

Opportunities For Scotland's Rivers

Prepared for: Scottish Enterprise
Prepare by: Duncan Forbes
Presentation Date: August 2019

Contents

<u>Introduction</u>	<u>03</u>
<u>Project Insights</u>	<u>04</u>
<u>Salmon Board Considerations</u>	
Fixation on catch numbers	<u>06</u>
Licensing & data capture	<u>07</u>
Funding & marketing development	<u>08</u>
Online booking & data	<u>09</u>
<u>Communication & Collaboration</u>	
Industry engagement	<u>11</u>
Supporting enterprise	<u>12</u>
Celebrate success	<u>13</u>
<u>New Audiences</u>	
Target new markets	<u>15-17</u>
Improving the basics	<u>18</u>
Breakdown barriers	<u>19</u>
Put the customers first	<u>20</u>
<u>Branding & Marketing</u>	
Promote 'the experience'	<u>22-23</u>
Ownership of marketing	<u>24</u>
Visit Scotland campaign	<u>25</u>
Independent website & examples	<u>26-28</u>
<u>Ghillies & Guides</u>	
Ghillies	<u>30</u>
Guides & tourism	<u>31</u>
<u>Survey Suggestions</u>	
Survey feedback	<u>33</u>

Introduction

Our rivers have never been cleaner or better managed. Salmon anglers have never been more committed to conservation (evident in the wide adoption and support for catch and release). Despite these efforts, numbers of Atlantic salmon returning to our rivers continue to decline. Reduced catch numbers, changes in booking habits and an ageing demographic are all putting pressure on fishing related businesses and the wider rural economy.

While science, research and the management of predation must remain the focus, there is an opportunity to make improvements to an industry that forms a vital part of our culture and rural economy. The industry itself is made up of a vast array of stakeholders. Individual fisheries and businesses vary widely in terms of seasonality and character, impacting their appetite for change. Gathering consensus through industry wide engagement will be key to achieving many of the recommendations made in this document.

Opportunities:

- Challenge some of the traditional structures and ways of working
- Expanding the customer base beyond the current demographic
- Support improvement of riverbank infrastructure
- Focus on improving the end to end customer experience
- Continue to improve accessibility
- Support cross sector collaboration, innovation and enterprise
- Build a local and national development programme
- Develop a national & international marketing strategy

Barriers:

- Unable to shake off the “it’s always been that way” mentality
- Unable to gather industry wide support for marketing and development programmes
- Inability to raise funding to maintain longterm campaigns
- The industry is fragmented; some beats are very small and have short season businesses
- Limited capacity for strategic planning

Project Insights

- 1. Fisheries haven't had to do much:** They have relied on a 'deadman's shoes' business model. This model is now broken, the industry must work hard to provide better customer service (better facilities & greater flexibility) or customer experience (added value) *Related Pages:* [pg18-21](#)
- 2. Local businesses need support and facilitation to drive collaboration:** Collaboration between enterprising, local businesses is going to be key if the industry wants to develop, promote and adapt the sport to meet the many challenges ahead. *Related Pages:* [pg11-13](#)
- 3. The value of The Salmon might be inhibiting change:** *Related Pages:* [pg 6](#)
- 4. Fishing needs to attract new customers (with different expectations):** Fluctuating catch numbers, an oversupply of fishing and near perfect information online means keen anglers can book based on catch numbers alone. In addition, the traditional high value angler is also an ageing demographic. *Related Pages:* [pg15-17](#)
- 5. There is no marketing strategy & limited marketing support:** There is limited marketing of salmon fishing both nationally and internationally (the industry needs support). Many good news stories like 'catch and release' are not widely shared. There is an over reliance on booking platforms to promote the sport & individual fisheries. *Related Pages:* [pg9](#), [pg24 - pg28](#)
- 6. There's more to fishing than catching fish:** Most agree that promoting the experience of fishing in Scotland is key to generating new high value anglers. However very few beats understand or are equipped to deliver the end to end customer experience and packages required to fulfil this need. *Related Pages:* [pg22-23](#)
- 7. The Ghillie is the face of Scottish salmon fishing:** The industry has high expectations of what Ghillies should be able to achieve (managing directors of beats). Most are under paid, unvalued and in many cases unsuitable to meet the expectations meted upon them. *Related Pages:* [pg30](#)
- 8. Businesses who focus on providing an experience are winning:** Businesses who focus on the customer experience beyond just catching salmon seem to be bucking the trend and maintaining customers. *Related Pages:* [pg31](#)
- 9. The River Boards / Industry should consider making some fundamental changes:** *Related Pages:* [pg6](#), [pg7](#), [pg8](#), [pg9](#)

