

Fishing in Scotland Executive Summary

BACKGROUND

In April 2007, VisitScotland commissioned TNS to undertake research into the consumer angling market in Scotland. VisitScotland's aim was to give a deeper understanding of the current and potential consumer fishing market in Scotland. Specific objectives focused on uncovering the characteristics of angling holidays in Scotland; trip planning and also opinions of Scotland in comparison to its competitor destinations. Information was to be sourced in a way that could clearly segment any differences/similarities between the 3 main types of angling – game, sea and coarse.

The research comprised of three stages:

- Initially a review of literature on angling was undertaken to not only give an indication of the market size within the UK population, but also to identify any previous angling research that had been carried out in Scotland.
- A quantitative survey was completed by a total of 1,452 respondents. This was a combination of VisitScotland enquirers, a sample of members from the TNS Activities Panel¹ who had all registered an interest in angling, and an additional sample of anglers used to supplement the total.
- In order to offer further insight into the quantitative findings, 6 focus groups were carried out with anglers at 3 locations across the UK. Individuals were selected on the basis of the type of angling they participated in and whether or not they had visited Scotland for an angling holiday within the last 2 years.

MAIN FINDINGS

Angling within the UK population

To give an indication of the size of the angling market in the GB population, a TNS Omnibus Survey undertaken in May 2007 estimated that 5% of the adult population had taken part in fishing during the previous year, which equates to approximately 2.2 million adults. By comparison 9% took part in bird watching, and 7% took part in mountain biking.

Within the UK, the types of angling undertaken varied greatly depending on country of residence. The majority of anglers resident in Scotland took part in game angling (71%), compared to less than a quarter of English anglers (21%). In contrast, a larger proportion of English anglers took part in coarse angling (43%) while this type of angling was undertaken by a much smaller proportion of Scots (3%).²

To give a clearer indication of the similarities and differences between these segments, the quantitative survey explored the profile of anglers and characteristics of recent angling holidays.

¹ The TNS Activities Panel is a database of households in the UK who have provided details of their recent tourism and leisure behaviour, including participation in a number of leisure activities.

² Country Sports – Their Economic, Social and Conservation Significance (1997); Public Attitudes to Angling (2005)



Angler Profile

Over 80% of anglers were male and over 40% were aged 55 and over. Sea anglers were most likely to have children in their household which was reflected in their slightly younger profile, compared to coarse and game anglers.

Considering the older age profile of anglers in the survey, it is not surprising that two thirds of respondents had been participating in angling for more than 20 years. Also many anglers were frequent participants with 62% angling 10 or more times per year.

With regards to area of residence, nearly half of coarse and sea anglers were from the South of England whereas game anglers were much more prominent in Scotland and the North of England, reflecting the type of angling available in each area.

Within the survey sample, 46% had taken part in sea angling in the past 2 years, 40% had been coarse angling and 28% had been game angling. Most anglers only undertook one type of angling in this period (70%), with a very small proportion doing all three types (3%).

Angling holidays

Overall, 41% of all anglers took angling holidays at least once per year, with game anglers most likely to take an angling holiday annually or more often (56%).

In terms of location, angling holidays to destinations within the UK were most common, particularly to locations in England and Scotland. Ireland had also been visited by around a quarter of anglers for a holiday. Angling holidays overseas were less prominent with less than 10% of anglers visiting any of the countries asked about.

Angling in Scotland

Game anglers were the most frequent visitors to Scotland with 28% visiting between 2 and 3 times in the last 2 years. In half of all trips, angling was the main but not only purpose of the holiday (50%).

The types of angling most likely to be undertaken during an angling holiday in Scotland were sea angling from the shore (31%), wild brown trout (28%) and salmon angling (26%). When combined by type of angling, game angling was the most popular type undertaken on visits taken in Scotland (56%) followed by sea angling (31%) then coarse (8%).

In terms of regions visited, the Highlands and South of Scotland were the most visited areas for angling holidays in Scotland (35% and 32% of visits respectively). Overall, anglers were most likely to be on holiday with their husband/wife or friends. Coarse anglers were most likely to have non anglers in their party, whereas game anglers were most likely to take an angling trip alone.

During their angling holiday, other activities participated in included sightseeing by car (50%), visiting historic sites (40%) and shopping for gifts (37%).

