

**COUNTRY SPORTS TOURISM
IN SCOTLAND
Final Report**

Country Sports Tourism Group



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Contents

Executive summary	i
A. Background and objectives	7
Background	7
Methods	8
Report structure	9
B. Desk research	11
Participation in country sports	12
Visits to Scotland	15
C. Survey of participants	17
Respondent profile	18
Holidays and short breaks	23
Trips taken to Scotland	28
Satisfaction and issues	38
D. Qualitative research	46
Respondent profiles	46
Current markets	47
Changing markets	48
Current marketing practices	49
Scotland's strengths	50
Scotland's weaknesses	51
Which sports to develop?	52
European perspective	54
Product development	55
Communications development	58
E. Conclusions and recommendations	60
F. Appendices	63

Executive summary

Background

In 2003 the Country Sports Tourism Group (CSTG) commissioned TNS to undertake a programme of research with the following objectives:

- To gather information on current country sports tourists – origin, demographics, information and bookings, trip characteristics, satisfaction with product.
- To investigate the perceptions and attitudes of intermediaries.
- To identify participation trends on UK and international levels.
- To identify leading destinations & examples of best practice.
- To assess Scotland's strengths & weaknesses as a destination for country sports tourism.

The focus of this study was on trips taken which involved at least one night away from home i.e. holidays or short breaks which involved participation in country sports. The following sections summarise the key findings and conclusions from this study.

Value of country sports

A number of studies have been undertaken in recent years with the objective of measuring the economic value of country sports in Scotland. Most recently, a major study undertaken by Glasgow Caledonian University in 2004 for the Scottish Executive estimated a total annual expenditure by freshwater anglers of around £113m. Another study undertaken during 1997 by Cobham Resource Consultants estimated the annual value of shooting and stalking in Scotland at around £80m (at 2004 values).

By taking the results of both of these studies it may be estimated that the total value of country sports in Scotland is around £200m per year. This estimate includes expenditure by participants from Scotland, other parts of the UK and overseas and both those who take part in country sports during a day trip from home and those who take part while on a short break or holiday.

The angling study estimated that some two-thirds (67%) of the value of game and coarse angling was attributable to visiting anglers who did not live in the area in which they were angling. Other studies have suggested that at least this proportion of shooting and stalking participants are visitors to Scotland.¹ As such it may be estimated that the value of country sports tourism in Scotland (i.e. expenditure by visitors who take holidays or short breaks in Scotland to take part in freshwater angling, shooting or stalking) is at least **£130 million** per year.

Profile of country sports visitors

Around half of survey respondents were aged 55 or over while less than a tenth were under 35. This older age profile was particularly apparent amongst salmon anglers. Reflecting this age profile, most participants had over 20 years of experience in country sports.

While a high proportion of survey respondents were in the AB social classes, it was commented by some estates that the spectrum of participants was wide and included people from many different backgrounds.

It was also commented by the estates and agents spoken to that, in general, country sports participants were increasingly discerning about the quality of service and value for money obtained. In addition, many visitors now expect a more complete package including non-sporting activities within a sporting trip. Some of the changes reflect increasing international competition in the market with emerging country sports destinations such as Iceland, Russia and Eastern Europe.

Destination choices

Amongst survey respondents, the greatest influence on choice of country sport destination was previous experience. Other key factors included the peace, quiet and solitude to be found, scenery and landscape and chances of sporting success.

Specific reasons for choosing Scotland over other destinations included its accessibility, scenery, previous experiences, invitations or advice from friends, solitude and wildlife.

¹ Economic Impact of Sporting Shooting in Scotland, Scottish Development Agency 1990; Tourist Shooting in Scotland, BASC 2001

Generally, few if any formal sources were used to plan country sports trips to Scotland with visitors relying more on previous experiences or the advice of friends. A small but significant proportion of visitors used sources of information such as agents or the Internet.

Visits to Scotland

Reflecting the importance of previous experiences in destination choices, most of the survey participants were regular, repeat visitors to Scotland. Traditionally, many visitors take regular periods at an estate (e.g. a week in a certain month) on an annual basis.

Amongst survey respondents the most frequently undertaken sports in trips to Scotland were salmon angling, pheasant shooting and red deer stalking.

Visitors who participated in pheasant shooting or coarse angling tended to spend the shortest amounts of time in Scotland. By comparison those who undertook game fishing or deer stalking often stayed longer and included activities other than sport within their visit to Scotland.

The majority of participants who were game shooting visited with a group of friends while game anglers and deer stalkers were more likely to be accompanied by their husband, wife or other members of their family. Coarse anglers were the group most likely to visit alone.

In general visitors made limited use of formal sources of information when choosing destinations or planning visits to Scotland. Methods of communication used by estates reflected their 'low volume, high yield' markets with some making personal phone calls or writing letters to previous customers, inviting them to visit again.

Although a large proportion of respondents stated that they regularly read publications such as *The Field*, *Trout and Salmon* or *Shooting Times*, far fewer were influenced to visit Scotland by these sources. Nevertheless, articles or advertising in country sports publications could play a role in developing Scotland's profile as a destination.

Hotels and estate lodges were the most commonly used types of accommodation with hotels particularly likely to be used by salmon anglers while deer stalkers or grouse shooting parties were more likely to stay in a lodge. By comparison, coarse anglers were more likely to stay overnight in a tent or caravan. Most visitors booked both their accommodation and sport directly with the hotel or estate.

Over a quarter of visitors to Scotland who took part in country sports also went shopping for gifts, took part in sightseeing and visiting historic sites, went hill walking or watched wildlife. The range of activities undertaken reinforces the economic significance of country sports to the rural economy and reflects the motivations of visitors (i.e. enjoying the natural heritage, solitude, Scottish traditions). Furthermore, almost a quarter of visitors who shot pheasant and/or grouse also played golf during their visit to Scotland.

Satisfaction and opportunities for development

While in Scotland survey respondents were most likely to be satisfied with the country's scenery, peace and quiet, solitude and staff service. It was also suggested by estates and agents that many visitors appreciated the Scottish 'experience' (i.e. unique sports, staying in a lodge, tradition of sports, romance).

Areas of lower satisfaction included the price to undertake sports, accommodation prices, the quality of local food and drink, opportunities to undertake non-sporting activities and, most notably, the lack of quarry species. The lack of salmon was seen as a particularly significant issue.

When asked about potential barriers to future visits to Scotland *recent visitors* were likely to be discouraged by the lack of quarry species (esp. salmon or grouse) and the cost of undertaking the sport. Changes that might encourage future visits amongst this group included the provision of more information about sporting opportunities, improved value for money sports and better quality food and drink.

Amongst respondents who had *not visited* Scotland ever or for many years, the greatest barriers to future visits were the cost of sport and lack of knowledge about sporting opportunities. Correspondingly, the changes most likely to encourage this group to take trips in future were improved information, greater value for money sports and accommodation, the provision of short break opportunities and the provision of packages.

When asked about opportunities for development of the Scottish country sports product the key suggestions made by consultees included: improved 'front line' customer service, provision of more guided services, diversification of the sports provided by estates, provision of improved more suitable overnight accommodation, the development of courses for novices, greater packaging of non-sporting activities such as shopping or golf and more flexible selling of sport and accommodation (e.g. different durations).

Suggestions for the improvement of communications included: more communication and networking between suppliers, agents, associations and the public sector (e.g. seminars and workshops) and more effort to raise the profile of Scotland as 'the best country sports destination in the world', supported by practical information on opportunities to take part (e.g. sports possible, accommodation, packages, pricing/ deals).

Strategies for the development of specific sports will vary. For example, opportunities exist for the development of both rainbow and brown trout angling where there is a plentiful availability of quarry species, prices are lower and a large international market of anglers exists. The development of these sports may largely require improved communications of the opportunities to potential visitors and some infrastructural improvements such as the development of guiding services.

For other sports, such as salmon angling or deer stalking, future development could require the identification of unsold capacity and finding ways to sell this through the more flexible pricing and booking techniques.

Conclusions and recommendations

In summary, the conclusions and recommendations of this study are as follows:

Value for money – as decreasing prices is unlikely to be a viable option for most suppliers, the quality of the product needs to be developed together with improved communication of the opportunities to take part in lower priced sports (e.g. walked up shooting, rainbow or brown trout angling).

Raising quality - ways to ensure high levels of quality include the training of front-line staff on estates, the development of guiding services for certain sports, the improvement of overnight accommodation and ensuring that a full variety of sporting and non-sporting activities are available to visitors. It is also important to emphasise the 'Scottishness' of the product to certain markets. Importantly, the element most central to satisfaction is the quality of the sport itself and chances of angling, shooting or stalking success. The survey results suggest that action must be taken to reverse the decline in the number of salmon that may be caught in Scotland. There may also be opportunities to further develop sports where chances of success are higher (e.g. rainbow or brown trout angling).

Diversification and development of sports - while certain sports are seen to already be selling to capacity, there are opportunities to increase participation in others. Possibilities include wild brown trout angling, rainbow trout angling, deer stalking and certain methods of shooting (e.g. walked up). In addition there may be opportunities to identify whether there is any capacity in sports such as salmon angling or grouse shooting and to investigate more flexible pricing and booking methods. For each of the sports which may be developed, individual product and communications strategies are required to ensure that the product is at the quality required and that the 'best prospect' markets are made aware of the opportunities that exist.

Developing new markets - the survey illustrated the ageing profile of country sports participants. Action needs to be taken to encourage new participants to take country sports trips to Scotland. Opportunities may exist through courses for young people, combining an introduction to country sports with other related activities such as wildlife watching. Given the loyalty of country sports participants to particular estates, the development of new markets can only help to ensure their longer term success.

Information provision - a barrier to visiting Scotland is the lack of knowledge of the sports that can be undertaken and misperceptions regarding their cost and availability. Any future marketing communications must be supported by practical information on the sports available, their cost, how they can be booked, etc. Communications must emphasise Scotland's unique strengths as a country sports destination (quality, professional, traditional, scenery, wilderness, unique, genuine) whilst recognising the differences in the attitudes and needs of each country sport segment. The general perception that participation in country sports in Scotland is expensive should be dispelled by demonstrating opportunities to take part in lower priced sports such as rainbow or brown trout angling.

Communications within the industry - this study has demonstrated the wealth of experience and knowledge within the country sports industry and the enthusiasm to work together to develop tourism. It is vital now that there is a prioritisation of future actions. For example there have been suggestions to organise seminars and events to further discuss the way forward and how agents, estates, fisheries, associations and other stakeholders can work together with other parts of the tourism industry and the public sector.

A. Background and objectives

Background

The Country Sports Tourism Group was established in 2003 and contains representatives of the following organisations:

- Association of Deer Management Groups
- Association of Salmon Fishery Boards
- British Association for Shooting and Conservation
- Game Conservancy Trust
- Highlands and Islands Enterprise
- Scottish Countryside Alliance
- Scottish Enterprise
- Scottish Gamekeepers Association
- Scottish Rural Property and Business Association
- VisitScotland.

The main objective of this group is to develop the full potential of the country sports tourism market.

To guide future marketing and product development activities, the group recognised that up-to-date and accurate information was required on the current status of the market and opportunities for the future. As such, in 2003, the group commissioned TNS to undertake a programme of research with the following objectives:

- To gather information on current country sports tourists – origin, demographics, information and bookings, trip characteristics, satisfaction with product.
- To investigate the perceptions and attitudes of intermediaries.

- To identify participation trends on UK and international levels.
- To identify leading destinations & examples of best practice.
- To assess Scotland's strengths & weaknesses as a destination for country sports tourism.

The focus of this study was on trips taken which involved at least one night away from home i.e. holidays or short breaks which involved participation in country sports.

Methods

To achieve the objectives the study required a mix of primary and secondary research methods.

Desk research

The first stage of the study involved a review of previously undertaken research relating to country sports tourism and the current supply of country sports in Scotland. The results of this review were presented to the CSTG in January 2004 and some of the key findings are included within this report.

Quantitative research

Following the desk research stage, a survey of country sports participants was undertaken. This survey involved the distribution of paper, self-completion questionnaires to both UK and non-UK residents. Questionnaires were distributed as follows:

- 1,000 to British Association for Shooting and Conservation (BASC) members.
- 800 to Association of Salmon Fishery Boards (ASFB) members.
- 500 to Scottish Countryside Alliance (SCA) members.
- 1,200 to Association of Deer Management Groups (ADMG) members (to be copied and re-distributed to their own membership).
- 500 directly to estates and agency customers.

An electronic version of the questionnaire was also produced, allowing country sports participants to provide information on-line. The link to this questionnaire was distributed by the members of the CSTG and by other organisations involved in country sports.

In total, some 677 participants completed either the paper or electronic questionnaire with fairly similar response rates obtained from each of the groups contacted. With this size of sample it has been possible to separately analyse the results provided by the participants of different sports and according to places of origin.

It is important to note that this survey focused on people who took part in country sports as part of an overnight visit to Scotland i.e. a holiday or short break which included at least one night away from home. In this report the term 'visitor' relates only to people who have stayed overnight away from home rather than day trippers who leave home and return on the same day. A copy of the questionnaire used is appended.

It is recognised that the country sports industry includes numerous niche sports. In addition to the interviews undertaken for the purposes of this study, the CSTG has consulted and communicated with representatives of each sport through the Scottish Countryside Information Exchange.

Qualitative research

To obtain information on the views of suppliers of country sports in Scotland and intermediaries, a series of in-depth consultations were undertaken with estates, fisheries and agents. Representatives of a number of different associations involved in country sports were also consulted in both the UK and overseas.

