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

Final Report

A report prepared by

PACEC

on behalf of

Scottish Country Sports Tourism Group

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Executive Summary

X1 Introduction

X1.1 The overall aims of the report were to characterise the nature of shooting and sporting activities, the attitudes of providers and participants, and the volume and value for Scotland as well as economic impact. The report also draws some conclusions on the markets, the products, and potential future growth.

X1.2 This report uses the results of four surveys carried out in 2012/2013 to characterise country sports in Scotland, including activities, participation, and trends. It assesses Scotland's strengths, weaknesses, opportunities and threats as a destination for country sports tourism, and analyses and quantifies the volume and value of tourism, as well as the potential for 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 slightly different in the surveys, which means not all the results can be compared directly.

X2 The Nature of Country Sports Provision

X2.1 Overall, 4,065 providers responded to the shooting sports survey, including 460 in Scotland. Additionally, 215 providers responded to the dedicated Scottish fisheries survey resulting in a total of 675 respondents

Shooting and Stalking

X2.2 All the shooting sports sites had been in use for at least five years, and the majority for over fifty. However, the businesses are not always continuous, and just over ten per cent of operations said they had been in business for less than five years.

X2.3 The shooting and stalking activities offered covered a wide range of opportunities, including 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 (including ducks) and deer stalking.

X2.4 Shooting and stalking providers opened on a limited number of days in the year, with three quarters of providers open for fewer than sixty days. In some cases this is forced by game seasons. The majority of shooting and stalking providers expected to have fewer than ten participants in each day's shooting, with only ten per cent of providers saying they would cater to more than twenty participants in a day.

X2.5 Many of the shooting and stalking providers (some 62%) provided or gave rise to overnight stays, either on-site or in other local accommodation.

X2.6 Shooting and stalking provider expenditure tended to be low, with 65% reporting annual expenditure below £50K. On average, 34% of this expenditure was on staff costs, 10% was on capital, and 57% was on other operational expenses.

X2.7 Shooting and stalking providers reported a wide range of income from shooting and stalking, with an average of £51K and a maximum of £3M.

X2.8 Shooting and stalking providers were asked about their income over the previous five years, and in particular whether their income had risen or fallen in this time. Over half the providers (56%) reported their income remaining roughly stable over the past five years, while 37% said it was rising and only 6% said it was falling. On balance this shows that the sector is growing, and contributes towards optimism.

X2.9 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.

X2.10 Many of the shooting and stalking providers cited conservation benefits. Providers took part in 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, independently of the activities provided.

Fisheries

X2.11 Almost all the fishing sites offer river access, and over a third also offer 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, boat, tackle and bait supplies, and clothing.

X2.12 A large majority of fisheries offered salmon fishing, and just over two thirds offered sea trout.

X2.13 Fishing providers opened for more days a year on average than shooting and stalking providers did, with a third of businesses open for more than 200 days a year. Most fisheries (86%) reported that they had 1-20 participating anglers a day when open.

X2.14 There was significant variation in the number of angler-days provided per site in 2013, with 4% of providers reporting over 5000 angler-days. More than half of angler-days (56%) were due to overnight visitors.

X2.15 The majority of fishing providers (69%) reported 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 site).

X2.16 About half the fishing providers (53%) said their fishery-related 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 economy.

X2.17 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.

X2.18 Providers had a slight tendency to think fishing in Scotland overall would decrease over the next five years, but tended to think their own businesses would improve.

X2.19 Providers identified threats to fishing in Scotland in the future, which included fish farming and predators.

X2.20 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.

X2.21 Providers considered that Scotland's major competitive advantages over these competitor countries included:–

- Landscape, scenery, conservation;
- Tradition/heritage;
- Privacy, exclusivity, low tourist numbers;
- Proximity/accessibility to market, language;
- Earlier and longer season.

X2.22 However, the areas where the competitors were perceived to have a competitive advantage over Scotland included:–

- More fish (larger / more reliable catch);
- Larger fish;
- Tourism board / marketing (Ireland);
- Perceived lower impact of fish farming / netting;
- Value (in some cases).

X2.23 Fishing providers were also asked about their conservation activities at the site. Most cited maintenance of river banks (86%) and wider riverside/lochside environments (62%). Just under half mentioned pest control (47%) and stock management (43%).

X2.24 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, 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.

X2.25 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 commented that "Repeat customers are by far the most important," and "Word of mouth is a great promotional tool."

X2.26 The conservation and wildlife habitat management attracted other visitors. In combination the activities provided a Scottish "experience" for visitors and tourists.

X3 Characteristics of country sports tourists

Shooting and stalking tourists

X3.1 The shooting and stalking tourists survey had 12,440 responses; 3,268 of these had participated in shooting or fishing in Scotland in 2012/2013 (1,886 shot and 1,225 fished). During 2012/2013, 2,589 of those who had shot in Scotland had spent the night there for shooting or fishing purposes. 77 of the visitors to Scotland for country sports purposes lived overseas.

X3.2 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.

X3.3 In terms of fishing, the pattern was similar, 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).

X3.4 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.

X3.5 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.

X3.6 Almost all of the shooting and stalking tourists were male (96%). The majority (84%) were over 40, and 17% were retired.

X3.7 Shooting and stalking tourists were asked for their views on shooting. Views were overwhelmingly positive about the effects on environments, conservation, and local communities, as well as on personal wellbeing.

X3.8 Two-thirds of shooting and stalking tourists volunteered to carry out work related to shooting sports in 2012/13. One third of these did conservation work, and the average time they spent volunteering was 7 days.

Fishing tourists

X3.9 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.

X3.10 The fishing tourists survey revealed a higher average number of trips/nights and more varied locations than the shooting and stalking tourists survey.

X3.11 Fishing tourists were slightly more likely than shooting/stalking tourists to stay in hotels, and slightly less likely to stay at home.

X3.12 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%).

X3.13 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%).

X3.14 The average expenditure of fishing tourists on trips in Scotland in 2013 was £4.7k.

X3.15 Fishing tourists were also 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.

X3.16 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 fish stocks.

X3.17 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.

X3.18 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.

X3.19 A significant number commented that they perceived Scottish fish stocks to be falling steeply, particularly stocks of 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.

X3.20 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. Several said they were less likely to return if Scotland voted for independence.

X3.21 Fishing tourists 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.

X4 Market Segmentation

X4.1 The survey results were disaggregated and analysed by group, for example, by number of nights spent in Scotland.

Shooting and fishing visits

X4.2 Fishing tourists 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.

X4.3 Fishing tourists who lived in Scotland were significantly more likely to fish for other species, including rainbow trout, brown trout, and sea trout.

X4.4 Many tourists had fished in more than one region, with more than half including 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.

X4.5 Visitors who were fishing tended to have made more trips to Scotland in 2013 (average 6.7) than visitors who shot (average 4.4). This effect was particularly strong for visitors who lived in Scotland.

X4.6 The shooting and stalking survey showed that those who stayed in Scotland for shooting or fishing were more likely to stay with friends and less likely to stay in a hotel if they stayed for more than thirty nights overall.

X4.7 Longer-staying or more frequent shooting and stalking visitors were more likely to travel to Scotland by car. Visitors who came from further afield were more likely to fly, whereas those who lived in Scotland or the North of England or Midlands were more likely to drive.

X4.8 Fishing tourists who stayed for 1-3 nights were most satisfied with the range of packages available.

X4.9 Those who came for more than thirty nights overall 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. Those who were fishing for trout rather than salmon were significantly more likely to rely on their own personal experience, friends and club members, the Internet, and advice from people in the place they visited.

Activities

X4.10 Shooting and stalking 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.

X4.11 Visitors who lived in Scotland were significantly more likely to take part in clay pigeon shooting and target shooting rather than live quarry shooting.

X4.12 Almost all the fishing tourists who came on fishing holidays fished for salmon. Those on the shortest breaks were most likely to fish for rainbow trout and grayling, and 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

X4.13 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

X4.14 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.

X4.15 Fishers with family incomes over £100K were more likely to fish for salmon and less likely to fish for other fish.

Views on Scotland and Competing Locations

X4.16 Fishing tourists who fished for salmon were much less likely to think they had got very good value for money than tourists who fished for other fish. They were also much less likely to think the fish stocks were good or very good and that the quality of fish was good or very good. Salmon fishers were less likely to think the water quality was very good and were also less happy with the air quality and other available attractions. They were also less likely to say they would return for a general holiday and less likely to say they would visit more often in the future.

X4.17 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.

X4.18 Those who stayed for three nights or fewer were slightly less likely to say they would return to Scotland in the next five years for a further fishing trip. Scottish residents were most likely to say they would return, and visitors from abroad were least likely to.

X5 Volume and value of country sports tourism

X5.1 A total of 910,000 visitor nights were spent in Scotland in 2013 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*

Source: PACEC

X5.2 37% of shooting and stalking providers, and 38% of fisheries, stated that their income had risen over the past five 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 economic recovery, a scenario borne out by case study interviews and interviews with stakeholders.

X5.3 While 27% of fishing providers thought fishing visitor numbers in Scotland would increase over the next five years, 30% thought they would decrease. Providers were more optimistic about the prospects of their own businesses – 30% thought their visitor numbers would increase, 24% thought they would decrease.

X6 Economic impacts

X6.1 Employment in Scottish country sports is highly seasonal, as the availability of most live quarry shooting and game fishing is restricted by law to fixed seasons. A consistent way of measuring employment throughout the year is to estimate full-time equivalent employees (FTEs) – for example, one employee working full-time for 6 months of the year counts as 0.5 FTEs.

X6.2 4,400 paid FTEs are supported by the expenditure of visitors on country sports in Scotland. 2,600 of these are in shooting and stalking, and 1,800 in fishing.

X6.3 The direct Gross Value Added (GVA) attributable to the country sports activities of overnight visitors to Scotland is £50 million, with £21 million generated by shooting and stalking and £29 million generated by fishing. Further GVA is supported in the Scottish economy by the local supply chain to the shooting, stalking and fishing providers. This was not quantified by the study, but the country sports providers did reported that the majority of their expenditure takes place locally (i.e. within 10-15 miles of the country sports site).

X7 Conclusions and Implications for Future Activity

X7.1 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

X7.2 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.

X7.3 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).

X7.4 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.

X7.5 The main form of travel for shooting or fishing was by car or van (reflecting those who travel from the Scottish and English markets). Some one in six also flew or arrived by boat or ferry.

The Shooting and Fishing Products

X7.6 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).

X7.7 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.

X7.8 Those who went fishing were attracted by the scenery, the environment of the beats, the fresh air, and the overall recreational experience.

X7.9 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.

X7.10 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

X7.11 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.

X7.12 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.

X7.13 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.

X7.14 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.

X7.15 The fish stocks in particular were adversely impacted upon by netting in rivers and at sea and by aquaculture, lice, and seals.

X7.16 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.

X7.17 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.

1 Introduction and project aims

1.1 Introduction

1.1.1 In August 2013 the Scottish Country Sports Tourism Group (SCSTG), Scottish Enterprise (SE) and the Scottish Natural Heritage appointed PACEC to carry out a review of the benefits of country sports tourism and its volume and value in Scotland. The focus was on shooting and stalking activities and fishing (excluding sea angling). The research was carried out in conjunction with a study on the benefits of shooting sports in the UK for the British Association for Shooting and Conservation (BASC) and its partners and deployed a similar methodology.

1.1.2 The project aims were to:–

- Gather information and characterise the country sports activities, participation, and trends in Scotland
- Assess the perceptions and attitudes of the providers of shooting and fishing opportunities and the tourists as participants.
- Assess Scotland’s strengths and weaknesses as a destination for country sports tourism; and
- Analyse and quantify the volume and value of tourism, and the potential for growth in terms of the economic and GVA impact
- Develop a performance measurement framework for the future.

1.1.3 Related aims were to draw out some broad conclusions on the nature of the Scottish market (participants and activities), the shooting and fishing products (opportunities and strengths), the policy implications and potential future growth (opportunities and weaknesses) based on the evidence from the research.

1.1.4 Where possible, subject to data availability, the results are disaggregated for the broad regions in Scotland.

1.2 Background

1.2.1 The project sought to update and refine the results of previous research carried out in Scotland. The Scottish Executive commissioned an economic analysis of game and coarse angling in Scotland in 2004[1]. This estimated that freshwater angling in Scotland supported around 2,800 jobs and increased the Scottish economy by over £100M.

1.2.2 The Country Sports Tourism Group also produced a report in 2004[2] which looked at visitors who stayed at least one night in Scotland and participated in country sports. This identified value for money as an issue and recommended increasing quality, as

[1] The Economic Impact of Game and Coarse Angling in Scotland. Scottish Executive, 2004.
[2] Country Sports Tourism in Scotland. Country Sports Tourism Group, 2004.

decreasing prices was not considered feasible. Other issues included the ageing profile of participants and the lack of available information about opportunities.

1.2.3 The other research on tourism in Scotland did not disaggregate the results for the shooting and fishery sectors.

1.3 Methodology

1.3.1 PACEC worked with SCSTG, BASC and partners to design and develop the overall methodology for the project, the key stakeholders to liaise with, the construction of the sampling frames for the survey research and the scope and number of questionnaires to be used.

1.3.2 The main body of the research consisted of surveys of participants in country sports and of providers of country sports opportunities. The questionnaires were similar in many respects. However, there were some differences as there were two different Steering Groups for the BASC and SCSTG studies.

