

**Non-residents' demographic characteristics, behaviour and
attitudes towards salmon angling in Scotland**

by

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ABSTRACT

The benefits of angling may be assessed from a variety of perspectives, yet surprisingly few contain the essentials upon which more strategic marketing planning might be developed. A sound case, in terms of the monetary significance of angling tourism to the Scottish economy, has been widely recognised in the economic impact studies of Radford, (2004, 2009). Yet to date, very little is known about the essential, more individual, aspects of visiting anglers to Scotland, if associated benefits are to be capitalised upon. This research aims to identify the demographic characteristics of non-resident salmon anglers, their behaviour in terms of planning and booking the trip, motivations and deterrents to fishing in Scotland. Exploration also encompasses how the overall experience has been marketed and communicated to them. The research then investigates anglers' attitudes towards pertinent aspects of their angling holidays in Scotland, both in respect of the recreational fishing industry and the Scottish tourism industry in order to identify any possible unique selling points (USPs) Scotland might have as a salmon angling destination. The final results will point towards further areas of research and will help create a platform for the planning and development of more focused marketing strategies by recreational fishing destination managers and enable improved delivery of the recreational fishers' goals.

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CHAPTER ONE

INTRODUCTION

INTRODUCTION

Recent years have witnessed an unprecedented development in the international tourism industry, driven in large part by advancements in computer related technology which has also enabled better/faster communications and simplified information search capabilities and transport infrastructure developments (such as budget airlines and improved airport accessibility) that have made tourism more affordable to the masses. Changes in people's lifestyles, including an increase in disposable income and free time, earlier retirement and longer life expectancies are now synonymous with a higher propensity to travel (Page: 2006). These factors, coupled with a demand for special interest and active holidays, have resulted in a global increase in nature based tourism in general and international fishing tourism in particular (Borch et al: 2008).

Angling, especially fly fishing for game fish (salmon and trout), is an activity that in Scotland has a very long history and strong tradition. In fact Scotland is seen internationally as the home of Atlantic salmon fly fishing, with many techniques being originally developed there (VisitScotland: 2011). Many of the techniques are even to day the mainstay of salmon fly fishing (floating line fishing, the Single Spey Cast and the Double Spey Cast, for example). Similarly, many of the flies still used to catch Atlantic

salmon throughout the world were invented and developed in Scotland. This tradition of innovation in the field stretches right back to the Victorian era (Holdsworth: 2011).

The angling industry in Scotland is therefore a well established, rural industry with over 150 years of tradition. Most of the fishing takes place on the 350 rivers that are said to contain salmon populations (Malcolm et al.: 2010). Fishing is also available over a long season that runs from 11 January to 30 November, inclusive. However actual season times vary from river to river, within this period.

As a species, Atlantic salmon are seen to be under threat in world terms and although their natural range within Europe is from Spain to the Kola Peninsula, in Russia, many countries have very limited, and often declining, populations. At present around 90% of the healthy Atlantic salmon populations are now restricted to the four countries of Norway, Ireland, Iceland and Scotland (WWF: 2001, p. 6).

The tourism industry is one of the Scotland's primary exports and is a major contributors to the Scottish economy with approximately £5.2bn being generated annually (Deloitte: 2008). However, at the moment, angling as a tourism activity in Scotland is seen as being significantly underexploited (Radford: 2009) and there is therefore potential for growth and development that could contribute to the national strategy of a 50% increase in tourism revenue by 2015 (VisitScotland: 2008).

Angling should not be viewed as one homogenous industry, as Shafer (1969) states - an average angler does not exist. In Scotland, anglers are generally segmented into game, coarse and sea anglers but there are also subsets within those segments as well: e.g. anglers who fish for certain species only, such as salmon anglers. This research will concentrate on the subset of salmon anglers. It should also be noted that throughout the paper the word "salmon" is used and should be read to mean "Atlantic salmon". Similarly the words "fishing" and "angling" are used and these should always be taken to mean fishing with rod and line, unless otherwise specifically stated.

Through the use of a questionnaire, it is the aim of this research to identify the demographic characteristics of non resident salmon anglers who come to Scotland to fish. It will do this by investigating, their behaviour in terms of planning and booking their trip, their motivations and deterrents, how the holiday was marketed to them and their views on their holiday and the fishing industry. Through this effort it is hoped to identify any possible Unique Selling Points (USPs) Scotland might be able to offer as a salmon angling destination. Finally the results of this research will point towards further research and help create a platform for the planning and development of more focused marketing strategies by recreational fishing destination managers, thus enabling improved delivery of the angler expectations.

Before presenting the results it is important to provide an introduction to the relevant issues and to allow the final results to be viewed in context. With this in mind, Chapter

Two explores the background research presently available from a global perspective with regard to angling from a participation, motivation and satisfaction viewpoint. In Chapter Three the discussion is narrowed down to the Scottish perspective and explores the industry in general as well as the economic, social and ecological impacts relating to salmon fishing. The methodology is outlined and justified in Chapter Four with strengths and weaknesses identified. The findings are presented and analysed in Chapter Five with conclusions and recommendations arising from findings being presented together with recommendations for the industry and suggested areas of further research in Chapter Six.

CHAPTER TWO

LITERATURE REVIEW

LITERATURE REVIEW

2.1 BACKGROUND

The following literature review aims to provide both background information and a critical evaluation regarding academic studies that address the social aspects of angling, most notably the understanding of angling motivation and participation as this research focuses on the social aspects of salmon angling tourism. However, there are other aspects (e.g. the economic and environmental impacts of angling) that are just as important in order to fully understand angling tourism and these will be discussed in the following chapter.

Research interest in angling motivations arose in the 1970s with the work of Bryan (1977), whose efforts were instrumental in the early stages of development of this academic area. Carrying on from Bryan's early work, Ditton (1989, 1992, 2002), Fedler (1986, 1994, 2001), and Graefe (1980, 1986) became the leading specialists in angling motivation and participation research, contributing significantly to the available body of knowledge. Research regarding angling motivation and participation is an important subset of angling tourism research. It is of special interest to natural resource managers and policy makers because it helps to segment the angling population and this enables

the creation of focused marketing strategies and products. This activity in turn aids in natural resource planning and development at recreational fishing destinations.

Various frameworks have been employed in angler segmentation efforts based on demographics, fishing mode and species sought, specialisation and consumptive (= harvest) orientation. To date, it is unclear which framework is most appropriate with regard to tourism destination marketing. The concept of place attachment is also an important research area as it endeavours to understand location bonding and therefore loyalty to specific angling destinations.

2.2 PARTICIPATION STUDIES

Participation studies examine how different demographic characteristics such as age, gender, ethnicity, socio-economic status and place of residence (Cessford: 1987, Wilde et al: 1998, Fedler & Ditton: 2001, Floyd et al: 2006) influence angling participation. Most academics agree that the angling population is largely characterised by an over-representation of males and older individuals. Cessford (1987) maintains that in comparison with other recreationists, anglers tend to be married and involved in family commitments, have higher education levels and a higher proportion of retirees relative to the general population and are also over-represented by professionals, managers and individuals active in sales and service pursuits. Rural upbringing also has a positive effect on participation among (American) anglers (Cessford: 1987). The above studies

mainly relate to North America, but it is highly likely that the results are similar across the world.

Constraints to participation in angling have been examined as well. Research shows that constraints to angling participation also relate to demographics. Constraints are dynamic and tend to vary with the human life-cycle (Miller & Vaske: 2003). Researchers (Fedler and Ditton: 2001, Floyd: 2006) also contend that people from non-dominant groups such as women and ethnic minorities face greater leisure constraints. It should be noted that the effect of demographic characteristics on angling participation can also vary significantly depending on the type of fishing (Wilde: 1998, Fedler and Ditton: 2001). Miller and Vaske (2003) maintain that social demographics have much less predictive power in regards to angling participation than do psychological constructs such as motivations, as developed below.

2.3 MOTIVATION AND SATISFACTION STUDIES

Insight into angler motivations is an important step towards 1) explaining and predicting angling behaviour and 2) interpreting how motives differ in varying situations and angler groups (Fedler and Ditton: 1986). Understanding motivation helps fishery managers to develop angling products and services more effectively (Driver: 1985). As motives are intrinsically related to expectations and therefore satisfaction, improperly understanding or ignoring motives could cause fishery managers to overlook key business opportunities or result in the expectations of their initiatives being unfulfilled.

On the other hand it should be noted that there is a large margin of error in motivation research: answers that anglers provide on research questionnaires do not have to necessarily correlate with actual behaviour in 'real life' situations (Fedler and Ditton: 1994). In research it may be therefore better to compare motivation and satisfaction results with those of actual behaviour.

Recreational angling is clearly not motivated by the need to satisfy Maslow's (1970) basic needs for food and sustenance (Killion: 2006). Why people fish has been a subject of interest for centuries (Fedler and Ditton: 1994). In the past four decades various studies of angling motivation have increasingly focused on the catch aspects of angling. As Matlock et al. (1988) said, "We must not forget that the first word in fishing is fish." Having said that, most studies suggest that there are other dimensions to the angling experience besides catching fish (Hendee and Bryan: 1978, Fedler and Ditton: 1986/1994, Calvert: 2002). Bryan (1974) in fact contends that the harvest aspects of fishing are of relatively low importance. His findings however were based on the erroneous assumption that anglers form a homogenous group. As Shafer (1969) points out, the 'average angler' does not exist and as this literature review progresses it will become apparent that anglers indeed comprise quite a heterogeneous group.

Earlier angling motivation research was based on the work of Knopf et al. (1973) who suggested that anglers are motivated by four main factors: temporary escape, achievement, exploration, and the experience of natural settings. More recent studies

use different variables to characterise and understand the scope of angling motives. Calvert (2002) summarised angling motivation based on studies of various academics in Figure 1 below. It has to be noted, however, that this chart misses out other possible motivations such as peer esteem, reward (e.g. financial) and availability of free time and affordability.

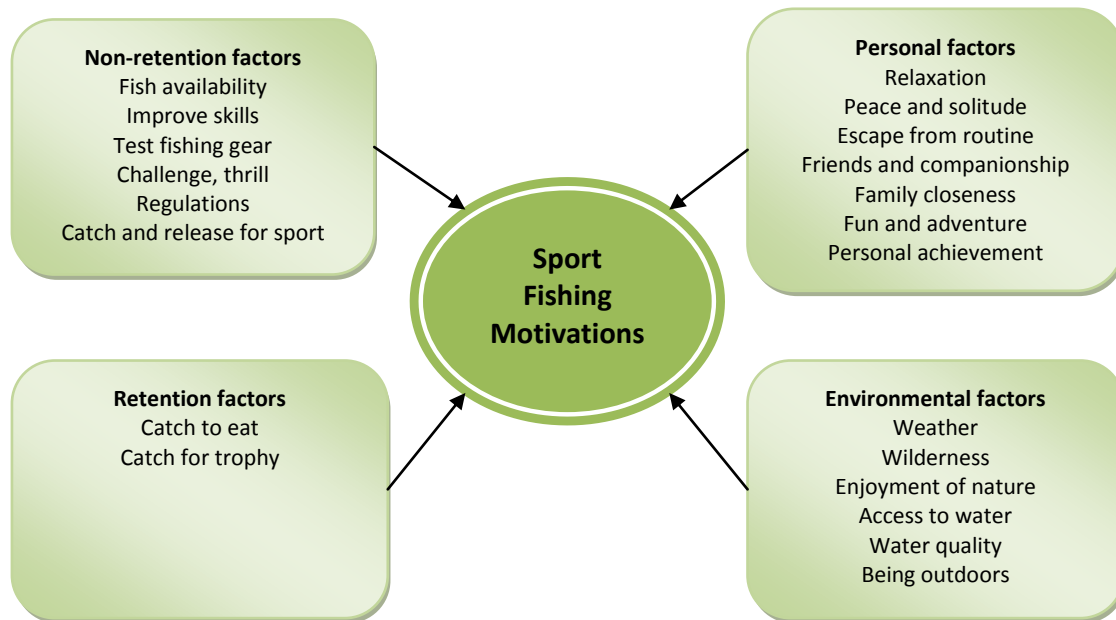


Figure 2.1 Motivations for sport fishing (Calvert: 2002)

Anderson (2005) divides motives into catch-related variables which are unique to recreational fishing, and non-catch-related variables which are similar to those associated with general outdoor recreationalists. Catch related variables include *fishing mode and species sought* (Manfredo and Anderson: 1982, Fisher: 1997, Killion: 2006), *specialisation and experience* (Bryan: 1977, 1979, Chipman and Helfrich: 1988, Dawson et al.: 1992, Ditton et al.: 1992, Oh and Ditton: 2006) and *consumptive orientation*

(Fedler and Ditton: 1986, Matlock et al.: 1988, Ditton and Fedler: 1989, Aas and Kaltenborn: 1995, Arlinghaus and Mehner: 2006, Kyle et al.: 2007). Literature that addresses non-catch-related variables is mainly concerned with *place attachment* (Stokols and Schumaker: 1981, Korpela et al.: 2001, Williams and Vaske: 2003, Hammit et al.: 2004).

The majority of angling motivation and satisfaction research has been conducted in North America and only a small number of studies have focused on comparing and contrasting angler behaviour and preferences across other countries and cultures. Aas and Kalteborn (1995) noted that comparing studies is quite complicated because of variations in research instruments, objectives and specific situational conditions. In their work, Aas and Kaltenborn quoted the research of Haworth (1983) who found differences when comparing his results for British anglers to North American angler research results. A major difference was noted in terms of the importance of escapism as an aspect of motivation and Haworth noted that this difference could be cultural. Other studies (Duda et al.: 1998, Fisher: 2009) showed that fishing motivation and behaviour differed strongly among anglers from various ethnic/cultural backgrounds (Whites, African-Americans, Hispanic).

2.4 FISHING MODE AND SPECIES SOUGHT

Numerous studies have focused on sub-population groups such as tournament anglers (Wilde et al.: 1998, Killion: 2006), boat anglers (Dawson and Wilkins: 1981), specific

location anglers (Cessford: 1987, Chipman and Helfrich: 1988, Dawson: 1992) and species sought (Bryan: 1977, Arlinghaus and Mehner: 2003, Killion: 2006), among others.

A literature search for studies directly comparing motivations and satisfaction of game fishing, coarse fishing and sea fishing anglers generated little in the way of results aside from a few exceptions (Fedler and Ditton: 1994, Kyle et al.: 2007) that compared fresh and salt water fishing to a limited degree. This is perhaps because most researchers tend to group different types of anglers together or focus on a very specific type of angling.

It might be expected that non catch related motivations such as enjoyment of natural settings, escape or being with friends would be somewhat similar across all types of fishing modes (Anderson: 2005). However it would be interesting to compare catch related motivations among game/coarse/sea anglers where differences are more likely to exist. It may be that research is scarce in this area of interest because there are also subgroups within each of the fishing modes depending on specialisation and experience which might provide better insight into angling motivations.

2.5 ANGLING SPECIALISATION AND EXPERIENCE

Examining angler motivation and behaviour based on specialisation could be very useful in fishery management decision making. The concept of angler specialisation was

initially proposed by Bryan (1977, and 1979). He defined it (1977) as “a continuum of behaviour from the general to the particular reflected by equipment and skills used in the sport and activity/setting preferences.” He stated that there are four basic types of anglers: 1) the occasional angler of novice ability for whom fishing is not a regular activity; 2) the generalist angler interested in catching any fish in any environment by any legal method; 3) the tackle-species specialist who specialises in the method and 4) the method-species-setting specialist who is more committed to and concentrates on specific techniques (e.g. fly fishing), species (e.g. salmon) and settings (e.g. rivers).

A number of academics (Dawson et al.: 1992, Ditton et al.: 1992, Oh and Ditton: 2006) agree that as angler specialisation increases, emphasis shifts from consumption to appreciation for other aspects of fishing such as conservation and natural settings. Similarly, less specialised anglers, who tend to take a more superficial approach to their activity, are also more harvest orientated and less appreciative of the social, psychological and environmental aspects of angling (Chipmand and Helfrich: 1988). Fedler (1994) argues that rather than attempting to slot anglers into particular species groups or fishing modes, the specialisation continuum is a better indicator of variability in angling motivations.

2.6 CONSUMPTIVE ORIENTATION

Consumptive orientation has been used as a tool for angler segmentation since the 1980s. Graefe (1980) defined consumptive orientation as the attitude anglers hold

towards catching fish including catching something, retaining fish (as opposed to releasing), catching large fish (size) and catching large amounts of fish (numbers). Fedler and Ditton (1986) determined that the vast majority of fishery managers, however, believe they manage fish and not anglers, thus angler segmentation in regards to motivation and other psychological elements has not met with a great deal of enthusiasm among them.

While the presence of fish and a good possibility of catching at least one is an essential aspect of any angling experience, research on consumptive orientation shows that the emphasis on catching a fish differs among anglers. Graefe and Fedler (1986) argue that consumptive orientation has more explanatory and predictive power than any other angler segmentation framework because their research indicates that 'catch' has a bigger impact on angler satisfaction than any other experience dimension.

A number of diverse frameworks have been created to measure consumptive orientation. Most of these work along similar lines as they build on the previous work of other academics (Graefe: 1980, Fedler and Ditton: 1986). The multi dimensional scales generally divide anglers into four groups: 1) retaining/releasing fish; 2) number of fish caught; 3) catching large trophy fish and 4) catching something/nothing (Anderson: 2005, Kyle: 2007). A differing concept has been created by Aas (1995) and divides anglers in regards to the strength of their harvesting orientation (i.e. low, medium and high). The major benefit of these frameworks is that they provide preference oriented

profiles for angling market segments that could be used as platforms for developing materials to promote angling based tourism destinations (Kyle: 2007).

