

Public Attitudes to Angling 2005

A survey of attitudes and participation in England & Wales

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Executive Summary

1. Objectives

The survey was designed to:

- Assess the public's attitude toward angling, including young people as determined by the reaction to a number of statements about angling;
- Assess the levels of participation in freshwater and sea angling;
- Explore the interest amongst non-anglers of participating in the sport at some future date;
- Determine the factors that would encourage potential anglers, especially youngsters to take up the sport; and
- Compare results with those from previous surveys in 1997 and 2001.

Survey method

- The data were collected by means of face to face interviews amongst representative samples of adults within England and Wales aged 15yrs+ and young people aged 12-16yrs.
- 2258 people were interviewed, of which 419 were aged 12-16yrs.
- The survey and data analysis were designed to provide results representative of the population in terms of gender, age, social grade and region.

In the following section the equivalent findings for 2001 and 1997 are presented in brackets. 2001 data is presented in the first bracket and 1997 data in the second.

Attitudes to angling

- In 2005, most people still view angling positively: 71% (73%) (75%) agreed with the statement that 'Angling is an acceptable pastime', while only 8% (10%) (12%) disagreed. In 2005 the results were less polarised than in 2001.
- The largest proportion of people, 66% (64%) (70%) still believed that "Angling activity suggests that the water quality of the river or lake is good". Only 8% (12%) (11%) disagreed with this statement. Again the results were less polarised than in 2001.
- 53% (46%) (54%) agreed with the statement that 'Anglers care for the environment'; 14%(18%) (18%) disagreed. Attitudes toward this statement are significantly more positive than in 2001, however they show a return to the level of agreement recorded in the 1997 study.
- 58% (54%) (58%) agreed with the statement that 'Angling fits in well with other activities such as walking and cycling'; 16% (23%) (25%) disagreed. Attitudes toward this statement are significantly more positive than in 2001.
- There was less certainty about whether 'Angling is a cruel pastime'. 24% (24%) (27%) agreed, while 47% (52%) (52%) disagreed and 26% (24%) (18%) neither agreed nor disagreed.
- Young people (12-16 year olds) are also still positive about angling in general, though likely to be less positive than adults and less positive than in 2001. Perhaps as a function of age and knowledge young people are less clear in their views than the population as a whole and this uncertainty has increased since 2001.
- With regard to ethnic origin, the white sub group were generally more positive than the Asian or Afro-Caribbean sub samples, whilst the latter had less clear views and often neither agreed nor disagreed, perhaps reflecting a reduced knowledge of angling.

Overall participation in angling

- 13% of the population over 12 said they had been fishing (freshwater and/or sea) in the last 2 years (5.8 million people).
- 9% of the population over 12 (4.2 million people) had been fishing (freshwater and/or sea) in the last year.

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Public Attitudes to Angling 2005

Participation and interest in freshwater angling

- The level of interest in freshwater angling remains high, although participation levels have not increased.
- 8 million people, 18% (17%) of the population (12+ years) were either **current anglers**, 8% (9%), 3.5 million, having been freshwater fishing in the last two years, or **potential anglers**, 10% (8%), 4.4 million, were interested in going fishing in the future although they had not fished in the last 2 years.
- Amongst teenagers aged 12 to 16, the proportions were even greater: 19% (21%) had been freshwater fishing in the last two years, and another 20% (15%) were interested in going fishing in future. Therefore, in this age band, 39% (36%) had an interest in freshwater fishing. Despite the level of interest the proportion of the total sample who had never been fishing had increased from 62% to 69% since 2001.
- Of the 44 million people in England and Wales over 12,
 - 20% (20%), 8.8 million, had been freshwater fishing in the last 10 years;
 - 8% (9%), 3.5 million in the last 2 years; and
 - 6%, 2.6 million in the last year.
- Since results were of the same order in 1997, 2001 and 2005, these estimates point to high rates of loss and recruitment in angling. Of those who had been fishing in the past ten years but not in the last two years, only 34% (about 1.7 m) were interested in going again.
- The number of people who said they had been freshwater fishing in the last year is greatly in excess of the million who bought a licence in 2004/5.
- Possible reasons for the discrepancy include:
 - (i) high evasion levels amongst anglers who fish infrequently; and
 - (ii) 'going fishing' might mean accompanying an angler rather than personally fishing.
- Current anglers are predominantly male (75%), with a relatively high proportion of anglers aged 15-24yrs, compared to the total sample profile. The current angler profile does however comprise a greater proportion of females, 12-24yr olds and ABs than the profile of rod licence holders recorded in 2001. This may relate to the reasons set out in the bullet point above. The profile of potential anglers is broadly in line with the profile of current anglers.
- 94% of the current anglers were white, whilst 3% were Asian and 0% were Afro-Caribbean. The current anglers comprised a higher proportion of white anglers than the total sample and fewer Afro-Caribbeans. (Total sample 89% white, 4% Asian, 2% Afro-Caribbean.)
- Within **potential anglers** (4.4 million) there are two groups: 40% are **lapsed anglers** (have been fishing in the last 10 years but not the last two years) and the remaining 60% are **new anglers** (have not been freshwater fishing before).
- People who were not current anglers but had expressed some interest in going fishing were asked **what factors would encourage them to go fishing**. The key factors mentioned are:

Factor mentioned	Lapsed anglers (all ages)	Lapsed anglers (12-16 years)	New anglers (all ages)	New anglers (12-16 years)
Having someone to go with	34% ¹ (33 % ¹)	55% ¹ (48 % ¹)	40% ¹ (38 % ¹)	48% ¹ (39 % ¹)
Knowing places to fish close to home	21% ³ (23 % ²)	39% ² (27 % ²)	13% (15 %)	21% (29 % ³)
If it were easier to use local ponds, lakes	19% (16%)	21% (6%)	13% (10%)	20% (16%)
More fish in rivers or lakes	9% (19 % ³)	25% (19 % ³)	6% (5 %)	16% (11 %)
If more people were involved in fishing and knew more about it	11% (7%)	28% (15%)	8% (7%)	18% (19%)

Better facilities (toilets, snack bars etc)	13% (16%)	26% (8%)	7% (5%)	17% (18%)
Being able to borrow or hire tackle	11% (18 %)	8% (8 %)	10% (15 %)	17% (13 %)
Places to fish and take children	21% ³ (18 %)	16% (5 %)	18% ³ (20 % ²)	12% (13 %)
Paying less in licence fees	26% ² (17 %)	34% ³ (14 %)	10% (10 %)	24% ³ (12 %)
Information on how to fish	*	*	19% ² (19 % ³)	33% ² (31 % ²)

*Not included in list of possible answers

The numbers in superscript indicate the order of importance.

- Having local places to fish and also where you can take children were still important.
- For potential new anglers, information on how to fish is crucial.
- Reduced licence fees have increased in importance especially for 12-16 year olds. Note that the price of a junior rod licence has been halved since the 2001 survey so this may relate to permits rather than rod licences.
- The primary factor, as before, is 'having someone to go with'. In 2005, those who gave this reason were asked which of three statements best described why they would like someone to go with. The social side of fishing is emphasised and, for new anglers, so is having someone to show them how to fish. This again highlights the need to instruct new anglers.

	Lapsed anglers (all ages)	Lapsed anglers (12-16 years)	New anglers (all ages)	New anglers (12-16 years)
For company	71%	60%	45%	41%
Because you need someone to show you how to fish	22%	27%	44%	39%
Because you need someone to take you there	7%	13%	9%	20%

Sea angling participation

- 7% of the population over 12 said they had been sea fishing in the last 2 years.
- 4.6% of the population over 12 said they had been sea fishing in the last year (2 million people). This compares to the Drew Associates (2004) estimate of 1.5 million for all ages in 2003.
- Of the 2.6 million people who had been freshwater fishing in the past year, 18% (half a million) had also been sea fishing in the past year.
- 1.5 million people had been sea fishing in the past year but not freshwater fishing.

- The ratio of rod licence holders to those who say they have been freshwater fishing in the past year is 2:5.
- If similar ratios could be obtained for a potential sea angling licence (exclusive of freshwater angling), there would be about 800k licensed sea anglers each year, buying about 1 million licences.

1. Introduction

The Environment Agency wished to monitor the general public's attitudes toward angling. The interest in and attitudes toward angling amongst young people are of particular relevance since there is some evidence that participation in angling by young people has declined and future participation to a large degree is dependent on recruitment of the young.

An omnibus study was conducted in 1997, which assessed the public's attitudes toward angling. A small sample of 12-14 year olds was included within the overall survey to enable some analysis of the attitudes of young people.

A further omnibus study was also conducted in 2001, amongst the general public aged 12+yrs in England and Wales. Where similar questions were asked, the data from the 1997 and 2001 surveys are used extensively within this report to monitor change in angling activity and perceptions of angling.

2. Objectives

The overall objectives of the survey were to:

- assess attitudes toward angling in England and Wales, of the general public and of young people in particular;
- determine whether attitudes differ amongst different sectors of the population;
- determine if attitudes are changing over time.

Specific Objectives

To assess:

- the public's attitude toward angling, including attitudes of young people as determined by the reaction to a number of statements about angling;
 - the levels of participation in freshwater and sea angling
 - the interest amongst non-anglers of participating in the sport at some future date;
 - the factors that would encourage potential anglers, including youngsters to take up the sport;
- and
- to compare results with those from previous surveys and draw attention to any changes.

3. Method and Sample

The data were collected by means of face to face omnibus studies. ¹

¹ An omnibus survey is a quantitative survey – in other words it is concerned with interviewing a large and representative sample of people, with a view to extrapolating the results to represent the whole population.

An omnibus survey is conducted to a set timetable and takes place regularly throughout the year – typically on a weekly basis. Data collection is conducted either face-to-face in the respondents' homes, over the telephone or via the web.

An omnibus survey allows you to share the costs of research by having several clients on a survey. All the questions for a given wave are then put to a representative sample, as part of a single questionnaire. Results are processed in such a way as to ensure that each party only sees their own data.
BMRB Website 2005

2 omnibus studies were utilised:

2000 adult omnibus - over 1 week
Youth omnibus - over 4 weeks

Interviews were conducted between 3rd March and 6th April 2005. 2258 people were interviewed in total, 419 of whom were aged 12-16yrs.

Data were collected from sampling points within England and Wales, to be compatible with the Environment Agency's area.

Both the youth and adult samples were designed and subsequently weighted to be representative of the population in England and Wales, in terms of gender, age, social grade and region. A rim weighting technique was used in which target profiles are set for eight separate demographic variables. The computer system then allocates a weight to each individual such that the overall composition of the sample is balanced in terms of the targets set.²

Those aged 15+ were included within the adult sample, whilst the youth data were collected from 12-16 year olds.

The questions for the youth omnibus were worded to ensure the younger age groups could easily understand them. The meanings were however intended to be the same as for the adult questions.

Data from the youth and adult omnibus studies were added and appropriately weighted to give results for a population aged 12 years and over. These combined results together with the data from the youth omnibus are included within this report.

All the results and sample totals shown within the report are based on weighted data.

Significance tests have been conducted on independent proportions using Decision Analyst's software for market research, STATS™.