1.3.3 A UK-wide study of shooting sports providers and participants was undertaken in 2012–2013. This covered the period August 2012 to July 2013 in order to include a complete shooting season for live quarry.

1.3.4 Shooting sports were defined as target shooting, clay pigeon shooting, and the legal shooting of birds or animals which someone pays to be able to do, or for which payment is waived – they do not include activities for which someone receives payment (e.g. commercial pest control is not shooting sport). Fishing activity took place on the Scottish rivers primarily for salmon and trout (sea and brown trout)

1.3.5 Shooting sports providers are organisations (with employees and/or members) and/or individuals (who are not part of any organisation) who perform services (either paid or voluntary) which give rise to opportunities for shooting sports. Where several organisations are involved we classify one as the provider and others as suppliers or sub-contractors. Potential suppliers include: agencies (sales), marketing, catering, entertainment, accommodation, shooting training, land management service, reared game (for release), pest control service, sale of or provision of shooting rights.

1.3.6 Participants are those who take part in shooting sports, and either pay to do so, or do so for nothing (but they are not paid to do so). Many providers are also, therefore, participants.

1.3.7 Invitations for the shooting survey were issued via membership organisations representing a broad spread of shooting interests – shoots, landowners, gamekeepers, etc. Additional general invitations were made via press and social media. The survey covered shooting sports in the UK as a whole, and included specific sections on shooting and fishing trips/overnight stays in Scotland. 16,200 responses were received. Of these, the 2,589 who spent at least one night in

Scotland for shooting or fishing are included in this report, as well as 460 shooting providers in Scotland.

1.3.8 The surveys were chiefly delivered online, with paper copies available on request. Each of the surveys had two sections: a quick section, with key questions and multiple choice/banded answers, to maximise the response rate, and a more detailed section including breakdowns of quantitative results and open qualitative questions. This approach means that averages from the detailed responses can be used to make estimates for those who only completed the quick section.

1.3.9 Dedicated surveys for Scottish fishery providers and participants were also carried out in 2014. The participants in the Scottish fishing surveys were alerted to the opportunities via the key organisations, for example, the Association of Salmon Fishery Boards (working with individual fishery boards), SCSTG, the Salmon and Trout Association, and Fishpal. Some 215 providers responded, as well as some 1824 who mainly fished in Scotland (some of these also went shooting).

1.3.10 These surveys resulted in databases of information which were analysed using SPSS and Excel; data was disaggregated by length of visitor stay and other variables to allow modelling of expenditure by type of angling.

1.3.11 A small number of case studies were also carried out, to provide more detailed illustrations of the country sports sector.

1.4 Structure of the Report

1.4.1 Following this introduction Chapter 2 outlines the nature of country sports provision i.e. shooting and fishing. Chapter 3 sets out the characteristics of the country sports tourists for shooting and fishing. Chapter 4 shows some of the main market segments for participants. Chapter 5 provides the estimates of volume and value. Chapter 6 sets out the economic impacts and the final chapter 7 draws out the main conclusions and some of the broad policy implications for the sector.

1.4.2 Appendix A shows the main topics used in the surveys. Appendix B provides the four case studies on shooting and fishing.

2 The Nature of Country Sports Provision

2.1 Introduction

2.1.1 This chapter draws on the evidence generated by the surveys of the sporting opportunities providers (i.e. shooting and fishing). It assesses:

- The characteristics of providers
- The main activities of providers and participants
- Expenditure by providers
- The benefits for providers
- The additional benefits such as conservation

For the fishing sector, centres of competition were identified that could influence activity in Scotland in the future as well as the advantages and disadvantages of the Scottish offer. Additional benefits are also examined, such as land management and conservation and skills for employees.

2.1.2 Overall, 4,065 providers responded to the shooting sports survey, including 460 in Scotland. Additionally, 215 providers responded to the dedicated Scottish fisheries survey.

2.1.3 While the shooting and fishing providers focussed on their core products, there had been diversification reflecting circumstances and tastes, especially to offer accommodation and alert visitors to other activities in Scotland, mainly associated with the outdoors.

2.1.4 The packaging of provision created a Scottish “experience” for visitors. The offer was reinforced by the conservation and habitat management activities which helped to attract additional visitors and tourists.

2.2 Shooting and Stalking Providers

2.2.1 This section focuses on those shooting and stalking providers who said that their business generated overnight visits from participants who travelled to their sites, and on the Scottish fisheries.

2.2.2 A shooting sports site is a definable area of land (or a building, in the case of an indoor shooting range) over or in which shooting sport takes place. Many sites offer a range of distinct shooting opportunities. Table 2.1 below shows the shooting disciplines and quarries offered by all shooting providers in Scotland, cross-tabulated by the number of visitor nights which the provider estimated were associated with their activity (whether on-site or in other local accommodation). Focusing only on those providers giving rise to visitor nights, the shooting and stalking activities offered covered a wide range of opportunities, including 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 ducks) and deer stalking (other than red deer). Minority game provision included wild boar, wild goat, and coastal wildfowling.

Table 2.1 Shooting and stalking providers: shooting sports opportunities available during 2012/13

	Percentages of all respondents (by number of visitor nights)						
	Total	None	Any	1 to 19	20 to 49	50 to 249	250+ to 999
Avian pest/predator control (e.g. pigeon)	45	42	54	41	**67**	58	47
Mammalian pest/predator control (e.g. foxes)	38	36	47	29	**62**	46	47
Driven grouse	15	**12**	**23**	12	14	**29**	**37**
Walked-up grouse	26	**23**	**38**	18	24	**54**	**53**
Other driven game (including duck)	56	**53**	**67**	47	**86**	71	58
Other walked-up game (including duck)	46	**42**	**58**	24	**67**	**67**	**68**
Coastal wildfowling	6	6	9	6	14	4	11
Inland duck (e.g. flight ponds / marshes) and goose shooting	39	38	42	29	**71**	42	21
Deer stalking (red deer)	36	**33**	**46**	**0**	43	**58**	**74**
Deer stalking (other deer species)	58	57	62	35	71	71	63
Wild boar	1	1	1	0	5	0	0
Wild goat	4	**3**	**9**	6	0	4	26
Air gun shooting of live quarry	5	6	2	12	0	0	0
Any live quarry	84	82	88	**65**	**100**	96	84
Collecting firearms (including antiques)	3	4	2	6	5	0	0
Clay pigeon shooting	32	32	33	24	38	33	37
Target shooting: air gun	12	13	10	24	0	13	5
Target shooting: black powder	6	6	5	**18**	0	4	0
Target shooting: small bore	16	15	17	**35**	10	13	16
Target shooting: full bore (including rifle)	13	13	14	24	5	8	21
Any target shooting	25	25	26	41	10	25	32
None of the above	0	0	0	0	0	0	0

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey of Providers and participants, 2013 (q10)

2.2.3 Table 2.1 shows that providers giving rise to visitor nights were particularly associated with red deer stalking and game shooting (driven or walked-up), and that providers associated with large numbers of visitor nights were significantly more likely to offer red deer stalking, grouse shooting, and walked-up lowland game.

2.2.4 The remainder of this section gives results only for providers which gave rise to visitor nights.

2.2.5 Shooting is a well established sport in Scotland. For 69% of shooting sports providers consulted, shooting has taken place on the current site where they operate for over 50 years. No providers reported fewer than five years of shooting on their site. However, the businesses are not always continuous, and new ones are emerging, with 11% of operations interviewed saying they had been in business for less than five years.

Table 2.2 Shooting and stalking providers: Length of operation

	Percentages of all respondents	
	On this site	This business
<5 years	0	11
5-19 years	21	44
20-49 years	10	19
50+ years	69	26

Source: PACEC Survey of Providers and participants, 2013 (Q116)

Activities of providers and participants

2.2.6 Shooting and stalking providers opened on a limited number of days in the year, with three quarters of providers open for fewer than sixty days. In some cases this is forced by game seasons. The number of days is a record of the time spent on and around the site, including all the social aspects, for shooting sports. Some or all of a morning is half a day. Some or all of an afternoon or evening is half a day. Most formal shoots would therefore count in units of one day. Much wildfowling, informal shooting (including pest control), clay pigeon, and target shooting would be counted in units of half days.

Table 2.3 Shooting and stalking providers: Days Shooting in 2012/13

	Percentages of all respondents
	Total
1-9	20
10-19	25
20-39	16
40-59	14
60 or more	26

Source: PACEC Survey of Providers and participants, 2013 (q11)

2.2.7 The majority of shooting and stalking providers expected to have fewer than ten participants in each day's shooting, with only ten per cent of providers saying they would cater to more than twenty participants in a day.

Table 2.4 Shooting and stalking providers: Shooting Participants on each Shooting Day

	Percentages of all respondents
	Total
1	4
2-4	15
5-9	56
10-19	15
20 or more	10

Source: PACEC Survey of Providers and participants, 2013 (q12)

2.2.8 Many of the shooting and stalking providers (some 62% of those interviewed) provided or gave rise to overnight stays, either on-site or in other local accommodation. These are shown in Table 2.5.

Table 2.5 Shooting and stalking providers: Number of visitor nights provided

	Percentages of all respondents
	Total
None	38
1 to 9	9
10 to 19	11
20 to 49	16
50 to 99	6
100 to 249	9
250 to 999	7
Over 1,000	4

Source: PACEC Survey of Providers and participants, 2013 (q78)

Expenditure of providers

2.2.9 Shooting and stalking provider expenditure tended to be low, with 65% reporting annual expenditure below £50K. On average, 34% of this expenditure was on staff costs, 10% was on capital, and 57% was on other operational expenses. Employment costs include wages and employers' National Insurance and pension contributions, and the costs of any other benefits (e.g. health care).

Table 2.6 Shooting and stalking providers: Expenditure

	Percentages of all respondents
	Total
£0-99	2
£100-999	4
£1k-9k	27
£10k-49k	32
£50k or more	35

Source: PACEC Survey of Providers and participants, 2013 (q16)

The Benefits of Provision

2.2.10 Many of the shooting and stalking providers cited conservation benefits arising from the sporting activities on their site. Just over half (54%) of the sites contain land with a conservation designation (such as SSSI); just under half (45%) belong to a biodiversity advisory group, and 35% participated in research, while 45% said they undertook bird surveys, including for the RSPB and SNH. Almost four fifths of shooting and stalking providers (79%) said pest/predator control would need to take place on their sites in the absence of shooting sports activities (for example, for crop protection or conservation).

2.2.11 Local community benefits were also attested. Almost a quarter (24%) provide apprenticeships, and 41% provide other informal or on-the-job training, increasing the local skills base. Just under a third (31%) had links with local educational establishments or provided school visits to their sites. In addition, the use of accommodation, hospitality, and other services in the local region by visiting shooters safeguards local employment.

2.2.12 Just over half the providers (52%) said the presence of game and associated wildlife on their sites was itself a tourist attraction, independently of the activities provided, and created a wider interest for Scottish residents and tourists from elsewhere.

2.3 Fishing Providers

Activities of providers and participants

2.3.1 Almost all the fishing sites (93%) offer river access, and over a third (37%) also offer access to lochs. Almost half (44%) provide full- or part-board accommodation on-site, with a further 6% having space for camping or caravans. The services and facilities provided by fisheries included ghillies/guides (58%), boat hire (25%), tackle and bait supplies (20%), and clothing (6%).

Table 2.7 Fishing providers: Facilities On Site

	Percentages of all respondents
	Total
River access	93
Loch access	37
Ghillies/guides	58
Fishing tackle/bait supplies	20
Clothing	6
Boat hire	25
Accommodation (full/part board)	44
Camping/caravans	6
Other (please specify below)	11

Source: PACEC Survey of Scottish Fishing providers (Q10)

2.3.2 The majority of fisheries (88%) offered salmon fishing, and just over two thirds offered sea trout.

Table 2.8 Fishing providers: Fish Stocked during 2013

	Percentages of all respondents
	Total
Salmon	88
Sea Trout	68
Brown Trout	47
Grayling	7
Rainbow Trout	9
Coarse Fishing (Pike etc.)	5

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey of Scottish Fishing providers (Q12)

2.3.3 Fishing providers opened for more days a year on average than shooting and stalking providers did, with a third of businesses open for more than 200 days a year. The breakdown of fishing days provided in 2013 is shown in Table 2.9.

Table 2.9 Fishing providers: Fishing Days in 2013

	Percentages of all respondents
	Total
1–50	11
51–100	15
101–150	20
151–200	22
200+	32

Source: PACEC Survey of Scottish Fishing providers (Q13)

2.3.4 Most fisheries (86%) reported that they had 1-20 participating anglers a day when open.

Table 1.1 Fishing providers: Anglers on each Fishing Day

	Percentages of all respondents
	Total
1–20	86
21–40	6
41–60	2
80 or more	6

Source: PACEC Survey of Scottish Fishing providers (Q14)

2.3.5 There was significant variation in the number of angler-days provided per site in 2013, with 6% of providers reporting over 5000 angler-days. More than half of angler-days were due to overnight visitors – 63% was the average among all fisheries (weighting each equally), but the day-weighted average was slightly lower, at 56%.

Table 2.10 Fishing providers: Angler-Days in 2013

	Percentages of all respondents
	Total
1 to 9	4
10 to 19	3
20 to 49	2
50 to 99	7
100 to 199	16
200 to 499	22
500 to 999	19
1000 to 2499	16
2500 to 4999	4
5000+	6

Source: PACEC Survey of Scottish Fishing providers (Q15)

Expenditure of providers

2.3.6 The majority of fishing providers (69%) reported under £50K expenditure in 2013 in order to provide fishing opportunities, covering all costs including VAT. The overall breakdown of providers is shown in Table 2.11.

