

Angling Trust Insight Research

Summary Report



substance.



March 2016

Dr. Adam Brown

With:
Greg Dash
James Harrison
Shileen Tarpey

Background to the Project

This is a summary of findings from the Angling Trust Insight Research Project commissioned by the Angling Trust and undertaken by research company, Substance. The project ran from July to December 2015.

The research is focused on England only and provides new insight into current and potential future participation in angling. It has been conducted to inform the Angling Trust's development strategies over the next few years.

This is a summary report of key findings. A Final Report with detailed findings and a series of survey reports have been provided to the Angling Trust.

Research Undertaken

The research involved a multi-faceted, multi-method approach, including:

- A representative population-level omnibus survey of 1,780 adults in England
- A representative omnibus survey of 400 young people (11-16) in England
- An online survey of 11,000 anglers, including current and lapsed anglers
- Two supplementary online surveys of adult sports participants and young anglers
- Qualitative research involving semi-structured interviews with anglers and non-anglers and a focus group with non-anglers.

1780

A representative omnibus survey of **1,780** adults in England.

11000

An online survey of **11,000** anglers, including current and lapsed anglers.

01 The Angling 'Market Potential'

Market size

From the population level study it was found that:

- **One third of the adult population** of England have tried some form of angling at least once in their lives, including 45% of males and 21% of females.
- **5% of the adult population of England had been angling** in some form, at least once in 2014 or 2015. This included 8% of all adult males and 2% of adult females.
- **This represents c. 2,015,009 adults in England who have been angling in the last two years.**
- Amongst 11-16 year old young people, the proportions were higher. It is likely that there is less accuracy in the figures for young people than for the adult population. The survey indicated that:
 - 44% of young people in England having been angling at least once.
 - 24% of 11-16 year olds said that they had been angling at least once in 2014 or 2015.
- Of those who have tried angling, around half have some interest in **doing it again.**

In our angler survey, nearly 50% of respondents (both lapsed and current anglers) knew others who were interested in trying angling. Between one fifth and a quarter of respondents said that they had friends interested in angling.

1/3

of the adult population of England have tried angling at least once in their lives, including 45% of males and 21% of females.

5%

of the adult population had been angling in some form, at least once in 2014 or 2015.

01 The Angling 'Market Potential'

Increasing Frequency

From the online survey of 10,360 anglers we found that 89% would like to go angling more often.

- 34.1% would like to go **more than 50% more often**.
- 56.6% would like to go between 11% and 50% more often.

Given that 50% expected that they would be able to increase frequency, this represents a very significant potential to increase participation.

The most significant obstacles for those who did not expect to increase frequency were:

- Time for family (39.3%)
- Time for work/education (38.4%)
- Weather conditions (16.1%)
- Cost (16.7%)

Overcoming unsuitable weather is difficult to achieve – but creating **local access** and provision that takes account of work and/or family pressures **could be ways of addressing these known barriers**.

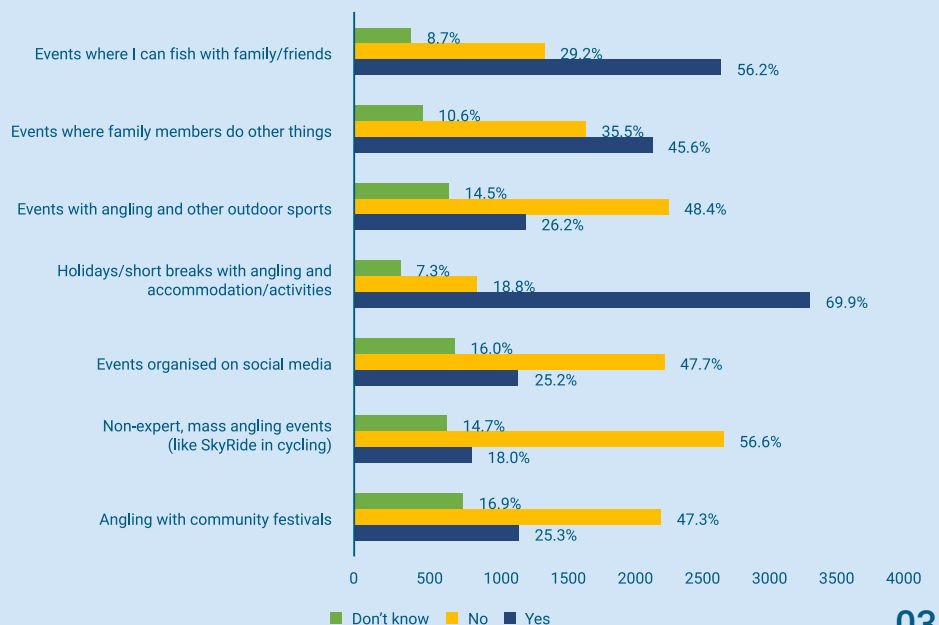
'I always fished local and in areas that I knew for cost reasons. The nearest place I can fish is about 5 miles away.'

