

Fishing for a Future

**An Analysis of Need, Challenges
and Opportunities in UK Fishing
Communities**

An Interim Research Report by Cornwall Rural Community
Charity & Rose Regeneration on behalf of Seafarers UK

Welcome to Seafarers UK's Fishing For a Future

Fishing is a narrowly understood industry. Many people outside it assume it's now operating at an insignificant or, at the very best, extremely modest scale. However, it provides work for over 20,000 people and contributes over £1billion annually to the UK economy.

When Seafarers UK commissioned Cornwall Rural Community Charity (CRCC) to establish an overview of what is needed to address the socio-economic challenges in UK fishing communities, we hoped to obtain an evidence base to inform our strategic grant-making in the sector. From the interim findings reported so far, I believe we can hear the authentic voice of the fisherman and his family, direct from the port, on the needs and challenges they face every day at sea and onshore.

This interim research report reveals that the key issues to be addressed relate to: business support, port infrastructure, recruitment, access to capital and the ability to add value to the catch. However, safety standards also remain a significant issue. While it appears that fishermen are very aware of the lack of port infrastructure to support their business, the interim findings report very low levels of awareness of new regulations such as the International Labour Organisation's Work in Fishing Convention (ILO 188), which aims to improve the minimum standards for living and working in the fishing industry but which will also require significant change to vessels and practices. Other forthcoming changes, such as the impact of Brexit, are not yet known.

This work is timely in shining a light on a little understood community of resilient and resourceful fishermen who have often missed out on "one size fits all" social and economic interventions. In sharing these interim findings, we ask for your help to further inform the outcomes. Importantly, we would like to open a debate and stimulate discussion with others interested in supporting the fishing community.

Once the final research report is published in early spring 2018, our collective challenge will be to use the evidence collected to inject funding into potential interventions that can best help to address the issues facing fishing communities and help to realise the opportunities available.

The aim is that this research will provide an agenda for future action. Through collaboration and partnership we hope that together we can make a significant and sustainable impact at this time of change for the UK fishing community.



A handwritten signature in black ink that reads "Barry Bryant". The signature is written in a cursive, slightly slanted style.

Barry Bryant, Director General, Seafarers UK

Interim Research Findings

Seafarers UK commissioned Cornwall Rural Community Charity to establish an overview of what is needed to address the socio-economic challenges in fishing communities. This involved a comprehensive profiling of a sample of ports, a literature review, surveys of fishermen and health service providers in fishing communities, as well as a series of port visits to hear directly from fishermen.

Prior to publication of the final research report these interim research findings are shared with others interested in supporting the UK fishing sector. It is hoped that this will help to stimulate debate which will inform the final report.

The research evidence collected has identified a number of challenges. In response, interventions are proposed which could address the issues facing fishing communities and help them realise the potential opportunities available.

Today's Fishing Community

Many fishing communities have been in a process of gradual decline over the last 40 years. Fishing and fish processing as sectors now employ 22,000 people within the total UK stock of 28.5 million jobs¹. In 2015 people directly employed in fishing accounted for around 12,000 of the people filling these jobs². In 1987 the figure was approaching 25,000³. Over 20% of all those working directly as fishermen in the industry are non-EU workers⁴.

Fishing communities can suffer profound deprivation. A number of the ports profiled in this research are in relatively remote locations and act as the main economic driver for a large rural hinterland.

¹ Business Register and Employment Survey 2015

² Marine Management Organisation UK Sea Fisheries Statistics 2015

³ Ibid

⁴ Pilot Survey of Employment in the UK Fishing Fleet Seafish 2017

⁵ Marine Management Organisation: UK Fisheries Annual Statistics Report 2015.