Table 2.11 Fishing providers: Expenditure in 2013 to Provide Fishing Opportunities

	Percentages of all respondents
	Total
£0–50K	69
£51–100K	18
£101–150K	3
£151-200K	1
£200K or more	9

Source: PACEC Survey of Scottish Fishing providers (Q25)

2.3.7 An estimated 80% of expenditure occurs locally (i.e., within 12–15 miles of the site).

Competition

2.3.8 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.

Table 2.12 Fishing providers: Scotland's Main Competitors

	Percentages of all respondents
	Total
England	29
Wales	16
Northern Ireland	18
Republic of Ireland	37
Scandinavia	58
Rest of Western Europe	8
Eastern Europe	24
North America	15
Russia*	27
Iceland*	16
Elsewhere	27

Respondents could select more than one option; so percentages in any column may sum to more than 100
* denotes write-in answer – this is significant because these responses were unprompted
Source: PACEC Survey of Scottish Fishing providers (Q38)

2.3.9 Providers considered that Scotland's major competitive advantages over these competitor countries included:–

- Landscape, scenery, conservation;
- Tradition/heritage;
- Privacy, exclusivity, low tourist numbers;
- Proximity/accessibility to market, language;
- Earlier and longer season.

2.3.10 The combination of these helped to define the "Scottish experience".

2.3.11 However, the areas where the competitors were perceived to have a competitive advantage over Scotland included:–

- More fish (larger / more reliable catch);
- Larger fish;
- Tourism board / marketing (for example in Ireland);
- Perceived lower impact of fish farming / netting;
- Value (in some cases).

2.3.12 The notion of value was primarily defined by the providers as the larger numbers of fish to catch elsewhere and the larger fish. While the attractiveness of Scotland is recognised, visitors travel to catch fish as an important part of their trip. Where this is potentially not so easy the issue of value is raised. Given the range of opportunities in Scotland and the different rates the providers did not make detailed price comparisons.

2.3.13 When prompted, the key comparative advantages providers saw for Scotland were the scenery, the ease of travel, and the skills of ghillies who provided a valuable service and support. The other main advantages were the water quality for the fish, the range of fisheries and the air quality enjoyed by the anglers. (Numbers shown below are for those who identified an advantage for Scotland against those who did not, respectively.)

Table 2.13 Fishing providers: Key Advantages

	Advantage	Disadvantage
Scenery	39	1
Ghillies	36	1
Ease of travel	37	3
Fresh air	32	1
Water quality	32	3
Meeting anglers	29	1
Range of fisheries	32	7
Overall recreation	26	4
Accommodation	29	7
Other attractions	21	2

Source: PACEC Survey of Scottish Fishing providers

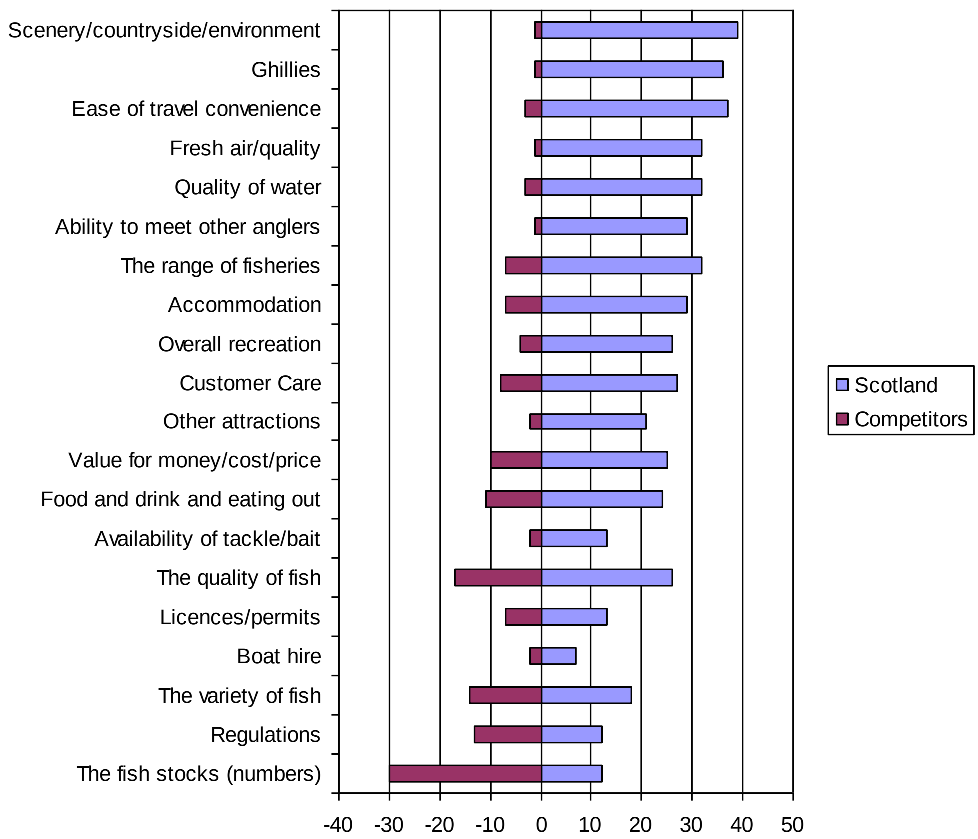
2.3.14 The key comparative disadvantages, related to international competitors, were fish stocks available. Other disadvantages were the inferior quality of fish, the variety of fish and the regulation that providers faced. The numbers show those providers who did not see a disadvantage against those who did.

Table 2.14 Fishing providers: Key Disadvantages

	Advantage	Disadvantage
Fish stocks (numbers)	12	30
Regulations	12	13
Variety of fish	18	14
Boat hire	7	2
Licence / permits	13	7
Quality of fish	26	17
Availability of tackle / bait	13	2
Food and drink	24	11
Value for money	25	10
Customer care	27	8

Source: PACEC Survey of Scottish Fishing providers

Figure 2.1 Fishing providers: Scotland's Comparative Advantage



Source: PACEC Survey of Scottish Fishing Providers (Q69). The balance of advantages (+) and disadvantages (-).

Additional Benefits of Fishing

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

Table 2.15 Fishing providers: Land Management and Conservation Measures

	Percentages of all respondents
	Total
Restocking/protection of stocks	43
Maintain banks of rivers, lochs, and streams	86
Manage water pollution	33
Maintain wider riverside/loch area/environment	62
Manage heather moorland	17
Pest control (to protect fish and habitats)	47
Other (Please specify below)	14
None of the above	6

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey of Scottish Fishing providers (Q23)

2.3.16 Links between fishing providers and other organisations included conservation groups (62%), local community groups (59%), and educational bodies (41%).

Table 2.16 Fishing providers: Skills Benefits

	Percentages of all respondents
	Total
Apprenticeships	10
Skills training	37
Links with educational bodies	41
Links with training organisations	31
Links with local community groups	59
Links with conservation group	62

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey of Scottish Fishing providers (Q30)

2.3.17 Over a third of fishing providers (37%) said they engaged in skills training, and one in ten said they offered apprenticeships.

2.3.18 Providers were asked to what extent they thought the jobs and benefits they had described above would have occurred anyway if they did not provide fishing opportunities at the site(s). Just over half the fishing providers (54%) said the above benefits would definitely not occur without their fishing activity, and 29% said they probably would not.

Table 2.17 Fishing providers: Benefits Maintained Without Fishing

	Percentages of all respondents
	Total
Definitely	6
Probably	4
Possibly	6
Probably not	29
Definitely not	54

Source: PACEC Survey of Scottish Fishing providers (Q31)

2.3.19 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 commented that “Repeat customers are by far the most important,” and “Word of mouth is a great promotional tool.”

Table 2.18 Fishing providers: Marketing

	Percentages of all respondents
	Total
Angling magazines	32
Non-angling magazines	12
Social media	38
Website	68
Membership associations	26
Booking websites	52
Brochures	18
Trade shows	4
Sporting Agent	22

Source: PACEC Survey of Scottish Fishing providers (Q31)

2.3.20 The Executive Summary shows the main points from this chapter.

3 Characteristics of country sports tourists

3.1 Introduction

3.1.1 This chapter draws on the evidence to help characterised the participation in country sports and the market in Scotland for those who are active. The chapter deals with:

- Place of residence of participants
- The locations that participants are attracted to for fishing and shooting.
- The size of the groups that participate
- The length of visits
- The activities of participants
- The expenditure of participants
- The demographic profile of participants
- Views on the Scottish product and the Scottish experience
- Competition for the fishing from other locations.

The chapter compares the shooting / stalking market and the fishing market but to some extent they overlap. Participants may visit to shoot or fish. Only a minority do both as part of one visit – 10% of respondents to the fishing survey and 15% of respondents to the shooting survey recorded at least one dual-purpose trip during the year.

3.1.2 The definition of a “tourist” for the purpose of this report is someone who stays the night away from home in Scotland for the purpose of pursuing country sports (even if that person lives elsewhere in Scotland). Unless otherwise specified, the statistics on participants in this report will refer to tourists only. The volume of responses to our surveys of participants, and the fraction of these responses which are tourists, are described below.

3.1.3 The UK shooting and stalking participant survey had 12,440 responses; 3,268 of these had participated in shooting or fishing in Scotland in 2012/2013. During 2012/2013, 2,589 respondents had spent the night in Scotland for shooting or fishing purposes. 77 of the visitors to Scotland for country sports purposes lived overseas.

3.1.4 The fishing participant survey covered 2,134 participants, of whom 1,824 spent the night in Scotland for shooting or fishing purposes in 2013.

3.1.5 There was some overlap in participation between the surveys. The UK shooting sports survey showed that 48% of shooters who spent the night in Scotland took part in freshwater game fishing at some point during the year (not necessarily as part of a dual-purpose trip), and 4% took part in coarse fishing.

3.1.6 The fishing tourist survey showed that 26% of anglers who spent the night in Scotland also took part in live quarry shooting, 7% took part in clay pigeon shooting, and 2% took part in target shooting.

3.2 Place of residence of participants

3.2.1 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.

3.2.2 In terms of fishing, the pattern was similar, with 63% living in England (with 18% from London and the South East and 19% from the North), 28%from Scotland, and 7% from overseas (especially Europe and North America).

3.3 Location of shooting and fishing

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

Table 3.1 Country Sports Participants: Locations

	Shooting/Stalking locations	Fishing locations
Highlands	25%	52%
Borders	19%	40%
Aberdeenshire	9%	36%
Perthshire	19%	32%
Dumfries & Galloway	21%	21%

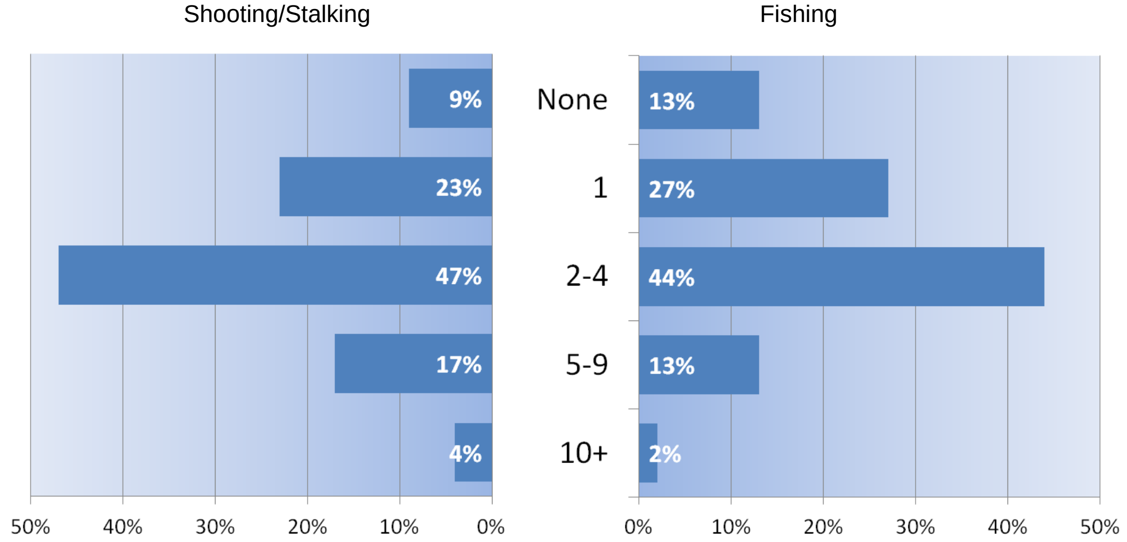
Source: PACEC Survey of Providers and participants, 2013; PACEC Survey of Fishing Participants, 2014

3.3.2 The vast majority of those who fished and shot travelled to Scotland and the location of their attractions by car or van.

3.4 The size of the groups

3.4.1 Fishing and shooting/stalking participants had similar group sizes. Almost half had 2 to 4 companions (ie. a group size of 3 to 5). A quarter had one other companion. Around a fifth were part of larger groups of six to more than ten people.

