Country Sports Tourism in Scotland : Delivering Sustainable Growth : 2015-2020 : A Consultative Draft Strategy

Vision

'By 2020 Scotland will be a Country Sport(s) tourism destination of first choice, known for a sustainable, high quality, uniquely Scottish experience delivered by skilled, knowledgeable and customer focussed people.'

Ministerial Foreword : *tbc ....nearer the time, it would be good to get Fergus Ewing MSP or other appropriate individual to pen a few introductory remarks highlighting the value of the country sports sector to the Scottish economy in general & rural tourism in particular building on his continued supportive comments*

Contents *tbc..........once the full document has been prepared & agreed*

Executive Summary *tbc........ once the full document has been prepared & agreed*

1. **Introduction**

Scotland is widely recognised as the birthplace of many of the world's premier country sports. According to a report compiled by TNS in 2004, country sports was estimated to be worth in the region of £200m per year 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 Ltd*, revealed that overnight visitors made 270,000 country sports trips comprising 910,000 visitor nights with an estimated tourism expenditure in 2013 of £155m.

Both sets of baseline figures underline the significance of the country sports industry to rural Scotland & 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 & 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. The organisations involved are: Association of Deer Management Groups, Association of Salmon Fisheries Boards, British Association for Shooting & Conservation, Scottish Gamekeepers' Association, Scottish Land & Estates, Scottish Enterprise, Scottish Natural Heritage, Highlands & Islands Enterprise and Visit Scotland. (refer www.countrysportscotland.com)

Since its inception, the SCSTG has evolved into a well-established & respected representative body that has pioneered a number of project initiatives designed to realise business development opportunities within the sector at large. Significantly, it is one of the few tourism groups who are 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 in the short, medium & longer term. 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. Time is now ripe for the SCSTG in consultation with the industry, policy makers & other stakeholders to prepare a new dedicated strategy document for country sports.

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

Not only will this help raise the profile of the industry itself amongst Scottish Government minsters, local authorities & other key opinion formers, it will also help provide focus and sense of direction for individual businesses to collaborate much more effectively than in the past leading to a more coherent & less fragmented customer offer. Publication of a strategic framework document that articulates a future vision of the Country Sports Tourism sector, will help identify its growth potential & how it proposes to realise the scale of opportunity via a transparent Action Plan for the short, medium & longer term. Equally important, the existence of such an evidence based strategic document is a vital prerequisite for future bids/applications to funding sources such as VS Growth Fund, SRDP LEADER Programme, EU Structural Funds, etc.

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 Tourism 2020 document
- awareness of the need to adopt a more proactive industry-led approach in meeting the needs of the country sports sector
- Increasing overseas competition & 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 & data for the benefit of the SCSTG partners & individual businesses alike
- the expected growth prospects of the country sports tourism sector to 2020; &
- Challenges that could arise from the land reform recommendations.

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 & Estates, the Association of Deer Management Groups, Salmon & Trout Association, Scottish Natural Heritage, Visit Scotland & 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). Tourism 2020 vision to increase the value of tourism to the Scottish economy.

2. The Present Position

2.1 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. 40% of Scotland is upland, home to deer and large numbers of game birds, there are many salmon rivers and freshwater lochs. Overwintering, migratory waterfowl and waders number in the millions. Scotland is recognised as a country sports venue offering a unique blend of high quality, professionally managed stalking, shooting and fishing experiences set against a stunning natural and cultural backdrop.

2.2 As can be seen in the tables below the range of quarry species and their open seasons is vast. Participation in country sports in Scotland is possible 365 days of the year.

