

'GAME FOR GROWTH' COUNTRY SPORTS TOURISM IN SCOTLAND: DELIVERING SUSTAINABLE GROWTH 2016-2020: A STRATEGY



Realising the potential of Scotland's country sports tourism

SCOTLAND

A UNIQUE COUNTRY SPORTS DESTINATION

COUNTRYSPOORTSCOTLAND.COM

‘Game for Growth’ – Country Sports Tourism in Scotland: Delivering Sustainable Growth 2016-2020: A Strategy

Introduction

Established in 2004, the SCSTG focuses on developing the country sports tourism sector in Scotland, today worth around £155m per year. The SCSTG works in partnership with numerous organisations, including the Association of Deer Management Groups; the Association of Salmon Fishery Boards; BASC; Scottish Land and Estates, Scottish Enterprise and Visit Scotland, Scottish Natural Heritage and Highland and Islands Enterprise.

Achievements include a state-of-the-art website promoting sporting providers, agents and accommodation, research into the country sports sector, running sporting days and taster evenings, engaging with journalists from all over the world, and attending numerous fairs both in the UK and overseas.

The research commissioned on the 10th anniversary of the group’s formation laid the foundations to develop this strategy and take the group forward.

Membership of the Scottish Tourism Alliance (STA) provides the SCSTG with important links and networking opportunities to help inform Government Ministers, the Scottish Government and other outdoor based tourism sectors of the many benefits of country sports including well-being, access and conservation.

We are very grateful to Marc Crothall, CEO STA, for writing a foreword for the SCSTG strategy, 'Game for Growth'.

Sarah Troughton
Chair SCSTG



Foreword

Scotland is an unrivalled country sports destination. We are widely recognised as the birthplace of many of the world's premier country sports and annually draw a significant number of domestic and foreign audiences to enjoy the field sports opportunities available the length and breadth of the country.

The value of tourism from the country sports sector is expected to increase to £185 million by 2020, bringing further economic gains to rural communities.

Key to delivering this ambitious growth target will be the introduction of a more strategic, proactive industry-led approach, providing a more solid foundation for the future marketing and product development activities planned by the Scottish Country Sports Tourism Group (SCSTG). This is the first national strategy that has been developed by the SCSTG on behalf of the country sports tourism sector and will undoubtedly enable individual businesses to make better-informed investment decisions to attract both the domestic and overseas markets and maximise these growth opportunities.

'Nature and Activities' is one of the 'assets' identified in the National Strategy: Tourism Scotland 2020 which was developed to target the markets that offer Scotland's tourism industry the greatest growth potential, and encourage collaboration within and across Scotland's destinations to develop authentic, memorable experiences for visitors.

The new Scottish Country Sports Tourism Group strategy clearly shows how the sector, together with public agencies and other partners, will work together to build on the current strong foundations and provide their contribution to delivering the Tourism Strategy growth target of a £1bn increase by 2020.

This marks an important milestone in the development of a more formalised framework and I have no doubt that this will bring about the collaboration and engagement required to maximise the opportunities within the country sports tourism sector and deliver its 20% growth ambition.

Marc Crothall
CEO STA

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Executive Summary

Scotland's Country Sports – The Scottish Experience – it is not just the sport

Our cultural identity and heritage – Scotland's culture and heritage has a strong pull with our rich history and our world-famous food and drink, as well as contemporary cultural events.

Our people – Scotland is known for the friendliness of the welcome and the passion of our people. The people of Scotland are proud and have a strong sense of their identity. Our people are ideal ambassadors for Scotland and for all that is Scottish.

Our natural environment – Scotland has a rich array of beautiful and dramatic landscapes ranging from mountains to lochs to beaches and an array of magnificent islands. Our landscapes are both diverse and unique.

Our sport – with its traditions and long-established practices such as using Highland Ponies to extract the deer and the quality and sustainability of the quarry whether it be red deer, red grouse or wild brown trout.

Vision for the Industry

'By 2020 Scotland will be a Country Sports tourism destination of first choice known for a sustainable, high quality, uniquely Scottish, experience delivered by a skilled, knowledgeable and customer focussed industry with something for every country sports person.'

