MEDIA CAPTURE IN UK FISHERIES

HOW CONCENTRATED POWER HAS INFLUENCED BREXIT COVERAGE

Written by Griffin Carpenter, Chris Williams and Emily Scurrah

September 2019

New Economics Foundation
www.neweconomics.org
info@neweconomics.org
+44 (0)20 7820 6300
@NEF

CONTENTS

SUMMARY

The UK fishing industry is a relatively small economic sector dispersed around the UK coastline. Rarely featured on the front pages, the Brexit referendum has shone a new spotlight on the fishing industry and exposed some of the challenges it faces to the wider public.

But who had their time in the spotlight? Fishing is not one singular business but rather multiple, distinct groups of vessels operating within the broader fishing industry. There are vessels – typically the larger ones – that have fishing quotas allowing them to catch specified quantities of key species. There is also a majority of the fishing fleet (79%) comprised of vessels that do not have their own fishing quota and must fish from a government quota pools, which hold 2% of the UK quota, or target non-quota species like shellfish. This divide in the fishing industry – amongst others – has significant implications for Brexit impacts and future fisheries policy. How trade risks and quota opportunities balance against one another depends significantly on what type of fishing vessel is being considered. This important nuance has been lost in the discussion. Instead, media coverage of Brexit and fisheries has almost exclusively focused on control of UK waters as a means of increasing UK holdings of quota to benefit fishers who can access this potential quota gain.

To explore this singular focus in the media coverage of Brexit and fisheries, we use the LexisNexis media search tool to record how often different fishers and fishing organisations have appeared in news articles on Brexit and fisheries since 2016. This text analysis reveals that of the 12,000 fishers and their representatives in the UK, the most cited individual – Bertie Armstrong – received 48% of the total coverage and the three most cited individuals received a combined 66%.

Bertie Armstrong, who popularised the 'sea of opportunity' pro-Brexit catchphrase, is Chief Executive of the Scottish Fishermen's Federation (SFF). The SFF tends to represent larger vessels in Scotland, which in turn tend to be those vessels with quota. Replicating the analysis by organisation, we find that the SFF received 49% of the total coverage and the top three organisations 85%, while organisations specifically representing the small-scale fleet received only 2% of the media coverage.

A high concentration of media coverage on a small number of voices is especially problematic if these voices are not representative. To explore whether there are uniform views on Brexit policy issues, we analyse the policy positions of different fishers and fishing organisations. On the issues of Brexit opportunities, tariffs on seafood, non-tariff barriers to trade, and quota distribution within the UK, we find evidence that fishers and

fishing organisations that receive much less media coverage tend to take a different (and often polar opposite) view to the SFF. With a heavy focus on only one perspective, the spotlight of media coverage has presented a picture that excludes the less homogenous views of many fishers. This is particularly the case for small-scale fishing vessels that make up 79% of the UK fishing fleet. These fishers mostly target shellfish as they do not hold quota and export a significant portion of their catch. For these fishers, any quota they can access would not offset the damage to seafood trade.

Exploring media coverage of these Brexit policy differences, we find that the dominant narrative of quota gains from Brexit has crowded out other Brexit impacts from media coverage. This includes the critical trade issues of tariff and non-tariff barriers, which will affect many of the smaller scale fishers, as well as the significant risk that overfishing could increase post-Brexit, as the UK intends to fish more, and EU members do not intend to fish less.

A lack of awareness in the media about the complexities of fisheries combined with the unequal power of groups within the industry has led to a small number of voices becoming dominant. In turn, this dominance has allowed these individuals to tell one particular narrative that benefits the parts of the industry and the types of vessels they represent. As the UK embarks on a new policy framework for fisheries management post-Brexit, this 'media capture' by individual actors risks creating an environment in which one set of interests is prejudiced over another.

Policymakers need to understand these complex differences regarding needs and interests, as these will play a role in the future shape of the fishing industry. Not only is current media coverage providing a simplified presentation of Brexit and fisheries, its presentation is being shaped by a small number of voices with particular interests. For UK fisheries to have a fair and sustainable future post-Brexit, media outlets should cast a wider net to hear from the great diversity of voices across UK fishing communities.

1. WHAT STORY IS BEING TOLD

The impact of Brexit on fisheries has been one of the hottest political stories in the UK since the EU referendum of 2016. UK fishers, as the story is told, are enthusiastic about claiming territorial waters and an increase in fishing quota that reflects this exclusive area.

For many fishers, however, the story is not so simple. NEF's detailed economic impact assessment of Brexit scenarios, *Not in the same boat*, revealed that the balance of risks and opportunities varies substantially across the UK fishing fleet.[1] For half the UK's fishing vessels, the economic losses under most Brexit scenarios outweigh the benefits. These are small-scale vessels (under 10 metres in length) targeting shellfish that would not receive any additional quota, but do export to the EU market and beyond through EU trade deals. This difference in Brexit impacts leads to different visions for post-Brexit fisheries policy, as we learned in our video project *Fishing after Brexit: Voices from the coast* which asked small-scale fishers in four fishing regions around the UK (Orkney and the Isle of Skye in Scotland, Milford Haven in Wales, and ports along the south coast of England) how Brexit may affect their business.[2] There is also a risk that Brexit will lead to overfishing if more quota is claimed by the UK without an equivalent decrease by the EU.

This is not merely a case of a simple message being favoured over a complex one. The narrative of Brexit quota gains is to the benefit of those segments of the UK fishing fleet that hold quota shares and have the capacity to fish further offshore for huge shoals of fish, but this does not apply to much of the UK fishing fleet. The dominance of this narrative reflects the power dynamics within the UK fishing industry.

There has been growing recognition of the uneven distribution of power and opportunity within the UK fishing industry. According to an investigation by Greenpeace UK, just five fishing families hold 29% of all UK fishing quota.[3] Fishing quota is a quantity limit on catches of different species and is the predominant means of accessing these fisheries. Our report, *Who gets to fish? The allocation of fishing opportunities in EU Member States,* described this quota allocation process in detail, noting that in the UK small-scale (under 10 metre) fishing vessels constitute 79% of the fleet[4] (and 48% by number of fishers[5]) but hold only 2% of the quota.[6] New representative organisations like the New Under Ten Fishermen's Association (NUTFA), the Coastal Producer's Organisation (CPO), the Scottish Creel Fishermen's Federation (SCFF), and the Communities Inshore Fisheries Alliance (CIFA) have all sprung up in the last decade specifically to represent this previously dispersed and unorganised group of small-scale fishers.

2. MEDIA ANALYSIS

Fishing quota is not the only important resource for fishers. Other business components like access to waters and access to markets are essential, as are sources of influence like access to decision-makers and access to the media – the latter is the focus of this briefing.

To investigate the concentration of media coverage for fishers, we conducted a text analysis of UK media using the LexisNexis database. For every newspaper included in the database, we used the search terms 'Brexit', 'fish*' (e.g. fish, fisheries, fishing), and the names of those in the catching sector of the fishing industry (either as a fisher or fisher representative) who have appeared in the media from 1 January 2016 to 20 April 2019. The full methodology for this media analysis is contained in the annex.