Stalking

Quarry Species	**Season**
Red Deer Stags	**Jul 1 to Oct 20**
Red Deer Hinds	**Oct 21 to Feb 15**
Fallow bucks	**Aug 1 to April 30**
Fallow does	**Oct 21 to Feb 15**
Sika stags	**Jul 1 to Oct 20**
Sika hinds	**Oct 21 to Feb 15**
Roe Bucks	**Apr 1 to Oct 20**
Roe does	**Oct 21 to Feb 15**

Shooting

Quarry Species	**Season**
Red Grouse	**Aug 12 to Dec 10**
Partridge	**Sep 1 to Feb 1**
Pheasant	**Oct 1 to Feb 1**
Woodcock	**Sep 1 to Jan 31**
Snipe	**Aug 12 to Jan 31**
Duck and Goose (inland)	**Sep 1 to Jan 31**
Duck and Goose (below HWM of ordinary spring tides)	**Sep 1 to Feb 20**

Fishing

Quarry Species	Season
Salmon	Jan 11 to Nov 30 Somewhere in Scotland (Currently No Sunday Fishing subject to Wild Fisheries Review)
Sea Trout	Jan 11 to Nov 30 Somewhere in Scotland (Currently No Sunday Fishing subject to Wild Fisheries Review)
Brown Trout	Mar 15 to Oct 6 (local variations may exist)
Grayling	No Close Season
Artic Char	Mar 15 to Oct 6 (Local variations may exist)
Rainbow Trout	No close season but generally aligns with Brown Trout season
Coarse Fish	No Close Season

Value of Country Sports in Scotland

Value of Shooting and Stalking (GVA)	£200m
Freshwater Fishing (2004) (Not GVA)	£113m
TOTAL	£313m

The value of Country Sports Tourism has been quantified as shown below. A 'Country Sports Tourist' is someone visiting to participate in country sports and spending at least one night in the country.

Volume and Value of Country Sports Trips

Country Sports Trips by Tourists	270,000
Visitor Nights Resulting from these Trips	910,000
Value All Country Sports Tourism	£155m

Country Sports Tourist Originating Locality

England	60%
Scotland	30%
Rest of World (Majority N America and N Europe)	10%

Demographic of the Current Country Sports Tourist

Shooting/ Stalking	
Male	96%
Female	4%

Aged > 40 years	**84%**
Freshwater Game Fishing	
Male	**98%**
Female	**2%**
Aged > 45 years	**91%**

<u>The Following Conservation Benefits Have Been Identified by Country Sports Providers</u>

Fisheries Respondents	
Maintenance of River banks, Lochs and Streams	**86%**
Links with Conservation Groups	**62%**

Shooting and Stalking Provider Respondents	
Contain land with conservation designation	**54%**
Member of Biodiversity Advisory Group	**45%**
Undertook Bird Surveys for RSPB and SNH	**45%**

The views of Country Sports participants offered some insights into the added benefits they associated with participation in Country Sports. The Shooting/Stalking and Fishing respondents views are based on answers to slightly different questions.

Shooting/Stalking Participants Views on Added Benefits	
Attractive Environments	**97%**
Shooting Contributes to this Attractiveness	**92%**
Healthy Environments	**98%**
Contributes to Personal Well Being	**99%**
Contributes to Conservation	**94%**
Contributes to Local Social Fabric	**93%**
Contributes to Local Employment/Skills	**92%**

Fishing Participants Views on Fishing in Scotland – Scoring Very Good, Good and Average for	
Ghillies	**98%**
Scenery/Environment	**99%**
Fresh Air	**100%**
Scoring Average, Poor or Very Poor for	
Fish Stocks	**77%**

Fishing Participants Views on Returning to Fish in Scotland	
Very Likely or Quite Likely	**96%**

Fishing Participants Views on Taking a General Holiday in Scotland	
Very Likely or Quite Likely	**72%**

2.3 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 if a reduction in Air Transport Duty related to inbound international flights is introduced. Aligning knowledge of new routes as airlines introduce them may 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.

There is an understandable reluctance on the part of Estates to welcome ‘novice’ guns.

Both these issues may be creating a barrier to increased participation in Country Sports.

Land Reform Legislation may have an effect on country sports provision.

