



Australian Government
Department of Agriculture,
Fisheries and Forestry



National Social and Economic Survey
of Recreational Fishers 2018-2021

Executive Summary



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National Social and Economic Survey of Recreational Fishers 2018-2021
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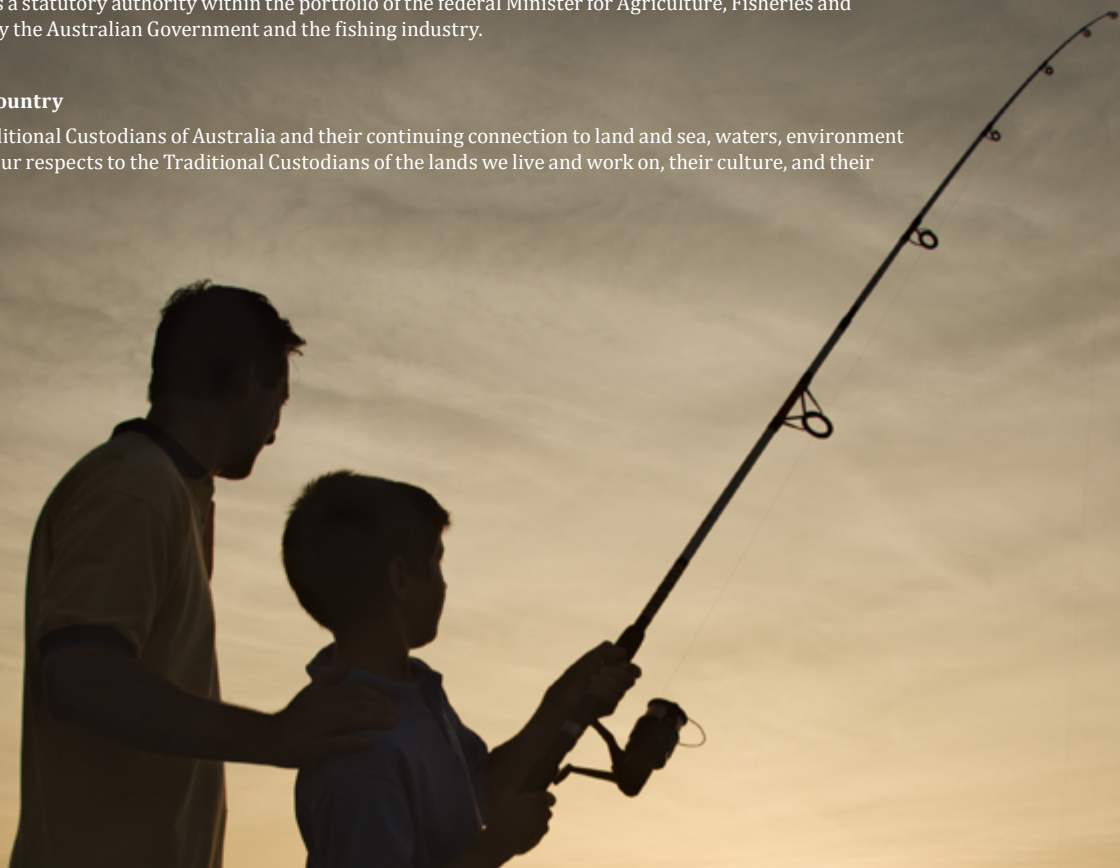
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Acknowledgement of Country

We acknowledge the Traditional Custodians of Australia and their continuing connection to land and sea, waters, environment and community. We pay our respects to the Traditional Custodians of the lands we live and work on, their culture, and their Elders past and present.



Introduction

Recreational fishing is a popular pastime undertaken by millions of Australians each year. Despite its popularity, relatively few studies have examined the social and economic contributions of recreational fishing.

More than 20 years ago, the *National Recreational and Indigenous Fishing Survey* provided a national snapshot of recreational fishing participation, catch and effort. In the last two decades, Australia's population has grown and changed, becoming older, more urban, and more culturally diverse. At the same time, there has been evolving understanding of how to assess the social and economic contributions of activities such as recreational fishing.