There are approximately 12,000 fishers in the UK and hundreds of individuals holding representative roles in fishing organisations, from local fishing associations and fishermen's co-operatives, to national and international lobbyists. However, as a percentage of all media interviews with the catching sector, Bertie Armstrong tops the list with 48% of all coverage. The top three individuals, which also include Aaron Brown (and alias Alan Hastings) and Barrie Deas captured 66% of the coverage between them. This extreme concentration of media coverage is illustrated in Figure 1.

The organisations that Bertie Armstrong, Aaron Brown, and Bertie Deas work for (the Scottish Fishermen's Federation, Fishing for Leave, and the National Federation of Fishermen's Organisations, respectively) are covered later in Figure 4 and the representativeness of these organisations of the broader catching sector in Section 4.

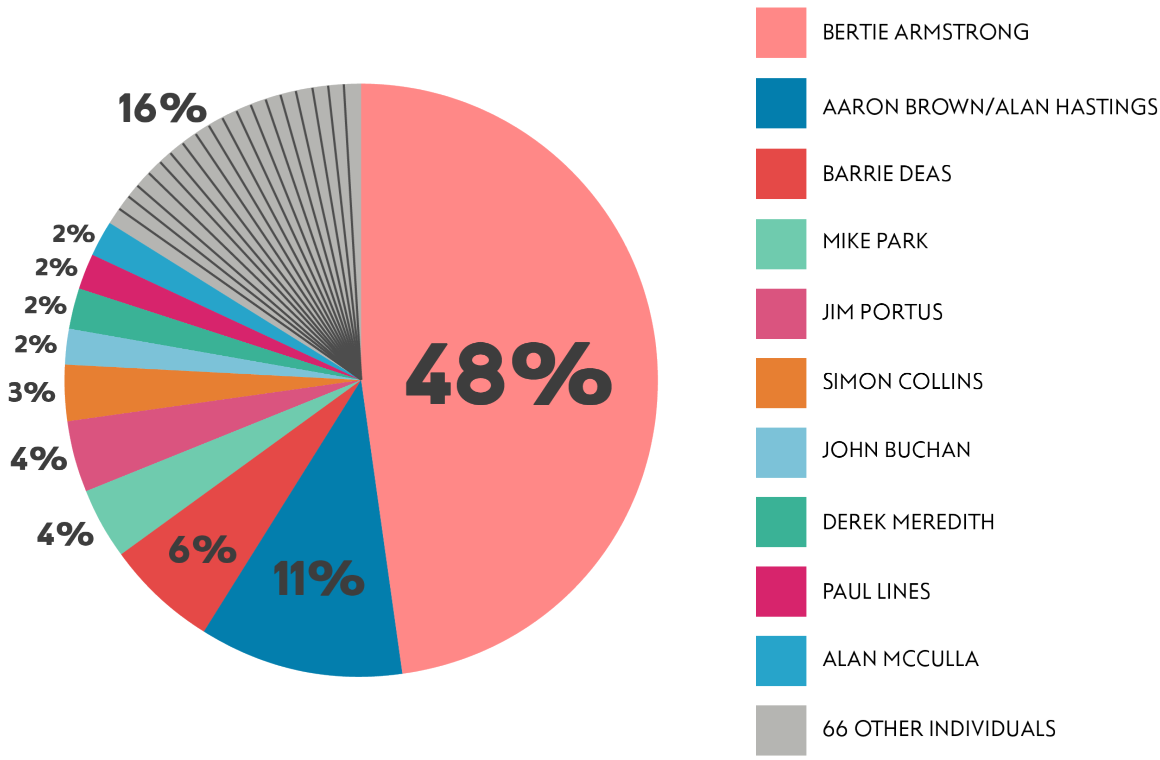

Figure 1: Share of media interviews by individuals in the catching sector
Source: Authors' calculations based on the LexisNexis database. Search covers 1,806 quotes or citations attributed to individuals between 1 January 2016 and 20 April 2019.

Even when interviews took place with other individuals, these interviews often focused on skippers or owners of fishing vessels. Fishing crew – who are increasingly foreign nationals – rarely feature in the press. A particularly stark example of this imbalance is the 3,000-word *Guardian* long read aboard the Crystal Seas interviewing skipper David Stevens about Brexit.[7] While the article notes an 'irony' that the crew of the vessel are Latvian, only one quote from their perspective – a comment on the weather – was included in the article.

The fish processing and wholesale sectors also tend to be excluded from media attention despite the fact that these sectors are larger than the catching sector in economic value (five times for processing) and employment terms (1.2 times for processing).[8] These integral parts of the fishing industry supply chain formed the Seafood Industry Alliance (SIA) after the Brexit vote to ensure that their unique perspective was heard.[9] These sectors prioritise access to the EU market and the recruitment of EU nationals as their top Brexit policy concerns.[10,11] However, with the exemption of the headline-grabbing call for Grimsby to be designated 'free port status' to ensure unhindered trade post-Brexit for its large fish processing industry,[12] these parts of the fishing industry failed to gain significant media interest.[i] Fish processors and wholesalers received only 15% of the media coverage compared to the catching sector's 85% (Figure 2).

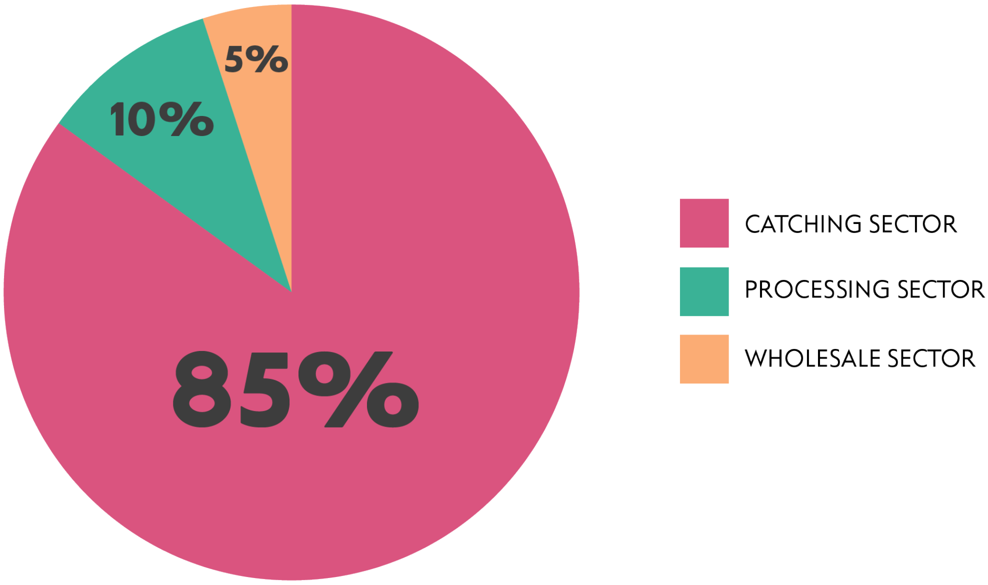

Figure 2: Share of media interviews by the sectors that comprise the fishing industry.
Source: Authors' calculations based on the LexisNexis database. Search covers 1,806 quotes or citations attributed to individuals between 1 January 2016 and 20 April 2019.

