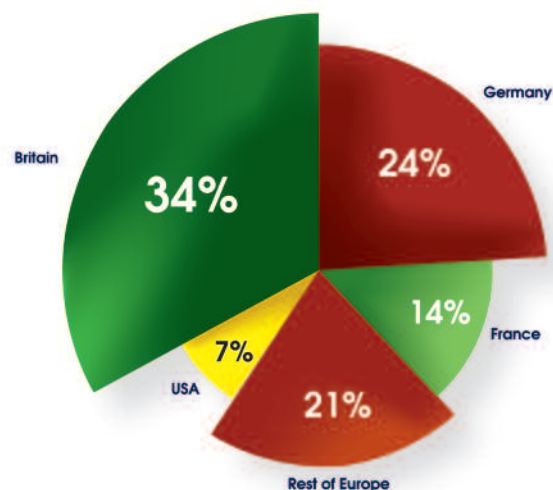


Figure 5.2 Overseas angling markets by percentage share 2013

Stay & Spend Key Facts

- Average length of angling stay is 11 nights which is 25% longer than average overseas visitor stay;
- Higher spend per day and by trip – average angler spend is €1,027 per trip compared with €832;
- Higher impact on rural and peripheral economies and on B&B and private rented accommodation sectors;
- The Western and South-western regions particularly benefit from overseas angling tourism.



Assessment & Analysis – *Valuing our Angling Resource*

Angling tourism is a source of significant expenditure and employment support in many rural, urban and peripheral areas across the country. This expenditure relates to accommodation, food and drink, fishing tackle, angling fees, car hire and a host of other trip expenses.

In summary, recreational angling in Ireland provides significant economic benefits to rural and peripheral regions whose natural angling resources attract both domestic and overseas angling participants. In many cases these rural areas may be lacking in alternative tourist attractions and, in their absence, angling provides the focus for an important and sustainable source of income for both the catering and accommodation service providers in these communities.

Recreational angling also attracts anglers at times outside of the main tourist seasons; the 'shoulder periods' of March through to May and again from mid-August through to October provide some of the best angling opportunities in Ireland and, as a consequence of this, they are the most popular angling months. These shoulder periods 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.

Growth Estimates

In 1999, an estimated 173,000 overseas visitors to Ireland participated in angling (Fáilte Ireland); by 2003 this figure had dropped to approximately 88,000 and since then the numbers of overseas anglers travelling to Ireland each year have never fully recovered to 1999 levels. In recent years, however, there has been evidence to suggest an increase in both overseas and domestic angler participation.

An essential aim of the strategy is to further increase the numbers of both domestic and overseas anglers who regularly participate in angling in Ireland. Should future overseas participation figures reach the historical figures estimated for the year 1999, the increase in associated net expenditure would approach €41 million annually and support an extra 1,400 Irish jobs.

Furthermore, an increase in domestic angler participation of 0.5% would increase combined domestic and overseas tourism related direct expenditure to €53 million and support 1,800 jobs.



National Strategy
for **Angling** Development





Appendix 1- Strategy Development Process

Strategy Development Process

IFI is currently at Step 3 in the NSAD process as portrayed in Figure 4.1. The documents which explain the work undertaken in preparation for the strategy are available for download from www.fisheriesireland.ie/nsad.

Economic Analysis

1. The Economic Contribution of Coarse Angling in Ireland
2. The Economic Contribution of Trout Angling in Ireland
3. The Economic Contribution of Pike Angling in Ireland
4. The Economic Contribution of Sea and Bass Angling in Ireland
5. The Economic Contribution of Salmon and Sea Trout Angling in Ireland
6. Growth Estimates

Development Need Identification

1. Angling Product Evaluation Criteria
2. Market Research
3. Current Product Evaluation
4. Project Register

The economic analysis documents provide the economic argument for developing the angling resource. The market research, product evaluation and evaluation criteria were designed to identify the development needs of the angling product that can be addressed over the period of the strategy. The project register is the application of the NSAD framework to identify, register and prioritise angling development projects.