A total of 30 interviews were undertaken face-to-face or by telephone. A copy of the discussion guide used during these interviews is appended.

Report structure

The main results of this programme of research are presented in this report under the following headings:

- *Desk research* – the key findings relating to the volume and value of the market are summarised in this section. A more detailed report of the outcomes of this stage of the study were presented to CSTG in January 2004.

- *Survey of participants* – results of the quantitative survey of 677 country sports participants.
- *Qualitative research* – results of the in-depth consultations with 30 suppliers, agents, associations and other stakeholders in the country sports industry.
- *Conclusions and recommendations* – the main implications of the study findings and recommendations for future action by the industry.

B. Desk research

As mentioned previously, the first stage of this study involved a review of existing literature and sources of data related to country sports tourism. The results of this stage were presented to CSTG in January 2004 and some of the main findings are provided in this section under the following headings:

- *Participation in country sports* – number of people within European, British and US populations that participate in country sports.
- *Visits to Scotland* – estimated value of country sports to Scotland.

The review of literature confirmed the need to undertake more detailed primary research amongst country sports participants as much as the information sourced regarding visitor profiles, levels of satisfaction, trip characteristics, etc. was incomplete, inaccurate or out of date.

While the collation of information on the value of Scottish country sports was not a primary purpose of this study, this information provides a useful context to the main findings which are presented in Sections C and D.

Participation in country sports

A number of different studies undertaken in the UK and overseas have aimed to measure numbers of country sport participants. This information provides a useful indication of the potential size of country sports tourism markets.

Europe

In 2002 TRAFFIC produced a report entitled 'The Lion's Share of the Hunt'. This report included estimates of the sizes of the European tourist hunting markets. The table below provides their estimates of the number of hunters² living in European countries in 2002.

Table B-1 – Number of hunters resident in Europe
Source: TRAFFIC Europe, The Lion's Share of the Hunt

	Number of hunters	Percentage of population
Finland	300,000	6.0
Malta	14,000	4.0
Norway	170,000	3.9
Sweden	320,000	3.6
Denmark	177,000	3.5
Ireland	120,000	3.4
Portugal	300,000	3.0
France	1,650,000	2.9
Greece	293,000	2.8
Spain	1,000,000	2.6
Italy	925,000	1.6
Austria	110,000	1.4
Great Britain	625,000	1.1
Switzerland	30,000	0.7
Luxembourg	2,100	0.6
Germany	338,000	0.4
Belgium	29,000	0.3
Netherlands	33,500	0.2
Total Europe	6,436,700	2.0

These estimates indicate that there are nearly 6.5 million hunters in Europe, about 2% of the total population. The largest numbers of hunters live in France, Spain, Italy, Great Britain and Germany.

² The term hunting is used in a number of international studies and encompasses both shooting and stalking but not angling.

As a percentage of each countries' total population, residents of Finland (6%), Malta (4%), Norway (3.9%), Sweden (3.6%), Denmark (3.5%) and Ireland (3.4%) were most likely to take part in hunting.

The TRAFFIC report also suggests that around 20% of all European hunters travel abroad for hunting, at least occasionally. This results in a potential visitor market of nearly 1.2 million.

Great Britain

As mentioned previously, the TRAFFIC study indicated that 625,000 GB residents take part in hunting. Another study undertaken in 1997 provided the higher estimates of 719,000 GB residents participating in shooting and stalking and 3.3 million fishing (n.b. there may be a significant overlap between these groups).

The table below summarises levels of participation in country sports in Britain as a whole and in Scotland. This study estimated total participation in Britain in any of the activities listed at around 4 million, or 7% of the population. The vast majority of this is in fishing, especially coarse angling.

Table B-2 – Number of country sports participants in GB

Source: Countryside Sports – Their Economic, Social and Conservation Significance; CRC 1997

	Participants in GB	% of population	Participants in Scotland	% of population
Fishing	3,300,000	6	350,000	7
Coarse	1,640,000	3	10,000	<1
Sea	840,000	1	90,000	2
Game	820,000	1	250,000	5
Shooting and stalking	719,000	1	77,300	2
Game, wildfowl, rough shooting	704,500	1	73,800	1
Deer stalking	14,500	<1	3,500	<1

In Scotland the total number of participants in country sports is around 400,000 with the majority participating in game angling.

USA

In the USA recent surveys have indicated that nearly 38 million people take part in either angling or hunting. There is a significant overlap in participation in the various country sports with, for example, 71% of hunters also fishing and 27% of anglers hunting.

Table B-3 – Number of hunters and anglers resident in USA

Source: National Survey of Fishing, Hunting and Wildlife Related Recreation 2001, US Fish and Wildlife Service

	Number of participants	Percentage of population
Angling or Hunting	37.8m	13
Angling	34.1m	12
Freshwater	28.4m	10
Saltwater	9.1m	3
Hunting	13.0m	4
Big game (e.g. deer, elk)	10.9m	4
Small game (e.g. squirrels, rabbits)	5.4m	2
Migratory birds (e.g. waterfowl, dove)	3.0m	1

As the table illustrates, around an eighth of US residents take part in either angling or hunting with 12% angling and 4% hunting. No information has been sourced on the proportion of Americans travelling abroad to take part in country sports. However, numbers able and prepared to travel as far as the UK are likely to be somewhat lower than the volumes shown in the table.

Visits to Scotland

A number of studies have been undertaken in recent years with the objective of measuring the economic value of country sports in Scotland. Most recently, a major study undertaken by Glasgow Caledonian University in 2004 for the Scottish Executive provided the following estimates of expenditure by freshwater anglers³:

Table B-4 – Volume and value of game and coarse angling in Scotland

Source: Economic impact of Game and Coarse Angling, Scottish Executive 2004

	Total annual expenditure
Salmon & sea trout anglers	£74m
Brown trout anglers	£15m
Rainbow trout anglers	£19m
Coarse anglers	£5m
TOTAL	£113m

Another study undertaken during 1997 by Cobham Resource Consultants provided estimates of the annual value of shooting and stalking in Scotland:

Table B-5 – Volume and value of shooting and stalking in Scotland

Source: Countryside sports - their economic, social & conservation significance, CRC 1997

	Total annual expenditure*
Shooting	£68m
Stalking	£12m
TOTAL	£80m

*Prices converted to 2004 values

By taking the results of both of these studies it may be estimated that the total value of country sports in Scotland is around **£200 million** per year.

These estimates include expenditure by participants from Scotland, other parts of the UK and overseas and both those who take part in country sports during a day trip from home and those who take part while on a short break or holiday.

The angling study estimated that some two-thirds (67%) of the value of game and coarse angling was attributable to visiting anglers who did not live in the area in which they were

³ Annual expenditure estimates cover all expenditure undertaken during trips taken for the purposes of country sports including overnight accommodation and equipment.

angling. Other studies have suggested that at least this proportion of shooting and stalking participants are visitors to Scotland.⁴

As such it may be estimated that the value of country sports tourism in Scotland (i.e. expenditure by visitors who take holidays or short breaks in Scotland to take part in freshwater angling, shooting or stalking) is at least **£130 million** per year.

⁴ Economic Impact of Sporting Shooting in Scotland, Scottish Development Agency 1990; Tourist Shooting in Scotland, BASC 2001

C. Survey of participants

This section of the report outlines the findings of the quantitative survey of 677 country sports participants. Results are presented under the following headings:

- *Respondent profile* – place of residence, demographics, participation in country sports.
- *Holidays and short breaks* – details of holidays and short breaks taken to undertake country sports, motivations and destinations chosen.
- *Trips to Scotland* – details of overnight trips taken in Scotland to participate in country sports, areas visited, information sources used, accommodation used and activities undertaken.
- *Satisfaction and issues* – an analysis of levels of satisfaction with Scotland’s country sports offering, possible barriers to future visits and opportunities for improvement.

It is important to note that this survey focused on people who took part in country sports as part of an overnight visit to Scotland i.e. a holiday or short break which included at least one night away from home. In this report the term ‘visitor’ relates only to people who have stayed overnight away from home rather than day trippers who leave home and return on the same day.

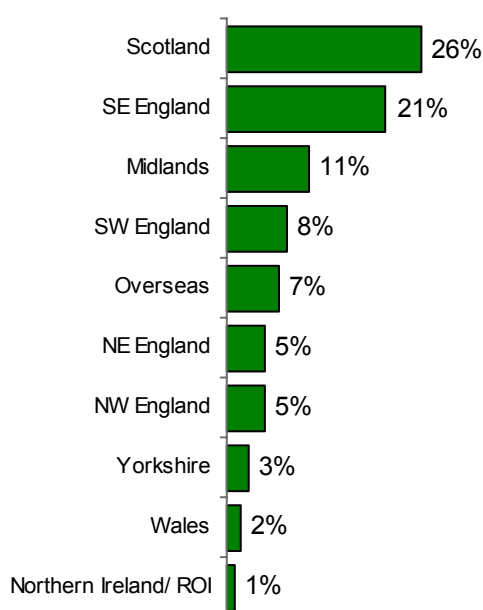
Respondent profile

Place of residence

As the table below illustrates, around a quarter of respondents lived in Scotland (26%) and a fifth lived in South East England (21%). Overall 7% of respondents lived overseas (47 respondents).

Figure C-1 –Place of residence (%)

Base: All respondents (677)



In comparison to the overall origin profile, a larger proportion of Scots were found amongst the respondents who took part in game fishing, deer stalking or grouse shooting. By comparison, respondents who took part in coarse fishing were more likely to live in England or Wales. Similarly, a larger proportion of the sea anglers included in the survey lived in the South East of England.

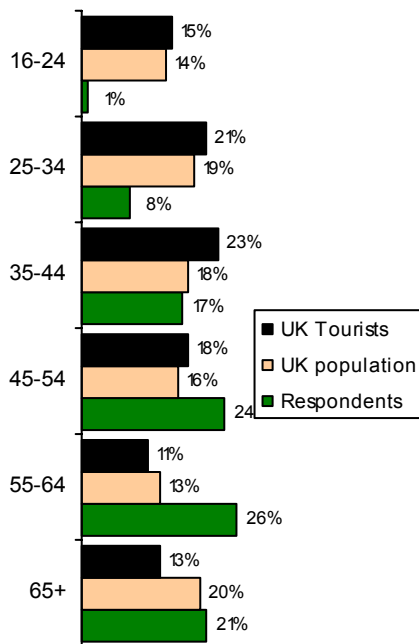
Demographics

To obtain details of the profile of country sports participants, respondents were asked to provide details regarding their sex, age, marital status, employment status and to indicate whether they had children in their household.

Most of the respondents were male (92%), 85% were married or living with their partner and 28% had children aged under 16 in their household.

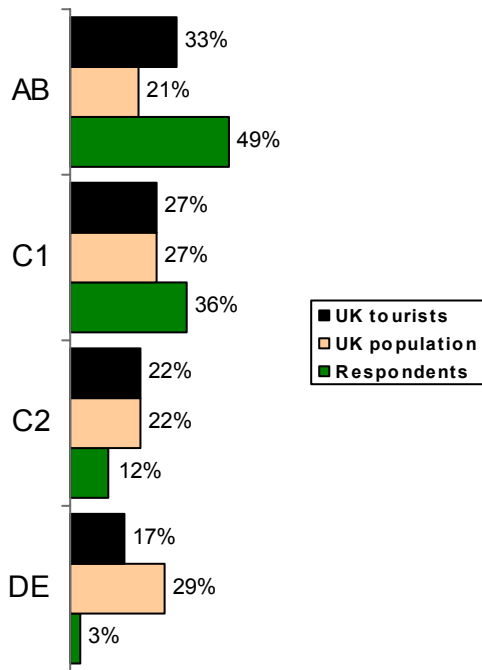
As the chart below illustrates, the age profile of respondents was fairly old with 24% aged between 45 and 54 and nearly half aged 55 or over (47%). For comparison, the chart also illustrates the age profile of the UK population and of UK tourists to Scotland (Source: VisitScotland). Just 1% of country sports participants were aged under 25, compared to 14% of the UK population.

Figure C-2 – Age (%)
Base: All respondents (677)



About half of respondents were in the AB social classes (49%), more than double the proportion amongst the UK population and higher than amongst UK visitors to Scotland (33%).

Figure C-3 – Social Grade (%)
Base: All respondents (677)



It is notable that respondents who participated in salmon fishing had the oldest age profile with 58% aged 55 or over while coarse anglers were more likely than other respondents to be aged under 35 (17%).

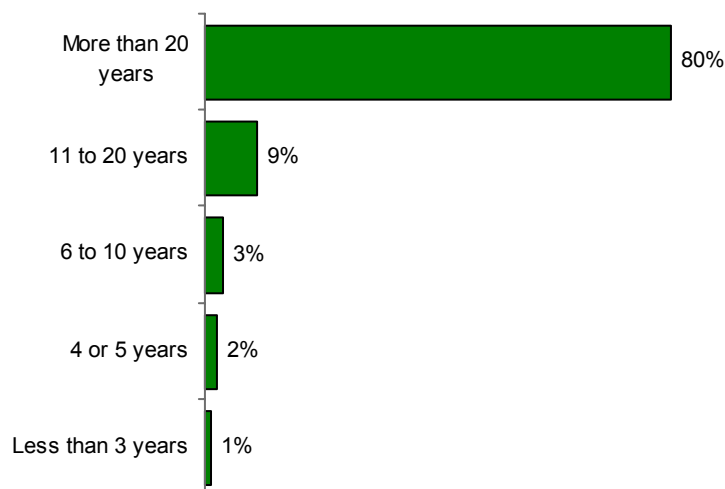
In terms of social class, the greatest proportions of ABs were found amongst respondents who took part in grouse shooting (32%) and deer stalking (30%). Conversely, around a quarter of coarse anglers were C2DEs (24%).