2.7 PLACE ATTACHMENT

The meanings and preferences that some people associate with specific recreational environments have been of academic interest for the past 20 years. Some of the research in this area is endeavouring to move beyond viewing these characteristics as a collection of physical attributes that create specific recreational experiences (Hammit et al.: 2004). In recreation, some people typically become well informed, comfortable and thus loyal to a specific location and its resources and show reluctance to try different, alternative locations (Korpela et al.: 2001).

The body of literature addressing place attachment tends to consist of two major constructs: 1) place identity and 2) place dependence (Williams and Vaske: 2003). Place identity refers to “the symbolic importance of place as a repository for emotions and relationships that give meaning and purpose to life” (Williams and Vaske: 2003). Place dependence is related to reliance on the functionality and physical attributes that allow desired activities (Stokols and Shumaker: 1981). An individual’s awareness, place familiarity and personal experience, knowledge of alternative places, travel, accessibility and other attributes specific to the place play an important role in place dependence (Stokols and Schumaker: 1981). Place attachment or bonding research has shown that individuals who rate highly in the constructs mentioned above can be quite predictable

in their behaviour, thus such research can be beneficial to the planning efforts of recreational resource and destination managers (Hammit et al.: 2004).

2.8 FUTURE RESEARCH

While there is a wealth of information concerning why anglers fish in general, a search for studies addressing the motivations of visiting anglers yielded no results. The key question to be asked in this regard is why anglers leave their local fishing resources and travel (sometimes) considerable distances to fish elsewhere. There is very little known about angling from a tourism perspective (Stensland: 2010). Much has been written about recreational fishing in general, a significant amount of which has relevance to tourism, (e.g. motivations and attitudes, environmental and economic impact), however aside from a few notable exceptions, (Roehl et al.: 1993, Holland et al.: 1998, Fennell: 2000, Ditton et al.: 2002, Chen et al.: 2003, Borch: 2004, Zwirn et al.: 2005, Borch: 2008, Stensland: 2010), only a small percentage of this literature actually directly focuses on angling as a tourism activity. As the number of tourists travelling internationally for recreational purposes such as angling increases, this topic will become even more relevant in the near future.

CHAPTER THREE

SCOTTISH ANGLING INDUSTRY

SCOTTISH ANGLING INDUSTRY

3.1 ANGLING INDUSTRY BACKGROUND

The importance of tourism as an industry is considerable because it has the ability to generate foreign exchange earnings, income and employment and it has become a popular addition to economic development policies in many countries (Page: 2007, p. 389). For these reasons, the impact of angling tourism tends to be largely measured in terms of economic value. Although angling tourism is a commercial (and thus a financial) activity, other aspects of the angling experience are just as important and must be duly considered. When anglers purchase their holidays in Scotland they anticipate certain expectations as regards their experience, such as the pristine scenery, clean environment, escape from the din of civilization, peaceful solitude and Scottish culture. Cheong (2003) identifies these as non-purchased elements that angling tourism heavily relies on (and that are invaluable) as well as relying on public sector services such as infrastructure and transport.

Chadwick (1994) identifies several tourism related terms, some of which have relevance when discussing angling tourism. The European Charter on Angling and Biodiversity (2010) defines angling tourism as “angling conducted by anglers who may sometimes

travel considerable distances from their home and/or own angling areas, and often abroad, in order to visit other areas to angle”.

Although we describe tourism as an industry, it is actually a conglomerate of several industries that care for the needs of tourists yet do not exist solely for the tourist trade (Page: 2007, p. 93). Convenience stores or petrol stations for example may cater to tourist needs, yet they can hardly be classified as tourism businesses. The network of the ‘unified’ tourism industry tends thus to be divided into (1) the tourism industry and (2) the tourism-related industry (Page: 2007, p.93).

Similarly, when trying to define the recreational fishing tourism industry we have to look at various sectors. Some providers are specific to the angling tourism industry while others cater for other (more common) parts of the tourism industry (Figure 2).

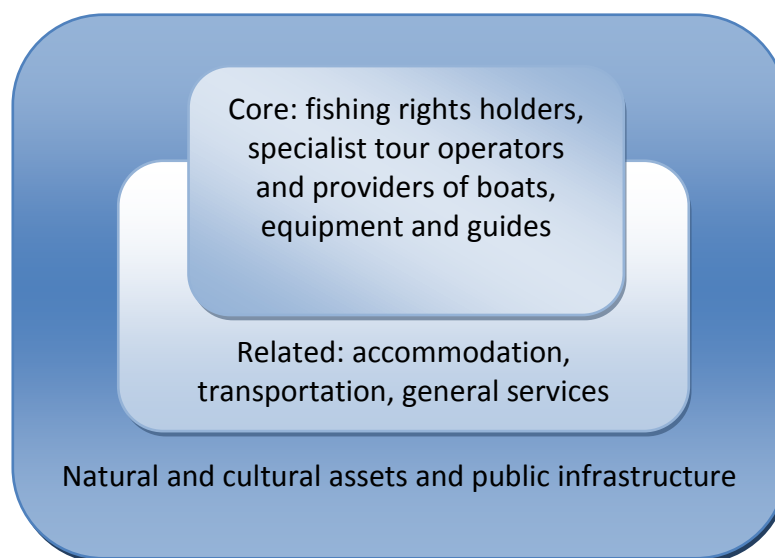


Figure 3.1 Core and related elements in the fishing tourism industry (Aas: 2008)

The core of fishing tourism consists of fishing rights owners, fishing ghillies (guides), the charter boat industry, fishing tackle retailers, tour operators specialising in recreational fishing products and fishing travel media production (TV, DVD, magazines). The industries that are related to angling include accommodation providers, restaurants, retail stores, transport companies (airlines, ferries, car rentals), petrol stations, tourist information providers (visitor information centres, brochures, travel books), and other attractions and activities in the area (Ditton et al. 2002). Both core and related elements of the angling tourism industry can have dramatic impact on the angling holiday experience.

Borch (2004) argues that there is continued development of commercialisation in fishing tourism. There are angling tourists who purchase entire 'fishing packages' that encompass not only fishing permits and licenses but also accommodation, transport, boat hire, fishing guide and sometimes fishing equipment hire as well. There are also independent tourists who book all of these elements by themselves. However, legal and physical access to angling in some locations will have an effect on the possibility of doing so (Borch: 2004).

There are numerous activities in which tourists may want to participate whilst on holiday. A change in fishing locality per se is not the only reason for which anglers travel. Chen et al. (2003) defined other factors such as variety in quality of angling (e.g. size and number of fish caught and diversity of species) as being of major importance.

As anglers travel cross-culturally, they also introduce different angling preferences and expectations. Such variety in demand can have an impact on the management efforts of angling holiday providers in terms of the development of angling holiday products and offerings, marketing communications and distribution channels.

On a macro basis, angling holiday experiences are primarily segmented into fishing in freshwater (in rivers, canals, ponds and lakes) or in the sea. Angling tourism can encompass fishing from a boat or bank, fishing often with the assistance of a ghillie or in a tournament. Several other segmentation sub-divisions are also possible (such as fly fishing versus coarse fishing, etc.).

The fishing experience may be significantly affected by various regulations. Borch (2008) identified a number of legal regulations relating to equipment limitations (use of barbless hooks, artificial bait or fly fishing only), protected species or areas, open days and times, number of fishing licences sold, number of fish kept, catch and release, tag and release (tagging all released fish), compulsory catch reports, ban on utilisation of live bait, etc. In addition, fishing tourism operators may have their own policies regarding licences, boat utilisation and bag restrictions.

These regulations / policies can differ at both international and national levels and there may also be differing rules for domestic (resident) and visiting anglers (Borch: 2008). According to Cheong (2003) some governments have adjusted country specific

regulations to accommodate the needs of international anglers and thus aid the development of angling tourism. In any event, it is clear that legislative framework has an effect on both the establishment of angling tourism businesses as well as limitations on the product offerings but, as Borch (2008) argues, this effect can aid in enhancing the overall quality of the fishing experience. This in turn will have an effect on the appeal of the location as a fishing destination, the number of anglers who choose the destination and thus the revenue generated by this tourism market segment.

3.2 ECONOMIC IMPACT OF ANGLING IN SCOTLAND

From an economic point of view, angling in Scotland is one of the most important recreational activities in the country. There have been several very mixed and sometimes quite contradictory reports as to how much money angling actually generates for the Scottish economy. According to Radford's economic analysis of sea fishing in Scotland (2009), the total expenditure for this type of fishing alone is around £141m per annum, which is almost as much as golf generates. Expenditure for game (salmon and sea trout, rainbow and wild brown trout) and coarse angling (mainly pike and carp) is £113m in total (Radford: 2004). This can be compared to Mackay Consultants' estimate of £54m (1989). Because reports differ significantly from one another, some individual salmon rivers compiled their own research, again with varying (generally higher expenditure) results e.g. Spey report (Butler et al.: 2009) or Tweed Report (Macdonald: 2006).

Focusing on the salmon angling segment of the industry, the total expenditure is said to account for around £74m per annum (Radford: 2004), with individual angler daily expenditures being well above the national tourist average of £57 (VisitScotland: 2007). An average Scottish salmon angler spends around £101 per day, in comparison with the non-Scottish visiting salmon angler who spends around £190 (Radford: 2004). Due to this expenditure difference, the latter group represents a relatively untapped resource for potential income derived from foreign exchange earnings. Marketing to this segment would coincide with VisitScotland's national tourism strategy which endeavours to attract higher spending customers. Having said that, there is relatively little spent on the promotion of the Scottish angling industry both within and outside of Scotland and that is perhaps something that could be improved upon.

It should be noted that measuring angler expenditures (amount and what it includes or excludes) is a complicated matter and is perhaps the underlying reason why so many economic assessments show very divergent figures. For example, as Radford noted in his research (2004, 2009), anglers' companions tend to represent relatively high expenditures on non-angling items whilst on holiday in Scotland, however many economic assessments do not count this source of revenue in the total angler expenditure figure. In addition, the economic impact of angling cannot simply be viewed in terms of total angler expenditure (also called direct expenditure) but should include the indirect and induced effects related to this direct expenditure. The direct expenditure represents angler spend on fishing permits, transportation,

accommodation, boat rental, guide hire etc.. Indirect effects come from the expenditures of those fishing service providers on employee salaries or payments to suppliers. Induced effects encompass the additional income that comes from spending within the tourism destination such as consumption by the aforementioned employees (Page: 2007, p. 396).

Benefits to the local community of both types of expenditure are calculated using a multiplier that estimates how much of this income circulates in the local economy versus how much of it leaks out through the purchase of imported goods and services etc. With regard to salmon angling in Scotland, the multiplier generally tends to be greater than in other types of fishing because of the higher levels of local labour content from ghillies and workers in hotels and restaurants (Radford: 2004) associated with this angling market segment.

Among many other benefits of utilizing economic assessments, is that it makes it possible to compare industries, an important consideration for interested parties when lobbying for funding and investment for further development of the industry. Some economic impact assessments, especially those with an agenda of trying to boost a particular area or activity, can present more optimistic estimates, hence the differences in numbers.

3.3 ECOLOGICAL IMPACT OF ANGLING IN SCOTLAND

Recreational fishing has contributed to other consequences aside from those related to economics. Lewin et al. (2006) identified a number of mainly local (yet significant) and largely negative side effects of recreational fishing, such as noise pollution and wildlife disturbance, habitat modification, bait harvesting and the loss of terminal tackle.

In addition to the aforementioned local side effects, a number of other environmental consequences of recreational fishing have been of global significance. Both commercial and recreational activity puts pressure on fish populations (Post et al: 2002) and can potentially cause a global decline in fish availability or certain fish species. Aquatic ecosystems tend to be affected by the selectivity exercised by anglers – not only for specific fish species but also for fish size, age and sex (Lewin et al: 2006). The practices of stocking native fish or the introduction of non-native fish species have been used globally to maintain or increase fish populations. Until recently, however, little consideration was given to the often irreversible effects on native species and potential changes in entire eco-systems that these practices can initiate (Cambray: 2003). Research has shown that stocking has led to the extinction of local wild fish populations, be it because it was hunted by predatory non-native species or because of diseases and parasites introduced into the ecosystem by the stocked fish (Lewin et al.: 2008). Stocking can also lead to changes in the plankton link of the food chain that provides nutrition for other local species (Lewin et al.: 2008).

Recent years have witnessed an increase in the number of environmental agencies in Scotland that deal with (potential) problems that fishing in general and recreational fishing in particular can bring. For salmon angling in Scotland, there is already a general trend in sentiment towards the practice of catch and release, which is perhaps the most sustainable way of fishing.

3.4 SOCIAL IMPACT OF ANGLING IN SCOTLAND

Relatively little academic literature has been written to explore the cultural aspects of angling. The reason is perhaps that angling does not garner as much media coverage as mass participation sports such as football and rugby (Brown et al.: 2009) and therefore tends to be absent from the public eye. Broad claims have been made about angling's benefits to society, be it anything from the betterment of personal wellness (health and relaxation) to the provision of income and jobs and improvement of the environmental state (Brown et al.: 2009).

There is currently a movement in Scotland to attempt to use angling to address some of the social problems of today's youth. Through the *Get Hooked on Angling* project, angling has been added to the Scottish Government's educational and well-being strategies to reduce the number of youngsters who are on the street - those not enrolled in formal education, gainfully employed or in vocational training - as well as to encourage general wellness.

CHAPTER FOUR

METHODOLOGY

METHODOLOGY

The economic significance of anglers who visit Scotland to fish for salmon has been discussed in previous chapters. In spite of this significance only three studies, commissioned by VisitScotland, concerning this subject have actually been completed to date (2004, 2005 and 2007). The primary focus of each of these studies however was a quantitative representation of the indigenous UK market thus a knowledge gap continues to exist in both qualitative information regarding angler perceptions and quantitative information regarding non-Scottish anglers who visit Scotland to fish. This is perhaps the case because angling continues to be perceived as a relatively niche market despite the fact that the aforementioned reports clearly indicate that the market is not as small as it may seem. It would therefore be worthwhile to gain a more thorough understanding of how anglers perceive Scotland as an angling destination.

This research study utilised a three step approach. Firstly, background research was undertaken to develop a fundamental understanding of the angling industry in Scotland. Secondly, an online survey was conducted using a variety of distribution channels to reach as many appropriate potential respondents as possible. Lastly, consultation with angling industry leaders was carried out to gain insight into the underlying issues of fishing as a recreational and tourism activity in Scotland that would aid the analysis of the responses.

4.1 RESEARCH OBJECTIVES AND RESEARCH METHOD

This study comprises both quantitative and exploratory research in an effort to create a foundation of information into the visiting angler market, which might subsequently serve as a viable basis for further research. The online survey questions (the primary tool in this study) were focused on assessing non-resident angler *demographics* and the *perceptions* of these anglers about salmon fishing in Scotland. A more detailed look at the specific objectives the survey was formulated to accomplish is as follows:

RESEARCH OBJECTIVES

- To identify the demographic characteristics and profile of non-resident anglers
- To examine their behaviour with regard to planning and booking the angling trip
- To investigate the non-angling aspects of their angling holidays
- To identify their motivations and deterrents regarding salmon angling in Scotland
- To determine the initial inspiration for visiting Scotland to fish for salmon
- To assess perceptions of their salmon angling holiday experience and the angling industry in Scotland

The aforementioned research objectives were a decisive factor in determining whether to use quantitative or qualitative research in this study. Due to the mix in the types of

information being sought, both quantitative and qualitative questions (in the form of open-ended questions) were eventually included in a self-administered online survey.

Qualitative research is essential in order to develop an in-depth understanding of visiting angler views on Scotland as a salmon angling destination while quantitative data supplemented this research by providing background information about the demographics of the visitors. According to Chisnall (1997) the combination of both information gathering techniques is viewed as the most desirable approach in such studies as it adds strength to the credibility of the research results.

4.2 ADVANTAGES

Utilisation of an online survey was deemed to be the most logical avenue for gathering responses for a number of reasons.

Firstly, as this study is aimed at anglers who reside outside of Scotland, an online survey conveniently enabled hundreds of potential participants who are geographically spread around the world to be reached quickly and economically. As Kent (2007) noted, international boundaries have no significance when it comes to online surveys. While this study was constrained by a time limit, the online survey essentially negated this as a possible issue since potential respondents could be reached and respond within minutes. This should be compared to, for example, a postal survey that might have

taken weeks for responses to be gathered. In addition, except for purchasing an online survey package, there was almost no further financial consideration involved. Cost is perhaps the most relevant issue faced by researchers when contemplating a study that is international in nature.

Secondly, self-administrated questionnaires minimize time pressure on participants by providing the opportunity for them to complete the survey at their own leisure and to take virtually as much time as they need. As such, they have more time to think about their responses and can thus provide much better quality input, particularly with respect to qualitative questions eliciting written responses. They can also respond literally at any time of the day on any day of the week. Having the possibility to complete online surveys in the privacy of their homes, participants are also more likely to respond openly to sensitive issues, without distraction or feelings of embarrassment.

Absence of an interviewer's presence during the administering of a survey can also be viewed as an advantage as it removes any possible interviewer bias. At the same time the researcher maintains a degree of control over the survey as the response rate can be easily monitored online and current results can be accessed at any time.