Table 3.14: Landings into UK Ports by UK Vessels 2015

⁶ Classification of the 98 input-output industry/product groups by SIC (2007) classes - Scottish Government 2013

Fishing and fish processing employ 22,000 people

There is significant economic potential in the fishing sector which wider economic changes over the next decade will bring into sharp focus. An economic multiplier analysis indicates that 12,000 fishing jobs support a further 4,000 jobs in the wider economy and that the £552 million⁵ value of landings contributes that amount again in wider added value; making the overall impact of the UK fishing sector worth £1.14 billion⁶.

Overall impact of the UK fishing sector is worth £1.14 billion

Over the next decade, the impact of Brexit and new regulations are likely to cause significant changes to the operational context of the fishing sector, bringing new and potentially unexpected challenges and opportunities. This is why the publication of this research is particularly timely; it will support maritime charities such as Seafarers UK, Fishermen's Mission and others interested in the fishing sector, to better understand the most pressing needs. It is also hoped this research will shine a light on the key role that charities and others can play in supporting the potential opportunities and initiatives that will help tackle some of these needs.



Fishing Ports in the UK

To understand the nature of the fishing industry 41 fishing ports across the UK have been profiled and analysed in detail. This sample represents:

- 20% of all ports in the UK with over 5 boats;
- 43% of all boats in the UK;
- 52% of all fishermen by home port⁷ and
- 76% of all fishermen by administrative port⁸;
- 70% of the total value of all landings⁹ in the UK.

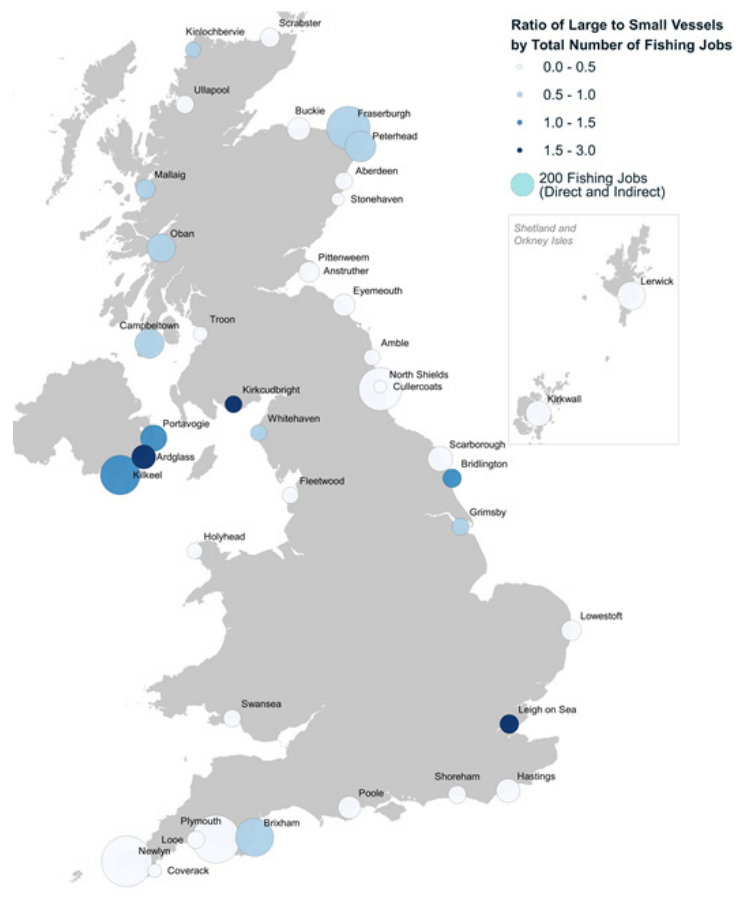
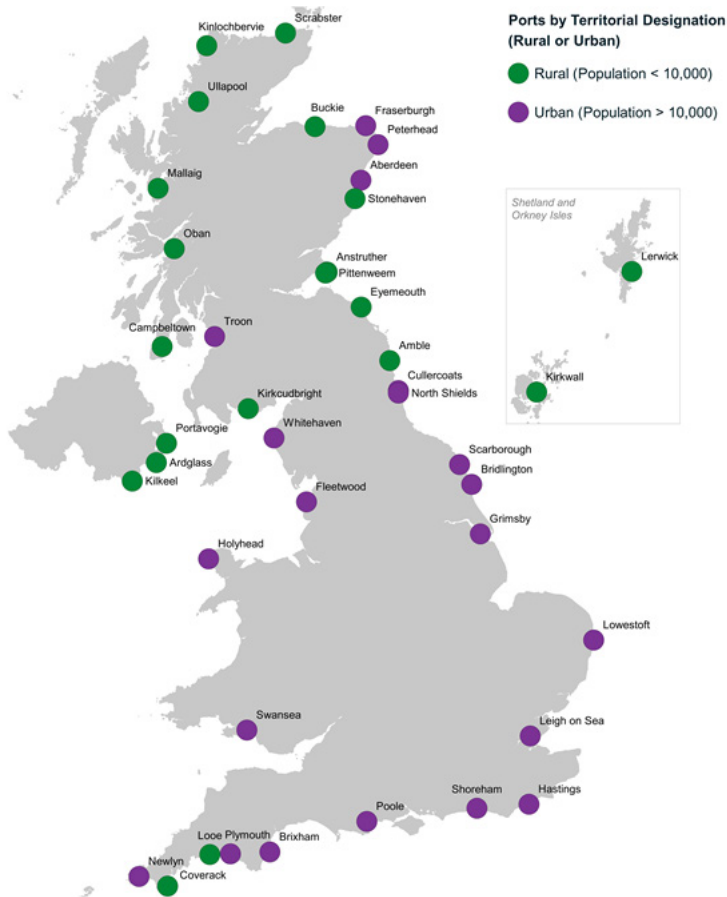
The maps below set out the key features of the ports for which profiles have been produced.