A Strategy for Growth

To support this vision, this market driven strategy will promote the growth of country sports tourism aligned with the following key objectives:

Key Objectives

- a:** Adopt a consistent approach to the presentation and delivery of Scotland as the global destination of first choice for country sports
- b:** Encourage a customer focussed approach by gathering quality visitor data, sharing market intelligence and best practice from other successful destinations as well as regularly sharing research findings with the industry in order to promote evidence-based decision making. We will also seek the development of new products
- c:** Strengthen industry leadership/engagement at a national level
- d:** Increase visitor numbers, visitor spend and repeat visits by improving the quality of the overall "Scottish Experience"
- e:** Maximise the visitor impact by removing the barriers to growth, capitalising on the known scale of opportunity that exists within the country sports tourism sector to 2020.

1. Introduction

Scotland is widely recognised as the birthplace of many of the world's premier country sports.

Country sports are defined as:

- Legal shooting of birds or animals: driven and walked up shooting of game and other quarry species when in season, as well as the stalking of deer with a rifle.
- Fishing activity: game angling, coarse and sea-fishing.
- Clay pigeon shooting: shooting with a shotgun at artificial flying targets, known as clay pigeons.
- Target shooting: small bore and full bore rifle shooting and air weapon target shooting

Scotland's country sports sector contributes almost one million nights to the nation's tourism sector.

According to a report compiled by TNS in 2004, country sports were estimated to be worth in the region of £200m per year direct spend to the Scottish economy with freshwater angling comprising circa £113m and shooting/stalking accounting for circa £80m of that total. The tourism element of this was estimated at £135M. More recent research conducted by PACEC (2015)*, revealed that overnight visitors made 270,000 country sports trips comprising 910,000 visitor nights with an estimated tourism expenditure in 2013 of £155m. The ADMG PACEC study published 2016 put the total direct and downstream value of deer management in Scotland at £140m.

Yet this figure does not include the 'ripple effect' that these visitors have on the wider economy of Scotland, which includes the domestic consumption and direct sale of game and venison.

Both sets of baseline figures underline the significance of the country sports industry to rural Scotland and in recognition of its importance as a key tourism asset, the Scottish Country Sports Tourism Group (SCSTG) was established over a decade ago in response to demands for an industry-led body with a pan-Scotland remit. The overall aim of the SCSTG is to promote and develop the potential of the country sports tourism industry by working to help the sector enhance both the product offer and the visitor experience and so not only retain but grow existing and new markets. This is particularly relevant in the light of significant competition from some of the new European destinations.

Since its inception, the SCSTG has evolved into a well-established and respected representative body that has pioneered a number of initiatives designed to realise business development opportunities within the sector at large.

{*Footnote: The PACEC Report focussed solely on the economic impact of overnight tourists and did not take into account the day trip market.}



Significantly, it is one of the few tourism groups which is now wholly self-financing, requiring no core funding support from the public sector. The SCSTG is an effective, “fit for purpose” organisation that responds well to the business development needs of the industry in a sustainable manner.

Over the past decade, country sports tourism in Scotland has benefited from the work of the SCSTG designed to address the needs of the industry. Welcome though these initiatives undoubtedly have been, a review of the current approach is required if current market share is to be maintained and the potential growth opportunities are to be maximised. Following consultation with the industry, policy makers and other stakeholders, the time is now right for the SCSTG to publish, promote and pursue a new strategy. This articulates a future vision of the Country Sports Tourism sector, helps identify its growth potential and how the scale of opportunity might be realised through a transparent Action Plan for the short, medium and longer term.