In 2018, the Australian Government funded the *National Social and Economic Survey of Recreational Fishers*. The aim of the study was to better understand the social and economic contributions of recreational fishing in Australia, and to identify how to best assess these contributions using cost effective methods. This work was done in collaboration with the Australian Recreational Fishing Foundation.

The survey found that more Australians are going recreational fishing than ever before, with one in five people fishing. Recreational fishers contributed \$11 billion a year to the Australian economy and 100,000 jobs. Most Australians found recreational fishing to be a highly acceptable pastime that was good for personal wellbeing, social connectivity, physical activity and environmental stewardship.

The number of people going recreational fishing has increased

The popularity of recreational fishing can be estimated by numbers and the proportion of people participating. This study found that a total of 4.2 million — or one in five adult Australians — participate in recreational fishing each year. In absolute numbers, recreational fishing participation has increased in Australia since 2000

(then estimated to be 3.4 million). This is not unexpected given that Australia's population has also increased over the same period. However, the proportion of recreational fishers in the population has remained relatively stable, indicating little change in the popularity of recreational fishing.

4.2 Million
recreational fishers
per year **in Australia**



of the Australian
population

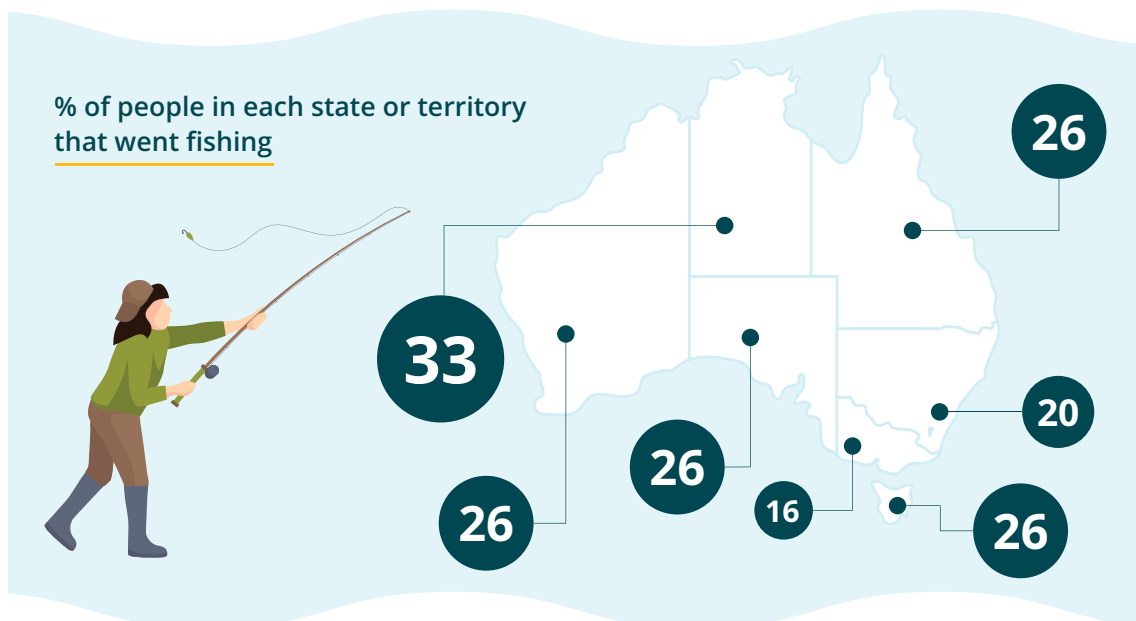
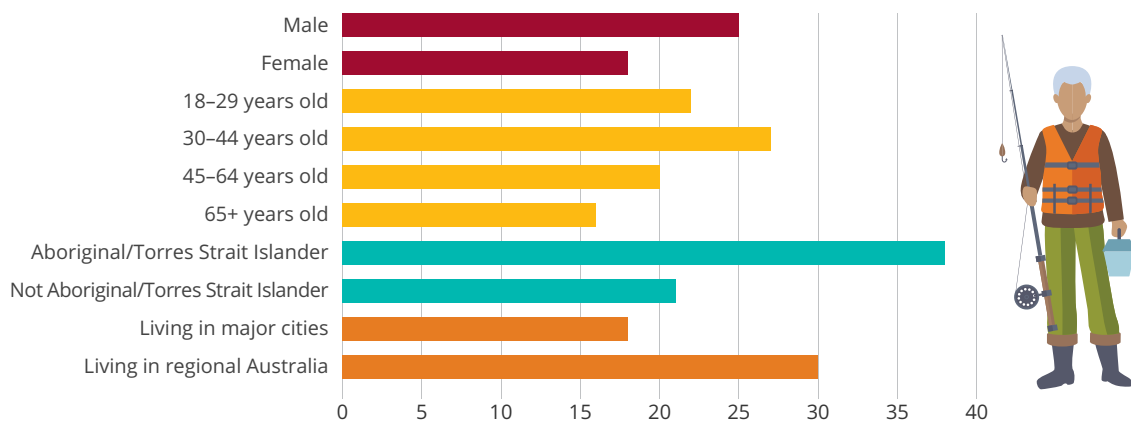


