

Executive Summary:

Economic Impact of Recreational Sea Angling in Scotland



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ISBN: 978-0-7559-8130-4

Fishing Communities & Inshore Management Team
Marine Scotland – Sea Fisheries Policy
Room 511
Pentland House
47 Robb's Loan
Edinburgh
EH14 1TY

Tourism
Promotion of Scotland and Tourism Division
Culture, External Affairs and Tourism
Area 2-J North
Victoria Quay
Edinburgh EH6 6QQ

Produced for the Scottish Government by RR Donnelley B61549 7/09

Published by the Scottish Government, July, 2009

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Division of Public Policy



Grid Economics

Cogent Research International Ltd.

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Economic Impact of Recreational Sea Angling in Scotland

Prepared for the Scottish Government

July 2009

A. Radford, G. Riddington and H. Gibson.

FOREWORD

The Scottish Government commissioned this study, which was undertaken by Alan Radford at Glasgow Caledonian University and Geoff Riddington of Grid Economics. Cogentsi Research International Ltd constructed the models of the regional economies. The work at Cogentsi Research International Ltd was undertaken by Professor Hervey Gibson.

ACKNOWLEDGEMENTS

Throughout this study a high level of assistance was provided by many individuals and organisations connected with sea angling. The authors are deeply indebted to the anglers who completed questionnaires. In addition, there were many individuals who provided valuable assistance and advice. Particular thanks go to Steve Bastiman, John Crowther, Robert Henderson, Rob Roberts, Ian Burrett, Eric McLean, Mike Horn, Gerry Wilson, Roy Anderson, Iain Rendell, Robbie Wells and Bill McLaughlan.

OUTPUTS

The output from the project exists in two forms:

- **Executive Summary**
An overview of the principal results presented at a high level of aggregation
- **Technical Report**
Provides a literature review, full details of all aspects of the research process, including construction of the models of the local economy and associated outputs.

EXECUTIVE SUMMARY

Previously, very little was known about the scale of sea angling, its distribution across Scotland, or the economic impact of sea anglers' expenditure. In these circumstances, it is possible that sea angling could have been over-looked when fisheries, tourism and coastal developments were being considered. The Scottish Government has sought to rectify this by commissioning this assessment of sea angling and its contribution to employment and income both in Scotland as a whole and its regions.

1 Objectives

The broad aims of the study were to:

- estimate the economic impact of sea angling,
- identify:
 - the important local sea angling centres;
 - the main competing areas within and outwith Scotland;
 - the principal characteristics of the sea angling sector;
 - the key trends and;
- consider future prospects for the sector.

2 Study Overview and Methods

Sea angling is a diverse activity in terms of the variety of species targeted, locations and participants. The larger the geographical area under consideration the greater is the possibility that this diversity might be obscured.

Regional approach. In recognition of this, the study partitioned Scotland into eight regions based largely around the new Economic Development Offices (which also function as Tourist Office regions). These were as follows:

- Argyll and Lochaber (southern half of the HIE area);
- Dumfries and Galloway;
- Glasgow and the West;
- Edinburgh and the East (including The Borders, Fife and Stirlingshire);
- the North East including Perthshire and Moray;
- The North (northern half of the HIE area);
- The Western Isles;
- Orkney and Shetland.

For each of the eight areas, as well as Scotland as a whole, the study was tasked with estimating such indicators as:

- overall sea angling activity levels, measured in angler days;
- the number of home and visiting anglers;
- the distribution of angler days across shore, private and charter boats;
- the target species;
- angler expenditure;
- the economic contribution of sea angling to regional incomes and employment.

Including Scotland as a whole, the study therefore aims to provide a detailed, quantitative assessment of the economics of sea angling across nine geographical areas.

In addition, five **case study areas** were selected, reflecting not only the diversity of characteristics but also contemporary issues relating to sea angling in Scotland. The case study areas were:

- the Upper Clyde Estuary;
- Luce Bay (Dumfries and Galloway);
- Orkney;
- Loch Etive (Argyll);
- East Grampian (between Stonehaven and Arbroath).

