The Benefits and Volume and Value of Country Sports Tourism in Scotland

Executive Summary

A report prepared by
PACEC
on behalf of
Scottish Country Sports Tourism Group

PACEC
Public and Corporate
Economic Consultants
www.pacec.co.uk

49-53 Regent Street
Cambridge CB2 1AB
Tel: 01223 311649
Fax: 01223 362913

416 Linen Hall
162-168 Regent Street
London W1R 5TB
Tel: 020 7038 3571
Fax: 020 7038 3570

e-mail: admin@pacec.co.uk

August 2014

Ref: H:\1307\33SE\Rep\Draft\Draft Report with comments incorporated

Contents

Executive Summary

X1 Introduction

X1.1 The overall aims of the report were to assess the volume and value of shooting and fishing activities in Scotland, the nature of provision and the characteristics of participants. The report also draws some conclusions on the markets, the Scottish products, and potential future growth in activity.

X1.2 This report uses the results of four surveys carried out in 2014 to characterise country sports in Scotland in the years 2012/13, including the activities, participation, and trends. It assesses Scotland's strengths and weaknesses as a destination for country sports tourism, and the potential for future growth.

X1.3 The surveys covered shooting sports providers and participants across the UK, and fisheries and fishing tourists in Scotland. The questions for BASC and SCSTG were different in the surveys, which means not all the results can be compared directly for the two sectors.

X2 Volume and value of country sports tourism

X2.1 A total of 910,000 visitor nights were spent in Scotland in 2012/13 for country sports tourism, resulting from 270,000 trips. The total expenditure was £155m. Freshwater fishing gave rise to the majority of the visitor nights, and was associated with longer trips. Expenditure per night was greater for shooting and stalking.

Table X1 Volume and value of country sports tourism

	Volume and value statistics		
	Trips	Nights	Expenditure
Freshwater fishing	140,000	630,000	£86m
Shooting and stalking	130,000	280,000	£69m
All country sports	*270,000*	*910,000*	*£155m*[1]

Source: PACEC

X2.2 37% of shooting and stalking providers, and 38% of fisheries, stated that their income had risen over the past five years, and especially in the last two years. The number of individual anglers had not risen significantly – fisheries were almost as likely to report a decrease as an increase. This suggests a reduction of activity per angler during the recession, followed by an increase in activity per angler in the economic recovery, a scenario borne out by case study interviews and interviews with sector stakeholders.

[1] The Scottish Natural Heritage Study in 2010 on the economic impacts of nature based tourism in Scotland established that the visitor spend was £1.4b. This included sporting shooting and angling.

X2.3 While 27% of fishing providers thought fishing visitor numbers in Scotland would increase over the next five years, 30% thought they would decrease. The remainder thought they would be unchanged.

X3 Country Sports Provision

X3.1 Overall, 4,065 providers responded to the shooting sports survey, including 455 (or 11%) in Scotland. Additionally, 215 providers responded to the dedicated Scottish fisheries survey.

Shooting and Stalking

X3.2 All the shooting sports sites had been in use for at least five years, and the majority for over fifty.

X3.3 The shooting opportunities available, both formally and less formally, included live quarry shooting (88% of providers), clay pigeon shooting (33%), and target shooting (26%). The most widespread live quarry opportunities were driven and walked-up game apart from grouse (this includes duck shooting) and deer stalking (including red deer and other deer species).

X3.4 The opportunities were available on a limited number of days each year, with three quarters of providers open for fewer than sixty days. In some cases this is forced by game seasons. The providers generally expected to have fewer than ten participants for each day's shooting, with only ten per cent of providers saying they had more than twenty participants in a day.

X3.5 Many of the shooting and stalking providers made accommodation available, either on-site or in the local area.

X3.6 Shooting and stalking provider annual expenditure tended to be low, with 65% spending below £50K. On average, 34% of this expenditure was on staff costs, 10% was on capital items, and 57% was on other operational expenses.