Expanding the analysis of concentration by individual to cover all voices working in the fishing industry (including seafood processing and wholesale) only slightly changes the results. As a percentage of all media interviews for the entire fishing industry, Bertie Armstrong tops the list with 41% and together with Aaron Brown/Alan Hastings and Barrie Deas received 56% of the coverage (Figure 3).

[i] There were similar demands for unhindered access from the aquaculture sector (e.g. salmon, mussel, and oyster farming), although aquaculture is generally not classified as part of the fishing industry and only considered in discussions about the seafood industry.

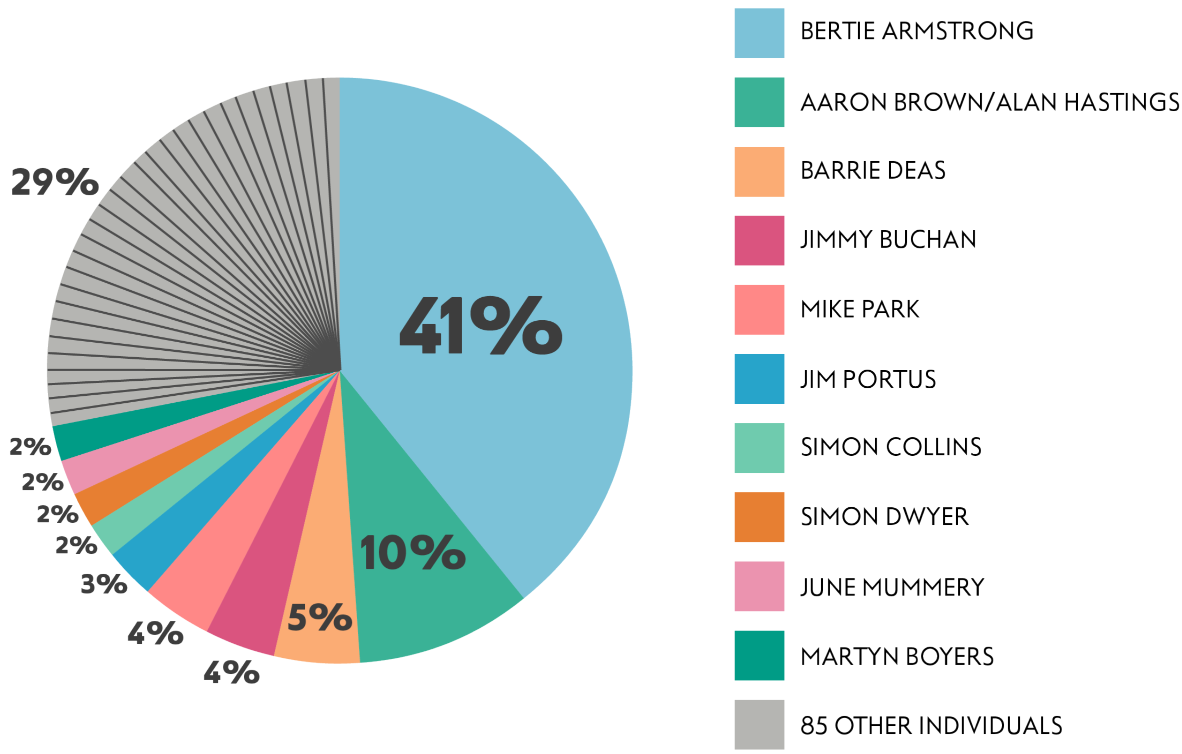

Figure 3: Share of media interviews by individuals in the fishing industry
Source: Authors' calculations based on the LexisNexis database. Search covers 1,806 quotes or citations attributed to individuals between 1 January 2016 and 20 April 2019.

Repeating the same media analysis for organisations rather than individuals also results in the same patterns. The individuals that appear most frequently in Figures 1 and 3 are the heads of the organisations that appear most frequently (Bertie Armstrong for the SFF, Aaron Brown/Alan Hastings for Fishing for Leave (FFL), and Barrie Deas for the National Federation of Fishermen's Organisations (NFFO). As there are fewer organisations than there are individuals, the results are even more concentrated with the SFF receiving 49% of the coverage and the SFF, the FFL, and the NFFO receiving a combined 85% share (Figure 4).

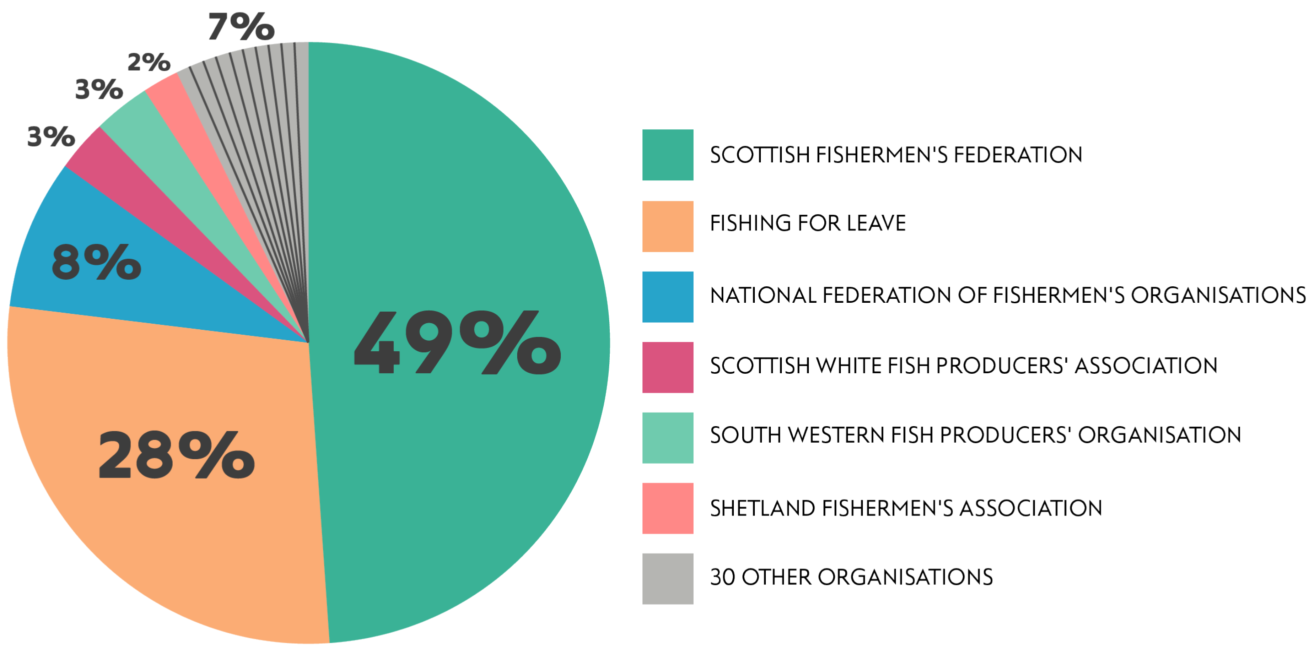

Figure 4: Share of media interviews by organisations in the catching sector
Source: Authors' calculations based on the LexisNexis database. Search covers 1,806 quotes or citations attributed to individuals between 1 January 2016 and 20 April 2019.