Country sports participation

Respondents were next asked about their general participation in country sports.

As the chart illustrates, most of the respondents had many years of experience undertaking country sports, indeed four-fifths had undertaken sports for more than 20 years (80%).

Figure C-4 – Years of participation in country sports (%)
Base: All respondents (677)

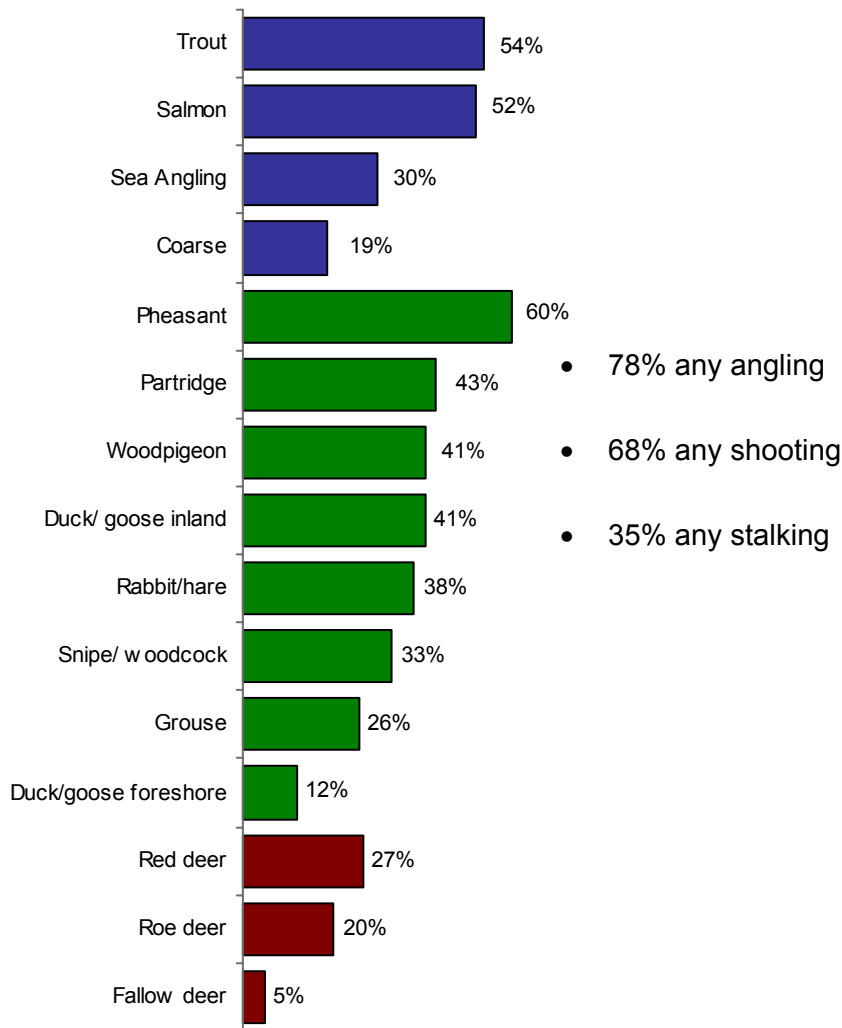


The respondents most likely to have the greatest number of years experience in country sports included those who took part in grouse shooting (91% had over 20 years experience) and salmon fishing (90% with over 20 years). This finding is likely to reflect the slightly older age profiles amongst participants in these activities.

In terms of the sports undertaken recently either on day trips or trips away from home, 78% of respondents had taken part in any angling since 2002, 68% had undertaken any shooting and 35% had been stalking (see chart overleaf).

It should be noted that this profile reflects the nature of the participants contacted for this survey and should not be taken as a wider measure of levels of participation in the UK.

Figure C-5 –Country sports undertaken since 2002 (%)
Base: All respondents (677)

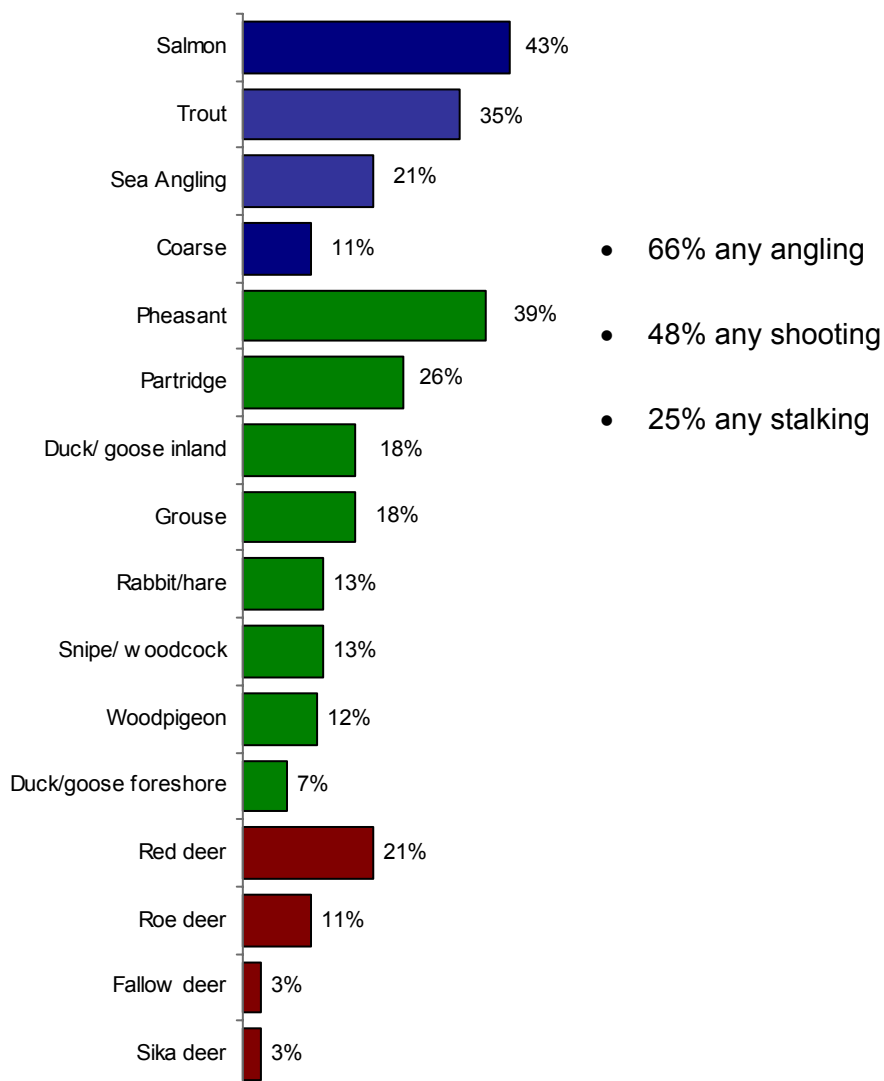


Holidays and short breaks

As the focus of this study is country sports tourism, it was important to gain an insight into the wider tourism market i.e. the destinations visited for country sports on trips which involved at least one night away from home. The following results related to overnight trips taken to any destination, the sport undertaken, places visited and factors that influence choices of destination.

Country sports undertaken

Figure C-6 –Country sports undertaken during holidays and short breaks since 2002 (%)
Base: Respondents who have undertaken any sports since 2002 (648)



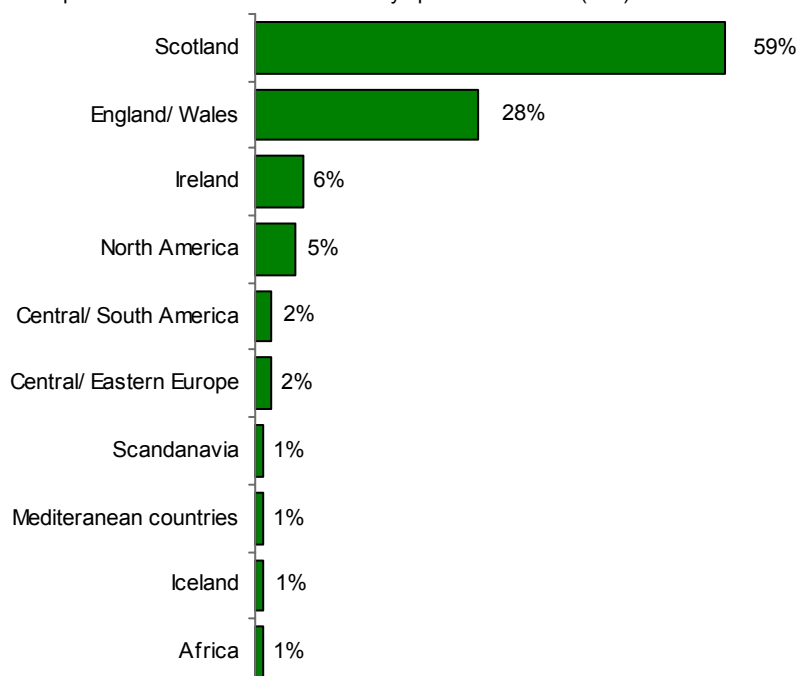
Overall, around two-thirds of respondents (66%) had gone angling during trips from home since 2002, 48% had undertaken any shooting and 25% had undertaken any stalking. The specific sports most frequently undertaken amongst the survey respondents were salmon fishing (43%), pheasant shooting (39%), trout fishing (35%) and red deer stalking (21%).

A more detailed analysis of the sports undertaken while on trips from home revealed that certain sports were usually only ever undertaken during holidays or short breaks from home - most notably salmon angling, deer stalking and sea angling. On the other hand, certain sports were more likely to normally be undertaken on shorter day trips from home including snipe, woodcock, wood pigeon, rabbit or hare shooting

Destinations and destination choice

When asked about where they had been to undertake country sports since 2002, the majority of respondents stated that they had been on overnight trips in Scotland (59%) while just under a third had undertaken sports during trips taken in England or Wales (28%).

Figure C-7 –Places visited since 2002 for country sports holidays and short breaks (%)
Base: Respondents who have undertaken any sports since 2002 (648)



It is interesting to compare the destinations visited for country sports by participants of different activities. Those who have undertaken game fishing, deer stalking or grouse

shooting were the most likely to have been to Scotland. Conversely, respondents who had taken part in coarse fishing, sea angling or pheasant shooting were less likely to have visited Scotland but more likely to have gone to England or Wales.

Influence on destination choice

While most respondents had 'a lot of influence' on the choices of destinations visited for country sports, a smaller proportion (10%) indicated that they had little or no influence on the decision (for example they were someone's guest).

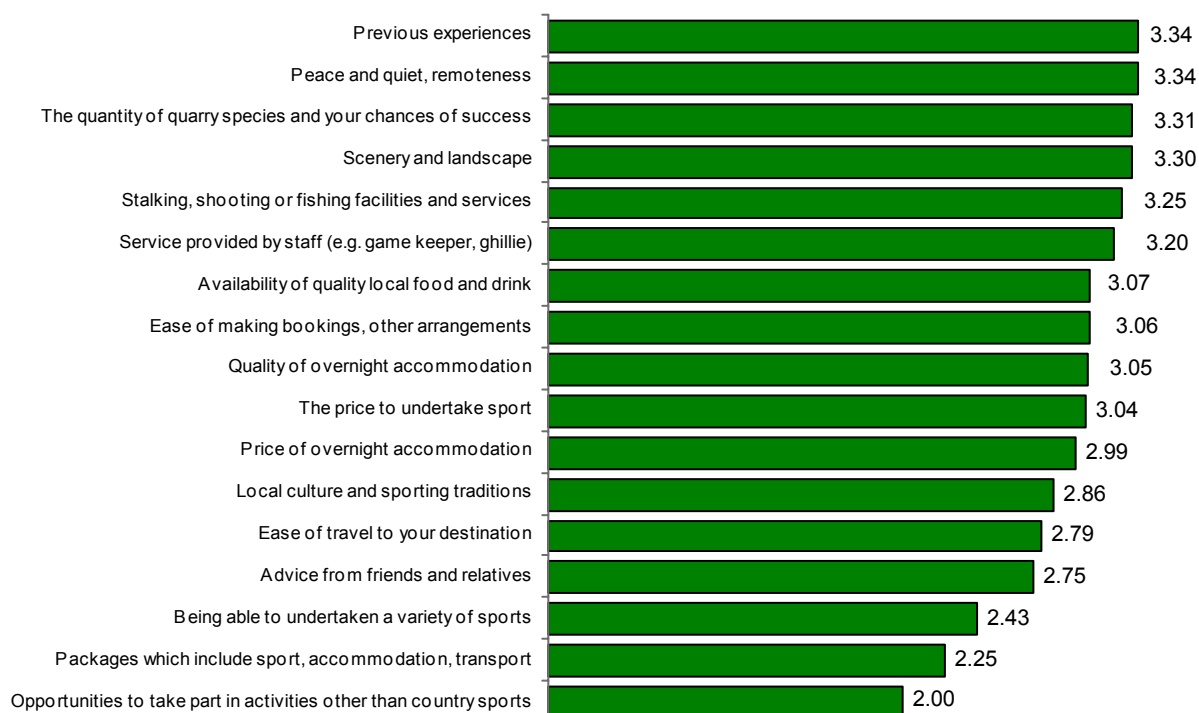
Visitors most likely to state that they had little or no influence over their choices of destination included those who had taken part in pheasant or grouse shooting (both 13%) while coarse anglers were more likely to have made the decision jointly with others (40%).