Figure 3.1 Country Sports Participants: Number of companions

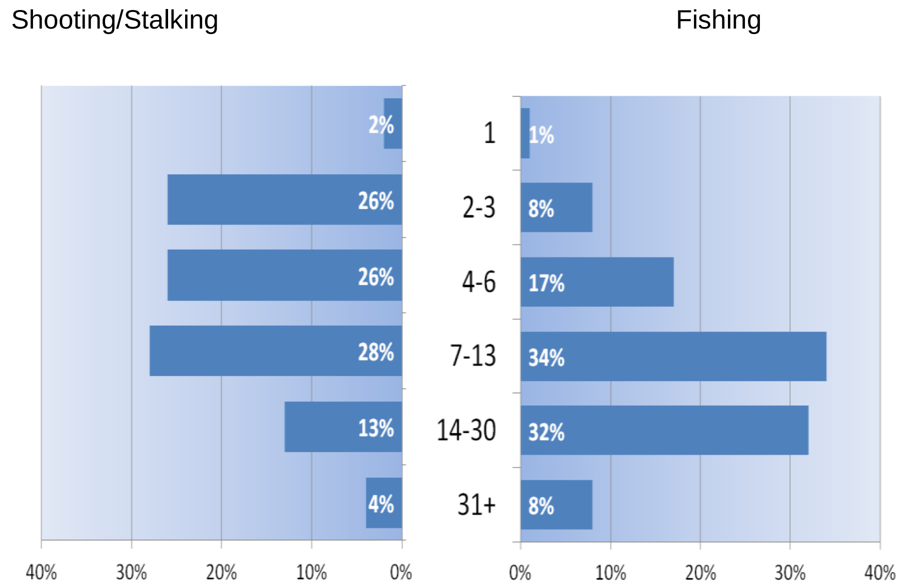


Source: PACEC Survey of Providers and participants, 2013; PACEC Survey of Fishing Participants, 2014

3.5 The length of the visit

3.5.1 Fishing tourists tended to stay in Scotland longer than shooting and stalking tourists. Just over half the latter stayed for six or less nights compared to a quarter of the fishing visitors. More than two thirds of the fishing visitors stayed for seven nights or more.

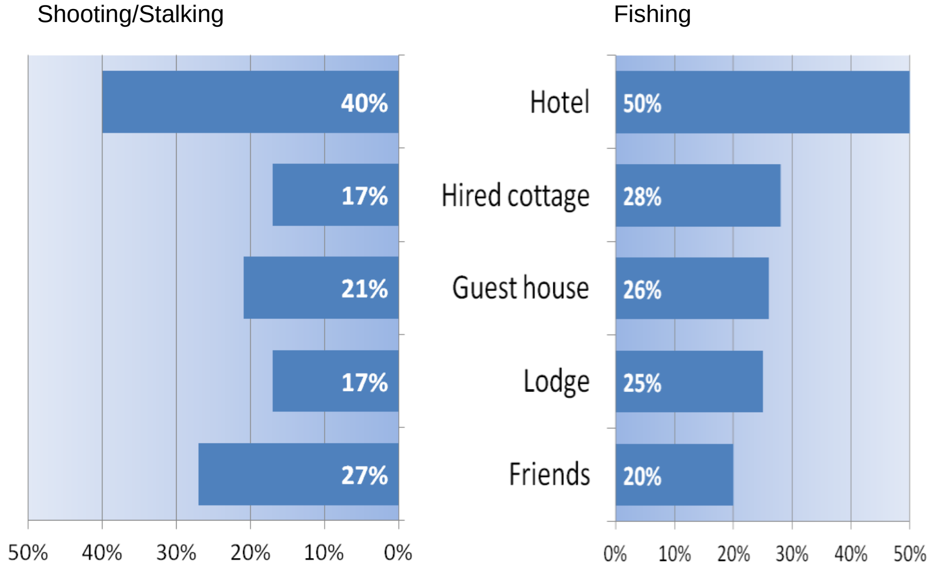
Figure 3.2 Country Sports Participants: Nights Spent in Scotland



Source: PACEC Survey of Providers and participants, 2013; PACEC Survey of Fishing Participants, 2014

3.5.2 The most popular form of accommodation among country sports tourists was a hotel, which was used by 40% of shooting/stalking tourists and 50% of fishing tourists. Fishing tourists were slightly more likely than shooting/stalking tourists to stay in hotels, self-catering accommodation / cottages, guest houses and hunting/shooting lodges but slightly less likely to stay at the homes of friends

Figure 3.3 Country Sports Participants: Accommodation



Source: PACEC Survey of Providers and participants, 2013; PACEC Survey of Fishing Participants, 2014

3.6 The Activities of Participants

3.6.1 Almost all the shooting and stalking tourists shot at live quarry (89%). The most popular activities were deer stalking (48%, with 36% stalking red deer) and driven game (43%, with 10% shooting driven grouse). 20% shot grouse during the year, with 10% taking part in driven grouse shoots and 14% shooting walked-up grouse (with 4% doing both during the year). Almost one in five also partook in clay pigeon shooting and 12% in target shooting:-

Table 3.2 Shooting sports involved in during 2012/13

	Percentages of all respondents
	Total
Any live quarry	**89**
Driven game other than grouse (including duck)	38
Deer stalking (red deer)	36
Deer stalking (other deer species)	30
Other walked-up game (including duck)	19
Inland duck and goose shooting	17
Walked-up grouse	14
Avian pest/predator control (e.g. pigeon)	12
Mammalian pest/predator control (e.g. foxes)	11
Coastal wildfowling	11
Driven grouse	10
Air gun shooting of live quarry	5
Wild boar	2
Wild goat	1
Clay pigeon shooting	**19**
Any target shooting	**12**
Target shooting: air gun	4
Target shooting: black powder	1
Target shooting: small bore	4
Target shooting: full bore (including rifle)	7

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey of Providers and participants, 2013 (q127)

3.6.2 Clay pigeon shooting (19% of tourists) and target shooting (12%) were not as popular as live quarry shooting for the Scottish shooting tourists. However, it may be worth noting that 65% of the tourists shot clay pigeon at some point during the year and 37% took part in target shooting at some point during the year – but not usually in Scotland.

3.6.3 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%). These stocks in combination dominated the fishing activity.

Table 3.3 Fishing tourists: Fish Species

	Percentages of all respondents
	Total
Game – Salmon	94
Game – Rainbow trout	15
Game – Brown trout	39
Game – Sea Trout	48
Grayling	6
Coarse (Pike and all other fish)	4
Other (please state):	2

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey of Fishing Participants, 2014 (Q16)

3.6.4 Over the past few years the participants in both shooting and fishing have enjoyed other activities as part of their visits to Scotland. Those who fish in Scotland tend to stay longer which allows them to participate in other activities. The providers of opportunities have also diversified to influence and to reflect participants' requirements. To assess the range of activities, the fishing tourists were asked what other activities apart from fishing they undertook while in Scotland. The activities showed a general interest in countryside activities and Scottish history and heritage. Just over half (54%) 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%). There were fewer shopping activities or visits to museums and art galleries often located in the more urban areas.

Table 3.4 Fishing tourists: Other Activities

	Percentages of all respondents
Hiking or hill walking	45
Visiting castles, other historic sites	45
Visiting museums, art galleries	19
Golfing	19
Bird or other wildlife watching	47
Water sports/ boating	7
Sightseeing by car	54
Shopping for gifts	42
Other activities (provide details below)	6

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey of Fishing Participants, 2014 (q23)

3.7 Expenditure by visitors

3.7.1 The majority of shooting and stalking tourists spent between £1k and £9k in 2012/13 per group, with around one fifth spending less than £1/2K and 3% saying they spent over £50K while mainly on longer trips

Table 3.5 Shooting and Stalking Tourists: Expenditure

	Percentages of all respondents
	Total
£0-99	1
£100-999	17
£1k-9k	63
£10k-49k	16
£50k-£99k	2
£100k or more	1

Source: PACEC Survey of Providers and participants, 2013 (Q128)

3.7.2 Just over a third of this expenditure was on-site at the shooting or fishing locations, and predominantly consisted of annual shoot subscriptions and shooting or fishing fees per day.

3.7.3 The average expenditure of fishing tourists on trips in Scotland in 2013 was £4.7k. for the group with an average group size of three to five people. The breakdown is as shown in Table 3.6. with most going on fishing fees (43%) and accommodation (28%)

Table 3.6 Fishing tourists: major expenditure categories

	Percentages of all expenditure	Annual expenditure for average tourist
Fishing fees	43	£2,000
Accommodation	28	£1,300
Fuel	8	£400
Food and drink (if not provided with accommodation)	7	£300

Source: PACEC Survey of Fishing Participants, 2014 (q18)

3.8 The Demographic Profile of Participants

3.8.1 Almost all of the shooting and stalking tourists were male (97%). The majority (85%) were over 40, and 15% were retired. This was identified as a problem in the provider survey: *"I am concerned about the small number of young people in the sport, that's our biggest threat I think."*

Table 1.2 Shooting and Stalking Tourists: Gender

	Percentages of all respondents
	Total
Male	97
Female	3

Source: PACEC Survey of Providers and participants, 2013 (q214)

Table 1.3 Shooting and Stalking Tourists: Age

	Percentages of all respondents
	Total
Under 18	1
18-24	2
25-39	12
40-64	64
Over 64 (retired)	15
Over 64 (not retired)	6

Source: PACEC Survey of Providers and participants, 2013 (q215)

3.8.2 Fishing tourists were also overwhelmingly male (98%). They were on average older than shooting participants, with a tenth aged 45. years or more. There were some remarks made by participants that younger fishers were priced out: *"Salmon fishing seems to still be quite an elitist sport on some rivers, and in general is very expensive out with angling associations. There also needs to be more done to attract youngsters into the sport. At 34 it is very rarely I come across salmon fishermen that are younger than myself which needs addressing for the future."*

Table 3.7 Fishing tourists: Age

	Percentages of all respondents
	Total
18-24	0
25-34	2
35-44	8
45-54	22
55-64	34
65+	34

Source: PACEC Survey of Fishing Participants, 2014 (Q28)

3.8.3 Almost a third of fishing tourists (29%) owned their own business or were self-employed. A third were employed whilst more than a third were retired (38%). The majority had a family income of over £50k per annum, with 29% having a family income of over £100k.

Table 3.8 Fishing tourists: Employment Status

	Percentages of all respondents
	Total
Working/employed	33
Self-employed/Own business	29
Retired	38
Unemployed/Not working	1

Source: PACEC Survey of Fishing Participants, 2014 (Q29)

3.9 Views on the Product and the Scottish Fishing Experience

3.9.1 In order to help define the product, shooting and stalking tourists were asked for their views on shooting. Views were overwhelmingly positive about the effects on shooting environments, conservation, and local communities, as well as on personal wellbeing for participants.

- Attractive environments (97%)
- Shooting contributes to this attractiveness (92%)
- Healthy environments (98%)
- Contributes to personal wellbeing (99%)
- Contributes to conservation (94%)
- Contributes to local social fabric (93%)
- Contributes to local employment/skills (92%)

3.9.2 Fishing tourists were also asked for their views of fishing in Scotland and to help define the product. The results are as shown in Table 3.9 below. Almost all participants highlighted the scenery and the environment and the fresh air as being very good or good. In terms of the fisheries the range of opportunities was highlighted along with the services and support of ghillies. These, when combined with the overall recreational experience, were seen as good or very good by just over eight in ten. The ease of booking, made easier by internet access was cited as a strong positive feature. The average features were the ability to hire boats, access to other attractions, food and drink / eating out facilities and the availability of fishing bait and tackle. Fish stocks (in terms of the numbers of fish were seen as average (34%) and poor / very poor (45%) by a significant proportion of participants.

Table 3.9 Fishing tourists: Views on Fishing in Scotland

	Percentages of all respondents				
	Very good	Good	Average	Poor	Very poor
Value for money	20	45	28	6	1
Ease of travel	24	54	20	2	0
Range of fisheries	34	52	13	1	0
Variety of fish	22	48	27	2	0
Fish stocks (numbers)	5	18	34	32	11
Quality of fish	20	48	27	4	1
Availability of tackle/bait	18	46	30	5	0
Boat hire	11	44	39	5	1
Ghillies	37	47	14	2	1
Water quality	33	50	14	3	0
Scenery/environment	77	21	1	0	0
Fresh air	78	21	1	0	0
Customer care	27	48	22	2	1
Ability to meet other anglers	21	50	27	2	0
Accommodation	25	53	20	2	0
Food and drink / eating out	17	48	30	5	0
Overall recreation	29	54	16	1	0
Other attractions	14	46	36	4	1
Ease of booking	44	47	2	0	n/a
Availability of packages	14	38	10	1	n/a

Source: PACEC Survey of Fishing Participants, 2014 (q21)

3.10 Competition from other Fishing Locations

3.10.1 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.

Table 3.10 Fishing tourists: Fishing in Other Countries, Past Five Years

	Percentages of all respondents
	Total
England	79
Wales	33
Northern Ireland	6
Republic of Ireland	22
Scandinavia	14
Iceland	12
Other Western Europe (please state below)	8
Other Eastern Europe (e.g., Russia) (please state below):	10
North America	21
Elsewhere (please state below):	0

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey of Fishing Participants, 2014 (Q20)

3.10.2 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.