Participation varies

Participation is higher amongst people living in regional areas than in major cities. Participation is also higher amongst men, younger age groups and Aboriginal and Torres Strait Islander people. While participation in fishing becomes less common as people age, those who are still fishing into older age tend to go fishing more often than some of their younger counterparts.

Participation rates in the Northern Territory were higher than those in Victoria and New South Wales (including the Australia Capital Territory). However, the large populations of Victoria and New South Wales means that there are a larger number of recreational anglers in these states in absolute terms.

% of adult population who recreationally fish (per year)

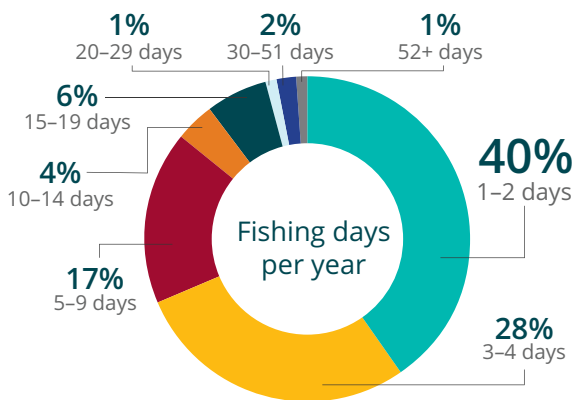


How often do Australians go fishing and why?

Australians spend an estimated 28 million days fishing each year. While most recreational fishers fish less than five days a year, a small proportion fish more than 52 days a year.

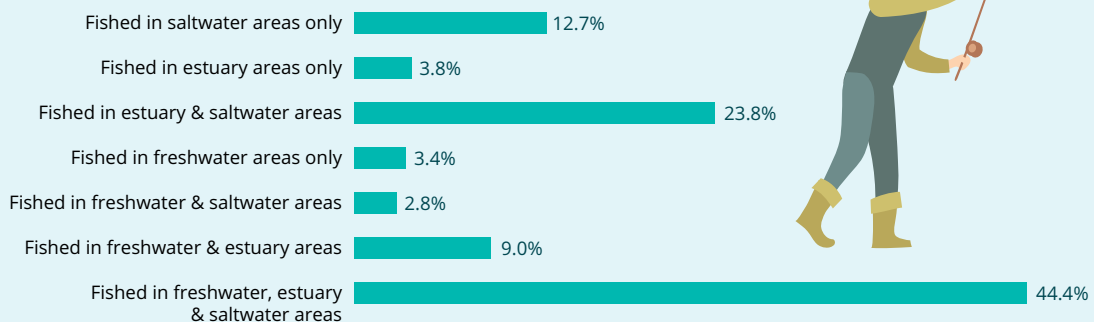
while very few fished more often than they wanted to. The most common reasons for fishing less than desired were work and home commitments, experiencing poor weather on fishing days, lacking an available fishing companion and poor environmental conditions.