Factors affecting choices of destination

Respondents were shown a list of factors which might influence their choices of country sports destination and asked to indicate how important each was to them. Possible answers ranged from 'not at all important' (score of 1) to 'very important' (score of 4). The chart below illustrates the average scores obtained across all respondents ranked from the most important overall to least important.

Figure C-8 –Factors affecting choices of country sports destination (1=Not at all important; 4 = Very important)

Base: Respondents who have undertaken any sports since 2002 (648)



The most important factors overall in choices of country sports destination were (average scores in brackets): previous experiences (3.34), the peace, quiet and remoteness that could be found (3.34), the quantity of quarry species and chances of success (3.31) and scenery and landscape (3.30).

The least important factors overall were: being able to undertake a variety of sports (2.43), the availability of packages (2.25) and opportunities to take part in activities other than country sports (2.00).

It is useful to identify the varying levels of importance of each of the factors to different groups of country sports participants.

- *Salmon anglers* – factors more important to salmon anglers than to country sports participants generally included previous experiences, finding peace, quiet and remoteness and scenery and landscape.
- *Trout anglers* – factors more important to trout anglers than the average across all respondents included finding peace, quiet and remoteness and the scenery and landscape.
- *Coarse anglers* – factors more important to this group included the quantity of quarry species and chances of success.
- *Deer stalkers* – this group were more likely to rate the service provided by staff such as game keepers, country sports facilities and services and scenery and landscape as important in their choices of destination.

In addition to those which were rated, the following were also suggested as factors to be considered when choosing a destination:

- Invitations from friends/ being a guest.
- The politics and/or legislation in a destination.
- The friendliness of locals.
- The reputation of owners, stalkers, ghillies and/or keepers.
- The distance to and accessibility of a destination.

Future country sports destinations

Respondents were asked to indicate whether they were likely to visit any of a list of possible destinations to take part in country sports. As the table below illustrates, around three-quarters of all respondents were likely to take a holiday or short break to Scotland while just over half were likely to take a trip in England.

The key reasons for visiting Scotland included the scenery, previous experiences, friends to visit and wildlife while the 'top' reason for visiting England was the ease of accessibility. Those who wanted to visit Ireland mentioned the friendly people as one of the main motivations.

Figure C-9 –Destinations likely to visit in next 3 years

Base: Respondents who have undertaken any sports since 2002 (648)

	% Likely to visit in next 3 years or so	Groups more likely to visit. Participants of:	'Top' reasons
Scotland	73	Game angling, deer stalking, grouse shooting	Scenery, repeat visits, friends, accessible, friendly, peace & quiet, wildlife to see.
England	55	Coarse angling	Accessible, repeat visits, abundance of species.
Ireland	32	Trout, coarse and sea angling	Friendly people, scenery, repeat visits, quality of sport.
N. America	18	Game, coarse and sea angling	Scenery, quality of sport, friendly people.
Spain/ Portugal	13	Game bird shooting	
S. America	12	Salmon anglers, pheasant shooting, deer stalking	Scenery.
France	12	Coarse angling, pigeon/ partridge shooting	
Scandinavia	10	Game angling	Fishing, quality of sport.
Russia	10	Game angling, deer stalking	
Africa	7	Deer stalking, sea angling.	Scenery, experience of safari/ big game
Iceland	7	Game angling	Fishing.
New Zealand/ Australia	6	Game angling	
Central/ Eastern Europe	4	Deer stalking, game angling	Scenery

Specific destinations were more likely to be mentioned by participants of particular sports. Most notably, respondents who participated in game angling, deer stalking or grouse shooting were more likely to state that they were likely to visit Scotland in future while coarse anglers were more likely to be likely to visit England. Sea anglers were more likely to select Ireland or North America as potential destinations.

Trips taken to Scotland

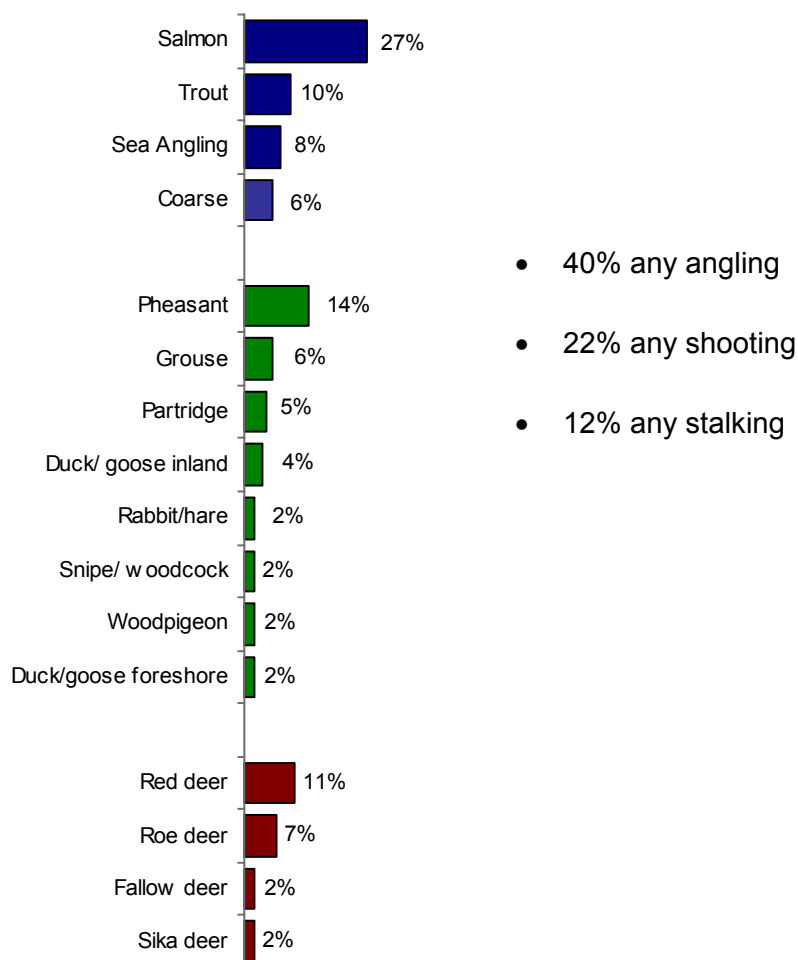
To find out more about country sports tourism in Scotland, respondents who had taken at least once holiday or short break in Scotland which involved participation in a country sports and at least one night away from home were asked a series of questions about their most recent trip.

The majority of respondents had taken a country sports holiday or short break in Scotland with nearly two-thirds taking their most recent trips during 2003 or 2004 (69%).

Country sports undertaken

When asked to specify the type of country sports undertaken during their most recent trip in Scotland, about a quarter of respondents stated that they had fished for salmon (27%), 14% shot pheasant and 11% stalked red deer.

Figure C-10 –Country sports undertaken during most recent holiday or short breaks in Scotland (%)
Base: Respondents who have undertaken country sports trips in Scotland since 2002 (487)



Trip duration

Just over half of respondents stated that their most recent country sports trip to Scotland had lasted 4 or more nights (58%) while the remainder had taken shorter breaks of 1 to 3 nights (42%).

The trips most likely to have lasted 4 or more nights included those undertaken for game fishing or deer stalking while the majority of coarse angling and pheasant shooting trips were of a shorter duration. In terms of places of origin, respondents who lived in Scotland were the most likely to indicate that their most recent trip had lasted less than 4 nights while international visitors were more likely to have spent longer in Scotland.

Trip purpose

In around two-thirds of trips country sports were the only trip purpose (63%) and this was more likely to have been the case during short breaks (73%). In most of the remaining trips (32%) country sports were the main but not the only purpose while on a very small proportion of occasions trips involved country sports but not as a main purpose (4%).

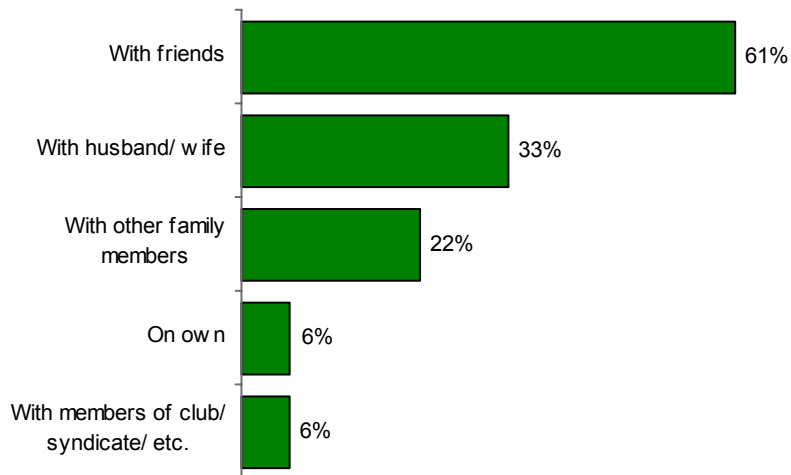
The country sport was most likely to be the only trip purpose when salmon or coarse angling was undertaken and in trips involving deer stalking or wood pigeon, pheasant, partridge or wild fowl shooting. Conversely, the country sport was more likely to be one of a number of reasons for the trip when trout angling, sea angling or grouse shooting was undertaken. For around half of international visitors the country sport was the only reason for the trip while a similar sized proportion stated that it was the main, but not the only, purpose.

Party composition

As the chart below illustrates, the majority of country sports trips to Scotland were taken with friends (61%).

Figure C-11 –Party composition (%)

Base: Respondents who have taken country sports trips in Scotland since 2002 (487)



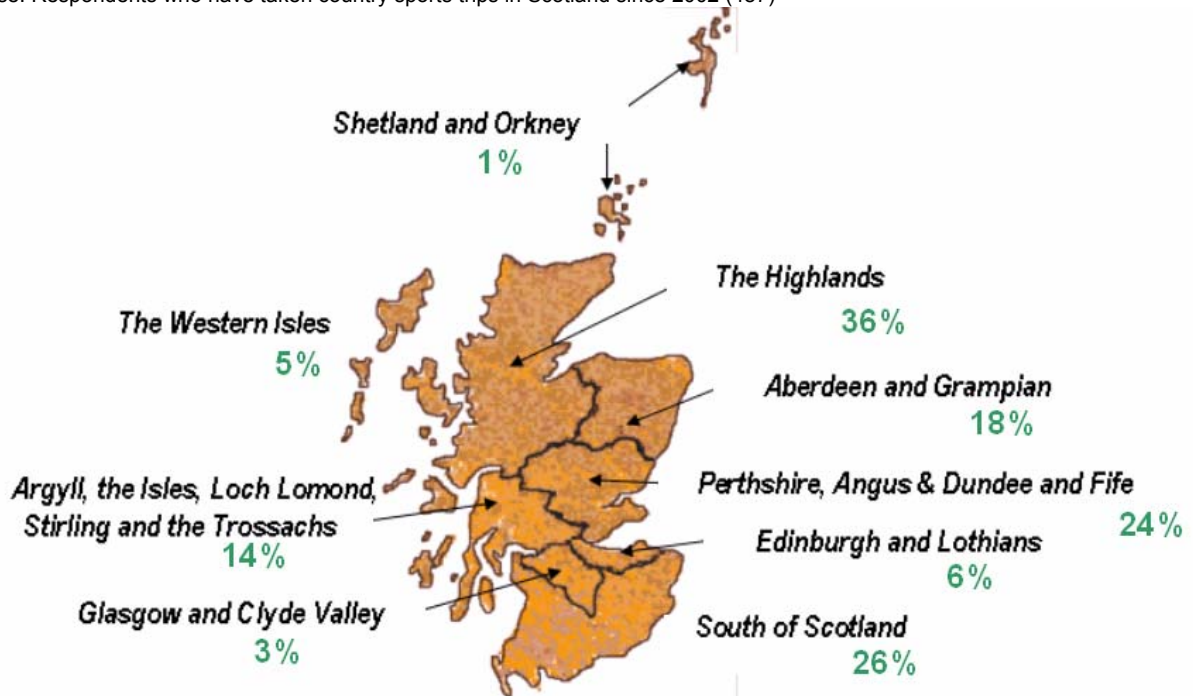
Party composition profiles varied by sport with the vast majority of those who took part in grouse, pheasant, wood pigeon or partridge shooting visiting with friends while those who took part in game angling or deer stalking were more likely to visit with their husband or wife. Coarse anglers were the group most likely to have visited Scotland on their own.

Destination of trip

As the chart below illustrates, country sports were most likely to have been undertaken in the Highlands (36%), the South of Scotland (26%) and the Perthshire, Angus, Dundee and Fife area (24%).

As might be expected, country sports were less likely to have been undertaken in the more urban areas with only 6% participating in Edinburgh and the Lothians and 3% participating in the Glasgow and Clyde Valley area.