The scoring systems applied to each of the angling products and the outcome of the assessments undertaken is included in the following reports.

Scoring System for Salmon Angling Product
Assessment of Salmon Angling Product
Scoring System for Sea Trout Angling Product
Assessment of Sea Trout Product
Scoring System for Brown Trout (Lake) Angling Product
Assessment of Brown Trout (Lake) Angling Product
Scoring System for Brown Trout (River) Angling Product
Assessment of Brown Trout (River) Angling Product
Scoring System for Pike Angling Product
Assessment of Pike Angling Product
Scoring System for Coarse Angling Product
Assessment of Coarse Angling Product
Scoring System for Sea (Shore) Angling Product
Assessment of Sea (Shore) Angling Product
Scoring System for Sea (Boat) Angling Product
Assessment of Sea (Boat) Angling Product
Scoring System for Sea (Bass) Angling Product
Assessment of Sea (Bass) Angling Product



The angling sector has a wide and diverse range of stakeholders and has increasingly complicated angling perspectives and expectations. In the formulation of the NSAD, IFI engaged extensively with its stakeholders through the National Inland Fisheries Forum (NIFF), angling representative organisations, public consultation, meetings, outreach programmes, traditional media and online via its website and social media. Some of the key themes to emerge are represented in the graphic below.

Stakeholder Issues Tag cloud

- Female-Anglers
- Regulate-Boat-Movement
- Match-Funding Youth
- Lough-Derg-Promotion Angling
- Fish Policy
- Water-Quality
- Permissions
- Penalty-Points Lough-Corrib
- Social Media
- Invasive-Species
- Inter-Agency-Working
- Fund-Application-Process
- Legislation
- Funds-for-IFI
- Angler-Contribution Grey-Mullet-Conservation
- Angler-Database
- Fishery-title Bag-Limit
- Protection Coaching Sea-Lice Salmon-Quota
- Disabled-Angling Fish
- Catch-Photo-Release
- Stocking-Policy Clare-River
- Stakeholder-Engagement Access
- Salmon-Farms ID-Card Stricter-Governance Bio-Security Funding-Scheme
- Protection-for-Trout Public-Awareness-Raising Barriers Better-Protection
- Commercial-Draft-Net-Season Better-Promotion
- Water-Quality-Monitoring Bag-Limits Pike-Policy-Review
- Protection Scientific-Surveys Coarse-Angling
- Lough-Muckno Predation

Public Consultation

- ## SWOT Analysis

The SWOT Analysis is set out overleaf.



Appendix 1- *Strategy Development Process*





National Strategy for Angling Development

STRENGTHS

Factor	Solution / Action
<ul style="list-style-type: none"> • State Agency with responsibility for Conservation Development and Promotion of the resource, trained staff and some policy. • Strategic partnering with other agencies in Ireland and Northern Ireland re marketing • Applied Economic Research Programme in place • Applied Scientific Research division in place • Criteria for evaluation of fisheries in place • Empowerment Ethos • Excellent wild fisheries • Economic impact of Angling 	<ul style="list-style-type: none"> • IFI to prioritise staff and resources to ensure its remit is fulfilled to maintain and grow the value of angling through promotion, development and conservation with all stakeholders (measures 1 - 7) • Memorandums of Understanding to be in place to ensure stability and joined up approach to project or programmatic activity (measures 1, 2 & 6) • Funding NSAD to continue the development of angling in Ireland (measure 1)