Membership statistics for the SFF, the NFFO, and many other fishing organisations are not publicly reported. However, the SFF[13] and the NFFO[14]comprise fish producer organisations, which now predominantly function as quota management bodies for their membership and as such have quota holders as members within the producer organisation, as well as some fishing associations. Small-scale fishing vessels, despite comprising 79% of the UK fishing fleet,[15] represent only 7% of producer organisation membership by number of vessels and only 1% by landed value.[16] Alternative organisations specifically representing the small-scale vessels – NUTFA, the SCFF, and the CPO – received a combined 2% of the media coverage. The FFL lobby group does not focus on a particular subgroup of UK fishers.

This stark picture of concentrated media coverage was also confirmed through an analysis of online media coverage using the monitoring tool, Signal. This analysis is caveated however, as while it included blogs and other webpages from the informal media sphere, it was limited to the 12 most recent months, risked false matches with common names, and could not reveal the total number (and thus percentages) of individuals in the analysis. Its findings are included in the annex.

Highly concentrated media coverage combined with a systematic problem of who these organisations speak for (to the extent that the dominant voice within these organisations speaks for the entire membership) presents a serious problem for public knowledge of the UK fishing industry. The views that are (and are not) being heard in media coverage of Brexit and UK fisheries are explored in the following two sections.

3. POWERFUL VOICES SETTING THE NARRATIVE

The SFF's vision for Brexit, which is shared by the NFFO,[17] is to support Brexit as a means of increasing fishing quota for their membership. This quota gain could potentially occur post-Brexit as the UK's exclusive economic zone of 200 nautical miles holds a greater share of fish stocks than is currently apportioned to the UK under the EU's Common Fisheries Policy.[18]

The concentration of media opportunities held by the SFF has proven effective in advancing this narrative. Even when the SFF is not directly quoted, their framing of Brexit as an opportunity for an increase in UK fishing quota is used. Members of Parliament including the Secretary of State for Environment, Food and Rural Affairs, Michael Gove, quote Bertie Armstrong regularly and even use the 'sea of opportunity' catchphrase. [19,20] The UK government's press release for the fisheries white paper on future fisheries legislation included quotations of praise from Bertie Armstrong and Barrie Deas.[21] This revealed that these two individuals were given advance access to government policy decisions and consultation, ahead of other fishing organisations, wider stakeholders, and even the Scottish Fisheries Secretary Fergus Ewing who issued a public complaint.[22] In media coverage, the dominance of the SFF narrative has meant that the complexity of fisheries and the demands of other parts of the industry – especially those that rely on market access rather than on access to quota – have been effectively side-lined.

4. CROWDING OUT OTHER VOICES, CROWDING OUT OTHER VIEWS

It is extremely common that industries have representative organisations and spokespeople who receive a far greater share of media coverage than the average person working in that industry. These organisations exist to speak on behalf of their membership, but it is also important to recognise the constituencies of these organisations despite their broad titles.

The SFF represents large-scale vessels with large quota holdings. This means that on the topic of Brexit, other fishers balance the risks and opportunities differently due to their own vessel characteristics and business models. As Elaine Whyte of the Clyde Fishermen's Association (CFA) explained:

> 'In terms of the dominant narrative that has been coming out, I would not blame the SFF for representing their members' interests. But we have different member interests. We represent the inshore men. So it's about making sure these other voices are coming through.'[23]

As Table 1 documents, there are several Brexit-related issues where some fishers – typically small-scale fishers targeting shellfish – have very different views from Bertie Armstrong and his representation of the SFF.

Table 1: Brexit issues and divergence of opinion between the SFF and other fishers

Topic	Scottish Fishermen's Federation	Alternative view
Brexit opportunities	'Brexit presents a Sea of Opportunity for the fishing industry, with the prospects of jobs and investment and a return to vibrancy for many of our coastal communities.' Bertie Armstrong, SFF[24]	'It's only a sea of opportunity for a few. It's not a sea of opportunity for the west coast inshore fleet.' Kenneth MacNab, Tarbert fisher[25] 'We haven't got the fishing opportunities to gain out of Brexit. We've got a hell of a lot more to lose.' Andrew Harrison, Campbeltown fisher.[26] 'The majority of fishing representation is by SFF who only have their own interest at heart, which is offshore pelagic/whitefish fisheries and the small-scale sustainable industry they have no interest in and give no voice to.' Duncan McAndrew, Plockton fisher[27] 'Every fisherman knows, if we're honest, that the CFP isn't to blame for all the changes and challenges we've experienced in the industry. The

		contraction of the sector, the concentration in fewer hands – these same trends are evident in commercial fleets outside the CFP, and have been driven more by technological changes, market forces and the state of fish stocks than by anything else. There's a similar story all over the world of bigger and fewer boats, with more mechanisation and greater efficiency, catching for a global market.' John Buchan, retired Peterhead fisher[28]
Tariffs on seafood	'Let us not be frightened to death of tariffs at all: they may be consumed in the noise of currency fluctuation and some small tariff may not be disaster.' Bertie Armstrong, SFF[29]	'Any tariffs would hurt our margins and profitability. It would also dismantle 20 years of perfecting the current system — overnight.' Alistair Sinclair, SCFF[30] 'Because we deal with the local inshore fisheries, if they put a tariff on that's going to directly impact the income of the boats.' Nerys Edwards, Siren Shellfish[31]
Non-tariff barriers for seafood	'We are less scared than other industries…The first solution is to temporarily fish less. You don't want to land it ashore for it to rot or not go anywhere. Secondly there are some smaller outfits running small boats in remote places which may indeed need some (financial) help to survive that period before new markets are opened.' Bertie Armstrong, SFF[32]	'If there's a line-up of lorries at the border because of Brexit, we'll be in trouble. The prawns need to make it to Europe alive. I wouldn't want to do anything but fishing, but will I be able to do this job if we can't sell our fish to Europe? I'm not sure.' Lewis MacMillan, Loch Fyne fisher[33] 'In Wales, 90% of the landed catch is shellfish, 90% of which is exported to European markets. Most of the shellfish is transported live in Vivier lorries. It is therefore critical to maintain the shortest possible supply chains based on frictionless borders – exporters of perishable goods would be particularly vulnerable to non-tariff barrier, e.g. customs check, certification inspections,

		delays.' Jim Evans, Welsh Fishermen's Association[34] 'I've heard it said that premium products like top quality Scottish langoustine will find its way to market because of demand. The problem is that it won't be prime quality if it's had to sit several days in a lorry at Calais, or in a customs warehouse, waiting to be cleared.' John Buchan, retired Peterhead fisher[35] 'We sell live, fresh produce to Europe and without being able to access streamlined freight transport systems we don't have a market. Somebody is misrepresenting the fishermen here and the prawn fishermen here on the west coast of Scotland are not being represented.' Alistair Phelps, Skye fisher[36]
Quota distribution within the UK	'How quotas are distributed will be looked at, but I don't think it's a huge issue at the moment.' Bertie Armstrong, SFF[37]	'It is disingenuous to purport that the management allocation of quotas is in any way fair or equitable in the UK.' Jerry Percy, Coastal Producers Organisation[38] 'We're stuffed for quota. Sometimes we can't go fishing for certain species because we've got no quota. This is all wrong. Our industry is shrinking because of the lack of fishing opportunities for the under 10s.' Chris Bean, Falmouth Bay fisher[39] 'Let's just hypothesise and say quota was doubled tomorrow. The guys who have 90% of the quota will have the same again and the guys who have 6% of the quota will have the same again. It still leaves that disparity.' Alistair Phelps, Skye fisher[40]