In terms of types of events to encourage more frequent angling:

- 70% of current anglers said that combining angling with short breaks and other activities would encourage them.
- 56% said that events where they can fish with family and friends would encourage them.
- 45.6% said that events where family can do other things would encourage them.

Type of events to increase frequency (current anglers)

'tick all' option so does not sum to 100.



01 The Angling 'Market Potential'

70%

70% said that angling provision with short breaks and other activities would encourage them to go more often.

56%

56% said that events where they can fish with friends and family would encourage them to go more often.

01 The Angling 'Market Potential'

Getting people started

Of the 66% of adults who have never been angling, **88% of them said that they had 'never even considered' doing it.** This suggests that to increase the numbers of people who might contemplate going angling, some significant **awareness raising** is required.

Participants in **other outdoor sports** – notably cycling/mountain biking and walking/mountain climbing – may be the most likely market to respond. Stressing relaxation and getting away from it rather than hi-octane excitement is more likely to **motivate these people.**

Some non-anglers' perception of angling is that it is male, sedentary and based around catch and release competitions. **Promoting healthy lifestyles**, getting 'away from it' into pleasant or exciting (rural or coastal) environments, and easy access to information and guidance are most likely to succeed.

For **current anglers**, starting early in life was very important:

- 61% of current anglers started before they were 10 years old
- 21% started when they were 11-15 years old
- Only 11.4% of all anglers started fishing when they were over 30

As such, to ensure future participation, targeting young people – and sometimes very young people – will be critical.

61%

61% of current anglers started before they were 10 years old.

11.4%

Only 11.4% of current anglers started after the age of 30.

01 The Angling 'Market Potential'

Getting people back

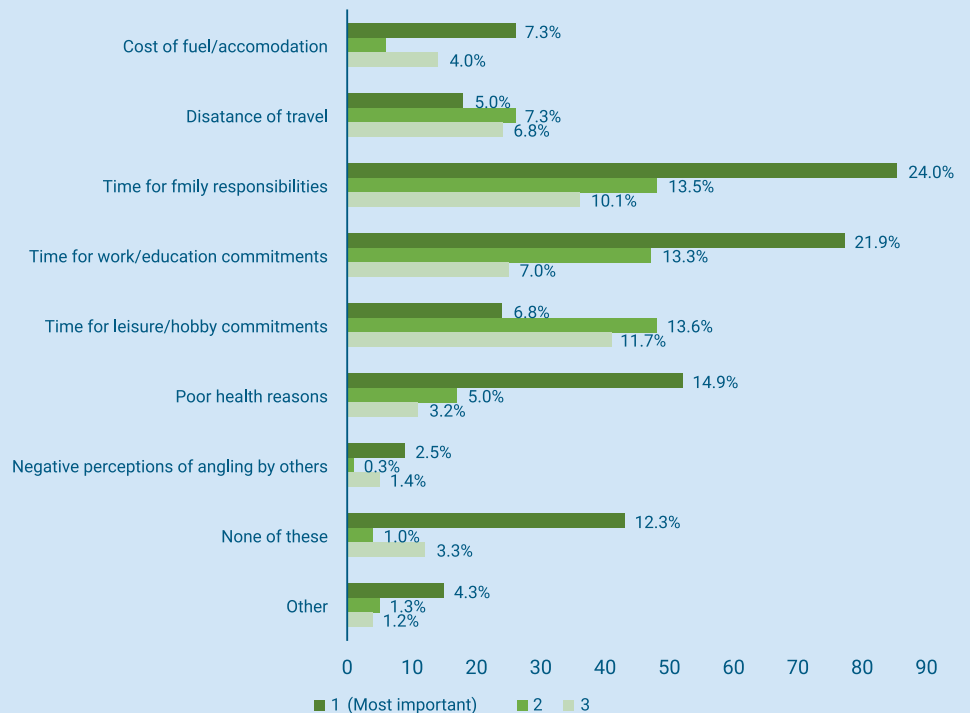
The one third of the adult population who had been angling at some stage, but had not been in the last two years ('lapsed anglers'), were split almost exactly half and half as to whether they wanted to **go angling again**.

