



Agenda item 4.1
For information

Council

CNL(19)42

Update on socio-economic issues from UK (England and Wales)

(Tabled by European Union – UK (England and Wales))

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NASCO Annual Meeting 2019 – Update on socio-economic issues from UK (England and Wales)

A review of the economic value of angling in Welsh rivers

Natural Resources Wales (NRW) recently commissioned a review of the economic value of angling in Welsh rivers; the report was published in July 2018. This focusses on salmonid fisheries, principally those for salmon and sea trout, and their value to fishery owners, anglers, key stakeholders, as well as the people of Wales more widely, including angling's significance for the economy. The review did not extend to the value of net fisheries or those values of the fish themselves that are unrelated to fishing. The report outlines the legal requirements for information on the economic values associated with river fisheries.

Much of the fishing on rivers in Wales is controlled by Welsh angling clubs. The capital value of river fisheries to their owners is reflected by the market value of fishing rights. The best indicator of the value of fishing rights on rivers where people fish for salmon and sea trout is the average 5-year catch of salmon (it is not possible to disaggregate between salmon and sea trout). The values of fishing for other types of fish are subsumed within this. For rivers without a salmon catch, value is estimated from the length of river and a price per metre, though there will be wide variation in this, reflecting other variables. Key findings:

- **Market value to fishery owners, updated to 2016 prices:** salmon and sea trout fishing £30m; non-migratory trout river fisheries £60m and all river fisheries £90m
- **Value of river fishing to Welsh anglers:** based on historical studies, the net value of all river fishing in Wales to Welsh anglers is estimated as £3 million annually, capitalised at £30 million. This suggests that half of Welsh anglers would be willing to pay an additional £30 or more a year; this may be an underestimate.
- **Significance to the economy, 2016 figures:** Angler's expenditure for salmon and sea trout £10m; household income Gross Value Added (GVA) £5m and 200 Full-Time Equivalent jobs (FTEs). Corresponding values for all angling in Welsh rivers are: £20m GVA and 700 FTEs. Angling activity for salmon and sea trout is estimated to have fallen by 28 percent since 2005, with little overall change for other types of fishing during this period. The scale of economic activity supported is similar to an estimate made for leisure activities associated with the Wales Coastal Path.
- **Visitors to Wales** contribute much of the expenditure associated with fishing on rivers that supports income and employment within Wales. In 2005, about a third of all days fished were by visitors (no more recent data available).

For a copy of the full report visit: <https://cdn.naturalresources.wales/media/686544/economic-value-angling-wales-report.pdf?mode=pad&rnd=131800996920000000>