



Council

CNL(20)45

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 2020 – Update on Socio-Economic Issues from UK (England and Wales)

1. Public consultation on proposals for national salmon byelaws and associated measures, 2018

The Environment Agency (EA) conducted a national consultation in 2018 on proposals for national salmon byelaws and associated measures. As well as other aspects, this consultation sought to understand the range of socio and economic effects that the different options for net and rod fisheries would have.

For net fisheries these questions focused on:

- the consequences of not be able to fish for salmon or sea trout;
- opportunities to fish for other species; and
- viability of continuing to fish for sea trout with release of all salmon.

For rod fisheries these questions focused on:

- which options (if any) would cause you to stop fishing?
- if you would consider moving to a river with lower levels of required catch and release?
and
- the impact of the options on owners/lessees of salmon rod fisheries.

The responses to this consultation, as well as information from conversations with net and rod fisheries during the development of the options, were used to understand their impact during the approval process of the proposed Byelaws, and to provide an assessment of the benefits and impacts of the proposed regulations in the Technical Case that supported the advertising of the proposed Byelaws.

To support the confirmation of the proposed Byelaws the EA commissioned Amec Foster Wheeler over the winter of 2017/18 to investigate the total societal impacts of the proposed Byelaws and associated measures and monetise these impacts where possible. Table A from the Amec Foster Wheeler report is reproduced here. However, the whole report cannot be published due to Data Protection reasons as it contains financial information that could be directly attributed to individuals.

Table A. Estimated effects resulting from the introduction of measures currently proposed by the Environment Agency to reduce salmon decline from net and rod fishing (source: Amec Foster Wheeler - Economic Impact of Salmon Fishing Measures April 2018).

Type of effect	Effect from changes to rod and line angling	Effect from changes to net fishing	Overall effect
Personal enjoyment of fishing/angling	For anglers ceasing fishing, the effect is partially captured as change in Direct Expenditure (see below). For anglers continuing, effects are difficult to estimate but may be close to zero (for example, if they already practice C&R consistent with the proposed measures).	The effects on net fishermen are of the same type as on recreational anglers. The aggregate effects will be smaller as there are fewer net fishermen.	A reduction which is not quantified. The effects fall only on some recreational anglers and fishermen.
Value of fish caught	Not estimated but known to be small compared to both anglers' direct financial expenditure and ranges for assumptions in forecasts made here.	Reduction of about £1.38m of annual gross income, mainly from closure of drift net fisheries in the North East.	A reduction of £1.38m of annual gross income for net fishermen. Minor impact on rod anglers (using their current cost as a comparator) which is not quantified.
Direct expenditure by anglers and net fishermen	Reduction in aggregate expenditure of between £0.8m and £6.5m nationally (compared to a current total of £31.7m).	Reduction in expenditure which is uncertain but likely to be less than reduction in gross income. Conservatively assessed as equal to loss in gross income (£1.38m).	Total reduction of between £2.2m and £7.9m.
Wider economic impacts	Changes in expenditure imply a loss of FTE jobs of between 11 and 90 and a range in loss of Gross Value Added (GVA) of between £0.7m and £5.5m.	Difficult to estimate and distinguish from direct losses at fisheries but, assuming expenditure has the same effects as for angling, would lead to a loss of 21 FTE jobs and a loss in GVA of £1.18m.	Total reduction of between 32 and 111 FTE jobs, and between £1.9m and £6.7m in GVA.
Social and cultural value of fishing	Uncertain.	Uncertain.	Likely to be perceived as negative by fishermen, particularly in coastal areas with traditional fishing practices. Not considered as an effect on the wider community but potentially linked to environmental benefits (see below). Not estimated or considered further.
Environmental benefits	The benefits of the measures in terms of fish saved are difficult to link to a clear metric for environmental benefits. The proposed measures will contribute to the preservation of salmon stocks, but are not the only factor in maintaining these stocks. Estimates of the total value of these stocks is £453m based on willingness to pay estimates for the general public (all households). This provides an upper comparator for the value of maintaining stocks.		

For a copy of the full consultation report visit: <https://consult.environment-agency.gov.uk/fisheries/proposed-national-salmon-byelaws/results/statementtosupportsstpb2018.pdf>

2. A survey of freshwater angling in England: phases 1 and 2

This study examined the spending patterns and behaviour of 10,000 surveyed fishing license holders to build a picture of the market value of freshwater angling in England. Note that this study was targeted on all angling in freshwater and therefore included not only salmon but trout and coarse fish species.

The project showed that freshwater angling contributed £1.46 billion to the economy and supported 27,000 full-time equivalent jobs in 2015. The study also estimated the values associated with changes in quality of a fishing site showing, for example, that anglers place greatest value on a shift from low to medium fish abundance.

The project provides essential information for future management of fisheries and recognition of freshwater fisheries as part of our Natural Capital.

Phase 1 studied angling activity, expenditure and economic impact, and the key findings were as follows (those specific to salmon highlighted in bold):

- a total of 22.5 million days were spent freshwater angling in England in 2015;
- freshwater angling in England in 2015 contributed £1.46 billion to the economy (expressed as gross value added) and supported 27,000 full-time equivalent jobs;
- angling for coarse fish (as opposed to salmonids such as salmon and trout) was the most popular (19.4 million days spent in 2015);
- carp were the most popular individual species, accounting for 7.4 million angling days in 2015;
- across all types of angling, almost 70% of all angling days in 2015 were on lakes, ponds, reservoirs;
- anglers each spent an average of over £400 on tackle and around £110 on club or syndicate fees in 2015;
- fuel and bait accounted for the bulk of expenditure on specific trips;
- **salmon anglers tended to spend more on annual memberships and accommodation than other types of anglers;**
- most coarse angling trips took place between 5 and 25 miles from the angler's home;
- **anglers travelled significantly further for game fishing, with most salmon anglers travelling at least 50 miles from home to fish;** and
- geographical patterns of angling activity tended to reflect the numbers of anglers living in the respective river basin districts. Visiting anglers, however, made significant economic contributions in the Northumbria, the English part of the Severn and South West river basin districts (RBDs).

Phase 2 studied non-market values associated with angling and estimated the values associated with changes in quality of a fishing site. Noting that the study was generalist and not therefore focusing on salmon. However, the study found that improving the quality of fishing sites as measured by 3 key attributes (fish abundance, fish size and fish diversity) is predicted to lead to an increase in the number of trips made to the site, both from anglers switching away from existing alternative sites and making new or additional visits.

The summary and full length reports for phases 1 and 2 were published in 2018 and are available via this link: <https://www.gov.uk/government/publications/a-survey-of-freshwater-angling-in-england>