For the CFA, one of the founding members of the SFF over 40 years ago, divergent views with the SFF leadership proved too much. The CFA left the SFF on 19 March 2018. Tommy Finn, vice-chair of the CFA explained:

> 'The system [inside the federation] was against the west coast of Scotland and its communities. So we were heading toward leaving [the SFF] and Brexit gave us this final push.'[41]

Even amongst Brexit-supporting organisations, there is not full agreement. The FFL lobby group, which claims former members of SFF among its members, is a harsh critic of the SFF for supporting the UK government despite the Brexit transition deal which kept fisheries under EU management for a longer period:

> 'For two years, Fishing for Leave have bit our lip for the sake of the wider cause of the industry and way of life we are fighting for. However, after continued misrepresentations and protestations by the Scottish Fishermens [sic] Federation (SFF) and National Federation of Fishermens [sic] Organisations (NFFO) of their "speaking for all the industry" we feel we can stay silent no more. The tipping point is knowledge of discussions of agreements to stay mute on a transition deal, one that would prove disastrous for the majority of Britain's fishing, along with selling the industry a pup in exchange for maintaining the current system beneficial to a few.' [42]

With this context, it is clear that the SFF is not fully representative of the UK fishing industry and therefore the concentration of media coverage documented in Section 2 presents a distorted view.

As media coverage is inevitably limited in overall volume (there are only so many column inches and so much airtime), this framing has crowded out other issues in fisheries that do not fit the same narrative, such as the concerns of small-scale fishers targeting shellfish documented in Table 1: tariff fears, market disruption, and the distribution of quota *within* the UK.

5. OVERFISHING

For several decades overfishing has been one of the most — if not *the* most — discussed issue in UK fisheries. It is the driving force behind much of our fisheries legislation. However, in the context of Brexit, the risk of overfishing was rarely mentioned in the media (Figure 5).

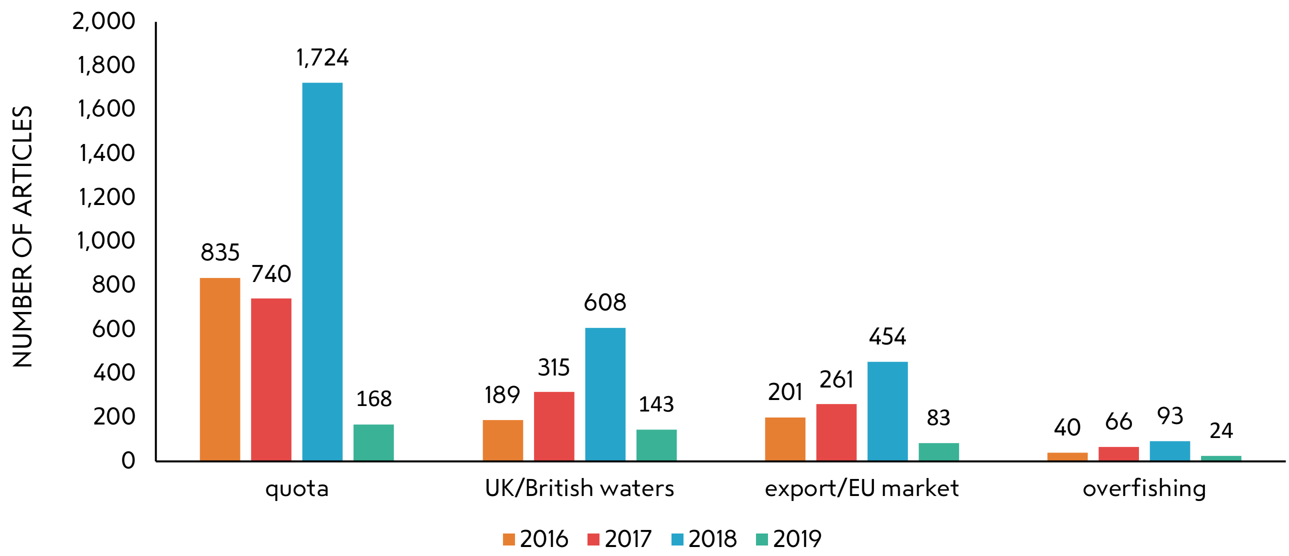

Figure 5: Number of articles mentioning Brexit, fish and terms in graph
Source: Authors' calculations based on the LexisNexis database. Search covers 1 January 2016 to 20 April 2019.

The relative silence in the media on the issue of overfishing is particularly problematic as the UK claiming a unilateral right to additional quota post-Brexit is likely to increase overfishing – as our Brexit economic impact analysis for the UK fishing industry revealed.[43] This is because just as the UK is promising quota gains for its fishers, the EU and individual member states are promising that there will be no quota losses for their fishers.[44] The only way to resolve this impasse is for the entire quota to be increased so the UK can increase its share at no loss to the EU, but at a significant risk to the sustainability of fish populations. This increase in the cumulative quota and systematic overfishing is exactly what takes place for the shared fish stocks between the EU, Norway, Iceland, and the Faroe Islands where the relative quota shares are debated and negotiations sometimes fail to reach an outcome.[45] Given the high level of concern in the UK media about overfishing before the Brexit referendum, and in particular during the reform of the Common Fisheries Policy in 2013 (Figure 6), it is worrying that the significant risk of systematic overfishing that Brexit presents has not received media interest.

Figure 6: The number of articles in the UK media mentioning fish and overfishing as a percentage of all articles mentioning fish.
Source: Authors' calculations based on the LexisNexis database. Search covers 1 January 2016 to 20 April 2019.

Another aspect of fisheries' sustainability is the allocation of fishing quota to low-impact fishers within the UK. As we have demonstrated in previous reports[46], a re-allocation of fishing opportunities based on environmental criteria could be transformational for the fishing industry as it would provide a clear and strong incentive to shift towards low-impact fishing methods as a means of receiving more fishing quota. When the SFF and the NFFO do address the allocation of fishing quota, it is only to downplay its importance (Section 4) and to focus the conversation on Brussels despite the fact that it is Westminster and the UK fisheries administrations who determine how fishing quotas allocated.

6. MEDIA CAPTURED

The concentration of Brexit media coverage on a small number of individuals has resulted in a skewed image of Brexit and the priorities that fishers have for post-Brexit fisheries policy. This is not an accidental outcome, but a deliberate framing by the dominant voices in the industry. Economists refer to situations where a group advancing the public interest is instead influenced by private actors pursuing their own self-interest as 'capture'. Recently 'media capture' has come under scrutiny for demonstrating this practice.[47]

Through our text analysis, we conclude that UK fisheries and Brexit are a case study in media capture in which the media as a group advancing the public interest is instead influenced by individual actors for their own gain. Whereas media capture is often used to refer to outright control of the media by corporations or the government, as with many forms of power, subtle expressions can prove just as influential. There are also clear instances of regulatory capture,[ii] although not the focus of this briefing, such as with the release of the fisheries white paper, described in Section 4, which sets the policy framework for future regulation.