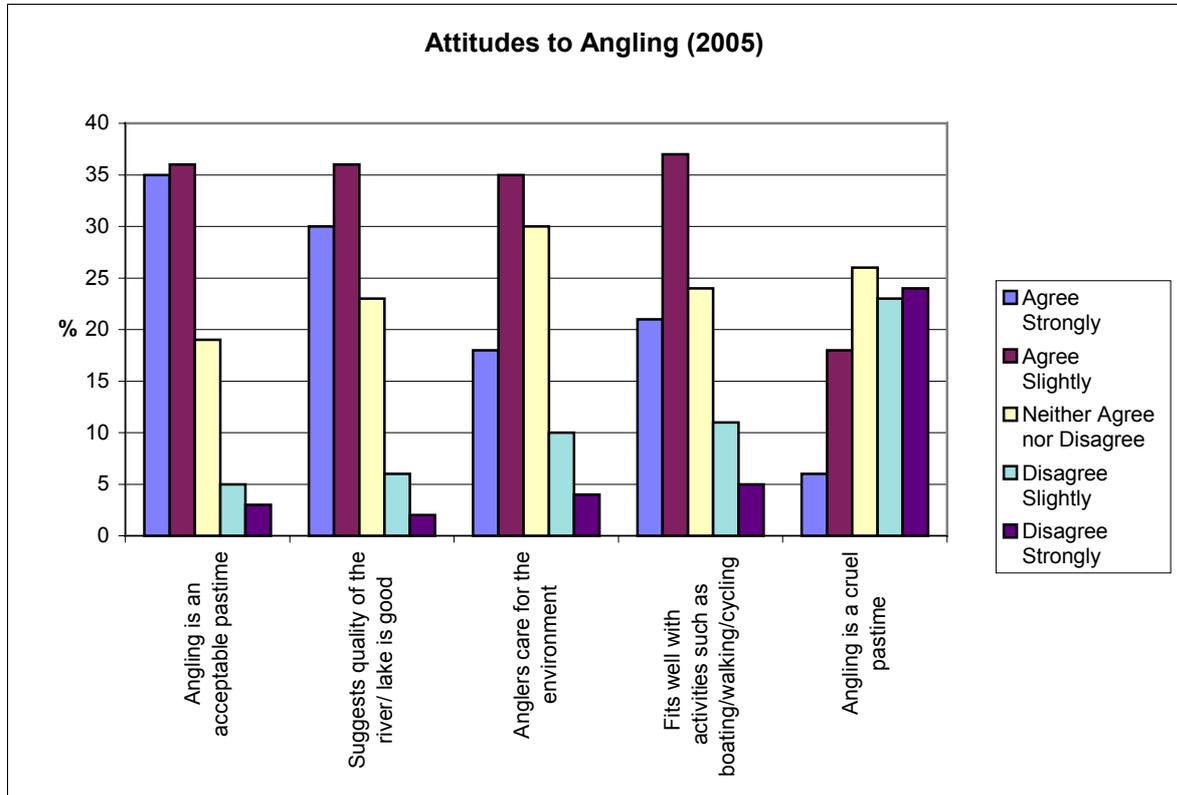
The margin of error at the 95% confidence level for the 2005 overall sample data (i.e. sample size over 2,000) is approximately +/-2%.

² Rim weighting is a method of applying a weight factor to an analysis that is based on target values of a number of single response variables. Given a list of variables and associated target counts (or target proportions), the Rim Weight program generates a new weight variable for the survey.
Snap Surveys Website 2005

4. Main Findings

4.1 Attitudes towards Angling

Figure 1 - Attitudes towards angling



(Base: Total sample, 12-65 yr olds)

Table 1 - Angling is an acceptable pastime

Angling is an acceptable pastime	Base		Agree Strongly	Agree Slightly	Neither Agree nor Disagree	Disagree Slightly	Disagree Strongly	D/K	Mean Score
2005 - 12 – 65+ yrs	2258	%	35	36	19	5	3	2	3.96
2001 - 12 - 65+ yrs	2254	%	41	32	16	5	5	1	4
1997 - 12 - 65+ yrs	2058	%	36	39	11	7	5	2	3.94
Angling is an OK thing to do									
2005 – Youth Data 12-16yrs	419	%	22	28	32	11	7	1	3.47
2001 - Youth Data 12-16yrs	398	%	23	35	24	10	6	2	3.59

The majority of the 2005 sample believed that angling is an acceptable pastime (71%). Only 8% of the sample disagreed with this statement and thus did not feel that angling is an acceptable pastime.

The results for 2005 are less polarised than those for 2001. A chi squared test shows significant change between 2001 and 2005. Fewer people agreed or disagreed strongly that angling is an acceptable pastime, with more either agreeing or being undecided. Chi-sq = 36.117, DF = 5, P-value = 0.01.

With regard to the youth sample, again the results were less polarised and slightly more positive than in 2001. A chi-squared test showed a significant difference between the youth 2001 and 2005 data at the 95% level. (Chi-sq = 12.051, DF = 5, P-Value = 0.034)

Half the youth sample (12-16yrs) agreed that angling was an “OK thing to do” (50%), although the level of agreement was not as high as for the overall sample. Significantly fewer 12-16yr olds (95% confidence level) believed angling was an OK thing to do in 2005 compared to 2001. In 2001 58% agreed that angling was an OK thing to do. The proportion of 12-16yrs olds who were undecided had increased significantly (95% level) from 24% in 2001 to 32% in 2005. This level of uncertainty was high compared to the overall sample.

(It is possible that the statement “angling is an OK thing to do” could be interpreted as ethically acceptable or acceptable in the sense of being “in fashion”.)

Table 2 – Angling activity suggests that the quality of the river or lake is good

Angling activity suggests that the quality of the river or lake is good	Base		Agree Strongly	Agree Slightly	Neither Agree nor Disagree	Disagree Slightly	Disagree Strongly	D/K	Mean Score
2005 – 12 – 65+yrs	2258	%	30	36	23	6	2	3	3.90
2001 - 12 - 65+ yrs	2254	%	34	30	22	8	4	2	3.84
1997 - 12 - 65+ yrs	2058	%	33	37	13	8	3	6	3.94
If you see someone angling you would think the water in the river or lake is clean									
2005 – Youth Data 12-16yrs	419	%	11	25	34	18	8	3	3.13
2001 - Youth Data 12-16yrs	398	%	13	29	27	19	9	3	3.19

Considering the statement, “Angling activity suggests the quality of the river or lake is good”, a chi-squared test shows a significant change between the 2001 and 2005 results, chi-sq = 55.620, DF = 5, P-value = 0.01. The 2005 results were again less polarised.

The largest proportion of respondents agreed that angling activity suggests that the quality of the river or lake is good (66%). Significantly fewer people at the 99% level agreed strongly in 2005 compared to 2001 or 1997. A high proportion of the sample continued to neither agree nor disagree, whilst significantly fewer (at the 99% level) disagreed compared to both 2001 and 1997 data.

A chi-squared test showed no difference between the youth 2001 and 2005 data. (Chi-sq = 5.336, DF = 5, P-Value = 0.376)

As for the previous statement the youth sample were more likely to agree than disagree with this statement. The greatest proportion of those agreeing fell into the agree slightly category. A high proportion neither agreed nor disagreed. The proportion who were undecided had increased significantly (95% level) since 2001. As in 2001 the youth sample did however appear more likely to disagree than the overall sample.

Table 3 – Anglers care for the environment

Anglers care for the environment	Base		Agree Strongly	Agree Slightly	Neither Agree nor Disagree	Disagree Slightly	Disagree Strongly	D/K	Mean Score
2005 – 12- 65+yrs	2258	%	18	35	30	10	4	3	3.56
2001 - 12 - 65+ yrs	2254	%	18	28	34	12	6	2	3.41
1997 - 12 - 65+ yrs	2058	%	20	34	22	13	5	6	3.54
Anglers care for the environment									
2005 – Youth Data 12-16yrs	419	%	9	27	38	15	8	2	3.15
2001 - Youth Data 12-16yrs	398	%	14	23	32	19	7	5	3.18

53% of the sample agreed that anglers care for the environment. Only 14% disagreed with this statement, however 30% of the sample neither agreed nor disagreed.

A chi-squared test shows a significant change between the 2001 and 2005 results. (Chi-sq = 37.893, DF = 5, P-value = 0.01)

The proportion agreeing with the statement had increased significantly (99% level) since 2001, returning to levels recorded in 1997. The proportion who disagreed (14%) was actually significantly (99% level) lower than levels recorded in 2001 (18%) and 1997 (18%). Thus perceptions that anglers care for the environment have become more positive.

A chi-squared test also showed a significant difference between the youth 2001 and 2005 data at the 95% level. (Chi-sq = 14.239, DF = 5, P-Value = 0.014)

On the whole the youth sample was more likely to agree than disagree with this statement, however as for previous statements the level of disagreement was higher than for the overall sample (23%). Significantly fewer 12-16yr olds agreed strongly however the proportion agreeing overall remained similar to that in 2001. The proportion who were undecided was also high (38%) but not significantly higher than in 2001.

Table 4 – Angling fits in well with other activities such as boating and walking or cycling along the riverbank

Angling fits in well with other activities such as boating and walking or cycling along the river bank	Base		Agree Strongly	Agree Slightly	Neither Agree nor Disagree	Disagree Slightly	Disagree Strongly	D/K	Mean Score
2005 – 12-65+yrs	2258	%	21	37	24	11	5	2	3.59
2001 - 12 – 65+ yrs	2254	%	22	32	21	14	9	1	3.46
1997 - 12 – 65+ yrs	2058	%	20	38	13	16	9	3	3.48
Angling goes well with things like boating and walking or cycling along the river bank									
2005 – Youth Data 12-16yrs	419	%	18	32	31	11	6	2	3.45
2001 - Youth Data 12-16yrs	398	%	15	34	24	17	7	3	3.34

Just over half the sample agreed that angling fits in well with other activities such as boating, walking and cycling along the riverbank. 16% disagreed with this statement, however the level of disagreement had reduced significantly (95% level) since 2001. The overall level of agreement had also increased significantly at the 99% level. Overall the mean score has significantly increased at the 99% level, showing a more positive response overall.

A chi-squared test also shows a significant change between the 2001 and 2005 results. (Chi-sq = 44.63, DF = 5, P-value = 0.01)

50% of the youth market agreed with the statement, whilst 17% disagreed. Since 2001 there had been a significant increase (95% level) in the proportion who were undecided and a significant decrease (95% level) in those who disagreed, overall resulting in a more positive mean score.

A chi-squared test showed a significant difference between the youth 2001 and 2005 data at the 95% level. (Chi-sq = 11.225, DF = 5, P-Value = 0.047)

Table 5 – Angling is a cruel pastime

Angling is a cruel pastime	Base		Agree Strongly	Agree Slightly	Neither Agree nor Disagree	Disagree Slightly	Disagree Strongly	D/K	Mean Score
2005 – 12-65+yrs	2258	%	6	18	26	23	24	2	2.58
2001 - 12 - 65+ yrs	2254	%	8	16	24	23	29	1	2.5
1997 - 12 - 65+ yrs	2058	%	11	16	18	31	21	3	2.65
Angling is cruel									
2005 – Youth Data 12-16yrs	419	%	10	24	27	21	15	1	2.93
2001 - Youth Data 12-16yrs	398	%	10	21	27	21	20	2	2.8

As in 2001 and 1997, the majority of respondents did not feel that angling was a cruel pastime. 47% disagreed with the statement. Since 2001 the proportion who agreed strongly and disagreed strongly had in fact decreased, whilst the proportion who were undecided had increased. Views appear therefore to have become slightly less polarised with more people taking the middle ground.

A chi-squared test shows a significant change between the total 2001 and 2005 results, chi-sq = 29.628, DF = 5, P-value = 0.00. A test on the mean scores also suggests an increase in the mean score, suggesting that views toward angling are slightly less positive in 2005 compared to 2001.

The situation amongst the youth sample was less clear cut. 36% disagreed that angling was cruel, whilst 34% felt that it was cruel. 27% neither agreed nor disagreed. There had been no significant change since 2001.

A chi-squared test showed no difference between the youth 2001 and 2005 data. (Chi-sq = 4.004, DF = 5, P-Value = 0.549)

Age:

Generally, the older the age group the more positive the view about angling and the greater the likelihood to agree with statements such as “Angling is an acceptable pastime”; “Angling activity suggests the water quality of the river or lake is good”; “Anglers care for the environment”; and “Angling fits with other activities such as boating and walking or cycling along the riverbank”. Views on “Angling is cruel”, did not however vary notably by age.