Figure C-12 –Where country sports were undertaken during most recent trip in Scotland (%)
Base: Respondents who have taken country sports trips in Scotland since 2002 (487)

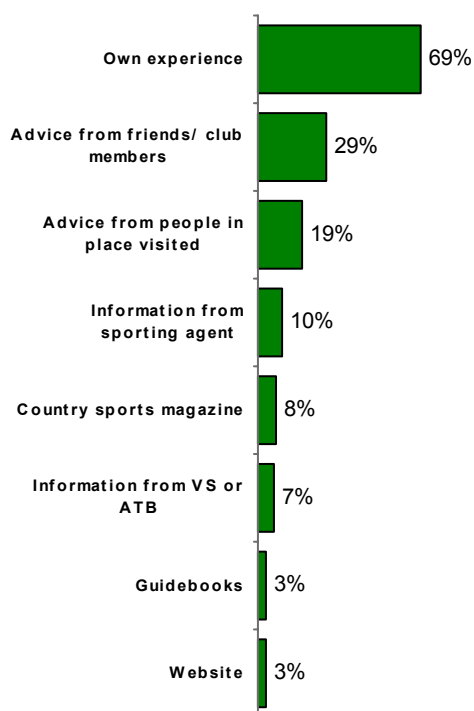


Information sources

When planning country sports trips in Scotland, the most important sources of information for the majority of respondents were their previous experiences (69%), the advice of friends or members of a country sports club or syndicate (29%) or the advice of people in the place they were visiting (e.g. the estate).

Formal sources of information were less regularly used overall with 10% obtaining information from a sporting agent, 8% obtaining information from a country sports magazine and 7% using sources from VisitScotland or an Area Tourist Board (7%).

Figure C-13 –Information sources used when planning most recent trip in Scotland (%)
Base: Respondents who have taken country sports trips in Scotland since 2002 (487)



It is useful to compare the levels of use of the various information sources amongst respondents who took part in different country sports:

- *Salmon angling* – participants of this activity were more likely to obtain information from a sporting agent (10%).
- *Trout angling* – these respondents were more likely to obtain information in the place they were visiting such as from the estate or fishing clubs (41%).

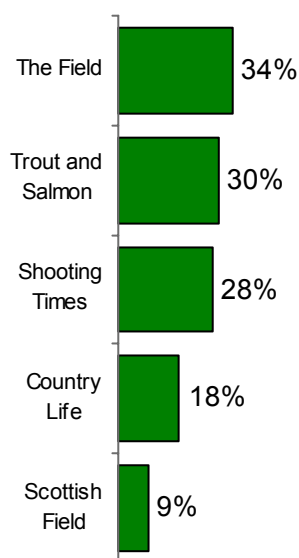
- *Coarse and sea angling* – compared to the other activities, a larger proportion of coarse and sea anglers stated that they obtained information from friends or club members (48%).
- *Deer stalking* – this group were the most likely to rely on previous experiences (85%).
- *Grouse shooting* – participants in this activity were more likely than average to obtain information from a sporting agent (15%).

The types of information used also varied according to the origin of visitors with international respondents more likely to have used a sporting agent or to have obtained advice from friends or other club members.

Respondents were also asked to indicate whether they read any country sports related publications on a regular basis.

Figure C-14 –Publications read on a regular basis (%)

Base: All respondents (677)



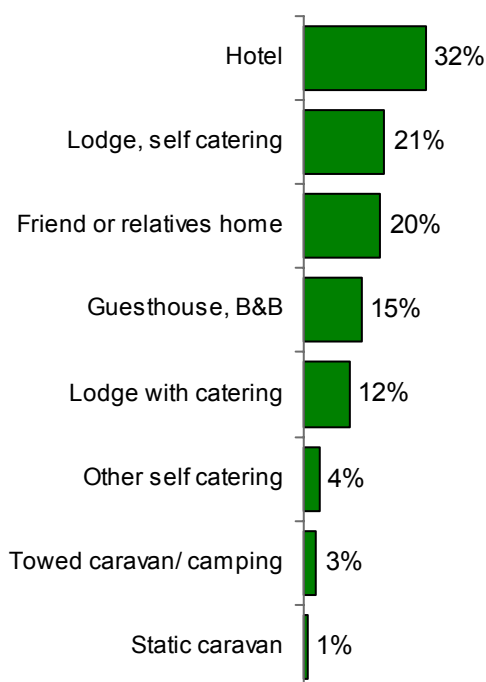
Overall, around a third of respondents read The Field (34%) on a regular basis, 30% read Trout and Salmon and 28% read Shooting Times.

Accommodation used and booking

The most frequently used types of accommodation during country sports trips taken in Scotland were hotels (32%), self catering lodges (21%) and the homes of friends or relatives (20%). In total around a third of respondents used lodge accommodation (21% self catering, 12% catered).

Figure C-15 –Accommodation used during most recent trip in Scotland (%)

Base: Respondents who have taken country sports trips in Scotland since 2002 (487)



It is interesting to compare the different types of accommodation used by participants of different country sports. The key variations included the following:

- *Salmon angling* – participants of this sport were particularly likely to stay in a hotel (41%).
- *Trout angling* – more likely to stay in self catering accommodation that was not a lodge (14%) or at the home of a friend or relative (27%).
- *Coarse angling* – a much larger proportion of coarse anglers stayed overnight in a towed caravan or camped (21%).

- *Deer stalking* – the majority of trips taken to undertake this activity involved stays in a lodge either with catering (32%) or on a self catering basis (43%).
- *Pheasant shooting* – the most used type of accommodation amongst this group was the homes of friends and relatives (41%).
- *Grouse shooting* – the majority of those who took part in this activity stayed in either a lodge on a self catering basis (44%) or in a hotel (41%).

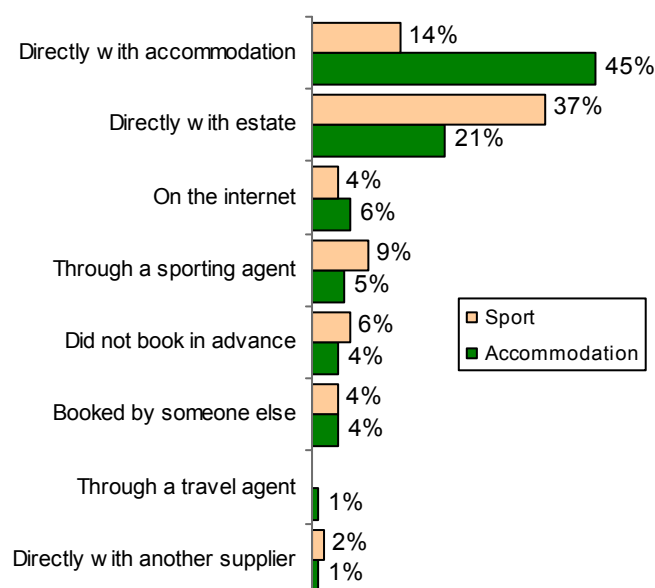
In terms of origin, Scots were the most likely to stay at the homes of friends or relatives while international visitors were more inclined to use a hotel or lodge.

Respondents were also asked to indicate how they had booked their country sports and their accommodation for their most recent holiday or short break in Scotland.

As the chart illustrates, the most frequently used ways of booking sport were directly with the estate (37%), directly with accommodation (14%) or through a sporting agent (9%). Some 6% indicated that they did not book their sport in advance.

The most frequently used ways of booking accommodation were directly with the accommodation (45%) and directly with the estate (21%). 6% used the Internet - a method slightly more likely to be used by those aged 35 to 44 (9%).

Figure C-16 –Methods of booking country sports and accommodation for most recent trip in Scotland (%)
Base: Respondents who have taken country sports trips in Scotland since 2002 (487)



The methods used to book country sports varied according to the sports undertaken. Most of those who had taken part in salmon angling, deer stalking or grouse shooting booked this directly with an estate (53%, 57% and 70% respectively) while over a quarter or coarse and sea anglers did not book in advance (28% and 27%).

Methods of booking accommodation also varied by sport with those who went deer stalking or grouse shooting most likely to organise this directly with the estate (45% and 44% respectively) while game anglers were more likely to deal directly with an accommodation establishment (59%). By comparison, coarse anglers and sea anglers were more likely not to book accommodation in advance (28% and 14%).

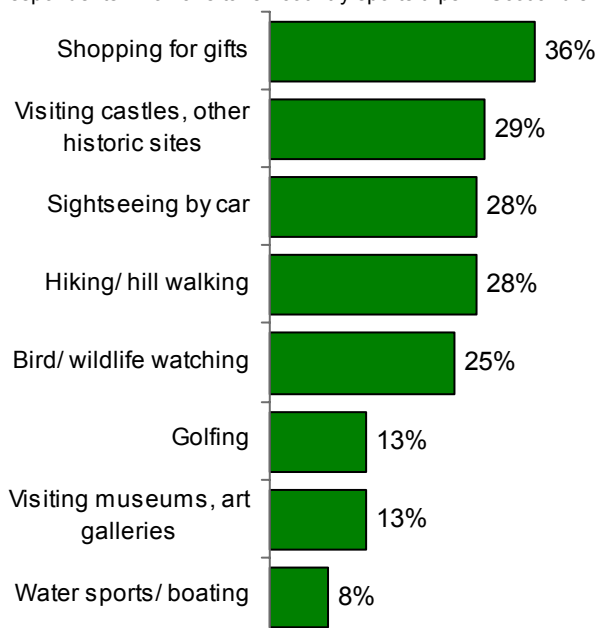
Other activities undertaken

In addition to providing information on the country sports undertaken during trips taken in Scotland, respondents were asked to indicate whether they or other members of their parties undertook any other activities.

As the chart shows, the activities undertaken by at least a quarter of respondents were bird and wildlife watching (25%), hiking and hill walking (28%), sightseeing by car (28%), visiting castles and other historic sites (29%) and shopping for gifts (36%). Around an eighth (13%) played golf.

Figure C-17 –Other activities undertaken during most recent trip in Scotland (%)

Base: Respondents who have taken country sports trips in Scotland since 2002 (487)



It is interesting to compare the non-sporting activities undertaken by respondents who took part in the various types of country sports:

- *Salmon angling* – respondents who took part in salmon angling were more likely than average to go shopping for gifts (41%) or to visit castles or other historic sites (38%).
- *Trout angling* – similarly, trout anglers and their parties were more likely than average to have gone shopping for gifts (43%) or to have visited castles or other historic sites (57%). These respondents were also more likely to have undertaken bird or other wildlife watching (41%), hill walking (51%) or sightseeing by car (41%).
- *Coarse angling* – respondents who took part in this sport were less likely to have been involved in any other activities.
- *Deer stalking* – compared to the profile of all respondents, deer stalkers were more likely to have taken part in hill walking (45%) or bird and wildlife watching (32%).
- *Pheasant shooting* – nearly a quarter of respondents who shot pheasants (22%) also played golf during their trip in Scotland.
- *Grouse shooting* – respondents who took part in grouse shooting were the most likely to also go shopping for gifts (63%) or to play golf (30%).

The non-sporting activities undertaken also varied according to the place or residence of respondents with Scots less likely to undertake any of those listed, while international visitors were more likely to do so.

Satisfaction and issues

To help identify opportunities for the development of county sports in Scotland, respondents were asked a number of questions regarding the quality of their experiences in Scotland, possibilities for improvements and possible barriers to future visits.

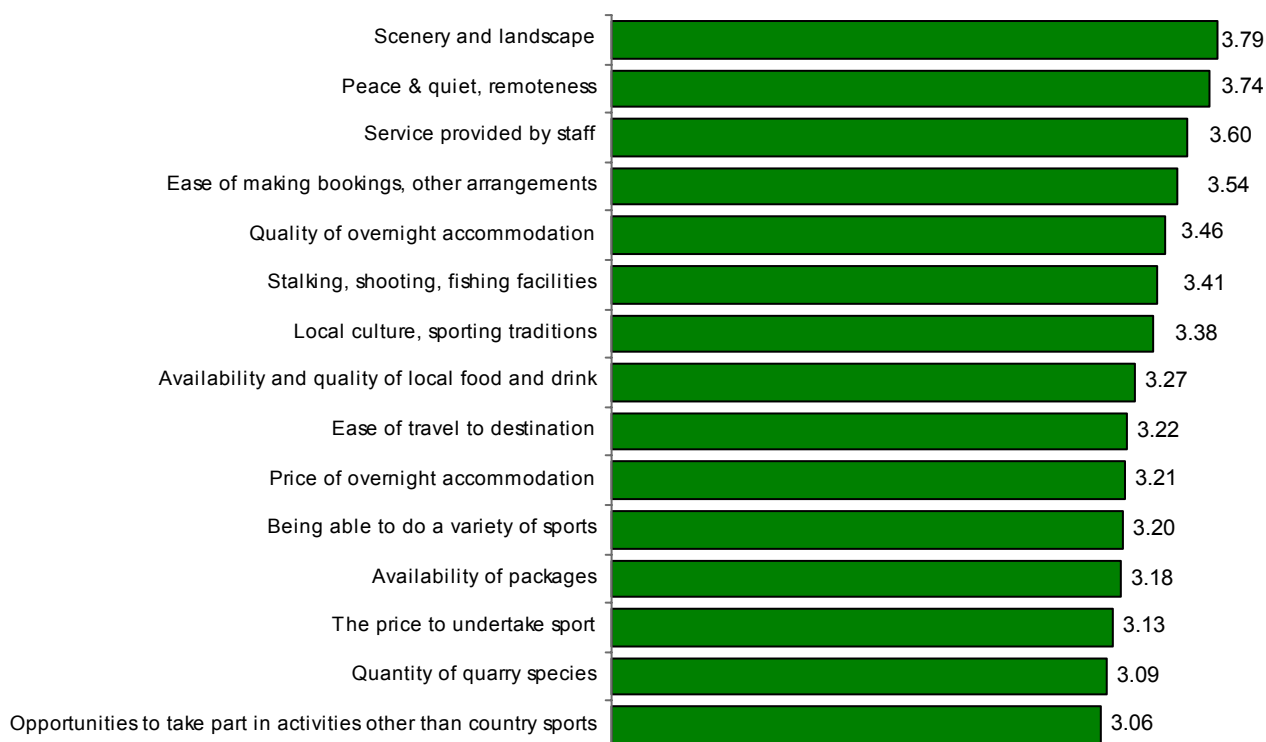
Satisfaction with Scotland

Firstly, respondents were asked to indicate how satisfied they had been with a list of factors during their most recent trip to Scotland. Possible answers ranged from 'not at all satisfied' (score of 1) to 'very satisfied' (score of 4). The chart below illustrates the average scores obtained across all respondents ranked from the most satisfactory overall to the least satisfactory.