Salmon Board Considerations

Fixation on Catch Numbers

The over dependence on salmon catches as a figure that influences a beats popularity and it's market value means that Proprietors and Ghillies are constantly under pressure to maintain catch numbers. This focus may be inhibiting diversification of river usage, pursuit of alternative fishing experiences, entrepreneurship and an appetite to widen the target audience. Furthermore the direct link between catch numbers and the Salmon Board's income puts budgets under pressure, when funding is needed most.

- **Proprietors:** The value of individual beats is based in large part on the five year average salmon catches. Many Proprietors have seen their beats half in value. Is the requirement to maintain catch levels stopping Proprietors from considering alternative fishing experiences?
- **The River Boards** income is related to salmon catches: Meaning their budgets are challenged / put under pressure at a time when they could make the most impact, especially if funding could be diverted to marketing and development support.
- **Ghillies:** Are under pressure to maintain catch numbers. This is a disincentive to have anyone other than proficient anglers fishing during peak periods, or for them to promote other forms of species fishing (brown trout & grayling) to customers.



Licensing and Data Capture

There is currently no rod licensing scheme in Scotland. Anglers must receive written permission from landowners or associations.

Consideration:

The introduction of a separate rod license would supply the industry with valuable data on anglers and their numbers. Accurate occupancy levels are key to measuring the economic impact of each river system.

Licensing would also provide a valuable database to communicate key messages around conservation and marketing.

Licensing may also provide an independent funding source for marketing & conservation efforts in Scotland.



Funding Marketing & Development

Many of the suggestions within this report relate to marketing, PR and development support. For this to be a longterm success the industry needs to be able to raise additional funding to support longterm marketing campaigns & development programmes.

Recommendation:

- Change in the function / remit of The River Boards - Allowing them to channel funds towards marketing and development.
- A Marketing & Development fee raised through a licensing scheme or through a commission from bookings.



Online Booking & Data

Traditionally fishing was booked directly through the Proprietors, Ghillie or Agents. Since the launch of reliable online booking platforms there has been a significant increase in the number of fishing days booked online. The ability to purchase fishing, vouchers and packages online through an efficient and reliable platform has significantly improved customer experience and reduced administration for Proprietors.

However, online booking has changed the relationship between Angler and Proprietor, reducing their ability to capture valuable data and maintain communication with their customer base.

While booking platforms provide a valuable service, they should not be relied upon to represent the marketing needs of individual rivers or the wider Scottish game fishing industry.

Considerations:

- If the industry had a marketing website how would online bookings be managed?
- How could online booking be improved?
- Does the current model work for both Anglers and Proprietors (not trying to go direct)?
- Could the current pricing structure be improved e.g. dynamic pricing (Airlines & Hotels)
- Look at unrelated industries and associations, how do they manage online bookings (Airbnb, Trip Advisor)?



Communication and Collaboration

Industry Engagement

The industry is made up of a vast array of stakeholders. Fisheries vary widely in terms of seasonality and character. This impacts their appetite for change and makes it extremely challenging to seek industry-wide consensus. This lack of clarity and direction is a barrier to many of the recommendations in this document and will therefore limit improvements to customer experience, supporting innovation and entrepreneurship at a local level.

Recommendations:

- Local Development / Marketing Officer supporting the needs of each region in Scotland.
- National Marketing and PR Coordinator responsible for promoting fishing in Scotland.
- The River Dee currently has a development officer in place. We could use the Dee as a case study.

Development Officers would be responsible for the following:

- Stakeholder engagement.
- Development of key audiences.
- Supporting customer experience.
- Representing marketing and PR needs locally.
- Helping to shape a regional and national marketing strategy.



Support Local Enterprise

While conducting focus groups it became apparent that cross-industry workshops rarely take place. We noted that the most positive business owners seemed to be those who focused on customer experience and work closely with associated businesses to offer customers more than just salmon fishing.

Recommendation:

Help support local businesses through facilitated 'Planning to Succeed' type groups. These groups would bring enterprising individuals together to help them grow their businesses while also supporting cross-industry collaboration.