Headline findings from the analysis of 41 fishing ports revealed the following information.

High Levels of Deprivation

The most recent and relevant Index of Multiple Deprivation was used to measure the socio-economic characteristics of port neighbourhoods.

- 61% of the ports are deprived (using the same measure, by contrast, only 25% of the UK is deprived overall)
- 66% of the ports with significant landings are deprived



⁷ A vessel's home port is the port at which it is based, which may not be the same as its port of registry shown on its registration documents and lettered on the stern of the ship's hull

⁸ This is the port of registry. Note 7 also refers.

⁹ See www.gov.uk/government/news/fishing-industry-in-2016-statistics-published

Ratio of large to small vessels by total number of fishing jobs:

The colour of the dot represents the share of over 10 meter vessels as a proportion of all vessels – the darker the dot the higher the proportion. The size of the dot represents the overall number of jobs in the port – the bigger the dot the higher the number of jobs

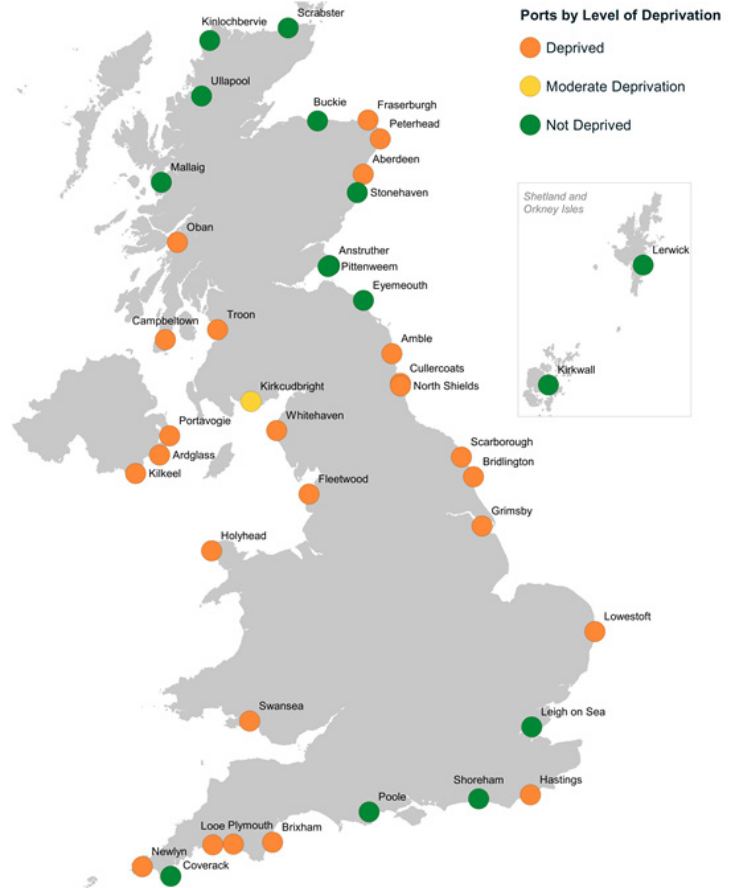