In our population level study, 'getting out of the habit' was by far the biggest factor in anglers **not going**, with 55.4% saying this was a factor. In our angler survey, 'time for family' (24% 'most important') and 'time for work' (22% 'most important') were by far the biggest reasons for anglers stopping fishing. Poor health was also important with 14.9% saying this was the most important reason (which may reflect the higher number of lapsed anglers who have a disability or impairment).

Finding ways to overcome these barriers will be important in realising the market potential for attracting lapsed anglers back to angling. Our survey of lapsed anglers said that the following would be most likely to be successful:

- Combining angling with other outdoor sports: 33.4% said that this would be very likely to encourage them to go angling more often.
- Social media to find people and places was the next highest first preference (24.4%).

Non-angling related reasons for lapsing (lapsed anglers)



01 The Angling 'Market Potential'

33.4%

33.4% said that combining angling with other outdoor sports would encourage them back to angling.

24.4%

24.4% said that using social media to find people to fish with and places to fish would encourage them back to angling.

02 Measuring Participation

Our understanding of the patterns of angling participation suggests that **simple measures of frequency of activity per week or month are unlikely to capture the true level of participation** amongst anglers. Angling participation is:

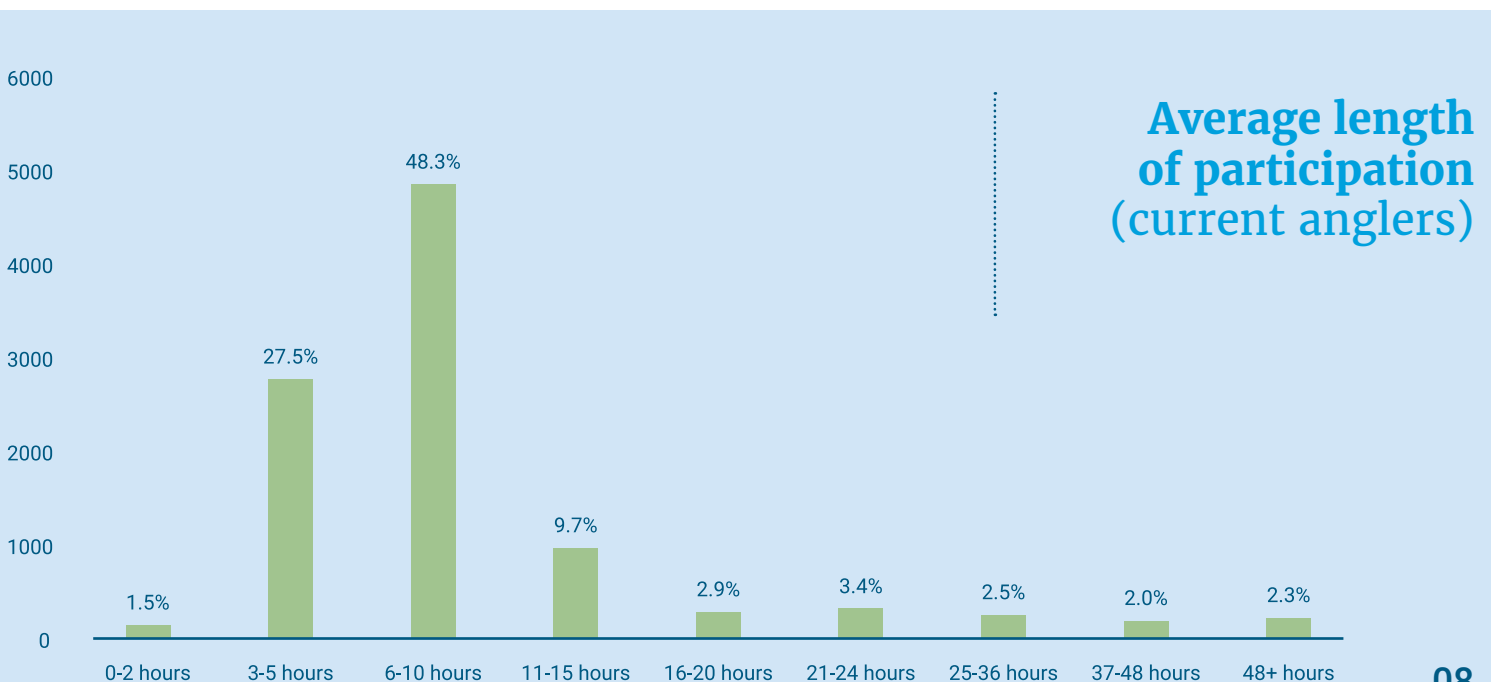
- **Very varied and irregular** - 56% of respondents fished for under 30 days a year, with one fifth fishing for between 1 and 10 days a year. However, one third (33.3%) go angling more than 40 times a year.
- **Sporadic and episodic** – 33.5% of anglers fish once or twice per month in relevant seasons; 14.8% fish rarely or occasionally.
- Often of **long duration** - 48.3% fish for between 6 and 10 hours on average per session and 22.8% for longer than that.
- Based on **seasonal variances**, of weather, fish availability and closed seasons, with weather being the biggest single reason people don't fish in some seasons (33.5% citing this reason).