Survey Methods. Given the above objectives and the paucity of secondary data, extensive primary data needed to be collected from sea anglers and other stakeholders. The following broad strategy was developed:

- Sea angling questions were incorporated into a Scottish omnibus telephone survey.¹ The questions were designed to reveal the sea angling participation rate both across Scotland and in the eight regions. They also provided information on the characteristics of anglers and unbiased estimates of: the total number of days anglers devote to sea angling, the proportion of sea angling undertaken in their own region and the distribution of angler fishing effort across shore, private boat and charter boat. In total, the sea angling questions were presented to 15,037 Scottish individuals. The sampling unit was Scottish adults. It was therefore necessary to use a combination of information from other surveys and published data to estimate juveniles and visiting sea anglers².
- An angler survey was used to identify: the distribution of visits across the eight regions; angler expenditure per day; species fished; specific locations used; angler opinions and trends in fishing activity. An internet questionnaire was authored, piloted, amended and loaded to a Glasgow Caledonian University server. Awareness of the questionnaire's URL among sea anglers was facilitated through press coverage and the distribution of thirty five thousand postcards to tackle shops, angling clubs and charter boat proprietors and other providers of angling services.
- A Stakeholder Survey. A list of key personnel within the wider sea angling community was established encompassing anglers, tackle shop owners, charter boat operators, sea angling officials, hoteliers, boat suppliers and repairers, owners of caravan and campsites. Some were telephoned, whilst others were visited. A questionnaire was used to provide a common framework for each discussion. This survey informed a SWOT analysis and the assessment of sea angling trends and prospects.
- On-Site Surveys were used to provide insight into juvenile expenditure and activity levels.
- With respect to case study areas, less precise estimates of the economic contribution of sea angling were developed using a top down approach based on interviews with suppliers of angling services (tackle shops, charter vessels, self drive rentals, boat and outboard suppliers, hotels, B&Bs, caravan parks, camp sites, self-catering accommodation). Many of these also provided input to the stakeholder survey.

¹ Undertaken by Progressive Ltd of Edinburgh.

² The UK Tourist Survey, The UK Time Use Survey (2000), The TNS Fishing Report (2007).

An overview and summary details of the surveys are given in the Table below:

Table 1. Surveys Undertaken and Utilised

Name	Commissioned by	Conducted by	Method	Size	Key Data Obtained
Scottish Omnibus	This Study	Progressive Partnership	Telephone	15,037	Participation Rate by Region. Angler Characteristics. Number of Days by broad destination and type.
Internet	This Study	Research Team	Internet	501	Expenditure. Destination of trips away from home region. Substitution. Species fished. Locations Used. Changes in Fishing Activity. Activity Days per Trip.
UK Tourist Survey	VisitScotland et al	TNS	Household & Individual Face to Face	97,000	Number of trips to Scotland for Fishing.
Fishing Report	VisitScotland	TNS	Activities Panel Mail Survey	1,452	Percent of anglers who go sea fishing. Activity Days per Trip.
Time Use Survey	ONS		Household & Individual Face to Face	12,000	Juvenile to adult ratios in sea angling.
Stakeholder Survey	This Study	Research Team	Face to Face, Telephone	95	Activity and expenditure in case studies. Trends and Prospects.
Angler On-Site	This Study	Research Team	Face to Face	120	Juvenile expenditure. Trends and Prospects.

3 Key Concepts and Estimation Procedures

The distribution of both days fished per angler and expenditure per sea angler day were found to be highly skewed. Contemporary research suggests that when skewed distributions are found Robust Estimates based on the trimmed means are more accurate. In this study, angler activity levels and expenditure are presented using Robust Estimates based on the 5% trimmed mean³.

The full effect on regional income and employment of each pound of the (Robust) sea angler expenditure depends on what the angler purchases and the strength of the **direct**, **indirect** and **induced** effects. The regional **direct effect** is the increase in regional local income and employment arising directly from sea angler expenditure. Through a combination of taxation and the purchase of supplies from outside, a proportion of angler expenditure will be immediately lost to the region, and can be ignored. The proportion remaining creates the direct effect on those supplying angling services such as hotels, angling charter businesses, tackle shop etc. **Indirect effects** arise from the direct effect. For example, a local hotel may purchase butcher supplies from within the region. In turn, the local butcher may purchase supplies from the local abattoir who may take supplies from local farms. Thus, the income of a diverse range of jobs and household incomes in the region will ultimately be dependent on sea angler spending. Also a proportion of the regional income that is dependent on sea angling will also be spent on goods produced

³ The Annex of the Main Report contains estimates using untrimmed means. These estimates are much larger than the Robust Estimates.

within the region, creating further increases in regional income and employment. This is the **induced effect**. The direct, indirect and induced effects were modelled for each of the nine geographical areas using the Detailed Regional Economic Accounting Model (DREAM®) developed by CogentSI⁴.