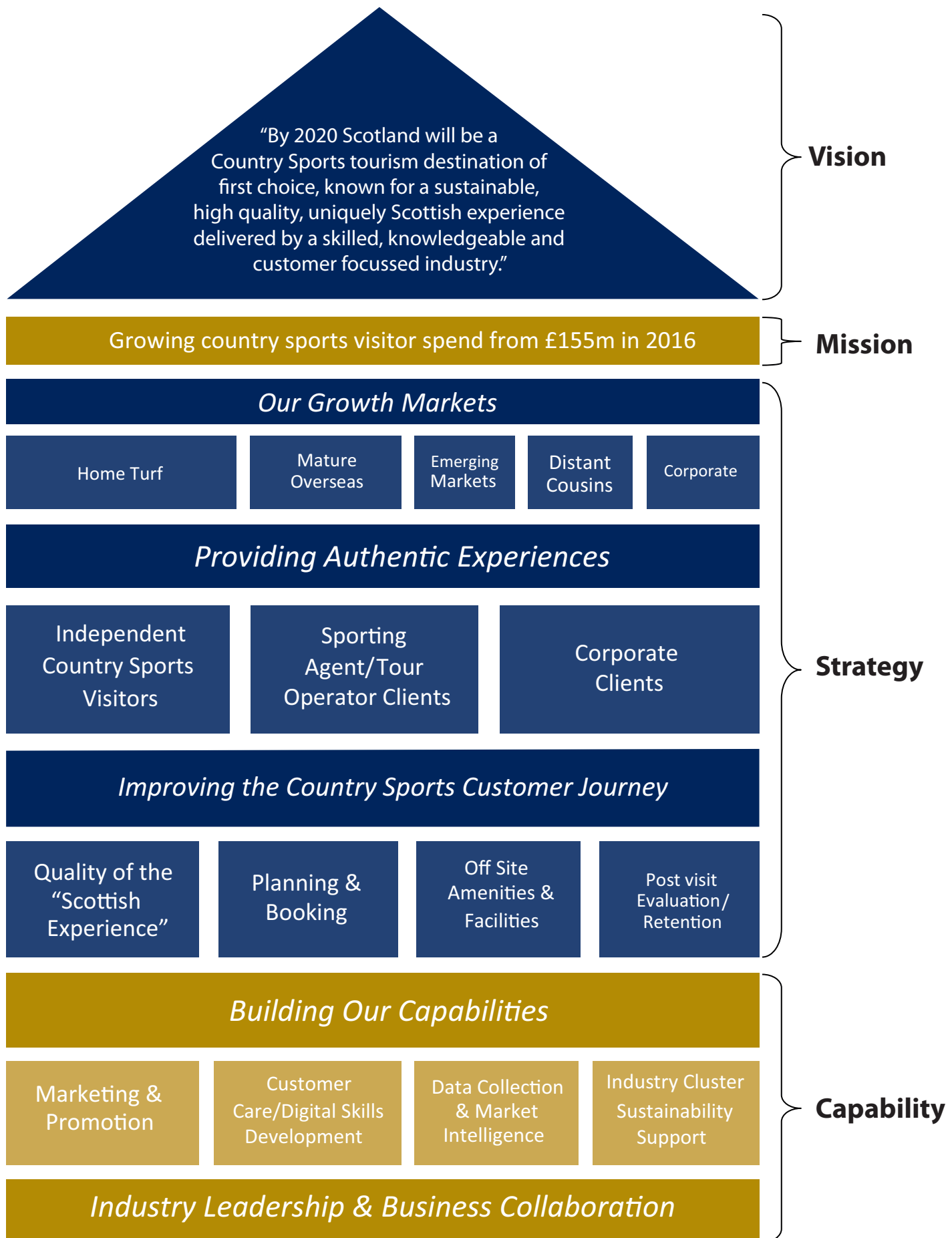
The Strategy will help raise the profile of the industry amongst Scottish Government ministers, local authorities and other key opinion formers. It will also help provide a sense of direction and focus for individual businesses to collaborate more effectively to provide a more coherent customer offer and, importantly it will underpin efforts to secure investment in its delivery.

In particular, the need for a new dedicated strategy has been prompted by:

- Formal recognition of country sports as one of the growth sectors in the Nature/Heritage/Activity assets identified in the national tourism strategy document ‘Tourism Scotland 2020’
- Awareness of the need to adopt a more proactive industry-led approach in meeting the needs of the country sports sector
- Increasing overseas competition and the desire to embed a more international approach into SCSTG project delivery
- The publication of the PACEC Report 2014 which provides much needed baseline statistics and data for the benefit of the SCSTG partners and individual businesses alike
- The expected growth prospects of the country sports tourism sector to 2020
- Challenges that could arise from the land reform recommendations.
- Sporting rates will challenge the sustainable pricing of country sports.

The publication of this strategy therefore signals a renewed commitment by all those involved in identifying the growth potential of country sports tourism within Scotland. It has been drawn up by the Strategic Sub Group of the SCSTG comprising Scottish Land and Estates, the Association of Deer Management Groups, Scottish Natural Heritage, Visit Scotland and Scottish Enterprise following an extensive consultation with a range of key industry partners.

In policy terms, the strategy is entirely consistent with, and closely aligned to, a number of other national and regional strategies. The Land Use Strategy and the country sports tourism element can and do deliver multiple benefits – economic (to tourism and businesses but also providing funds for investment in the management of the resource), social (recreational/health) and environmental (sometimes as the primary land use but almost always alongside other uses). It can also contribute to the Tourism 2020 vision to increase the value of tourism to the Scottish economy by over one billion pounds.