A majority of fishers said that they fished less often in the last year than they wanted to,



“ Australians spend an estimated **28 million days** fishing each year ”

Fishing locations in last 12 months



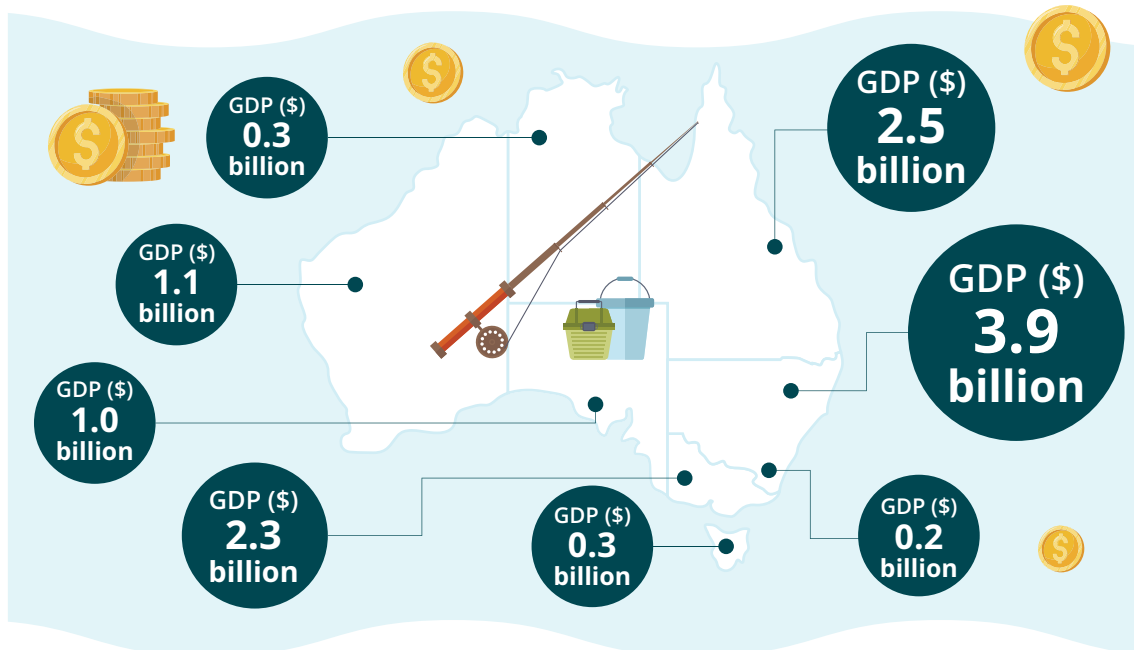
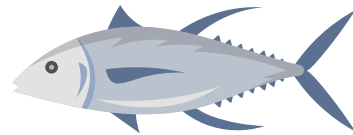
A significant contributor to the economy

Spending by recreational fishers contributes to the economy across Australia. This could be direct spending by a recreational fisher on bait and tackle or indirect or flow-on spending by a business related to recreational fishing. This study found recreational fishing contributes to employment of over 100,000 jobs and over \$11 billion per year to the Australian economy, with flow-on contributions being larger than direct contributions. The contributions to economies are higher in capital cities than regional areas. This is driven by the larger amounts of flow-on contributions occurring in capital cities, even though direct contributions tend to occur in the regional areas that recreational

fishers often visit. When split between states and territories, these contributions were higher in New South Wales, Queensland and Victoria who have relatively larger populations.

Importantly the contribution estimates such as those provided by this study should not be used as the basis for making decisions regarding resource access or allocation between one sector and another. This is because these types of statistics simply tell a story about how a sector is currently contributing to the economy rather than how that contribution would change if resource access or allocation was altered.

