

Public Attitudes Towards Angling

R&D Technical Report W2-060/TR

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Environment Agency, Rio House, Waterside Drive, Aztec West, Almondsbury,
BRISTOL, BS32 4UD.

Tel: 01454 624400 Fax: 01454 624409
Website: www.environment-agency.gov.uk

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This technical report contains the results of a study into public attitudes to angling.

Keywords

Angling, attitudes, participation, young people, lapsed, potential, interest in angling, encourage angling.

Research Contractor

This document was produced under R&D Project W2-060 by:
Diane Simpson, Freelance Market Research Consultant, 30 Newall Drive, Chilwell,
Nottingham, NG9 6NX
Tel: 07931 731349 Fax: 0115 9736735

Environment Agency's Project Manager

The Environment Agency's Project Manager for Project W2-060 was:
Dr Guy Mawle Environment Agency, Head Office, Rio House, Waterside Drive, Aztec
West, Bristol, BS32 4UD.

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EXECUTIVE SUMMARY

Objectives

To assess:

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

Method and Sample

- The data were collected by means of face to face interviews amongst representative samples of adults aged 15yrs+ and young people aged 12-16yrs.

Findings, Conclusions and Recommendations

Attitudes to Angling

- Attitudes to angling are generally positive, and perceptions of angling as a pastime are as positive, if not slightly more positive than they were in 1997.
- 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.

Angling Participation in England & Wales

- The research suggests that 9% of the population of England and Wales (i.e. just under 4 million) have been freshwater fishing in England and Wales in the last 2 years.
- Given rod licence sales data of around 1 million the above figure is likely to have been boosted by licence evasion, the criteria that they may have fished in the last 2 years and also that many people such as women and children are potentially going along on a fishing trip without a licence and considering themselves to have been freshwater fishing. It would be of interest to look into this situation further.
- The level of angling participation remained similar to that identified in 1997. The overall market structure is also similar with regard to the proportions of lapsed and potential anglers and those not interested in angling.
- There has been no reduction in the proportion of young anglers i.e.12-24yrs since 1997, although the 2001 angler profile appears to have fewer anglers aged 25-34yrs. The proportion of lapsed anglers in the 25-34 yr age group is also relatively high. This situation needs to be monitored for evidence of any further decline.
- The level of "lapsing" from angling is still at the level identified in previous research (i.e. just above the number of current anglers) and thus there is still much to be done to retain current anglers. There will always be drop out from any activity, but reducing this level will be beneficial.
- There are still many opportunities to gain new anglers and regain lapsed anglers. The research suggests that in addition to the 9% of the population of England and Wales

who have been fishing in the last 2 years a further 8% are interested in going fishing in the future. Of course this may not all translate into additional licence sales due to the possibility that many individuals may accompany an angler on a trip without a licence e.g. family days out.

- Interest amongst the youth market in going fishing in the future (particularly 12-14yr olds) is higher than that for adults, which bodes well for the future of the industry.
- Interest levels are lower for 15-16 yr olds than 12-14 yr olds. Thus although there are some promising signs in terms of the participation of 12-14 yr olds there is still likely to be high drop out amongst 15-16's, probably due to other commitments and interests taking priority. The challenge will be to keep youngsters involved in the sport after the age of 14 and also to attract the 15-16 yr age group.
- In order to keep anglers fishing and encourage others to start fishing (again) it will be important to continue with initiatives such as National Fishing Week Take A Friend Fishing etc. Places to fish and take children should be available and made known to the public particularly in light of the drop in the 25-34 yr age group.
- Knowledge of places to fish that are close to home is very important. The production of an angling guide containing this information is valuable but needs to be made known and made readily available to current non-anglers. Distribution of limited information would be of value via local press either via a press article or leaflet insert.
- Having someone to go fishing with is also critical. Running schemes through local schools/youth clubs/ scout/guide groups may be of value here particularly if parents can also go along. It would be beneficial if tackle were made available.
- Raising the profile of fishing and also the level of comfort involved by providing appropriate amenities such as toilets and food outlets may be of benefit to the young. Promotion of sites already suitably equipped for the young and families could be of benefit and would prove more economically sound.

CONTENTS

EXECUTIVE SUMMARY	iii
1. INTRODUCTION	1
2. OBJECTIVES	1
3. METHOD AND SAMPLE	2
4. MAIN FINDINGS	3
4.1 Attitudes Toward Angling	3
4.2 Angling Participation Within England and Wales	7
4.3 Those Who Had Not Been Freshwater Fishing In England Or Wales In The Last 2 Years	12
4.4 Lapsed Anglers	14
4.5 Interest In Going Fishing In The Future	16
4.6 Potential Anglers	20
4.7 Overall Market Structure	23
4.8 Factors That Would Encourage Respondents To Go Freshwater Fishing	25
5. CONCLUSIONS AND RECOMMENDATIONS	31
References	33
List of Figures	34
List of Tables	35
Appendix Adult and Youth Questionnaires	36

1. INTRODUCTION

In order to achieve a number of its business objectives for fisheries, the Environment Agency needed to assess 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.

2. OBJECTIVES

The overall objectives of the survey were to:

- assess attitudes toward angling in England and Wales, of the general public and particularly of young people;
- to 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, especially for young people as determined by the reaction to a number of statements about angling;
 - the interest amongst non-anglers of participating in the sport at some future date;
 - the factors that would encourage non-anglers, especially 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.

2 omnibus studies were utilised:

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

Interviews were conducted between 22nd February and 21st March 2001.

Data were collected from sampling points within England and Wales, to fall in line with the Environment Agency's area of coverage.

Both the youth and adult sample were designed to be representative of the population in England and Wales, in terms of gender, age, social grade and region.

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.

The margin of error at the 95% confidence level for the 2001 overall sample data (i.e. sample size over 2,000) is +/-2%. The margin of error for the youth data (sample size 398) is +/-3%.

4. MAIN FINDINGS

4.1 Attitudes Toward Angling

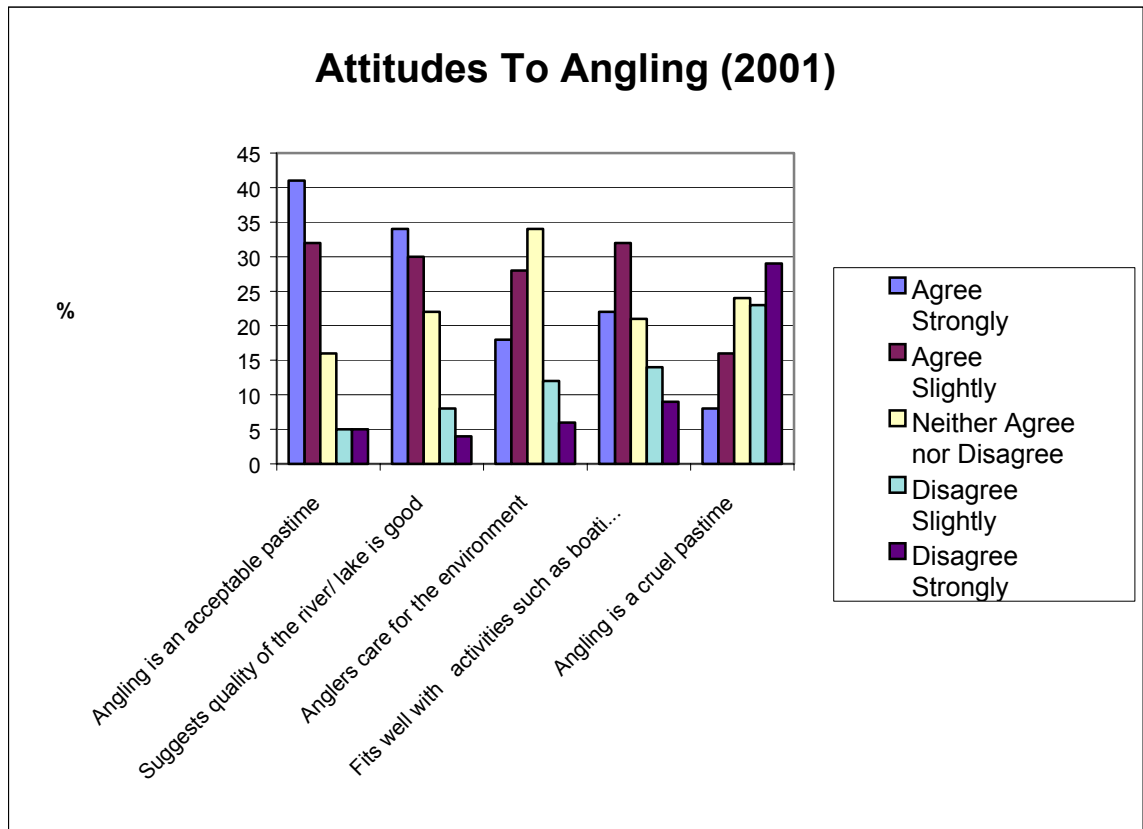


Figure 1 Attitudes towards angling

(Above chart: 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
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									
2001 - Youth Data 12-16yrs	398	%	23	35	24	10	6	2	3.59

The majority of the 2001 sample believed that angling is an acceptable pastime (73%). Only 10% of the sample disagreed with this statement and thus did not feel that angling is an acceptable pastime.