3.10.3 A significant number commented that they perceived Scottish fish stocks to be falling steeply, particularly stocks of wild salmon and wild sea trout. *"Salmon fishing in Scotland is on a downward slope, I am looking at other countries now for future trips." This was particularly seen to be the case in the context of the West Coast. "Salmon and sea trout on the West Coast is almost wiped out."* Causes mentioned included salmon farming, which was blamed for sea lice, coastal netting, and predation by seals, dolphins, and protected birds. The Scottish Government's policies were unpopular: *"Scottish government support for salmon farming is destroying salmon fishing in Scotland."*

3.10.4 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.

> *"I have fished in Scotland twice per year for 30 years. The quality of the fishing has deteriorated and there appears to be little interest or willingness in the Scottish government to protect it and no proper appreciation that it is a valuable and precious resource. The netting that is allowed is the prime example. I saw salmon being sold in the markets for 3lbs a pound which are worth thousands in the river if caught by tourists. I am thinking seriously of taking my tourist money to Canada next year because of the poor attitude of the Scottish government."*

Table 3.11 Fishing tourists: Scotland Compared With Other Fishing Locations

	Percentages of all respondents
	Total
Better	46
Same	32
Not as good	23

Source: PACEC Survey of Fishing Participants, 2014 (Q24)

3.10.5 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. Several said they were less likely to return if Scotland voted for independence.

Table 3.12 Fishing tourists: Returning to Scotland for a Fishing Trip

	Percentages of all respondents
	Total
Very likely	85
Quite likely	11
Not very likely	2
Not at all likely	1
Not sure	1

Source: PACEC Survey of Fishing Participants, 2014 (Q25)

Table 3.13 Fishing tourists: Returning to Scotland for General Holiday

	Percentages of all respondents
	Total
Very likely	44
Quite likely	28
Not very likely	16
Not at all likely	9
Not sure	3

Source: PACEC Survey of Fishing Participants, 2014 (Q25)

3.10.6 Fishing tourists 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.

Table 3.14 Fishing tourists: Likelihood of Increased Fishing in Scotland

	Percentages of all respondents
	Total
Very likely	19
Quite likely	39
Not very likely	33
Not at all likely	5
Not sure	4

Source: PACEC Survey of Fishing Participants, 2014 (Q26)

3.10.7 The Executive Summary shows the main points from this chapter.

4 Market segmentation

4.1 Introduction

4.1.1 The participant survey results can be disaggregated and analysed by different types of groups where appropriate. This lets us pinpoint the main differences between groups of tourists. The analysis highlights differences between long-stay and short-stay visitors, in terms of the number of nights stayed in Scotland and some other features, where the differences are interesting:–

- Shooting and fishing visits (number of nights, the size of the groups, frequency of visits, and type of accommodation and bookings)
- The activities of participants (quarry, fishing stocks, and other activities)
- The demographics of participants
- Views on Scotland and competing locations.

4.1.2 Each of these are discussed below for the short and longer stay visitors. It should be noted that the BASC and SCSTG surveys posed different questions to participants in shooting and fishing on some issues, so that in some cases the results are not directly comparable.

4.2 Shooting and fishing visits

Number of nights

4.2.1 The distance tourists had to travel had a strong effect on how many nights they stayed for fishing trips. Fishing tourists who lived in Scotland were more likely to go fishing for a single short stay or weekend visit (50% spent three or fewer nights in the year, compared with an average of 28% of staying visitors). They were less likely than visitors from further afield to stay for seven or more nights overall. Visitors from London and the South West were less likely to stay for only 1–3 nights.

Size of the groups

4.2.2 Those who came to fish for short stays or single weekends only were more likely to travel alone or with one companion. Groups of 5–9 were more likely to stay for at least seven nights.

Table 4.1 Fishing tourists: Number of Companions

	Percentages of all respondents					
		Visitor nights				
	Total	1-3	4-6	7-13	14-30	31+
0	13	**22**	16	13	**9**	18
1	27	**38**	30	25	27	25
2-4	44	37	45	44	44	41
5-9	13	**3**	**7**	**16**	**17**	12
0-49	1	1	1	1	2	**3**
50+	1	0	1	1	1	1

Source: PACEC Survey of Fishing Participants, 2014 (Q10)

Location for activities

4.2.3 Fishing tourists who lived in Scotland were slightly less likely than others to fish for salmon, but significantly more likely to fish for other species, including rainbow trout, brown trout, and sea trout. 70% of those fishing for rainbow trout live in Scotland, compared with 28% of respondents overall.

4.2.4 Fishing tourists were asked which regions of Scotland they had fished in, in 2013. Many tourists had fished in more than one region, with more than half including the Highlands.

4.2.5 Long-stay or frequent visitors for fishing (over fourteen nights in the year) tended to visit Aberdeenshire, Dumfries and Galloway, the Highlands, Perthshire, and the Scottish Borders. 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 (averaging 15.3, compared with 6.7 overall) and to have visited multiple regions, and were much more likely to have visited Perthshire.

Table 4.2 Fishing tourists: Locations of Fishing

	Percentages of all respondents					
		Visitor nights				
	Total	1-3	4-6	7-13	14-30	31+
Aberdeen City & Shire	36	33	**30**	**30**	**43**	**53**
Argyll & the Isles	11	**5**	8	10	**14**	14
Ayrshire and Arran	6	7	7	4	6	8
Dumfries and Galloway	21	20	23	18	19	**34**
Dundee and Angus	12	14	**8**	10	14	18
Edinburgh & the Lothians	7	10	7	6	7	5
Greater Glasgow & Clyde Valley	5	6	6	4	5	8
The Kingdom of Fife	5	6	3	4	5	4
Loch Lomond and the Trossachs and Forth Valley	8	10	9	8	8	12
The Highlands	52	**31**	**31**	**47**	**67**	**76**
Orkney	2	1	2	2	2	**6**
The Outer Hebrides	9	**1**	**5**	9	**12**	13
Perthshire	32	35	**27**	31	33	**48**
The Scottish Borders	40	34	39	**33**	**47**	**55**
Shetland	1	1	0	**0**	1	5
None of the above	0	0	0	0	0	0

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey of Fishing Participants, 2014 (Q6)

4.2.6 There was much less correlation for fishing visitors who took part in shooting sports between the location and the number of nights stayed, although those staying more than thirty nights were more likely to be visiting Dumfries and Galloway. Again, visitors who lived in Scotland were more likely to have visited multiple regions, and were much more likely to have visited Perthshire.

Table 4.3 Fishing tourists: Locations of Shooting

	Percentages of all respondents					
	Visitor nights					
	Total	1-3	4-6	7-13	14-30	31+
Aberdeen City & Shire	4	7	3	3	6	5
Argyll & the Isles	2	1	2	1	3	4
Ayrshire and Arran	2	2	1	1	2	5
Dumfries and Galloway	5	4	2	4	5	**13**
Dundee and Angus	3	4	3	3	3	6
Edinburgh & the Lothians	3	3	3	3	4	7
Greater Glasgow & Clyde Valley	1	3	0	0	1	2
The Kingdom of Fife	2	3	1	2	3	5
Loch Lomond and the Trossachs and Forth Valley	1	0	2	1	1	4
The Highlands	8	4	4	7	10	15
Orkney	0	0	0	0	1	1
The Outer Hebrides	1	0	0	1	2	3
Perthshire	7	7	5	7	10	11
The Scottish Borders	8	5	6	7	8	14
Shetland	0	0	0	0	0	1
None of the above	1	1	1	0	0	0

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey of Fishing Participants, 2014 (Q6)

4.2.7 These findings are broadly confirmed by the shooting and stalking survey, which shows that visitors who stayed for more nights in Scotland for fishing were more likely to visit Aberdeenshire, Loch Lomond, Trossachs, the Forth Valley, the Highlands, or Perthshire, with the Highlands having the strongest correlation with the number of nights stayed.

Frequency of Visits

4.2.8 Visitors who were fishing tended to have made more trips to Scotland in 2013 (average 6.7) than visitors who shot (average 4.4). This effect was particularly strong for visitors who lived in Scotland, who made more trips overall but especially for fishing, and who averaged 15.3 trips a year for fishing and 7.7 for shooting.

Type of Accommodation and Bookings

4.2.9 Visitors who stayed for a total of more than thirty nights for fishing trips during the year were more likely to stay with friends, or in a hotel, guest house, B&B, or a hired cottage or flat. Those who came for fewer than seven nights were less likely to stay in shooting/fishing lodges or hired cottages/flats – the latter may only be available for stays of a week or more, particularly in country areas.

4.2.10 Visitors who fished for trout rather than salmon were more likely to stay with friends, in guest houses, or in caravans/campsites.

Table 4.4 Fishing tourists: Accommodation

	Percentages of all respondents					
	Visitor nights					
	Total	1-3	4-6	7-13	14-30	31+
With friends	20	**14**	17	21	22	**30**
Hotel	50	49	45	**44**	**58**	**60**
Guest house/B&B	26	20	29	24	29	**39**
Accommodation provided by fishery (full/part/board)	11	**2**	**5**	10	**13**	**20**
Shooting/fishing lodge	25	**12**	**11**	25	**34**	31
Hired cottage/flat	28	**8**	**20**	30	**35**	**39**
Caravan	4	5	3	4	4	**7**
Campsite	3	4	5	2	3	6
On a boat	0	0	0	0	0	0
Other (please state below)	0	0	0	0	0	0

Source: PACEC Survey of Fishing Participants, 2014 (Q13)

4.2.11 The shooting and stalking survey showed that those who stayed in Scotland for shooting or fishing were more likely to stay with friends and less likely to stay in a hotel if they stayed for more than thirty nights overall. Those who lived in Scotland were more likely to stay with friends or in a caravan or campsite.

Table 1.4 Shooting and stalking tourists: Accommodation

	Percentages of all respondents					
	Visitor nights					
	Total	1-3	4-6	7-13	14-30	31+
With friends	27	25	**23**	29	**34**	**36**
Hotel	40	**43**	39	37	43	**24**
Guest house / B&B	21	21	19	22	24	**30**
Accommodation provided by fishery/shoot	12	**10**	12	13	15	**20**
Fishing / shooting lodge	17	**7**	15	**24**	**28**	24
Hired cottage / flat	17	**6**	16	**24**	**27**	20
Caravan	5	**3**	**3**	5	**11**	**14**
Campsite	2	2	2	3	3	**7**
On a boat	0	0	0	0	1	2
Other (please specify)	5	**2**	**2**	4	**8**	**25**

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey of Providers and participants, 2013 (q139)

4.2.12 Fishing tourists who came for longer stays or more often were more likely to organise their accommodation through specialist sporting agents or directly with accommodation providers or an estate. Salmon fishers were less likely to organise through the Internet than non-salmon fishers (36% and 46% respectively).

Travel

4.2.13 Longer-staying or more frequent shooting and stalking visitors were more likely to travel to Scotland by car, as were those who fished for rainbow trout or fish which were neither salmon nor trout. This was the main form of transport for most groups anyway. Visitors who came from further afield were more likely to fly, whereas those who lived in Scotland or the North of England or Midlands were more likely to drive.

Table 4.5 Shooting and stalking tourists: Travel to Scotland

	Percentages of all respondents					
	Visitor nights					
	Total	1-3	4-6	7-13	14-30	31+
Car/van	89	**86**	90	90	**94**	95
Motorbike	1	0	0	**0**	**2**	1
Coach	0	0	0	0	0	1
Train	5	5	5	6	4	**13**
Aeroplane	15	13	14	18	18	13
Boat/ferry	7	**3**	6	**9**	**11**	11
Other (please specify)	2	**1**	**1**	3	**5**	5

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey of Providers and participants, 2013 (q136)

Sources of Information Used

4.2.14 Fishing tourists were asked which sources of information they used when they were planning their visit. Those who came for more than thirty nights overall 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. Those who were fishing for trout rather than salmon were significantly more likely to rely on their own personal experience, friends and club members, the Internet, and advice from people in the place they visited.

4.2.15 Those who lived in Scotland were more likely to consult multiple sources of information when planning their trip.

Table 4.6 Fishing tourists: Information

	Percentages of all respondents					
	Visitor nights					
	Total	1-3	4-6	7-13	14-30	31+
Your own personal experience	87	**71**	**80**	87	**94**	**98**
Advice from friends/ club members	34	36	31	**30**	37	**46**
Advice from people in the place you visited	26	20	25	23	**31**	32
Information from a sporting agent	10	**3**	**5**	**7**	**15**	**17**
Information from VisitScotland or a local area tourist board	9	12	10	7	9	13
A guidebook	4	2	6	4	2	3
The Internet (specify websites below)	36	39	40	36	33	40
Country sport related magazines	9	**4**	9	10	11	12
Trip organised by someone else	7	6	6	6	8	6
Another source	0	0	0	0	0	0

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey of Fishing Participants, 2014 (Q14)

4.2.16 Shooting and stalking tourists were also more likely to be relying on their own experience for organising trips if they were staying in Scotland for longer or visiting more often.

Table 4.7 Shooting and stalking tourists: Information

	Percentages of all respondents					
	Visitor nights					
	Total	1-3	4-6	7-13	14-30	31+
Your own personal experience	78	**65**	**72**	**86**	**91**	**97**
Advice from friends/ club members	47	49	48	**43**	48	52
Advice from people in the place you visited	29	**24**	28	**32**	**34**	36
Information from a sporting agent	9	9	7	10	10	12
Information from VisitScotland or a local area tourist board	7	**5**	6	7	**10**	10
A guidebook	2	2	2	**4**	2	3
The Internet	17	16	18	17	19	17
Country sport related magazines	8	**6**	6	8	**13**	7
Trip organised by someone else	10	11	10	8	10	6
Another source	2	2	2	**1**	3	3

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey of Providers and participants, 2013 (q140)

4.2.17 Fishing tourists staying for more than fourteen nights overall tended to arrange their fishing through an agent or directly with the estate. Salmon fishers were significantly more likely than non-salmon fishers to organise their fishing directly with the estate (53% compared with 34%) or through a specialist agency (18% compared with 6%). Those who lived in Scotland were most likely to use the Internet for organisation.