The aspects of Scotland which received the highest scores overall were the scenery and landscape (3.79), peace, quiet and remoteness (3.74) and the service provided by staff such as keepers or ghillies (3.60). The lowest scores were obtained for the prices to undertake sport in Scotland (3.13), the quantity of quarry species (3.09) and the opportunities to take part in other (non-sporting) activities (3.06).

Figure C-18 –Satisfaction with aspects of Scotland as a country sports destination (1=Not at all satisfied; 4 = Very satisfied)

Base: Respondents who have visited Scotland since 2002 (487)



Respondents who were dissatisfied with any of the factors listed were asked to specify why. The main reasons given included the following:

- Low water in rivers.
- Lack of fish caught.
- General shortage of fish (esp. salmon).
- High cost and poor value for money.
- Quality of overnight accommodation.
- Quality of places to eat out.
- Transport.
- Unfriendly locals.
- Scottish politics.

While the chart on the previous page ranks the factors according to the ratings provided by *all* respondents, it is also useful to compare the scores provided by each of the particular types of country sports participants:

- *Salmon angling* – higher scores than average were provided by salmon anglers for the quality and price of overnight accommodation, the availability of local food and drink and the ease of making bookings. Lower scores were provided by this group for the quantity of quarry species, fishing facilities and services, the availability of packages and being able to take part in other activities.
- *Trout angling* – these respondents provided higher scores than average for the price to undertake the sport, the scenery and landscape and local culture/ sporting traditions. However, they provided lower scores for the quantity of quarry species, ease of travel to the destination and the availability of packages.
- *Coarse angling* – participants of this activity provided higher scores for the scenery and landscape and peace and quiet but lower scores for fishing facilities and

services, services provided by staff (e.g. ghillies) and opportunities to take part in other country sports.

- *Deer stalking* – those who took part in this activity were more likely to rate the quantity of quarry species, stalking facilities and services, the price to undertake the sport, the service provided by staff (game keepers, etc.), the quality of overnight accommodation, scenery and landscape, peace and quiet and the availability of packages highly.
- *Pheasant shooting* – participants of this activity were likely to be more satisfied than average with most parts of their trip – most notably with the quantity of quarry species, shooting facilities and services, the services provided by staff, scenery and landscape and the ease of making booking arrangements. However, these respondents were slightly less satisfied than average with the quality and price of overnight accommodation.

In terms of place of residence, respondents who lived in Scotland were most critical and provided lower scores for almost every aspect while the highest scores were provided by international visitors.

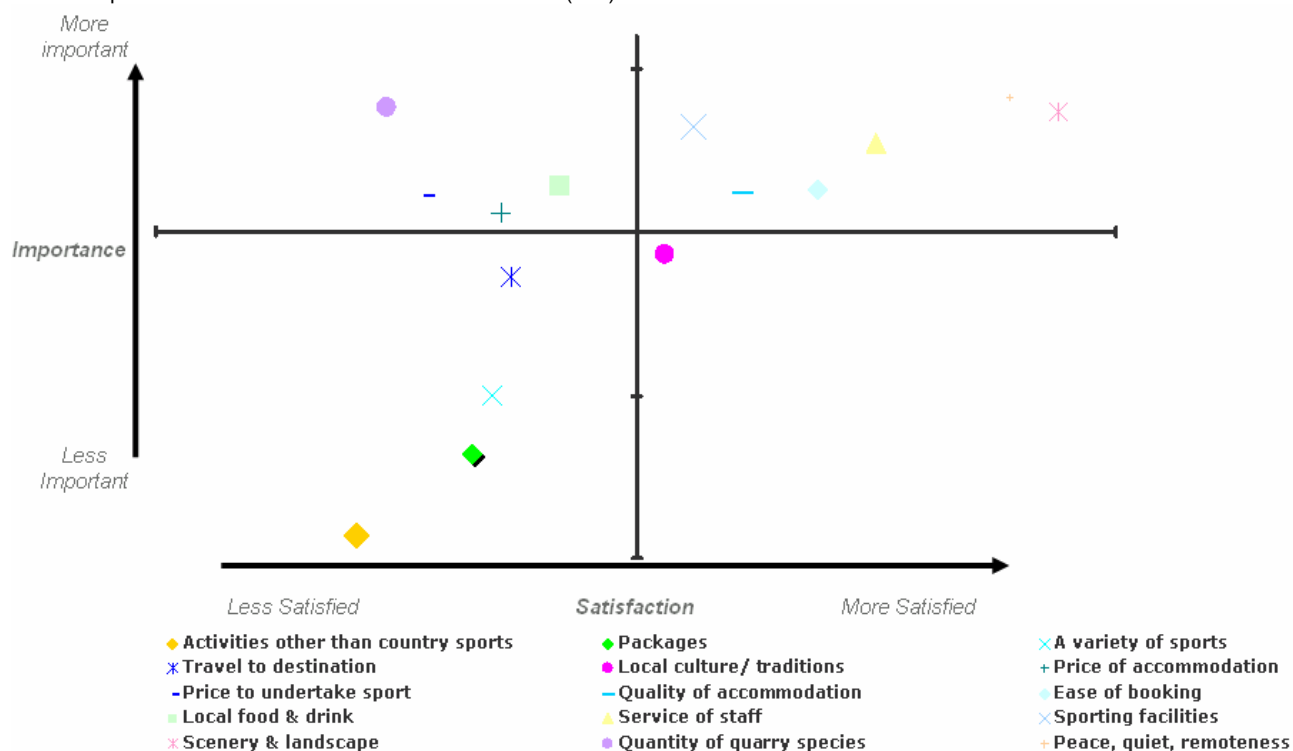
Identifying key issues

The charts on pages 15 and 28 illustrated a ranking of the overall levels of importance and levels of satisfaction visitors have with different aspects of the ‘country sports experience’ in Scotland. It is useful to combine these two measures to identify the elements which are most relevant to improving quality.

The chart overleaf presents each of the elements rated in terms of both importance and satisfaction with satisfaction varying from left to right and importance varying from top to bottom. The centre point is where the ‘average’ importance crosses the ‘average’ satisfaction score.

Figure C-19 –Satisfaction and importance – identifying key issues

Base: Respondents who have visited Scotland since 2002 (487)



Each element has been plotted in the 4 quadrants as follows:

Bottom right – *More Satisfied - Less Important* – Local culture and traditions. Visitors are generally satisfied with this element although it is rated as slightly less important on average.

Bottom left – *Less Satisfied – Less Important* – Transport to destination, a variety of sports, packages and activities other than country sports. Overall, visitors were slightly less satisfied than average with these aspects but they are also seen as less important by most visitors. These elements can therefore be considered as lower priorities for investment overall.

Top right – *More Satisfied – More Important* – Scenery and landscape, peace, quiet, remoteness, service of staff, ease of booking, quality of accommodation, sporting facilities. Elements in this quadrant are rated highly in terms of both importance and satisfaction. These are Scotland's key strengths which should be maintained and promoted.

Top left – *Less Satisfied – More Important* – Quantity of quarry species, price to undertake sport, price of accommodation, local food and drink. Elements which are in this quadrant

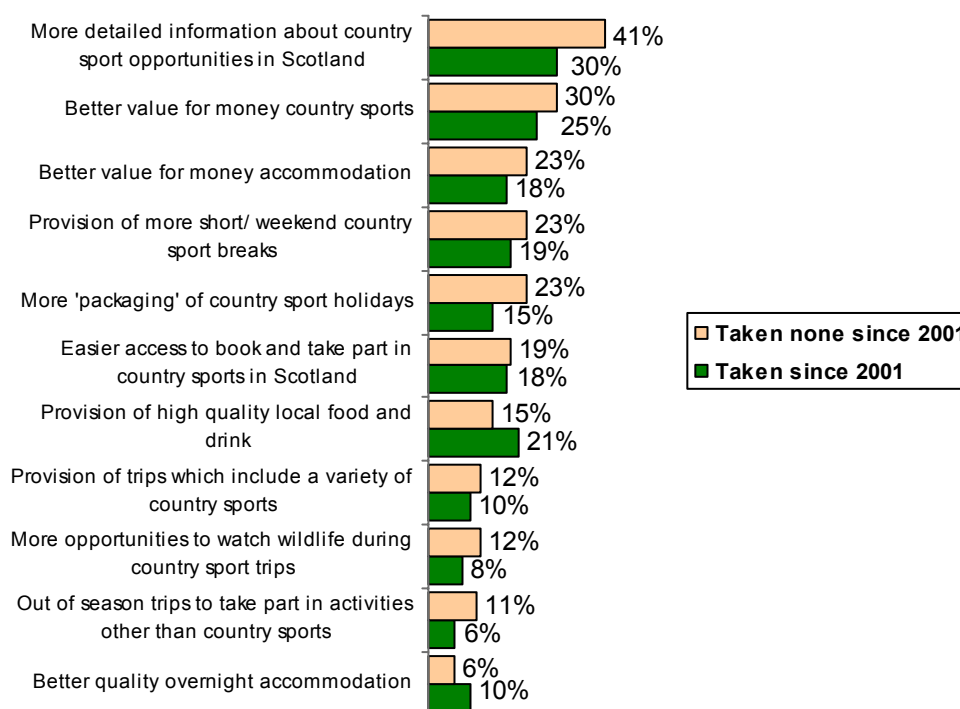
are rated as more important than 'average' but have received lower satisfaction scores. These are elements which possibly require further attention.

It is important to note that the scores presented in this chart are averages across *all respondents* to the survey. It should be remembered that the scores for satisfaction and importance varied between different types of visitor and sport so their priorities will also differ.

Opportunities for improvements

All respondents who had taken part in any country sports since 2002 were presented with a list of options and asked which, if any, would encourage them to take trips to Scotland more often. In the following chart the answers provided by respondents who had taken trips in Scotland since 2001 are separated from those provided by those who had not visited recently.

Figure C-20 –Improvements which would encourage future country sports trips in Scotland (%)
Base: Respondents who have visited Scotland since 2002 (487)



Those respondents who had visited Scotland since 2001 were most likely to state that they would visit more often if more detailed information was provided on country sports

opportunities in Scotland (30%), if the sports provided were better value for money (25%) or if higher quality food and drink was provided (21%).

By comparison those respondents who had not visited Scotland were even more likely to state that they would visit more often if more information was provided on country sports opportunities (41%), if the sports provided were better value for money (30%), if accommodation was better value for money (23%) or if there were more short break opportunities (23%) or better packaging of sports (23%).

It is useful to compare the factors selected by respondents who had undertaken different country sports during their most recent visit to Scotland:

- *Salmon angling* – participants of this activity were slightly more likely to suggest that better value country sports (29%) would make them more likely to visit Scotland.
- *Trout angling* – these respondents were more likely to state that easier access to booking (25%), more ‘packaging’ (19%), the provision of more short and weekend breaks (25%) and better value for money would encourage them to visit Scotland more often.
- *Coarse and sea angling* – participants of these activities more likely than others to select better value accommodation.
- *Deer stalking* – deer stalkers were generally less likely than other respondents to select any of the possible changes as possible ways of increasing the number of trips they would take in Scotland. Around a third suggested that more detailed information on country sports opportunities would be useful (32%).
- *Pheasant shooting* – participants of this activity were more likely to suggest that the provision of more short and weekend breaks (25%) and better quality local food and drink (31%) may influence them to visit more often.
- *Grouse shooting* – in common with those who took part in deer stalking, salmon angling, coarse or sea angling, respondents who participated in grouse shooting were less likely than average to select any of the possible changes.