2. The Present Position

2.1 Product Offer

The range of quarry species and their open seasons is vast. Participation in country sports of one form or another in Scotland is possible 365 days of the year.

With a population of around 5 million, Scotland is fortunate in having extensive areas where country sports can be enjoyed alongside a wide range of other outdoor activities. Scotland is home to deer and many species of game birds as well as having many salmon rivers and freshwater lochs. Overwintering, migratory waterfowl and waders number in the millions. Scotland, and in particular upland Scotland, which represents 40% of the country, is recognised as a supreme country sports venue offering a unique blend of high quality, professionally managed stalking, shooting and fishing experiences set in a stunning natural and cultural landscape.

Each year 8,100 paid equivalent full-time positions are supported by the expenditure of country sports visitors. Compared with other tourism sectors, therefore, the country sports industry is less prone to seasonality, a situation which is of particular benefit to remote, fragile rural areas which otherwise generate little economic activity during the so called “shoulder” months in low season.

2.2 Accessibility

In terms of its transport infrastructure, Scotland offers easy access to participation in all sections of the country sports market. This may account for the vast majority, 90%, of country Sports tourists originating in the UK. Increasing the number of non UK Tourists may be possible; aligning knowledge of new routes as airlines introduce them will undoubtedly afford a ‘targeted’ marketing opportunity.

Although the evidence is anecdotal there are perceptions of elitism and high cost of participation in some areas of country sports. One of the aims of this strategy, therefore, is to dispel such outmoded perceptions of the industry as well as address the issues of accessibility, particularly in respect of new entrants to the sport. Within Scotland, opportunities exist to suit all budgets, ranging from as little as £2 per day to £10,000 per week and more. From a tourism perspective, the country is steeped in history, tradition and culture which provide the sporting visitor with what many across the world regard as an unrivalled “Scottish Experience.”

Notwithstanding Scotland’s growing air connectivity, the rural location of the majority of country sports activities does have implications for access for those without their own transport; a situation which offers a business opportunity to sporting agents and local transport providers alike.

The nature of the activities themselves also has implications for those less physically able, although the introduction of ‘wheely boats’ does offer some disabled access to loch and river fishing. Some sporting providers and BASC will assist with disabled access to shooting with each individual situation assessed. Other disabled access to shooting is available, primarily at indoor rifle and pistol shooting ranges. Although there has been some progress with regards to clay trap shooting at clay shooting grounds, it is not yet widely accessible.



The following links provide additional information and developments with regards to disabled access: <http://www.wheelyboats.org/>, <http://www.disabilityshooting-gb.org/events/> and <http://www.disabilityshooting-gb.org/>

The potential of this market is large as evidenced by the following web link: <http://blog.wtmresponsibletourism.com/2013/09/17/accessible-tourism-largest-travel-market/> Given the country sports participants' age profile and anecdotal evidence of estate owners' own experience of an ageing client base, this may have implications should the industry fail to attract a younger clientele.

There are issues with digital access in some rural areas which may impact on country sports businesses.

2.3 Sustainability

Country sports shape our countryside; from peatland and moorland to the more fertile farmland of the glens and arable areas including areas of ancient and native woodland and plantations, lochs and rivers.

40% of Scotland is open heather moorland where the most important driver of sustainable environmental management is the red grouse. Research has shown that good grouse moor management not only benefits the grouse, but many other upland bird species as well. Good management involves the legal control of pest and predatory species. Without moorland management for grouse, much of our open upland landscape would be lost.

In most areas of the Highlands, red deer populations have been reduced by culling over recent years to levels which are consistent with a healthy upland environment, particularly where sheep numbers have also been reduced.

Sporting interests also maintain the condition of many of Scotland's rivers and lochs, which are important for trout and salmon fishing. Ongoing management includes restocking, improving the river beds, reducing predation and illegal fishing, and introducing catch and release policies on many rivers. The Scottish Government's Wild Fisheries Review has now overtaken the catch and release policies of individual owners/Boards.



Businesses operating in the sector also invest hundreds of millions of pounds in conservation of the landscape which supports them.

2.4 Competitive Advantage

Key competitors are mainly Scandinavia, Ireland, England and Russia, with emerging provision from former eastern European countries.

From the Highlands to the Borders, country sports visitors make trips to every corner of Scotland. This type of tourist makes multiple trips each year, visiting multiple regions in Scotland – often within the same visit.

Generally the core market for country sports is male; 85% of shooting tourists are over 40 years, 90% of fishing tourists over 45 years, with 68% over 55 years. Nearly a third of the country sports visitors come from Scotland, more than half come from England and 15% come from overseas, mainly Europe and North America.