For UK fisheries, a lack of awareness in the media about the complexity of fisheries combined with unequal power of organisations within the industry to garner media attention has led to one narrative becoming dominant. Representative politics depends on representative voices, but we are failing to provide this for UK fisheries through current media coverage.

7. WHEN SPEAKING WITH ONE VOICE FAILS

Out at sea and in dispersed communities around the UK coastline, fishers often feel that their voice fails to be heard in the corridors of power. This isolated position has led some in the industry to call for an end to division and to 'speak with one voice'. While this sounds sensible, the inevitable consequence of having only one voice is that diverse interests are smoothed over and the single perspective that emerges reflects the relative power of different interests.

The analysis detailed in this briefing reveals that one voice is in fact doing much of the speaking. Bertie Armstrong of the SFF has received 48% of the media coverage and the three most dominant voices received 66% of the total coverage. This level of concentration in media coverage is even higher than the much-criticised concentration in fishing quota where five families control 29% of the UK quota.[48]

[ii] Regulatory capture, a concept that is the forerunner to media capture, refers to a situation in which regulating bodies that are purported to advance the public interest are instead influenced by private actors – those being regulated – for their own gain.

Our analysis also reveals that the UK's diverse fishing fleets have different positions and priorities on Brexit and future fisheries policy, so the dominance of a few voices poses a serious problem of representativeness. One particular narrative about Brexit and fisheries has taken hold, a narrative that prioritises quota gains over other issues like tariffs, trade, and overfishing. It is a narrative that may benefit the members of the SFF but at the same harm much of the UK fishing fleet, along with the frequently overlooked fish processing and wholesale sectors.

As the prospect of UK leaving the EU without a deal nears, there is a lot at stake concerning who we hear from and who influences the course the UK takes in its future relationship with the EU. For UK fisheries to have a fair and sustainable future post-Brexit – a future that is viable for all fishing communities – the media must cast a wider net to hear from the great diversity of voices across UK fishing communities.

ANNEX: METHODOLOGY

PRESS ANALYSIS

For the press analysis, a period from 01/01/2016 to 20/04/2019 for UK media sources was set for the LexisNexis media database. Within these parameters, the search terms 'fish!' (e.g. fish, fisheries, fishing industry) AND 'Brexit' AND 'said' OR 'says' were used to compile a list of individuals and organisations in the catching sector and wider fishing industry. To validate this list of individuals, a Google News search for 'fish*' AND 'Brexit' was used and names of individuals who work in the fishing industry but were not captured in the LexisNexis search were recorded. In total, there were 1,806 quotes or citations attributed to individuals.

To determine concentration, each name AND 'Brexit' AND 'fish!' was then searched for in LexisNexis for the same 01/01/2016 to 20/04/2019 period. Combining the names from Google News means that some individuals had 0 hits if they were quoted in sources covered by Google News but not covered in the LexisNexis media database (e.g. *Financial Times*). These individuals and organisations were excluded from the figures produced for this briefing. It is unlikely that the concentration results are biased in either direction by the fact that the LexisNexis media database does not cover all media outlets.

ONLINE MEDIA ANALYSIS

For the additional media analysis of online sources, the online media monitoring application Signal was used. This enabled searching for coverage of particular people and organisations over the past 12 months in press and informal online sources.

Following on from the press analysis, the top names and organisations were used for this analysis. For individual names which were more commonplace, and therefore generated thousands of results, relevance was determined by filtering the results by source location and topic, respectively, with 30% of the articles read through thoroughly in order to make a judgement on the proportion of these results which were relevant to the topic of Brexit and fisheries. Due to this, results are imprecise for where there are more than 50 hits but are unlikely to significantly change the measures of concentration.

Due to the fact that the Google News method of identifying individuals and organisations could not be applied to reach all online sources and that there are more significant issues with common names and false hits, only the top individuals and organisations from the press analysis were used together with the individuals and organisations representing the small-scale sector to explore if online media shifted the concentration of coverage from the press analysis.

Again, the divide between the most powerful voices and the voices for the small-scale fleet is clear. By organisation name, the SFF and the NFFO recorded 2,978 hits to the 130 hits of the SCFF, NUFTA, and the Coastal PO (Figure A).

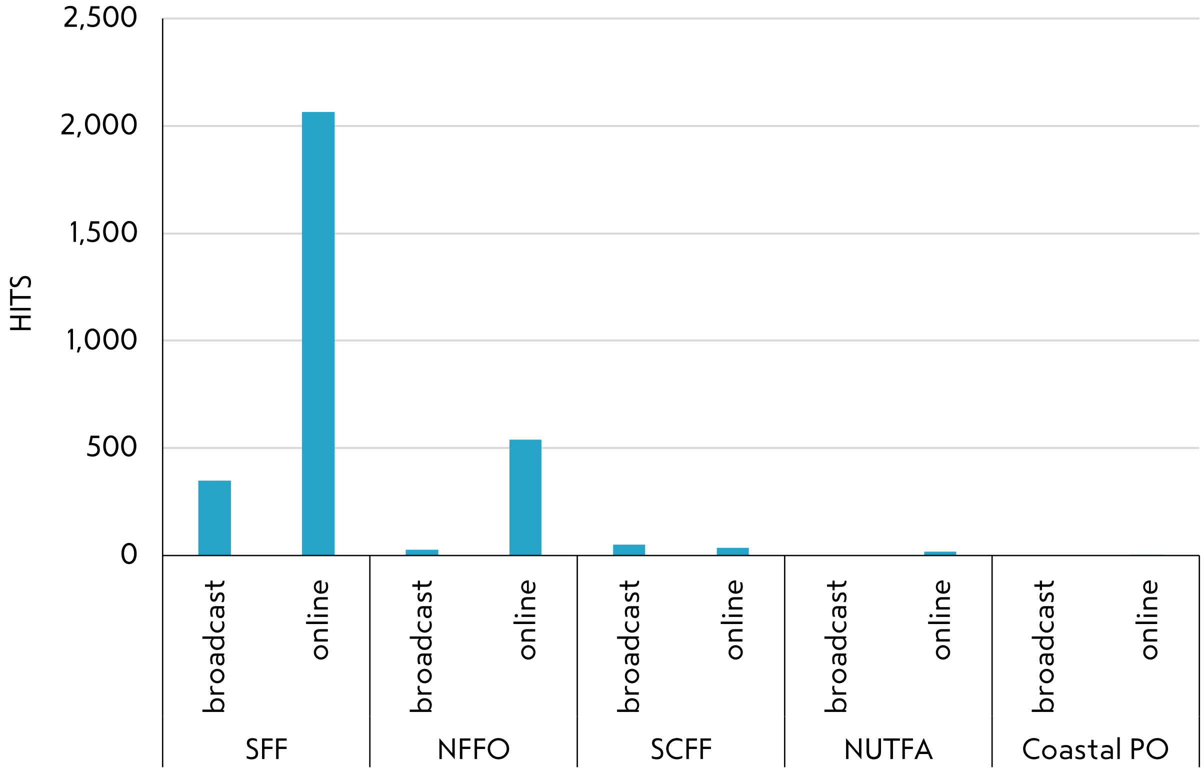

Figure A: Share of broadcast and online coverage by the most covered fishing organisations and small-scale fishing organisations in the catching sector
Source: Authors' calculations based on Signal media search. Search covers 21 April 2018 to 20 April 2019.