Gender:

The males were more likely to agree than the females with “angling is an acceptable pastime”, “angling activity suggests the quality of the river or lake is good”, and “anglers care for the environment”.

Regions:

In 2005 it appeared that views in London were less positive than in other regions. This may be due at least in part to there being less opportunity to fish in the urban environment of London and the presence of more competing activities.

Table 6 - Attitudes toward angling by ethnic origin

Angling is an acceptable pastime	Base	Agree	Neither agree nor disagree	Disagree
White	2017	73%	17%	8%
Asian	88	52%	31%	13%
African/Caribbean	50	32%	56%	4%
Angling activity suggests the quality of the river or lake is good				
White	2017	69%	22%	7%
Asian	88	34%	42%	17%
African/Caribbean	50	38%	32%	18%
Anglers care for the environment				
White	2017	55%	29%	13%
Asian	88	42%	35%	16%
African/Caribbean	50	36%	46%	6%
Angling fits with other activities				
White	2017	60%	22%	16%
Asian	88	41%	32%	20%
African/Caribbean	50	36%	44%	10%
Angling is a cruel pastime				
White	2017	24%	25%	49%
Asian	88	25%	42%	30%
African/Caribbean	50	10%	52%	28%

Generally it would appear that the white sub group were more likely to be positive about angling than the Asian or African/Caribbean sub groups. Although the Asian and Afro-Caribbean groups were less positive i.e. less likely to agree with the 1st four statements, they were more likely to neither agree nor disagree, perhaps reflecting a lower interest in or reduced knowledge of angling compared to the white majority.

The Asian and Afro-Caribbean sub groups were no more likely than the white sub group to consider angling to be cruel, however they were again much more likely to neither agree nor disagree.

If Asians and Afro-Caribbeans are more likely to be urban they will have less experience of angling.

4.2 Freshwater Angling Participation Within England and Wales (Current Anglers)

The 2005 study suggests that 8% of the population within England and Wales have been freshwater fishing in the last 2 years.

This result is in line with that recorded in 2001 and 1997 i.e. 9%.

There has been no significant change in the proportion of the sample who went freshwater fishing between 2001 and 2005. (Chi square = 0.501, DF = 1, P-value = 0.479)

Based on a population aged 12 and over in England and Wales of 44,254,462* the number of people aged 12 and over who have been freshwater fishing in the last 2 years is 3.5million.

(* Source - Office of National Statistics – 2001 Census)

The 2005 data again show a considerable disparity on figures obtained in the 1994 National Anglers Survey - 2.3 million coarse anglers, but this may be due to a different survey technique.

The number of anglers suggested in the above studies is still considerably greater than sales of Environment Agency Rod Licences in any one year (approx. 1 million), even allowing for licence evasion and the proportion of anglers who do not fish every year.

The profiles of those who have been freshwater fishing in England and Wales were compared to the profile of rod licence holders *. (* Source –Simpson and Mawle, June 2001)

Figure 2 - Profile of current anglers

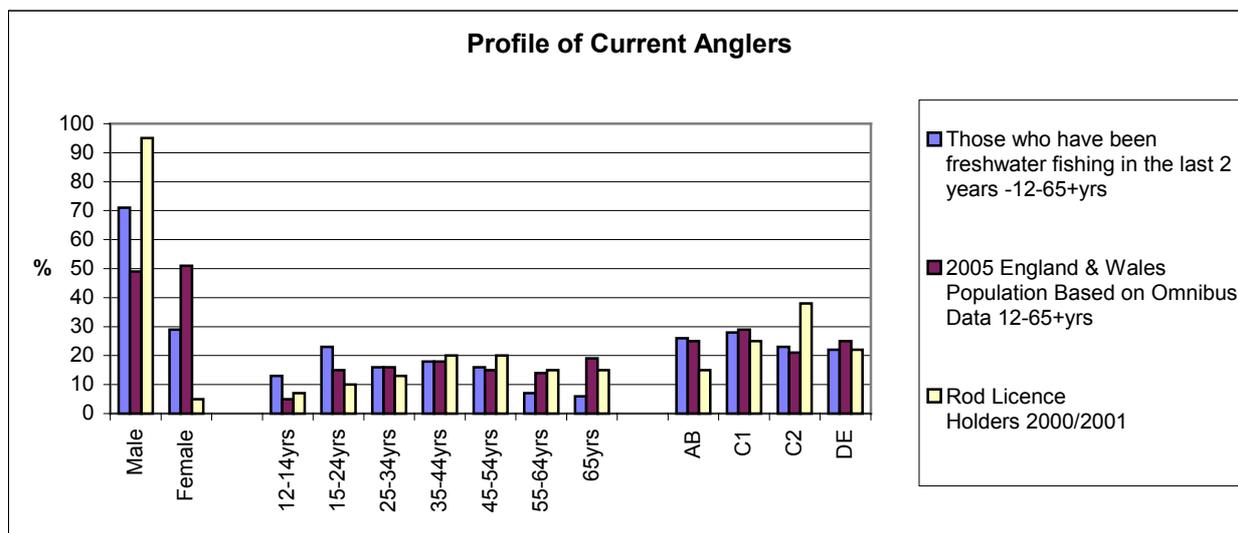


Table 7 – Demographic profile of freshwater anglers

	Total Omnibus Sample	Those who have been freshwater fishing in the last 2 years		Those who have been freshwater fishing in the last 2 years	Rod Licence Holders
		2005 12-65+ yrs	2001 12-65+ yrs	1997 12-65+ yrs	2001
PROFILE OF ANGLERS	2005 12-65+ yrs	2005 12-65+ yrs	2001 12-65+ yrs	1997 12-65+ yrs	2001
Base	2258	188	201	520	2600
SEX	%	%	%	%	%
Male	49	71	80	77	95
Female	51	29	20	23	5
AGE					
12-14yrs	5	13	11	8	7
15-24yrs	15	23	25	29	10
25-34yrs	16	16	14	24	13
35-44yrs	18	18	18	19	20
45-54yrs	15	16	15	9	20
55-64yrs	14	7	6	6	15
65yrs	19	6	10	5	15
SOCIAL GRADE					
AB	25	26	23	17	15
C1	29	28	24	22	25
C2	21	23	28	29	38
DE	25	22	25	33	22

NB: Rod licence holders data - actual age groups for the younger respondents used within the study were 12-16yrs and 17-24yrs.

It can be seen from the table above that the profile of those who said they had been fishing in the last 2 years is predominantly male, with a high proportion of 12-24 year olds compared to the total sample profile.

As was the case in 2001, the profile of rod licence holders* shows a much lower proportion of females, an apparently older age profile and a higher proportion of C2s. There are far fewer anglers in the rod licence data aged 15-24yrs.

These findings could suggest that a proportion of those who have been freshwater fishing in the last 2 years may possibly have accompanied an angler rather than gone fishing in their own right as a licence holder, particularly the females, but also the younger age groups. Licence evasion may also be higher amongst these 2 groups as they are more likely to be novices or infrequent anglers.

*Source: Simpson and Mawle, June 2001.

Table 8 – Regional profile of anglers

Region of Residence	Total Omnibus Sample	Those who have been freshwater fishing in the last 2 years		Those who have been freshwater fishing in the last 2 years
	2005 12-65+yrs	2005 12-65+yrs	2001 12-65+yrs	1997 12-65+yrs
Base	2258	188	201	520
	%	%	%	%
London	14	9	13	13
South East	21	27	23	21
South West	10	9	11	9
Wales	5	3	6	4
East Anglia	4	9	6	5
East Midlands	8	7	9	10
West Midlands	10	15	7	13
Yorks/Humber	10	7	9	9
North West	12	9	11	13
North	6	5	6	3

On the whole the incidence of anglers across the country is broadly similar to that found in 2001 and 1997, with the highest concentration in the South East in line with the total population distribution.

Table 9 - Ethnic profile of anglers

Ethnic Origin	Total Omnibus Sample	Those who have been freshwater fishing in the last 2 years	England and Wales population*
	2005 12-65+ yrs	2005 12-65+ yrs	
Base	2258	188	
	%	%	%
White	89	94	91
Asian	4	3	4
African/Caribbean	2	0	2

*ONS, 2001 Census, England and Wales population

In this table and in the remainder of the report the Asian sub group includes Indian, Pakistani, Bangladeshi and any other Asian background, based on the ethnic groupings used within the ONS census. The African/Caribbean (Afro-Caribbean) sub group includes Caribbean, African and any other black background. There may be differences between the ethnic groups by region, however the above data is currently aggregated by region.

In line with the total sample the vast majority of anglers were white. The sample did not contain any African or Caribbean anglers. The current angler profile contained significantly more whites and fewer African/Caribbeans than the total omnibus sample.

Looking at the data in a slightly different way 9% of the white sample, 6% of the Asian sample and 0% of the Afro-Caribbean sample had been freshwater fishing in the last 2 years.

Profile of Youth Anglers (i.e. Those who have been freshwater fishing in England and Wales in the last 2 years.)

19% of the youth sample had been freshwater fishing in the last 2 years. This compares to 21% recorded in 2001, and which does not represent a significant difference (chi-sq 0.571, DF = 1, P-value = 0.450)

Table 10 – Profile of youth anglers

	Total Omnibus Sample	2005 Youth 12-16yrs (Those who had been fishing in the last 2 years)	2001 Youth 12-16yrs (Those who had been fishing in the last 2 years)
Base	419	81	85
SEX	%	%	%
Male	51	74	73
Female	49	26	27
AGE			
12-14	61	72	61
15-16	39	28	38
SOCIAL GRADE			
AB	24	19	22
C1	28	25	26
C2	22	22	28
DE	26	35	23
Region of Residence			
London	13	4	4
South East	21	24	35
South West	9	7	10
Wales	5	5	11
East Anglia	5	7	9
East Midlands	10	16	4
West Midlands	10	14	7
Yorks/Humber	11	6	7
North West	11	11	7
North	6	6	5

The young anglers were again predominantly male, but otherwise broadly matched the population profile for the relevant age group. There were however significantly more 12-14yr olds (95% level) in the current angler profile than in the total omnibus sample.

4.3 Recent Freshwater Anglers

In 2005 an additional question was included within the study to determine the proportion of the population who had been freshwater fishing in the last year.

The results show that 6% of the total population have been freshwater fishing in the last year. Based on an England and Wales 12+ population of 44,254,462 this suggests that 2.6million people had been freshwater fishing in the last year. This compares to 8% of the total sample who had fished in the last 2 years.

72% of current anglers i.e. those who had fished in the last 2 years had also fished in the last year. 28% of those who had fished in the last 2 years had not however fished in the last year. This represents a high proportion of people who do not therefore buy a rod licence every year.

Table 11 – Demographic profile of recent anglers

	Total Omnibus Sample	Those who have been freshwater fishing in the last year	Those who have been freshwater fishing in the last 2 years	Rod Licence Holders 2000/2001
PROFILE OF ANGLERS	2005 12-65+yrs	2005 12-65+yrs	2005 12-65+ yrs	2001
Base	2258	136	188	2600
SEX	%	%	%	%
Male	49	69	71	95
Female	51	31	29	5
AGE				
12-14yrs	5	15	13	7
15-24yrs	15	18	23	10
25-34yrs	16	18	16	13
35-44yrs	18	20	18	20
45-54yrs	15	17	16	20
55-64yrs	14	6	7	15
65yrs	19	6	6	15
SOCIAL GRADE				
AB	25	24	26	15
C1	29	26	28	25
C2	21	26	23	38
DE	25	23	22	22

NB: Rod licence holders data - actual age groups for the younger respondents used within the study were 12-16yrs and 17-24yrs.

The profile of anglers who had been freshwater fishing in the last year was very similar to the profile of those who had fished in the last 2 years.