Lifestyle factors such as being on holiday can be a focus for participation for some people - 7.4% of our sample fished only in concentrated holiday periods.

'Our fishing is normally seasonal from spring time to autumn and we tend to combine it with camping holidays for a week at a time. If the weather is good at such a time we just do it and this will be for the whole day.'
(current angler)

Some of these aspects of angling **make it very distinct from many other sports and leisure activities** – in particular that variances in the weather, sometimes quite marginal, can prevent people from participating; and that the availability of fish is seasonal.

As such **annual or seasonal measurement** of angling participation needs to take these factors into account. Monthly participation is likely to be very low at some times of the year; and **a person's annual participation may be high overall, but concentrated into a few, high participation days or weeks, with long sessions.**



03 Responding to the new Government sports strategy

The new Government sports strategy, **Sporting Futures**, sets out five outcome areas along with measures by which the delivery of that strategy will be assessed. These are:

- i. **Physical health**
- ii. **Mental well-being**
- iii. **Individual development**
- iv. **Social and community development**
- v. **Economic development**

This provides a very relevant context for the findings of this research, particularly in relation to physical health and mental well-being.

Physical Health

The change in emphasis from a focus solely on 'formal' or 'competitive' sports participation towards 'active lifestyles' is something that angling can help deliver. This is particularly so in relation to the focus in the strategy on outdoor recreation as a way of achieving this.

The move towards an assessment of physical activity of twice per month and of getting more people active who are inactive are both more sympathetic to angling participation in relation to its longer but more episodic participation patterns.

The strategic importance of getting younger people in age brackets from 5 upwards is something that angling can focus on and will deliver benefits given the very young age that anglers in this survey first participated in angling.

The importance of keeping people active into older age is also something that angling can help contribute to as it is an activity that people can go on participating in through middle to old age: of those completing our angler survey 50% were over 45 and 22% over 55.

Angling attracts higher than average numbers of disabled people - 26.9% of lapsed anglers and 13.8% of current anglers had a 'long term illness, health problem or impairment that limits their daily activity'. Specific online information from fisheries, and facility improvements such as car parking closer by or basic food and toilet facilities will encourage participation:

'[I would like] better information for people with disabilities.... access should be made easier for setting up / packing up equipment as generally car parks are not near pegs.'

48.3%

48.3% fish
between 6-10
hours per session
on average.

33.3%

33.3% fish
more than 40
times a year.

03 Responding to the new Government sports strategy

Physical Health

26.9%

26.9% of lapsed anglers and 13.8% of current anglers were disabled.