In 1997*, 75% agreed that angling was an acceptable pastime. The results in 2001 are however slightly more positive e.g. 41% agreed strongly compared to 36% in 1997.

(*Source: Marketing Focus 1997)

The youth sample (12-16yrs) overall agreed that angling was an “OK thing to do” (58%), although the level of agreement was not as high as for the overall sample - a high proportion of respondents neither agreed nor disagreed (24%).

(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	<i>Base</i>		Agree Strongly	Agree Slightly	Neither Agree nor Disagree	Disagree Slightly	Disagree Strongly	D/K	Mean Score
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									
2001 - Youth Data 12-16yrs	398	%	13	29	27	19	9	3	3.19

The largest proportion of respondents agreed that angling activity suggests that the quality of the river or lake is good (64%). This figure is less than in 1997. The level of disagreement with the statement however remained similar across the 2 years. A higher proportion of the sample in 2001 neither agreed nor disagreed.

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 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	<i>Base</i>		Agree Strongly	Agree Slightly	Neither Agree nor Disagree	Disagree Slightly	Disagree Strongly	D/K	Mean Score
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									
2001 - Youth Data 12-16yrs	398	%	14	23	32	19	7	5	3.18

46% of the sample agreed that anglers care for the environment. Only 18% disagreed with this statement, however 1/3 of the sample neither agreed nor disagreed.

The proportion agreeing with the statement, anglers care for the environment had decreased since 1997, although the proportion disagreeing remained the same. A change had also occurred in the neither agree or disagree category.

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 (26%).

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	<i>Base</i>		Agree Strongly	Agree Slightly	Neither Agree nor Disagree	Disagree Slightly	Disagree Strongly	D/K	Mean Score
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									
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. 23% did however disagree with this statement. These results are broadly similar to those recorded in 1997.

49% of the youth market agreed with the statement, whilst 24% disagreed. The youth sample were however more likely to agree slightly than agree strongly.

Table 5 – Angling is a cruel pastime

Angling is a cruel pastime	<i>Base</i>		Agree Strongly	Agree Slightly	Neither Agree nor Disagree	Disagree Slightly	Disagree Strongly	D/K	Mean Score
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									
2001 - Youth Data 12-16yrs	398	%	10	21	27	21	20	2	2.8

As in 1997, the majority of respondents did not feel that angling was a cruel pastime. 52% disagreed with the statement. The proportion who disagreed strongly had in fact increased since 1997.

The situation amongst the youth sample was less clear cut. 41% disagreed that angling was cruel, whilst 31% felt that it was cruel. 27% neither agreed nor disagreed.

Chi-squared tests conducted on the data for attitudes to angling suggest significant differences in the youth and overall sample data. Differences in the data between 1997 and 2001 for each statement are also suggested.

Chi-squared test results are as follows:

All results are based on a critical value of chi of 9.49 with 4 degrees of freedom at the 5% significance level.

Angling is an acceptable pastime/is an ok thing to do:

2001 adult data and 1997 adult data - 42.06

2001 adult and youth 2001 data - 57.76

Angling activity suggests that the quality of the river or lake is good:

2001 adult data and 1997 adult data - 67.72

2001 adult and youth 2001 data - 113.19

Anglers care for the environment:

2001 adult data and 1997 adult data - 62.27

2001 adult and youth 2001 data - 21.61

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

2001 adult data and 1997 adult data - 52.79

2001 adult and youth 2001 data - 16.23

Angling is a cruel pastime

2001 adult data and 1997 adult data - 75.63

2001 adult and youth 2001 data - 18.83

Table 6 – Attitudes to angling, 1997 and 2001 youth data (12-14yrs)

Angling is an OK thing to do	<i>Base</i>		Agree Strongly	Agree Slightly	Neither Agree nor Disagree	Disagree Slightly	Disagree Strongly	D/K
2001 - 12-14yrs	234	%	20	41	27	9	6	3
1997 - 12-14 yrs	168	%	18	44	15	11	5	6
If you see someone angling you would think the water in the river or lake is clean								
2001 - 12-14yrs	234	%	15	29	27	18	9	5
1997 - 12-14yrs	168	%	20	34	20	13	3	11
Anglers care for the environment								
2001 - 12-14yrs	234	%	14	24	31	21	6	8
1997 - 12-14yrs	168	%	14	24	24	21	8	10
Angling goes well with things like boating and walking or cycling along the river bank								
2001 - 12-14yrs	234	%	17	35	26	16	7	2
1997 - 12-14yrs	168	%	21	36	15	11	7	10
Angling is cruel								
2001 - 12-14yrs	234	%	11	23	27	23	18	3
1997 - 12-14yrs	168	%	14	20	18	28	15	5

Little change was evident in responses amongst 12-14yr olds between 1997 and 2001, with the exception of “if you see someone angling you would think the water in the river or lake is clean”, where respondents were less likely to agree in 2001 than in 1997.

Regions:

Taking the 12-65+ sample, as a generalisation those in Wales and the North were often slightly more likely to agree with the statements than those in other regions, with the exception of “angling is a cruel pastime”, where they were more likely to disagree.

4.2 Angling Participation Within England and Wales

The 2001 study suggests that 9% 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 1997 i.e. 9%.

Based on a population aged 12 and over in England and Wales of 43,287,000* the number of people aged 12 and over who have been freshwater fishing in the last 2 years is 3,895,830.

(* Source - Office of Population and Census Surveys - estimated mid year resident population)

The 2001 data again show a considerable disparity on figures obtained in the 1994 National Anglers Survey - 2.3 million coarse anglers.

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)