“ recreational fishing contributes over **100,000 jobs** and over **\$11 billion per year** to the Australian economy ”

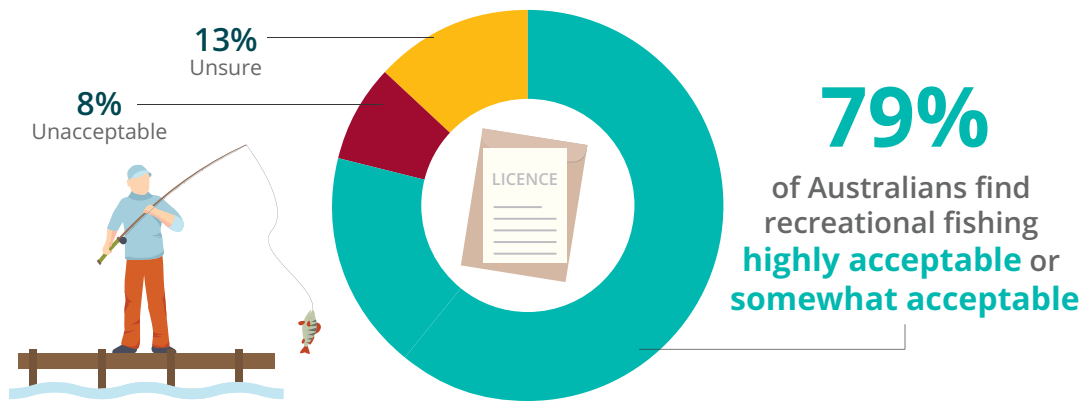


Social licence

Having a 'social licence to operate' is increasingly recognised as critical to the long-term future of many activities. This study found that most Australian adults, including both fishers and non-fishers, consider recreational fishing to be an

acceptable activity. Support was highest among males and those living in regional or remote areas. However, younger people were somewhat less likely to find recreational fishing an acceptable activity.

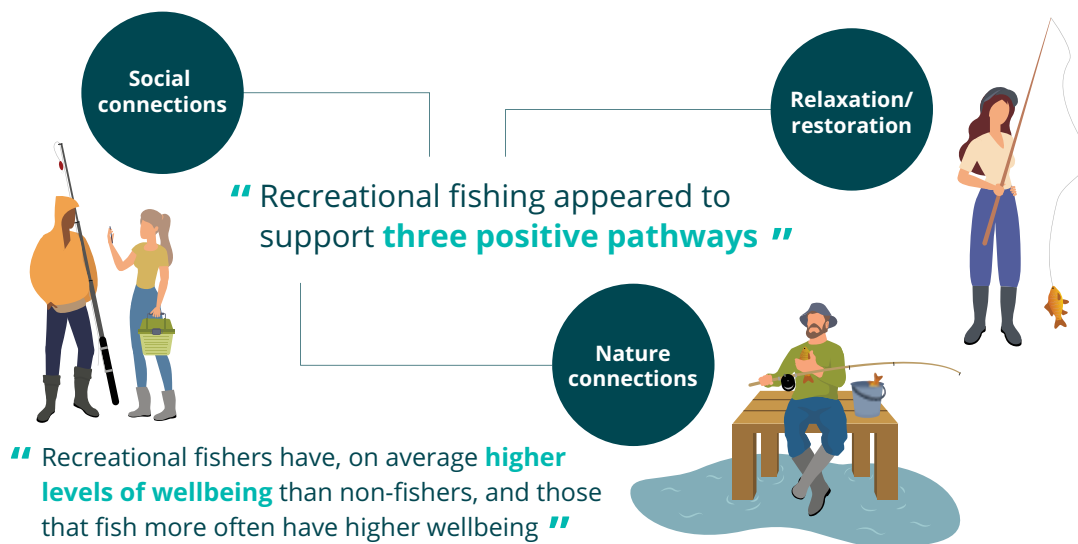
Level of acceptability



Wellbeing

This study found that recreational fishers have, on average, higher levels of wellbeing than non-fishers, and that those who fish more often have higher wellbeing. It also found that amongst those who experienced challenging life events — such as divorce, job loss, death of a loved one, or a major illness — those who continued to go fishing experienced less loss of wellbeing compared to those who did not continue to go fishing.

Going fishing may influence wellbeing through several wellbeing pathways. This means that going fishing has a positive impact on specific aspects of a person's life known to be important to wellbeing. In this study, three pathways were found to be particularly important: recreational fishing appeared to support positive social connections, nature connection, and relaxation/restoration.