4.3 DISADVANTAGES

No research technique is without shortcomings and even online surveys confront the researcher with certain disadvantages. When these disadvantages are understood, however, steps can sometimes be undertaken to minimize their potential effects where possible. One of the main disadvantages with web-based surveys is the fact that not all groups of people have access to the web and thus cannot be represented within the sample frame. Fortunately for this study, as VisitScotland research (2007) indicates, anglers are major consumers of information and the web has become one of the most popular information search tools used by this group.

Another issue with self-administered surveys is that the researcher has little if no control over how it is being completed. Without the presence of an interviewer it is not possible to prevent respondents flicking through the questions before answering them which could have a detrimental effect on the final results of the survey. In addition, there is little help available to participants if they are in need of any clarification. Should a self-administered questionnaire take more than 10-15 minutes to complete, respondents may lose interest or concentration, submitting the survey either incomplete, or in case of open-ended questions, responding with answers that are too short to be of real value. The researcher attempted to minimize this potential control issue by offering an incentive that would encourage anglers to participate and to answer the compulsory questions (most of the survey questions) in order to qualify for the

incentive. Those participants who answered all compulsory questions were able to progress through each page of the survey to the very end and leave their email address which would then be entered into a prize draw for a £100 FishPal fishing voucher.

4.4 QUESTIONNAIRE DESIGN

A key design requirement for the questionnaire was that it be easy to complete and clear enough to understand to enable effective self-administration. It was also essential that it be brief and contain thorough instructions, all in simple wording to ensure that the needs of non native English speaking participants were taken into consideration.

Kent (1993) identifies three types of questions, all of which were used in the survey and are as follows:

- *Classification questions* - to compare and contrast how respondents differ from one another. They provide a profile of the respondent - including basic demographic information (e.g. angler age, gender, employment or nationality) to determine if certain groups dominate the sample/survey population. Multiple choice questions requiring single answers were used mainly for this purpose.
- *Behavioural questions* - to provide factual information on what the respondents are, do or own and how they determine their actions (e.g. how anglers book and plan their trips, how often they go on angling holidays, etc.). Multiple choice

questions with single/multiple response textboxes were used to assess angler behaviour.

- *Attitudinal questions* - relate to people's opinions and beliefs about specific products or companies. Attitudes and opinions represented an important part of the questionnaire because these elements are motivational indicators and can assist in predicting likely purchasing habits. Favourable or unfavourable attitudes affect the way people react to situations and thus to their purchase decisions related to those situations (e.g. angler attitudes to fishing in Scotland, why they go to Scotland and not elsewhere). Likert scales, rating scales and textboxes for open-ended questions were used in the questionnaire to identify attitudes and opinions towards specific aspects of angling holidays. In comparison with behavioural or classification questions which record facts, answers to attitudinal questions require interpretation.

In an effort to encourage anglers to complete the survey, the questionnaire was designed such that the behavioural and classification questions appeared first and could be completed quickly and easily while open-ended questions and likert/rating scales were located towards the end.

4.5 PILOT

Piloting the survey was an essential step in the research methodology in order to identify and correct any errors that might adversely affect the study results. Piloting helps to uncover potential issues related to wording or question content, survey structure or irregularities in the instructions, and to ensure the survey is not too long.

The first step in the pilot was to conduct unstructured interviews with industry professionals to identify any flaws in the wording or content of the questionnaire. The revised draft survey was subsequently sent to a limited number of close contacts who are members of the survey population.

As expected, the pilot phase resulted in minor changes to the original questionnaire. Some questions and the initial instructions were revised for clarity and other questions were adjusted to make them more relevant to the topic, while the number of questions was decreased to reduce completion time.

4.6 SAMPLING

Identifying the sampling frame in this study with a high degree of accuracy is not feasible as there is no publicly available list with email addresses of non-resident anglers who fish in Scotland. In addition, the response rates of internet based surveys are known to be very low. According to academics (Kent: 1999) a minimum of 100 responses is required for any quantitative survey to be statistically significant. On this

basis, the researcher established that 100-150 responses would be sufficient for this particular study.

In support of the response target, a number of both public and private sector bodies within the angling tourism industry were contacted to post the survey link on their websites and also distribute it via email to their e-newsletter subscribers. In addition, the link was posted to a number of angling forums, both British and international. The distribution channels for the survey included (to name but a few): Fishpal.com, Salmon and Trout Association, Scottish Country Sports Tourism group and web-based forums such as salmonfishingforum.com, flyforums.co.uk, salmo.proboards.com, troutandsalmonfishingforum.com. The researcher believes that the selected distribution channels were diverse enough to provide a representative sampling of the angling population thus enabling a broad range of opinions to be voiced.

4.7 RESEARCH ANALYSIS

The survey was available for completion over a six week period, during which 159 responses were submitted. Of this number, 123 were deemed usable. The unusable responses were submitted primarily by anglers who, despite survey instructions, did not fit the target research population (they were residents in Scotland or had not fished for salmon in Scotland in the past).

Once all the responses were received, the quantitative portion of the survey was run through the statistical analysis software programme SPSS. Qualitative data analysis was conducted by identifying key answer phrases and looking for recognizable patterns in the appearance of these phrases.

The results of the survey are shown in the following chapter.

CHAPTER FIVE

ANALYSIS AND FINDINGS

ANALYSIS AND FINDINGS

123 usable survey responses were collected over a six week period from the last week of January through the first week of March 2011. Four weeks into the planned survey time period, 99 usable responses had been received and potential respondents were again prompted to participate in the survey before the expiry date, subsequently generating a further 24 responses.

The number of male survey respondents was far greater than the number of female respondents which supports prior research studies that determined that angling is largely a male dominated activity (Anderson: 2005).

5.1 DEMOGRAPHIC CHARACTERISTICS

As Figure 5.1 indicates below, 95.3% of the visiting anglers live within the EU/EEA, most of whom (84% of the total) live in England, Wales or Northern Ireland. This data suggests that the vast majority of anglers choose Scotland for salmon fishing at least in part because of travel convenience and the fact that they are able to communicate in their mother tongue while on holiday, both factors of which help to create a more relaxing holiday experience. The latter point, with respect to English language communication, could also be a contributing factor for the 2% of respondents who live in the USA.

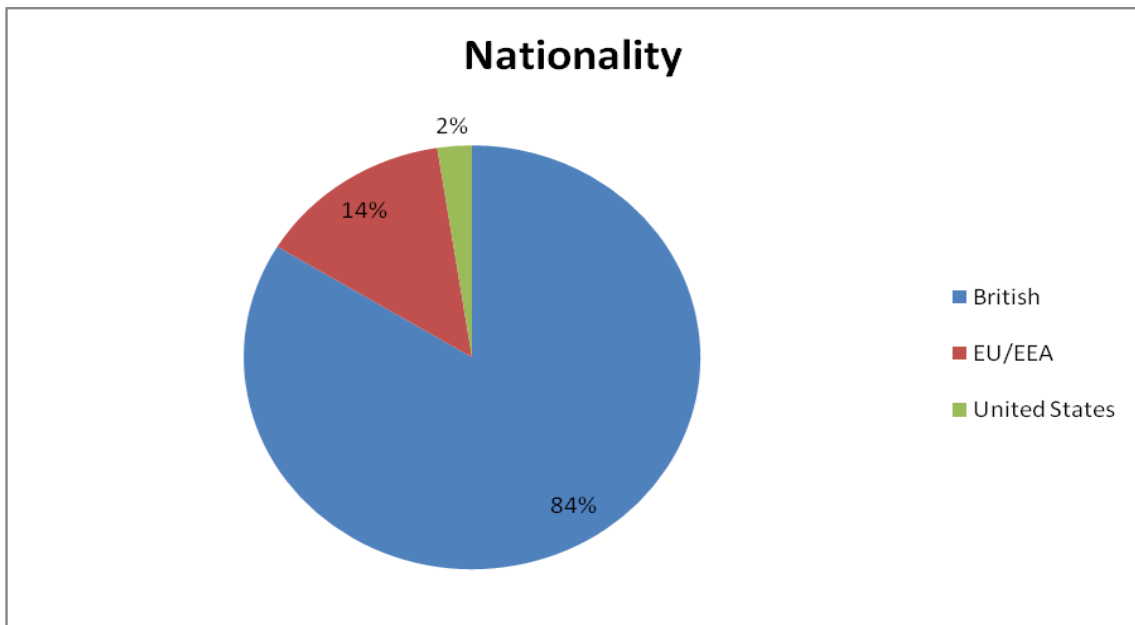


Figure 5.1 Nationality of visiting anglers

Age data for respondents (Figure 5.2) shows that salmon angling in Scotland is clearly dominated by mature adults with 74% appearing in age groups 45 years old and above. As individuals in the lower age brackets are of an age that they would likely be preoccupied with career development and / or raising young children, the data suggests that the majority of salmon anglers have achieved enough financial success and / or familial freedom to indulge in angling holidays (which tend to be additional to family holidays).

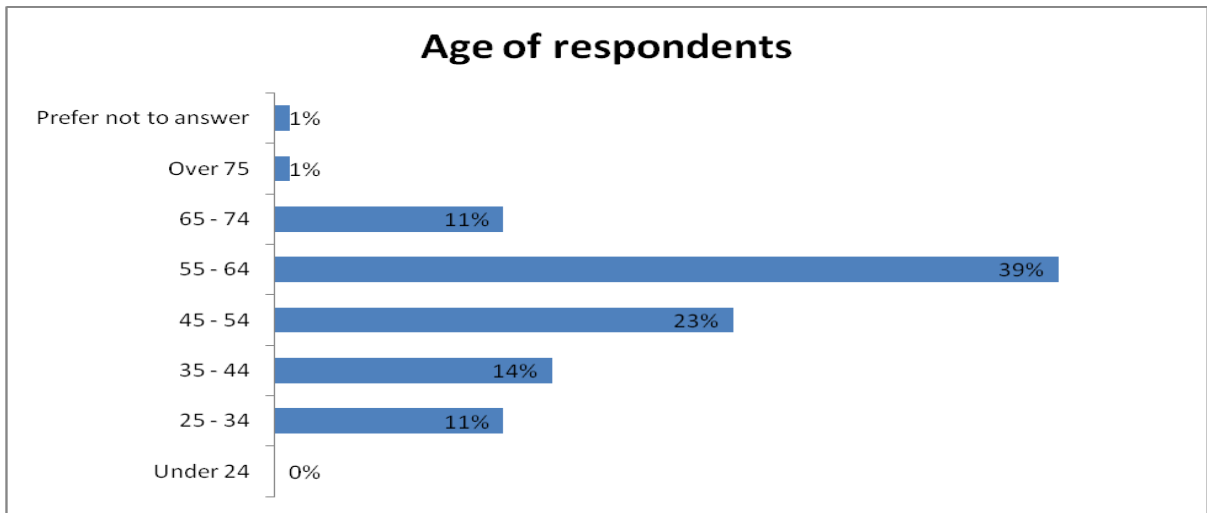


Figure 5.2 Age of visiting anglers

Survey occupational data (Figure 5.3) indicates that 53% of respondents hold what would be expected to be high earning positions, while another 26% are retirees. This information again supports the conjecture that at least half of the salmon anglers have created favourable financial conditions for themselves which can support separate angling holidays. In the case of the retirees, both the disposable income and free time that generally come about upon retirement are likely key elements for this demographic group as well.

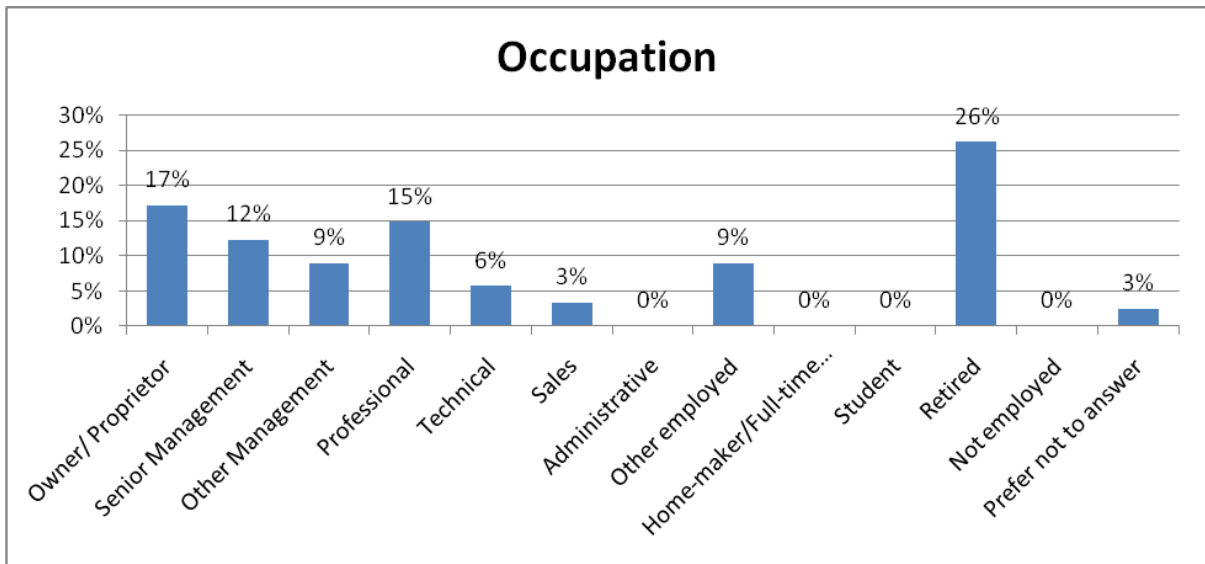


Figure 5.3 Occupation

As the Annual Income chart (Figure 5.4) below shows, 69% of respondents earn more than the 2009 annual UK average of GBP 25,200 (Office for National Statistics: 2009).

This data correlates well with the occupational data shown in the previous chart.

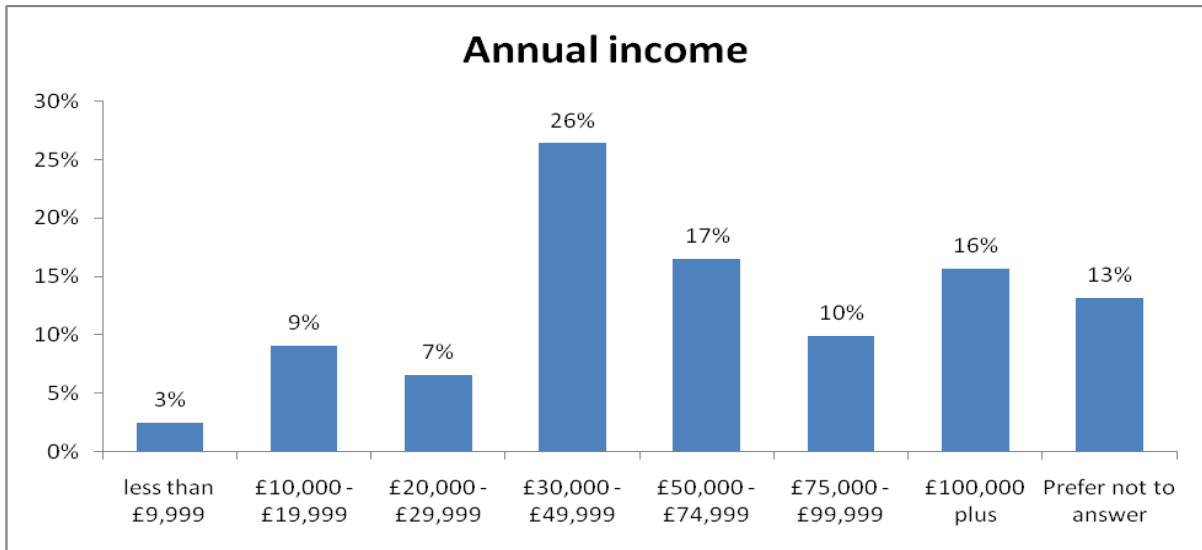


Figure 5.4 Annual income

5.2 PARTICIPATION AND BEHAVIOUR

Of the anglers who responded to the survey, 86% can be considered to be experienced salmon fishermen (over 5 years experience) with 77% of the total being very experienced (greater than 10 years experience). Salmon anglers appear to be quite a dedicated group as almost half of the anglers surveyed (49%) have been pursuing this activity for more than 20 years (Figure 5.5).