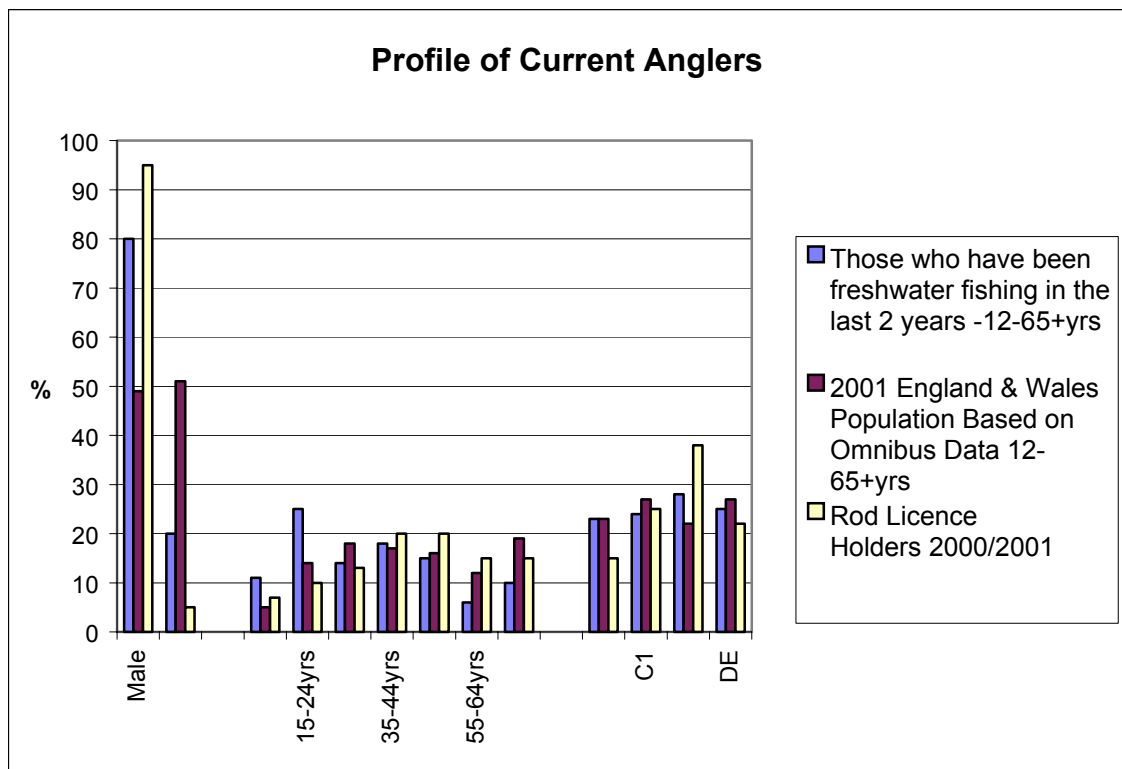


Figure 2 - Profile of current anglers

Table 7 – Demographic profile of 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 2000/2001
PROFILE OF ANGLERS	2001 12-65+yrs	2001 12-65+ yrs	1997 12-65+yrs	2001
Base	2254	201	520	2600
SEX	%	%	%	%
Male	49	80	77	95
Female	51	20	23	5
AGE				
12-14yrs	5	11	8	7
15-24yrs	14	25	29	10
25-34yrs	18	14	24	13
35-44yrs	17	18	19	20
45-54yrs	16	15	9	20
55-64yrs	12	6	6	15
65yrs	19	10	5	15
SOCIAL GRADE				
AB	23	23	17	15
C1	27	24	22	25
C2	22	28	29	38
DE	27	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 15-24 year olds.

A chi-squared test conducted on the 2001 and 1997 age profiles suggests a significant difference between the two sets of data. (Chi squared test statistic of 18.10, critical value of 12.59 with 6 degrees of freedom at the 5% significance level.) The proportion of those aged 25-34 years is lower in 2001 than in 1997.

The profile of rod licence holders* shows a much lower proportion of females and an apparently older age profile. 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

	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
Region of Residence	2001 12-65+yrs	2001 12-65+yrs	1997 12-65+yrs
Base	2254	201	520
	%	%	%
London	14	13	13
South East	21	23	21
South West	9	11	9
Wales	6	6	4
East Anglia	4	6	5
East Midlands	8	9	10
West Midlands	10	7	13
Yorks/Humber	10	9	9
North West	12	11	13
North	6	6	3

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

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

Table 9 – Profile of youth anglers

	Total Omnibus Sample	2001 Youth 12-16yrs (Those who had been fishing in the last 2 years)
Base	398	85
SEX	%	%
Male	52	73
Female	48	27
AGE		
12	20	22
13	20	23
14	20	16
15	19	25
16	20	13
SOCIAL GRADE		
AB	22	22
C1	25	26
C2	24	28
DE	30	23
Region of Residence		
London	10	4
South East	25	35
South West	9	10
Wales	6	11
East Anglia	5	9
East Midlands	8	4
West Midlands	10	7
Yorks/Humber	10	7
North West	11	7
North	7	5

The young anglers were again predominantly male, but otherwise broadly matched the population profile for the relevant age group.

4.3 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. 7% had fished 1-2 times previously, whereas 6% had fished on 3 or more occasions in the last 10 years.

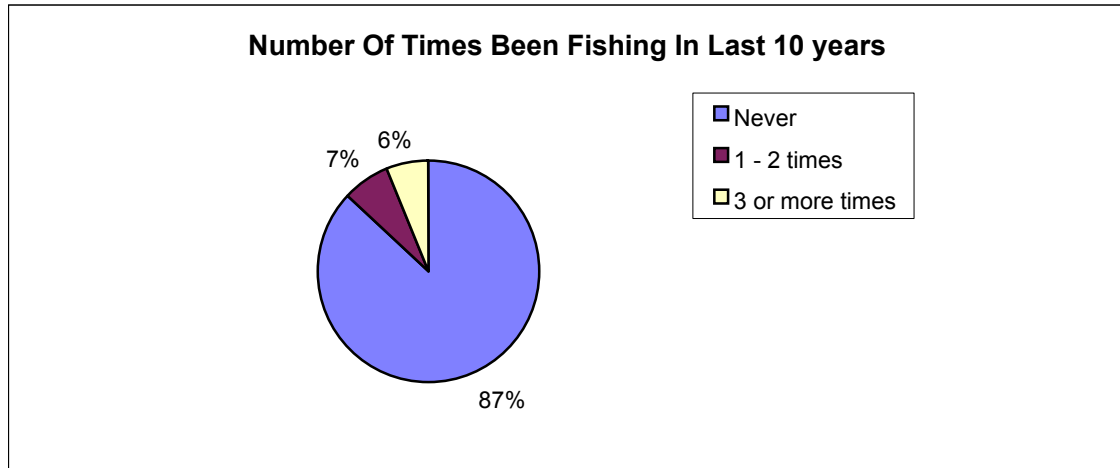


Figure 3 – Number of times been fishing in the last 10 years

The females and older age groups were the least likely to have fished in the last 10 years.

Table 10 – Number of times been freshwater fishing in the last 10 years

Q2 How many times been freshwater fishing in last 10 years										
	Sex			Age						
	TOTAL	Male	Female	12-14yrs	15-24	25-34	35-44	45-54	55-64	65+
Base (wtd.)	2053	942	1111	81	270	375	352	321	254	400
	%	%	%	%	%	%	%	%	%	%
Never	87	82	91	81	78	82	86	90	93	95
1 - 2 times	7	8	5	14	11	11	7	4	4	2
3 or more times	6	10	3	4	11	7	7	7	3	2
Don't Know	0	0	0	1	-	0	-	-	-	-

The data for 2001 closely reflects that recorded in 1997, i.e. never 87%, 1-2 times 6% and 3 or more times 6%.

20% of the total sample had in fact been fishing in the last 10 years (i.e. been fishing in last 2 years 9%, been fishing 2-10 years ago 11.5% of the total sample).

Youth Data:

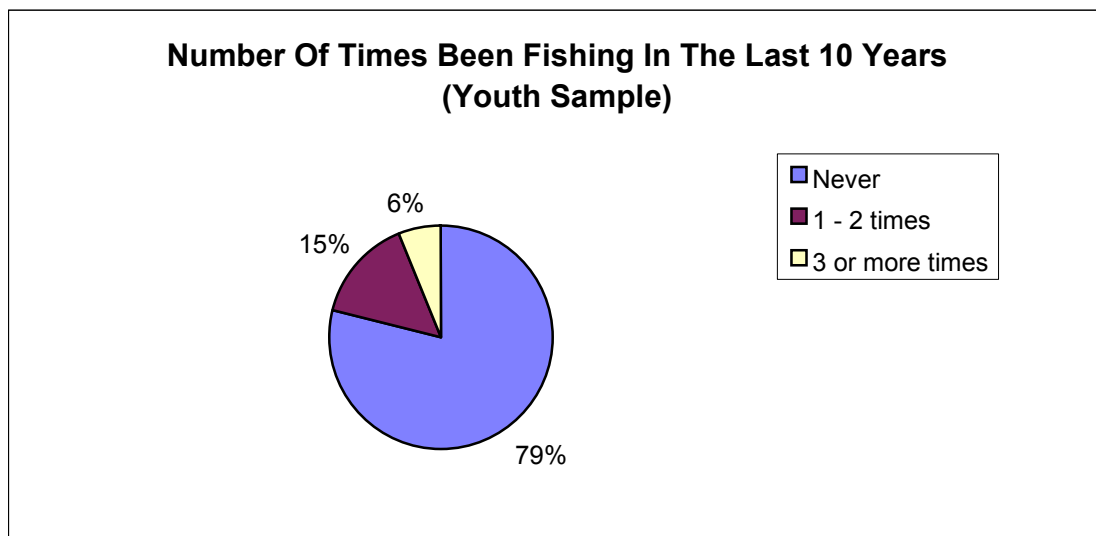


Figure 4 – Number of times been fishing in the last 10 years (youth sample)

The youth data reflects the data for the total sample, in that the highest proportion had not fished before, however a higher proportion of 12-16 year olds had fished 1-2 times. (A chi-squared test identified a significant difference between the results for the overall sample and the youth data: chi-squared test statistic of 25.42, critical value of 5.99, with 2 degrees of freedom, at the 5% significance level.)