Recent Youth Anglers

14% of the total sample of 12-16yr olds had fished in the last year, compared to 19% who had fished in the last 2 years.

73% of the youth sample who had fished in the last 2 years had also fished in the last year. Thus 27% of the current anglers* had not fished in the last year. This is a very similar result to that for the total sample.

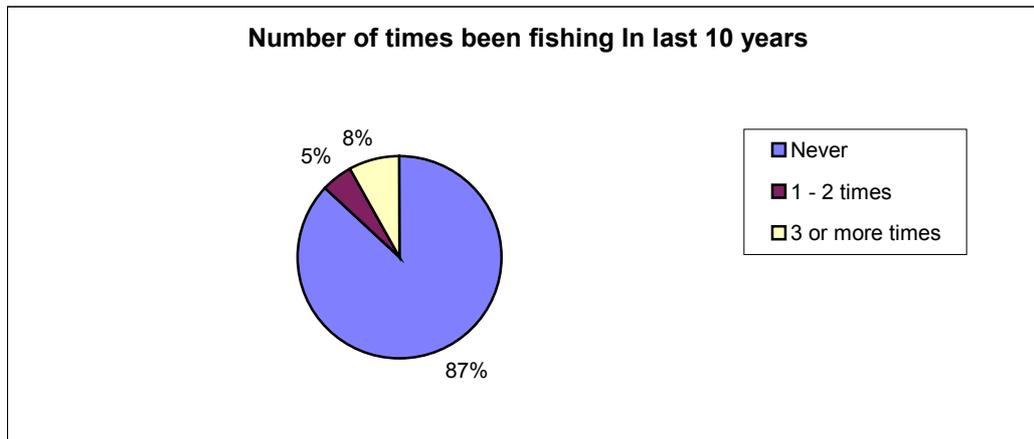
*Current anglers are defined as those who had been freshwater fishing in the last 2 years.

The recent youth anglers showed a similar demographic profile to the current youth anglers.

4.4 Those who had not been Freshwater Fishing in England or Wales in the last 2 years

Of those respondents who had not been freshwater fishing in the last 2 years, the majority, 87% had not fished in the last 10 years. 5% had fished 1-2 times previously, whereas 8% had fished on 3 or more occasions in the last 10 years.

Figure 3 – Number of times been fishing in the last 10 years



(Base 2070, those who had not been freshwater fishing in England and Wales in the last 2 years)

The proportion who had not fished before was comparable with that recorded in 2001, whilst there had been a significant increase, at the 95% level, in the proportion who had fished 3 or more times since 2001 and a significant decrease at the 99% level in those who had only fished 1-2 times in the last 10 years.

Table 12 - Number of times been freshwater fishing

	2005	2001
Base	2070	2053
Never	87%	87%
1-2 times	5%	7%
3 or more times	8%	6%

(Base, those who had not been freshwater fishing in England and Wales in the last 2 years)

20% of the total sample had in fact been fishing in the last 10 years (i.e. been fishing in last 2 years 8%, been fishing 2-10 years ago 11.6% of the total sample). This is in line with the situation in 2001.

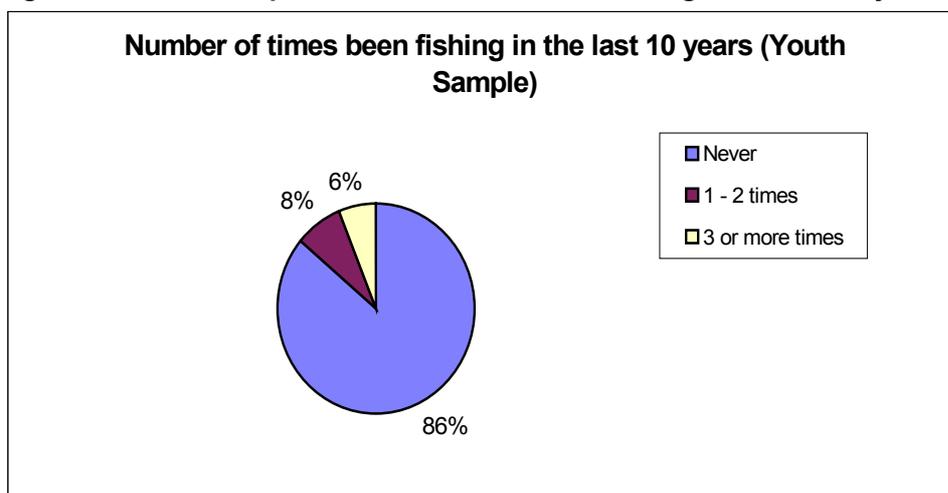
Table 13 – Number of times been freshwater fishing in the last 10 years by age and gender

	Total	Sex		Age						
		Male	Female	12-14yrs	15-24	25-34	35-44	45-54	55-64	65+
Base	2070	965	1105	80	294	319	372	306	291	408
	%	%	%	%	%	%	%	%	%	%
Never	87	83	91	83	83	82	87	92	89	91
1-2 times	5	7	3	12	8	7	5	3	3	2
3 or more times	8	10	6	5	9	10	8	5	8	7

(Base, those who had not been freshwater fishing in England and Wales in the last 2 years)

The females and older age groups were the least likely to have fished in the last 10 years. There did not appear to be any difference by ethnic group.

Figure 4 – Youth sample, number of times been fishing in the last 10 years



(Base, 338, 12-16yr olds who had not been freshwater fishing in England and Wales in the last 2 years)

The youth data reflect the data for the total sample, in that the highest proportion had not fished before.

Table 14 – Number of times been freshwater fishing in last 10 years – youth sample

	2005 youth 12-16yrs	Male	Female
Base	338	155	183
	%	%	%
Never	86	84	88
1-2 times	8	9	8
3 or more times	6	7	4

Base: Those who had not been freshwater fishing in England and Wales in the last 2 years

Since 2001 the proportion who had never fished had increased from 79% to 86%. This represents a significant increase at the 95% level. Conversely the proportion who had fished 1-2 times had decreased from 15% to 8%. The proportion who had fished 3 or more times remained constant at 6%.

4.5 Lapsed Anglers

Lapsed anglers are defined as those who had been freshwater fishing in the last 10 years, but had not been freshwater fishing in the last 2 years.

11.6% of the 2005 sample were defined as lapsed anglers. This is not significantly different from the 11.5% identified in 2001 and the 12% recorded in 1997.

39% of the lapsed anglers had fished 1-2 times in the last 10 years, whilst 61% had fished 3 or more times.

The number of lapsed anglers within the population is greater than the number who had fished in the last 2 years. Based on a population aged 12+yrs in England and Wales of 44,254,462 the number of lapsed anglers is approximately 5m.

Figure 5 – Profile of lapsed anglers – compared to the profile of current anglers

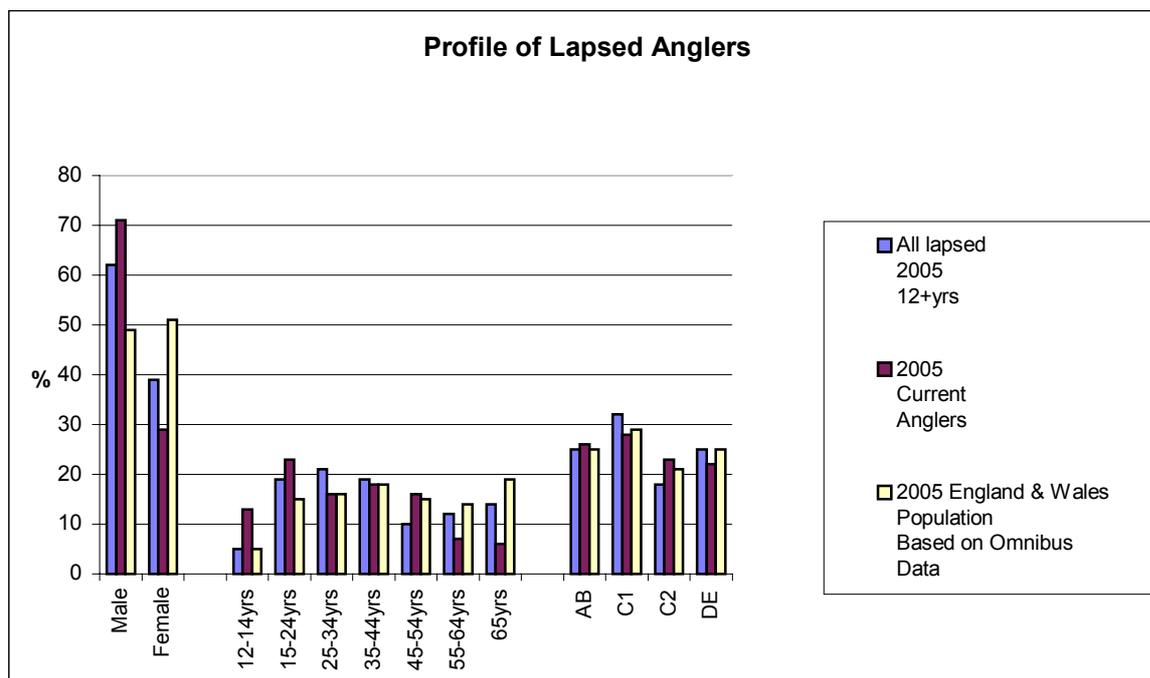


Table 15 – Profile of lapsed anglers

PROFILE OF LAPSED ANGLERS	All lapsed 2005 12+	All lapsed 2001 12+	All lapsed 1997 12+	2001 Lapsed Fished 1-2 times	2001 Lapsed Fished 3+ times	2005 Current Anglers	2005 Total Omnibus Sample
Base	262	260	642	101	161	188	2258
SEX	%	%	%	%	%	%	%
Male	62	64	65	64	60	71	49
Female	39	37	35	37	40	29	51
AGE							
12-14yrs	5	6	3	10	2	13	5
15-24yrs	19	23	31	23	17	23	15
25-34yrs	21	26	23	24	20	16	16
35-44yrs	19	19	17	20	18	18	18
45-54yrs	10	13	12	10	9	16	15
55-64yrs	12	7	6	8	15	7	14
65yrs	14	7	8	7	17	6	19
SOCIAL GRADE							
AB	25	23	15	26	24	26	25
C1	32	27	24	33	32	28	29
C2	18	21	31	19	18	23	21
DE	25	30	30	23	26	22	25

The profile of lapsed anglers was predominantly male, but had a higher proportion of females than the current angler profile. The social grade profile did not vary markedly between lapsed and current anglers. The lapsed anglers did however appear to have an older age profile than the current anglers.