In regional economic analysis, there is an important distinction between economic activity **currently supported** by angler expenditure and the **economic impact of** angler expenditure. The former simply describes the regional household income and employment that is currently dependent on the current expenditure of sea anglers. Economic impact assessment seeks to estimate what would happen within the region if sea angling ceased completely. In such a scenario, some sea angler expenditure would switch to other substitute activity in the region (e.g. brown trout, hunting, golf) thereby supporting other jobs in the region. Crucially, a proportion of sea angler expenditure would be diverted outside the region creating a net loss of jobs and income. The internet survey specifically asked sea anglers what they would do if sea angling ceased. From their responses, the study is able to undertake a substitution analysis which estimates the net loss in regional expenditure, income and employment. The 'economic impact' of sea angling is this net loss of income and jobs.

4 Principal Results

In this Executive Summary it is not feasible to present the detailed results for each of the eight regions. The main report should be consulted for details by region of:

- the popular shore and boat locations within the region;
- the target species in the region;
- the expenditure by category, by angling type (shore, own boat, charter) and by visitor type (Home, Scottish, Rest of the UK);
- direct, indirect and induced expenditure, multipliers, jobs and income currently supported by angler expenditure;
- the substitution patterns for each angler visitor type;
- the jobs and income that would be lost if angling ceased.

Similarly, the main report should be consulted for detailed description and discussion relating to the five case study areas.

The main Report is available online at <http://www.scotland.gov.uk/seaanglingstudy>.

4.1 Scottish and Regional Angler Effort and Expenditure

The Table below summarises the estimates of adult angler activity and expenditure occurring in each region and in Scotland as a whole. It is estimated that 125,188 adults went sea angling in Scotland (plus some 23,445 juveniles).

From the first column, it can be seen that Glasgow and the West has the greatest number of adult resident sea anglers (23,548 anglers). From column two, it also has the greatest number of angler days (269,783 days), despite relatively poor sea angling. From column five, Edinburgh Fife and the South East Region has the greatest total expenditure (£26.896m). Total expenditure on sea angling across the whole of Scotland was £140.868m.

A recent study of the economic contribution of Scotland's game and coarse angling estimated that game and coarse anglers spent a total of £131m (salmon and sea trout

⁴ Cogent Strategies International Ltd, Killylung House, Dumfries DG2 0RL, Scotland.

£85.6; brown trout £17.2m; rainbow trout £22.6m; coarse fish £5.76m)⁵. It would appear that, in terms of angler expenditure, sea angling is as significant as all Scottish freshwater angling combined.

Table 2. Estimated Regional Sea Angling Activity and Expenditure (£'000s)

Region	Number of Resident Sea Anglers ⁶	Annual Sea Angler Days in Region	Annual Trip Expenditure in Region	Annual Capital Expenditure in Region	Total Annual Sea Angler Expenditure
Argyll & Lochaber	5,825	252,615	£16,744	£5,879	£22,623
Dumfries & Galloway	3,224	233,080	£16,247	£9,048	£25,294
Glasgow and West	23,548	269,783	£16,481	£7,645	£24,126
North East Scotland	8,904	234,307	£9,818	£5,659	£15,477
Northern Scotland	7,894	144,346	£8,909	£2,251	£11,160
Edinburgh, Fife and South East	20,455	250,868	£13,902	£12,994	£26,896
Western Isles	2,515	80,567	£5,518	£3,672	£9,190
Orkney & Shetland	2,823	74,640	£3,949	£2,153	£6,102
Outwith Scotland	50,000	NA	NA	NA	NA
Total	125,188	1,540,206	£91,567	£49,301	£140,868

The Table below summarises the net inflow or outflow of angler activity and expenditure. From the first column, Glasgow and the West also has the greatest net export of adult angler effort (150,798 days). Associated with this, there is a net outflow from the region of £11.377m of sea angler expenditure. In contrast Dumfries and Galloway, which has a better reputation for sea angling, has the largest net inflow of sea angler effort (213,906 days), and the greatest annual net inflow of expenditure £23.793m.