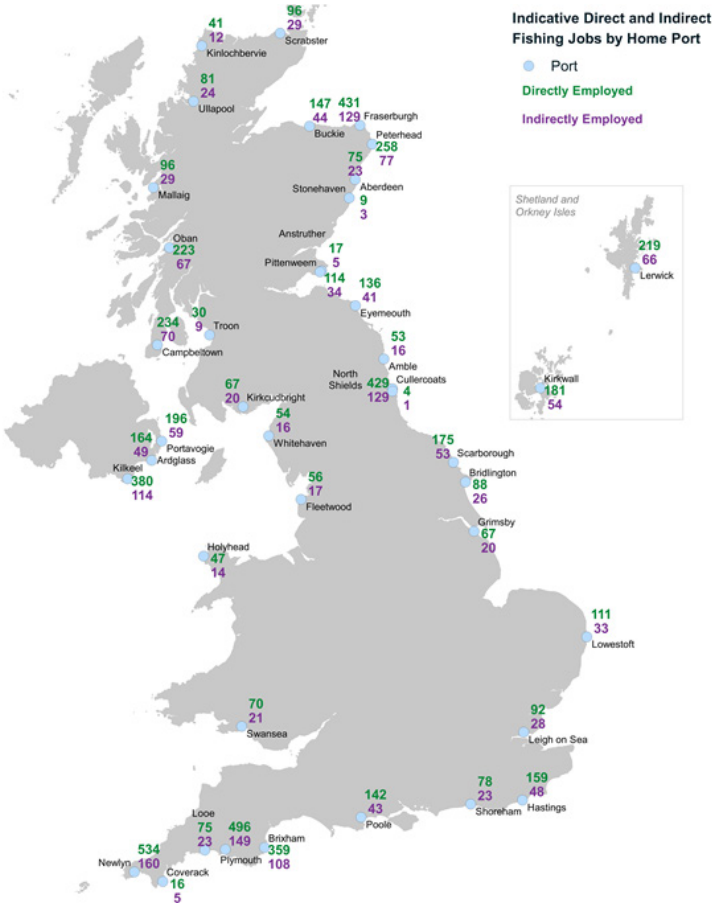
- 65% of the ports with a high ratio of larger boats are deprived; the figure is 46% for those with a high ratio of smaller boats
- 65% of the home ports with over 100 crew are deprived

Rural/Urban Divide

- 19 of the ports are rural and 22 are urban
- This high incidence of 46% rural ports compares to a UK average rural population of around 20%

Crew engagement

- 10 of the 20 ports with over 100 crew have a high proportion of larger boats over 10 metres
- 12 of the ports with over 100 crew have a high value of landings (due to investment in larger boats). For example Peterhead remained the port with the highest landings – 145 thousand tonnes with a value of £158 million.



Source: Most recent indices of deprivation collected by each national administration in the UK

Reviewing the Existing Research

A literature review focused on the socio-economic issues within fishing communities that have previously been identified, as well as some of the potential opportunities that exist. Interim findings are summarised below and full references will be available in the final research report.