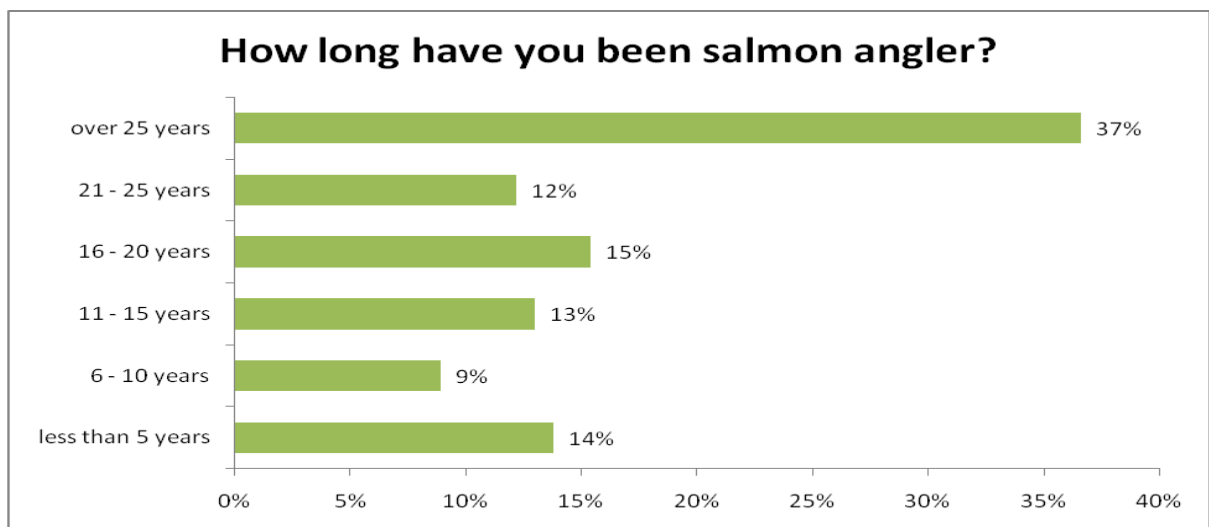


Figure 5.5 Salmon angling experience

As a group, the surveyed salmon anglers also appear to be quite loyal to Scotland as an angling sport destination since 90% of respondents took multiple salmon fishing holidays in Scotland during the five year period (Figure 5.6). It is also significant that well over half the anglers took an average of at least one such holiday per year during the same 5 year period.

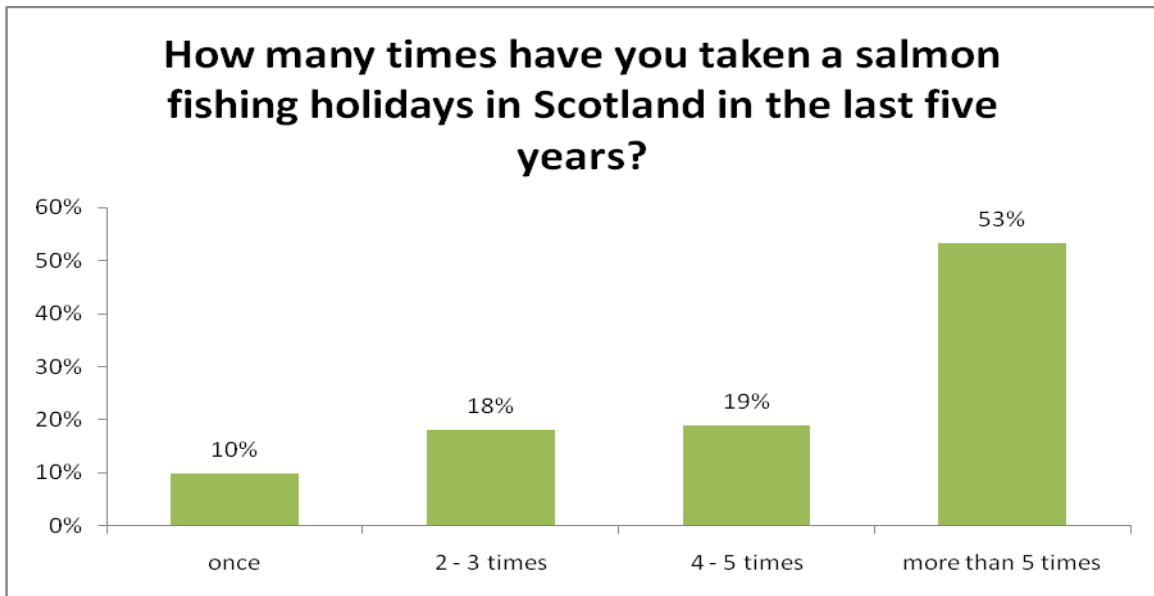


Figure 5.6 Number of salmon holidays taken

Since salmon fishing techniques are similar to those for grayling and trout, it is perhaps not surprising that 54% of the anglers surveyed have fished for all three of the species mentioned. As the chart below indicates, however, 29% of the salmon anglers specialize exclusively on salmon angling and there is in general very little overlap with other types of fishing (i.e. coarse and sea fishing) wherein both habitats and techniques (and therefore equipment requirements) are quite different from those for salmon fishing (Figure 5.7).

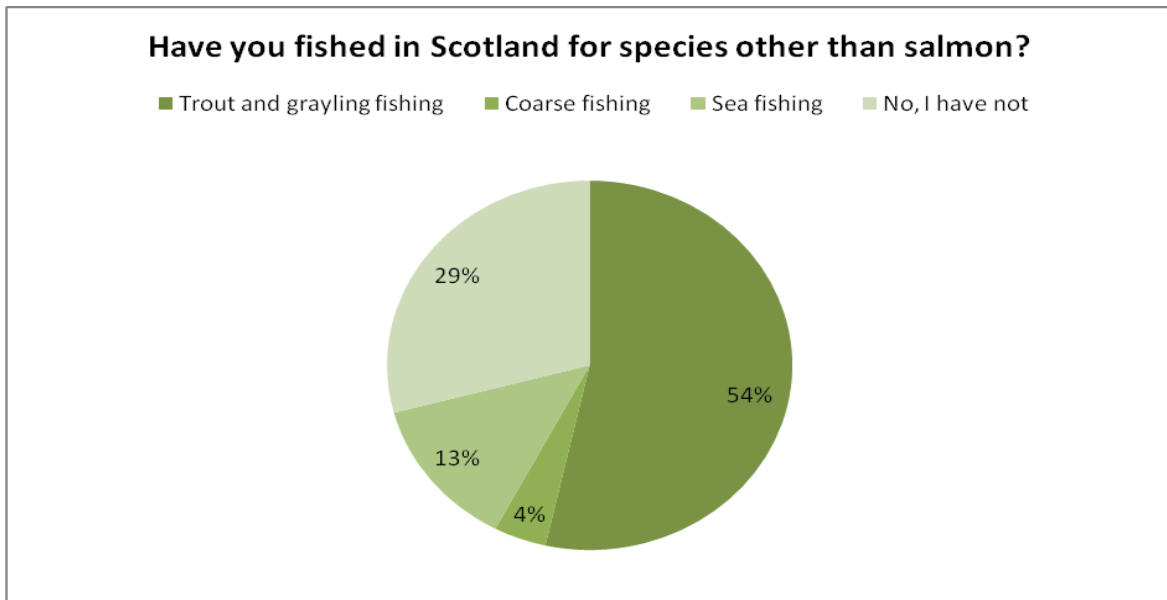


Figure 5.7 Fishing for other species

When asked the length of their salmon angling holidays in Scotland, survey participants responded as per the chart below. While approximately two thirds of the respondents view their angling holidays as week long outings, 17% have also taken short-break angling holidays. A relatively small percentage of anglers (6%) are away to fish for salmon for more than a week and a half at one time (Figure 5.8).

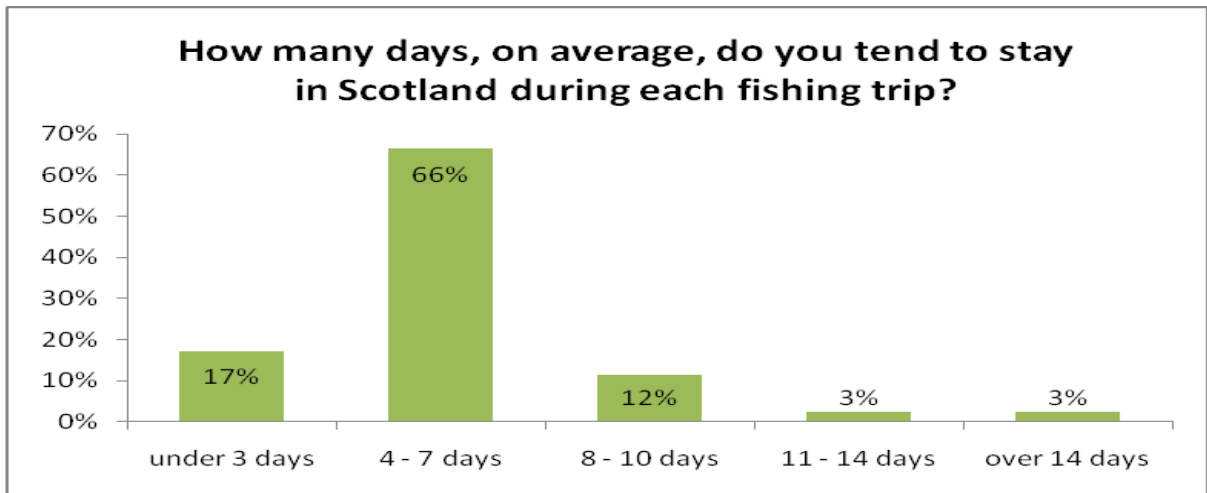


Figure 5.8 Length of angling trip

Scotland benefits from a total of almost 400 salmon rivers (NASCO: 2009). While salmon angling by visiting anglers takes place on virtually all of Scotland’s salmon rivers, the rivers Tweed, Tay, Spey, Dee and, to a lesser degree, Annan appear to be the primary destinations for visiting salmon anglers (Figure 5.9). With the exception of the Annan, these are arguably Scotland’s best known rivers outside the country and are also considered the most prestigious from an angling viewpoint, factors which most assuredly influence their popularity as salmon fishing locations. Their reputations coupled with word-of-mouth angling success stories are also likely to have provided a consistent or growing customer base which in turn has supported holiday destination infrastructure development. A map of Scotland’s major salmon rivers is included in Appendix 1.

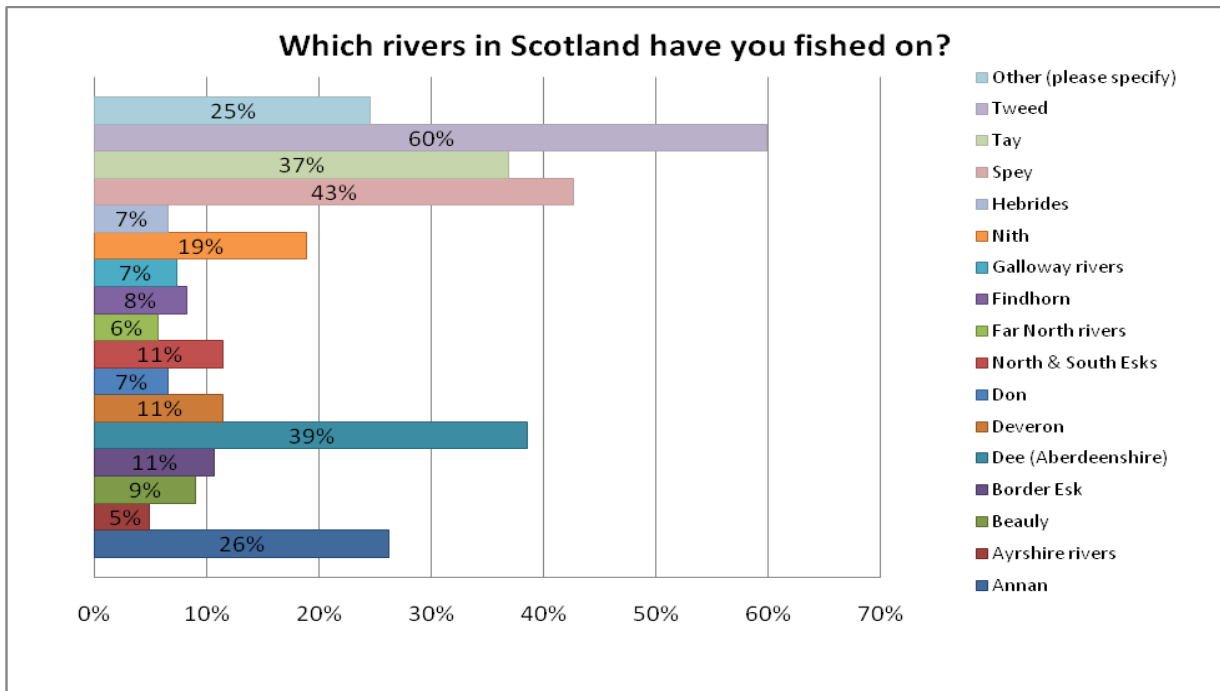


Figure 5.9 Rivers fished

When asked whether they fish for salmon exclusively in Scotland, the responses were split almost 50/50. As indicated in the chart below, 46.7% of the respondents fished for salmon in Scotland only while 53.3% have fished in other countries as well. There are certain to be multiple reasons for these results, the key ones of which are likely to be related to travel budgets, time constraints or foreign language speaking capabilities (Figure 5.10).

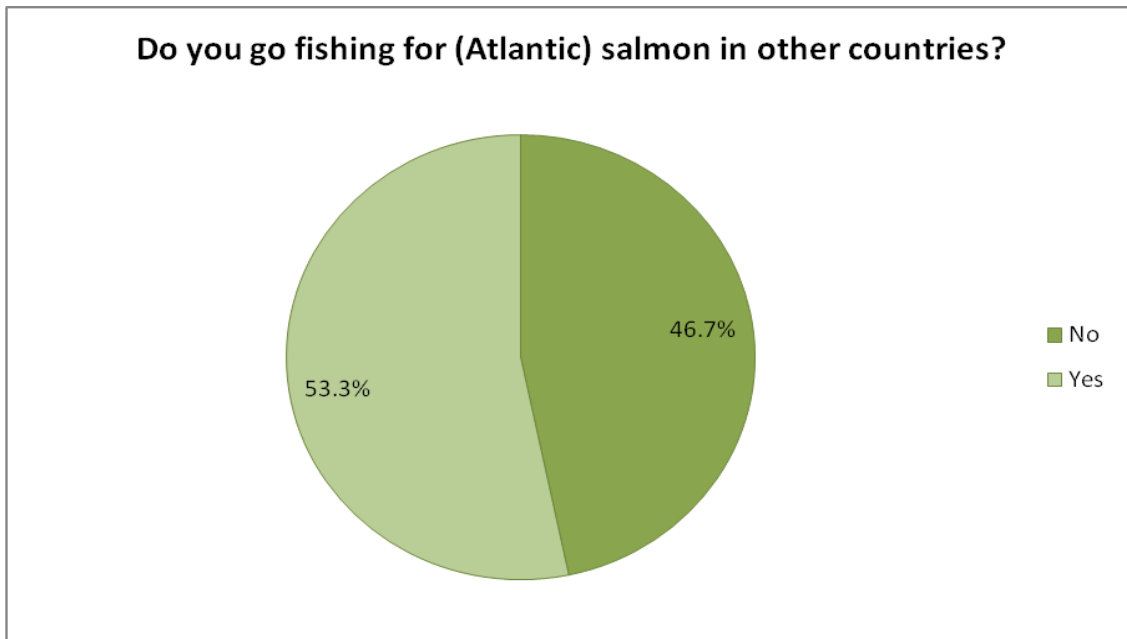


Figure 5.10 Salmon fishing in other countries

For the 53.3% of anglers who did fish in countries other than Scotland, the various other countries where it is possible to fish for Atlantic salmon are shown in figure 5.11. Sixty per cent of visiting anglers have also fished on other British Isles salmon rivers which is likely to relate to close geographical proximity to (English) anglers home or familiarity with the language and environment. Norway is also a relatively popular destination for salmon anglers, be it for its relatively good fishing reputation and organised angling infrastructure, homeland to some of our respondents or relatively easy accessibility due to increases in routes of point to point airlines such as Ryanair.

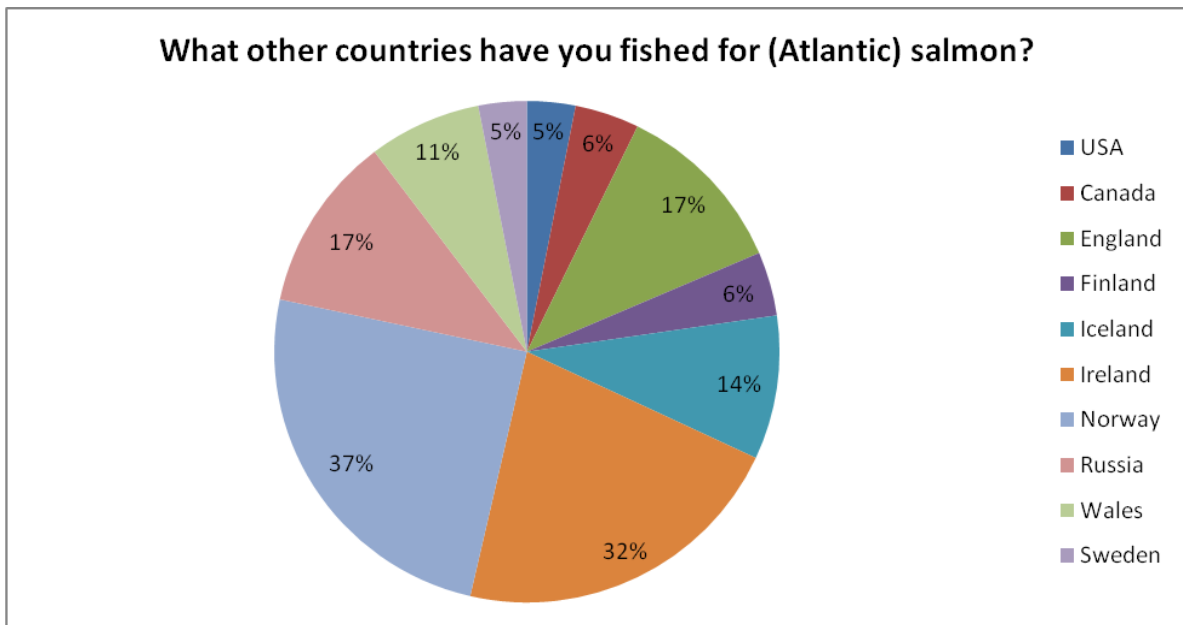


Figure 5.11 Other salmon fishing destinations

With regard to the question concerning the cost of fishing permit, it should be noted that the information was requested in order to better understand/relate to the qualitative research results, not to do an economic impact assessment. Such assessments have been undertaken already by the work of Radford (2004) and others.