⁵ Radford, A. and Riddington, G. (2004) The Economic Impact of Game and Coarse Fishing in Scotland. For SEERAD, November 2004.
<http://www.scotland.gov.uk/Publications/2004/06/19506/38879>

⁶ This is number of resident sea anglers who fished in Scotland during the last year.

Table 3. Net Flow of Angler Activity and Expenditure (£'000s)

Region	Annual Net Inflow (+) and Outflow (-) of Angler Days	Annual Net Inflow (+) and Outflow (-) of Angler Expenditure
Argyll & Lochaber	121,947	£11,164
Dumfries & Galloway	213,906	£23,793
Glasgow and West	-150,798	-£11,377
North East Scotland	93,967	£6,902
Northern Scotland	25,308	£1,998
Edinburgh, Fife and South East	-91,661	-£2,123
Western Isles	44,737	£5,923
Orkney & Shetland	44,620	£7,117
Outwith Scotland	-302,026	-£43,398
Total	0	£0

4.2 The Economic Contribution of Sea Angling to Scotland

Table 4 below summarises sea angling's current economic contribution in terms of jobs and income supported as well as the net loss of income and employment if sea angling were to cease to exist. The table shows that, currently, sea angling supports 3,148 Full Time Job Equivalents (FTEs)⁷ and £69.67m annually of Scottish household income in the form of wages, self employment income, rents and profits. If sea angling ceased we could expect a net loss of **at least 1,675 FTEs** and annual income loss of **£37m**.

Table 4. Economic Contribution of Sea Angling

Currently Supported		Would be Lost	
Jobs	Income (£'000s)	Jobs	Income (£'000s)
3,148 FTEs	£69,670	1,675 FTEs	£37,042

4.3 The Economic Contribution of Sea Angling to Scottish Regions

Table 5 summarises the estimates for each of the eight regions. Note that the *jobs and incomes lost* would not be expected to sum to the Scotland equivalent figure because loss to one region normally results in gains in another and smaller loss to Scotland as a whole.⁸

Table 5. The Economic Impact of Sea Angling by Region

	Currently Supported		Would be Lost	
	Jobs	Income (£'000s)	Jobs	Income (£'000s)
Argyll & Lochaber	524	£8,446	392	£6,342
Dumfries and Galloway	534	£7,714	462	£6,670
Glasgow and West	523	£11,892	249	£5,657
North East Scotland	343	£7,319	226	£4,822
Northern Scotland	299	£5,009	167	£2,800
Edinburgh, Fife and South East	504	£11,866	397	£9,370
Western Isles	184	£3,172	117	£2,028
Orkney & Shetland	145	£2,498	96	£1,657

⁷ A single FTE could be one full-time all year post, or two part-time jobs, or two seasonal jobs, or four part-time seasonal jobs. Thus, 3148 FTEs could translate to, say, the jobs of over 4,000 individuals.

⁸ The Scottish total for jobs and income *supported* was estimated by running a model of the Scottish economy and not by summing the totals for each region. Because of these procedural differences, there will be slight differences between the Scottish total and the regional sum, though conceptually they should be identical.

4.4 The important local centres for sea angling in Scotland

Table 6 identifies the number of internet respondents who identified a particular location they used for own boat charter/launching.

Table 6. Twenty Six Most Popular Launch Sites.⁹

Launch Site	Number	Launch Site	Number
Drumore/Portpatrick	115	<i>Taynuilt/Bonawe</i>	25
Luce Bay	112	Rothesay	23
Oban	82	N. Berwick	23
Arbroath	65	Ardrishaig	22
Whithorn	51	Peterhead	21
Stranraer	49	Lochgilp	19
Dunbar	47	Tobermory	19
Thurso	43	<i>Loch Aline</i>	18
Girvan	43	Ayr	17
Sunart	40	<i>Port Logan</i>	12
Inverclyde	30	Crinan	12
Stonehaven	27	Lochinver	11
Stornoway	25	Wick	9

Table 7 below, identifies the number of internet respondents who identified a particular location they used for shore angling.