Demographic Difficulties

- The industry has a declining and/or ageing workforce (FARNET, 2017; Reed et al, 2011; University of Aberdeen, 2002)
- The population of seafarers and their families is larger than most people think (which means its significance is often under-estimated) and is declining slowly: in 2015 there were 1.35 million people in the UK seafaring community, with higher than predicted numbers of Merchant Navy and Fishing Fleet seafarers and their families (Walker & Fairclough, 2017).
- Fishermen are skilled at what they do but often lack formal academic qualifications (Creative Research, 2009)
- A high proportion of fishermen have at least one disability/long-term illness affecting their everyday life (Opinion Research Services, 2016).

Economic Hardship

- The majority of fishing communities are in social mobility coldspots ie. where social mobility prospects are lower. With the exception of Copeland in Cumbria and Suffolk Coastal, all coastal areas in Great Britain are in the bottom 10% of the index. (Social Mobility Index, 2017).
- Recent reductions in public sector funding/ service provision and welfare reforms have led to greater needs among fishermen and fishing families (Opinion Research Services, 2016; Oxford Brookes University, 2015).
- Fishermen feel under constant financial pressure from issues such as the unpredictable nature of their earnings (Creative Research, 2009).



Barriers to Business Development

- The rising cost of entry into the fishing industry is a barrier (Plymouth Marine Laboratory and the Marine Biological Association, 2013).
- Migrant workers are seen as the solution to difficulties in recruiting from the local population who sometimes regard fish processing jobs as low wage work with unpleasant working conditions. (Jamieson et al, 2009).
- In many areas facilities are run down. Investment is needed to modernise equipment, vessels, technology and improve health and safety. This particularly impacts on smaller fishermen (Maillart et al, 2016).
- The inshore industry (ie. the fleet of boats under 10 metres) has reduced and business opportunities upstream have declined (Reed et al, 2011).





Potential Opportunities

Onshore integration and collaboration

- Fishermen are resilient - artisanal fishermen often cross-subsidise their fishing activities by taking supplementary employment onshore (Brookfield et al, 2005; The Scottish Government and Economic & Social Research Council, 2008).
- There is scope for greater integration of fishing with tourism, particularly through festivals and events (Reed et al, 2011; University of Aberdeen, 2002).
- There is scope to improve sea fisheries' science through collaborative work with fishermen (e.g. surveys, mapping) – helping address the current time lag between knowledge and action (Marine Planning Consultancy, 2015; Natural Scotland, 2005; Salmon et al, 2015; University of Ulster, 2013).
- Small-scale Producer Organisations (PO) give smaller boats a voice and greater control to help exert their influence in the fishing industry (NEF, 2016).

Localism

- There is opportunity around food branding to add value to fish caught locally (Reed et al, 2011) – this can mould consumer demand to the type of niche products which the fishing industry can supply (Brookfield et al, 2005).
- There is merit in looking at the role of the contribution of fishing to the local economy more broadly by analysing how much fishermen spend on suppliers and services – rather than looking at their catch/landings. This gives a more rounded view of the importance of the sector economically (Acott et al, 2014).

Encouraging the Next Generation

- The number of young people interested in seafaring more widely, which provides a pool of potential recruits for the industry, is high: 20,000+ young people are involved in sea cadets, naval cadets and sea scouts (Walker & Fairclough, 2017).
- There are opportunities around greater integration between fishing and education – encouraging young people to enter the industry (Corfe, 2017; FARNET, 2017) through promoting fishing as an 'occupation of choice' (Independent Panel, 2010).
- There are a number of case studies of actions developed with a view to helping fishermen to become and stay economically active (e.g. projects that enable injured and disabled fishermen to re-engage) (FARNET, 2017).