WEAKNESSES

Factor	Solution / Action
<ul style="list-style-type: none"> • Funding and staffing for angling development works and on-going maintenance • Inconsistent management of state owned fisheries by various agencies • Incomplete knowledge of fisheries ownership • Outdated legislation and confusing legislation • Incomplete inventory of angling infrastructure • Applied scientific research for some species lacking • Angling related tourist data lacking for some markets • Angling Stakeholder Engagement 	<ul style="list-style-type: none"> • Legislation and further policy development and updating of same (measures 3, 4, 6 & 7) • State fisheries Management policy to be formulated and implemented (measures 3, 4, 5 & 7) • The National Strategy for Angling Development to support funding from exchequer and 3rd party fund creation. (measures 1 - 7) • Angling infrastructure projects (measures 4, 5, 6 & 7) • Prioritisation of applied scientific and economic research to address information gaps (measures 3, 4 & 6) • Acknowledgement of angler stakeholder issues and plan to address expectations and potential (measures 1 - 7)



Appendix 1 - Strategy Development Process

OPPORTUNITIES	
Factor	Solution / Action
<ul style="list-style-type: none">• Employment maintenance and creation through angling product maintenance and development• Opportunity for skills development and enhancement• Tourism Policy and Recreation focus in Ireland• Business opportunities identified• Free fishing – predominately• Better engagement of stakeholder• Climate Change• High interest and participation in Ireland• Markets identified with development potential	<ul style="list-style-type: none">• Identification of development opportunities in rural and peripheral communities (measures 1 - 7)• Engage with potential anglers through provision of novice angler initiatives (measures 6 & 7)• Support the provision of services where gaps have been identified (measures 1 - 7)• Horizon scanning for new product potential (measure 6)• Provision of workshops to empower stakeholders (measures 1 - 7)

THREATS	
Factor	Solution / Action
<ul style="list-style-type: none">• Competition of other destinations• Angling stakeholders difficulty with governance and legislative requirements• Lack of political and public awareness of the value of the resource• Climate Change• Angler demographics• Reduction of fish stocks due to illegal activity• Water quality issues• Angler Politics• Lack of Key Operators• Invasive species	<ul style="list-style-type: none">• Implementation of the NSAD to ensure quality angling product and effective marketing strategy (measures 1 - 7)• Education and outreach programmes and 'bring angling to the people' to ensure anglers engaged into the future (measures 4, 5, 6 & 7)• Legislation & policy improvement to protect the angling resource (measures 2, 3 & 4)• Stakeholder engagement and simplification of processes regarding development projects (measures 1, 2, 3, 7)• Support to operators to address gaps identified (measures 5, 6, & 7)• Appropriate legislation and resource to manage invasive species (measures 3 & 4)

Strategic Environmental Assessment Screening Report of the National Strategy for Angling Development

In accordance with Article 13(1)(b) of the European Communities (Environmental Assessment of Certain Plans and Programmes) Regulations 2004 as amended by the European Communities (Environmental Assessment of Certain Plans and Programmes) (Amendment) Regulations 2011, Inland Fisheries Ireland has prepared:

- A **National Strategy for Angling Development**;
- **Associated Strategic Environmental Assessment (SEA) Screening** of the likely significant effects on the environment of implementing the Strategy, in accordance with Directive 2001/42/EC of the European Parliament and Council of 27 June 2001 on the assessment of the effects of certain plans and programmes on the environment as transposed into Irish law by the European Communities (Environmental Assessment of Certain Plans and Programmes) Regulations 2004 as amended; and
- **Associated Habitats Directive Screening Statement for Appropriate Assessment (AA)**, pursuant to Article 6 of Council Directive 92/43/EEC of 21 May 1992 on the conservation of natural habitats and of wild fauna and flora as transposed into Irish law by the European Communities (Birds and Natural Habitats) Regulations 2011.

A copy of the Strategy, associated SEA Environmental Report and associated AA are available for public inspection and submission within the time frame outlined in <http://www.fisheriesireland.ie/NSAD>. The conclusions of both documents are outlined below.



Minogue and Associates
www.minogueandassociates.com



Minogue & Associates and Doherty Environmental have been appointed by Inland Fisheries Ireland to undertake a Strategic Environmental Assessment (SEA) Screening and a Screening for Appropriate Assessment (AA) of the National Strategy for Angling Development. Conclusions from both assessments are outlined below. Both the Screening for SEA and Habitats Directive Assessment (HDA) Screening are available from the IFI website and should be read in combination with the Strategy and its supporting documents.