The rural location of the majority of country sports activities does have implications for access for those without their own transport.

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. Disabled access to shooting is also available, although 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
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 rural areas which impact on country sports businesses. Lack of mobile coverage, slow access speeds and poor broadband connectivity have implications for growing the country sport market. Some Country Sports related businesses do not have an online presence. The SCSTG Web Portal does offer such a presence to businesses. Unfortunately, it does not represent the ‘whole of the market’

2.4 Sustainability

From a conservation perspective, country sports have a profoundly positive impact on the natural environments where they are enjoyed and play a major role in helping to preserve the natural and cultural heritage of their area. Scotland covers 7.8 million hectares and, of this, some 4.4 million hectares are influenced by shooting and 0.7 million hectares directly managed for shooting.

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. Also 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.

3. Issues and Opportunities

3.1 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	**Weaknesses**
• Heritage / authentic / long tradition of country sports in Scotland • Exclusivity of product offer in unspoilt, spectacular & dramatic “wild” landscapes • Generally good transport accessibility for domestic & overseas visitors alike • Extensive market intelligence & baseline research • Reputation of Scotland as a quality destination for stalking/shooting & fishing • Industry knowledge & unique country sports experiences eg ghillies/guides/garrons • fit for purpose SCSTG with proven track record & high quality website portal www.countrysportscotland.com • stalking/shooting & fishing tends to be more recession proof than other tourism activities	• 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 re how to participate in the country sports sector • Industry apathy in some quarters • Ageing visitor profile • Negative perceptions of the weather • Skills? Quality? Recruitment? • Participants predominantly male
Opportunities	**Threats**
• Policy recognition that country sports sector is now a key all year around tourism asset especially during the “shoulder “ months • Corporate and Incentives market (possibly via B2B routes) • Recent Scottish Government support for country sports & 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 eg golf, wildlife watching , camera safaris sightseeing/walking, • Scope to introduce & encourage more country sports familiarisation trips/media exposure • Scope for so called “lesser” species	• Anti-hunting lobby and broader negative perceptions • Adverse publicity eg 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 eg 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, eg accommodation providers

such as roe doe 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 eg McNab type Packages, Scottish Wild Brown Trout Challenge, • Develop International market to target demand from Scandinavia & USA • Potential new community/business opportunities as a result of the emergent Land Reform/Wild Fisheries Review legislation	• reluctance to gather & use market intelligence to inform future product development & marketing efforts • reduction/withdrawal of inbound flights from key markets • Industry uncertainty surrounding the emergent Land Reform/Wild Fisheries Review legislation • Climate Change

3.2 Future Growth Opportunities

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

Stalking

- **Stag stalking** (red and sika and also fallow bucks) – there is limited spare capacity but some value adding opportunities, eg three species holidays, or stalking with ponies. There is also a potentially larger market for woodland stags which are generally bigger. Wild stalking is another possible niche for development **Action: ADMG;SCSTG website;**
- **Hind stalking** – a growth area with some spare capacity and can also be packaged with other types of shooting and accommodation. **Action ADMG/SCSTG website**.
- **Roe deer** - some capacity for expansion, both bucks and does. Mostly done by vocational hunters using ground over which they have taken stalking rights/a lease. However, more estates are now looking to let roe buck stalking on a 'per buck' basis due to increased demand .**Action LDNS/SACS/BASC/**
- McNab and other deer inclusive variants - potential for limited innovation, new combinations etc; a very niche but potentially higher value product and most popular with an international party that are willing to pay a premium.
- **Entry level** stalking but applies to all sports; work to generate and create interest for new participants**. Action All/SCSTG to market**.
- **Wildlife Camera safaris** - growth area with considerable volume potential. Can be offered outwith sporting seasons. Different target market with educational spin off. **ADMG/Wild Scotland**
- Opportunity for public sector landowners to open up new stalking to the wider visitor market.