Table 11 – Number of times been freshwater fishing in last 10 years – youth sample

Q2 How many times been freshwater fishing in last 10 years	2001 Youth 12-16yrs	Male	Female
Base (wtd.)	313	143	170
	%	%	%
Never	79	70	86
1 - 2 times	15	21	9
3 or more times	6	9	4
Don't Know	1	1	0

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

There was little change in results for the 12-14 yr age group between 1997 and 2001. (1997 never 82%, 1-2 times 9%, 3 or more times 6%; 2001 12-14yrs never 81%, 1-2 times 14%, 3 or more times 4%.)

4.4 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.

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

52% of the lapsed anglers had fished 1-2 times in the last 10 years, whilst 48% had fished 3 or more times.

The number of lapsed anglers within the population is slightly more than the number who had fished in the last 2 years.

Profile Of Lapsed Anglers:

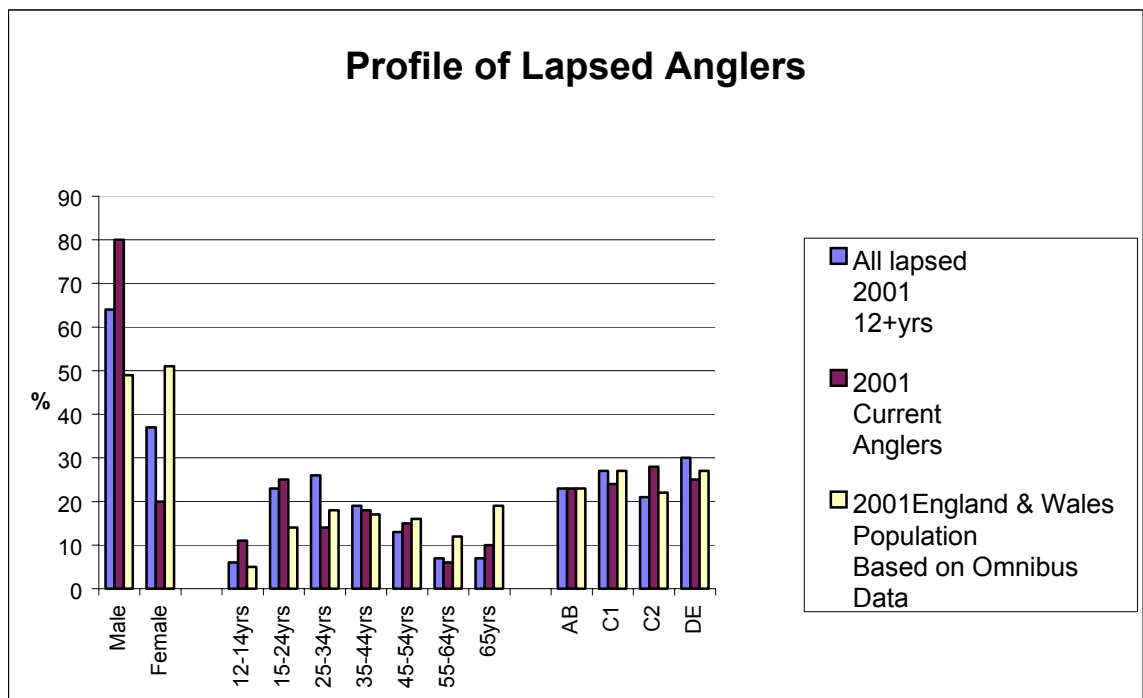


Figure 5 – Profile of lapsed anglers – compared to profile of current anglers

Table 12 – Profile of lapsed anglers

PROFILE OF LAPSED ANGLERS	All lapsed 2001 12-Adult	All lapsed 1997 12+	2001 Lapsed Fished 1-2 times	2001 Lapsed Fished 3+ times	2001 Current Anglers	2001 Total Omnibus Sample
Base	260	642	136	124	201	2254
SEX	%	%	%	%	%	%
Male	64	65	55	72	80	49
Female	37	35	45	28	20	51
AGE						
12-14yrs	6	3	8	3	11	5
15-24yrs	23	31	22	24	25	14
25-34yrs	26	23	30	21	14	18
35-44yrs	19	17	18	20	18	17
45-54yrs	13	12	8	17	15	16
55-64yrs	7	6	7	7	6	12
65yrs	7	8	7	7	10	19
SOCIAL GRADE						
AB	23	15	25	19	23	23
C1	27	24	32	21	24	27
C2	21	31	19	24	28	22
DE	30	30	24	36	25	27

The profile of lapsed anglers was predominantly male, but had a higher proportion of females than the current angler profile. Age and social grade profiles did not vary markedly between lapsed and current anglers however the lapsed angler profile appeared to have a higher proportion of 25-34 year olds.

Results were fairly similar between 1997 and 2001, although there appeared to be fewer lapsed anglers aged 12-24 yrs in 2001. Although this difference is not significant it is encouraging to note that the figure for 2001 is lower rather than greater than that in 1997.

Table 13 - Lapsed youth anglers:

SEX	2001 Lapsed Youth 12-16yrs
Base	65
	%
Male	65
Female	35
AGE	
12	13
13	18
14	24
15	18
16	27
SOCIAL GRADE	
AB	30
C1	28
C2	14
DE	28

Although the base size is small it appeared that the young anglers were most likely to lapse at the age of 14 or 16yrs.

4.5 Interest In Going Fishing In The Future

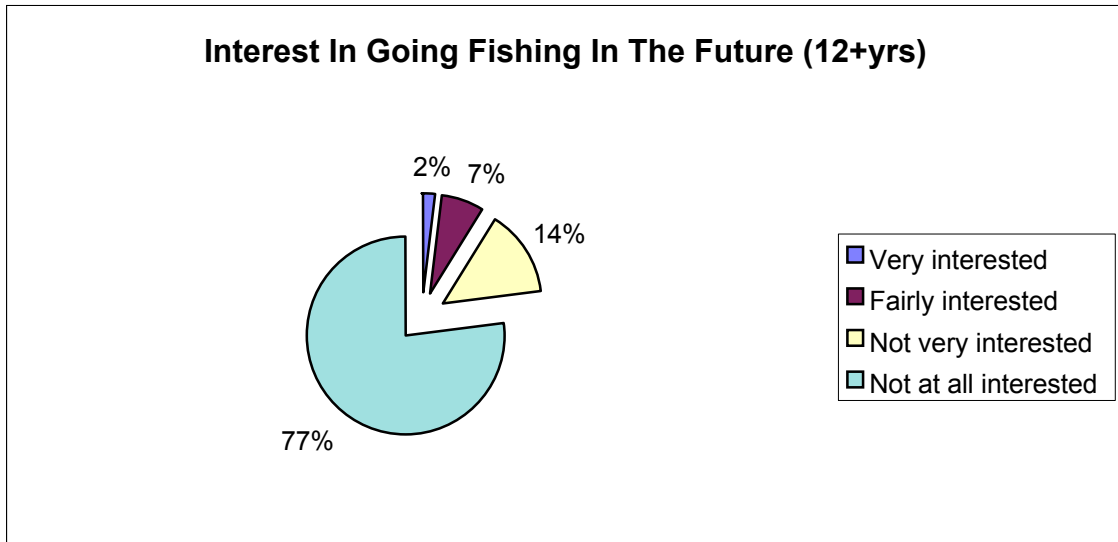


Figure 6 – Interest in going fishing in the future (12+yrs)

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

9% of current non-anglers were interested in going fishing at some time in the future. Those who had fished previously were more interested in going fishing. In fact those who had fished 3 or more times showed greater interest than those who had only fished on 1 or 2 occasions. Of course the number of those who have never fished is higher than the number of lapsed anglers and as such represents a greater opportunity in terms of volume.