50%

50% of respondents in the angler survey were over 45.



03 Responding to the new Government sports strategy

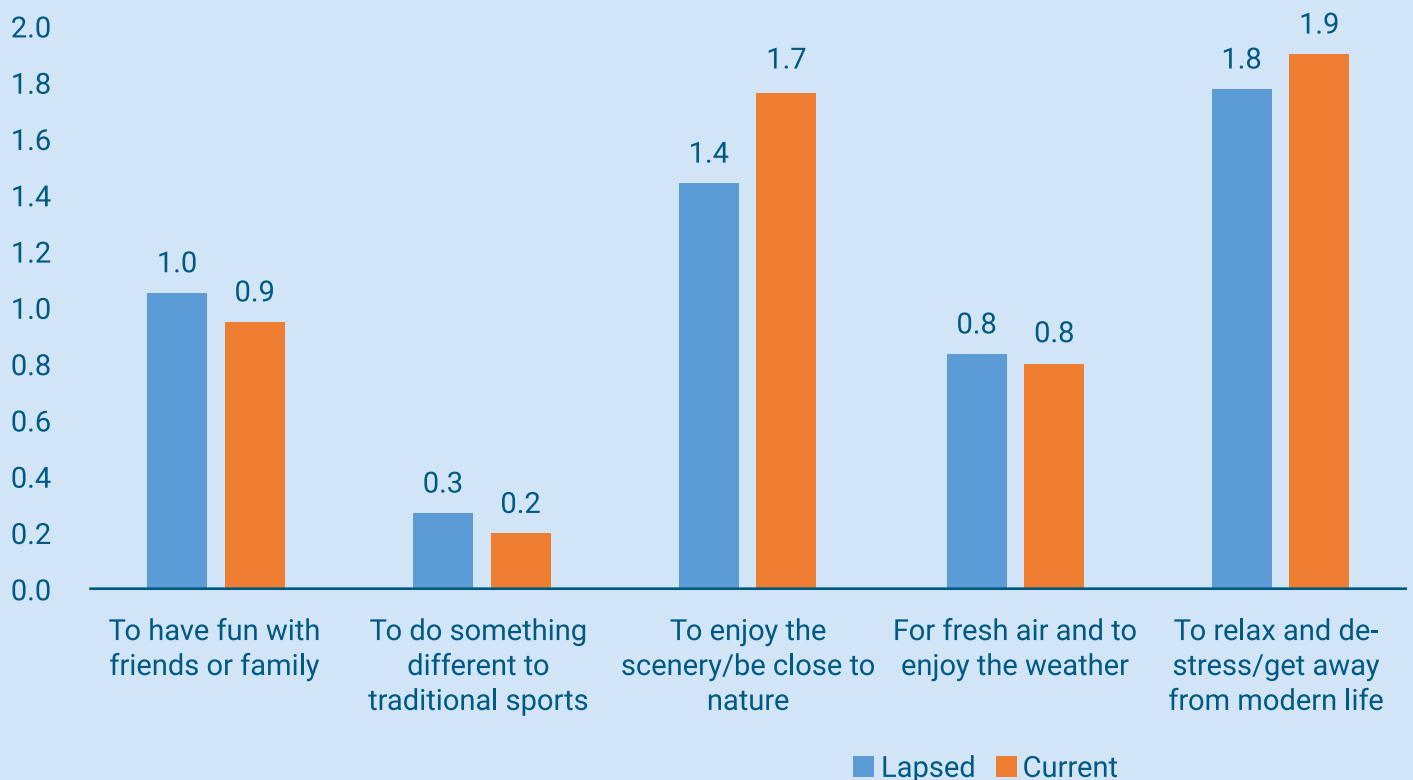
Mental Well-Being

The motivations for going angling reflect some of the key priorities in relation to the new strategy outcome of improving mental well-being:

- To **'relax and de-stress/get away from modern life'** was the highest first preference motivation for current anglers with 40.5% saying this was the most important reason they went angling.
- This was followed by **enjoying scenery and nature** (32.2% most important).

These findings are particularly important in relation to the strategy's recognition of the additional health benefits of accessing green-blue spaces and reflect findings in several previous research projects about angling participation.¹

Motivations for angling (non catch-related, rating average)



03 Responding to the new Government sports strategy

Mental Well-Being

40.5%

40.5% said to relax
and de-stress was
their most important
motivation.