4.2.18 Fishing tourists who also shot, who were staying for more than fourteen nights overall, tended to arrange their shooting through an agent. Those staying for three or fewer nights often arranged shooting sessions through the Internet.

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

4.3 Activities of Participants

Quarry

4.3.1 Shooting and stalking tourists were likely to shoot more types of live quarry if they were on longer trips. This held particularly for stalking of red deer, stalking of other deer species, avian pest/predator control, mammalian pest/predator control, and coastal wildfowling. However, those on longer trips were less likely than those on shorter trips to participate in clay pigeon shooting.

4.3.2 Visitors who lived in Scotland were significantly more likely to take part in clay pigeon shooting and target shooting rather than live quarry shooting.

Table 4.8 Shooting and stalking tourists: Shooting Sports

	Percentages of all respondents					
		Visitor nights				
	Total	1-3	4-6	7-13	14-30	31+
Avian pest/predator control (e.g. pigeon)	61	58	61	59	**68**	**74**
Mammalian pest/predator control (e.g. foxes)	35	**30**	33	34	**46**	**55**
Driven grouse	18	15	**15**	19	**23**	24
Walked-up grouse	16	**11**	15	**20**	**21**	**25**
Other driven game (including duck)	74	75	76	73	71	66
Other walked-up game (including duck)	43	43	42	44	41	46
Coastal wildfowling	16	**13**	18	17	16	**28**
Inland duck and goose shooting	35	33	35	34	38	**45**
Deer stalking (red deer)	31	**19**	**26**	**37**	**46**	**50**
Deer stalking (other deer species)	36	**27**	33	38	**50**	**63**
Wild boar	5	5	5	6	7	**11**
Wild goat	2	**1**	2	2	3	**11**
Air gun shooting of live quarry	20	20	19	18	23	18
Any live quarry	94	**92**	94	**96**	**97**	96
Collecting firearms (including antiques)	7	7	8	6	7	12
Clay pigeon shooting	65	**71**	66	**62**	66	**49**
Target shooting: air gun	19	20	**16**	17	22	20
Target shooting: black powder	5	5	5	4	7	8
Target shooting: small bore	18	16	20	17	20	23
Target shooting: full bore (including rifle)	21	21	21	19	23	29
Any target shooting	37	37	36	34	40	41
None of the above	0	0	0	0	0	0

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey of Providers and participants, 2013 (q127)

4.3.3 Almost all the fishing tourists who came on fishing holidays fished for salmon. Those on the shortest breaks were most likely to fish for rainbow trout and grayling, and 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.

Table 4.9 Fishing tourists: Fish Species

	Percentages of all respondents					
		Visitor nights				
	Total	1-3	4-6	7-13	14-30	31+
Game – Salmon	94	93	**89**	92	**97**	97
Game – Rainbow trout	15	**24**	18	**11**	15	14
Game – Brown trout	39	38	41	39	39	41
Game – Sea Trout	48	43	**38**	48	**54**	56
Grayling	6	**11**	**9**	**5**	6	5
Coarse (Pike and all other fish)	4	6	5	3	3	5
Other (please state):	2	3	2	3	1	2

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey of Fishing Participants, 2014 (Q16)

Other Activities

4.3.4 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.

4.3.5 Salmon fishers were less likely than non-salmon fishers on the whole to take part in other activities, particularly hiking and hill-walking (44% compared with 57%), though they were more likely to play golf (20% compared with 6%).

Table 4.10 Fishing tourists: Other Activities

	Percentages of all respondents					
	Total	1-3	4-6	7-13	14-30	31+
Hiking or hill walking	45	41	45	45	47	48
Visiting castles, other historic sites	45	**34**	46	48	44	53
Visiting museums, art galleries	19	14	22	20	16	**32**
Golfing	19	19	14	17	19	20
Bird or other wildlife watching	47	38	**39**	49	47	55
Water sports/ boating	7	4	6	7	**10**	10
Sightseeing by car	54	46	56	57	53	60
Shopping for gifts	42	34	37	44	44	41
Other activities (provide details below)	6	4	7	7	6	6

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey of Fishing Participants, 2014 (q23)

Expenditure

4.3.6 Expenditure in all categories broadly rose in line with length of stay for fishing and shooting. Fishers for salmon and sea trout tended to spend more than fishers for other fish. The highest spenders came from abroad, followed by London and the South East and Eastern regions.

4.4 The Demographics of Participants

4.4.1 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, with 24% of Scottish visitors aged over 65 compared with an average of 34% overall. By comparison, 47% of visitors from the South West were over 65.

Table 4.11 Fishing tourists: Age

	Percentages of all respondents					
		Visitor nights				
	Total	1-3	4-6	7-13	14-30	31+
18-24	0	3	0	0	0	0
25-34	2	3	4	2	2	1
35-44	8	11	**15**	7	6	**2**
45-54	22	**34**	**27**	23	**17**	21
55-64	34	29	33	33	36	35
65+	34	**21**	**21**	34	38	41

Source: PACEC Survey of Fishing Participants, 2014 (Q28)

4.4.2 Broadly the same age pattern was shown by the shooting and stalking tourists: those who stayed for at least fourteen nights but fewer than thirty nights tended to be retired rather than in the 40–64 age category.

Table 4.12 Shooting and stalking tourists: Age

	Percentages of all respondents					
		Visitor nights				
	Total	1-3	4-6	7-13	14-30	31+
Under 18	1	1	1	1	1	0
18-24	2	**3**	1	1	0	2
25-39	12	15	12	9	14	10
40-64	64	63	66	66	**57**	66
Over 64 (retired)	15	13	13	16	**23**	18
Over 64 (not retired)	6	6	7	7	6	4

Source: PACEC Survey of Providers and participants, 2013 (q215)

4.4.3 Fishing tourists who were employed tended to stay for less than seven nights, whereas the retired were more likely to stay longer. Visitors from Scotland and overseas were most likely to be employed (42% and 41% respectively, compared with an average of 33%), and visitors from the South West were most likely to be retired (48%, compared with an average of 38%).

Table 4.13 Fishing tourists: Employment Status

	Percentages of all respondents					
		Visitor nights				
	Total	1-3	4-6	7-13	14-30	31+
Working/employed	33	**49**	**43**	34	**27**	**24**
Self-employed/Own business	29	24	31	29	30	27
Retired	38	**25**	**25**	37	**42**	**48**
Unemployed/Not working	1	1	1	1	1	1

Source: PACEC Survey of Fishing Participants, 2014 (Q29)

4.4.4 Those on fishing trips who stayed longest and those who lived in Scotland were the most likely to be members of a fishing club in Scotland. Visitors from the North, Midlands, and South West of England were most likely to have joined fishing clubs elsewhere.

4.4.5 Fishers with annual gross family incomes below £25K were more likely to visit for short stays. Visitors from London were most likely to be in the highest income band (52%, compared with an average of 29%).

Table 4.14 Fishing tourists: Annual Gross Income (With Spouse/Partner)

	Percentages of all respondents					
		Visitor nights				
	Total	1-3	4-6	7-13	14-30	31+
£0-£10k	1	4	1	0	0	0
£10k-£25k	7	**12**	8	7	6	7
£25k-£50k	29	27	34	30	**25**	21
£50k-100k	35	32	30	35	37	40
Over £100k	29	24	26	29	32	33

Source: PACEC Survey of Fishing Participants, 2014 (Q31)

4.4.6 Fishers with family incomes over £100K were more likely to fish for salmon and less likely to fish for other fish.

4.4.7 Fishers for salmon were less likely to be members of fishing clubs in Scotland than non-salmon fishers (25%, compared with 39%). Fishers who lived in Scotland were significantly less likely to be members of the Salmon and Trout Association than fishers who were visiting from London and the South and East of England.

4.4.8 Very few women responded to the surveys. Those that did were more likely to have stayed for between fourteen and thirty nights.

Table 4.15 Fishing tourists: Gender

	Percentages of all respondents					
	Visitor nights					
	Total	1-3	4-6	7-13	14-30	31+
Male	98	98	99	99	**96**	100
Female	2	2	1	1	**4**	0

Source: PACEC Survey of Fishing Participants, 2014 (Q27)

4.5 Views on Scotland and Competing Locations

Scotland

4.5.1 Fishing tourists who fished for salmon were much less likely to think they had got very good value for money than tourists who fished for other fish (18%, compared with 37%). They were also much less likely to think the fish stocks were good or very good (21%, compared with 59% of those not fishing for salmon) and that the quality of fish was good or very good (67% of salmon fishers compared with 82% of non-salmon fishers). Salmon fishers were less likely to think the water quality was very good (32% compared with 46%) and were also less happy with the air quality (77% rated this very good, compared with 86% of non-salmon fishers) and other available attractions.

4.5.2 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.

4.5.3 Visitors from the South West were particularly impressed with the ease of boat hire, and visitors from abroad were particularly impressed with the water quality, accommodation, and customer care.

Table 4.16 Fishing tourists: Value for money

	Percentages of all respondents					
	Visitor nights					
	Total	1-3	4-6	7-13	14-30	31+
Very good	20	18	20	21	18	19
Good	45	50	48	45	46	**32**
Average	28	25	27	27	28	36
Poor	6	6	4	6	7	**11**
Very poor	1	1	0	0	1	3

Source: PACEC Survey of Fishing Participants, 2014 (Q21)

Table 4.17 Fishing tourists: Customer Care

	Percentages of all respondents					
		Visitor nights				
	Total	1-3	4-6	7-13	14-30	31+
Very good	27	24	29	29	27	24
Good	48	51	45	47	52	40
Average	22	20	25	21	19	**32**
Poor	2	**6**	1	2	2	2
Very poor	1	0	0	1	0	2

Source: PACEC Survey of Fishing Participants, 2014 (Q21)

Table 4.18 Fishing tourists: The Range of Different Fisheries

	Percentages of all respondents					
		Visitor nights				
	Total	1-3	4-6	7-13	14-30	31+
Very good	34	34	39	32	34	**43**
Good	52	52	50	53	53	45
Average	13	12	9	14	12	11
Poor	1	3	2	2	**0**	1
Very poor	0	0	0	0	0	0

Source: PACEC Survey of Fishing Participants, 2014 (Q21)

4.5.4 Those who stayed for three nights or fewer were slightly less likely to say they would return to Scotland in the next five years for a further fishing trip. Fishers of brown trout were most likely to say they would be very likely to return. Scottish residents were most likely to say they would return, and visitors from abroad were least likely to.

Table 4.19 Fishing tourists: Returning to Scotland for Fishing Trip

	Percentages of all respondents					
		Visitor nights				
	Total	1-3	4-6	7-13	14-30	31+
Very likely	85	**79**	82	84	88	88
Quite likely	11	**16**	12	12	10	9
Not very likely	2	3	4	3	1	3
Not at all likely	1	1	0	1	0	0
Not sure	1	1	**2**	0	1	1

Source: PACEC Survey of Fishing Participants, 2014 (Q25)

4.5.5 Those who stayed more than thirty nights were the most likely to say they would return to Scotland for a general holiday. Salmon fishers were less likely than non-salmon fishers to say they would return. Visitors from Scotland were most likely to say they would return for a general holiday, followed by visitors from the North of England and abroad.

Table 4.20 Fishing tourists: Returning to Scotland for General Holiday

	Percentages of all respondents					
		Visitor nights				
	Total	1-3	4-6	7-13	14-30	31+
Very likely	44	50	38	44	42	**55**
Quite likely	28	29	**36**	28	29	**14**
Not very likely	16	13	14	17	15	19
Not at all likely	9	7	9	**7**	11	9
Not sure	3	1	4	3	3	2

Source: PACEC Survey of Fishing Participants, 2014 (Q25)

4.5.6 Fishers for rainbow trout, brown trout, and fish which were neither salmon nor trout were more likely than salmon fishers to say they would increase the frequency of their visits to Scotland going forwards. Visitors from Scotland were most likely to intend to increase the frequency of their trips, and visitors from London and the South East and South West were least likely to.

Other Countries

4.5.7 Those who stayed in Scotland for over thirty nights to fish were most likely to have fished in other countries over the previous five years, particularly the Republic of Ireland, Scandinavia, Iceland, Northern Ireland, and other Eastern European countries.

4.5.8 Those who lived in Scotland were least likely to have fished in England and Wales over the previous five years (58% and 12% respectively, compared with 79% and 33% of all fishing tourists), and were more likely to have fished in North America (29%, compared with an average of 21%).