Recreational fishing contributes to a healthy lifestyle

Being physically active is important for a person's health and wellbeing – but many Australians do not achieve the minimum levels of physical activity recommended in national guidelines. Going fishing helps many fishers be physically active, however, for most Australians fishing contributes a relatively small amount of their physical activity needs.

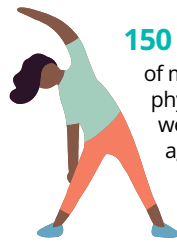
While a typical fishing trip can contribute significantly to achieving recommended levels of physical activity in the week the person goes fishing, most fishers go fishing less than five times a year, meaning that across the year, fishing makes a small

overall contribution to achieving healthy levels of physical activity.

Shore-based fishers are slightly more physically active than boat-based fishers, and males tend to be more active during fishing than females. For 'avid' fishers — those who go fishing frequently — fishing can contribute a relatively large proportion of the minimum levels of activity recommended.

Fishing can be relatively more important for fishers aged 65 years and older, as older fishers are less likely to engage in other physically active forms of recreation.

Australia's Physical Activity and Sedentary Behaviour Guidelines recommend Australian adults should accumulate a minimum of:



150 Minutes

of moderate intensity physical activity each week for those aged 18 to 64



30 Minutes¹

of moderate intensity physical activity on most, preferably all, days for those aged 65 years and over

For recreational fishers the minutes of moderate intensity physical activity per trip



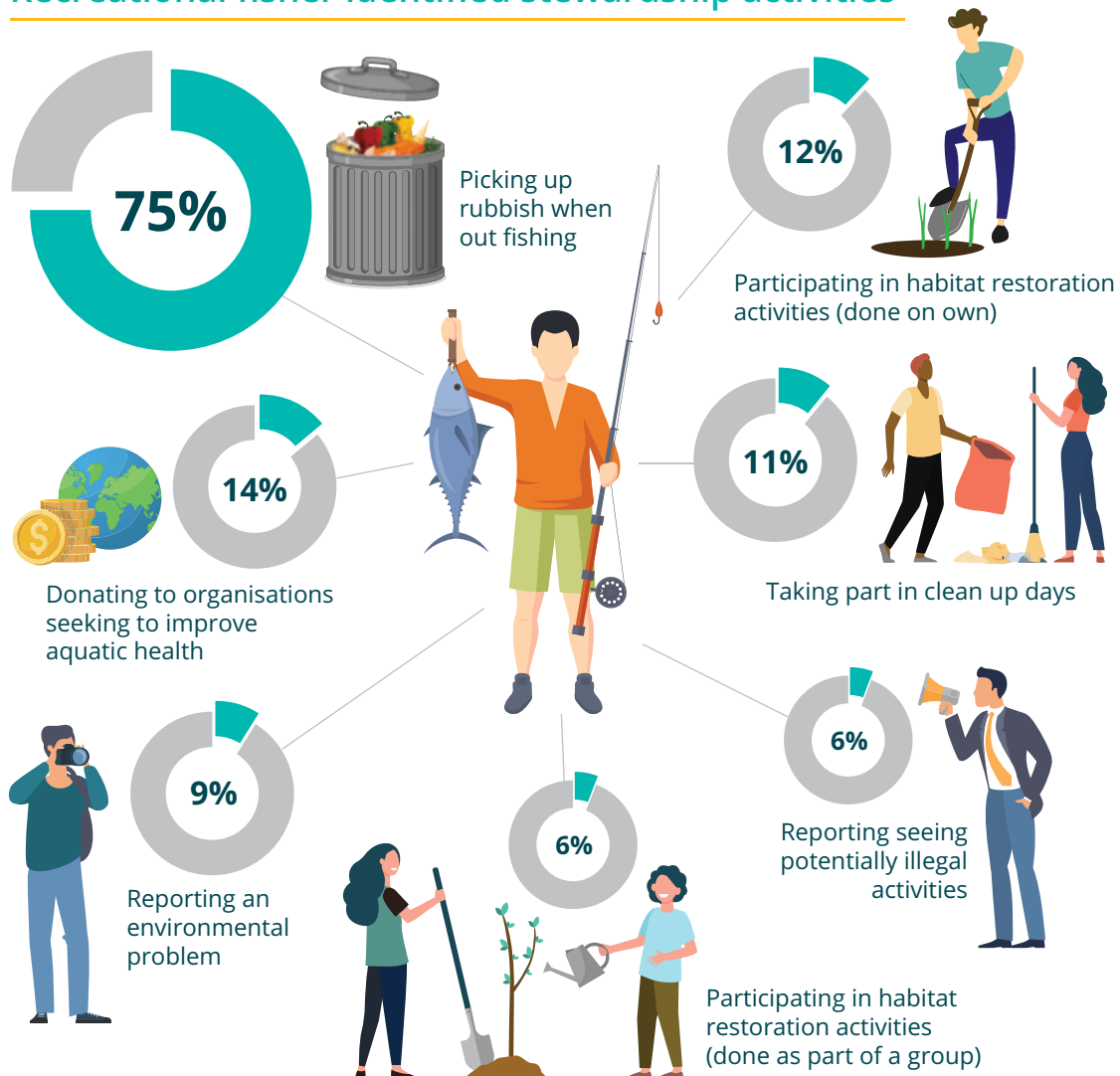
1 This study estimated this to be 4 lots of 30 minutes (or 120 minutes) of moderate intensity physical activity per week.