32.2%

32.2% said
that enjoying
scenery and
nature was their
most important
motivation.



03 Responding to the new Government sports strategy

Other strategic outcome areas

Although not a focus of this study, there is a wealth of evidence about other areas of the Sporting Futures strategy from previous research:

- Previous research has demonstrated the impact of angling in relation to **individual development**, particularly, but not exclusively, for young people. The Angling Trust and Get Hooked on Fishing are now working on a joint evaluation framework to demonstrate this better utilising Views software.
- The strategic outcome of **social and community development** is another area where angling has a significant contribution to make.² The creation of framework funding by Sport England to support sports organisations listing local facilities as Assets of Community Value and supporting asset transfers creates a new opportunity for angling to further demonstrate this impact.³
- There is mounting evidence about the **economic value** of angling. The Angling Trust was a key stakeholder in the Sea Angling 2012 project which estimated angling's contribution to the English economy at £980 million of GVA.⁴ A recent report by the Sport and Recreation Alliance – Reconomics – highlighted angling's contribution as part of the broader contribution made by outdoor recreation to the economy.⁵

Sport England is seeking to support communities running local sports assets.

£980m

Sea angling's contribution to the English economy has been estimated at £980m GVA.

¹ Brown, A. Djohari, N. and Stolk, P. (2012) *Fishing for Answers*, Manchester: Substance pp28-39

² Djohari, N. and Brown, A. (2012) *Making the Most of Community Waters*, Manchester: Substance

³ <http://www.sportenglandclubmatters.com/club-planning/planning/facilities/community-assets-guidance>

⁴ Armstrong, M. et al (2012) *Sea Angling 2012: Final Report*, London: Defra: p1

⁵ Butler, S. and Comley, V. (2014) *Reconomics: the Economic impact of outdoor recreation*, Sport and Recreation Alliance

⁶ *Sport England Strategy Consultation*, February 2016

⁷ American Sportfishing Society (2015) *U.S. Angler Population: Who Comes and Who Goes*, http://asafishing.org/uploads/Report_1_Executive_Summary_-_U.S_Angler_Population_Who_Comes_and_Who_Goes.pdf

04 Angling Insight and Behavioural Change

With specific reference to getting people more active, Sport England has already indicated that it is likely to be investing in sports that can show how they use insight to structure their work in relation to patterns of behavioural change. Whilst the Angling Trust is undertaking further work in this area, this research provides some guidance in relation to the six stages of behavioural change identified by Sport England.

Behavioural change models and angling

i) Pre-contemplation

Much of the non-angling population falls into the 'pre-contemplation' stage (i.e. are not considering taking part): in the population level study, of the 67% of adults who have not been angling in their lives, 88% said that they had never even considered doing it.

'No-one I know does it. It's probably something you get into with your family isn't it?... Or if you've seen it on TV and you think you really want to give it a go but I never really have. (non-angler)

ii) Contemplation

In the population study, 12% of non-anglers had thought about taking part, but had not done so for a variety of reasons, most notably, knowing where to go and how to do it; and having someone to go with.

'I did quite like the idea of getting into it, it's in the countryside and I like that. Also I like the idea of the accessories that goes with it. I like the idea of being quiet and being at one with nature....' (non-angler)

iii) Preparation

For those non-anglers who are interested in taking up angling, making it easy to know what to do and access information about where to do it are the most important actions.

'I just really need to learn the basics. When I go down to the beach I can watch them angling and I get frustrated because I want to do it.' (non-angler)

Unreceptive access points – such as fisheries or shops that do not respond well to new anglers – mean that 'routes in' can be blocked and prevent preparation changing to action.

'I did visit the local angling shop and borrowed a DVD but it was useless. I also contacted the local angling club but nothing came of it.' (non-angler)

88%

Of the 66% of adults who have never been angling, 88% of them said that they had 'never even considered' doing it.

12%

12% of non-anglers had thought about taking part.