Since 1997 the proportion of 15-24yr old lapsed anglers appears to have decreased, whilst the proportion of lapsed anglers aged 55+ appears to have increased (99% level)

Table 16 - Lapsed youth anglers:

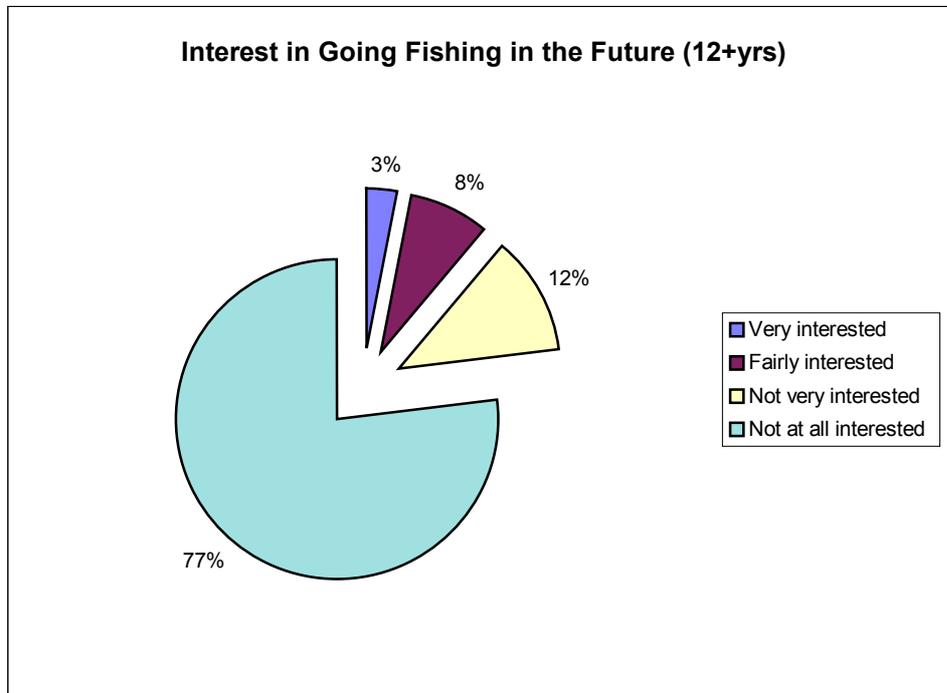
	2005 lapsed youth anglers 12-16yrs	2005 current youth anglers 12-16yrs
Base	47	81
SEX	%	%
Male	51	74
Female	47	26
AGE		
12-14	66	72
15-16	34	28
SOCIAL GRADE		
AB	28	19
C1	26	25
C2	23	22
DE	21	25

Although the base size is small it appeared that there was a greater lapse rate amongst female compared to male youth anglers.

11% of the total youth sample were lapsed anglers.

4.6 Interest in Going Fishing in the Future

Figure 6 – Interest in going fishing in the future (12+yrs)



Base: 2070 All those who had not been fishing in the last 2 years (12-65+yrs)

11% of current non-anglers were interested in going fishing at some time in the future. Those who had fished previously were significantly more interested (99% level) in going fishing (see table 17).

Table 17 – Interest in going fishing in the future

Interest in going fishing in the future 12yrs+	2005	2001	1997	Times been freshwater fishing in last 10 years?		
				Never	1-2 times	3 or more times
Base	2070	2053	5258	1808	101	161
Mean score	1.37	1.34	1.36	1.27	2.16	1.96
	%	%	%	%	%	%
Very interested	3	2	2	1	11	11
Fairly interested	8	7	9	6	24	23
Not very interested	12	14	12	11	34	16
Not at all interested	77	77	77	82	31	49

Interest in going fishing has remained fairly consistent since 1997.

A chi-squared test conducted on the 2005 and 2001 data shows no significant difference in the results. Chi-sq = 6.308, DF = 3, P-value = 0.098. This is supported by a test on the mean scores.

Table 18 – Interest in going fishing in the future by age

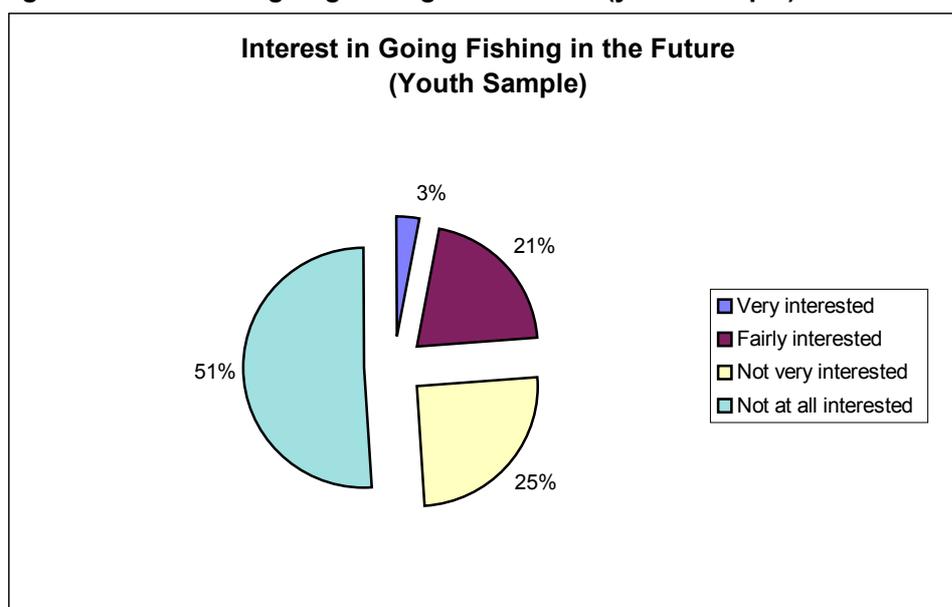
Interest in going freshwater fishing in the future	TOTAL	Male	Female	12-14yrs	15-24	25-34	35-44	45-54	55-64	65+
	%	%	%	%	%	%	%	%	%	%
Base	2070	965	1105	80	294	319	372	306	291	408
INTERESTED	11	16	6	27	22	15	6	11	8	3

As was the case in 2001, interest was greater amongst males than females, and interest increased the younger the age group.

There appeared to be no notable difference by ethnic group (white 10% base 1841, Asian 15%, base 83, African/Caribbean 14%, base 50)

Youth:

Figure 7 – Interest in going fishing in the future (youth sample)



(Base, 338, 12-16yr olds who had not been freshwater fishing in England and Wales in the last 2 years)

24% of the youth sample who had not fished in the last 2 years were very or fairly interested in going fishing. This suggests a high level of unsatisfied demand and offers a lot of potential for the future development of the youth market.

It would therefore appear that the 12-16yr age group had more interest in going fishing in the future than the overall sample.

Interest was similar amongst the 12-14 and 15-16 year age groups (25% and 23% respectively). Interest was however greater amongst males than females: males 34% interested, females 17% interested.

Table 19 – Interest in going fishing in the future – youth sample

Interest in going fishing in the future - 2001 12-16yrs	2005	2001
Base (wtd.)	338	313
Mean score	1.77	1.69
	%	%
Very interested	3	4
Fairly interested	21	15
Not very interested	25	26
Not at all interested	51	54

There had been no significant change in the level of interest in going fishing amongst the youth market between 2001 and 2005 (chi-sq 5.566, DF = 3, P-value = 0.135)

4.7 Potential Anglers

A potential angler is defined as someone who has not been freshwater fishing in the last 2 years, but is very or fairly interested in doing so in the future (thus this includes both lapsed anglers and those who have not been fishing in the last 10 years).

10% of the total sample could be defined as potential anglers. (2% of the total sample were very interested in going fishing, whilst 8% were fairly interested.)

This suggests that there are just over 4.4 million potential anglers in England and Wales, based on a population of 44,254,462 aged 12+yrs in England and Wales.

In 1996 the proportion of potential anglers in England and Wales was 9%, whilst the proportion in 1997 was 10% and 8% in 2001. The proportion of potential anglers has increased significantly at the 95% level since 2001.

Figure 8 – Profile of potential anglers – compared to the profile of current anglers

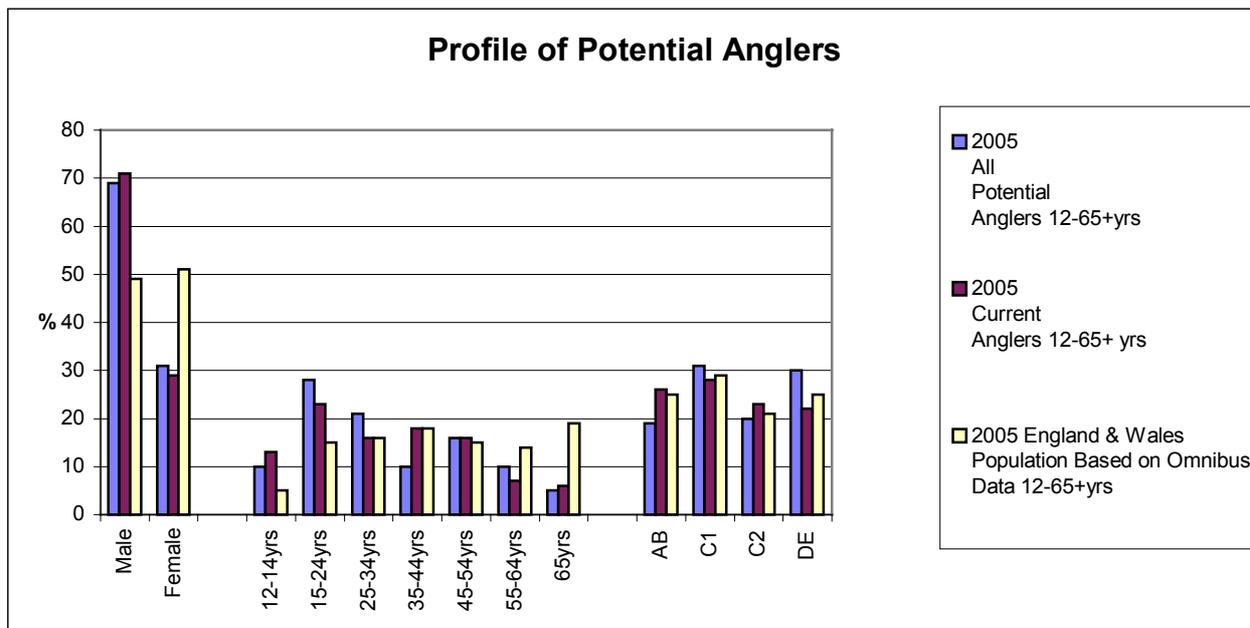


Table 20 – Profile of potential anglers

PROFILE OF POTENTIAL ANGLERS	2005 All Potential Anglers 12-65+yrs	2001 All Potential Anglers 12-65+yrs	1997 All Potential Anglers	2005 Current Anglers 12-65+yrs	2005 Total Omnibus Sample 12-65+yrs
Base	224	185	555	188	2258
Sex	%	%	%	%	%
Male	69	66	66	71	49
Female	31	34	35	29	51
Age					
12-14yrs	10	11	6	13	5
15-24yrs	28	15	23	23	15

25-34yrs	21	28	26	16	16
35-44yrs	10	22	16	18	18
45-54yrs	16	10	13	16	15
55-64yrs	10	7	9	7	14
65yrs	5	6	7	6	19
Social Grade					
AB	19	16	12	26	25
C1	31	26	24	28	29
C2	20	23	32	23	21
DE	30	35	32	22	25

The potential angler profile was broadly similar to that identified in 2001, with the exception of a significant increase (99% level) in the proportion of 15-24yrs olds and decrease in 35-44yr age group. This suggests the potential angler profile is younger than in 2001, however these changes have brought the data more in line with the findings of the 1997 study.

The profile of potential anglers had a similar proportion of males and females compared to the current angler profile, but a significantly higher proportion of 15-34yr olds (95% level).

The profile by region was similar to that for current anglers, with the exception of London where this region represented 20% of potential anglers and only 9% of current anglers (significant difference at the 99% level).

Table 21 - Potential youth anglers:

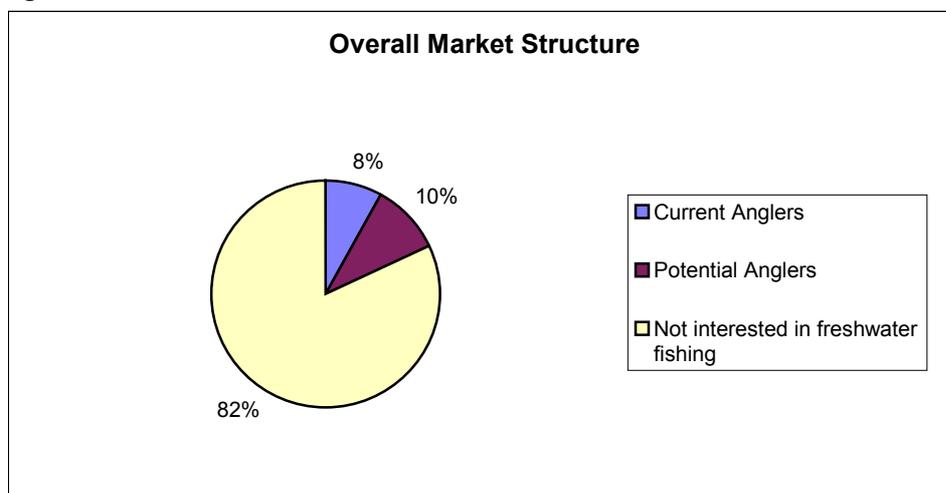
	2005 potential youth anglers 12-16yrs	2005 current youth anglers 12-16yrs
Base	83	81
SEX	%	%
Male	64	74
Female	36	26
AGE		
12-14	60	72
15-16	40	28
SOCIAL GRADE		
AB	20	19
C1	35	25
C2	25	22
DE	19	25

20% of the youth sample were potential anglers, i.e. very or fairly interested in going fishing.