Fishing:

- **Guiding**. Definitely the growth area. Action; get Ian Gordon/ Jock Monteith etc on board. **SGA/S&TA**
- **Mixed species**. Not convinced unless with guide
- **Short lets**. Market already demanding this, and Fishpal supplying method
- **Sea Angling**. Unless we get buy-in from SFSA, which represents sea anglers, and individual charter boat owners, then I think we will be wasting our time. I speak from some experience with the Angus Angling Initiative, and ATDG.Action; talk to SFSA?
- **Char/Brown Trout** Currently perceived as Low value but there is unrealised potential
- **Other Opportunities** – worth checking out the Wild Fisheries Review recommendations under chapter 10 'Opportunities for All' . The link to the summary recommendations (pp 7 and 8) is http://www.scotland.gov.uk/Resource/0046/00460196.pdf so I won't list them all here but there are some specific 'product' opportunities highlighted in Recommendation 52 – VisitScotland should be invited to participate in the establishment and ongoing management of an Angling for All Programme for Scotland, with a particular emphasis on exploring ways in which casual angling and low impact salmon netting activities might be integrated into the wider activity holiday product. Action; SCSTG (through ADMG/S&TA and public agency contacts) to engage with processes for taking forward these recommendations including any lead or new umbrella body that emerges.

Shooting

- **Reared game driven shooting** - mostly now over supplied and market has become very discriminating. Opportunities to add value by packaging, eg moving from shoot to shoot with central accommodation base. There is still a demand for walked-up or rough shooting – is the industry reluctant to provide this preferring the driven shoot model (more profitable). **Action all relevant bodies, SCSTG to market.**
- **Grouse** – possibility of oversupply if current levels of breeding success become the norm through the use of current management techniques. Potential loss of exclusivity which would be likely to reduce perceived and monetary values. Focus on diversifying grouse products, eg pointers, walk up, falconry. Probable capacity to grow the market and promote more widely, eg USA. **Action SCSTG**
- **Other Wild Quarry** - pigeons, rabbits, mixed etc - potential for more development and better packaging. Strong European and Scandinavian demand. However low unit value so needs high numbers of participants to be viable. Deserves further consideration in marketing strategy. **Action relevant organisations plus SCSTG**.
- **Duck flighting** - part of the mixed packages.
- **Wildfowling** - specialist and not very general sporting tourist friendly but can be combined with mixed shooting. However, inland goose shooting very tourist friendly and was highly popular with Italian market until Italian finances crashed. **Action BASC.**
- **Falconry** - different market and has its place in being low impact in terms of game taken, so works well if done in conjunction with a driven shoot or in poor wild game years. Also relevant for pest species.
- **Clay pigeon shooting** - not "country sports" but has a value in sporting packages, eg first day to get the eye in. Key to being introduced to shooting and learning how to handle a gun
- **Simulated Game Shooting**
- **Grouse marketing** can be improved.

Generic

- **Corporate sporting packages -** rather overdone and discredited by excessive bags. Needs a much more politically sensitive approach and more subtle marketing focussing on quality not quantity. The big shoots need to be targeted to have this discussion. A focus on the positive aspects of the food supply chain for the shot birds may assist with this.
- **Disabled Market/All Abilities** - realistically difficult unless very set piece. Works fine with clay pigeon shooting.
- **Cruise market** - Research required to confirm that cruisers and shooters overlap much but worth investigating.
- **Food and drink** – potential to strengthen between shooting and game cooking. "One for the pot" ethos is appealing to many. Venison undersupplied, feathered game over supplied but a good objective to eat more of the game we harvest. Plenty of celebrity chef endorsements have helped with this in the past, although supermarkets are now supplying a lot of game all year round. Concept of harvestable surplus
- **Local Authorities** – many not be aware of this aspect of tourism which is widely available in their areas and could help with destination marketing, DMOs etc. **Action SCSTG could play education role**
- **Familiarisation trips -** as with golf and other tourism segments there is potential for introductory country sports packages including.
- **Make connection between country sports and conservation much better known**

4 Vision for the Industry

This should be a short impactful statement such as –

'By 2020 Scotland will be a Country Sport(s) tourism destination of first choice known for a sustainable, high quality, uniquely Scottish experience delivered by skilled, knowledgeable and customer focussed people.'