These results are also mirrored by individuals who represent these organisations (Figure B). Bertie Armstrong (SFF) and Barrie Deas (NFFO) recorded 2,205 hits to the 53 hits of Jerry Percy (Coastal PO, NUFTA), Jim Pettipher (Coastal PO), and Dave Cuthbert (NUFTA).

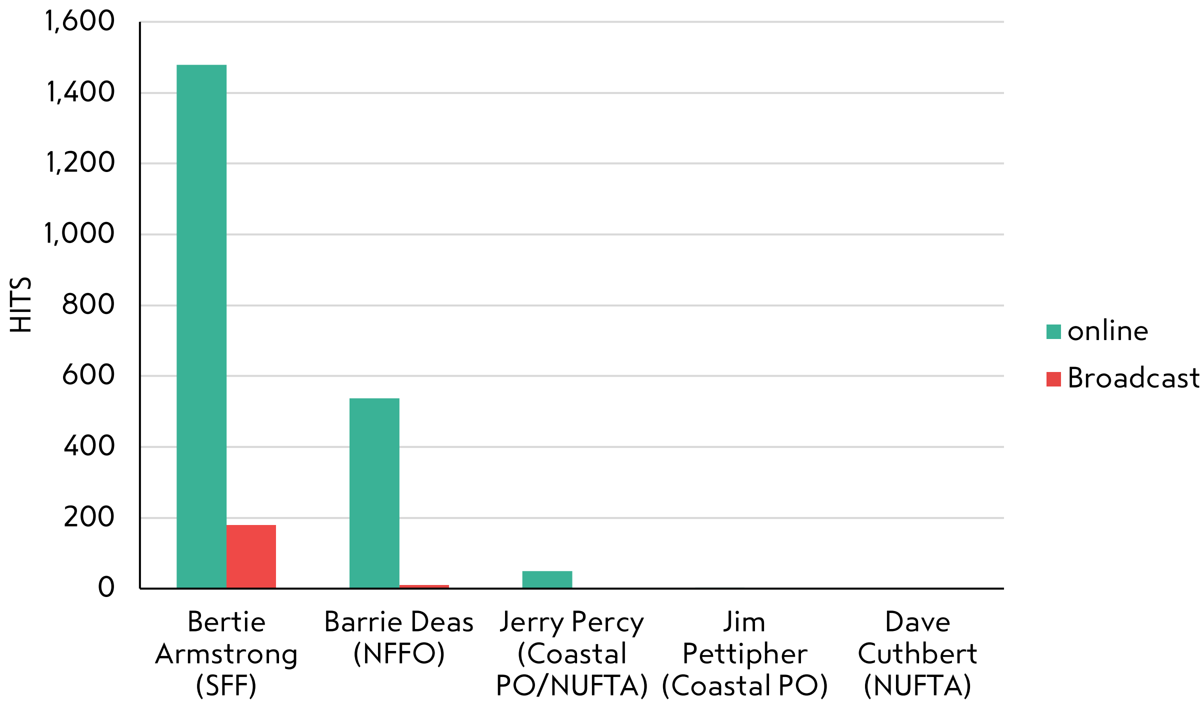

Figure B: Share of broadcast and online coverage by the most covered individuals and individuals representing the small-scale fishing organisations in the catching sector
Source: Authors' calculations based on Signal media search. Search covers 21 April 2018 to 20 April 2019.

Unlike the press analysis, measures of concentration across the fishing industry or the catching sector could not be constructed; the total number of blog mentions for all fishers could not be reliably assessed.

ENDNOTES

[1] Carpenter, G. (2017). *Not in the same boat: The impact of Brexit across UK fishing fleets*. London: New Economics Foundation. Retrieved from https://neweconomics.org/2017/11/not-in-the-same-boat
[2] New Economics Foundation. (2018). Fishing after Brexit: Voices from the coast [Video file]. London: New Economics Foundation. Retrieved from https://neweconomics.org/2018/10/fishing-after-brexit-voices-from-the-coast
[3] *Financial Times.* (2018). Fishing quotas concentrated in five families, says Greenpeace. *Financial Times*. Retrieved from https://www.ft.com/content/ab03945a-cc92-11e8-9fe5-24ad351828ab
[4] Marine Management Organisation. (2018). *UK sea fisheries annual statistics report.* London: Marine Management Organisation. Retrieved from https://www.gov.uk/government/statistics/uk-sea-fisheries-annual-statistics-report-2017
[5] NEF calculations from Scientific, Technical and Economic Committee for Fisheries (2018). *The 2018 Annual Economic Report on the EU Fishing Fleet (STECF-18-07)*. Luxembourg: Publications Office of the European Union. Retrieved from https://stecf.jrc.ec.europa.eu/reports/economic
[6] Carpenter, G. & Kleinjans, R. (2017). *Who gets to fish? The allocation of fishing opportunities in EU Member States.* London: New Economics Foundation. Retrieved from https://neweconomics.org/2017/03/who-gets-to-fish
[7] Wollaston, S. (2018). 'We want a better deal': talking Brexit aboard a fishing trawler. *The Guardian*. Retrieved from https://www.theguardian.com/environment/2018/nov/24/want-better-deal-talking-brexit-fishing-trawler
[8] Seafood Industry Alliance. (2016). Written evidence to the House of Lord Brexit inquiry. Seafood Industry Alliance. Retrieved from http://data.parliament.uk/writtenevidence/committeeevidence.svc/evidencedocument/eu-energy-and-environment-subcommittee/brexit-fisheries/written/38505.html
[9] Food and Drink Federation. (2016). New UK Seafood Industry Alliance. Food and Drink Federation. Retrieved from https://www.fdf.org.uk/news.aspx?article=7646
[10] Carpenter, G. (2017). *Not in the same boat: The impact of Brexit across UK fishing fleets*. London: New Economics Foundation. Retrieved from https://neweconomics.org/2017/11/not-in-the-same-boat
[11] Stewart, B.D. & O'Leary, B.C. (2017). *Post-Brexit policy in the UK: A new dawn? Fisheries, seafood and the marine environment.* York: University of York. Retrieved from http://www.brexitenvironment.co.uk/expert-reviews/
[12] Daly, P. (2018). Free ports could be coming to Grimsby – here is what to expect. *Grimsby Telegraph.* Retrieved from https://www.grimsbytelegraph.co.uk/news/grimsby-news/free-ports-could-coming-grimsby-1644059
[13] Scottish Fishermen's Federation. (n.d.). Our members. Retrieved fromhttps://www.sff.co.uk/our-members/
[14] National Federation of Fishermen's Organisations. (n.d.) Our members. Retrieved from https://nffo.org.uk/membership/our-members
[15] Marine Management Organisation. (2018). *UK sea fisheries annual statistics report.* London: Marine Management Organisation. Retrieved from https://www.gov.uk/government/statistics/uk-sea-fisheries-annual-statistics-report-2017
[16] Carpenter, G. & Kleinjans, R. (2017). *Who gets to fish? The allocation of fishing opportunities in EU Member States*. London: New Economics Foundation. Retrieved from https://neweconomics.org/2017/03/who-gets-to-fish
[17] Scottish Fishermen's Federation. (2018). *SFF and NFFO join forces to push for best Brexit deal.* Scottish Fishermen's Federation. Retrieved from https://www.sff.co.uk/sff-nffo-join-forces-push-best-brexit-deal/
[18] Carpenter, G. (2017). *Not in the same boat: The impact of Brexit across UK fishing fleets.* London: New Economics Foundation. Retrieved from https://neweconomics.org/2017/11/not-in-the-same-boat
[19] Duguid, D. (2018). *UK Fishing Industry debate: Westminster Hall.* Hansard. Retrieved from https://www.theyworkforyou.com/whall/?id=2018-12-12a.93.0#g99.3
[20] Gove, M. (2017). Tweet from 23 June 2017. Retrieved from https://twitter.com/michaelgove/status/878177334884417536