The visitors, predominantly from elsewhere in the UK, generally make between four and seven trips to Scotland per year. More than half stay in a hotel and just over half will stay for six nights or fewer, travelling with two to four companions, spending between £1,000 and £9,000 per group, per trip.

Although there is some overlap in the different sports in which visitors participate, only 10%-15% of visitors come to Scotland on a dual country sports activity trip. However, all visitors do participate in other forms of tourism – sightseeing, visiting attractions and other sporting activities such as golf and mountain biking.





While Scotland is a world leader in country sports, visitors regularly cite the activity as secondary to the other qualities that the country offers – such as scenery, tradition, and privacy.

Like any industry, there are challenges facing the sector. Technology, bookings and management, and perceived value for money, as well as the overall impact of rising costs, are obvious factors. Specific to country sports, challenges also include the regulatory environment and declining stocks of some quarry (i.e. hunted) species, in particular the decline and vulnerability of fish stocks. Conservation pressures and public access also have an effect on management of land for country sports.

Yet despite these challenges, the country sports sector is enjoying steady and continued growth – the value of the overall tourism sector and related businesses to the Scottish economy has grown in excess of £120 million in the past nine years (country sports tourism specifically by £25 million), despite tough economic conditions. This has been brought about by the sector embracing change to suit the needs of the country sports tourist. Opportunities for further growth do not only exist within the sector, but for a wide variety of other tourism businesses which can benefit from supporting the country sport providers.

Many country sports providers are well established in the sector and most have developed their product to reflect the natural strengths of Scotland and the changing requirements of participants from increasingly wider markets. Many have moved with the times and diversified what they offer to include accommodation; however, there are still many other opportunities to develop activities or services which may be of value to visitors during their stay, or which might attract new visitors.

Scotland faces tough and growing competition in the international country sports tourism market. The recent launch of Eagle Review, a new internet tool that helps participants pick their ideal shooting or fishing destination, a type of TripAdvisor for country sports, shows that competition is fierce. There is pan-industry recognition that proactive initiatives need to be implemented across product, business development, customer service, marketing, research, skills training and innovation if the challenges faced by this sector are to be met.



3. Scotland's Country Sports – The Scottish Experience – it is not just the sport

Our cultural identity and heritage – Scotland's culture and heritage has a strong pull with our rich history and our world famous food and drink, as well as contemporary cultural events.

Our people – Scotland is known for the friendliness of the welcome and the passion of our people. The people of Scotland are proud and have a strong sense of their identity. Our people are ideal ambassadors for Scotland and for all that is Scottish.

Our natural environment – Scotland has a rich array of beautiful and dramatic landscapes ranging from mountains to lochs to beaches and an array of magnificent islands. Our landscapes are both diverse and unique.

Our sport – with its traditions and long established practices such as using highland ponies to extract the deer and the quality and sustainability of the quarry whether it be red deer, driven red grouse or wild brown trout.



4. Issues and Opportunities

4.1 SWOT Analysis

What specific issues therefore do the industry and its partners need to address over the next 5 years?

Based on the Benefits, Volume and Value of Country Sports Tourism in Scotland Report (PACEC) an initial SWOT Analysis, which will form an outline for the sector has identified the following:

Strengths

- Heritage / authentic / long tradition of country sports in Scotland
- Exclusivity of product offer in unspoilt, spectacular and dramatic “wild” landscapes
- Generally good transport accessibility for domestic and overseas visitors alike
- Extensive market intelligence and baseline research
- Reputation of Scotland as a quality destination for stalking/shooting and fishing
- Industry knowledge and unique country sports experiences e.g. ghillies/guides/garrons (Highland Ponies)
- Fit for purpose SCSTG with proven track record and high quality web portal www.countrysportscotland.com
- Stalking/shooting and fishing tends to be more recession proof than other tourism activities
- Economic activity in remote areas.

Weaknesses

- Fragmented industry especially at local level
- Perceived high cost sport (lack of awareness of different levels on offer)
- Lack of spare capacity in respect of high end product offers
- Inconsistent product offer with patchy customer care
- Poor awareness by consumers as to how to participate in the country sports sector
- Industry apathy in some quarters
- Ageing visitor profile
- Negative perceptions of the weather
- Participants predominantly male.