Table 7. Thirty Most Popular Shore Areas

Shore Area	Nos	Shore Area	Nos
Luce Bay	153	Nigg to St Cyrus	68
Mull of G to Stranraer	151	N.Clyde	68
Fyne	132	Nairn to Peterhead	61
Etive	120	St.Andrews -Earlsferry	56
Gareloch/Loch Long	112	Cruden Bay to Nigg Bay	55
St Cyrus to Montrose	102	Inner Forth	53
West Kintyre/Oban	96	Morvern-Mallaig	51
Wigton Bay	95	Cowal/Bute	49
N.Berwick-St Abbs	90	Skye	45
Inner Solway	89	Kyle -Ullapool	43
Ballantrae to Wemys Bay	84	South Tay	42
Lorne/Linhe	79	Cumbræ	41
Inverclyde	75	Newport-St Andrews	38
South Queensferry - Nth Berwick	75	Ullapool-Durness	37
Peterhead to Cruden Bay	68	EarlsFerry-Inverkeithing	34

4.5 The main competing areas both within and outwith Scotland

It seems that sea anglers will participate provided there is the reasonable prospect of catching fish. For many anglers the main determinant of fishing mark is distance from

⁹ Names in italics were not on the drop down menu in the internet questionnaire but were written in by respondents.

home. Nearly 43% of Scotland's population resides within 5km of the shore and the participation rate in these "coastal" areas is double that of inland areas.

The combination of fish stock characteristics and abundance, the local physical geography and the size of the local population will largely determine the extent and type of local sea angling. Dumfries and Galloway, particularly Luce Bay and the Mull of Galloway, have relatively sheltered waters, good shore access and a variety and reasonable abundance of sea fish. It therefore supports shore, own boat and charter sea angling. Indeed, the majority of the sea anglers are visitors to the region. In contrast, the Firth of Clyde has relatively poor fish stocks and is not capable of supporting regular charter activity, though the local population size means there are reasonable numbers of local (shore) anglers who rely heavily on migratory fish stocks such as mackerel. Own boat and charter boat angling is popular elsewhere on the West Coast where there are a number of excellent sheltered lochs enabling safe comfortable fishing. In Orkney, shore angling and own boat angling is largely undertaken by local anglers, though fish abundance and variety is sufficient to attract visiting charter anglers. Along the East Coast, there are charter vessels out of Arbroath and to a lesser extent Stonehaven. On this coast, shore angling is relatively more popular as there are extensive beaches and, in winter, cod.

In every area, two of the three most popular fish are mackerel and pollack. Cod is now rare on the West Coast, whereas in the North East it is the most popular species. Dogfish appears to be a popular West Coast target with coley and flatfish forming a second tier of target species. Further details of the relative popularity of each species in each region are given in the main report.

Specialist and competition anglers are willing, regularly, to travel further and the attraction is often the size of the fish. Among other possibilities, Scotland offers the prospect of catching tope in Luce Bay, porbeagle in the Northern Isles and North Coast, rays/skate in Argyll and in the Western Isles and conger in Orkney.

Within the UK, sea anglers identified the South Coast of England and Cornwall as alternatives to charter boat angling in Scotland. Internationally, many sea anglers fish, or aspire to fish, in Norway, Iceland and Ireland. Although expensive, Florida and the Caribbean are regarded as offering good value for money because of the size, variety and quantity of fish that could be caught.

4.6 The principal characteristics of the recreational sea angling sector

Sea angling is an activity carried out by all ages and classes roughly in line with the proportion in the population at large. Middle aged, skilled working men form a group somewhat larger than their proportion in the population. Juveniles, however, are relatively more likely to fish than their elders and men almost six times more likely than females. By its nature sea angling can be an activity for all the family and many women seem to participate as part of the family experience.

The number of days fished by each person is extremely wide with a trimmed mean of 5.46 for anglers from the rest of the UK and 16.85 for Scottish sea anglers giving an overall 12.30 days per angler. However these figures mask massive variations with some anglers reporting over 200 or even 300 days per annum but 51% reporting less than 10

Expenditure is similarly widely spread with some individuals, particularly, but not exclusively, own boat anglers spending as much as £10,000 a year in total on their sport and others (such as juveniles) spending less than £50. The trimmed mean cost of a days adult sea angling, including allowance for capital spend on items like rods and boats comes to a surprisingly high £110 per day. The mean annual expenditure in Scotland by adult sea anglers was £1,516.