Although accommodation on angling holidays in Scotland varied by type of angler, B&Bs/guesthouses and hotels were used most overall (25% and 23% respectively). Game anglers were the most likely to stay in a hotel, whereas self catering options and caravan/camping were more popular with sea and coarse anglers.



Trip Planning and Information Sources

Respondents were most likely to use their previous experience of angling destinations (77%) and advice from friends and family (57%) when sourcing information about angling holidays. Angling magazines (54%) and tourist board brochures (33%) were also fairly popular tools.

The highest proportion of trips were booked 2-3 months in advance (31%). Respondents favoured booking both their angling and accommodation directly with operators (37% and 49% respectively). 9% used the VisitScotland website to book their accommodation while similar sized proportions used either visitscotland.com or fishscotland.com to book their angling (8% and 7% respectively).

Measuring angler experiences

The study also looked at elements of the angling visitor experience (such as the price of angling and facilities available) in terms of satisfaction, their relative importance and how Scotland compares with other angling destinations.

Across the total market, Scotland received the highest rating as an angling destination. Ireland and England were the closest competitors while North America and New Zealand were both rated highly for sea and game angling but seen as less feasible than destinations in the British Isles due to their distance.

While the main appeals of Ireland included the friendly people, vibrant night life and angling facilities, some concerns were expressed about the low quantities of fish to be caught and requirement to travel by ferry. England appealed most as a destination to the coarse and sea anglers, reflecting the types of fishing available.

While many game anglers saw Scotland as 'unmatched', it had less unique appeal amongst sea anglers and lower level of appeal overall to coarse anglers. Indeed, many coarse anglers indicated that the (perceived) lack of coarse angling opportunities in Scotland represented a barrier to future visits.

Although the needs of different types of angler varied, Scotland rated particularly well in terms of the availability of good scenery and peaceful & quiet locations - attributes which were important to all types of angler. However, potential issues for anglers on holiday in Scotland included the price to take part in angling, the quantity of fish available to catch, the variable quality of accommodation and, for coarse and sea anglers, the perception that Scotland catered only for game anglers.

Identifying market segments

Two main market groups were identified within the anglers - Existing Repeat Loyal Anglers and Best Prospect Anglers.

Existing Repeat Loyals are anglers who have visited Scotland frequently in recent years and will probably continue to do so if the product remains at an acceptable and affordable level. Best prospect anglers, on the other hand, can be described as anglers who take angling holidays, and rate Scotland highly but haven't taken an angling holiday in Scotland recently.



These market groups can be split into the following segments. The following bullets show how these segments compare in size and the main needs and priorities for each;

- **Repeat Loyal Game Anglers** (18% of UK anglers) – priorities for this segment whilst on an angling holiday are good quality of fishing, peace and quiet, scenery and quality accommodation.
- **Repeat Loyal Sea Anglers** (12% of UK anglers) – availability of sea angling as well as other activities, and boat hire are key needs for this segment.
- **Best Prospect Game Anglers** (6% of UK anglers) – quality of fishing is important to this group as well as good scenery and peace & quiet.
- **Best Prospect Sea Anglers** (11% of UK anglers) – priorities for this group are quality and quantity of fishing and chances of success and enjoyment.
- **Best Prospect Coarse Anglers** (14% of UK anglers) – key needs for this group are angling facilities, good quality and quantity of fishing, high chances of success and peace and quiet.

CONCLUSIONS & RECOMMENDATIONS

It is vital to recognise that angling is not a single market – game, coarse and sea anglers have different profiles, behaviours and motivations.

Knowledge of angling destinations is largely based on word of mouth communications (including on-line). This may be the source of negative misconceptions but could be exploited to develop a more positive 'buzz'.

Anglers are consumers of information – high readership of magazines (angling type specific) and the use of angling web sites is common. The detailed information in the brochure was well received and could be more prominent.

Types of visit vary from dedicated angling trips, where angling is the sole purpose, to trips where angling is more incidental, such as during a family holiday. An angler may fit into more than one of these categories on different occasions.

While visits with partner/family require activities to 'keep them occupied' and accommodation of a certain quality, angling trips only require appropriate facilities and basic quality.

The priorities for VisitScotland should be to focus on retaining existing, loyal segments by continually improving the angling product. It should also be a priority to counter misconceptions of Scotland as an expensive game destination promoting opportunities for coarse and sea angling to be distinct markets.