Opportunities

- Policy recognition that country sports sector is now a key all year round tourism asset especially during the “shoulder” months
- Corporate and Incentives market (possibly via B2B routes)
- Recent Scottish Government support for country sports and a recognition that the sector makes a significant contribution to the rural economy of Scotland as well as providing conservation benefits
- Cross-selling country sports packages with other tourism activities e.g. golf, wildlife watching, camera safaris sightseeing/walking
- Scope to introduce and encourage more country sports familiarisation trips/media exposure
- Scope for so called “lesser” species such as roe deer stalking/ brown trout, char, etc. to be better utilised as genuine tourism assets
- Opportunity for shorter let, mixed species visitor packages
- Scope for more events/festivals/guiding/ tuition initiatives e.g. McNab type Packages, Scottish Wild Brown Trout Challenge
- Develop International market to target demand from Scandinavia and USA
- Potential new community/business opportunities as a result of the emergent Land Reform/Wild Fisheries Review legislation.

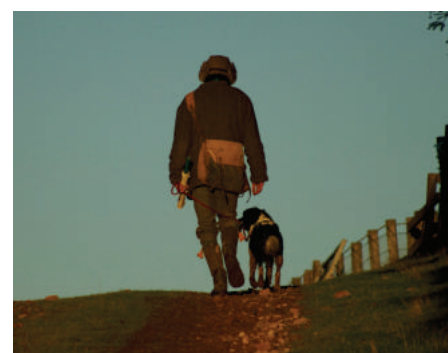
Threats

- Anti-hunting lobby and broader negative perceptions
- Adverse publicity e.g. raptor poisoning
- Bio-security – diseases ‘imported’ by transferring from rods or boots
- International competition including ‘new and exotic’ alternatives for country sports enthusiasts
- Perceptions of elitism
- Declines of some quarry e.g. Atlantic Wild Salmon
- Reluctance of some providers to embrace change
- Prolonged recession linked to an unwillingness/inability to invest in the product offer
- Lack of business collaboration within the country sports tourism industry
- Lack of collaboration with other tourist sectors, e.g. accommodation providers
- Or reverse can be true – reluctance to gather and use market intelligence to inform future product development and marketing efforts
- Reduction/withdrawal of inbound flights from key markets
- Industry uncertainty surrounding the emergent Land Reform/Wild Fisheries Review legislation
- Climate Change
- Sporting rates.



5. Vision for the Industry

Based on this market analysis, the strengths of our country sports sector as well as Scotland's global appeal for fishing, shooting and stalking opportunities, the overall vision for the industry is that 'By 2020 Scotland will be a country sports tourism destination of first choice known for a sustainable, high quality, uniquely Scottish, experience delivered by a skilled, knowledgeable and customer focussed industry with something for every country sports person'.



6. A Strategy for Growth

To support this vision, this market driven strategy will promote the growth of country sports tourism aligned with the following key objectives:

What strategic objectives are the partners committed to in pursuit of this overall vision?

6.1 Key Objectives

a: Adopt a consistent approach to the presentation and delivery of Scotland as the global destination of first choice for country sports.

This requires building on the brand strength of our unique “Scottish experience”. Scotland’s reputation as a globally important country sports destination is based on a warm welcome, outstanding landscapes and scenery, comfortable accommodation with great Scottish food, consistent high standards of service and exceptional variety, quality and sustainability of sport; something for everyone whatever their interest, ability and wealth. All of this falls within a rich cultural and historic heritage.

Action

- Encourage greater use of the online B2B resource, Country Sports Business Toolkit, to increase awareness amongst country sports providers and wider tourism businesses to ensure knowledge and understanding of what is available and when, particularly the availability of sport in shoulder and winter months.
- The unique nature of participation in country sports in Scotland such as the use of hill ponies should be highlighted.
- The quality of the sport available, particularly red grouse and red stags must be highlighted as well as the sustainable way in which these iconic species and their environment are managed.
- Encourage greater participation in the ‘Excellence in Country Sports Customer Care’ course to ensure the sector delivers to customers’ expectations. Make the training available to the three colleges delivering game keeping courses.

b: Encourage a customer focussed approach by gathering quality visitor data, sharing market intelligence and best practice from other successful destinations as well as regularly sharing research findings with industry in order to promote evidence-based decision making. Development of new products.

Gathering and using good market intelligence to drive innovation is an effective way to improve business performance. Collecting data on volume and value is crucial to demonstrate trends in the number of visitors and the contribution that stalking/shooting and fishing make to the tourism economy. Information gathering is pivotal for marketing and developing the country sports tourism product, yet few sports and accommodation providers know who their markets are, where they come from, how often they visit, etc. The lack of availability/sharing and use of market intelligence will therefore be tackled as an integral part of any business workshops, based on the findings from the recently launched PACEC Study and other market intelligence reports.