There were no significant differences between the potential youth sample and the current youth angler profile.

4.8 Overall Market Structure

Figure 9 – Overall market structure



The research suggests that taking the population of England and Wales, 8% have been freshwater fishing in the last 2 years, 10% are interested in going freshwater fishing in the future and 82% have no interest in going freshwater fishing.

Of the potential anglers 60% had not been fishing in the last 10 years (i.e. new anglers), whilst 40% had been freshwater fishing in the last 10 years i.e. are lapsed anglers.

In the future it could be valuable to identify lapsed anglers from the rod licence database and target these lapsed anglers as part of a marketing and promotion exercise.

The data collected in 2001 and 1997 reflect the above findings i.e. 2001: 9% current anglers, 8% potential and 83% not interested; 1997: 9% current anglers, 10 % potential and 81% not interested.

Table 22 - Structure of the Market

	2005	2001	1997
Current anglers	8%	9%	9%
Recent anglers	6%	*	*
Lapsed anglers	12%	11.5%	12%
Potential anglers	10%	8%	10%
Non potential/not interested	82%	83%	81%

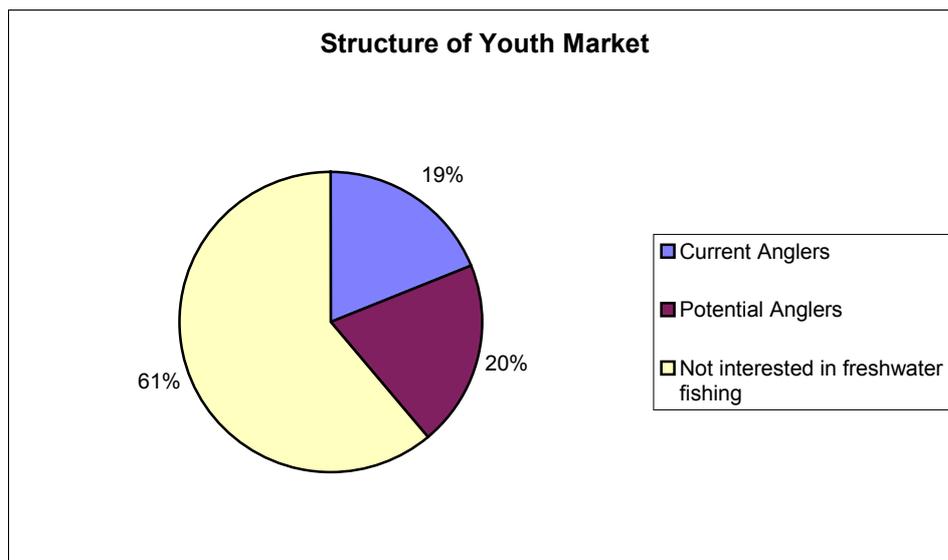
*Data not collected in 2001 or 1997

NB The percentages do not total 100% as there is overlap between recent and current anglers and lapsed and potential anglers.

The above figures suggest the market size and overall structure has changed little over the past 8 years and that there is still potential to grow the number of anglers if barriers to fishing can be overcome.

When considering the structure of the youth market specifically, the results are quite different.

Figure 10 – Structure of the youth market



Compared to the overall population of England and Wales, a higher proportion of the youth market are currently involved in angling or are potentially interested in going freshwater fishing. 72% of those interested in fishing had not fished before (or at least, not in the last 10 years), whilst 28% were lapsed youth anglers.

Table 23 - Structure of the Youth Market

	2005	2001
Current anglers	19%	21%
Recent anglers	14%	*
Lapsed anglers	11%	16%
Potential anglers	20%	15%
Non potential/not interested	61%	64%

*Data not collected in 2001

NB The percentages do not total 100% as there is overlap between recent and current anglers and lapsed and potential anglers.

Again as with the total sample there is opportunity to grow the number of young anglers given the proportion of potential youth anglers.

4.9 Factors that would encourage Respondents to go Freshwater Fishing

Table 24 – Factors that would encourage you to go fishing again

Q4 Factors that would encourage you to go fishing again	2005	2001
Base	150	177
	%	%
Someone to go with	34	33
Reduction in licence fees	26	17
Greater awareness of local fishing sites	21	23
Places to fish AND take children	21	18
Ability to buy a licence from more places	20	8
Easier use of local fishing ponds/lakes etc.	19	16
Better facilities for anglers at each watercourse	13	16
Ability to borrow/hire tackle	11	18
Higher profile of fishing generally amongst the public	11	7
Greater awareness of local fishing clubs	10	6
Improved fish stocks	9	19
Promotion of the fishing season	9	10
Other	14	17
Don't Know	3	4
Nothing	11	10

Base: All those who had not fished in the last 2 years, but had fished in the last 10 years and were very, fairly or not very interested in fishing again in the future.

Having someone to go with remained the key factor that would encourage the lapsed anglers to fish again. This appeared to have a greater influence the younger the age group.

A reduction in licence fees and the ability to buy a licence in more places were mentioned by a greater proportion of potential anglers in 2005 compared to 2001. There was a significant increase in the proportion of respondents mentioning a reduction in licence fees in 2005 at the 95% level and a significant increase at the 99% level in the proportion mentioning being able to buy a licence in more places. This may be related to an increase in the licence fee over time, however a similar response from the juniors where the licence fee has in fact decreased suggests that this is not the only issue.

Knowledge of local places to fish, places to fish and take children and easier use of local fishing sites were also key factors. Places to fish and take children was of particular interest to the females and also the 35-54 year olds i.e. potentially those with children.

A chi squared test shows a difference between the 2001 and 2005 results at the 95% level (chi-sq = 24.131, DF = 13, P- value = 0.030)

Table 25 - Youth sample - factors that would encourage you to go fishing again

Q4 Which of the following factors would encourage you to go fishing again? 12-16yrs	2005	2001
Base	35	49
	%	%
Having someone to go with	55	48
Knowing places to fish that are close to home	39	27
Paying less money for the fishing licence	34	14
If more people were involved in fishing and knew more about it	28	15
Having things like toilets and snack bars at the places you go fishing	26	8
More fish in the rivers or lakes	25	19
If it was easier to use fishing ponds or lakes near to home	21	6
Places to fish AND take children	16	5
Being able to buy a licence from more places	15	4
Knowing when the fishing season starts and finishes	14	7
Knowing about fishing clubs that are near to home	12	5
Being able to borrow or hire fishing tackle	8	8
Other reason	11	7
Don't Know	4	7
Nothing	7	19

Base: Those who had not fished in the last 2 years, but had fished in the last 10 years and were very, fairly or not very interested in fishing again in the future.

NB: The statements shown to the youth sample were phrased differently to the adult sample to increase understanding.

Having someone to go with was again a key factor that may encourage young people to go fishing. Knowledge of local places to fish, paying less money for the fishing licence, facilities at the fishing sites, greater involvement in fishing amongst the public and more fish in the rivers were also frequently mentioned factors. Greater appreciation and involvement in fishing generally amongst the public was more important to the younger age groups than adults. This may reflect greater inexperience amongst the young and a need to draw upon a greater pool of knowledge and possibly the need to be associated with an activity that has "credibility" amongst their peers.

In 2005 there was a general increase in the proportion responding to each statement. The reasons for this are unclear as the questions were asked in a similar way.

Although not significant paying less money for the licence fee did however appear higher up the list of factors in 2005 compared to 2001.

A chi-squared test did not show any difference between the 2001 and 2005 results (chi-sq = 13.325, DF = 13, P-value = 0.423)

Interestingly the price of a junior licence has actually been reduced since the previous survey. Prior to the 2001 survey the concessionary licence, which included juniors cost £9.50. Just after the 2001 survey the junior licence fee was virtually halved to £5.00. At the time of this survey the junior licence was still £5.00. The cost of the junior licence fee may not be the main reason for an increase in criticism of the fees. There is potentially some confusion with the cost of fishing permits.

Table 26 - Reasons for wanting someone to go with

	Total sample 2005	Youth Sample 2005
Base	51	19
	%	%
For company	71	60
Because you need someone to show you how to fish	22	27
Because you need someone to take you there	7	13
Other	1	0

Base: Only those who indicated that having someone to go with would encourage them to go fishing again

Amongst the lapsed anglers within the total sample and youth sample the main reason for needing someone to go fishing with was for company. Few needed someone to provide transport to the site. The social aspect of fishing is clearly evident.

Table 27 - Factors that would encourage those who had not been fishing in the last 10 years to go fishing in the future

Q5 Which of the following would be likely to persuade you to go fishing in the future? 12+yrs			
	2005	2001	1997
Base	330	286	61
	%	%	%
Someone to go with	40	38	75
Information on how to fish	19	19	67
Places to fish AND take children	18	20	16
Greater awareness of local fishing sites	13	15	62
Easier use of local fishing ponds/lakes etc.	13	10	36
Ability to borrow/hire tackle	10	15	54
A special introductory offer on the licence fee	10	10	51
Information on what equipment is needed	9	8	49
Higher profile generally of fishing amongst the public	8	7	25
Greater awareness of local fishing clubs	7	9	43
Better facilities for anglers at each watercourse	7	5	26
Ability to buy a licence from more places	7	4	20
Promotion of the fishing season	6	6	28
Improved fish stocks	6	5	20
Don't Know	2	3	0
None of these	28	27	0

Base: 2005, those who had not fished in the last 10 years and were very, fairly or not very interested in fishing in the future. NB: the 1997 base only includes people who were very or fairly interested in going fishing. The 1997 study was conducted by telephone and not face to face as in 2005. It is likely that this difference in survey method has resulted in a greater response to each factor.

Again having someone to go with was a key factor that may encourage someone to go fishing. Places to fish and take children and knowledge of how to fish were also key factors, followed by knowledge of and easier use of places to fish that are close to home.

The 2001 and 2005 results were very similar as supported by a chi squared test. (chi-sq 11.986, DF = 15, P-value = 0.680.)

Having someone to go with, knowledge of places to fish locally and information on how to fish were the most frequently mentioned responses in 1997. The relative importance of somewhere to fish and take children had increased substantially between 1997 and 2001.

Table 28 – Youth sample - factors that would encourage you to go fishing in the future

Q5 Which of the following would be likely to persuade you to go fishing in the future? 12-16yrs		
	2005	2001
Base	132	91
	%	%
Having someone to go with	48	39
Information on how to fish	33	31
Paying less money for the fishing licence	24	12
Knowing places to fish that are close to home	21	29
If it was easier to use fishing ponds or lakes near to home	20	16
If more people were involved in fishing and knew more about it	18	19
Having things like toilets and snack bars at the places you go fishing	17	18
Being able to borrow or hire fishing tackle	17	13
Information on what equipment is needed to go fishing	16	13
More fish in the river or lakes	16	11
Knowing when the fishing season starts and finishes	13	12
Knowing about fishing clubs that are near to home	13	15
Places to fish AND take children	12	13
Being able to buy a licence from more places	11	3
Don't Know	4	4
None of these	18	18

Base: Those who had not fished in the last 10 years and were very, fairly or not very interested in fishing in the future.