X3.7 Shooting and stalking providers said they had a wide range of income, with an average of £51K per annum in 2012/13 and a maximum of £3M.

X3.8 Shooting and stalking providers were asked whether their income had risen or fallen over the past five years. Over half (56%) said their income remained roughly stable, while 37% said it was rising, through a combination of increased numbers and price rises, especially in the past two years, and only 6% said it had fallen. On balance this shows that the sector is growing, giving a basis for future optimism.

X3.9 Just over a third of shooting and stalking providers (38%) said shooting at their sites was self-supporting and broke even, while 12% said it was profitable and 22% said it was loss-making but financed by other activities.

X3.10 Many of the shooting and stalking providers claimed physical environmental and conservation benefits, as well as predator control. Some of the physical benefits were habitat management, planting of cover crops, and woodland creation and maintenance. Providers took part in environmental research and in bird surveys. Local community benefits included apprenticeships, skills training, and links with local educational establishments. Just over half said the presence of game and associated wildlife on their sites was itself a tourist attraction.

Fisheries

X3.11 Almost all the fishing sites offer river access, and over a third also provide access to lochs. Almost half provide accommodation, with a further 6% having space for camping or caravans. The facilities provided by fisheries included ghillies/guides, boats, tackle and bait supplies, and clothing.

X3.12 A large majority of fisheries offered salmon fishing, and just over two thirds offered sea trout.

X3.13 Fishing opportunities were available for more days a year on average than shooting and stalking activities with a third of businesses open for more than 200 days a year. Most fisheries (86%) said that they had 1-20 participating anglers a day when open.

X3.14 There was significant variation in the number of angler-days provided per site in 2013, with less than one hundred and a small minority of providers saying they had over 5000 angler-days. More than half of angler-days (56%) were due to overnight visitors.

X3.15 The majority of fishing providers (69%) made under £50K expenditure in 2013 in order to provide fishing opportunities. An estimated 80% of expenditure occurs locally (i.e., within 12–15 miles of the sites).

X3.16 About half the fishing providers (53%) said their fishing income had stayed roughly constant over the last five years. 40% said it had been rising, and only 7% said it had fallen. This indicates overall growth in the sector, in line with the wider Scottish economy in recent times.

X3.17 The trends over the last five years showed a slight overall rise in the numbers of anglers and of overnight visitors, although these increases are less marked than the increases reported in income.

X3.18 Providers had a slight tendency to think fishing in Scotland overall would decrease over the next five years.

X3.19 Providers identified threats to fishing in Scotland in the future, which included fish farming, netting, and predators reducing stock.

X3.20 Scotland's major competitor was seen to be Scandinavia, with the Republic of Ireland, England, and Russia also seen as significant competition by over a quarter of providers.

X3.21 Providers considered that Scotland's major advantages over these competitor countries included the landscape, scenery, conservation, tradition/heritage, greater privacy, exclusivity, low tourist numbers, proximity/accessibility to market, language, earlier and a longer season.

X3.22 However, the features where the competitors were perceived to have an advantage over Scotland included more fish (larger / more reliable catches), larger fish, better tourism board / marketing (e.g., Ireland), and a perceived lower impact of fish farming / netting together with value for money (in some cases).

X3.23 Fishing providers were also asked about their conservation activities. Most cited maintenance of river banks (86%) and wider riverside/lochside environments (62%). Just under half mentioned pest control (47%) and stock management (43%).

X3.24 Links between fishing providers and other organisations included conservation groups (62%), local community groups (59%), and educational bodies (41%). Over a third of fishing providers (37%) said they engaged in skills training for staff, and one in ten said they offered apprenticeships. Just over half the fishing providers said these benefits would definitely not occur without their fishing activity, and 29% said they probably would not.

X3.25 Most providers said they advertised through the Internet, specifically through their own website (68%), through booking websites (52%), and using social media (38%). Smaller numbers used angling magazines, non-angling magazines, and membership organisations. Providers said that "Repeat customers are by far the most important," and "Word of mouth is a great promotional tool."