Scottish salmon anglers seem to be divided into two camps with respect to daily permit costs as 41.9% spend within the minimum range (< GBP 100) and 42.9% spend within the GBP 100-249 range (Figure 5.12). Since permit costs vary with seasonality, waters fished and fishery, the likelihood is that angler demographics (annual income and occupation in particular) have a major influence on an angler's choice of when and where to fish in Scotland. Renowned angling rivers such as the Tweed, Dee, Spey and Tay for example are thus more likely to be fished at prime time by higher wage earners than those who are lower on the income scale.

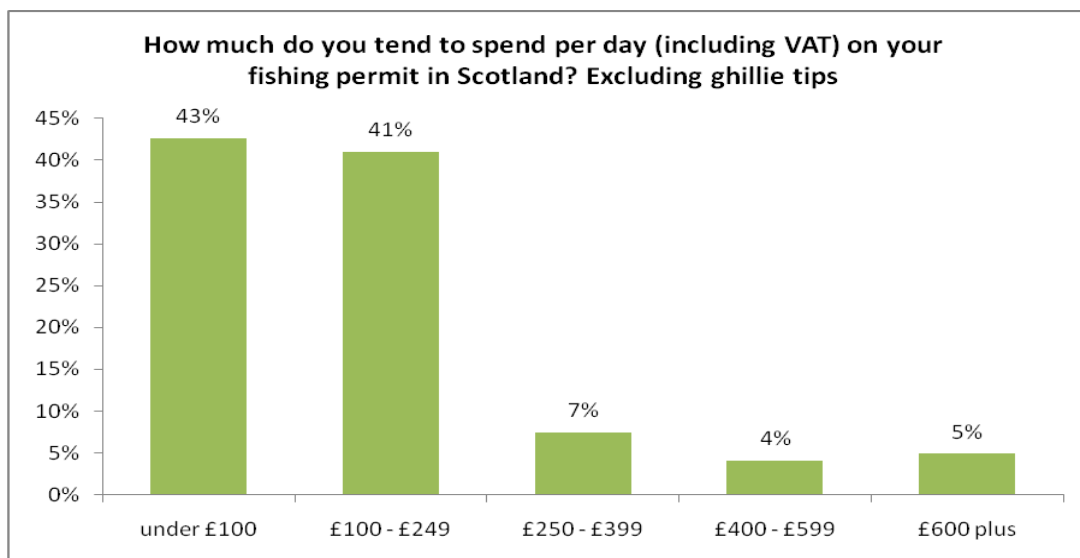


Figure 5.12 Cost of fishing permit

As is apparent in the chart shown below, the majority of salmon angling holidays are taken either alone or in conjunction with an angling friend. An additional large category encompasses anglers taking holiday with a non-angling spouse (Figure 5.13). Once again, this data suggests that a majority of salmon anglers have the financial means to take a non-family vacation and / or have developed a lifestyle that enables them to find time for a specialized 'get-away' type of holiday.

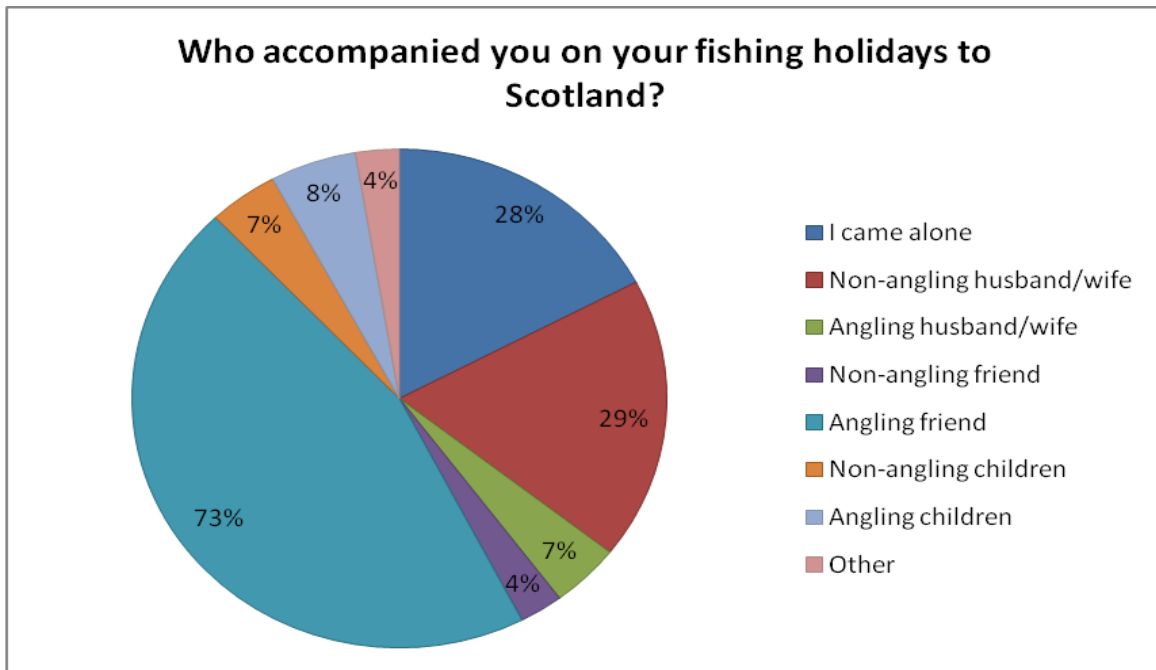


Figure 5.13 Angler's companions

Figure 5.14 correlates well with the information presented in the prior chart. 72.5% of salmon angling holidays were taken with the sole purpose of enjoying all of the elements that a Scottish salmon fishing holiday has to offer including the fishing, comraderie, scenery and opportunity to briefly escape the hustle and bustle of daily life. Another 24.2% of the anglers however participate in additional activities while on holiday, whether it is by themselves, (e.g. visiting a local historical site) or with an accompanying non-angling partner. The data suggests that the anglers who participate in additional activities are primarily those who are on holiday with a non-angling partner.

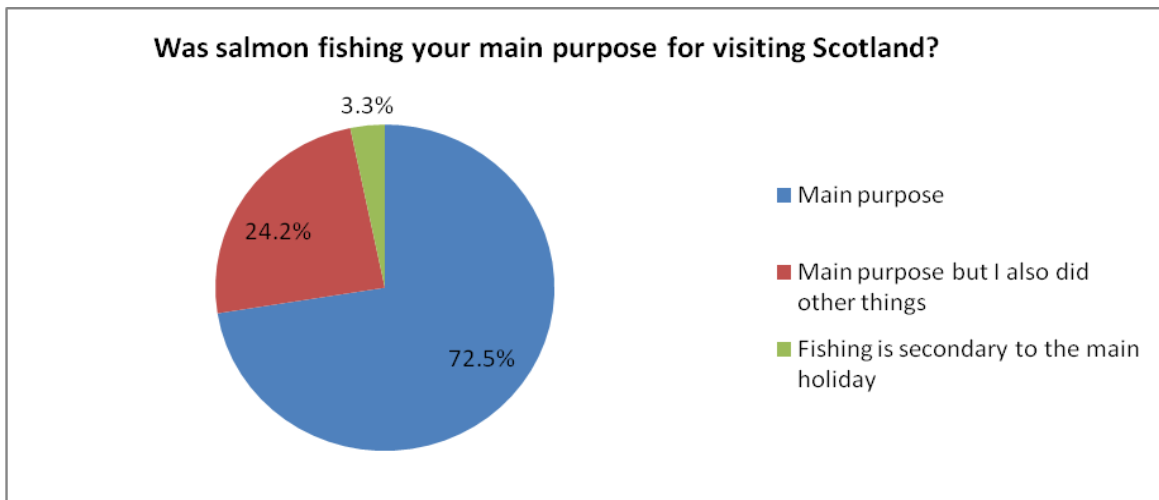


Figure 5.14 Main activities on holiday

Judging from the chart in Figure 5.15, several tourist activities are important to at least a third of visiting salmon anglers. The primary activity and one that is important to 89% of the survey respondents is eating out at restaurants, which suggests that a variety of dining options would be an important consideration when choosing an angling destination. The other important activities are also those that are traditionally desired by tourists visiting Scotland and include sightseeing both by car and on foot, visiting historical sites and shopping for local specialty items and souvenirs.



Figure 5.15 Other activities

As regards expenditures for overnight accommodations, meals and other daily needs and wants while on a salmon angling holiday, 76% of respondents were split evenly between the under £100 and £100-200 per day brackets as shown in Figure 5.16. On a weighted average basis, daily spend for the survey sample was calculated to be £146.

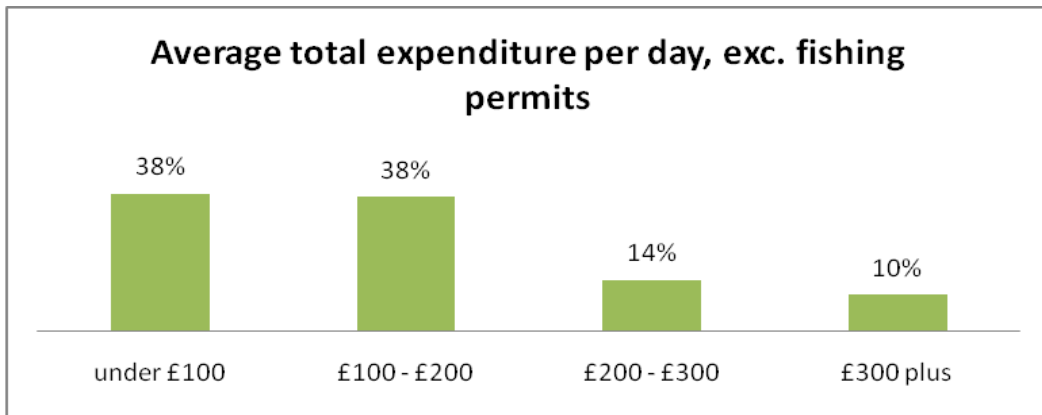


Figure 5.16 Daily expenditure

Figure 5.17 shows that 82% of survey respondents obtained their Scottish salmon angling information from either the Internet or from information provided word-of-mouth by family or friends. Based on recent trends in technology development and usage in general, it is likely that the Internet will continue to grow in importance as a salmon angling holiday information provider. While the Internet was the clear leader as an information source (49%), word-of-mouth information continues to be a vital component for both providing information and acting as an important component in influencing the decision of which fishing destination to choose. The qualitative research also showed that word-of-mouth played an important role in initial inspiration for coming to Scotland. This is because personal recommendations are generally considered to be highly credible and thus carry more weight than information provided in alternative ways. Because of the latter point, angling holiday service providers should constantly be on the lookout for ways to improve customer satisfaction. This also correlates well with the information provided in the qualitative research.

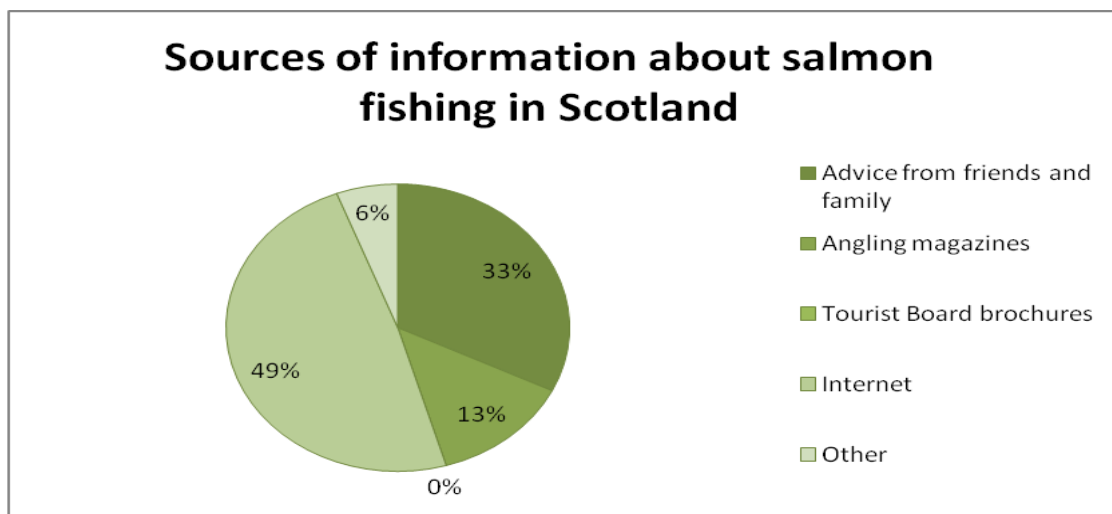


Figure 5.17 Sources of information

As the Figure 5.18 below shows, taken together, booking directly with a fishery or over the Internet dominates the way salmon anglers choose to book their holidays (84% of the total). As was the case with information sources, it is likely that the Internet will grow in importance as a channel for booking holidays, particularly with younger anglers. It is surmised however that the booking of fishing permits directly with fisheries will continue to be the booking channel of choice for many anglers who might prefer to have a personal touch when making their booking rather than dealing solely with a computer. It should also be noted that it is industry practise that even if the intial booking was on the internet if the angler returns the following year then the repeat booking is nearly always done directly with the fishery, thus cutting out the internet link.

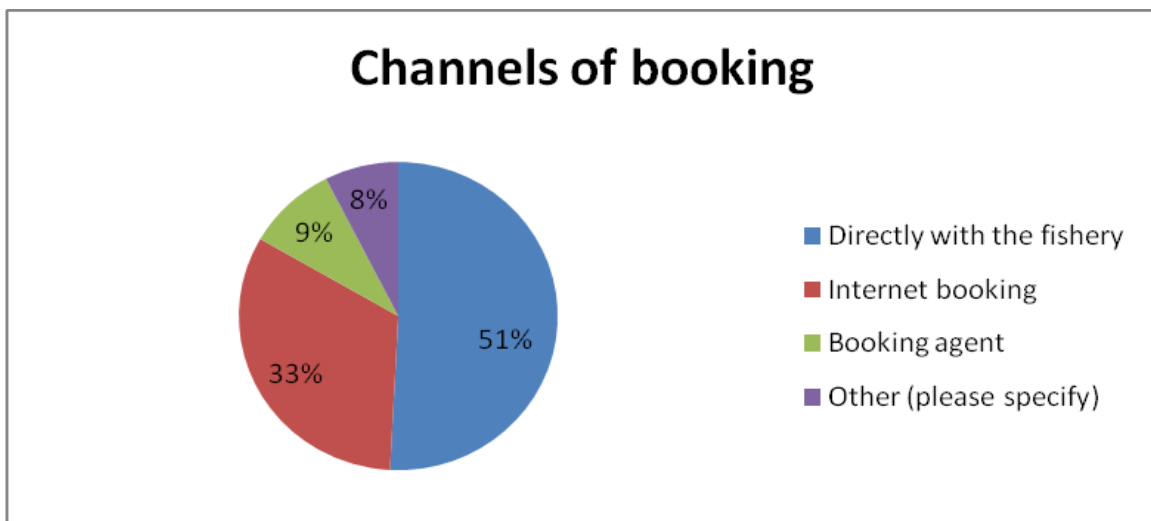


Figure 5.18 Booking channels

88% of survey respondents plan to return to Scotland for another salmon angling holiday in the next 12 months, as shown in Figure 5.19. This implies a high level of satisfaction (which will be examined in more detail in the next section of this study) and bodes well for Scottish salmon fisheries and tourism in general. Of the respondents who are not planning to return within the next 12 months (13% of the total), 73% cited less free time and increased family responsibilities as the reasons for not returning. The other two major reasons cited for the negative responses were cost and the desire to experience salmon fishing in a another country.