Amongst the 12-16 year olds, those who had not been fishing in the last 10 years were again most likely to be encouraged to fish by someone to go with. Information on how to fish was the next most common response followed by paying less money for the fishing licence, knowledge of local places to fish and easier use of local fishing ponds and lakes.

Once again since 2001 there has been an increase in the proportion of 12-16yr olds who feel paying less money for the licence would encourage them to go fishing.

A chi-squared test shows no overall difference in the 2001 and 2005 results (chi-sq = 12.495, DF = 15, P-value = 0.641).

Table 29 - Reasons for wanting someone to go with

	Total sample 2005	Youth sample 2005
Base	131	63
	%	%
For company	45	41
Because you need someone to show you how to fish	44	39
Because you need someone to take you there	9	20
Don't know	2	1

Base: Only those who indicated that having someone to go with would encourage them to go fishing

Amongst those non-anglers who suggested someone to go with would encourage them to go fishing, the need for company and a desire to be shown how to fish were equally important. This is in contrast to the response from anglers who had fished before, where 77% wanted someone to go with them for company and only 22% needed someone to show them how to fish. The need to provide some form of instruction to new anglers is therefore critical.

4.10 Sea Angling

7% of the total sample and thus 7% of the population of England and Wales aged 12yrs+ had been sea fishing in the last 2 years. This compares to 8% of the population who had been freshwater angling.

2005 was the first year this question was included in the study.

Based on a population aged 12 and over in England and Wales of 44,254,462 the number of people aged 12 and over who had been sea angling is 3 million.

Figure 11 - Profile of current sea anglers

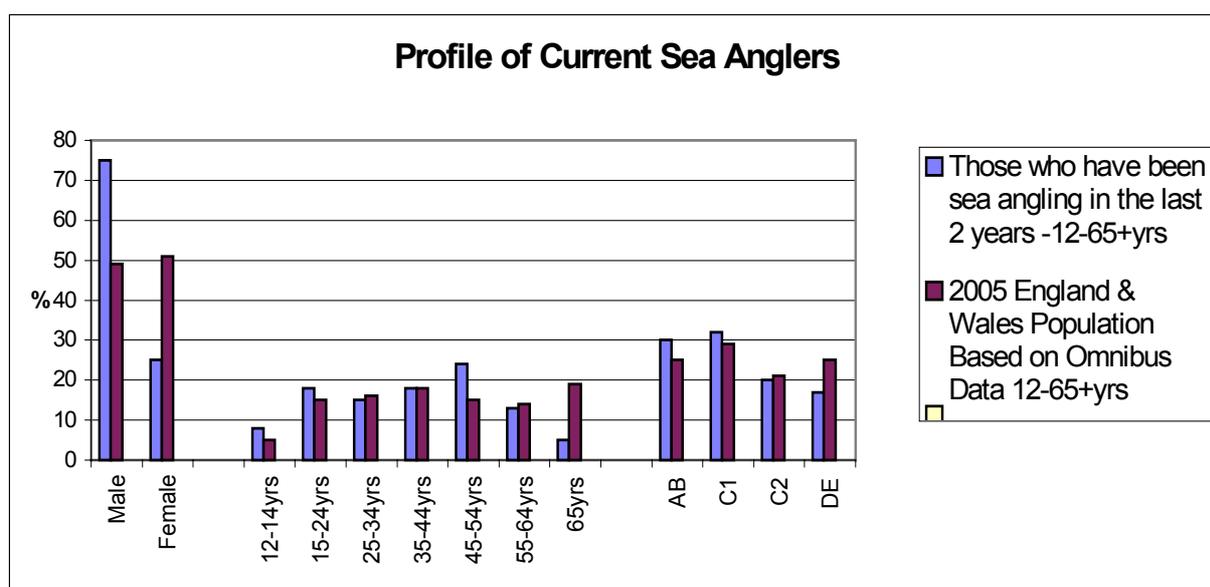


Table 30 – Demographic profile of current sea anglers

	Total Omnibus Sample	Those who had been sea angling in the last 2 years	Those who have been freshwater fishing in the last 2 years	Rod Licence Holders 2000/2001
PROFILE OF ANGLERS	2005 12-65+yrs	2005 12-65+yrs	2005 12-65+ yrs	2001
Base	2258	165	188	2600
SEX	%	%	%	%
Male	49	75	71	95
Female	51	25	29	5
AGE				
12-14yrs	5	8	13	7
15-24yrs	15	18	23	10
25-34yrs	16	15	16	13
35-44yrs	18	18	18	20
45-54yrs	15	24	16	20
55-64yrs	14	13	7	15
65yrs	19	5	6	15
SOCIAL GRADE				
AB	25	30	26	15
C1	29	32	28	25
C2	21	20	23	38
DE	25	17	22	22

NB: Rod licence holders data - actual age groups for the younger respondents used within the study were 12-16yrs and 17-24yrs.

The sea anglers have a similar male bias to the freshwater anglers, but a slightly older age profile (significant difference between 45+yrs sea and freshwater anglers at the 95% level). Although individual differences are not significant the social grade profile of the sea anglers appeared to have a more ABC1 bias than the freshwater anglers.

Table 31 – Regional profile of current sea anglers

	Total Omnibus Sample	Those who have been sea angling in the last 2 years	Those who have been freshwater fishing in the last 2 years
Region of Residence	2005 12-65+yrs	2005 12-65+yrs	2005 12-65+yrs
Base	2258	165	188
	%	%	%
London	14	10	9
South East	22	26	27
South West	10	16	9
Wales	4	3	3
East Anglia	4	4	9
East Midlands	7	5	7
West Midlands	11	9	15
Yorks/Humber	9	11	7
North West	14	8	9
North	5	8	5

Interestingly the regional profile of sea anglers was not dissimilar to regional profile of freshwater anglers with the exception of a significantly higher (95% level) proportion of sea anglers in the South West.

Table 32 - Ethnic profile of current sea anglers

Ethnic Origin	Total Omnibus Sample	Those who have been sea angling in the last 2 years	Those who have been freshwater fishing in the last 2 years	England and Wales population
	2005 12-65+yrs	2005 12-65+yrs	2005 12-65+yrs	2001 census
Base	2258	165	188	
	%	%	%	%
White	89	90	94	91
Asian	4	2	3	4
African/Caribbean	2	1	0	2

Sea anglers were predominantly white, in line with the profile of freshwater anglers and the England and Wales population.

4.11 Recent Sea Anglers

A question was included within the study to determine the proportion of the population who had been sea angling in the last year.

The results show that 4.6% of the total population have been sea angling in the last year. Based on an England and Wales 12+ population of 44,254,462 this suggests that approximately 2 million people had been sea angling in the last year.

This compares to 7% of the total sample who had been sea angling in the last 2 years.

62% of sea anglers who had fished in the last 2 years had also fished in the last year. 38% of those who had fished in the last 2 years had not however fished in the last year.

Table 33 – Demographic profile of recent sea anglers

	Total Omnibus Sample	Those who have been sea angling in the last year	Those who have been sea angling in the last 2 years	Rod Licence Holders 2000/2001
PROFILE OF ANGLERS	2005 12-65+yrs	2005 12-65+yrs	2005 12-65+ yrs	2001
Base	2258	103	165	2600
SEX	%	%	%	%
Male	49	77	75	95
Female	51	23	25	5
AGE				
12-14yrs	5	9	8	7
15-24yrs	15	17	18	10
25-34yrs	16	18	15	13
35-44yrs	18	17	18	20
45-54yrs	15	22	24	20
55-64yrs	14	11	13	15
65yrs	19	6	5	15
SOCIAL GRADE				
AB	25	35	30	15
C1	29	31	32	25
C2	21	19	20	38
DE	25	15	17	22

NB: Rod licence holders data - actual age groups for the younger respondents used within the study were 12-16yrs and 17-24yrs.

The profile of the recent and current sea anglers was very similar.

4.12 Youth Sea Anglers

11% of the total sample of 12-16yr olds had been sea angling in the last 2 years, whilst 7% of the total youth sample had been sea angling in the last year.

65% of the youth sea anglers who had fished in the last 2 years had been sea angling in the last year, whilst the remaining 35% had not been sea angling in the last year.

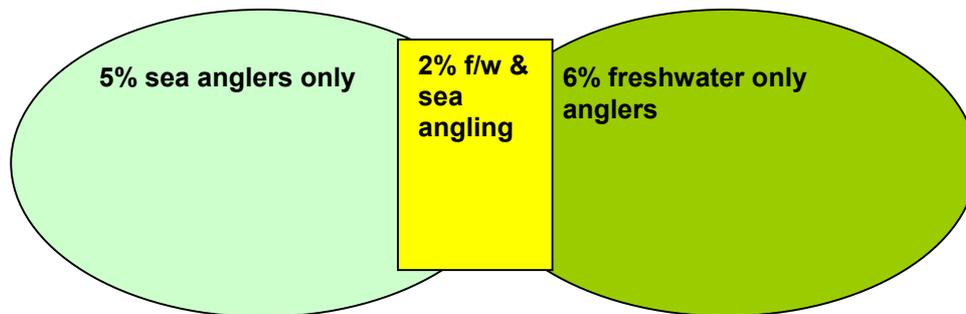
4.13 Overlap Between Current Freshwater and Current Sea Anglers

135 respondents (6%) in the total omnibus sample had been freshwater fishing in the last 2 years, but had not been sea angling.

112 respondents (5%) in the total omnibus sample had been sea angling in the last 2 years but had not been freshwater fishing.

53 respondents (2%) had actually been both freshwater and sea angling in the last 2 years.

Figure 12 - Overlap between current freshwater and sea anglers



Base: 2258

Based on an England and Wales 12yrs+ population of 44,254,462 this would suggest that there are,

- 5.8 m people who have been angling in the last 2 years of whom;
- 2.6 million people have been freshwater fishing, but have not been sea angling in the last 2 years;
- 1m people have been both freshwater and sea angling in the last 2 years; and
- 2.2 million people go sea angling, but have not been freshwater angling in the last 2 years.

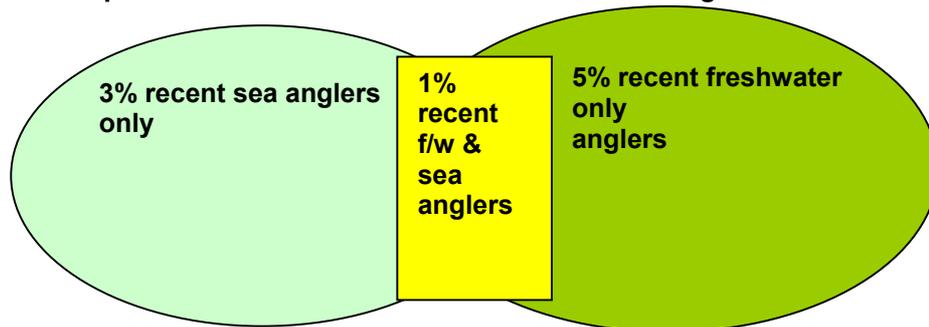
4.14 Overlap Between Recent Freshwater and Recent Sea Anglers

111 respondents (5%) in the total omnibus sample had been freshwater fishing in the last year, but had not been sea angling in the last year.

78 respondents (3%) in the total omnibus sample had been sea angling in the last year, but had not been freshwater angling in the last year.

25 respondents (1%) had actually been both freshwater and sea angling in the last year.

Figure 13 - Overlap between recent freshwater and recent sea anglers



Base 2258

4.2 million people aged 12+ within the England and Wales population had been angling in the last year of whom,

- 2.2 million people have been freshwater fishing in the last year, but have not been sea angling in the last year;
- 490,000 people have been both freshwater and sea angling in the last year; and
- 1.5 million people have been sea angling in the last year, but have not been freshwater angling in the last year.