Celebrate Success

Many of the recommendations within this document require new markets and cultural change. This level of change will take many years to achieve, however by recognising excellence and providing case studies of businesses who are succeeding despite low catch conditions we can help other businesses adapt.

Recommendation:

Run a pilot study, providing the industry with positive case studies:

- Examples of successful collaboration between beats & accommodation providers.
- Fisheries or private businesses providing an end to end fishing experience.
- Ghillies who provide a high level of customer service.
- Fisheries that specialise in other forms of fishing e.g. Grayling & brown trout.
- Fisheries that specialise in beginners and coaching.



Expanding the Audience

Target New Markets

Until recently many beats have enjoyed steady income based on high value fishing parties booking week long lets, a year in advance, often with accommodation purchased in addition. In most cases this repeat booking model is broken & unlikely to return. The traditional angler is now making less or shorter bookings and prices are falling. This demographic is also ageing, compounding the challenges faced by the industry.

The traditional fishing party (highlighted above) and the keen local angler have high expectations of catching fish. They now enjoy perfect catch information which allows them to make informed, last minute decision as to where they will fish. This group are unlikely to be swayed by marketing or promotion, they can therefore be discounted from any future marketing effort.

If we want to expand the target audience for fishing we need to seek out new customers with lower expectations and provide them with a better end to end customer experience.

Recommendation:

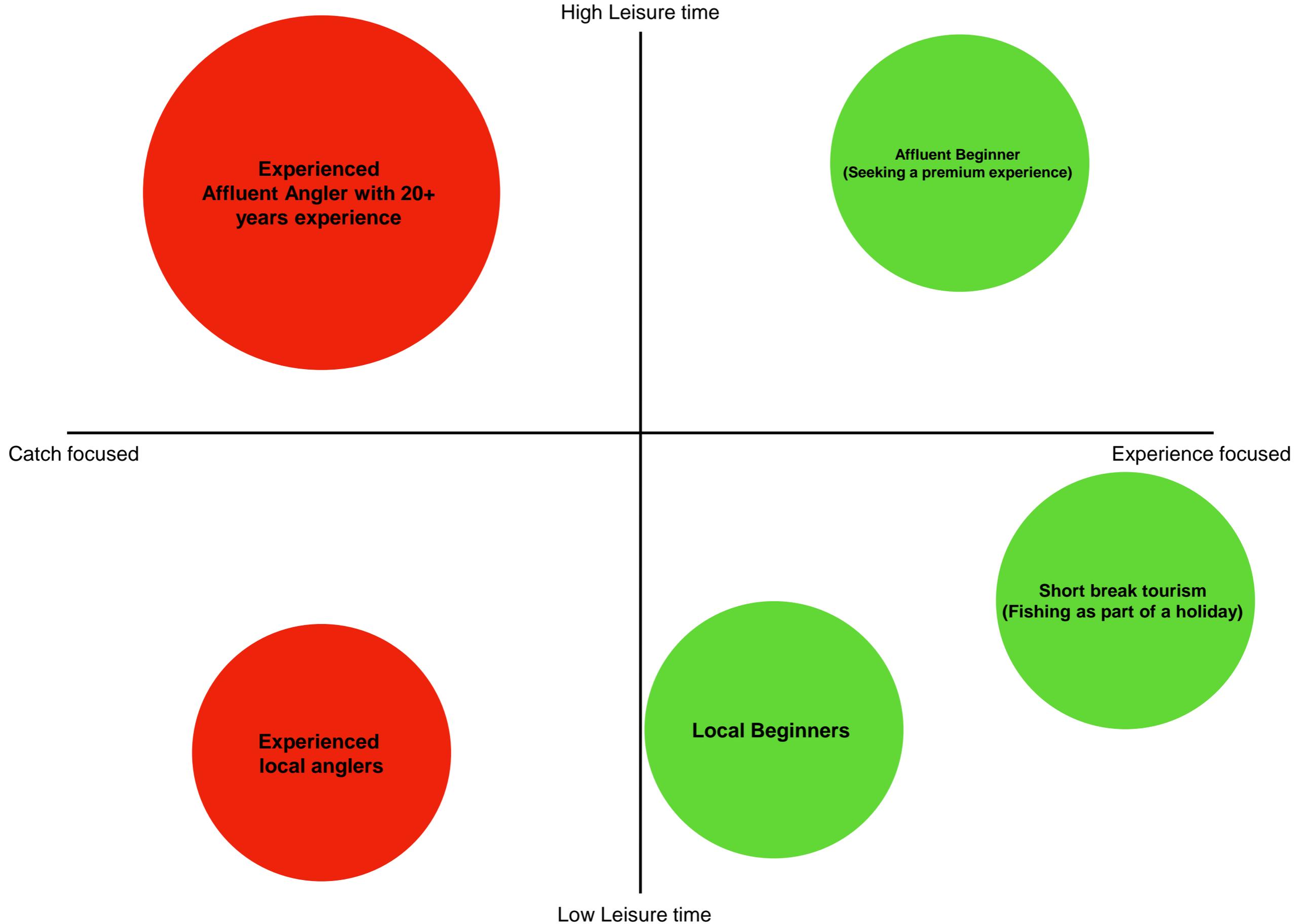
Conduct market research into potential new markets and fishing tourism and develop a cost effective marketing campaign (social media) to target these individuals.