X4 Characteristics of country sports tourists

Shooting and stalking tourists

X4.1 The national shooting and stalking tourists survey had 12,440 responses; 3,268 (26%) of these had participated in shooting or stalking in Scotland in 2012/13 (1,886 shot and 1,225 fished). Some 2600 of those who had shot in Scotland had spent the night there for shooting or fishing purposes. Some four hundred of visitors to Scotland lived overseas (many from Europe and North America).

X4.2 Those who visited Scotland to shoot were mainly from the English market (i.e., some 55%), including London and the South East. About a third lived in Scotland and stayed overnight when they went shooting. Some 15% were from overseas, many from Europe and North America.

X4.3 Almost all the shooting and stalking tourists shot at live quarry (94%). Two thirds also partook in clay pigeon shooting and one third in target shooting.

X4.4 The majority of shooting and stalking tourists spent over £1K in 2012/13. Almost one in five (19%) spent over £10k in total on shooting sports in 2012/13, with 3% saying they spent over £50K. Just over a third of this expenditure was on-site, and predominantly consisted of annual shoot subscriptions and per-day shooting fees.

X4.5 Almost all of the shooting and stalking tourists were male (96%). The majority (84%) were over 40, and 17% were retired.

X4.6 Shooting and stalking tourists were asked for their views on different aspects of shooting. They were overwhelmingly positive about the effects on the physical environments, conservation, and local communities who benefited from employment opportunities. There were also personal wellbeing benefits linked to the recreational benefits of fishing overall.

X4.7 Two-thirds of shooting and stalking providers attracted volunteers, mainly form the local area, to carry out work on site. One third of these carried out conservation work, and the average time they spent volunteering was 7 days per annum.

Fishing tourists

X4.8 The fishing tourist survey covered 2,134 participants, of whom 1,824 spent the night in Scotland for shooting or fishing purposes in 2013. Of these, 1,794 fished and 506 shot. 126 of the respondents lived overseas.

X4.9 In terms of residence, the pattern was similar to shooting, with some six in ten from England (with a fifth each from London and the South East and the North), almost one in three from Scotland, and almost one in ten from overseas (especially Europe and North America).

X4.10 The fishing tourists survey revealed a higher average number of trips/nights and more varied locations than the shooting and stalking tourists survey.

X4.11 Almost all the fishing tourists (94%) fished for salmon while they were in Scotland; just under half fished for sea trout (48%) and nearly as many for brown trout (39%).

X4.12 Fishing tourists were also asked what other activities apart from fishing they undertook while in Scotland. Just over half (52%) said they went sightseeing by car, and just under half said they watched birds or other wildlife (47%), went hiking or hill walking (45%), or visited castles and other historic sites (45%).

X4.13 The average expenditure of fishing tourists on trips in Scotland in 2013 was £4.7k. They were overwhelmingly male (98%). They were on average older, with 91% aged over 45. Almost a third of fishing tourists (29%) owned their own business or were self-employed. More than a third were retired (38%). The majority had a family income of over £50k, with 29% having a family income of over £100k. There was some concern that younger fishers were priced out.

X4.14 Fishing tourists were asked for their views of fishing in Scotland. The strongest aspects included the scenery and fresh air. The greatest concern was about the declining fish stocks.

X4.15 To assess the competition for Scotland, these fishing tourists were asked which other countries they had fished in in the previous five years. Nearly four fifths (79%) had fished in England, and a third (33%) had fished in Wales. Smaller numbers had fished in other countries especially Europe and N. America. Almost half the fishing tourists (46%) said Scotland was better than other countries they had fished in. About a third said it was equivalent and about a quarter thought it was less good.

X4.16 A significant number commented that they perceived Scottish fish stocks to be falling steeply, particularly for wild salmon and wild sea trout. This was often mentioned in conjunction with rising fees and diminishing value for money; many people mentioned the cost per fish caught as excessive and rising. Restrictions, for example mandatory catch and release and prohibitions on Sunday fishing, were unpopular.