Table 4.21 Fishing tourists: Fishing in Other Countries, Past Five Years

	Percentages of all respondents					
		Visitor nights				
	Total	1-3	4-6	7-13	14-30	31+
England	79	76	74	80	81	75
Wales	33	30	31	32	35	32
Northern Ireland	6	4	6	6	7	**12**
Republic of Ireland	22	21	22	19	25	**30**
Scandinavia	14	**5**	16	13	15	**24**
Iceland	12	9	9	**9**	12	**22**
Other Western Europe	8	10	**12**	7	6	7
Other Eastern Europe (e.g., Russia)	10	9	**6**	9	11	**23**
North America	21	22	21	20	21	23
Elsewhere	0	0	0	0	0	0

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey of Fishing Participants, 2014 (Q20)

4.5.9 The typical features of shooting visitors were:

- Aged over 40 (85% of tourists)
- Sometimes retired (15%)
- Very likely to be male (97%)
- Makes 4 or 5 shooting trips to Scotland per year on average
- Often stays in a hotel (40%) or with friends (27%)
- Travels by car (89% of trips) or possibly by aeroplane (15%)
- Relies on own personal experience when planning a trip (78% of tourists) or advice from friends / club members (47%) rather than the Internet (17%) or an agent (9%)
- Shoots live quarry (94%) – chiefly driven game (18% grouse, 74% other)

4.5.10 By comparison the typical features of fishing visitors were:

- Aged 55 or over (68% of tourists)
- Frequently retired (38%)
- Almost exclusively male (98%)
- Likely to travel with 1-4 companions (73%)
- Family income £50k-£100k (35%) or more (29%) - a total of 64% at £50k or more
- Visits often – makes 6 or 7 trips to Scotland per year on average
- Stays in serviced accommodation – typically a hotel (50%) or fishing lodge (25%)
- Relies on own personal experience when planning a trip (87%), backed up by the Internet (36%) or advice from friends / club members (34%)
- Has come to Scotland to fish for salmon (94%)
- Fairly likely to go sightseeing by car (54%), view wildlife (47%) visit historic sites (45%), go walking (45%) or shop for gifts (42%) on the trip
- Very likely to return to Scotland for fishing (85%)

4.5.11 The Executive Summary shows the main points from this chapter.

5 Volume, value, and growth prospects of country sports tourism

5.1 Introduction

5.1.1 The surveys of country sports providers and participants were used to collect data on the following indicators of the volume of country sports tourism in Scotland and its value to the economy. The indicators are shown in chapters 2 and 3:

- Number of trips taken to (or within) Scotland, involving an overnight stay in Scotland, in order to pursue country sports
- Number of nights spent on such trips
- Expenditure by participants on country sports tourism and other activities in Scotland, both at the provider site and elsewhere in Scotland
- Income recorded by providers

5.1.2 We have extrapolated from these key statistics and carried out some modelling to estimate the volume and value of Scottish country sports tourism in terms of the number of trips made to Scotland, the number of nights spent in Scotland, and the expenditure in Scotland. The providers were also asked how their income had changed over the past five years, and the fishing providers were asked how they expected their income and visitor numbers to change over the next five years. Evidence from the discussions with stakeholders is also used to gauge the trends in the Scottish country sports tourism market.

5.2 Volume and value

5.2.1 Using the survey data, and information on the numbers of providers of shooting, stalking, and fishing in Scotland, we have estimated the volume and value of Scottish country sports tourism in terms of the overall number of trips made to Scotland, the number of nights spent in Scotland, and the expenditure in Scotland (both at the provider site and elsewhere). The total number of trips is estimated at 270,000 (with some 140,000 for fishing and 130,000 for shooting and stalking). See Table 5.1. We estimate that a total of 910,000 visitor nights were spent in Scotland in 2013 for country sports tourism. The total expenditure in Scotland by tourists 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 5.1 Volume and value of country sports tourism 2013*

	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*

Note: *Shooting and stalking information was collected for the period August 2012 to July 2013 – it has been assumed that this is equivalent to expenditure for the calendar year 2013
Source: PACEC

5.3 Trends

5.3.1 Shooting and stalking providers were asked about their income over the previous five years, and in particular whether their income had risen or fallen in this time. Over half the providers (56%) reported their income remaining roughly stable over the past five years, while 37% said it was rising (and probably in the recent two years) and only 6% said it was falling. On balance this shows that the sector is growing, and contributes towards optimism for the future.

Table 5.2 Shooting and stalking providers: Income Trends Over Last Five Years

	Percentages of all respondents
	Total
Been rising	37
Stayed roughly the same	56
Been falling	6

Source: PACEC Survey of Providers and participants, 2013 (q85)

5.3.2 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. 28% said shooting was loss-making and not financed through other activities.

Table 5.3 Shooting and stalking providers: Financing of Shooting Sports

	Percentages of all respondents
	Total
Shooting is self-financing and profitable	12
Shooting is self-financing and roughly breaks even	38
Shooting is loss-making but is financed through other activities	22
Shooting is loss-making and is financed some other way	28

Source: PACEC Survey of Providers and participants, 2013 (q99)

5.3.3 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. 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.

5.3.4 Fisheries reported that their average on-site income from anglers was £95K. Of this, 40% is estimated to come from overnight visitors. About half the fishing providers (53%) said their fishery-related 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.

Table 5.4 Fishing providers: Income Trends Over Last Five Years

	Percentages of all respondents
	Total
Been rising	40
Stayed roughly the same	53
Been falling	7

Source: PACEC Survey of Scottish Fishing providers (Q55)

5.3.5 The trends over the last five years showed an overall rise in the numbers of anglers and of overnight visitors (for around a third of providers), although these increases are less marked than the increases reported in income. Just over four in ten providers saw no change, while just over a quarter saw a decline. The rise in activity is likely to have occurred in the past two years or so, as the national economy started to come out of the recession.

Table 5.5 Fishing providers: Angler Number Trends Over Last Five Years

	Percentages of all respondents
	Total
Increased	30
Same	44
Decreased	27

Source: PACEC Survey of Scottish Fishing providers (Q16)

Table 5.6 Fishing providers: Overnight Visitor Trends Over Last Five Years

	Percentages of all respondents
	Total
Increased	23
Same	59
Decreased	18

Source: PACEC Survey of Scottish Fishing providers (Q19)

5.3.6 Just over a quarter of providers thought fishing in Scotland overall would increase over the next five years, but they tended to think their own businesses would improve slightly more. Four in ten considered that activity would stay the same while about a third thought there would be a decline.

Table 5.7 Fishing providers: Overnight Visitor Projections over the Next Five Years

	Percentages of all respondents	
	Scotland overall	This business
Increase	27	30
Stay the Same	43	46
Decrease	30	24

Source: PACEC Survey of Scottish Fishing providers (Q32/35)

5.3.7 The evidence on observed trends over the past five years, compared with projected trends for the next five years, shows that the rate of growth over the next five years is not expected to match the growth over the previous five. Evidence from interviews with stakeholders suggests that while the number of participants in country sports may not have fallen significantly over the recessionary period, the amount of activity per participant fell in line with a nationwide drop in leisure expenditure, increased savings rates, and general "belt-tightening". There was therefore capacity for activity to increase fairly rapidly as the economy improved, subject to the attractiveness of fishing activity in Scotland and the Scottish product.

5.3.8 A steep fall in returning salmon, and consequently in visiting anglers, was noted by some providers and stakeholders, and was attributed to the proliferation in fish farms along the West coast and to netting practices. *"The fish farming industry is destroying thousands of jobs in salmon associated hospitality all along the west coast of Britain."* Salmon fishing, along with most freshwater fishing, is constrained by the availability of a natural population and can only be enhanced by conservation and habitat management, not by breeding, in a broadly similar manner to grouse and (to an extent) deer. Pheasant and partridge are bred extensively for shooting purposes and therefore do not face this intrinsic natural constraint, although the availability and productivity of their habitats and the required conservation effort are constraints upon shooting opportunities. Rainbow trout can be farmed for rod and line fishing as a way of evading the population constraints which affect most game fishing.

5.3.9 Continued salmon fishing in Scotland was also said to be threatened by sea lice, the establishment of protected seal sites and restrictions on controls of the seal population.

5.3.10 More local threats to fisheries mentioned by providers and stakeholders included nearby windfarm construction.

5.3.11 The Executive Summary shows the main points from this chapter.

6 Economic impacts

6.1 Introduction

6.1.1 Based on the evidence from the survey results and stakeholder discussions, estimates have been made of the direct and indirect employment effects and GVA (gross value added). These arise through the visitors who stay overnight as part of their shooting and/or fishing trips.

6.2 Employment

Shooting and stalking

6.2.1 Live quarry shooting is highly seasonal, as there are restrictions for each quarry species on when during the year shooting may take place. For example, the red and black grouse season in Scotland lasts for roughly four months, between August the 12th and December the 10th, grey and red-legged partridge have a 5 calendar month season from September the 1st to February the 1st, and red deer stalking may take place between August the 1st and April the 30th for males and November the 1st to March the 31st for females. As a result, the level of employment supported by live quarry shooting varies throughout the year. Driven game shooting makes extensive use of short-term temporary employment in the form of "beaters", to flush out wild game, and loaders – these people may only work for a few driven days per year and may or may not be paid, making it harder to quantify the annual impact of shooting employment. Employment at dedicated clay ranges and indoor shooting ranges is typically less variable and shooting opportunities may be provided all year round.

6.2.2 The respondents to the survey of shooting providers were asked to quantify the number of paid full-time equivalent employees (FTEs) supported by shooting throughout the year, where one FTE is considered to be one employee working a 37 hour week for 250 days a year. For example, one employee working full-time for 6 months of the year would count as 0.5 FTEs, as would one employee working half the week for the whole year.

6.2.3 It is estimated that 2,600 paid FTEs at shooting and stalking providers in Scotland are dependent upon income from overnight visitors. This figure is arrived at by using the survey results and grossing up for the known population, and characteristics, of shooting providers in Scotland.

Fishing

6.2.4 Fishing activity is also seasonal, but by contrast with shooting the closed season for fishing varies from river to river as well as species to species. In practice, fisheries may not offer fishing on every day during their season, and may increase their staffing levels for the time of year which they perceive to be busiest.

6.2.5 To measure this varying activity, the fishing providers were asked in the survey to divide the year into two portions – a “busy” season and an “off” season – and specify the full-time equivalent employment supported during each season. The average length of the “busy” season was 4.4 months, typically starting in April or May and ending in September or October. Average FTE employment in the “busy” season was 3.3, and in the “off” season it was 2.7.

6.2.6 Across the year it is estimated that 1,800 paid FTE jobs are supported at fisheries by the expenditure of overnight visitors. Again this estimate was made by grossing up the survey sample figures for the whole population of relevant fisheries and their known characteristics.

6.2.7 Combining the FTE estimates for shooting and stalking and fishing there are some 4,400 paid FTEs supported by the expenditure of visitors.

Multiplier effects

6.2.8 Using the analysis of supply chain expenditure we conducted for the UK-wide shooting sports study, we estimate that there was an employment multiplier of 1.58 associated with shooting sports in Scotland. This is known as a Type I multiplier - it measures the additional employment generated by purchases in the supply chain to[3] shooting sports (the "indirect" employment), but not the additional employment supported by expenditure of wages (the "induced" employment). Multipliers including both indirect and induced employment are known as Type II multipliers.

6.2.9 If this Type I multiplier were applied to the 2,600 FTE jobs supported by visitor expenditure on shooting, it would result in an additional 1,500 FTE jobs supported in the supply chain within Scotland, giving a total of 4,100 direct and indirect FTE jobs.

6.2.10 The most recent Type I (employment) multipliers for Scotland were published in August 2014 for the year 2011. The average employment multiplier among 98 industrial sectors was 1.62, and the median was 1.48. Using the median Type I multiplier of 1.48 would suggest that an additional 900 FTE jobs are supported in the supply chain in Scotland as a result of visitor expenditure on fishing.

6.2.11 Overall, therefore, there are 4,400 direct FTE jobs resulting from overnight expenditure on Scottish country sports, and a further 2,400 indirect FTE jobs, a total of 6,800.

6.2.12 The average Type II employment multiplier for 2011 across the 98 industrial sectors was 1.98, and the median 1.85. Applying the median multiplier of 1.85 to the 4,400 direct FTE jobs would suggest total direct, indirect and induced employment of 8,100 FTE jobs supported by visitor expenditure on Scottish country sports.

[3] * Shooting sports is also a supplier to other industries, such as game meat processing, and arts and crafts based on "horn" and other natural materials.

6.3 Gross value added

6.3.1 The economic impact of country sports in money terms can be measured by Gross Value Added (GVA) utilising the survey results grossed up for the population. It is equal to the amount of wages and profits generated by providers of country sports. This is equivalent to taking the value of the inputs required to provide country sports (i.e. raw materials, services) and subtracting this from the value of all the goods and services produced. It is the market value of the work undertaken.

6.3.2 Our central estimate of the direct GVA attributable to the country sports activities of overnight visitors to Scotland is £50 million, with £21 million generated by shooting and stalking and £29 million generated by fishing.

6.3.3 These estimates were arrived at by two separate methodologies, as the questionnaires for the shooting and fishing sections of the project were slightly different. In both cases, the total GVA is the weighted sum of the wages and profits reported in the surveys by country sports providers. The fishing providers were asked to state their total income, and the fraction of their income which was attributable to overnight visitors This data was checked for consistency both within individual responses and across the sector with adjustments made where necessary. The estimate of overnight visitor GVA is the total GVA multiplied by the overnight visitor income share with an upward adjustment to reflect other visitor expenditure off site on services and goods.. Shooting providers were asked to estimate the number of visitor nights, on site and locally, attributable to their activities. Their total GVA was multiplied by the ratio (total visitor nights) / (gun days), with an upwards adjustment based on the evidence due to the fact that while most forms of income could be split by the same ratio, all income from accommodation (and an increased share of income from catering) could be presumed to accrue from overnight visitors.