Appendix 2- Screening for SEA and AA

Conclusion to SEA Screening Assessment

Section 9 (1) of the (2004) Regulations (S.I. No. 435) states *"subject to sub-article (2), an environmental assessment shall be carried out for all plans and programmes*

*(a) which are prepared for agriculture, forestry, **fisheries**, energy, industry, transport, waste management, water management, telecommunications and tourism, and which set the framework for future development consent of projects listed in Annexes I and II to the Environmental Impact Assessment Directive, or*

(b) which are not directly connected with or necessary to the management of a European site but, either individually or in combination with other plans, are likely to have a significant effect on any such site."

(2) A plan or programme referred to in sub-article (1) which determines the use of a small area at local level or a minor modification to a plan or programme referred to in sub-article (1) shall require an environmental assessment only where the competent authority determines that it is likely to have significant effects on the environment and, for this purpose, the competent authority shall make any necessary determination

(3) A competent authority shall determine whether plans and programmes other than those referred to in sub-article (1), which set the framework for future development consent of projects, are likely to have significant effects on the environment.

(4) A competent authority shall, in determining on a case-by-case basis under sub-article (2) or (3) whether a plan or programme, or modification to a plan or programme, would or would not be likely to have significant effects on the environment, take account of relevant criteria set out in Schedule 1 and any submission or observation received in response to a notice under sub-article (5).

The NSAD is the first comprehensive national framework for the development of the angling resource. The strategy aims to deliver a wide-ranging set of investments, innovations and promotions over the coming five years. The strategy seeks to maintain, enhance, develop and promote fisheries to ensure that they meet angler expectations and provide a resilient, sustainable product. It is a statement of intent that aims to deliver improved angling whilst conserving and protecting the resources that support the angling product.

Many of the action measures relate to engagement, marketing and conservation though it must be noted that some physical projects such as enhancing angling access may give rise to effects on the environment in the absence of environmental assessment and safeguards. With this in mind, IFI has developed two key elements that will in the first instance assess any proposal against the Project Scoring Framework, and the application of the tailored Environmental Charter developed for the NSAD. At this point action measures and sub-measures to deliver these have been developed and should funding be achieved, each project proposal both physical and non physical would be assessed against the Project Scoring Framework before being prioritised.

In summary, the NSAD does not set the framework for future development consent of projects listed in the EIA Directive in Annex I and II. In this regard, they will not be placing limits on activities or development, influence location, nature, size or operating conditions nor will they dictate or specifically direct the allocation of resources at this juncture. Therefore, on the basis of the above assessment and consideration of the criteria as set out in Schedule 2a of the Regulations 2011 (as amended) it is considered the NSAD is unlikely to give rise to significant environmental effects and does not require full SEA. A final determination however will not be made until the specified environmental authorities have been consulted and feedback received.

Habitats Directive Screening Statement for Appropriate Assessment

Screening Conclusion

As part of this Screening Assessment the NSAD was examined for its potential to result in land use activities which could have implications for European Sites and water-dependent habitats and species for which European Sites are designated.

The land use activities identified within the NSAD are outlined in Section 3: NSAD Action Measures. Each of the strategies seeking to implement the action measures have been assessed for their potential to result in likely significant effects. Many of these have been identified as having a positive effect on the future conservation status of water-dependent habitats and species.

A number of these strategies however, will, in the absence of safeguards, have the potential to result in negative pressures to these receptors. These pressures relate to strategies that aim to promote angling as a leisure and tourism resource. However, the NSAD has been established with the aim of not only promoting angling as a recreational and tourism resource but also as a high-level strategy for the future conservation of fisheries. This approach has led to the inclusion of a range of safeguards, such as the environmental charter, whose implementation will ensure that the NSAD will not have the potential to result in likely significant effects to European Sites.