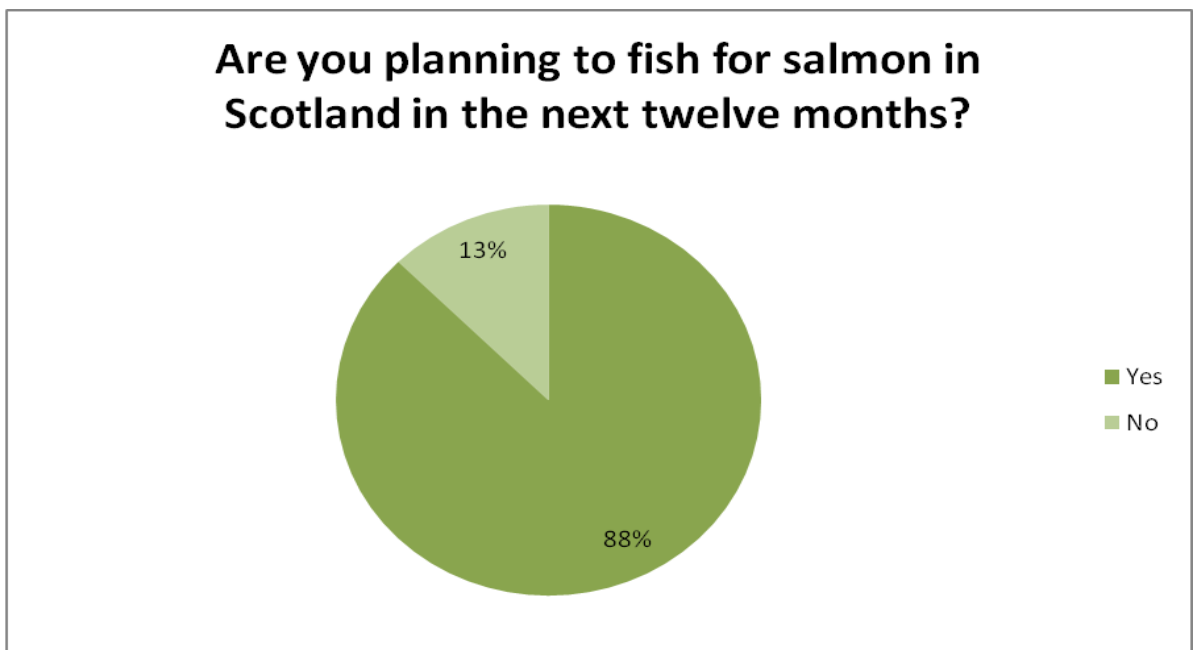


Figure 5.19 Future plans

When asked to cite reasons in general that would limit their ability or desire to fish for salmon in Scotland, respondents identified several factors. However the primary reasons given related to time pressures, either due to family or job obligations, or balancing the desire to fish with other personal interests. Secondary reasons cited related to travel and permit costs (Figure 5.20). Taken together, the likelihood of catching fish and fishing in another country were cited as often as cost factors, which suggests that anglers may feel that trying another country could increase their likelihood of catching more fish.

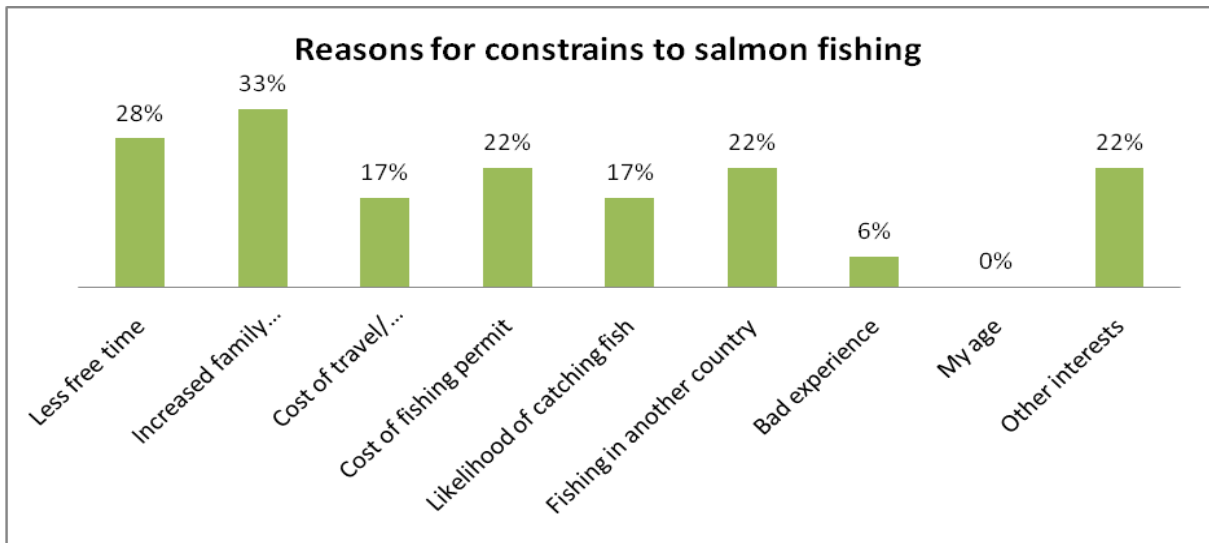


Figure 5.20 Constraints to fishing

5.3 MOTIVATION AND SATISFACTION

Visiting salmon anglers agree that there are multiple factors that motivated them to choose Scotland as their fishing holiday destination (Figure 5.21). As one would perhaps expect, there is fairly strong agreement that the primary factor was to catch fish, which suggests that anglers generally feel the likelihood is high that they will indeed do so in Scotland. This further suggests that anglers anticipate that fish populations are adequate and adequately managed to the degree that this is possible. There is an equally strong level of agreement that the prospect of experiencing the beautiful, untamed and pristine natural surroundings Scotland has on offer was a key motivating factor, which sends a valuable message about the importance of environmentally sustainable tourism. There is also a strong level of agreement that the desire to be with family and friends and to 'get away from the daily grind' were strong motivating factors as was the desire for excitement.

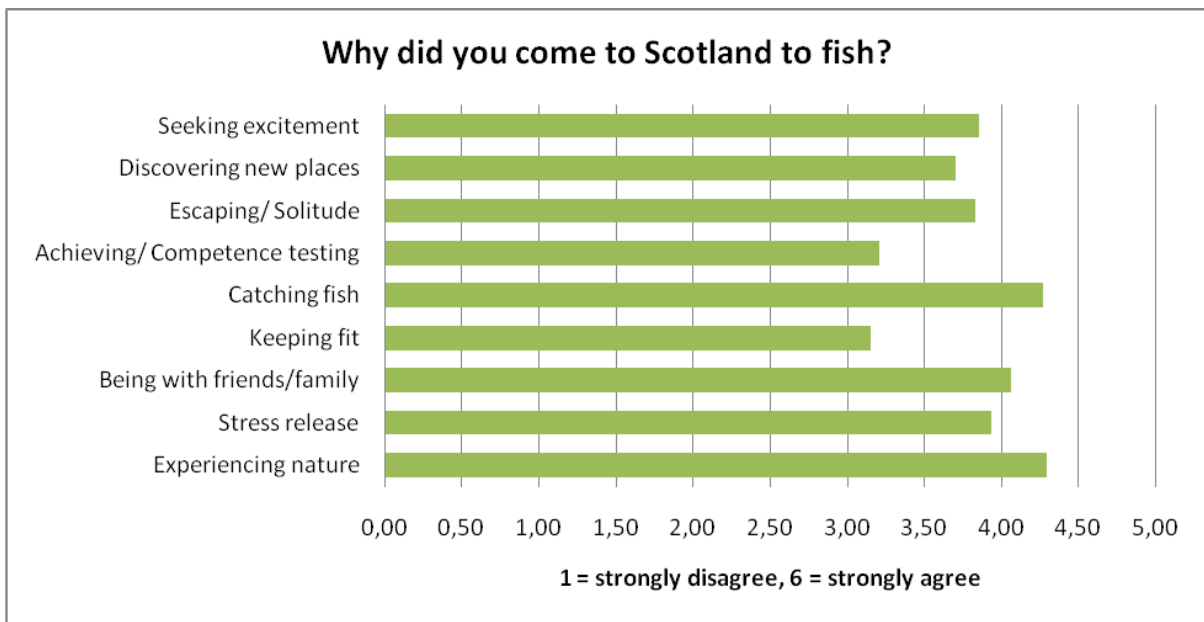


Figure 5.21 Reasons for coming to Scotland

Survey respondents were also asked to rate their level of satisfaction with their Scottish salmon angling holidays according to several parameters as listed in Figure 5.22. On balance, anglers were satisfied to very satisfied with the friendliness of the people they met and the beauty and solitude of their natural surroundings. As regards scenery and wildlife, 56% were very satisfied with an additional 42% satisfied. In addition, they were satisfied with their food and accommodation quality as well as the ease with which they were able to book their holidays. To a somewhat lesser degree they were also satisfied with the quality of service, fishing quality, travel logistics and opportunities for eating out. 18 % of the responses for this last point received dissatisfied or very dissatisfied ratings.

Two primary sources of dissatisfaction were identified and are related to prices for angling permits – which for 38% of respondents were felt to be too high (8% of the responses regarding permit prices and value for money were in the category of very dissatisfied) and thus negatively affected their value for money ratings, and number of fish caught – which for 38% of respondents did not fulfill expectations. While anglers were somewhat dissatisfied with the number of fish caught, this was not the case regarding fish size for which 80% of respondents were satisfied with another 10% very satisfied. Another area of dissatisfaction was related to catch-and-release regulations, wherein 31% of the respondents were either dissatisfied (24%) or very dissatisfied (7%).

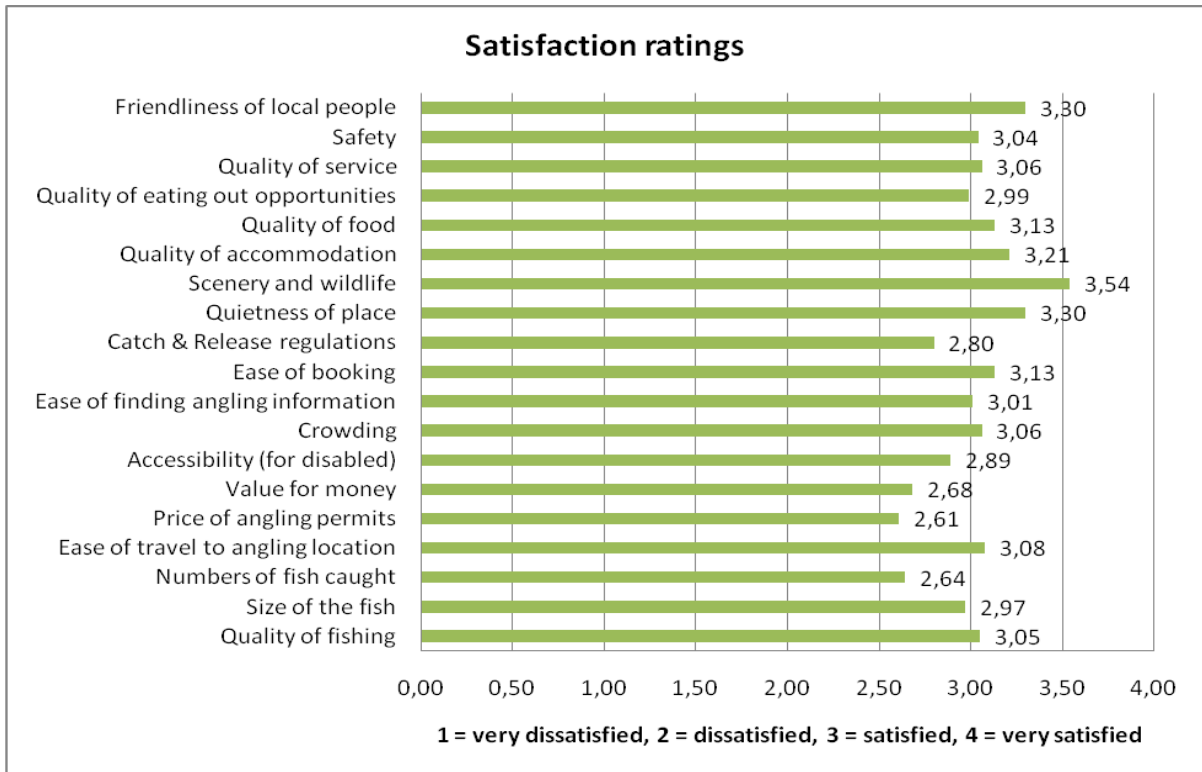


Figure 5.22 Satisfaction ratings

As indicated in Figure 5.23, which shows the results of measuring satisfaction regarding the catch aspects of fishing, survey respondents generally agreed that they can enjoy a fishing trip even if they do not catch any fish, as long as they have a realistic opportunity to catch something. 84% and 93% respectively agree or strongly agree with the two points made in the prior statement. While this may be true, 69% of respondents also agree or strongly agree that their satisfaction level increases with the amount of fish caught. There is also general agreement that catching many small fish is preferable to catching one or two large fish, suggesting that a more constant level of action with a bit of ongoing excitement is preferable to one or two very exciting moments with little to no action or excitement in between.

89% of the anglers fully support the idea that they do not feel the need to keep the fish they catch in order for a fishing trip to be deemed successful. Having said that, however, 39% are not happy with the idea of having to return all fish caught. This concides with the qualitative research where anglers pointed out that they understand the need for catch and release regulations, however they also need to bring a fish or two home to feel satisfied with their overall trip.

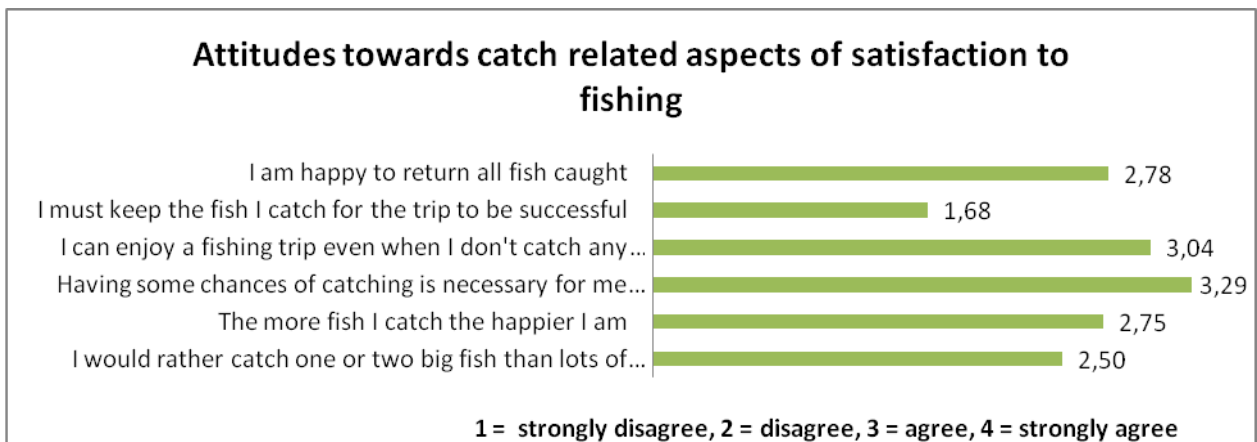


Figure 5.23 Catch related satisfaction

Several questions were also posed in the survey to gauge visiting angler attitudes towards fishery management issues and possible actions (Figure 5.24). Two questions asking whether better service and facilities were needed received much the same response: anglers were split down the middle as to whether they agreed that improvements in these areas were needed or not. This certainly indicates that facilities and service are adequate however it also suggests that improvements would likely improve the holiday experience and could thus contribute to increased angler satisfaction. It is also interesting to note that anglers in the two highest age brackets were the ones interested in having better facilities. The majority of anglers (83% and 81% respectively) agreed with the idea that fishery management needs to work on pollution reduction and increase expenditure on habitat improvements. The responses to these two possible actions correlate well as both actions are aimed at addressing environmentally sustainable tourism. At the same time, 82% of the anglers were in disagreement (24% in strong disagreement) with the idea of reducing the number of fishing permits, which is one of the possible avenues that could be employed to help reduce pollution.

Two questions were put forward with regard to catch and release regulations and it is readily apparent that this is a topic that is of great interest to anglers as also qualitative research showed. 79% disagree (half of which strongly disagree) with the idea of cancelling catch and release. At the same time however 70% disagree or strongly disagree with the idea of imposing a 100% catch and release regulation. These responses suggest that anglers understand the need for catch and release but are

looking to fishery management to find a middle ground between the wants of anglers and the needs of the fisheries. Here again it is important to note that the anglers in the lower age brackets were more open to the idea of 100% catch and release than were the anglers in the higher age brackets.

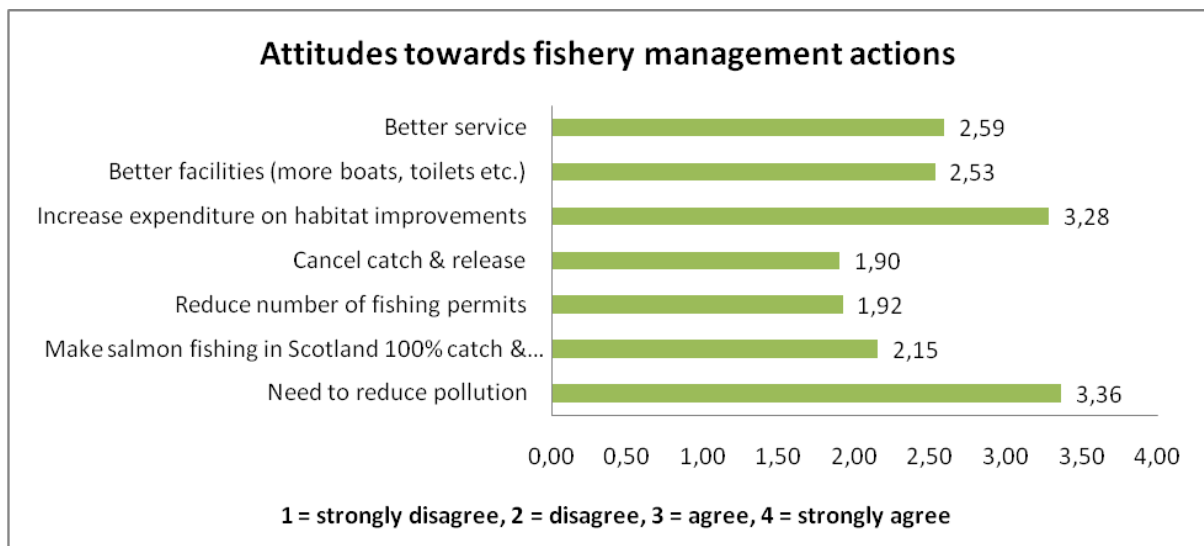


Figure 5.24 Attitudes towards fishery management actions

5.4 QUALITATIVE DATA

A review of the survey qualitative information illuminated a number of themes that stood out and were generally agreed upon by a large number of survey participants. This information proved to be an important addition to the quantitative data as it helped to develop a more in-depth understanding of various factors driving the inspiration, satisfaction and dissatisfaction of this important segment of salmon anglers.