In terms of places of residence, respondents living in Scotland were more likely than others to state that better value accommodation (25%) and improved local food and drink (28%)

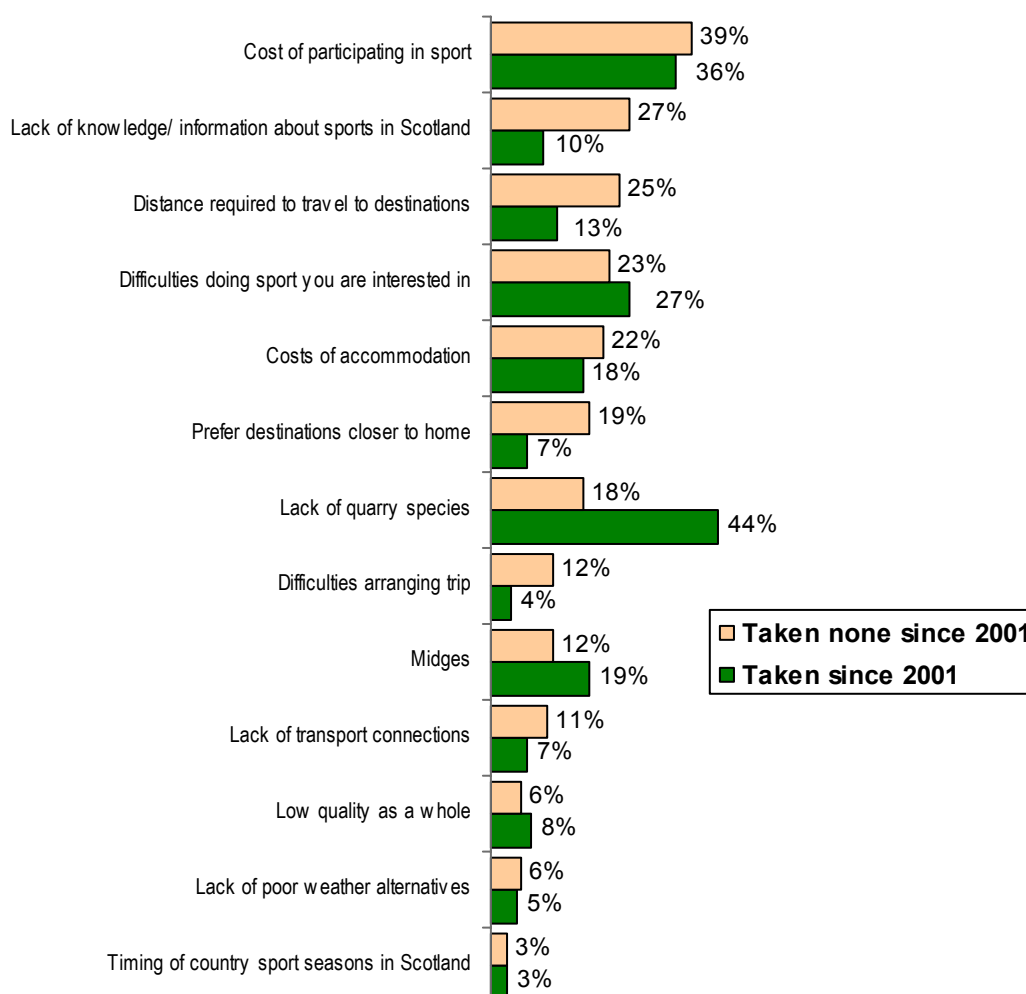
would influence them to take more trips and respondents from England or Wales were the most likely to be influenced by more short break opportunities (22%). International visitors were more likely to suggest that more information and/ or packaging of country sports products may influence them to visit more often.

Barriers to visiting Scotland

All respondents who had taken part in any country sports since 2002 were asked to indicate what factors, if any, had discouraged them from taking country sports trips in Scotland. In the following chart the responses provided by those who had visited since 2001 are illustrated separately from those of non or lapsed visitors.

Figure C-21 –Barriers to taking country sports trips in Scotland (%)

Base: Respondents who have visited Scotland since 2002 (487)



Those respondents who had visited Scotland since 2001 were particularly likely to indicate that their main reasons for not visiting more often were the lack of quarry species (44%), the cost of participating in sport (36%) and difficulties being able to do the sport they were interested in (27%).

The main reasons provided by those who had not taken any trips since 2001 were the cost of participation (36%), lack of knowledge or information about sports in Scotland (27%) and the distance required to travel to the destination (25%).

The elements likely to discourage future country sports trips in Scotland varied between participants of different activities:

- *Salmon angling* – participants of this sport were more likely than others to state that the lack of quarry species (56%) and costs of participation (45%) would discourage future trips.
- *Trout angling* – larger proportions of trout anglers were discouraged by the costs of overnight accommodation (37%).
- *Coarse and sea angling* – participants of both of these activities were particularly likely to be discouraged by the lack of suitable quarry species in Scotland (59% and 62% respectively), difficulties being able to undertake the sport they are interested in (38% and 35%) and midges (34% and 32%).
- *Deer stalking* – deer stalkers were more likely than the average to be discouraged by the costs of participation (42%).
- *Grouse shooting* – these respondents were particularly likely to be discouraged by the cost of participation (56%) and a lack of suitable quarry species (44%).

The reasons selected also varied according to the respondent's place of residence with those who lived in Scotland most likely to mention midges (21%) and English and Welsh respondents more likely to be discouraged by a lack of suitable quarry species (38%) and the distance required to travel to destinations (22%). International respondents were the most likely to mention the costs of participation (55%) and lack of knowledge about sporting opportunities in Scotland (48%).

D. Qualitative research

Respondent profiles

To obtain the views of suppliers of country sports in Scotland and intermediaries, a series of in-depth consultations were undertaken with a sample of representatives. A total of 30 interviews were undertaken with members of the following stakeholder groups:

- *Estates* – for these respondents country sports were part of a mix of activities undertaken to generate revenue, create rural employment and maintain land. A wide range of country sports were provided across the estates spoken to including game fishing on rivers and lochs (salmon, sea trout, brown trout), game bird shooting (wild/ reared, walked up/ driven), deer stalking and rough shooting (e.g. hare).

Some of the estates spoken to also provided other recreation activities such as clay pigeon shooting, golf, off-road driving and shopping/ guided trips. Most of the estates were able to supply bespoke ‘packages’ which combined activities, transport, accommodation, etc.

- *Associations*– a number of the main UK and Scottish country sports associations were included in the consultations. As such it was possible to gain insight regarding as wide a variety of sports as possible including coarse angling, sea angling and rainbow trout angling.
- *Agents and estate managers* – several of the main country sports agents and estate management companies were spoken to. The information obtained from these consultees generally provided a greater ‘overview’ of the industry.
- *Overseas* – in addition to speaking to UK based organisations, consultations were undertaken with overseas based agents, European associations and an angling journalist based in Scandinavia.

Current markets

During the in-depth interviews respondents were asked to provide details of their current markets and/or the people that their organisations represent.

Most of the estates attracted fairly small numbers of high spending, repeat clients. For example, an individual estate may attract 8 or 9 groups of around 10 individuals to take part in stalking during a single season. Often a particular host would invite guests to take part in shooting or stalking during the same week each year. By comparison salmon angling involved larger numbers of visitors to each estate but these visitors were also likely to be on repeat trips.

While many clients were in the upper AB social classes, this was not always the case:

“The myth is that it’s for posh folk. It’s not. It’s extraordinary – builders, plumbers, working trades, especially from Europe. The whole range – it’s impossible to categorise.”

When asked to outline the typical itineraries of their clients, responses provided by estates included the following:

- *Typical UK resident itinerary:* fly London to Edinburgh on Friday, drive north, eat out and stay in a high quality hotel, do a morning shoot, fly home.
- *Typical US resident itinerary:* in Scotland for a week, shoot at 3 or 4 different estates.

The estates spoken to were generally not involved in the provision of rainbow trout or coarse angling. However, the associations which represent these sports provided details of the ‘typical’ profile of participants:

- *Rainbow trout anglers:* large day trip market using local fisheries, wide age spectrum including children, tourists may spend less on permits but will spend as much as game anglers on overnight accommodation, food and drink, etc.

“..they stay in the same hotel as the salmon angler and instead of one of them there’s three.”

- *Coarse anglers:* drive from home (Scotland or North of England) and camp over.

Changing markets

In addition to being asked about the current status of the country sports markets, consultees were asked to comment upon any changes in the markets over the previous years and how they saw markets developing in the future.

The general view amongst the estates and agents spoken to was that customers were becoming increasingly discerning regarding value for money in terms of both quality obtained and the prices charged. Related to this, customers increasingly expected more than the core 'country sports' product to enhance their experience in Scotland.

Due to the increasing demands of customers and increasing international competition it was also suggested that estates increasingly needed to be more pro-active in the marketing of their services in terms of both product development and communications.

To summarise, the key market changes noted by respondents were as follows:

- *Increasingly discerning* – in general country sports participants are more aware of quality than other tourist markets.

“..these are all very spoilt people!”

- *More awareness of costs* - “*there are no blank cheques*” – clients are also increasingly aware of the costs to take part in country sports and the value for money obtained. Ability to pay is also affected by factors such as stock market success, levels of bonuses paid, etc.
- *Need to 'add value'* – clients increasingly want to be entertained. For example as fish numbers decline, clients look for a more complete package which might include golf, shopping, clays, etc.
- *Need to market pro-actively* – in the past many estates would expect regular repeat bookings from most of their clients. Today these repeat bookings can no longer be expected as clients become more concerned with value for money and alternative destinations emerge. Instead more effort may be needed by the estates to ensure client satisfaction and to communicate with potential customers.

“People used to be falling over themselves to get the cheque in to secure their sport for the next year. Our business now is to satisfy the tenants’ needs and being more proactive with them.”

- *General decline in demand/image* – this is perceived as a wider issue which especially affects stalking. It was suggested by a number of the consultees that certain sports are becoming less accepted by UK residents, especially younger people. It was also noted by some consultees that there is an ageing market for many country sports with limited numbers of new participants.
- *Increasing international competition* – this issues affected most of the different sports as the costs to take part in country sports overseas decreased and facilities and services improved. Specific destinations mentioned included Russia, Iceland and Eastern Europe.

Current marketing practices

The majority of the estate representatives interviewed indicated that most of their shooting, stalking and/or angling clients were repeat visitors or were the guests of regular clients. To ensure the return of these 'loyal' clients, the estates needed to ensure that clients were very satisfied with their trip. As the following quote illustrates, estates recognised that retaining customers was easier than attracting new markets.

“We make no apology for charging a Rolls Royce price in order to deliver a good product and it’s popular....it’s not easy to find new, young fishermen.”

It was also mentioned by some of the representatives that the sports which they provided would be fully sold every year with very little or no formal marketing required. This was most notably the case with grouse shooting which was described as 'self selling'. In this context, communications between estates and their clients were mainly informal and included personal phone calls or letters to people who had enquired about availability.

The Internet was seen as increasingly important amongst agents as both a cost effective method of providing information to potential clients and for on-line booking. While its role in the development of fishing markets was recognised (i.e. last minute sales, competitive prices, flexible time periods), the potential for transferring initiatives such as FishSalmon to

other sports was unclear because of the differences in market characteristics and practicalities such as obtaining permits.

Generally, the agents spoken to were more sophisticated marketers than the estates and had a wider knowledge and experience of the country sports markets and different approaches to marketing. As such they recognised the differences between the various sporting markets and the effectiveness of different types of communication including the Internet, brochures and attending exhibitions in the UK and overseas.

Scotland's strengths

Consultees were asked to indicate what they perceived as Scotland's main strengths as a country sports destination.

Reflecting the findings obtained from the quantitative survey, consultees were likely to suggest that Scotland's greatest strengths as a country sports destination included the 'experience', the scenery and the unique sports.

The Scottish experience was seen as especially important to international visitors and those who took part in shooting, stalking and game angling. It was suggested that this appeal reflected the depth of sporting heritage and tradition in Scotland including the unique lodge-based experience, log fires and whisky in the evenings and romance.

“If people are going deer stalking, they want the stalkers to turn up in estate tweed. If they're grouse shooting, they want to see all the staff in estate tweed. They want to see the pony not some guy in army gear on a quad bike.”

By comparison it was suggested that the Scottish experience was much less relevant to coarse and sea anglers.

Scotland's scenery was also mentioned by the majority of respondents as a particular strength. It was suggested that few other countries could provide the same combination of sports and scenery and that the wide open spaces to be found in Scotland provided the privacy that many clients sought.

The wide variety of sports available to visitors in Scotland were also praised by most of the consultees. The fact that sports such as grouse shooting are unique to Scotland was seen

as a strength and Scotland was seen to offer some of the best *wild* sporting opportunities, making the experience more genuine, and therefore more enjoyable.

“..if you look at the grouse and salmon fishing, it’s the wild aspect, it’s wild game. It’s very much a natural sport.”

A number of other strengths of Scotland as a destination were mentioned by respondents including ethics and safety records, proximity to markets, genealogical connections and the professionalism of the industry.

Scotland’s weaknesses

Consultees were next asked to indicate what they perceived as Scotland’s main weaknesses as a country sports destination.

An issue which emerged related to the complexity of the country sports industry and markets. It was acknowledged that the suppliers of the product were numerous and diverse in nature, including estates, fisheries, agents, accommodation providers, transport providers and all of the other services that make up a 'country sports' trip. Similarly, the market was recognised as being extremely segmented with the profile, attitudes and demands of the participants of each sport varying greatly. As such, any overriding strategy to develop country sports would be difficult to create.

Another issue suggested was the low levels of awareness of Scotland as a destination for country sports, especially outwith the UK. An example provided was the lack of knowledge amongst potential visitors that the Tweed is the best salmon river in Europe.

It was also suggested that Scotland is perceived as an expensive destination, especially for salmon fishing and shooting. These comments related not only to the costs to take part in the sport but also for other services such as overnight accommodation. An example was given of a 5 night trip to South Africa to take part in country sports costing less than the equivalent trip to Scotland.

Related to the perceptions of expense were other concerns regarding the levels of quality in Scotland, particular in terms of overnight accommodation and eating out. Numerous examples and anecdotes of poor customer service were provided and it was suggested that quality was particularly important to the country sports markets who are more discerning than other, general tourist markets.

It was also suggested, by a smaller number of consultees, that the services provided by estates could be below expectations due to inflexible pricing/ itineraries or poor quality ghillies or keepers.

“If I find that the keeper can’t work with the clients then I just don’t use that estate.”

The low numbers of salmon to be caught in Scottish rivers was also given as a weakness and increasing threat with some respondents suggesting that ultimately clients would not return to Scotland if their catch levels remained low. This finding also reflects those of the quantitative survey and must be considered as a major issue.

The attitudes of the Scottish Executive and their actions or lack of actions were also discussed. Some respondents stated that they felt that the Scottish Executive and public sector agencies in Scotland had a poor understanding of the economic importance of country sports and did not demonstrate their support sufficiently. It was suggested that they should protect country sports by controlling fish farming and buying out commercial nets. It was also stated that uncertainty regarding future legislation changes related to land reform or firearms may stifle investment into the sport.