Table 14 – Interest in going fishing in the future

	Times been freshwater fishing in last 10 years?			
INTEREST IN GOING FISHING IN THE FUTURE - 2001 12yrs+	TOTAL	Never	1-2 times	3 or more times
Base (wtd.)	2053	1790	136	124
Mean score	1.34	1.23	1.91	2.39
	%	%	%	%
Very interested	2	1	8	18
Fairly interested	7	5	15	26
Not very interested	14	10	36	34
Not at all interested	77	84	40	23

Table 15 – Interest in going fishing in the future 1997

	Times been freshwater fishing in last 10 years?			
INTEREST IN GOING FISHING IN THE FUTURE - 1997 12+yrs	TOTAL	Never	1-2 times	3 or more times
Base (wtd.)	5258	4599	308	334
Mean score	1.36	1.25	1.89	2.33
	%	%	%	%
Very interested	2	1	4	13
Fairly interested	9	6	21	33
Not very interested	12	10	34	27
Not at all interested	77	83	41	26

Base: All those who had not been fishing in the last 2 years.

The interest in going fishing recorded in 2001 was similar to that identified in 1997.

Interest was greater amongst males than females, and with the exception of the 15-24 yr age group interest increased the younger the age group.

Table 16 – 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	2053	942	1111	81	270	375	352	321	254	400
INTERESTED	9	13	6	25	10	14	12	6	5	3

Youth:

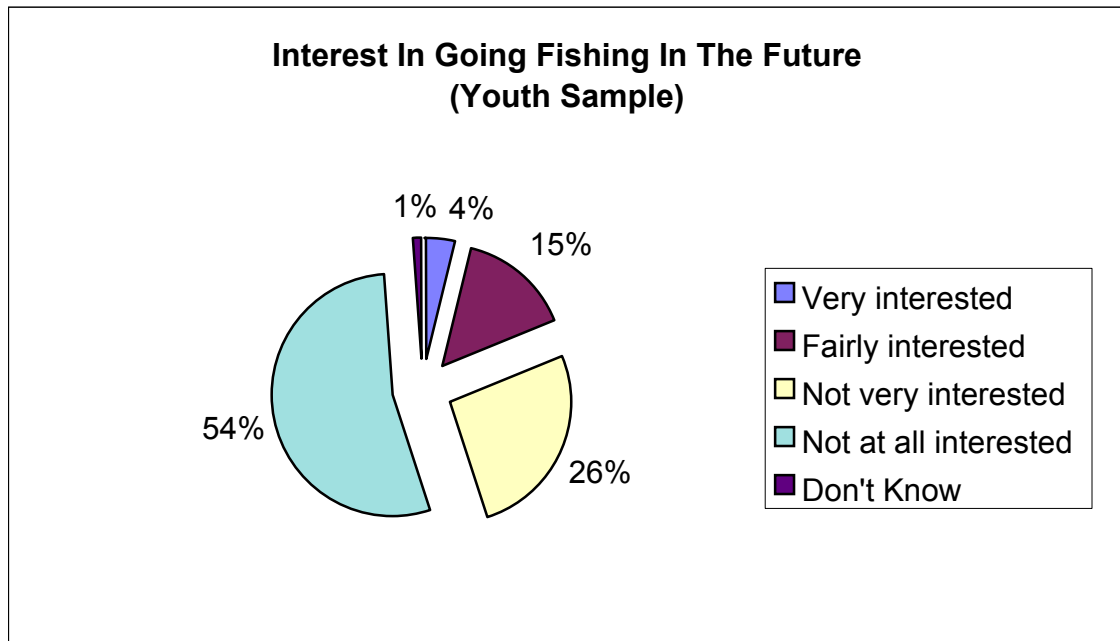


Figure 7 – Interest in going fishing in the future (youth sample)

It would appear that the 12-16 age group had more interest in going fishing in the future than the overall sample, particularly those who had never fished before.

Interest was actually greater amongst the 12-14 yr olds than those aged 15-16 (25% and 10% respectively). Interest was also greater amongst males than females: males 28% interested, females 11% interested.

Table 17 – Interest in going fishing in the future – youth sample

INTEREST IN GOING FISHING IN THE FUTURE - 2001 12-16yrs	Times been freshwater fishing in last 10 years?			
	TOTAL	Never	1-2 times	3 or more times
Base (wtd.)	313	246	46	19
Mean score	1.69	1.56	2.11	2.22
	%	%	%	%
Very interested	4	3	10	6
Fairly interested	15	13	19	27
Not very interested	26	21	45	52
Not at all interested	54	63	27	16

68% of the youth sample who were interested in going fishing, had not fished in the last 10 years. This suggests a high level of unsatisfied demand and offers a lot of potential for the future development of the youth market.

Table 18 – Interest in going fishing in the future 1997 and 2001 data (12-14yrs)

INTEREST IN GOING FISHING IN THE FUTURE	1997 12-14yrs	2001 12-14yrs
Base (wtd.)	128	190
	%	%
Very interested	3	6
Fairly interested	22	18
Not very interested	21	26
Not at all interested	52	49

Again there was little difference between 1997 and 2001 data for the 12-14 yr olds in terms of interest in going fishing in the future.

4.6 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).

8% of the total sample could be defined as potential anglers. (2% of the total sample were very interested in going fishing, whilst 6% were fairly interested.)

This suggests that there are just under 3.5 million potential anglers in England and Wales.

In 1996 the proportion of potential anglers in England and Wales was 9%, whilst the proportion in 1997 was 10%. The proportion of potential anglers has not changed significantly since 1997.

Profile of Potential Anglers:

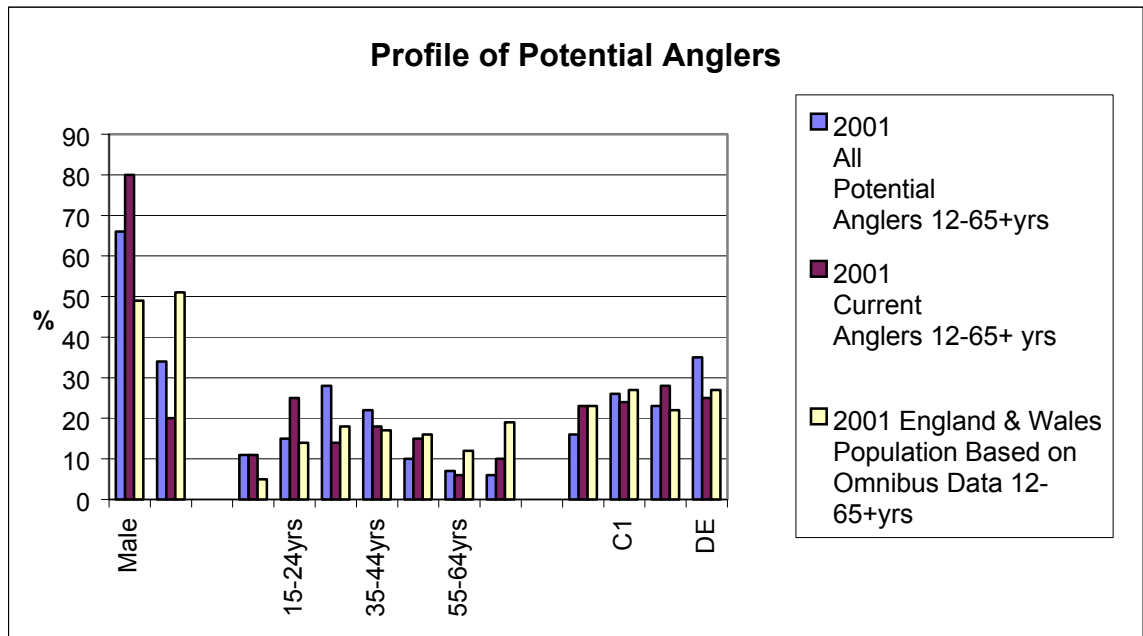


Figure 8 – Profile of potential anglers – compared to the profile of current anglers

The profile of potential anglers had a higher proportion of females than the current angler profile, and overall a slightly lower social grade distribution.