04 Angling Insight and Behavioural Change

iv) Action

In relation to transferring preparation into action, this study has particularly focused on **how to re-engage lapsed anglers** – those who might be perceived to have ‘moved backwards’ in the behavioural change model. This in itself highlights an issue with conceiving of behavioural change models as a linear, or one way process:

- The population level study showed that although 33% of adults had tried angling only 5% had taken part in the preceding two years.
- Our angler survey illustrated that **45.4% have had significant gaps in angling** and 12% had only started angling again within the last two years.
- This **high rate of ‘churn’** is something reflected in research in other countries.

Given this rate of churn, the reasons behind ‘lapsing’ and the importance of reengaging lapsed anglers is of particular importance:

- **Cost, nobody to go with, time for family and time for work** were the main reasons cited for not angling, with poor health also important.
- More competitions, opportunities to combine angling with other outdoor sports and use of social media to provide information and connections were cited as the most important ways to reengage lapsed anglers.

v) Maintenance

As noted above, **many of those who take part in angling will stop at some stage** – sometimes for long periods - maintaining participation is not a given once people have started. **As such, failure to maintain is to be expected, not considered a ‘failure’.**

However, 89% of current anglers wish to go more often. Developing ways to combine angling with other things, seem to be the most likely ways of enabling this. Combining angling with holidays and short breaks, accommodation packages, events to fish with family and friends and with other outdoor sports can encourage maintaining and increasing participation.

45.4%

45.4% of current anglers had had significant gaps (over two years) in their participation.

89%

89% of current anglers wanted to go more often.

04 Angling Insight and Behavioural Change

“

I did quite like the idea of getting into it, it's in the countryside and I like that.

“

I just really need to learn the basics.

04 Angling Insight and Behavioural Change

Issues with behavioural change models

It is important to emphasise that behavioural change models are just that: models. Most people do not fit easily or consistently into rigid models. The impacts of family life, work and even weather have been highlighted as key reasons why angling participation may stop (temporarily or permanently) or be limited.

The turnover of angling participation, gaps in participation, the often episodic nature of participation and the wide range of other outdoor activities undertaken by anglers lends weight to the argument that **it is often not a binary definition of being an 'angler' or a 'non angler'**. Rather, angling is something that people come into, drop out of and come back to.

This creates both an **opportunity and a challenge** for the Angling Trust:

- In terms of **opportunity**, there is a **large reservoir of people who have tried angling**, many of whom would like to try it again; and many of those who have participated in the last two years would like to do more of it.
- On the other hand it would be a mistake to expect that those that are engaged will fit into neat models of participation and will remain so.

What the Angling Trust can do

- **Raise awareness** of angling amongst those who don't even contemplate doing it and illustrate the different forms and locations it entails so that they can see people like themselves doing it.
- **Make it easier** for those who are contemplating participation to take part.
- **Address the barriers** – time, information, cost – that are faced by those who wish to return to angling.

There is a large reservoir of people who have tried angling at least once. Many of those who have participated in the last two years would like to do more angling.

Raising awareness, making it easier to do and addressing barriers are the priorities.

About the Angling Trust

The Angling Trust is the representative body for game, coarse and sea anglers in England. Our members support the campaigns and legal action we carry out to protect fish stocks and our programmes to increase the number of anglers fishing for fun and in competitions. The Angling Trust fights for the future of fishing, needs the support of anglers to do more.

Contact:

Angling Trust
Eastwood House,
6 Rainbow Street,
Leominster,
Herefordshire HR6 8DQ

Tel: 0844 7700616

Email: admin@anglingtrust.net

Web: www.anglingtrust.net

About Substance

Substance is a social research company that has led much of the research into the social and economic aspects of angling in the UK. It conducted the National Angling Survey 2012 for the Angling Trust, the Social and Community Benefits of Angling research for the Big Lottery Fund and Sea Angling 2012 and Sea Angling 2016 for Cefas and Defra.

Contact Substance:

Tel: 0161 244 5418

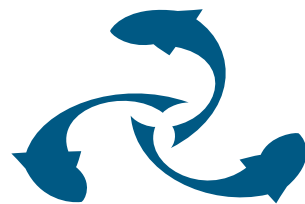
Email: info@substance.net

Web: www.substance.net

Angling Research Resources: www.resources.anglingresearch.org.uk



substance.



**ANGLING
TRUST**

substance.