[21] The Department for Environment, Food & Rural Affairs. (2018). *Government publishes plan for an independent fisheries policy*. Retrieved from: https://www.gov.uk/government/news/government-to-publish-plan-for-an-independent-fisheries-policy
[22] Ewing, F. (2018). *Response to draft fisheries white paper.* Fergus Ewing: MSP for Inverness and Nairn. Retrieved from http://www.fergusewing.com/response-to-draft-fisheries-white-paper/
[23] Fraser, D. (2018). Brexit and fish: Skippers, kippers and the creel thing. *BBC News*. Retrieved from https://www.bbc.co.uk/news/uk-scotland-scotland-business-46444334
[24] Armstrong, B. (2018). *Fishermen's leaders welcome personal commitment from PM.* Scottish Fishermen's Federation. Retrieved from https://www.sff.co.uk/fishermens-leaders-welcome-personal-commitment-pm/
[25] Ibid.
[26] *Financial Times* (2019). Scotland's small fishermen see little benefit from Brexit. *Financial Times.* Retrieved from https://www.ft.com/content/4ffe9624-2951-11e9-a5ab-ff8ef2b976c7
[27] New Economics Foundation. (2018). Fishing after Brexit: Voices from the coast [Video file]. London: New Economics Foundation. Retrieved from https://neweconomics.org/2018/10/fishing-after-brexit-voices-from-the-coast
[28] Findlay, K. (2017). Former skipper fearful about Brexit's impact on fishing. *The Press and Journal.* Retrieved from https://www.pressandjournal.co.uk/fp/business/north-of-scotland/1237840/former-skipper-fearful-about-brexits-impact-on-fishing
[29] Lichfield, J. (2018). Brexit is a red herring when it comes to the plight of UK fishermen. *The Guardian*. Retrieved from https://www.theguardian.com/commentisfree/2018/jun/11/brexit-uk-fishermen-fishing-industry-quotas-uk-government
[30] Bolongaro, K. (2018). Fishy Brexit dilemma: Want out of EU but need the market. *Politico.* Retrieved from https://www.politico.eu/article/brexit-scotland-fishing-industry-divide/
[31] New Economics Foundation. (2018). Fishing after Brexit: Voices from the coast [Video file]. London: New Economics Foundation. Retrieved from https://neweconomics.org/2018/10/fishing-after-brexit-voices-from-the-coast
[32] O'Leary, E. (2019). Less Scottish fish for EU diners without Brexit deal -fishermen. *Reuters*. Retrieved from https://uk.reuters.com/article/britain-eu-fishing/rpt-less-scottish-fish-for-eu-diners-without-brexit-deal-fishermen-idUKL5N1ZW2KK
[33] Bolongaro, K. (2018). Fishy Brexit dilemma: Want out of EU but need the market. *Politico*. Retrieved from https://www.politico.eu/article/brexit-scotland-fishing-industry-divide/
[34] Williamson, D. & Harries, R. (2018). Brexit and Welsh waters: A story of hope, fear and uncertainty. *WalesOnline*. Retrieved from https://www.walesonline.co.uk/news/wales-news/brexit-welsh-waters-story-hope-14595004
[35] Findlay, K. (2017). Former skipper fearful about Brexit's impact on fishing. *The Press and Journal.* Retrieved from https://www.pressandjournal.co.uk/fp/business/north-of-scotland/1237840/former-skipper-fearful-about-brexits-impact-on-fishing
[36] New Economics Foundation. (2018). Fishing after Brexit: Voices from the coast [Video file]. London: New Economics Foundation. Retrieved from https://neweconomics.org/2018/10/fishing-after-brexit-voices-from-the-coast
[37] Ramsden, N. (2018). UK gov't considering foreign quota ownership, investments as Brexit white paper nears. *Undercurrent News.* Retrieved from https://www.undercurrentnews.com/2018/06/08/uk-govt-considering-foreign-quota-ownership-investments-as-brexit-white-paper-nears/
[38] Lichfield, J. (2018). Brexit is a red herring when it comes to the plight of UK fishermen. *The Guardian*. Retrieved from https://www.theguardian.com/commentisfree/2018/jun/11/brexit-uk-fishermen-fishing-industry-quotas-uk-government
[39] Hall, A. (2018). *Here's why not everyone in fishing is excited about Brexit*. Open Democracy. Retrieved from https://www.opendemocracy.net/en/opendemocracyuk/here-s-why-not-everyone-in-fishing-is-excited-about-brexit/
[40] New Economics Foundation. (2018). Fishing after Brexit: Voices from the coast [Video file]. London: New Economics Foundation. Retrieved from https://neweconomics.org/2018/10/fishing-after-brexit-voices-from-the-coast
[41] Bolongaro, K. (2018). Fishy Brexit dilemma: Want out of EU but need the market. *Politico.* Retrieved from: https://www.politico.eu/article/brexit-scotland-fishing-industry-divide/
[42] Njordr, A.B. (2018). *If only so many knew the truth about the corporate racket in the SFF and NFFO.* Fishing for Leave. Retrieved from http://ffl.org.uk/1110-2/

[43] Carpenter, G. (2017). *Not in the same boat: The impact of Brexit across UK fishing fleets.* London: New Economics Foundation. Retrieved from https://neweconomics.org/2017/11/not-in-the-same-boat
[44] Ibid.
[45] Carpenter, G. (2018). Why Brexit could lead to overfishing – to the detriment of everyone. *The Ecologist*. Retrieved from https://theecologist.org/2018/mar/09/why-brexit-could-lead-overfishing-detriment-everyone
[46] Esteban, A. & Carpenter, G. (2015). *Managing EU fisheries in the public interest: Results from the Bio-Economic Model of European Fleets.* London: New Economics Foundation. Retrieved from: https://neweconomics.org/2015/03/managing-eu-fisheries-in-the-public-interest
[47] Stiglitz, J. (2017). Toward a taxonomy of media capture In A. Schriffin (Ed.), *In the service of power: Media capture and the threat to democracy.* Washington: The Center for International Media Assistance. Retrieved from https://www.cima.ned.org/wp-content/uploads/2017/08/CIMA_MediaCaptureBook_F1.pdf
[48] Dowler, C. (2018). *Revealed: the millionaires hoarding UK fishing rights*. Greenpeace Unearthed. Retrieved from https://unearthed.greenpeace.org/2018/10/11/fishing-quota-uk-defra-michael-gove/