Interestingly there was a slightly higher proportion of potential anglers aged 25-34yrs and also 35-44 yrs than current anglers of these age groups. This may suggest a return to angling in the future once the influence of other commitments decreases. There was of course a suggestion of a decline in this age group within the current angler profile for 2001.

Table 19 – Profile of potential anglers

PROFILE OF POTENTIAL ANGLERS	2001 All Potential Anglers 12- 65+yrs	1997 All Potential Anglers	2001 Current Anglers 12-65+ yrs	2001 Total Omnibus Sample 12- 65+yrs
Base	185	555	201	2254
Sex	%	%	%	%
Male	66	66	80	49
Female	34	35	20	51
Age				
12-14yrs	11	6	11	5
15-24yrs	15	23	25	14
25-34yrs	28	26	14	18
35-44yrs	22	16	18	17
45-54yrs	10	13	15	16
55-64yrs	7	9	6	12
65yrs	6	7	10	19
Social Grade				
AB	16	12	23	23
C1	26	24	24	27
C2	23	32	28	22
DE	35	32	25	27

The potential angler profile was broadly similar to that identified in 1997.

The profile by region was similar to that for current anglers.

4.7 Overall Market Structure

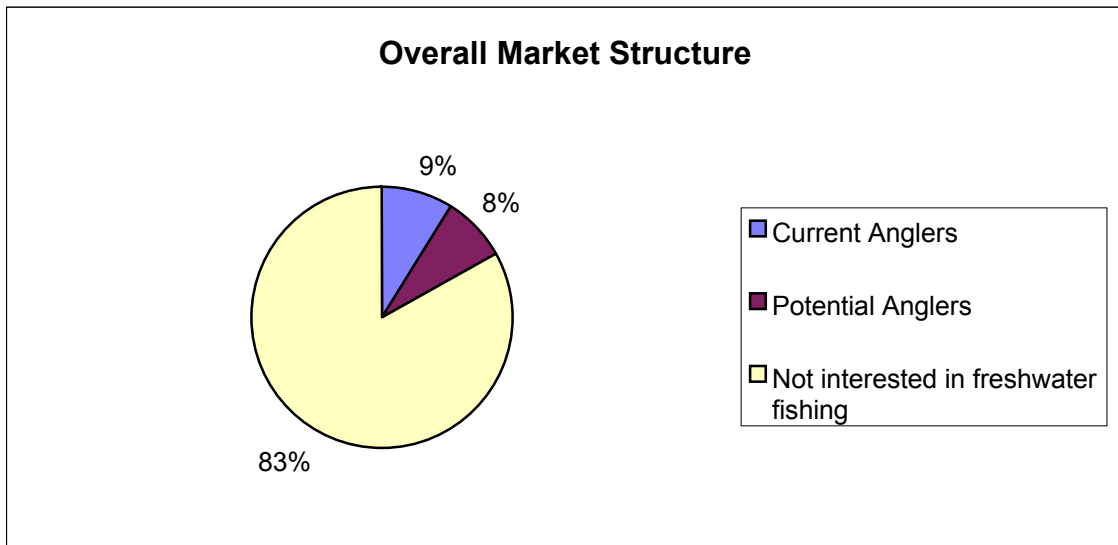


Figure 9 – Overall market structure

The research suggests that taking the population of England and Wales, 9% have been freshwater fishing in the last 2 years, 8% are interested in going freshwater fishing in the future and 83% have no interest in going freshwater fishing.

Of the potential anglers 54% had not been fishing in the last 10 years, whilst 46% had been freshwater fishing in the last 10 years i.e. are lapsed anglers.

In the future it would 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 1997 reflects the above findings i.e. 9% current anglers, 10 % potential and 81% not interested.

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

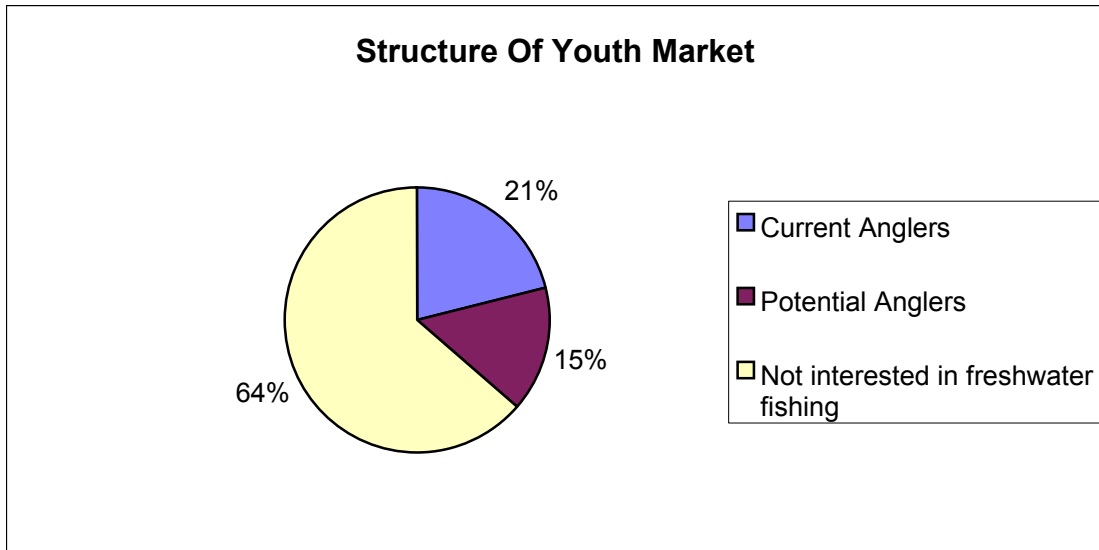


Figure 10 – Structure of the youth market

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. 68% of those interested in fishing had not fished before (or at least, not in the last 10 years).

4.8 Factors That Would Encourage Respondents To Go Freshwater Fishing

Table 20 – Factors that would encourage you to go fishing again

Q4 Factors that would encourage you to go fishing again	Sex		Age							
	TOTAL	Male	Female	12-14yrs	15-24	25-34	35-44	45-54	55-64	65+
Total (wtd.)	177	117	60	11	41	48	39	21	12	7
	%	%	%	%	%	%	%	%	%	%
Having someone to go with	33	27	45	52	35	23	25	39	67	30
Knowing places to fish that are close to home	23	25	18	33	18	30	19	28	12	-
More fish in the rivers or lakes	19	21	16	25	9	25	20	21	27	14
Being able to borrow or hire fishing tackle	18	20	14	12	17	35	8	6	17	16
Places to fish AND take children	18	14	24	2	8	25	26	4	43	-
Paying less money for the fishing licence	17	16	19	7	24	15	21	14	7	14
Having things like toilets and snack bars at the places you go fishing	16	15	17	8	8	13	23	27	13	25
If it was easier to use fishing ponds or lakes near to home	16	17	15	7	6	10	29	37	6	16
Knowing when the fishing season starts and finishes	10	9	12	14	10	10	9	11	6	11
Being able to buy a licence from more places	8	8	10	3	10	3	13	19	6	-
If more people were involved in fishing and knew more about it	7	6	9	11	8	7	6	-	10	11
Knowing about fishing clubs that are near to home	6	6	4	10	2	9	5	5	6	-
Other reason	17	19	13	4	12	20	17	22	16	38
Don't Know	4	4	4	14	-	4	3	6	-	16
Nothing	10	9	14	21	15	10	12	-	7	-

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 appeared to be the key factor that would encourage the lapsed anglers to fish again. This was particularly true for the females and 12-14 and 55-64 yr age group.