Action

- Monitor and analyse Google Analytics, communicate results to subscriber businesses highlighting where www.countrysportscotland.com visitors originate from and the search terms being used
- Monitor and analyse VisitScotland data and findings from PACEC to increase sector awareness
- Communicate broader market intelligence via newsletter
- Monitor current and emerging air routes to Scotland to build engagement with new and existing markets
- Development of responsive website (achieved June 2016)
- Communicate affordable, accessible and sustainable message of country sports in Scotland to home turf and near neighbours to contribute towards increasing the value of the sector by £30m (20%) by 2020. This equates to approximately 4% or £6m growth per year
- Attendance in person or via partners at UK Game and Country Fairs and carefully selected foreign fairs is crucial to maintaining and growing market share.

c: Strengthen industry leadership/engagement at national level

Fostering better industry leadership is a key principle of the National Tourism Strategy 2020 and one which has to be similarly embedded within the Country Sports Tourism Strategy. Recognising the pivotal role of SCSTG will therefore be a priority to demonstrate fully its credentials to promote the country sports sector in Scotland supported by organisations representing all the main country sports segments.

Action

- Continued participation on Outdoor Tourism Group of STA and attendance at Scottish Parliament's Cross Party Group on Tourism are seen as crucial to highlight the benefits, volume and value of country sports tourism in Scotland
- Maintain broad Board membership, inviting industry leaders to participate when gaps in knowledge identified
- Ensure wider Scottish tourism industry is aware of the affordability and sustainability and conservation and health benefits of country sports.

d: Increase visitor numbers, visitor spend and repeat visits by broadening and improving the quality of the overall "Scottish Experience"

Country sports businesses need to develop diagnostic skills and collaborative techniques to participate in the growth agenda, and capitalise upon the opportunities of attracting and delivering a quality "Scottish Experience" ensuring that their product offer is still at the forefront of choice for visitors.

Understanding a visitor's motivations, attitudes, needs and expectations in more detail will enable the industry to better develop the country sports product offer to ensure that Scotland outperforms its global competitors.



Action

- From analysis of market identify and target potential growth areas
- The Scandinavian market has been identified as relatively untapped in terms of marketing of Scottish Country Sports. Existing air transport links are good and www.countrysportscotland.com analytics have shown Denmark, Norway and Sweden ranking in the top 7 originating countries. Accessing funding via the VisitScotland Growth Fund could provide the necessary financial assistance to help promote Scottish country sports tourism in these markets.
- Collaborative marketing with subscriber businesses to promote the wider Scottish country sports tourism offer at a greater number of international hunting and fishing trade fairs, in particular to 'Distant Cousins' and 'Emerging Markets'.
- Continue to support subscriber businesses through social media promotion.
- Expand Social Media to include targeted messages in indigenous languages.
- Maximise use of new VisitScotland website and marketing tools. Country sport added to 'Content Calendar' monthly themes. Participation in the I-know Scotland Community.
- Faster broadband speeds and increased mobile coverage in rural areas is an urgent requirement. STA may provide means of achieving this.
- Monitoring and embracing developments in social media and sites such as Airbnb (Destination Guides) and Weshoot App must be prioritised to ensure opportunities are not missed.
- Introduce a customer satisfaction survey to measure experience. There may be an opportunity to add functionality to www.countrysportscotland.com to allow country sports participants to rate/review their experience of a provider.

e: Maximise the visitor impact by removing the barriers to growth, capitalising on the known scale of opportunity that exists within the country sports tourism sector to 2020

The barriers to growth include a lack of cooperation and sense of common purpose between providers. This applies not only to country sports businesses but also the other sectors which play a part in providing a seamless and complete visitor experience, e.g. accommodation providers, transport and specialist services such as sporting shops, gunsmiths and fishing guides. This strategy will provide for industry education and training to address these shortcomings and promote consistency across all levels of country sports provision.

Action

- Establish geographical, cross sector country sports promotional groups similar to the Ayrshire and Arran group
- Develop more collaborative working with subscriber businesses who attend international hunting fairs to help facilitate dissemination of Scottish Country Sports information to 'distant cousins' and 'emerging markets' to contribute to increasing the value of the sector by £30m (20%) by 2020. This equates to less than 4% or £6m growth per year.