5. Conclusions and Recommendations

Attitudes to Angling

- Attitudes to angling are overall still generally positive, with an improvement in some areas such as “anglers care for the environment” and “angling fits in well with other activities such as walking and cycling”
- Young people (12-16yr olds) are less clear in their views, but are more likely to have positive rather than negative perceptions of angling, however they are likely to be less positive overall than adults and less positive than in 2001. Perhaps as a function of age and knowledge young people are less clear in their views than the population as a whole and this uncertainty has increased since 2001.

Overall angling participation

- 13% of the population over 12 said they had been fishing (freshwater and/or sea) in the last 2 years (5.8 million people).
- 9% of the population over 12 (4.2 million people) had been fishing (freshwater and/or sea) in the last year.

Freshwater Angling Participation in England & Wales

- The level of interest in freshwater angling remains high, although participation has not increased since 2001.
- Of the 44 million people in England and Wales over 12,
 - 20% 8.8 million, had been freshwater fishing in the last 10 years
 - 8%, 3.5 million in the last 2 years; and
 - 6%, 2.6 million in the last year.
- The results show little evidence of success to promote participation amongst the young. Interest remains high, but participation has not increased since 2001. The proportion who had never been fishing before had increased from 79% to 86% since 2001. Junior licence sales have in fact fallen in 2004. The results within this report, together with previous research findings, may be useful in supporting the Angling Development Strategy.
- The results suggest high rates of loss and recruitment in angling. Of those who had been fishing in the past ten years but not in the last two years, 34% (about 1.7 m) were interested in going again.
- The number of people who said they had been freshwater fishing in the last year is greatly in excess of the million who bought a licence in 2004/5.
- Possible reasons for the discrepancy include:
 - (i) high evasion levels amongst anglers who fish infrequently; and
 - (ii) ‘going fishing’ might mean accompanying an angler rather than personally fishing.
- There appears to be substantial numbers of females, 12-24yr olds and AB social grades who indicate they have been freshwater fishing but have not purchased a rod licence.
- Having someone to go with was the key factor that would encourage lapsed and new anglers to go fishing. Information on how to fish was also important for new anglers. Those who gave “having someone to go with” as a response were asked to indicate which statement best described the reason for this. The desire for company was of particular importance to the lapsed anglers, whilst company and being shown how to fish were of equal importance to the new anglers. This highlights the need to instruct new anglers and emphasises the importance of the social aspect of angling.

Sea angling

- 7% of the population over 12 said they had been sea fishing in the last 2 years.
- 13% of the population over 12 said they had been freshwater or sea fishing in the last 2 years (5.8 million people).

- 4.6% of the population over 12 said they had been sea fishing in the last year (2 million people). This compares to the Drew Associates estimate of 1.5 million for all ages in 2003.
- Of the 2.6 million people who had been freshwater fishing in the past year, 18% (half a million) had also been sea fishing in the past year.
- 1.5 million people had been sea fishing in the past year but not freshwater fishing.
- The ratio of rod licence holders to those who say they have been freshwater fishing in the past year is 2:5.
- If similar ratios could be obtained for a potential sea angling licence (exclusive of freshwater angling), there would be about 800k licensed sea anglers each year, buying about 1 million licences.

Appendix 1 Questionnaires

Adult Questionnaire

Row The Boat Ashore - FINAL QUESTIONNAIRE

H463 - JN: 45103297 - 01 Mar 2005

Quanquest v2.1 - QAL v2.2bmr13 - CAPI

H463

INTERVIEWER PLEASE SHOW SCREEN UNTIL OTHERWISE INSTRUCTED

1. Have you been freshwater fishing in the last 2 years, by freshwater fishing I mean fishing inland and not in the sea.

Yes	1	(108)
No	2	
Don't Know	Y	

**IF 1 = Yes
THEN ASK: 2
ELSE ASK: 3, 4**

2. And have you been freshwater fishing in the last year?

Yes	1	(109)
No	2	
Don't Know	Y	

3. How many times have you been freshwater fishing in the last 10 years?

Never	1	(110)
1-2 times	2	
3 or more times	3	
Don't Know	Y	

4. How interested would you be in going freshwater fishing in the future?

Very Interested	1	(111)
Fairly Interested	2	
Not very interested	3	
Not at all interested	4	
Don't Know	Y	

IF ((3 = 1-2 times OR 3 = 3 or more times) AND (4 = Very Interested OR 4 = Fairly Interested OR 4 = Not very interested))
 THEN ASK: 5

5. And which of these factors would encourage you to go fishing again? (please pick as many as apply)

Greater awareness of local fishing sites	1	(112)
Greater awareness of local fishing clubs	2	
Reduction in licence fees	3	
Ability to buy a licence from more places	4	
Improved fish stocks	5	
Promotion of the fishing season	6	
Better facilities for anglers at each watercourse	7	
Higher profile of fishing generally amongst the public	8	
Easier use of local fishing ponds/ lakes etc.	9	
Ability to borrow/ hire tackle	0	(113)
Someone to go with	1	
Places to fish AND take children	2	
Other	3	
Don't Know	Y	(112)
Nothing	X	

IF 5 = Someone to go with
THEN ASK: 6

6. Which of these statements best describes why you would like someone to go with?

Because you need someone to take you there	1	(114)
Because you need someone to show you how to fish	2	
For company	3	
Don't Know	Y	
Other	0	

Other specify...

(115 - 118)

End of Filter I463C

End of Filter I463B

IF ((3 = Never) AND (4 = Very Interested OR 4 = Fairly Interested OR 4 = Not very interested))
THEN ASK: 7

7. Which of the following would be likely to persuade you to go fishing in the future? (please pick as many as apply)

Greater awareness of local fishing sites	1	(119)
Greater awareness of local fishing clubs	2	
A special introductory offer on the licence fee	3	
Ability to buy a licence from more places	4	
Information on how to fish	5	
Information on what equipment is needed	6	
Easier use of local fishing ponds/ lakes etc.	7	
Promotion of the fishing season	8	
Higher profile generally of fishing amongst the public	9	
Better facilities for anglers at each water coarse	0	(120)
Improved fish stocks	1	
Someone to go with	2	
Ability to borrow/ hire tackle	3	
Places to fish AND take children	4	
Don't Know	Y	(119)
None of these	X	

**IF 7 = Someone to go with
THEN ASK: 8**

8. Which of these statements best describes why you would like someone to go with?

Because you need someone to take you there	1	(121)
Because you need someone to show you how to fish	2	
For company	3	
Don't Know	Y	
Other	0	

Other specify...

(122 - 125)

End of Filter I463F

End of Filter I463E

End of Filter I463A

I would like you to consider a number of statements about angling and tell me how much you agree or disagree with each.

9. How much do you agree or disagree that ...?

Agree Strongly	1	(126)
Agree Slightly	2	
Neither Agree nor disagree	3	
Disagree Slightly	4	
Disagree Strongly	5	
Don't Know	Y	

This question is repeated for the following loop values:

- Angling is an acceptable pastime
- Angling activity suggests that the water quality of the river or lake is good
- Anglers care for the environment
- Angling fits in well with other activities such as boating and walking or cycling along the river bank
- Angling is a cruel pastime

A total of 5 iterations occupying columns (126) to (130)

10. Have you been sea angling in the last 2 years?

Yes	1	(131)
No	2	
Don't Know	Y	

IF 10 = Yes
THEN ASK: 11

11. And have you been sea angling in the last year?

Yes	1	(132)
No	2	
Don't Know	Y	

End of Filter I463D

Row The Boat Ashore Youth - FINAL QUESTIONNAIRE

H463Y - JN: 45103297 - 01 Mar 2005
Quanquest v2.1 - QAL v2.2bmr13 - CAPI

H463Y

INTERVIEWER PLEASE SHOW SCREEN UNTIL OTHERWISE INSTRUCTED

1. Have you been freshwater fishing in the last 2 years, by freshwater fishing I mean fishing inland and not in the sea.

Yes	1	(108)
No	2	
Don't Know	Y	

**IF 1 = Yes
THEN ASK: 2
ELSE ASK: 3, 4**

2. And have you been freshwater fishing in the last year?

Yes	1	(109)
No	2	
Don't Know	Y	

3. How many times have you been freshwater fishing in the last 10 years?

Never	1	(110)
1-2 times	2	
3 or more times	3	
Don't Know	Y	

4. How interested would you be in going freshwater fishing in the future?

Very Interested	1	(111)
Fairly Interested	2	
Not very interested	3	
Not at all interested	4	
Don't Know	Y	

IF ((3 = 1-2 times OR 3 = 3 or more times) AND (4 = Very Interested OR 4 = Fairly Interested OR 4 = Not very interested))
 THEN ASK: 5

5. And which of these factors would encourage you to go fishing again? (please pick as many as apply)

Knowing places to fish that are close to home	1	(112)
Knowing about fishing clubs that are near to home	2	
Paying less money for the fishing licence	3	
Being able to buy a licence from more places	4	
More fish in the rivers or lakes	5	
Knowing when the fishing season starts and finishes	6	
Having things like toilets and snack bars at the places you go fishing	7	
If more people were involved in fishing and knew more about it	8	
If it was easier to use fishing ponds or lakes near to home	9	
Being able to borrow or hire fishing tackle	0	(113)
Having someone to go with	1	
Places to fish AND take children	2	
Other	3	
Don't Know	Y	(112)
Nothing	X	

IF 5 = Having someone to go with
 THEN ASK: 6

6. Which of these statements best describes why you would like someone to go with?

Because you need someone to take you there	1	(114)
Because you need someone to show you how to fish	2	
For company	3	
Don't Know	Y	
Other	0	

Other specify...

(115 - 118)

End of Filter I463CY

End of Filter I463BY

**IF ((3 = Never) AND (4 = Very Interested OR 4 = Fairly Interested OR 4 = Not very interested))
THEN ASK: 7**

7. Which of the following would be likely to persuade you to go fishing in the future? (please pick as many as apply)

Knowing places to fish that are close to home	1	(119)
Knowing about fishing clubs that are near to home	2	
Paying less money for the fishing licence	3	
Being able to buy a licence from more places	4	
Information on how to fish	5	
Information on what equipment is needed to go fishing	6	
If it was easier to use fishing ponds or lakes near to home	7	
Knowing when the fishing season starts and finishes	8	
If more people were involved in fishing and knew more about it	9	
Having things like toilets and snack bars at the places you go fishing	0	(120)
More fish in the rivers or lakes	1	
Having someone to go with	2	
Being able to borrow or hire fishing tackle	3	
Places to fish AND take children	4	
Don't Know	Y	(119)
None of these	X	

**IF 7 = Having someone to go with
THEN ASK: 8**

8. Which of these statements best describes why you would like someone to go with?

Because you need someone to take you there	1	(121)
Because you need someone to show you how to fish	2	
For company	3	
Don't Know	Y	
Other	0	

Other specify...

(122 - 125)

End of Filter I463FY

End of Filter I463EY

End of Filter I463AY

I would like you to listen to some sentences about angling, by angling I mean fishing with a rod and line, and I would like you to tell me how much you agree or disagree with each of them.

9. How much do you agree or disagree that &O463A&?

Agree a lot	1	(126)
Agree a little	2	
Neither Agree nor disagree	3	
Disagree a little	4	
Disagree a lot	5	
Don't Know	Y	

This question is repeated for the following loop values:

- Angling is an ok thing to do
- If you see someone angling you would think that the water in the river or lake is clean
- Anglers care for the environment
- Angling goes well with things like boating and walking or cycling along the river bank
- Angling is cruel

A total of 5 iterations occupying columns (126) to (130)

10. Have you been sea angling in the last 2 years?

Yes	1	(131)
No	2	
Don't Know	Y	

IF Q463A8 = Yes
THEN ASK: 11

11. And have you been sea angling in the last year?

Yes	1	(132)
No	2	
Don't Know	Y	

End of Filter I463DY

References

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