6.3.4 This estimate of GVA applies to the value of the activities carried out by the providers on-site only. Additional GVA is generated by companies in the supply chain to the providers, and through the expenditure of participants off-site (for example, expenditure of firearms, ammunition, tackle, and transport). Estimating the total GVA generated in the economy of Scotland would require extensive consultation with local suppliers and was beyond the scope of this research. However, it is instructive to note that survey research with fishing providers, and case study research undertaken with shooting providers in the main study, indicated that a significant proportion or expenditure by providers goes to local suppliers, primarily within 10-15 miles of the country sports site. This proportion was quantified as 80% by fishing providers. This suggests that a high proportion of expenditure by country sports providers is retained within the economy of Scotland.

6.3.5 The Executive Summary shows the main points from this chapter.

7 Conclusions and Implications for Future Activity

7.1 Conclusions

7.1.1 The results of the research show that country sports activities comprising, in this study, shooting, stalking, and fishing make a significant contribution to the Scottish economy and the relevant Scottish regions and local economies.

7.1.2 The specific volume and value estimates are 910,000 visitor nights overall spent in Scotland for country sports tourism, with a total expenditure in Scotland of £155m. Freshwater fishing accounted for the majority of the nights, largely because fishing trips were longer than shooting trips. Fishing contributed 630,000 nights and £86m expenditure; shooting contributed 280,000 nights and £69m expenditure.

7.2 The Scottish Market: Participants and their Characteristics

7.2.1 Participants are attracted to Scotland from a wide range of geographical markets. The main market is England (with six in ten visitors), especially the North of England (with closer proximity in terms of access and travel to Scotland) and London and the South East. The Scottish market accounts for just under one in three participants (who stay near the shooting and fishing sites for relatively short periods). The other main markets are Europe, especially Western Europe including Scandinavia, and North America.

7.2.2 The main size of each group that participates is between three and five people, both for fishing and shooting, followed by two people. The people in these groups account for some three quarters of the visitors.

7.2.3 Shooting and fishing participants were overwhelmingly male, who accounted for over nine out of ten visitors.

7.2.4 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 and with twice as many retired people. There are small minorities in the 25 to 44 age range and very few below the age of 25 years.

7.2.5 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). The annual gross income for fishing participants (including that of a spouse or partner) was £25K–£50K, £50K–£100K, or over £100K, with roughly a third in each band of income.

7.2.6 The range of total expenditure for shooting and stalking varies widely with between £1K and £9K being the main range of expenditure in 2012/13 for all visitors. Less than a fifth spend less than £1K or £10K or more, although there is a very small minority who spend £50K+, who are mainly on longer visits.

7.2.7 The average length of stay varied widely with those who were fishing tending to stay for longer periods compared to those shooting. Most fishing tourists tended to stay between seven to thirteen or fourteen to thirty nights. The shooting visitors stayed for similar periods but more visited for just two to three nights. The main period of stay overall was seven to thirteen nights.

7.2.8 Around half the participants stayed in hotels and a quarter in guest houses, followed by hired cottages and lodges (especially the fishing tourists). The shooting tourists used similar accommodation but were more likely to stay with friends (just over a quarter).

7.2.9 The main form of travel for shooting or fishing was by car or van (reflecting those who travel from the Scottish and English markets). Some one in six also flew or arrived by boat or ferry.

7.3 The Shooting and Fishing Products

7.3.1 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 have shaped and developed their offer to reflect the natural strengths of Scotland and the requirements of participants from increasingly wider markets. There has been diversification to provide, for example, accommodation and alert visitors to other activities and attractions 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) which has meant that providers have needed to be sensitive to what could be provided and the prices charged, especially in the middle and lower market ranges.

7.3.2 On the shooting activity, almost all participants were engaged in live quarry shooting (combining walked up and other driven game, avian and mammalian pests, grouse, and deer stalking). Two thirds are attracted by clay pigeon shooting and a third by target shooting. The shooting was mainly in the Highlands, Dumfries and Galloway, the Borders, and Perthshire.

7.3.3 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 accommodation was also attractive – the hotels and guest houses.

7.3.4 The fishing participants are engaged primarily in salmon and sea and brown trout fishing. Other minority species include grayling and rainbow trout. The activity was primarily in the Highlands, the Borders, Aberdeenshire, and Perthshire on the main salmon and trout rivers The facilities also include a wide number of fisheries and an attractive combination of the ghillies, accommodation (mainly off site), boat hire opportunities, fishing tackle, and bait.

7.3.5 Those who went fishing were attracted by the scenery, the environment of the beats, the fresh air, and the overall recreational experience. The range of fisheries and different opportunities were important as were the services and support of the ghillies. Other positive features were the ease of booking, the accommodation available (especially hotels and guest houses), and the customer care.

7.3.6 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.

7.3.7 The providers also considered that key parts of the product offer were the tradition and heritage of fishing and the locations, the privacy and exclusivity of fishing in Scotland (away from other tourists), and the longer fishing season compared to other competing locations. There were also ease of travel to the fishing locations, the water quality, the range of fisheries, and the ability to meet other anglers and share daily fishing stories and experiences.

7.4 Future Growth: Opportunities and Weaknesses

7.4.1 The research indicates, based on the views of the providers, that activity by the number of visitors in Scotland has stayed the same for just over half of providers over the past five years. However, the picture is mixed, in terms of the number of participants and income. This applies to both the shooting and the fishing providers. For just over a third of the shooting providers, income has been rising, probably for the higher end of the market. In the fishing sector angler numbers have risen for around four in ten providers and overnight visitor trends have risen for around a quarter. In shooting, income has fallen for around a quarter of providers. In the shooting sector numbers have fallen for almost a tenth of providers and overnight visitors have decreased.

7.4.2 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, although around a quarter to three in ten saw a decrease in their business and in Scotland as a whole respectively.

7.4.3 There were some key influences at work and scenarios which it was thought would affect future activity in both shooting and fishing. The future stabilisation and growth of the economy especially for the British market and the European and North American markets was important. While the British and North American markets were moving out of recession, there was uncertainty over the European markets which persisted (even in Germany and France) although the Scandinavian markets were more buoyant.

7.4.4 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.

7.4.5 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 both the shooting and fishing sectors. 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 and conservation, the rural access, the technology for 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, size and variety of fish, value for money related to these, and the impact of regulations.

7.4.6 The fish stocks in particular were seen by providers and stakeholders as declining and were perceived to some degree be impacted upon by netting in rivers and at sea (mainly in the perceptions of visitors) and by aquaculture, lice, and seals. The participants also expressed relatively strong and numerous views on these aspects, with points about a decline in the quality and availability of fish and the perceived strong impact of netting and fish farming.

7.4.7 The fishing participants fish in other locations outside Scotland. Almost four in ten had fished in other waters in England over the past five years, and a third had fished in Wales over that time period. Overseas, a fifth fished in North America and just over one in ten in Scandinavia, Iceland, and Eastern Europe, with Russia mentioned. While almost half thought the Scottish fishery experience was better than elsewhere, a third thought it was about the same and a quarter said it was not as good. 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.

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

7.5 Broad Policy Implications

7.5.1 Arising from the research and the conclusions there are some broad policy implications that can be taken into account in order to strengthen the Scottish offering in shooting, stalking, and fishing to increase the number of visitors and expenditure, and improve the economic and wider benefits for Scotland. Taking these forward, as appropriate, rests with the providers of opportunities, the stakeholders, the SCSTG and the Scottish Government, amongst others, and depends on the roles and responsibilities they share, the existing measures carried out, the mechanisms and availability of resources, amongst other factors, events and opportunities.

The Market

- Recognising that while both shooting and fishing appeal to visitors from a wide range of locations there is a concentration from England – the North, London and South East. Steps could be taken to increase market share from other parts of the UK (especially the Midlands and East) as well as the Western European markets and North America.
- There is a very pronounced bias towards male participants. Consideration should be given to attracting female participants (including those who accompany their male partners to Scotland) through promotion and development of the core products.
- Participants in shooting and fishing are overwhelmingly from the middle and older age ranges (especially for fishing). Marketing and product development should be undertaken to attract the younger age groups to encourage their initial and ongoing participation as the next generation of visitors. This would help change the image and strengthen the appeal of the sports.
- Participants should be encouraged to stay for longer in Scotland as part of their shooting and/or fishing trips or through engagement in the other attractive outdoor activities and visits to other attractions in the countryside and the cities.

The Product

- The shooting and fishing products have been enriched through the diversification of services offered by providers, for example accommodation. The products could be strengthened further by linking the offer to the wider range of other outdoor activities and visitor/tourist attractions in Scotland. This should help deepen the sense of the "Scottish experience" which visitors are attracted by.
- The country sports environments, conservation methods, and habitats are attractive to shooting and fishing participants and increasingly to other visitors. This latter group is an emerging market segment which could be encouraged.
- To strengthen their products the providers and stakeholders should take steps to lessen the impacts of regulations related to quarry and conservation/environmental management without detracting from the product. In fishing the issue was the steps that should be taken to increase the quality, size and variety of fish stocks and address the issues affecting these including netting and aquaculture, actual and perceived, amongst other aspects such as habitats and natural breeding.

7.5.2 These measures relate to product development, target markets and the mix of customised promotion and advertising that could be used both for the specific activities in their own right and the overall tourism offer for Scotland. They relate to the access and booking arrangements and the move to online services which should be strengthened in a coordinated way.

7.5.3 Continued measurement of the performance of the industry can be undertaken using a similar methodology to the present study, incorporating surveys of fisheries, shooting and stalking providers, and visitors, augmented with case studies. In terms of assessing future activity and performance, the following qualitative and quantitative indicators are important:

- Characteristics of providers: employment (full-time, part-time, seasonal), nature of sporting opportunities and number of days provided, levels of participation, income, expenditure, marketing activities
- Characteristics of participants: demographics, sporting activities undertaken, expenditure on country sport, trips to Scotland, accommodation and facilities used, other activities pursued in Scotland
- Views of providers: future prospects for their business and the industry, perceived competitive advantages and disadvantages relative to other activities and country sports elsewhere in the world
- Views of participants: experience of country sports in other nations, views of strengths and weaknesses of Scottish country sports, value for money, facilities, range and quality of activities, customer experience.

The survey topics used in the present study are shown in Appendix A.

Appendix A Survey topics

A1 Survey of fisheries

- Membership of organisations (for contact list deduplication)
- Characteristics of provider and fishery
- Facilities provided
- Fishing available – species, days, anglers
- Angler-days (tourist/other, by species)
- Location of anglers in UK and worldwide and trip lengths
- Income (by source)
- Expenditure (tourist/other, capital, operational, locally and in Scotland, rest of UK, and overseas)
- Trends in number of days, visitors, income, industry in general
- Conservation activities
- Employment (full-time, part-time, seasonal, occupations)
- Location of staff residence
- GVA measures: staff compensation, profit
- Other activities: training, apprenticeships, links with local organisations
- Competing countries and Scotland's competitive advantages and disadvantages
- Promotional methods
- Likelihood of persistence of impacts if fishing were not provided at the site: jobs, skills, conservation, local links etc

A2 Survey of fishing participants

- Membership of organisations (for contact list deduplication)
- Residence
- Parts of Scotland fished in
- Characteristics of fishing trips: overnight stays, days fished, number of trips, method of travel, companions, accommodation, sources of information, booking/organisation methods
- Species fished for
- Expenditure by category – on-site, off-site, capital
- Other countries fished in, strengths/weaknesses of fishing in Scotland relative to other countries
- Views of features of fishing trips in Scotland (ratings – value for money, range/variety, stocks, quality of fish, water, environment, accommodation, other hospitality etc)
- Other activities pursued in Scotland, and likelihood of return to Scotland for fishing or other holiday
- Demographics, employment status, family income

A3 Survey of shooting/stalking providers

- Membership of organisations (for contact list deduplication)
- Characteristics of provider and site
- Types of shooting provided (quarry, method e.g. driven / walked-up, clay, target)
- Shooting days & private/member days sold, by type of shooting, and average participation
- Total quarry shot by species – recreationally and as part of job
- Destination of edible quarry
- Visitor nights – on-site and elsewhere locally
- Income (by source)
- Expenditure (tourist/other, capital, operational, locally and in Scotland, rest of UK, and overseas)
- Trends in number of days, visitors, income, industry in general
- Conservation activities and habitat types managed, labour required
- Employment (full-time, part-time, seasonal, occupations)
- Location of staff residence
- GVA measures: staff compensation, profit
- Other activities: training, apprenticeships, links with local organisations, collaboration with suppliers/providers
- Impacts of shooting regulation
- Pest/predator control undertaken by sporting shooters
- Likelihood of persistence of impacts if shooting were not provided at the site: jobs, skills, conservation, local links etc

A4 Survey of shooting/stalking participants

- Membership of organisations (for contact list deduplication)
- Residence
- Parts of Scotland shot in
- Characteristics of shooting trips: overnight stays, days shot on, number of trips, method of travel, companions, accommodation, sources of information, booking/organisation methods
- Shooting activity: days spend shooting by quarry, method e.g. driven / walked-up, clay, target.
- Expenditure by category – on-site, off-site, capital
- Views of features of shooting (quality of environment, benefits to well-being, social and environmental impact of conservation and employment)
- Consumption and destination of shot quarry
- Annual expenditure on other leisure activities if shooting were unavailable
- Ownership of gundogs
- Demographics, employment status, family income