- Marketing the aspirational experience to affluent beginners.
- Promote salmon fishing as part of a holiday experience.
- Support local development to encourage local beginners into the sport.

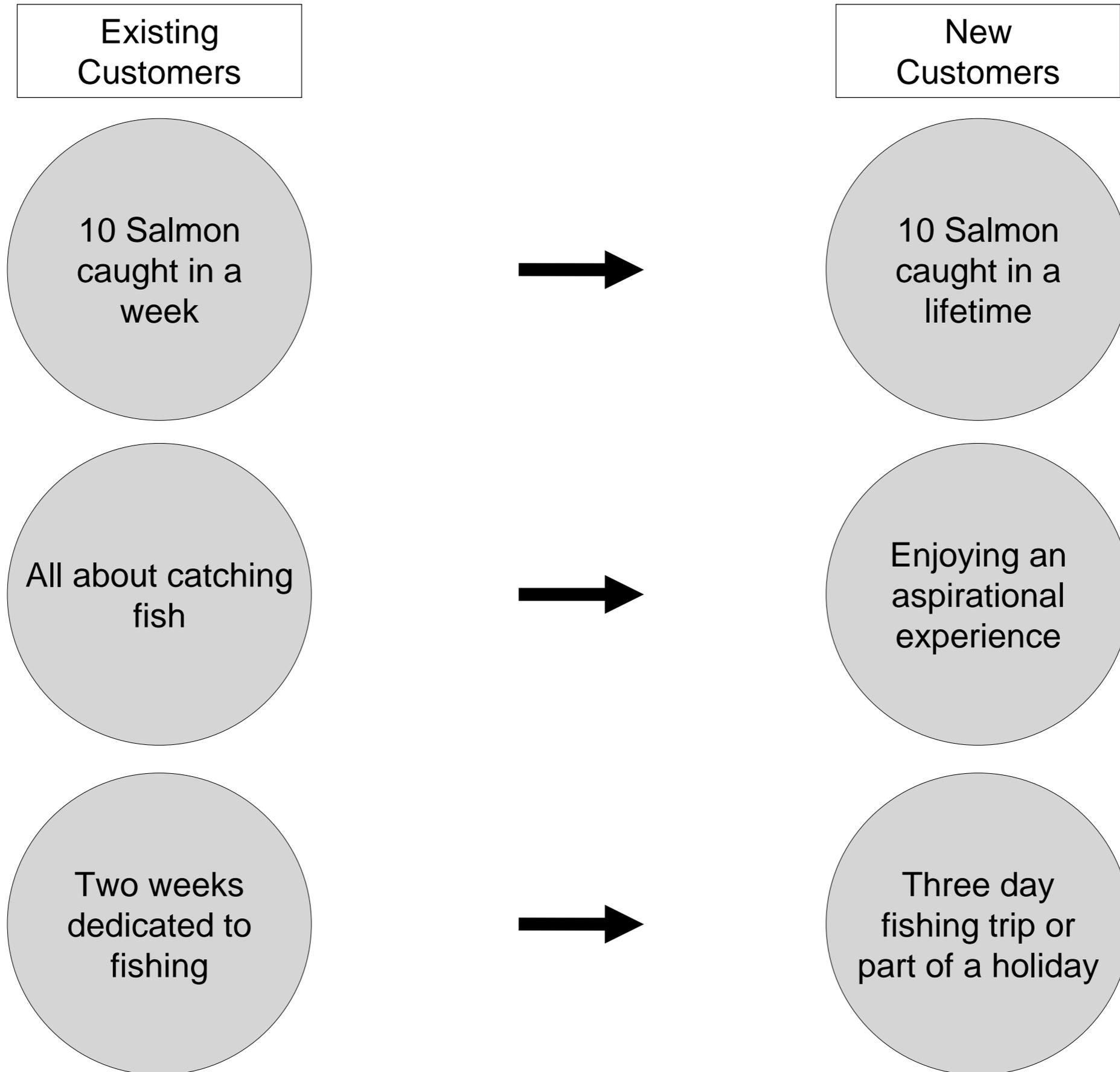
“We need to move expectations from catching 10 salmon in a week to 10 salmon in a lifetime”