Fishermen's Views on Fishing

The research included two surveys; one is an extensive survey of fishermen's own views of the key issues impacting their lives. The second was a survey of health service providers in fishing communities. The most common views expressed by the fishermen are shared here.

Port Infrastructure

- The survey revealed inconsistency as to the quality of ports and port infrastructure.
- Users of smaller ports reported varied challenges ranging from parking to pleasure craft being prioritised over fishing boats.
- Management of harbours was often cited as a potential issue with some fishermen feeling that they were not well served.

Funding for Equipment and Access to Capital

- The survey revealed a number of comments relating to small-scale infrastructure requirements (ice, landing equipment etc.). It was clear that older fishermen feel that inadequate port infrastructure impacts their physical health and thereby limits their ability to continue their careers.
- Less than 50% of respondents have accessed any kind of funding. Many fishermen are discouraged by the level of paperwork associated with bidding for, and claiming, funding.

Workforce

- There was inconsistency in responses regarding the availability of, and interest in, training by fishermen. Many of those not accessing the opportunities open to them cited lack of time.

- A key issue cited by under 10 metre boat respondents was the uncertainty of the profession and the challenges that entails in respect of being able to guarantee regular work.
- Those who do engage crew raised a lack of interest, particularly amongst local people, as a real barrier to recruitment.
- Succession planning is a key issue. Many long established fishing families reported an enthusiasm for selling on their business; whilst those who have less of a family tradition appear keen to just exit the profession when they reach retirement.
- Overall, the survey results indicate that there is a danger that the skills base of long-term fishermen will not be replaced, particularly in smaller ports, when the current cadre of fishermen retires.

Quota

- A lack of access to, and uncertainty over, quotas was cited as a challenging issue.

Adding Value

- Most fishermen still sell their catch through local merchants and this can be a limiting factor in terms of their ability to add value to it locally.
- The survey identified interest in changing gear and methods amongst under 10 metre boats to add value to their catch.

Income

- Incomes are uncertain for many fishermen and this makes it difficult for them to plan; including in respect of engagement of fishing crew. It also affects their credit rating; making it difficult from a commercial and personal perspective, for them to make financial commitments.

Housing

- At present there is a high proportion of home ownership amongst respondents.
- Those fishermen who rent do so in the private rented sector.

Health

A survey was distributed to 70 health service providers located within fishing communities. Key findings are reported below.

Mental Health

The most frequently cited service that surgeries were unable to access related to mental health. This could be considered significant, given that that over 95% of fishermen responding to the main survey indicated they suffered from stress.

Dentistry

The number of dental surgeries able to offer flexible appointments to accommodate irregular/anti-social working hours was limited. Although 5 surgeries were able to provide or access dental outreach services, 4 of these were in the Scottish Highlands – this may be because of the dispersed nature of the area rather than in response to a specific recognition of the need to work flexibly to support fishermen.

The majority of surgeries were not aware of the help available from fishing or maritime community specific services such as Seafarers Hospital Society, Fishermen's Mission or Seafarers Advice and Information Line (SAIL).



Understanding the Needs & Challenges of Fishing Communities

The analysis of ports, literature review and surveys have helped to inform an initial view of the needs, challenges and opportunities that exist within the UK's fishing communities. These are now shared for discussion and debate to help inform the final research report.

Funding for Equipment

The provision of simple port infrastructure – including items such as davits and icing equipment - could make a significant contribution both to the quality of the fish landed, and the number of years older fishermen can continue to work in the industry. This is particularly the case in the smaller ports within the research sample.

Workforce

There are real challenges around recruitment and retention of people in the fishing industry. This is true irrespective of port size. In larger ports and for larger vessels the scale of the operations leads to the engagement of migrant workers, now deemed to be over 20% of all those working in the industry. In smaller ports, outside of fishing families, the supply chain of fishermen is very small and some of the settlements have a very limited long-term future in relation to the industry because of the challenge of workforce succession.