5.4.1 Initial inspiration

Scotland's brand as the home of salmon fishing is very strong, and promoted well within various angling books, magazines, on the Internet. Word of mouth information played an extremely important role in the initial inspiration for some of the survey anglers to come to Scotland, as in many cases they acknowledged that Scotland had been highly recommended by their angling friends. Some of the anglers visited Scotland because they had a spur of the moment opportunity they were able to exploit – be it an invitation from friends or a good sales pitch they could not ignore or refuse.

Around a quarter of the anglers stated that salmon fishing is a family tradition or part of their heritage – they were introduced to fishing in a specific area of Scotland by (usually) their father and developed a loyalty to the area that has remained ever since (some of them visit the same area because family members they came to visit live there as well). Salmon fishing appears to also come about as a natural progression from trout fishing (which generally tends to be cheaper and more easily accessible). As both the

quantitative and qualitative responses indicated, the vast majority of anglers have been engaging in salmon fishing for very long period of time. As one of the respondents nicely summarized:

“I started trout fishing 30 years ago and a few years later I had the chance to go salmon fishing for two days on the South Esk, caught one small salmon on a fly and boy was I hooked!”

5.4.2 Scotland as a salmon angling destination – Strengths

When asked to describe what anglers love about Scotland both as a tourist and salmon angling destination, nearly 100% of the answers cited environmental factors (such as stunning scenery and wildlife, pure fresh air, cleanliness, tranquillity, solitude). As one of the visiting English salmon anglers summarized:

“The whole experience from the surroundings to the tranquillity of the break... Travelling from the Manchester area as soon as you get above Lancaster on the M6 knowing where you are going and what to expect, the stress levels decrease and a whole feeling of wellbeing comes about”.

This comment indicates that Scotland is viewed as an escape destination that helps anglers to get away from the daily grind, and the combination of tranquillity and natural

beauty is what anglers are seeking in their angling experience to help decrease their stress levels.

Several other elements generally perceived as Scotland's strengths were commonly cited in the qualitative responses. These elements relate to the normally accepted unique attractions that Scotland as a tourist destination and brand has traditionally offered and which have in the past been well promoted by VisitScotland. These include the friendliness and hospitality of Scottish people, the great quality and unique tastes of Scotch whisky, Scotland's proud culture and history and the relaxed Scottish way of life. The non-angling aspects of salmon fishing in Scotland are viewed as being equally as important to satisfaction as fishing itself:

“The whole of fly fishing in Scotland is a mystique. It is as much about the hills and the rushing rivers as it is about the fish. The whisky doesn't hurt either!”

With regard to tourist infrastructure, the overall perception was that there is a well-developed connectivity amongst various means of transport. Anglers mentioned for example that they found it convenient to fly to a local airport and then hire a car to drive to rivers that were also viewed as easily accessible.

Several other positive points were cited in the qualitative research, specifically as they relate to Scotland as a salmon angling destination. In addition to Scotland's great outdoors (held in extremely high regard by anglers), ghillies were cited as being generally quite competent and keen to help anglers to catch fish. The availability of a

longer salmon angling season is perhaps Scotland's greatest advantage in comparison with other salmon angling destinations where the seasons tend to be of much shorter duration. The quality and availability of spring fishing in particular was mentioned quite often. The Scottish salmon season starts 11 January and finishes 30 November, but the actual dates may vary from one fishery to another. Also salmon fishing is not allowed, by law, on a Sunday. This almost 11 month season compares dramatically with the salmon fishing seasons in Norway and Iceland which last for only 10 to 12 weeks or so during the summer months. From an overall tourism viewpoint this long season is extremely beneficial as the additional tourist traffic helps to sustain local businesses outside of the main holiday season.

As regards rivers fished, popularity varied according to the month of the year. The River Dee in Aberdeenshire, for example, is accepted as the best river in the world for spring salmon. The Tweed produces more rod caught salmon than any other river in Europe and is almost always fully booked over the prime autumn season. This is despite the fact that the price of a permit can climb to over £1,000 for a day of fishing on certain sections (beats). Despite the high prices for permits on some of the rivers, many anglers (both English and other Europeans) mentioned that they perceive salmon fishing in Scotland as inexpensive in comparison with other destinations and thus great value for the money.

There are rivers available to suit virtually any salmon angling style or preference and many rivers are large enough to provide different sets of conditions thus providing plenty of challenge for anglers. As one respondent explained:

“One of the advantages of Scotland is that there is a choice. You can pay virtually what you want. You can find total isolation or be closer to an urban environment. There are fast and slow beats often close to each other and the fishing can have various degrees of challenge all on the same beat.”

An additional advantage cited was that management restricts the number of anglers on each beat thus minimizes overcrowding and therefore provides more of the solitude and peace valued by salmon anglers.

“In general if you fish the rivers of England and Wales you will always have to share the water with other anglers. Although this sounds selfish, when in Scotland and you have hired a beat in general there is more structure to allow you to fish said beat without feeling rushed.”

Owing to Scotland’s long tradition in fly fishing, stretching back to the Victorian era, the salmon fishing industry is viewed as being well established and organised. This view was apparent in the quantitative research responses where satisfaction with the ease of booking, finding information and ghillie professionalism was very rated highly.

As one angler indicated, sometimes overall satisfaction with a fishing trip depends on a bit of luck with regard to both nature and man:

“When the weather, the scenery, the hospitality, and the fishing come together, nothing beats Scotland for me.”

Brand chart (Figure 5.25) summarises various unique points that respondents mentioned in the qualitative research.

5.4.3 Scotland as a salmon angling destination – Weaknesses

Viewed in total, approximately two thirds of visiting anglers responded that they felt completely happy with their angling experience in Scotland and would not change anything about it. One third of the anglers nevertheless expressed concerns that related to either one off negative experiences or perceived drawbacks for Scotland as an angling destination.

Sources of dissatisfaction were split fairly evenly between natural and man made factors. The presence of midges and bad or unpredictable weather that affected the quality of fishing were first and foremost among the natural factors. Shortcomings in the services provided by both fishing and general tourism related businesses represented the primary man made factor.

Some anglers had issues related to transport – fuel prices were cited as inordinately high, especially outside of major cities and some roads appeared to be in bad condition

or were congested. Other anglers expressed concern with the hospitality industry. As the quantitative research showed, eating out is the most prevalent activity on an angling holiday besides fishing, however anglers were concerned about the quality of the food and the limited number of eating opportunities and gourmet restaurants available. In addition, outside of the holiday season in some locations restaurants tend to close earlier than some anglers would prefer. With regard to accommodation, anglers felt that they tended to be overpriced or that poor value is provided for the money. Some commented that they would prefer to see more self-catering accommodation opportunities on offer. Both restaurants and hotels received poor marks for standards of service by some of the survey participants.

Concerns about service attitude were also expressed with regard to ghillies. It should be noted that in general respondents were satisfied with ghillies and the service they provided, however a few anglers noted that they felt that the service did not reflect the price and that some ghillies may require training. Some respondents stated the need for ghillies to develop an understanding and sensitivity for the fact that some visiting anglers are non-native English speakers. Other respondents noted that some anglers show a disregard for others and seem to flaunt some of the rules and etiquette of river craft (such as rotation on water or spinning). However this was normally on beats where ghillies were not present throughout the day.

Canoeing in some locations appeared to create a clash between anglers and canoeists, both of whom were pursuing their recreational sport on the same stretch of water.

Perhaps the biggest surprise that came to light in the qualitative research was how many anglers actually mentioned their concerns about sport fishing sustainability and the effects fish farms and netting have on salmon populations. One respondent summed up the situation as:

“...Poorly controlled salmon farming is causing untold harm particularly through sea louse infestation which is proving fatal to migrating wild smolts.”

Fish farms only affect fishing on the west coast of Scotland but there is significant scientific research to show that the farms, and specifically the sea lice emanating from them, are causing major damage to the local wild salmon populations (Atlantic Salmon Trust: 2011). Netting of salmon takes place predominately on the east coast of Scotland and is now greatly reduced. (Atlantic Salmon Trust: 2011).

Anglers also commented on the availability of information on the Internet. Although there is a comprehensive website (owned by a private company – FishPal) with information about many rivers and their catches, anglers noted that not all rivers had this information. However, this is probably because many anglers do not realise that for rivers to be included in detail involves a commercial cost and the decision to be included lies solely with the fishery managers. VisitScotland’s angling website was viewed as ‘useless’ because it was deemed virtually impossible to find it in the first place and the

information provided is no more than on FishPal. However it should be noted that the site is actually a branded version of the FishPal site and that is why it is identical.

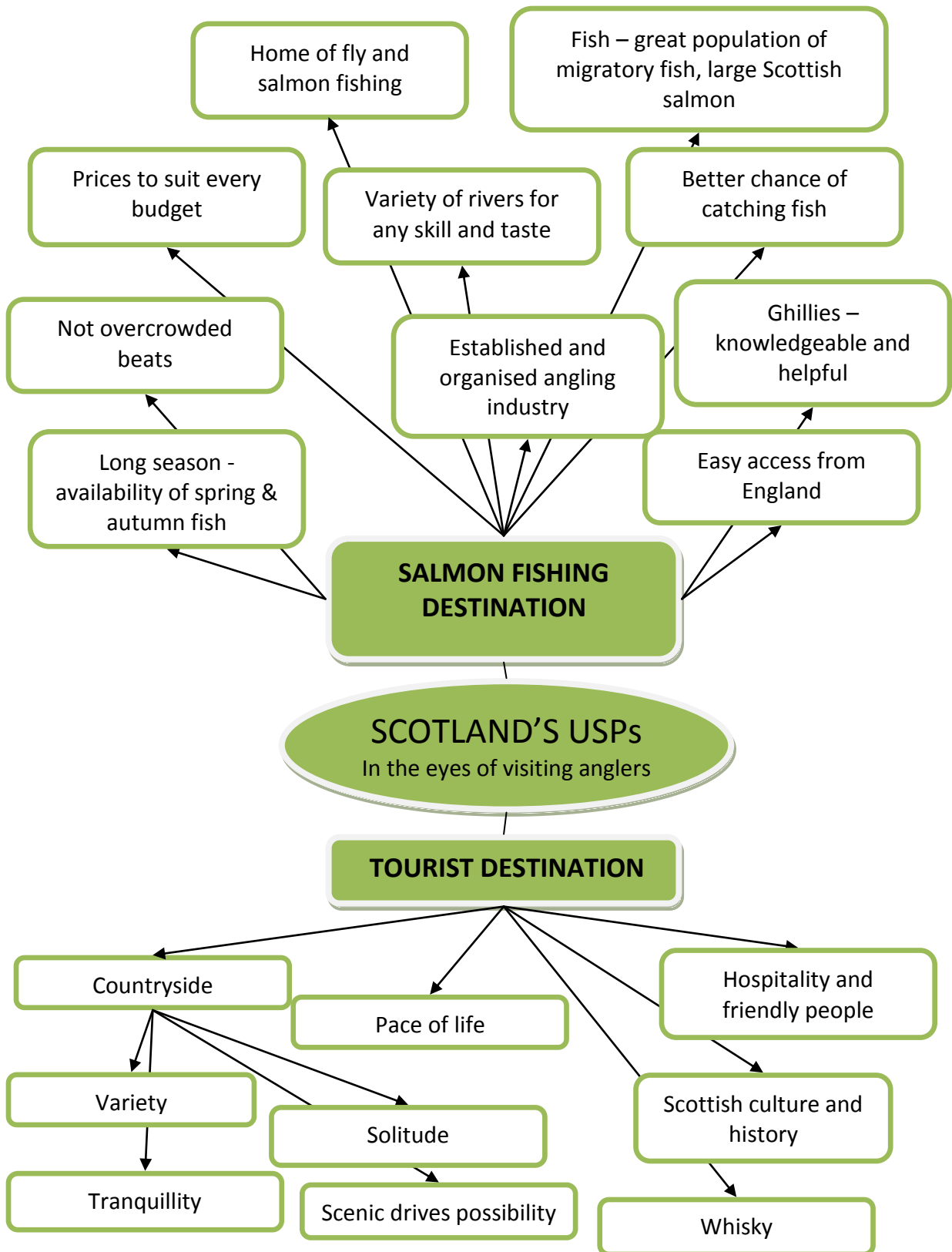


Figure 5.25 Brand chart

CHAPTER SIX

CONCLUSIONS AND

RECOMMENDATIONS

CONCLUSIONS AND RECOMMENDATIONS

The aim of this study was to critically evaluate the existing literature addressing the social aspects of angling tourism in Scotland and to contribute to the existing body of knowledge by developing a better understanding of the demographics, motivations and participation of a specific segment of angling tourism: that of visiting anglers who choose Scotland as a salmon angling holiday destination. Based on the information gathered from the literature and data developed via the survey that formed the foundation for this research study, the intent was to provide summaries in the form of 4 profiles addressing non-resident salmon anglers 1) demographics, 2) participation, 3) motivation and satisfaction and 4) Scotland's perceived USPs (unique selling points). It was furthermore planned that these profiles would serve as the basis for suggestions regarding further research and outlines for marketing strategies and national resource plans that could assist VisitScotland, tourism service providers and fishery managers as they develop future initiatives in support of Scottish salmon angling tourism development.

6.1 NON RESIDENT SALMON ANGLER DEMOGRAPHIC PROFILE

As is the case for angling in general, the visiting salmon angler is overwhelmingly male. These anglers make their home primarily in the British Isles or in European countries where English is commonly spoken as a second language. Although these anglers are represented in all age groups from young adults to retirement age individuals, the majority is represented by middle-aged men. According to their career profiles, these anglers tend to be well educated and are engaged in endeavours that provide them with annual incomes significantly above the UK national average.

6.2 NON RESIDENT SALMON ANGLER PARTICIPATION PROFILE

Salmon anglers visiting Scotland are typically dedicated salmon fishermen who have been engaging and specializing in this activity for over 10 years. Loyalty to Scotland as their preferred destination is quite high as the majority of these anglers have taken multiple Scottish angling holidays in the past 5 year period. Having said that, close to half the anglers have tried salmon fishing in other countries as well, driven primarily by what they perceive as a possible opportunity to find even better fishing waters than in Scotland. Overall satisfaction with salmon angling in Scotland is so high however, that the overwhelming majority of visiting salmon anglers plan to return to Scotland in the next 12 months. For those who do not plan to return, it is almost entirely due to time constraints. If they can find the time, they plan to return to Scotland. For the most part, salmon angling holidays last for a week at a time with the rivers Tweed, Tay, Spey and

Dee being the primary waters fished. These are clearly the best-known and most prestigious Scottish salmon fishing rivers and both the available information on the Internet and word of mouth recommendations from fellow fishermen drive anglers to the beats on these waters. While there is a rapidly growing trend to book holidays over the Internet, most non-resident salmon angling holidays are currently booked directly with the fisheries. The typical visiting salmon angler takes his holiday either alone or with an angling friend and the most important activity besides fishing while on holiday is eating out. In addition to the possibility of catching fish, other key drivers for their angling holidays include the desire for being with other like-minded people, the enjoyment of Scotland's great outdoors and the idea of temporarily escaping the pressures of everyday life.

6.3 NON RESIDENT SALMON ANGLER MOTIVATION AND SATISFACTION PROFILE

Several factors motivate anglers to visit Scotland to fish for salmon. The primary factor is that they feel the likelihood is high that they will indeed catch salmon in Scotland. Almost as important is the desire to immerse oneself in Scotland's unspoiled natural environment coupled with the opportunity to see some of the country's wildlife. Additionally, visitors have a strong desire to break free from their normal environment for a few days and enjoy some solitude or find some excitement to help restore their psychological energy levels. For those visitors who have family or friends near their angling destination, the prospect of spending quality time with these individuals is also a strong motivator. To summarize, the key motivators for non-resident salmon anglers to

make them choose Scotland for their holiday destination are: a high likelihood of catching fish, desire to experience Scotland's unspoiled nature, the need to get away to 'recharge one's batteries' and the desire to spend time with family and friends. Visiting salmon angler satisfaction levels are generally quite high, indicating their motivational expectations are met for the most part. Satisfaction is very high regarding Scotland's natural surroundings and the friendliness of local people and service providers. It is also generally high regarding food, accommodations and ease of holiday booking. Still satisfactory but slightly lower on the rating scale are fishing quality, travel logistics, service quality and opportunities for eating out. With regard to fishing quality, anglers are more satisfied when they catch many small fish than when they catch fewer but larger ones. They do not feel a need to keep all the fish they catch but do have a desire to keep one or two and some are therefore not satisfied with some catch and release regulations in their current form.

6.4 SCOTLAND'S USPs AS PERCEIVED BY NON RESIDENT SALMON ANGLERS

Taken together, existing literature addressing angler tourism in Scotland and the quantitative and qualitative results of this research study's survey illuminated several unique selling points for Scotland as an attractive destination for visiting salmon anglers.

These are summarized as follows:

- Scotland's brand as the home of salmon fishing, encompassing many factors such as heritage, word of mouth reputation, documentation in special interest magazines and angling books.