4.7 The key trends in the sector

In the 1970s and 1980s Scottish tourist and angling publications proclaimed that Scotland offered exciting sea angling, record sized fish and that the country comprised Europe's greatest untapped potential angling grounds.¹⁰

There is a belief among sea anglers that this untapped potential has not been realised. Most participants in the stakeholder survey believed that there were fewer sea anglers now than 20 or 10 years ago and they also expected the downward trend to continue. Indeed, the Firth of Clyde case study revealed evidence to support the view that, in the Clyde, angling has declined significantly, largely because of a decline in sea fish abundance.

On the other hand, respondents to the internet questionnaire revealed that their activity was very similar or slightly higher than levels 20 and 10 years ago. The exception was anglers from Glasgow and the West where the decline of fish stocks in the Clyde has had serious repercussions on participation. It should also be recognised that those who are disillusioned, or have given up, would probably not complete the internet questionnaire. Consequently, the decline revealed by the stakeholder survey could be more reliable than the apparent slight increase reported by internet respondents. For those internet respondents whose activity levels have increased the key determinant was an increase in their leisure time. This is likely to continue. For those whose activity levels had decreased the major reason cited was lack of fish.

5 The future prospects for the sector

There is significant potential for growth in Scottish sea angling. Scotland has many beautiful, peaceful, un-crowded angling areas, an extensive range of native sea species many of which are still available, a diverse shoreline and safe sheltered coastal waters offering the possibility of all year round fishing. The coastal communities themselves have excess capacity of visitor accommodation and an enviable reputation for welcoming visitors. There is an infrastructure of breakwaters, harbours, piers and slipways and an emerging network of Scottish marinas for berthing and maintaining own boats, particularly on the Firth of Clyde and the West Coast. An established system of sea angling clubs exists to encourage sea anglers to develop their interest and participate in competitions. Additionally, sea angling can be a healthy outdoor activity in which whole families can participate. It can promote mental and physical well-being, and, in some areas, participation may reduce youth crime. The inexpensive start up costs and the absence of access or licence charges mean youngsters and individuals on low incomes are able to start and to participate regularly.

There is evidence from abroad, particularly in the USA, that improvements in the quality of sea angling generate very substantial increases in angling activity, incomes and employment. If Scotland were to achieve a 50% increase in sea angling activity levels this would secure a minimum of 1,675 FTEs and could possibly add a further 840 FTEs. The difference between the loss of sea angling and its enhancement could be 2,515 FTEs.¹¹

¹⁰ For example, Scotland For Sea Angling, 1973, Scottish Tourist Board and Scotland, 1987, For Fishing. Produced by Pastime Publications (Edinburgh) and distributed by the British Tourist Authority

¹¹ These are indicative based on an assumption of linear relationships.

It may be possible to achieve some growth simply by more energetically promoting sea angling and hoping that increased participation will subsequently lead to greater investment in businesses supplying angler services. The problem is that the returns from promotional initiatives could be low if the perception among stakeholders remains one of long term decline. The key to unlocking the potential of sea angling is to ensure the availability of fish stocks for anglers to catch. There are concerns that underlying uncertainty about fish stock abundance deters new entrants, reduces the willingness of anglers to invest in capital equipment (e.g. boats, engines, caravans) and undermines the confidence of those who might otherwise invest in sea angling services (e.g. charter vessels, tackle shops, accommodation services).

To the extent that the Scottish Government can influence the abundance of stocks exploited by sea anglers, it has an important role in sea angling's future. With the Scottish Government's recent publication of its Strategic Framework for Scottish Freshwater Fisheries and, given work in England and Wales, sea angling in Scotland may soon be the only major UK angling sector not underpinned by a government backed strategy, despite having an economic contribution similar to that of all Scotland's freshwater angling.

A strategy for Scottish sea angling that set out aspirations and priority actions for the protection and eventual further development of the sector would give those in the industry a greater confidence to invest and develop their services, and would enable effective promotion of Scottish sea angling by the appropriate agencies. On the other hand, a strategy that attached a relatively low priority to sea angling, whilst reducing the underlying uncertainty, might accelerate disinvestment and job loss.



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RR Donnelley B61549 07/09

ISBN: 978-0-7559-8130-4

Fishing Communities & Inshore Management Team
Marine Scotland – Sea Fisheries Policy
Room 511
Pentland House
47 Robb's Loan
Edinburgh EH14 1TY

Tourism
Promotion of Scotland and Tourism Division
Culture, External Affairs and Tourism
Area 2-J North
Victoria Quay
Edinburgh EH6 6QQ