Health

A significant number of the ports demonstrated evidence of poor health amongst their fishermen and the wider community. Over 50% had the characteristic of health deprivation. The literature review and port visits further substantiated these findings; revealing amongst some fishermen evidence of a poor lifestyle in terms of diet and substance misuse.

Quota/Business Development

In smaller ports there are real challenges, manifested through limited access to quota for some fishermen. It was clear that limited earning potential had a significant knock-on effect on their wider personal circumstances.¹⁰

Adding Value/Business Development

For the under 10 metre fleet at many ports across the UK there is considerable potential for adding value to their catch and generating a larger income from it, rather than selling it through their current outlets.

Education

The review of port profiles revealed significant levels of deprivation in terms of educational achievement. There is a relatively low educational achievement requirement for entry to fishing with many skills “learnt on the job”. It is not just amongst individual fishermen however, but more widely in fishing communities, that investment in education and training could provide a significant increase in the quality of life of the individuals concerned.

Income

Almost 50% of all ports within the research sample were characterised by low incomes. The seasonal and uncertain nature of income generated by fishing whether for ‘share fishermen’ in bigger crews, or smaller under 10 metre operators, means that many fishing families face financial difficulties. These challenges impact on broader aspects of fishermen’s lives; such as the ability to obtain and sustain a mortgage.

Access to Capital and Business Development

It is apparent from visiting ports and interviews that the small scale and under-capitalised nature of many fishermen in the under 10 metre sector means that people are operating with old, and often worn, equipment, which compromises safety and quality in terms of their work. It is also clear that the uncertain nature of the income of many fishermen is a real impediment preventing access to investment funds for the development of their businesses.

Housing

A significant minority, 32% of all ports, were challenged by deprivation in respect of housing. The survey identified that most of the challenges in this regard were based around fishermen and their families being housed principally in the private rented sector, with uncertain incomes and limited provision to support them through difficult periods, such as at times of ill health.

¹⁰ <https://www.gov.uk/government/publications/fisheries-quota-allocation-2016>

Potential Opportunities to Tackle Needs and Challenges

Seafarers UK is a maritime grant-maker. This research was commissioned to inform our future grant-making strategy for the UK fishing community. It is apparent that there are potential solutions that may help to tackle many of the needs and challenges presented.

Some initial ideas are suggested below, but it is likely that others are also possible. Seafarers UK believes it is vital to consider any ideas that will support a sustainable UK fishing sector into the future, but obviously we will focus on areas which provide the greatest 'impact return' on any grant made.

This interim research is shared with other funders interested in funding the sector. However, it is relevant that the extent of need means there is significant potential for collaborative and partnership working to make a real and profound impact on this often 'invisible' community which suffers real and significant deprivation. Through working in partnership on potential solutions it may be possible to help UK fishermen achieve a competitive and sustainable business proposition for many generations to come.

Below are the opportunities, identified through the research.

Credit Unions

The uncertain nature of crew engagement within fishing, and a significant pattern of unsustainable borrowing by fishermen, is manifested across the whole of the sector, irrespective of geography or port size. Credit Unions can be a powerful and affordable means of ameliorating this challenge. There already exists some good practice in this context which can be built upon.

Money Advice

There is clear evidence, based around both a high incidence of income deprivation in fishing communities and the qualitative evidence collected, that many fishermen and their families would benefit significantly from additional support to manage their finances as effectively as possible.

Training

Port visits identified widespread opportunities to enhance the effectiveness of the operations of fishermen through training in key discretionary aspects of their skills base.

Pensions

Due to the particular nature of crew engagement some fishermen (particularly in the under 10 metre sector) have no private pension. In addition to this some fishermen have experienced problems with their state pension as a consequence of the low level of their national insurance contributions. There is scope to identify those in the greatest hardship and work with them to address the impact of this problem as effectively as possible.