Knowledge of local places to fish was also a key factor. Most Environment Agency regions are now producing Angling Guides, which are being promoted to address this specific problem.

The aforementioned 2 factors were the most frequently mentioned in the study conducted in 1997 (Marketing Focus UK Ltd)

Places to fish and take children were of particular interest to the females and also the 25-44 year olds and 55-64 year olds i.e. potentially those with children or grandchildren (note small bases)

The ability to buy a licence in more places, a greater involvement in angling by the public generally and knowledge of fishing clubs appeared to be less influential on the likelihood to fish again, when the considering the sample overall.

Table 21 - 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	TOTAL	Male	Female
Base (wtd.)	49	32	17
	%	%	%
Having someone to go with	48	58	32
Knowing places to fish that are close to home	27	33	16
More fish in the rivers or lakes	19	23	12
If more people were involved in fishing and knew more about it	15	19	6
Paying less money for the fishing licence	14	18	8
Having things like toilets and snack bars at the places you go fishing	8	5	13
Being able to borrow or hire fishing tackle	8	8	8
Knowing when the fishing season starts and finishes	7	4	12
If it was easier to use fishing ponds or lakes near to home	6	10	-
Knowing about fishing clubs that are near to home	5	7	-
Places to fish AND take children	5	5	4
Being able to buy a licence from more places	4	2	6
Other reason	7	6	8

Don't Know	7	5	10
Nothing	19	10	36

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.

Having someone to go with was again potentially a key factor that may encourage young people to go fishing. Knowledge of local places to fish, more fish in the rivers, greater involvement in fishing amongst the public and lower licence fees 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 possibly suggests the need to be associated with an activity that has “credibility” amongst their peers.

Table 22 - 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 2001	TOTAL	Sex		Age						
		Male	Female	12-14yrs	15-24	25-34	35-44	45-54	55-64	65+
Base (wtd)	286	160	126	29	53	66	51	33	27	27
	%	%	%	%	%	%	%	%	%	%
Having someone to go with	38	36	40	43	38	43	29	32	42	37
Places to fish AND take children	20	21	18	15	7	30	33	21	9	8
Information on how to fish	19	16	24	32	24	15	23	18	13	5
Knowing places to fish that are close to home	15	16	14	36	15	20	7	10	14	-
Being able to borrow or hire fishing tackle	15	16	14	16	9	26	19	2	15	9
If it was easier to use fishing ponds or lakes near to home	10	10	10	20	10	12	7	10	8	7
Paying less money for the fishing licence	10	10	10	13	11	21	5	-	7	3
Knowing about fishing clubs that are near to home	9	12	6	19	9	7	10	10	6	9
Information on what equipment is needed to go fishing	8	11	5	16	14	3	11	7	3	3
If more people were involved in	7	4	10	21	8	11	5	-	-	-

fishing and knew more about it										
Knowing when the fishing season starts and finishes	6	8	3	16	5	1	11	6	-	6
Having things like toilets and snack bars at the places you go fishing	5	4	6	23	6	2	3	2	-	-
More fish in the river or lakes	5	6	3	12	7	4	8	-	-	-
Being able to buy a licence from more places	4	5	3	5	-	7	9	2	-	-
Don't Know	3	2	5	2	4	2	3	-	4	7
None of these	27	27	26	13	26	16	30	37	44	33

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

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 places to fish that are close to home and being able to borrow or hire tackle.

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. Mention of somewhere to fish and take children has increased substantially since 1997.

Table 23 – 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			
	TOTAL	Male	Female
Base (wtd.)	91	43	47
	%	%	%
Having someone to go with	39	45	33
Information on how to fish	31	35	27
Knowing places to fish that are close to home	29	41	18
If more people were involved in fishing and knew more about it	19	18	20
Having things like toilets and snack bars at the places you go fishing	18	17	19
If it was easier to use fishing ponds or lakes near to home	16	13	19
Knowing about fishing clubs that are near to home	15	25	6
Being able to borrow or hire fishing tackle	13	20	7
Places to fish AND take children	13	15	11
Information on what equipment is needed to go fishing	13	24	3
Paying less money for the fishing licence	12	13	11
Knowing when the fishing season starts and finishes	12	14	11
More fish in the river or lakes	11	17	6
Being able to buy a licence from more places	3	4	2
Don't Know	4	-	8
None of these	18	5	29

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 and knowledge of local places to fish. Again a wider appreciation of and involvement in fishing was of greater importance to the youth sample than the overall sample.

The males appeared more likely to be influenced than the females by information on equipment, ability to hire tackle and knowledge of local fishing clubs.

Angling Promotion Initiatives:

An issue mentioned by respondents i.e. paying less for the licence fee has actually been tackled this year, as the junior annual licence has been reduced to only £5.

Many other initiatives have taken place or are planned to encourage angling and provide the required know-how e.g. Take a Friend Fishing, National Fishing Week; Scouts angler badge sponsored by the Agency; NFA road-show, issue of angling guides etc.

It will be important that these initiatives are promoted to those currently not involved in angling i.e. ensure marketing is not limited to angling magazines, mailings to current anglers etc. to increase the opportunity for non anglers to take part.

Having someone to go with is a major issue and needs to be looked into. There are likely to be a number of issues involved here - a) a need for advice, b) a need for companionship and c) a need for transport. The precise need for “ someone to go with” is not clear and may vary by person.

Both adults and children seem to need someone to accompany them on their trip. In the case of the children it is likely that they will need adult involvement and also a friend to fish with, particularly if the adult is not a member of their family.

Image and “street cred” is an issue for young people and the overall image of angling needs to be taken into consideration. There is however interest in angling amongst the younger age groups. If young people are “seen” to be involved then others may follow.

5. CONCLUSIONS AND RECOMMENDATIONS

Attitudes to Angling

- Attitudes to angling are overall generally positive, and perceptions of angling as a pastime are at least as positive as they were in 1997.
- 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. It is likely that in many cases they do not have the knowledge or experience to form an opinion of certain aspects of angling.

Angling Participation in England & Wales

- The research suggests that 9% of the population of England and Wales (i.e. just under 4 million) have been freshwater fishing in England and Wales in the last 2 years.
- Given rod licence sales data of around 1 million the above figure is likely to have been boosted by licence evasion, the criteria that they may have fished in the last 2 years and also that many people such as women and children are potentially going along on a fishing trip without a licence and considering themselves to have been freshwater fishing. It would be of interest to look into this situation further.
- The level of angling participation remained similar to that identified in 1997. The overall market structure is also similar with regard to the proportions of lapsed and potential anglers and those not interested in angling.
- There has been no reduction in the proportion of young anglers i.e.12-24yrs since 1997, although the angler profile in 2001 appears to have a lower proportion aged 25-34yrs. The proportion of lapsed anglers in the 25-34 yr age group is also relatively high. This situation needs to be monitored for evidence of any further decline.
- The level of “lapsing” from angling is still at the level identified in previous research and thus there is still much to be done to retain current anglers. There will always be drop out from any activity, but reducing this level will be beneficial.
- There are still many opportunities to gain new anglers and regain lapsed anglers. The research suggests that in addition to the 9% of the population of England and Wales who have been fishing in the last 2 years a further 8% are interested in going fishing in the future. Of course this may not all translate into additional licence sales due to the possibility that many individuals may accompany an angler on a trip without a licence e.g. family days out.
- Interest amongst the youth market in going fishing in the future (particularly 12-14yr olds) is higher than that for adults, which bodes well for the future of the industry.
- Interest levels are lower for 15-16 yr olds than 12-14 yr olds. Thus although there are some promising signs in terms of the participation of 12-14 yr olds there is still likely to be high drop out amongst 15-16's, probably due to other commitments and interests taking priority. The challenge will be to keep youngsters involved in the sport after the age of 14 and also to attract the 15-16 yr age group.