Workshop Attendee

Who Are Your Customers?



Shifting Expectations



Improve the Basics

Traditionally the industry has benefited from high demand and low availability of fishing. This meant that very little in the way of infrastructure was required. It is also often challenging and expensive to install basic essentials to the river bank.

Recommendation:

Offer support or rates relief on essential fishing infrastructure:

- Toilets.
- Hot and cold running water.
- Electricity.
- Fishing huts.
- Access to equipment - Quality waders, rods, reels etc.



Breaking Down Barriers

Salmon fishing remains an intimidating sport for beginners to enter. While the industry has worked hard to shake off its perceived elitist reputation, work still needs to be done to make it easier for newcomers entering the sport.

Recommendations:

- A dedicated website or section of a website helping beginners enter the sport.
- Fisheries ranked according to suitability for beginners and families.
- Easy access to equipment hire (especially good quality waders).
- More women and family days.
- Greater coordination with private guides & accommodation providers.
- Expand successful local examples like Aberdeenshire Fly Fish 50



Put the Customer First

Historically, tradition has been put before customer experience. Most anglers would appreciate better facilities, more flexibility and a sense that the Proprietor and Ghillie was putting their needs first. As the market changes, customers will demand enhanced services and greater flexibility.

Recommendations:

- Easy online & offline booking platform.
- Provide quality of facilities i.e. huts, toilets, heating, wifi etc.
- Offer greater flexibility on length of booking and fishing hours.
 - Fishing through lunch.
 - Fishing early morning and evening.
 - **Sunday Fishing.**
- Offer flexibility & clarity on rules - fly, spinning etc.
- Provide a high level of customer service.
- Refund the customer if conditions don't allow access to the river (industry insurance).
- Access to equipment hire, support and tuition.
- Don't tie accommodation to fishing.

**CUSTOMER
FIRST APPROACH**

Branding and Marketing

Promote the Experience not The Salmon

Fisheries have relied on the availability of Salmon, an iconic brand in it's own right. The Salmon has become the singular focus for anglers and the industry. As numbers of this wild asset have declined, so too has the perceived brand value of individual beats and fisheries.

Recommendation:

Each fishery should consider their target market and work hard to develop their own brand, based on their attributes and available species. As an industry we need to work hard to promote the experience of fishing in Scotland, not just The Salmon.

Experience?:

- | | |
|---|--|
| <ul style="list-style-type: none">• Adventure and excitement.• History and tradition.• Being immersed in nature.• Emotional wellbeing.• Being surrounded by natural beauty. | <ul style="list-style-type: none">• Value all forms of species fishing• Enjoying great food, drink and conversation.• Family and friendship.• Learning an art (Casting).• Maybe catching a fish. |
|---|--|





Fun, friends & family



Learning something new



Great food and hospitality

“There’s more to fishing than catching fish”

Focus Group Attendee

Being close to nature



Luxury and indulgence



Unique accommodation



Ownership of Marketing

The industry lacks a national marketing strategy or independent platform to communicate with potential customers. While some rivers and individual fisheries have been successful at promoting themselves, wider engagement with the public is largely in the hands of private businesses.

Recommendations:

- National and regional marketing strategy.
- National or regional marketing officers.
- Website that provides users with a single source of information and booking.
- Provide better information to Visit Scotland - (See skiing vs fishing on visitScotland).
- Greater support from Visit Scotland with a sustained, targeted marketing campaign.
- National and regional support.
- Longterm commitment to marketing support.