X4.17 Fishing tourists were asked whether they were likely to return to Scotland in the next five years. 85% said they were very likely to return for a further fishing trip, and a further 11% thought this was quite likely. Almost three quarters said they were very or quite likely to return for a general holiday.

X4.18 They were also asked whether they were likely to fish in Scotland more in the future than in the past. 58% said they were very or quite likely to fish in Scotland more than they had been doing.

X5 Market Segmentation

X5.1 The survey results were disaggregated and analysed by group, for example, by number of nights spent in Scotland (ie. short and longer stays).

Shooting and fishing visits

X5.2 Those who lived in Scotland were more likely to go fishing for a single short stay or weekend visit, and visitors who came for the shortest stays were more likely to travel alone or with a single companion.

X5.3 Many tourists had fished in more than one Scottish region, with more than half in the Highlands. Those visiting for fewer than seven nights were less likely to stay in the Highlands. Visitors who lived in Scotland were more likely to have made multiple trips in the year and to have visited multiple regions.

X5.4 Fishing tourists who stayed for 1-3 nights were most satisfied with the range of fishing packages available.

X5.5 Those who came for more than thirty nights (the longest period) were most likely to rely on their own personal experience, advice from friends or club members, or information from sporting agents when making their plans compared to those staying for shorter periods. Those who were fishing for trout rather than salmon were significantly more likely to rely on their own personal experience, friends and club members and the Internet.

Activities

X5.6 Shooting tourists were likely to shoot more types of live quarry if they were on longer trips. However, those on longer trips were less likely than those on shorter trips to participate in clay pigeon shooting. Those who lived in Scotland and stayed overnight as part of their shooting trips were significantly more likely to take part in clay pigeon shooting and target shooting rather than live quarry shooting.

X5.7 Almost all the fishing tourists who came on fishing holidays fished for salmon. Those on the longest breaks were most likely to fish for salmon and sea trout. Those who lived in Scotland were less likely to fish for salmon and significantly more likely to fish for all other species.

Other activities

X5.8 Fishing tourists who came for longer stays (over thirty nights) were more likely to visit museums and art galleries as part of their trip. Visitors from abroad were the most likely to visit museums and art galleries and watch birds and other wildlife. Fishers who lived in Scotland were most likely to hike and hill-walk.

Demographics

X5.9 Fishing tourists aged between 45 and 54 tended to stay for fewer than seven nights, whereas those aged 65+ tended to stay for seven nights or longer. Visitors who lived in Scotland or abroad were notably younger than visitors from England. Broadly the same age pattern was shown by the shooting and stalking tourists. Fishing tourists who were employed tended to stay for less than seven nights, whereas the retired were more likely to stay longer.

Views on Scotland and Competing Locations Outside Scotland

X5.10 In terms of competing locations, those who fished for salmon in Scotland were much less likely to think they had got good value for money than those who fished for other fish such as trout mainly because of declining stocks. They were much less likely to think the fish stocks and the quality were good or very good. Salmon fishers were less likely to think the water quality was very good. They were also less likely to say they would return for a general holiday or to say they would visit more often in the future. The other locations fished in were mainly England, Wales, the Republic of Ireland, and North America.

X5.11 Those who stayed over thirty nights in Scotland were the least satisfied with value for money and customer care, but most satisfied with the range of fisheries. Scottish residents were significantly more satisfied with the range of fisheries, the variety of fish, the opportunities to meet other anglers, and air quality than visitors from other countries.

X6 Conclusions and Implications for Future Activity

X6.1 The results of the research show that shooting, stalking, and fishing make a significant contribution to the Scottish economy and the relevant Scottish regions and local economies.

The Scottish Market: Participants and their Characteristics

X6.2 Participants are attracted to Scotland from a wide range of geographical markets for shooting and fishing. The main market is England (with six in ten visitors), especially the North of England and London and the South East. The Scottish market accounts for just under one in three participants. The other main markets are Europe, especially Western Europe including Scandinavia, and North America.