As part of the strategy preparation process, the SCSTG has identified a number of potential growth opportunities that are worthy of future action. At this stage, the following list is not exhaustive but rather indicative of the type of growth opportunity that needs to be pursued by the industry at large.

How will the partners tackle these key objectives in practice?

7. Guiding Principles

A number of guiding principles have been identified which will underpin these key objectives and help the Strategy to:-

- Foster a co-ordinated and industry-owned approach based on an SCSTG Board which represents all relevant segments of tourism; also a pan-Scotland network of SCSTG members
- Continue an inclusive “Team Scotland” approach involving a strong public sector/private sector partnership
- Improve Scotland’s positioning in the global “hunting” tourism market as the destination of choice for stalking/shooting and fishing
- Increase the home (UK) market’s knowledge of the breadth of offer, both quarry and price range.
- Encourage a sustainable approach to country sports tourism by providing support to those projects that offer genuine added value at a regional and national level
- Highlight the land management/conservation/cultural benefits of adopting a sustainable approach to stalking, shooting and fishing in Scotland by capitalising on the concept of a harvestable surplus

8. Making it Happen: Actions 2016-2020

The action points outlined above provide the framework on which a range of initiatives will be developed. It is important to stress that the Actions are not an exhaustive or definitive list of project priorities but rather an indicative programme of activity that will be rolled out by the lead partners over the next 4 years. Support for new projects will be assessed on the basis of degree of strategic fit with the Key Objectives whilst the Actions themselves will be monitored quarterly and reviewed annually to ensure that the industry continues to have a bold and progressive programme of activity that aims to enhance country sports tourism as a major contributor to the Scottish economy.



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Seasonality of country sports

DEER

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Red (hind)		15 Feb									21 Oct	
Red (stag)							01 Jul			20 Oct		
Fallow (buck)				30 Apr				01 Aug				
Fallow (doe)		15 Feb									21 Oct	
Sika (hind)		15 Feb									21 Oct	
Sika (stag)							01 Jul			20 Oct		
Roe (buck)				01 Apr						20 Oct		
Roe (doe)			31 Mar								21 Oct	
Red/Sika hybrid (stag)		15 Feb									21 Oct	
Red/Sika hybrid (hind)							01 Jul			20 Oct		

Sunday & Christmas Day

Game

Unlike England, in Scotland there are no statutory restrictions on the killing of game on Sunday or Christmas Day but it is not customary to do so

Wildfowl

Wildfowl species may not be shot on Sunday or Christmas Day

Seasonality of country sports

GAME

	<i>Jan</i>	<i>Feb</i>	<i>Mar</i>	<i>Apr</i>	<i>May</i>	<i>Jun</i>	<i>Jul</i>	<i>Aug</i>	<i>Sep</i>	<i>Oct</i>	<i>Nov</i>	<i>Dec</i>
Pheasant	01 Feb									01 Oct		
Partridge	01 Feb								01 Sep			
Red grouse								12 Aug			10 Dec	
Ptarmigan								12 Aug			10 Dec	
Common snipe	31 Jan							12 Aug				
Wood pigeon	No closed season											
Woodcock	31 Jan								01 Sep			
Duck & goose (Inland)	31 Jan								01 Sep			
Duck & goose (below high water mark of ordinary spring tides)	20 Feb								01 Sep			
Coot/moorhen	31 Jan								01 Sep			
Golden plover	31 Jan								01 Sep			
Brown hare	31 Jan									01 Oct		
Mountain hare	28/29 Feb							01 Aug				
Rabbit	No closed season											



Seasonality of country sports

ANGLING

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Salmon*	11 Jan	Close season varies from river to river - consult an official body for local information									30 Nov	
Sea trout**	11 Jan	Close season varies from river to river - consult an official body for local information									30 Nov	
Brown trout			15 Mar	Local variations may exist					06 Oct			
Rainbow trout	No legal close season although some fisheries do not operate in the winter											
Grayling	No legal close season although some fisheries do not operate in the winter											
Arctic char			15 Mar	Local variations may exist					06 Oct			
Course fishing	No legal close season although some fisheries do not operate in the winter											
Sea fishing	No legal close season although some fisheries do not operate in the winter											

*Sundays: It is illegal to fish for salmon or sea trout on a Sunday. For other fishing, it is not illegal and most commercial stillwater fisheries operate on Sundays, although many river fisheries do not.

**Sundays: No Sunday fishing (subject to Wild Fisheries Review)



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