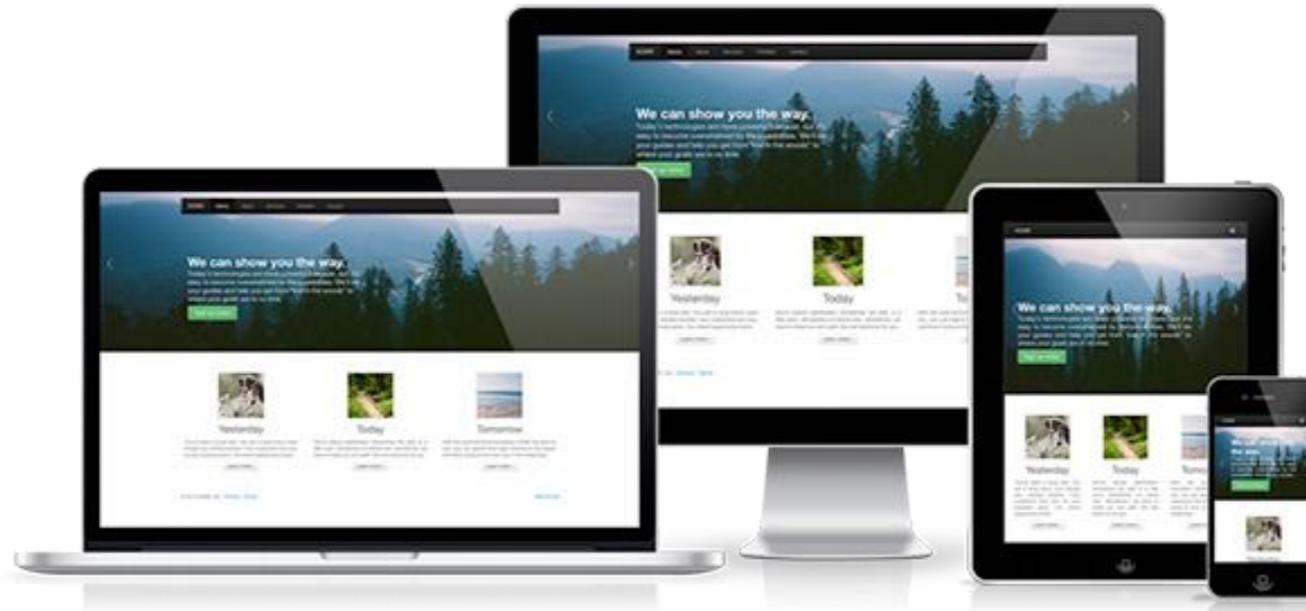
Visit Scotland Campaign

Fishing receives very little marketing support. A long term commitment to include fishing as part of the Scotland experience would give the industry a significant boost. **2020 is the 'year of water'**, an ideal opportunity to promote Scotland as a fishing destination for all abilities.

- Visit Scotland Campaign.
- Independent representation of the industry within the Visit Scotland website (currently links to Fishpal).
- Closer collaboration with regional offices.
- International social media campaign - targeting anglers with direct flights to Scotland.
- Directing users to an industry led independent website.



Independent Website



Recommendation:

A dedicated website that helps market fishing in Scotland and provides customers with a single source to browse, learn and book.

The website should include:

- List and interactive maps showing fisheries (with a customer friendly ranking), accommodation providers, private guides and associated businesses.
- Provide ranking on beginner friendliness or challenging fishing.
- History and information about rivers and fisheries.
- Use Fishpal as a booking engine or allow users to book directly.
- Directory and rating system showcasing businesses associated with fishing.
 - Accommodation providers.
 - Equipment hire.
 - Private guides.
 - Food & drink.
 - History and heritage.
 - Activities and adventure.

Example: North Coast 500 (Link to Website)

North Coast 500 website provides users with an engaging and interactive guide to this newly developed route around the highlands. The website and mobile app provide Interactive maps, themed itineraries and an extensive directory showcasing local businesses and culturally important sites.

The image displays two screenshots of the North Coast 500 website. The left screenshot shows the homepage with a map of the North Coast 500 route, a search bar, and a section titled "Plan your trip around one of Scotland's most beautiful coastal routes". Below this is a "Things to do" section with a "Download The App Now" button. The right screenshot shows a search interface with a "VIEW AS A LIST" button, a search bar, and a map of the North Coast 500 route with numerous green location markers.

Home Interactive Map What To See & Do Itineraries Blog Events Contact FAQs

Become A Member | Log In

Plan your trip around one of Scotland's most beautiful coastal routes

North Coast 500: More than 500 miles of the best the North Highlands has to offer. The route way runs to and from Inverness, venturing round the capital of the Highlands, up the West Coast and back via the rugged north coast.