- In order to keep anglers fishing and encourage others to start fishing (again) it will be important to continue with initiatives such as National Fishing Week, Take A Friend Fishing etc. Places to fish and take children should be available and made known to the public particularly in light of the drop in the 25-34 yr age group.
- Knowledge of places to fish that are close to home is very important. The production of an angling guide containing this information is valuable but needs to be made known and made readily available to current non-anglers. Distribution of limited information would be of value via local press either via a press article or leaflet insert.
- Having someone to go fishing with is also critical. Running schemes through local schools/youth clubs/ scout/guide groups may be of value here particularly if parents can also go along. It would be beneficial if tackle were made available.
- Raising the profile of fishing and also the level of comfort involved by providing appropriate amenities such as toilets and food outlets may be of benefit to the young. Promotion of sites already suitably equipped for the young and families could be of benefit and would prove more economically sound.

References

Marketing Focus UK Ltd 1997, Phase 2 of the Fishing Licence Market Study, R&D Project Record W2/018/1

Simpson and Mawle, July 2001, Survey Of Rod Licence Holders, R&D Project W2-057

List of Figures

Figure 1 - Attitudes towards angling	3
Figure 2 - Profile of current anglers	8
Figure 3 - Number of times been fishing in the last 10 years	12
Figure 4 – Number of times been fishing in the last 10 years (youth sample)	13
Figure 5 – Profile of lapsed anglers – compared to profile of current anglers	14
Figure 6 – Interest in going fishing in the future (12+yrs)	16
Figure 7 – Interest in going fishing in the future (youth sample)	19
Figure 8 – Profile of potential anglers – compared to the profile of current anglers	21
Figure 9 – Overall market structure	23
Figure 10 – Structure of the youth market	24

List of Tables

Table 1	Angling is an acceptable pastime	3
Table 2	– Angling activity suggests that the quality of the river or lake is good	4
Table 3	– Anglers care for the environment	4
Table 4	– Angling fits in well with other activities such as boating and walking or cycling along the riverbank	5
Table 5	– Angling is a cruel pastime	5
Table 6	– Attitudes to angling, 1997 and 2001 youth data (12-14yrs)	7
Table 7	– Demographic profile of anglers	9
Table 8	– Regional profile of anglers	10
Table 9	– Profile of youth anglers	11
Table 10	– Number of times been freshwater fishing in the last 10 years	12
Table 11	– Number of times been freshwater fishing in last 10 years – youth sample	13
Table 12	– Profile of lapsed anglers	15
Table 13	- Lapsed youth anglers	15
Table 14	– Interest in going fishing in the future	17
Table 15	– Interest in going fishing in the future 1997	17
Table 16	– Interest in going fishing in the future by age	18
Table 17	– Interest in going fishing in the future – youth sample	19
Table 18	– Interest in going fishing in the future 1997 and 2001 data (12-14ys)	20
Table 19	– Profile of potential anglers	22
Table 20	– Factors that would encourage you to go fishing <u>again</u>	25
Table 21	- Youth sample - factors that would encourage you to go fishing again	26
Table 22	- Factors that would encourage those who had not been fishing in the last 10 years to go fishing in the future	27
Table 23	– Youth sample - factors that would encourage you to go fishing in the future	29

Appendix

Adult Questionnaire
Youth (12-16 yr) Questionnaire

Adult Questionnaire

ASK ALL

Q1 Have you been freshwater fishing in the last 2 years, by freshwater fishing I mean fishing inland and not in the sea.

Yes 1 - GO TO Q6
No 2 - CONTINUE
Don't Know 3 - CONTINUE

(If yes skip to Q6)

Q2 How many times have you been freshwater fishing in the last 10 years?

Never 1
1-2 times 2
3 or more times 3
Don't Know 4

Q3 How interested would you be in going freshwater fishing in the future?

SHOW SCALE

Very interested 1 - CONTINUE
Fairly interested 2 - CONTINUE
Not very interested 3 - CONTINUE
Not at all interested 4 - GO TO Q6
Don't know 5 - GO TO Q6

**ASK Q4 IF HAVE FISHED 1-2 OR 3 OR MORE TIMES IN LAST 10 YEARS
I.E. CODES 2-3 AT Q2 AND WERE VERY/FAIRLY INTERESTED OR NOT
VERY INTERESTED IN GOING FISHING CODES 1, 2 OR 3 AT Q3 -
OTHERWISE SKIP**

SHOW LIST

Q4 And which of these factors would encourage you to go fishing again? **code all mentioned**

Greater awareness of local fishing sites 1
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 10
Someone to go with 11
Places to fish and take children 12
Other 13
None 14

NOW GO TO Q6

ONLY ASK Q5 IF HAVE NOT BEEN FISHING IN LAST 10 YEARS I.E. CODE 1 AT Q2 AND ARE VERY/FAIRLY INTERESTED OR NOT VERY INTERESTED IN GOING FISHING IN THE FUTURE CODES 1,2 OR 3 AT Q3 - OTHERWISE SKIP TO Q6

SHOW LIST

Q5 Which of the following would be likely to persuade you to go fishing in the future?
Code all mentioned

Greater awareness of local fishing sites	1
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	10
Improved fish stocks	11
Someone to go with	12
Ability to borrow/ hire tackle	13
Places to fish <u>and</u> take children	14
None	15

ASK ALL

Q6 I would like you to consider a number of statements about angling and tell me how much you agree or disagree with each.

SHOW SCALE READ OUT STATEMENTS

	Agree strongly	Agree slightly	Neither agree nor disagree	Disagree slightly	Disagree strongly
Angling is an acceptable pastime	1	2	3	4	5
Angling activity suggests that the water quality of the river or lake is good	1	2	3	4	5
Anglers care for the environment	1	2	3	4	5
Angling fits in well with other activities such as boating and walking or cycling along the river bank	1	2	3	4	5
Angling is a cruel pastime	1	2	3	4	5

12-16 Yr Questionnaire

ASK ALL

Q1 Have you been freshwater fishing in the last 2 years, by freshwater fishing I mean fishing inland and not in the sea.

Yes 1 - GO TO Q6
No 2 - CONTINUE
Don't Know 3 - CONTINUE

(If yes skip to Q6)

Q2 How many times have you been freshwater fishing in the last 10 years?

Never 1
1-2 times 2
3 or more times 3
Don't Know 4

Q3 How interested would you be in going freshwater fishing in the future?

SHOW SCALE

Very interested 1 - CONTINUE
Fairly interested 2 - CONTINUE
Not very interested 3 - CONTINUE
Not at all interested 4 - GO TO Q6
Don't know 5 - GO TO Q6

ASK Q4 IF HAVE FISHED 1-2 OR 3 OR MORE TIMES IN LAST 10 YEARS I.E. CODES 2-3 AT Q2 AND WERE VERY/FAIRLY INTERESTED OR NOT VERY INTERESTED IN GOING FISHING CODES 1, 2 OR 3 AT Q3 - OTHERWISE SKIP

SHOW LIST

Q4 And which of these things would encourage you to go fishing again? **code all mentioned**

Knowing places to fish that are close to home 1
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 10
Having someone to go with 11
Places to fish and take children 12
Other 13
None 14

NOW GO TO Q6

ONLY ASK Q5 IF HAVE NOT BEEN FISHING IN LAST 10 YEARS I.E. CODE 1 AT Q2 AND ARE VERY/FAIRLY INTERESTED OR NOT VERY

**INTERESTED IN GOING FISHING IN THE FUTURE CODES 1, 2 OR 3 AT Q3
- OTHERWISE SKIP TO Q6**

SHOW LIST

Q5 Which of the following would be likely to persuade you to go fishing in the future?

Code all mentioned

Knowing places to fish that are close to home	1
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	10
More fish in the rivers or lakes	11
Having someone to go with	12
Being able to borrow or hire fishing tackle	13
Places to fish <u>and</u> take children	14
None	15

ASK ALL

Q6 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. **SHOW SCALE READ OUT STATEMENTS**

	Agree alot	Agree a little	Neither agree nor disagree	Disagree a little	Disagree alot
Angling is an OK thing to do	1	2	3	4	5
If you see someone angling you would think that the water in the river or lake is clean	1	2	3	4	5
Anglers care for the environment	1	2	3	4	5
Angling goes well with things like boating and walking or cycling along the river bank	1	2	3	4	5
Angling is cruel	1	2	3	4	5