Which sports to develop?

Respondents were asked to provide their opinions regarding the country sports with the most potential for development. Not surprisingly, a wide variety of responses and views were provided with consultees generally suggesting that the sports they offered or represented had the greatest potential for future development.

While some respondents suggested that the sports in which the quarry could be reared and released such as rainbow trout and partridge had potential for development, larger numbers suggested that Scotland should further exploit the more unique, wild species such as brown trout or grouse.

However, it was generally recognised that it would be difficult to develop those sports which were already sold to ‘capacity’ such as salmon angling or grouse shooting.

“..there’s no point selling daft parts of the season.”

Some respondents questioned whether these sports were actually sold fully to capacity and quoted examples such as FishSalmon which had successfully increased the market size for specific rivers. It was also suggested the availability of 'good days' for angling could be improved with careful management (e.g. the River Tweed).

Other specific comments made regarding individual sports and their potential for development included the following:

- *Rainbow trout angling* – representatives of this sport suggested that rainbow trout fishing is a 'massively underdeveloped' market. It was stated that Scotland has over 300 fisheries with better and bigger fish than in the USA where the potential market is huge.
- *Wild brown trout angling* – this sport was also seen to have significant unexploited potential, especially in the North West Highlands. Wild trout fishing is unique to Scotland, less expensive than salmon fishing but still of a high quality and abundance. Again it was commented that there is large, relatively unexploited market for trout fishing in the USA.
- *Coarse angling* – widely varying opinions were provided regarding the potential to develop this sport in Scotland. Those in support suggested that pike fishing provided the greatest opportunities with a large potential market in England. However, there was generally less support for the development of coarse angling amongst those with interests in game angling.
- *Deer stalking* – the large supply of deer in Scotland was recognised by some respondents as providing opportunities but it was also noted that there is a generally declining demand for this sport amongst UK residents. It was suggested that demand for this sport may be greater and increasing overseas.
- *Shooting* – faced with issues relating to supply of wild grouse respondents suggested that there may be potential to develop more reared and released species as a 'substitute' e.g. partridge. It was also suggested that there may be scope to develop walked up shooting, an approach which is often preferred by Europeans.

European perspective

As mentioned previously, five of the consultees were based outwith Scotland. Two were representatives of agencies who provided country sports trip to destinations world wide, including Scotland, two represented European associations and one was a journalist with a Scandinavian fishing magazine. The consultations provided opinions regarding the profile of country sports participants, Scotland as a destination and opportunities from an international perspective.

Scotland's strengths, as perceived by these respondents, included the use of the English language, good management and safety, easy access, the provision of activities other than country sports (e.g. whisky and shopping), the combination of abundant quarry species and scenery, quality overnight accommodation, friendliness and hospitality and the Scottish atmosphere and history.

Conversely, overseas respondents indicates that weaknesses of Scotland included unclear and inflexible pricing, high prices to take part in sports, strict rules preventing shooting and stalking on Sundays, bureaucratic rules regarding the transport of firearms, low fish stocks and difficulties obtaining angling permits. Generally the greatest concerns related to angling in Scotland, especially regarding the lack of stock.

From an international perspective, the following countries were seen as potential growth markets for Scotland, each with its own unique characteristics:

- *Denmark* – the country with the most hunters per capita amongst all of the Nordic countries. Danes are often interested in traveling overseas to take part in country sports and prefer shooting stags. In terms of scenery, Denmark is the most different of the Nordic countries from Scotland.
- *Spain* - Spanish hunters are particularly interested in stalking roe deer. It was mentioned that Spaniards were often 'trophy' focused so the product would need to be adapted accordingly.
- *Italy* - Italians tend to be interested in all kinds of hunting but especially birds, particularly geese.
- *France* – it was commented that the French '*will hunt anything!*'

- *Germany* - Germans in general prefer 'traditional hunting' such as hill stalking, shooting pheasant and grouse. They are the European market seen as most likely to go abroad.

Trends commented upon by these consultees included an increasing interest in fly fishing, a market in which Scotland's main competitors were Iceland, Russia, Norway and Sweden.

As found in the quantitative survey and consultations with UK based representatives, these respondents stressed that the importance of the Scottish experience should not be underestimated. As the representative for one of the European associations put it: "*Do not offer French hunters French cuisine*".

Product development

As part of the consultations respondents were asked to provide their opinions on the best ways to develop Scottish country sports for tourism. A number of the ideas provided by respondents related to improving and developing the Scottish country sports tourism 'product'.

Ensuring good customer service

A frequently discussed area related to the quality of service provided by the sports providers and amongst the wider tourism industry. This area was seen as vital given the importance of customer retention and referrals.

While the idea of a formal 'code of conduct' for the front-line staff such as ghillies, stalkers, game keepers and lodge house keepers was generally seen as unnecessary, there was greater support for more general customer service training. Initiatives such as 'Welcome Fisher' had been well received and could help to ensure that the services provided by staff were at least as high as clients expected.

Guiding services

Developing this idea, some respondents suggested that a wider 'guiding' service would be appreciated by potential customers. This would involve the provision by staff of more than just the sport, for example meeting clients at the airport, showing them to the hotel, acting as a guide, advising on tackle and explaining all of the processes taking place during the

day of sport. It was suggested that such services may have greatest potential for wild trout or coarse angling and examples of existing 'safaris' were provided.

“..it is a well known fact that if a guy is successful in fishing it is because he is so good, if he is not successful it is always the ghillies fault!”

Diversification of sports

Other potential areas of product development raised by respondents included the diversification of the sports offered by estates. Some agents suggested that the potential of alternatives such as wild brown trout angling or walked up shooting should be considered by estates. However, it was recognised that the possibilities these sports provided for generating revenue would have to be demonstrated to estates.

Overnight accommodation

The quality of overnight accommodation was also mentioned as an area which could be developed, both in terms of the availability of high quality hotels in rural areas close to where sport was undertaken and awareness of the special requirements of participants (e.g. storage for firearms, drying rooms, flexible meal times, knowledge regarding places to fish).

New markets and novices

While estates relied greatly upon repeat visitors, it was recognised by some respondents that new customers must be attracted in the longer term. A possible product development which could help to develop their own markets, and promote country sports more widely, was the introduction of introductory 'courses' for young people and other novices. It was suggested that these courses could help to educate the participants about the importance of country sports and their role in society and involve associated activities such as clay pigeon shooting or target practice.

“..it will knock on then little Johnny will want to come back to Scotland and do it again.”

Packaging

Consultees recognised that international visitors were particularly likely to want to combine country sports with other activities such as sightseeing elsewhere in Scotland and the UK

generally. Many of the agents already provide high quality, bespoke packages which reflect the close relationships they have with shooting and stalking clients. There may be further opportunities to develop high quality fishing lodges which combine overnight accommodation, high quality food and drink and the services of a guide.

Non-sporting activities

The inclusion of non-sporting activities within a country sports trip are particularly important for members of the group who are not participating and for times when sport can not be undertaken (e.g. when water is low, Sundays). A possibility is the development of wildlife watching trips/ guided walks or, at least, the provision of information in accommodation regarding things to do in the local area.

Flexibility

A number of consultees raised issues regarding the traditional ways in which certain sports were sold. It was suggested that selling rods by the day rather than by the week could increase the market size by selling 'last minute capacity'. Also, it was suggested that stalking parties should be provided with the opportunity to let accommodation for shorter periods than a week and that smaller lodges or alternative accommodation should be made available to smaller groups.

A number of other product development suggestions were made by the consultees including the provision of more firearms storage for use by visitors who want to spend time sightseeing elsewhere in the UK and more tackle hire facilities for anglers.

Communications development

Improved communications were also seen as an area of opportunity for the country sports industry.

Within the industry

As discussed previously, respondents realised that the fragmented nature of the country sports industry was an issue which could create a barrier to development. All of the UK based consultees were keen to work together to develop country sports tourism and it was generally agreed that there was need to organise workshops/ seminar events which could be attended by all parts of the industry including estates, agents, fisheries, associations and the public sector.

As such, it was generally agreed that more communication was required between the different stakeholders including the estates, agents and public sector.

“The salmon boys never use to talk to the trout, and the trout never talked to the salmon, and the coarse fishing boys were the anti-Christ. This has all started to change and we want the same thing now. We all realise that we want the same thing.”

Raising the profile of country sports

Another key area of communication which was suggested frequently was the need to improve the profile of country sports amongst VisitScotland and the other public sector organisations involved in tourism. The resources allocated to the development of golf were frequently referred to with respondents suggesting that similar effort should be given to the development of country sports tourism.

It was also stated that greater lobbying was required to encourage the Scottish Executive to take action to protect the country sports product by, for example, buying out commercial nets.

Raising profile of Scotland as a country sports destination

A further area of communication suggested was the promotion of Scotland as a country sports destination. With awareness of the quality of Scotland's country sports product seen as an issue it was suggested that more should be done by the industry

to work with agents in the UK and overseas, to be present at relevant exhibitions and to obtain publicity and testimony in relevant publications (e.g. by working with high profile authors). The aim should be for Scotland to be widely perceived as the best country sports destination in the world.

Information

Reflecting the quantitative survey results, a number of the representatives of estates and the organisations spoken to suggested that the amount and quality of information available on country sports opportunities in Scotland should be improved. Ideas included the development of the information on-line on websites such as visitscotland.com and other portals linking estates and agents. Others suggested that brochures and directories should be produced and distributed to enquirers, at TICs, exhibitions, etc. It was also suggested that the industry should work more closely with UK and international agencies and corporate hospitality/ incentive houses to develop their awareness of opportunities in Scotland.

“We should be on the search engines. That could be done tomorrow and they certainly don’t need to have a survey to find out whether it is necessary.”

Marketing messages

Finally, it was clear from the varying responses obtained in the consultations that communications regarding country sports in Scotland must recognise that each sport has a unique market with very different characteristics. While different methods of communication may work best for different sports, common messages can reflect the shared attractions e.g. scenery, wilderness and the quality of facilities.

E. Conclusions and recommendations

A fragmented industry

- The country sports tourism market is extremely complex with numerous different organisations involved in the supply of its products and a wide variety of market segments. The survey has clearly illustrated the different profiles of participation in each sport and the varying motivations in destination choice. The laws of supply and demand are pertinent with prices generally highest in sports where supply is most restricted (e.g. grouse shooting) but lower where supply is greater or demand is lower (e.g. brown trout angling, rainbow trout angling, deer stalking).

Quality, prices and value for money

- Value for money has been identified as an issue. Decreasing prices is unlikely to be a viable option for most suppliers so the quality of the product needs to be developed together with improved communication of the opportunities to take part in lower priced sports (e.g. walked up shooting, rainbow or brown trout fishing).
- Raising the quality of experience obtained during country sports trips is essential if clients are to be retained and new visitors are not to be disappointed. A number of possible ways to ensure consistently high levels of quality across the industry have been suggested, including the training of front-line staff on estates, the development of guiding services for certain sports, the improvement of overnight accommodation and ensuring that a full variety of sporting and non-sporting activities are available to visitors (for example facilitating golfing or shopping trips, guided nature walks, clay pigeon shooting, horse riding). It is also important to emphasise the 'Scottishness' of the product to certain markets. However, the element most central to satisfaction is the quality of the sport itself and chances of angling, shooting or stalking success. The survey results suggest that action must be taken to reverse the decline in the number of salmon that may be caught in Scotland. There may also be opportunities to further develop sports where chances of success are higher (e.g. rainbow or brown trout angling).

Diversification and development of sports

- While certain sports are seen to already be selling to capacity, there are undoubtedly opportunities to increase participation in others. Possibilities suggested by the industry include the development of wild brown trout angling, rainbow trout angling, deer stalking and certain methods of shooting (e.g. walked up). In addition there may be opportunities to identify whether there is any capacity in sports such as salmon angling or grouse shooting and to investigate more flexible pricing and booking methods. For each of the sports which may be developed, individual product and communications strategies are required to ensure that the product is at the quality required and that the 'best prospect' markets are made aware of the opportunities that exist (e.g. US or European/ corporate or consumers).

Developing new markets

- The survey has clearly illustrated the ageing profile of country sports participants, most of whom have been participating for many years. It must be recognised that actions need to be taken to encourage new participants who will, in turn, take country sports trips to Scotland. Opportunities may exist through courses for young people, combining an introduction to country sports with other related activities such as wildlife watching. Given the loyalty of country sports participants to particular estates, the development of new and novice markets by estates can only help to ensure their longer term success as country sports destinations.

Information provision

- One of the barriers to visiting Scotland to take part in country sports is the lack of knowledge of the sports that can be undertaken and misperceptions regarding their cost and availability. Any future marketing communications must be supported by available practical information on the sports available, their cost, how they can be booked, etc. Any communications must emphasise Scotland's unique strengths as a country sports destination (quality, professional, traditional, scenery, wilderness, unique, genuine) whilst recognising the differences in the attitudes and needs of each country sport segment. The general perception that participation in country sports in Scotland is expensive should be dispelled by demonstrating opportunities to take part in lower priced sports such as rainbow or brown trout angling. The media used must be

appropriate e.g. obtaining coverage in specialist publications, ensuring recommendations by offering a quality product.

Communications within the industry

- This study has clearly demonstrated the wealth of experience and knowledge within the country sports industry and the enthusiasm to work together to develop tourism. It is vital now that there is a prioritisation of future actions. For example there have been suggestions to organise seminars and events to further discuss the way forward and how agents, estates, fisheries, associations and other stakeholders can work together with other parts of the tourism industry and the public sector.

F. Appendices

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