INTERACTIVE MAP

Things to do

The North Coast 500 is a haven of adventure, with hundreds of things to see and do, whether it be spotting dolphins, climbing mountains, tasting local delicacies or relaxing on the beach - there is something for everyone on the North Coast 500.

Download The App Now

Available for Apple & Android Devices. Search 'North Coast 500'.

VIEW AS A LIST

Area: All

What are you looking for?: Food and Drink

Advanced options: Restaurant

SEARCH

Website: www.northcoast500.com

Example: 7 Stanes

The 7 Stanes brand was developed as an umbrella concept for the seven individual mountain biking centres around the south of Scotland. By developing a single brand all of their promotion can be channeled through a single website / social media page.

They also rank various centres based on difficulty.



Website: www.facebook.com/7stanesMountainBiking

Ghillies & Guides

Ghillies

The Ghillie is the ambassador for Salmon fishing in Scotland. The expectations on them are huge in terms of maintaining catch numbers for Proprietors, and delivering individualised customer experiences. They are under paid, under resourced and often unable to provide the level of customer service required.

Recommendation:

- A long term strategy for developing the next generation of Ghillies.
- Funding for training to help professionalise the role.
- Customer service certification.
- Increase in apprenticeships.
- Reduce the reliance on tips as 1/3 of income.



NOT EVERY KID HAD "ASTRONAUT"
ON HIS LIST OF DREAM JOBS.

Guides & Tourism

Good quality professional guides and businesses dedicated to angling tourism report positive growth. They are providing the flexible, end to end fishing experience that high value tourists require. They are focused on customer needs and are flexible regarding species and location. Collaboration with good quality professional guides should be something Proprietors consider.

What are they doing right?

- Offering an end to end fishing experience regardless of ability.
- Tailoring trips to meet and manage customers needs.
- Selecting fisheries based on customer experience and the service level of Ghillies.
- Open to all forms of species fishing.
- Provide good quality equipment.
- Add value through accommodation and food & drink offering.



Survey Suggestions

[Respondent Results]

What changes would you make to attract more anglers to the river?

- *Create a better all round fishing experience end to end.*
- *Create a more all round experience (ie tied in with other activities - golf/clay pigeons - or "tourist" attractions.*
- *Visitors are now looking at the time spent in our area as a holiday with fishing rather than a fishing holiday.*
- *Further investment into more family friendly accommodation and activities.*
- *Do more social media promoting the rivers.*
- *Improved PR and Communication.*
- *It has to become more about the experience and not necessarily catching a salmon.*
- *Taster days - fishing lessons on a trout pond to give the public the thrill of hooking a fish.*
- *Encourage collaboration amongst proprietors.*
- *Improve facilities and promote what other opportunities there are.*
- *Make the experience more of a day out*
- *Market our business worldwide via our website, increased digital and print media marketing spend.*
- *Better TV coverage on River and area surrounding.*
- *Government backed huge advertising and marketing campaign for our business and others like Visit Scotland to show what we have on offer for at least 6 months.*
- *Promote friends of river and give them some incentive to become friend of river.*
- *Do not put barriers in the way! The proposed ban on spinning would be a disaster!*
- *Appeal to a broader audience who are perhaps not such hardcore fishers.*
- *Improve the amenity, make fishing more accessible to new participants, package the 'Tweed Experience' around the tweed history and tradition and improve customer care and facilities.*
- *Supporting smaller business allowing them to thrive. Reducing Business rates and rent would help and attract new business to the area.*
- *It's all about promoting what's on offer and we need a huge help in making this happen by promoting and advertising all that visitors can do.*
- *Changing the mind set from 'catching' to 'fishing'.*
- *Better communication with the prospect market, a more unified feel to the Salmon Fishing outlook better marketing of the beat, more events.*
- *More fishing and accommodation packages and special deals.*
- *Incentives for early booking, reduce rates and enhance the overall experience so it isn't just about catching a fish.*
- *Make it more accessible to a new and wider audience, demystify the booking process and terminology, offer more packages for beginners who want to give it a go supplying all the kit and a guide, market fly fishing to reach a wider and younger audience to emphasise it isn't an elitist sport, enhance the overall experience and promote the health benefits.*
- *Better facilities on the river.*