Migrant Workers

Port visits and detailed discussions with key informants, supplemented by the very latest analysis from Seafish's 2017 pilot study of the UK Fishing Workforce, has revealed that as many as 20% of all fishermen, particularly in relation to larger vessels, are non-EU nationals. Further analysis is needed to understand the issues faced by these workers and the challenges of supporting them and the wider communities they are linked to.



Building Upgrades

There was significant evidence in a number of smaller ports where investment in port buildings could both provide better rest and social facilities for fishermen but also provide scope for them to add value to their catch.

Boat Building/Vocational Training

This is a niche but potentially high impact activity, which could provide jobs and business development opportunities in ports with a heritage tradition. In some cases, such as Cullercoats in North East England, these ports have lost any significant economic impact linked to the direct work of fishermen, but fishing remains an important historical and cultural legacy.

Small Harbour Infrastructure

There is considerable scope to both increase the number of years that fishermen can keep working, and the quality of their work, through the provision of small harbour infrastructure (eg. winches). For small ports and the under 10 metre fishing fleet, modest investments can make a really significant difference to the quality of life of the fishermen using them.

Health Outreach

There are opportunities to respond to the health challenges facing fishermen. There is evidence that suggest health interventions work best when health screening and facilities such as mobile dentistry are made available directly where people work. In addition to specific health interventions for fishermen, there is real scope to engage fishing communities more broadly through campaigns which provide and promote healthy living opportunities.

Basic Skills

The research found evidence of poor levels of literacy and numeracy in many fishing communities. Action to address these challenges could make a significant contribution to the self-confidence, engagement and wider personal development of fishermen and others in these communities.

Business Development

Many fishermen exhibit entrepreneurial behaviours in their day to day activities. A programme of work to help formalise and identify sources of investment for these skills could make a significant difference to the success and scale of their work.

Workforce

Workforce opportunities cover two areas – succession planning for those operating in the under 10 metre fleet, and the development of strategies to generate better terms and conditions and recruitment practices in relation to the over 10 metre fleet.

Animation

The nature of the industry, which can be very isolating, relatively low skill levels, and the fact that many individual fishermen have limited experience of working with public and voluntary bodies outside of the industry all lead to low levels of take-up for many schemes of support. Animation is the process of working intensively with people and organisations to enable them to achieve their full potential, eg. funding applications, business development plans etc. In the context of fishing communities, previous experience identifies a need to work pro-actively with fishermen to generate their engagement.



Conclusion

There are some very specific challenges relating to the occupation of fishing and the way it impacts on fishermen and their families which need greater attention. This research has shown the key themes to be addressed relate to: business support, port infrastructure, recruitment, access to capital and the ability to add value to the catch.

This research demonstrates that fishermen are resourceful and resilient. As a result of the unique nature of the industry, the independence it engenders, a dislike of 'officialdom' and a sense of being a little-understood community, fishermen often

miss out on the 'one size fits all' approach of many areas of social and economic support. This report identifies a number of ways support can be shaped to improve the quality of the lives of fishing families. Targeted funding, business development, outreach and animation to support fishermen access funding opportunities are key themes.

This research provides an agenda for future action.

The challenge now is for the fishing and maritime charities and those with an interest in the sector to more widely engage with it and support sustainable change within fishing communities for future generations of fishermen.



Seafarers UK aims to be a proactive and collaborative grant funder committed to making a real and sustainable difference to the UK fishing community.

Please contact Seafarers UK

- If you have feedback and input that will help to inform this research.
- If you would you like to hear more about this research and receive a copy of the final research report.
- If you would like to discuss any opportunities or initiatives that would benefit the UK fishing community.
- If you would like to work in partnership with Seafarers UK to support the UK fishing community.
- If you are a funder interested in partnering with Seafarers UK to co-fund or match fund specific projects within UK fishing communities.
- If you are an eligible organisation who needs funding for a project that would improve the lives or business of working fishermen of any age.

Please get in touch

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 SeafarersUK

Seafarers UK has been helping people in the maritime community since 1917, by providing vital support to seafarers in need and their families.

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