- Stunning pristine natural scenery and wildlife.
- Clean unspoiled surroundings and fresh clean air.
- Tranquillity and solitude.
- Distinctive cultural and historical sites.
- Very long salmon angling season compared with alternative country destinations.
- Scottish single-malt whisky culture and heritage.
- Salmon angling choice with regard to angling styles and conditions.
- Beat restrictions/management which minimizes overcrowding and maximises its prestige.
- Warmth and hospitality of the Scottish people.

All of these points combined together contribute to a feeling of well-being for visiting salmon anglers thus making Scotland both an ideal angling and escape destination.

6.5 SWOT ANALYSIS

Strengths

- Scotland's reputation as the home of salmon angling.
- Established angling and tourism industry.
- Scottish salmon seen as large on size, good availability.

- Beautiful and tranquil environment.
- Fishing opportunities to suit every diverse budget and skill.
- Long fishing season.
- Reputation of Scotland's welcoming people.
- Angling seen as a healthy activity, promoted well to recruit young anglers.
- Significant economic contribution to local communities, prolongs tourist holiday season.
- Restricted number of angling spaces that decreases overcrowding.

Weaknesses

- Scotland's perceived reputation as a country with lower interest in fish sustainability.
- Perception of declining fish numbers.
- Restricted number of angling spaces.
- Perceived as expensive, both in angling and hospitality, by UK anglers.
- Unpredictable weather, problems with midges in certain areas.
- Not as well promoted as angling holidays outside of Scotland.
- A perception that it is difficult to find out information on salmon angling.
- Poor quality fishing on west coast due to fish farms and sea lice.

Opportunities

- More investment into marketing could develop a bigger and potentially loyal customer base from overseas and the UK.
- Increasing number of international direct flight air connections with various European destinations makes it easier to attract anglers.
- Active, science based, fisheries management organisations continue to carry out extensive fisheries improvements to sustain and ultimately increase salmon numbers.
- Ageing population with more available free time increases the potential base of anglers.
- Organisations such as 'Get hooked on fishing' increases number of new UK anglers which may turn to salmon fishing.
- Improvements in environment could help to promote Scotland as a sustainable tourism destination and therefore increase green tourism opportunities.
- The potential for an increase in the number of higher spending anglers could encourage beats/rivers to provide a more professional and commercial service, which is more customer orientated.

Threats

- Continued environmentally unsustainable issues relating to fish farms.
- Increase in 100% catch and release regulations on more rivers could potentially decrease the number of interested anglers.

- Increase in marketing and promotion of other 'more exotic' angling destinations with a more customer orientated angling industry.
- Not marketing salmon fishing sufficiently and therefore ultimately losing the customer base.
- Not changing the perception that salmon fishing is getting poorer or is very difficult to obtain.
- The Scottish Government not fully realising the importance of the industry and not supporting it in an effective way.

6.6 GUIDANCE FOR ANGLING DESTINATION MARKETING STRATEGIES

As this study shows, Scotland is a world class destination for salmon anglers and does a very good job of fulfilling expectations on many levels. The study also shows, however, that the current clientele is for the most part, limited to UK citizens. Because of the huge potential economic value that visiting non UK salmon anglers offer the country in terms of foreign exchange earnings, the challenge for Scottish salmon angling tourism marketing is to develop strategies to expand the clientele base. At present the vast majority of VisitScotland angling marketing is directed at the UK market. (Holdsworth: 2011).

However, the major potential (and relatively untapped) source of expansion would appear to be the mainland Europe market, especially Scandinavian countries.

The researcher would suggest it would be particularly advantageous to specifically target countries such as Norway, Sweden and Finland where there is a high population

of anglers – 32%, 23% and 27% respectively (EAA: 2007). Those countries benefit from direct and convenient flights to Scotland with various point to point airlines, have one of the highest GDP per capita in the Europe and Norway, which is the main market for Scandinavian salmon anglers, only has a short (around 10 – 12 weeks) season for salmon angling. In addition, according to the research, they view Scotland as good value for money (or inexpensive) and have generally a good knowledge of English.

It would therefore seem logical to target marketing for fishing holidays over the shoulder season (September, October, November) when the Scandinavians have no local salmon fishing available but, according to published figures (FishPal: 2011), this is the prime time for Scottish salmon fishing.

However, we have to remember that the number of spaces for salmon anglers is restricted by management and some of the top beats are often fully booked at prime fishing time. However, as can be seen from the FishPal web site, there is often more availability on prime beats than is generally perceived. The advice, therefore, is not to forget about or alienate current anglers that have been loyal to Scotland for years but to market any other availability to higher spending Scandinavians. After all, it is five times cheaper to serve loyal customers than trying to gain new ones. However, Scotland does have the potential to attract higher spending anglers from overseas who bring in foreign exchange earnings and spend on other activities. In addition there is no reason why they

will not also become loyal, repeat customers and continue to contribute significantly to the Scottish economy in the longer term – as long as their aspirations are met.

6.7 RECOMMENDATIONS FOR FUTURE RESEARCH

Should Scandinavian (and in particularly Norwegian) anglers be targeted for a Scottish salmon angling marketing campaign then it is recommended that further detailed research be conducted to identify and evaluate potential client needs and expectations with regard to salmon fishing holidays. Whilst the act of fishing will normally be the most important aspect of the holiday it is highly likely that, with regard to the other aspects of the holiday (accommodation, food, other activities, etc), Norwegians, Swedes and Finns will have somewhat different wants and needs based on their cultural backgrounds, and it is equally important to understand what they don't want or need. If these expectations can be fully catered for then it is far more likely that a strong body of repeat trade will be built up over time.

This research would ideally be conducted through written questionnaires augmented by face-to-face interviews to negate any issues or confusion arising from respondents who use English as a second language. The face-to-face interviews would include fishery industry experts from Scotland to enable in-depth discussions with the interviewees on the pros, cons and technical aspects of salmon fishing in Scotland.

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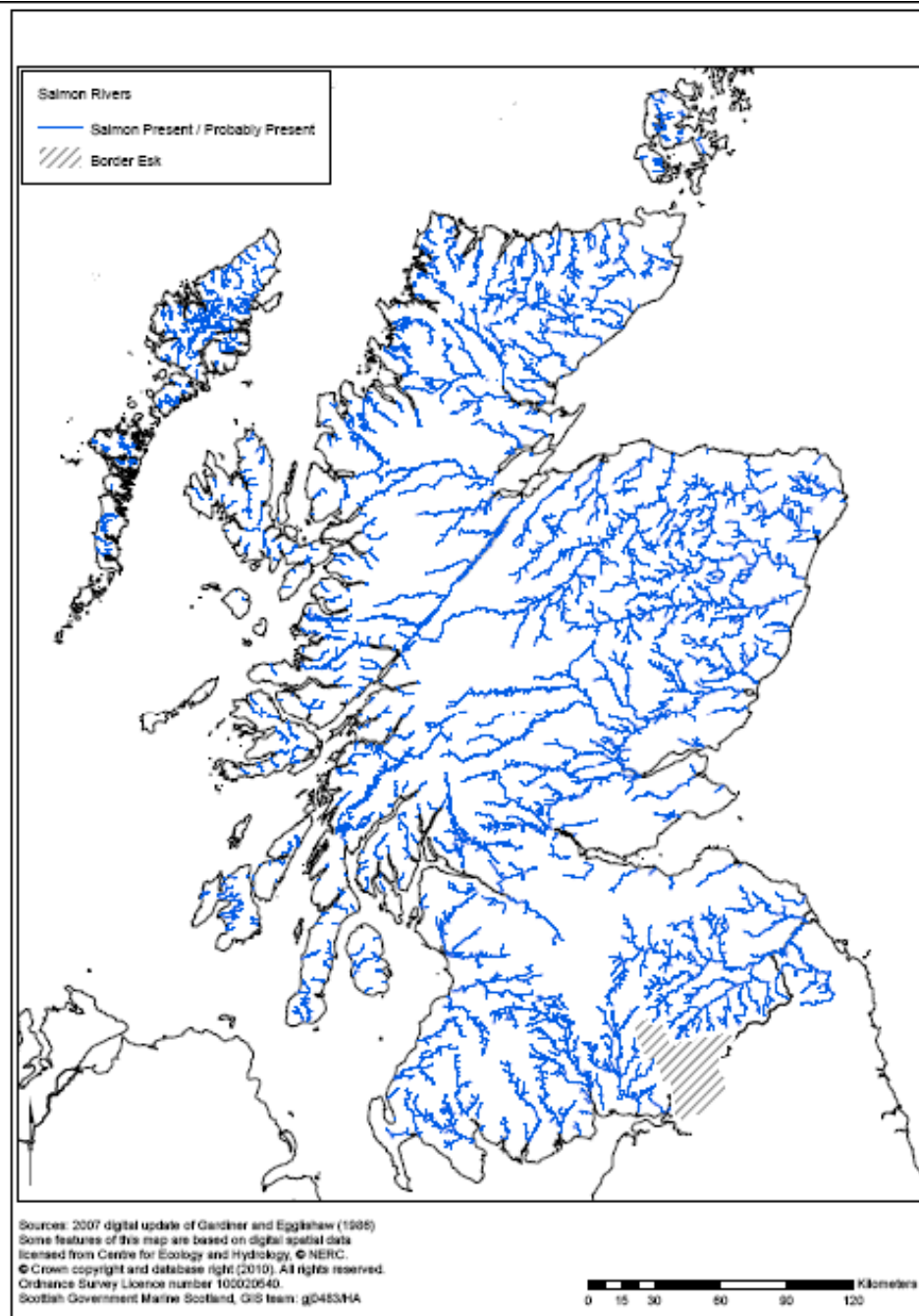
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APPENDIX

Appendix 1: Map of salmon rivers in Scotland (Malcolm: 2010)



Appendix 2: (Online) Questionnaire

PAGE 1 WELCOME!

Thank you for taking part in this research that will hopefully result in the long term improvement of your salmon angling experience in Scotland.

This survey is aimed at salmon anglers who DO NOT live in Scotland and HAVE ALREADY BEEN to Scotland on a salmon angling holiday.

All information is strictly confidential and will be collated for the purposes of writing an honours dissertation. No individuals will be identified within the dissertation.

This survey should only take around 15 minutes of your time. Please note that when talking about salmon fishing, we also include fishing for the sea trout.

ONE LUCKY PARTICIPANT WILL WIN A FISHPAL FISHING VOUCHER WORTH £100!!!
(Please leave your email address at the end so we can contact you)

Thank you in advance for taking the time to help.

Best wishes,

Eva Serencisova
University of Stirling
Scotland

PAGE 2 TELL US SOMETHING ABOUT YOURSELF

1. Where do you live?

- Scotland
- England/Wales/ N. Ireland
- EU/EEA
- United States
- Other

2. Have you fished in Scotland for salmon before?

- Yes
- No

PAGE 3 TELL US SOMETHING ABOUT YOURSELF

3. Gender

- Male
- Female

4. What nationality are you?

- British
- EU/EEA
- United States
- Other (please specify)

5. How long have you been a salmon angler?

- less than 5 years
- 6 - 10 years
- 11 - 15 years
- 16 - 20 years
- 21 - 25 years
- over 25 years

6. Have you fished in Scotland for species other than salmon?

- Trout and grayling fishing
- Coarse fishing
- Sea fishing
- No, I have not

7. How old are you?

- Under 24
- 25 - 34
- 35 - 44
- 45 - 54
- 55 - 64

- 65 - 74
- Over 75
- Prefer not to answer

8. What is your annual income?

- Less than £9,999
- £10,000 - £19,999
- £20,000 - £29,999
- £30,000 - £49,999
- £50,000 - £74,999
- £75,000 - £99,999
- £100,000 plus
- Prefer not to answer

9. What is your occupation?

- Owner/ Proprietor
- Senior Management
- Other Management
- Professional
- Technical
- Sales
- Administrative
- Other employed
- Home-maker/Full-time parent
- Student
- Retired
- Not employed
- Prefer not to answer

PAGE 4 ABOUT YOUR SALMON ANGLING HOLIDAY IN SCOTLAND

10. How many times have you taken a salmon fishing holiday in Scotland in the last five years?

- once
- 2 - 3 times
- 4 - 5 times
- more than 5 times

11. How many days, on average, do you tend to stay in Scotland during each fishing trip?

- under 3 days
- 4 - 7 days
- 8 - 10 days
- 11 - 14 days
- over 14 days

**12. Which rivers in Scotland have you fished on?
(tick all that apply)**

- Annan
- Ayrshire rivers
- Beaully
- Border Esk
- Dee (Aberdeenshire)
- Deveron
- Don
- North & South Esks
- Far North rivers
- Findhorn
- Galloway rivers
- Nith
- Hebrides
- Spey

- Tay
 - Tweed
 - Other (please specify)
-

13. Do you go fishing for salmon in other countries?

- No
 - Yes - please specify
-

14. How much do you tend to spend per day (including VAT) on your fishing permit in Scotland? Please exclude ghillie tips.

- under £100
- £100 - £249
- £250 - £399
- £400 - £599
- £600 plus

PAGE 5 – ABOUT YOUR SALMON ANGLING HOLIDAYS IN SCOTLAND

**15. Who accompanied you on your fishing holidays to Scotland?
(tick all that apply)**

- I came alone
- Non-angling husband/wife
- Angling husband/wife
- Non-angling friend
- Angling friend
- Non-angling children
- Angling children
- Other

16. Was salmon fishing your main purpose for visiting Scotland?

- Main purpose
- Main purpose but I also did other things
- Fishing is secondary to the main holiday

17. Did you participate in activities other than fishing whilst on your holiday in Scotland?

- Eating out
- Going for a walk
- Visiting historic sites
- Sightseeing by car
- Shopping for gifts
- Other (please specify)

18. Excluding fishing permits, what was your average total expenditure per day whilst on holiday in Scotland?

- under £100
- £100 - £200
- £200 - £300
- £300 plus

19. Where did you find out information about salmon fishing in Scotland?

- Advice from friends and family
- Angling magazines
- Tourist Board brochures
- Internet
- Other (please specify)

20. How did you book your fishing in Scotland?

- Directly with the fishery
- Internet booking
- Booking agent
- Other (please specify)

21. Are you planning to fish for salmon in Scotland in the next twelve months?

- Yes
- No

22. If no, why?

- Less free time
- Increased family responsibilities
- Cost of travel/ accommodation
- Cost of fishing permit
- Likelihood of catching fish
- Fishing in another country
- Bad experience
- My age
- Other interests

PAGE 6. YOUR ATTITUDESTOWARDS SALMON FISHING IN SCOTLAND

23. Please rate the importance of the following:

***(NOTE: 4 point scale – 1 strongly disagree, 2 disagree, 3 agree, 4 strongly agree)**

I would rather catch one or two big fish than lots of small fish
The more fish I catch the happier I am
Having some chances of catching is necessary for me to be satisfied
I can enjoy a fishing trip even when I don't catch any fish
I must keep the fish I catch for the trip to be successful
I am happy to return all fish caught

24. For this question please grade each statement in order 1 to 6.

In other words number 1 describes you most, number 6 describes you least.

Each statement should have a different number.

***(NOTE, six point scale – 1 most describes, 6 least describes)**

I would rather catch one or two big fish than lots of small fish
The more fish I catch the happier I am
Having some chances of catching is necessary for me to be satisfied
I can enjoy a fishing trip even when I don't catch any fish
I must keep the fish I catch for the trip to be successful
I am happy to return all fish caught

25. Please rate the importance of the reasons why you came to Scotland to fish?

***(NOTE, six point scale – 1 not at all important, 6 very important)**

Experiencing nature
Stress release
Being with friends/family
Keeping fit
Catching fish
Achieving/ Competence testing
Escaping/ Solitude
Discovering new places
Seeking excitement
Other (please specify)

26. What are your attitudes towards fisheries management actions relating to salmon angling in Scotland?

***(NOTE, 4 point scale, 1 strongly disagree, 4 strongly agree, I don't know is last option)**

Need to reduce pollution

Make salmon fishing in Scotland 100% catch & release to help increase fish stocks

Reduce number of fishing permits

Cancel catch & release

Increase expenditure on habitat improvements

Better facilities (more boats, toilets etc.)

Better service

Other (please specify)

27. Please rate according to your satisfaction?

***(NOTE, 4 point scale, 1 strongly disagree, 4 strongly agree)**

Quality of fish

Size of the fish

Numbers of fish caught

Ease of travel to angling location

Price of angling permits

Value for money

Accessibility (in case of physical disability)

Crowding

Ease of finding angling information

Ease of booking

Catch & release regulations

Quietness of place

Scenery and wildlife

Quality of accommodation

Quality of food

Quality of eating out opportunities

Quality of service

Safety

Friendliness of local people

PAGE 7 YOUR IDEAS ON IMPROVEMENT

This is the last part of our survey. It gives you the opportunity to comment on what you like about salmon fishing in Scotland and what you would like to see improved.

28. What inspired you to go salmon fishing in Scotland in a first place?

29. What is it that you find so special about Scotland in general?

**30. What is that Scotland has as a salmon destination that others do not?
In other words, why do you choose to fish for salmon in Scotland and not elsewhere?**

**31. Was there anything you disliked about your holiday to Scotland?
This can be related not only to fishing but to any part of your trip.**

32. Is Scotland, as a salmon fishing destination, lacking anything? What do you think could be improved?

PAGE 8 LAST PAGE!

33. Have you got any other comments in regards to salmon fishing in Scotland?

34. If you are happy to be contacted for further enquiries then please leave your email address:

Thank you for taking part in this survey. Hopefully the results will be used to help improve the overall salmon angling experience in Scotland.

Best wishes

Eva Serencisova
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Scotland