Environmental stewardship

Being a good steward of the environment is an important aspect of fishing and most recreational fishers feel confident that they have the skills they need to fish responsibly and with care for the aquatic environment. However, those who fish only occasionally, typically feel less confident in this.

The most common way that recreational fishers contribute to environmental stewardship is through picking up rubbish when out fishing. While some recreational fishers currently participate in data collection activities that support fisheries science or scientific assessments, many more are willing to get involved in the future.

Recreational fisher identified stewardship activities²



² Some fishers do more than one of these activities.

If people aren't fishing, what else do they do?

Australians enjoy a range of recreational activities from surfing to clothes shopping. As part of examining social and economic contributions of fishing, it is important to understand whether fishers feel they can substitute other activities for recreational fishing, and which activities are more and less likely to be considered alternatives to fishing. Most recreational fishers participated in at least one recreational activity other than fishing that they would be equally likely to choose to do on a nice weekend. Camping, outdoor picnics and barbecues, four-wheel driving and kayaking/canoeing are the most common substitutes for fishing. However, some fishers consider

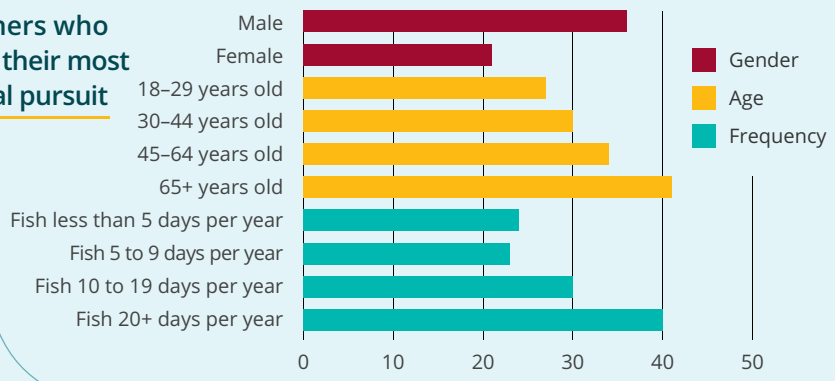
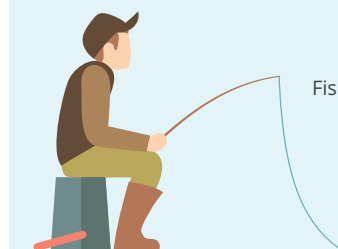
recreational fishing to be their most important recreational activity, particularly among male fishers, fishers older than 60, and those who go fishing frequently.