X6.3 The main size of each group that participates is between three and five people. Shooting and fishing participants were overwhelmingly male, who accounted for over nine out of ten visitors. The market comprises participants who tend to be middle aged and between 40 and 60 years of age, with the fishing participants being older than the shooting visitors. In terms of economic status, there is a fairly even mix of those who are working and employed, people who are self-employed or have their own businesses, and the retired (i.e., almost a third in each group).

X6.4 The range of expenditure for shooting and stalking varies widely with between £1K and £9K being the main range of expenditure in 2012/13 for all visitors. The average length of stay varied widely with those who were fishing tending to stay for longer periods compared to those shooting. Around half the participants stayed in hotels and a quarter in guest houses.

The Shooting and Fishing Products

X6.5 Both shooting and fishing provision, and the products, are well established in Scotland and provide a variety of opportunities for the participants over the year reflecting the different “seasons” for the different sports. The providers have existed successfully for many years, and there has been diversification to provide, for example, accommodation and alert visitors to other activities in Scotland, mainly associated with the outdoors. A key influence over the past five years or so has been the credit crunch and the recessionary phase (now improving).

X6.6 On the shooting activity, almost all participants were engaged in live quarry shooting. Two thirds are attracted by clay pigeon shooting and a third by target shooting. Those who went shooting were attracted by the scenery and the environment (seen by participants as both healthy and attractive), the conservation activities, the sense of being part of the local social fabric, and the "Scottish experience". The fishing participants are engaged primarily in salmon and sea and brown trout fishing. The facilities also include a wide number of fisheries, the ghillies, accommodation (mainly off site), boat hire opportunities, fishing tackle, and bait.

X6.7 Those who went fishing were attracted by the scenery, the environment of the beats, the fresh air, and the overall recreational experience.

X6.8 The other activities that the fishing participants engaged in, as part of the product offer, were golf, hiking and hill walking, and visiting castles, other historic sites, museums, and galleries.

X6.9 The providers also considered that part of the product offer was the tradition and heritage of fishing and the locations, in Scotland the privacy and exclusivity (away from other tourists).

Future Growth: Opportunities and Weaknesses

X6.10 The research indicates, based on the views of the providers, that activity in Scotland has by and large stayed the same for the majority of providers over the past five years, although the picture is mixed. This applies to both the shooting and the fishing providers.

X6.11 In terms of future growth the shooting stakeholders and providers were uncertain of prospects, although they were of the general view that the sector would see growth in the number of participants over the next five years, reflecting both UK and overseas demand. The fishing providers considered there would be an increase overall and for overnight visitors in Scotland for just over a quarter (with slightly more who said their own fishing activity would see an increase). Some four in ten thought activity would remain the same.

X6.12 There were some key influences at work and scenarios which it was thought would influence future activity in both shooting and fishing. The future stabilisation and growth of the economy was important, with greater uncertainty in Europe. Generally the higher ends of the shooting and fishing markets were likely to be less subjected to economic uncertainties compared to the middle and lower ranges.

X6.13 Irrespective of the economic context, activity and incomes will be influenced by the quality of the Scottish product and offering and the response of competitors. In terms of shooting, some of the weaknesses that could be addressed for stakeholders and providers include dealing with the regulatory environment on the stock of quarry, conservation and rural access, the technology and bookings and management, and the general impacts of rising costs. For fishing, the key disadvantages highlighted were the decline and vulnerability of fish stocks, the quality and variety of fish, value for money, and the impact of regulations.

X6.14 The fish stocks in particular were adversely impacted upon by netting in rivers and at sea and by aquaculture, lice, and seals.

X6.15 The fishing participants fish in other locations in England, Wales, North America, Scandinavia, and Eastern Europe. While some one in six said they would increase their fishing activity in Scotland, four in ten said it was not likely, and a quarter thought it was not likely that they would return to Scotland to fish.

X6.16 Within a context where some future growth is anticipated, when offset by those providers who saw a decline, these factors on the quality of the fishing experience and the competition have important implications for the Scottish market in future.