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

4.1 **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 top 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. And all of this falls within a rich cultural and historic heritage.

b : Encourage a customer focussed approach by gathering quality visitor data, sharing market intelligence & best practice from other successful destinations as well as regularly sharing research findings with industry in order to promote evidence-based decision making. And the 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 & fishing makes to the tourism economy. Information gathering is pivotal for marketing and developing the country sports tourism product, yet few sports & accommodation providers know who their markets are, where they come from, how often they visit, etc. The lack of availability/sharing & use of market intelligence will therefore be tackled as an integral part of the planned TIS business workshops, based on the findings from the recently launched PACEC Study & other market intelligence reports.

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 fully demonstrate its credentials to promote the country sports sector in Scotland supported by organisations representing all the main country sports segments.

d : Increase visitor numbers, visitor spend and repeat visits by 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 & 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 & expectations in more detail will enable the industry to better develop the country sports product offer to ensure that Scotland outperforms its global competitors.

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 visit experience, eg accommodation providers, transport, specialist services such as sporting shops, gunsmiths, 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.

How will the partners tackle these key objectives in practice?

5 Guiding Principles

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

- foster a coordinated and industry-owned approach based on a 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 & fishing
- improve 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 & fishing in Scotland by capitalising on the concept of a harvestable surplus

6 Making it Happen : An Action Plan 2015- 2018

Market research confirms that Scotland faces tough and growing competition in the international country sports tourism market. There is pan-industry recognition that proactive initiatives need to be implemented in all areas of product and business development, customer service, marketing, research, skills training and innovation if the challenges are to be met.

An initial 3 year (5 yr to 2020?) Action Plan has therefore been drawn up which identifies a range of initiatives that will be pivotal in helping to meet the above challenges. It is important to stress that the Action Plan is 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 3 years. Support for new projects will be assessed on the basis of degree of strategic fit with the Key Objectives whilst the Action Plan itself will be monitored quarterly & 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.

How best can the SCSTG assist? Perhaps adopting a 'geographic' approach, providing support in a similar way to the model developed in Ayrshire and Arran, with collaboration between Local Authority Tourism Team, Scottish Land and Estates, Sporting Providers and local tourism businesses.

7 Conclusions

In conclusion, the time is now ripe for a much more evidence based, strategic approach towards meeting the needs of the country sports tourism sector in Scotland. Over the coming months, this draft strategy will be subjected to an extensive consultation exercise with a range of key industry partners via a series of TIS business webinars designed to galvanise further sectoral collaboration By adopting a more proactive industry-led approach, the Strategy – once finalised - should provide a solid foundation for the future marketing and product development activities planned by the Scottish Country Sports Tourism Group (SCSTG) as well as enable individual businesses to make better informed investment decisions for the benefit of domestic & overseas visitor markets alike. The finalised document will be the first national strategy that has been developed by the SCSTG on behalf of the country sports tourism sector working in partnership for the benefit of the sector at large.

It signals a renewed commitment by all those involved in the country sports industry in Scotland
The strategy has been developed to build on the strong foundations of activity from the industry, governing bodies and the public sector. As a result of implementing the strategy, it is hoped to grow

the industry’s current tourism value of £155million annual value to the Scottish economy by ?? per cent to around £??? million annually by 2020.

Until the consultation has taken place and the scale of the opportunity is identified it is difficult to say what can go into the growth figures.
As such, this will be an important piece of work & by identifying a performance measurement framework will also assist the stakeholders to monitor & evaluate the growth prospects of an industry which makes a major contribution to the Scottish economy.