Disruptions to recreational fishing from the COVID-19 pandemic were a chance to observe activity substitutions over short timescales. During the first COVID-19 lockdown in 2020, the activities that fishers most commonly did in place of fishing, due to being unable to go fishing, included chores around the home and home renovation projects, cycling, swimming, walking, gardening and home entertainment.

Recreational activities most commonly considered to be substitutable for fishing



% of recreational fishers who consider fishing to be their most important recreational pursuit



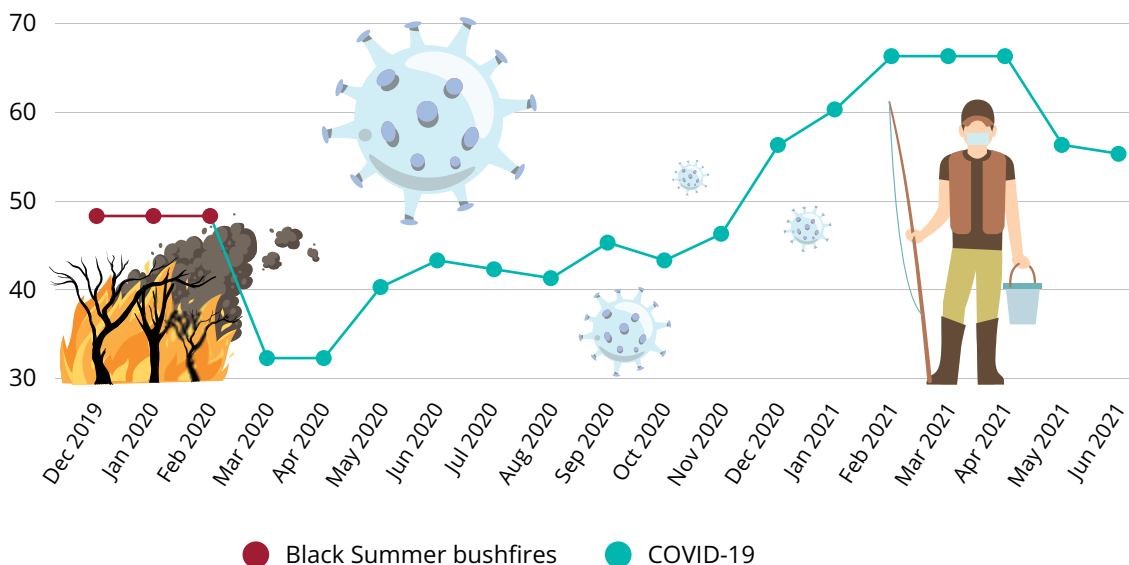
Bushfire and COVID-19 impacts

Participation in outdoor activities can change over relatively short periods of time and may be affected by extreme weather events such as drought, and disasters such as bushfires and floods. During the time this study was conducted, Australia experienced one of the worst bushfire seasons on record, the Black Summer bushfires, which impacted large swathes of eastern Australia from July 2019 to March 2020. Following the Black Summer bushfires was the COVID-19 pandemic which led to restrictions on movement and non-essential services across Australia from late March 2020. These events presented an opportunity to better understand how recreational fishing may change in response to large scale disturbances.

Recreational fishers surveyed repeatedly from 2019 to 2021 reported fishing less during the Black Summer bushfires. A reduction in fishing due to the fires was most common amongst fishers living in Victoria and New South Wales (including the Australian Capital Territory) where the bushfires were most widespread.

The first year of the COVID-19 pandemic and subsequent lockdowns in the following year were also associated with a decline in frequency of fishing among recreational fishers. The worst effects were felt in March and April 2020 when nation-wide restrictions on movement, and a recreational fishing ban in Victoria, were in place.

% of recreational fishers fishing more or the same than 12 months earlier



New survey methods

Online surveys have promised the ability to more cost effectively conduct surveys. However, achieving robust findings from surveys has been challenged by declining survey response rates, decline of useful databases, and growing use of untested non-probability-based techniques.

This study trialled the use of several different, but complementary methods to recruit survey participants and enable them to complete surveys either online or on paper forms. This novel work reduced survey costs while ensuring robust survey data.







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