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Preface

Over the past ten years Ireland has seen significant growth in the number of overseas holidaymakers engaged in activity holidays. Angling is an important component of this market. In 1996 an estimated 169,000 holidaymakers participated in angling. In a study of water-based tourism and leisure activities undertaken by the Marine Institute in 1996, angling was worth £84 million to Ireland's GNP and tourism angling supported almost 3,500 jobs. However, recent figures indicate a decline in the number of participants to an estimated 129,000 for 1999. In order for angling tourism to maximise the potential of the overseas angling market, it must match the angling product to the needs and desires of the market. Marketing and promotional effort must focus on those markets which offer the most growth potential.

In December 1999, the Marine Institute secured funding from the Tourism Angling Measure administered by the Department of the Marine and Natural Resources, to undertake a comprehensive market research study of three overseas angling markets. The three primary angling markets chosen were in Britain, France and Germany. Following consultation with Bord Fáilte and the Central Fisheries Board, Lansdowne Market Research Ltd. were commissioned to undertake research in each of the three primary markets. Key objectives of the research were to:

- (i) identify the potential overseas market for Irish angling;
- (ii) discover what obstructions exist for the Irish market in attracting overseas anglers to Ireland and
- (iii) propose appropriate courses of action, which would effect a greater demand for the Irish angling product among overseas anglers. The research was conducted in two phases.

This report presents the results of the research study together with conclusions and recommendations.

Acknowledgements

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1 Introduction

Background and Objectives

In December 1999, the Marine Institute commissioned Lansdowne Market Research to carry out a study on the potential market for Irish angling in Britain, France and Germany.

The objectives of the study were to:

- identify the potential overseas market for Irish angling in Britain, France and Germany
- discover what obstacles exist for the Irish market in attracting overseas anglers to Ireland with a view to informing future product development decisions and service propositions
- propose appropriate courses of action which would effect a greater demand for the Irish angling product amongst anglers in Britain, France and Germany

Research Methodology

Two phases of data collection were undertaken in each country.

Phase One

The first phase was quantitative or numbers based research. Questions were included, in each market, on a syndicated Omnibus survey. The questionnaires were conducted over the phone in Britain and Germany and face-to-face with the respondents in France. The questions asked are included in Appendix 'A'. Details of the sample interviewed and fieldwork dates are outlined below. In each country, the sample selected was quota controlled to be representative of the population interviewed.

Table 1.1: Quantitative Omnibus Details

	SAMPLE	FIELDWORK DATES	SAMPLE SIZE
France	All adults 15+	1st February - 10th March, 2000	3000
Germany	All adults 14+	31st January - 17th February, 2000	3000
Britain	All adults 15+	12th January - 19th January, 2000	3000

Phase Two

The second phase of research undertaken in each market was qualitative group discussions. Qualitative research is an unstructured, exploratory, research methodology based on small samples. Group discussions or focus groups are interviews conducted by a trained moderator among a small group of respondents in an unstructured, natural or conversational manner. In each of the three markets, Britain, France and Germany, three qualitative group discussions with anglers were undertaken by local moderators.

The anglers included in the group discussions were:

- Frequent anglers (at least 20 days per year)
- All male
- Non-rejectors of Ireland as a holiday destination
- Had taken an abroad angling holiday lasting four or more nights with angling the main reason for selecting the destination country. (In Britain, group participants may also have taken a two night angling holiday in Scotland)

In addition, in each group discussion:

- Not more than half had travelled to Ireland for an angling or any other holiday
- At least two had taken an angling holiday in Ireland

Group discussions were structured to ensure the opinions of a range of anglers were included in each market. The limited number of group discussions undertaken in each market however, disallows anything but very broad comparison of views between angler types. In addition it is worth noting that few anglers within the focus groups claimed to undertake just one type of angling, on the contrary most claimed they enjoyed angling occasionally for all types of fish.

The tables below detail the angler type, age and location of focus group discussions held in each country.

Table 1.2: Qualitative Group Discussions - France

GROUP	ANGLER TYPE	AGE	LOCATION	TIMING
1	Pike	30-60	Paris	February 2000
2	Game	30-60	Paris	February 2000
3	Mixed	30-60	Paris	February 2000

Table 1.3: Qualitative Group Discussions - Germany

GROUP	ANGLER TYPE	AGE	LOCATION	TIMING
1	Pike	30-60	Hamburg	February 2000
2	Game	30-60	Hamburg	February 2000
3	Mixed	30-60	Hamburg	February 2000

Table 1.4: Qualitative Group Discussions - Britain

GROUP	ANGLER TYPE	AGE	LOCATION	TIMING
1	Coarse	35-60	London	February 2000
2	Game	35-60	Sheffield	February 2000
3	Sea	35-60	Liverpool	February 2000

The objective of undertaking this phase of research was to develop a detailed profile of the committed angling tourist. Specifically to:

- develop a psychographic profile
- explore attitudes to angling holidays
- identify the key criteria in choice of destination
- identify attitudes towards, and use, of different sources of information for destination choice and holiday planning
- explore attitudes towards Ireland and competitor angling destinations
- explore media use.

2 Incidence and Frequency of Overseas Angling

In order to assess how many people can be motivated to visit Ireland for an angling holiday, it is important to know how many people in each market go angling while on holidays, irrespective of destination. In France and Germany, those who go angling while on holidays outside their own country are regarded as potential visitors. In Britain, given our proximity, those who go angling while on holidays, whether at home or abroad, are counted as potential visitors. From the findings detailed in Table 2.1 below, it is obvious that angling while on an abroad holiday is a minority interest only. Nevertheless, many of those who go angling while on an abroad holiday take more than one holiday per year, see figs 2.1 - 2.3. This information is quantitative or numbers based and was collected using Omnibus research in each market.

Table 2.1: Incidence of Angling While on an Abroad Holiday

	FRANCE ALL ADULTS 15+		GERMANY ALL ADULTS 14+		BRITAIN* ALL ADULTS 15+	
	%	'000s population	%	'000s population	%	'000s population
Any Angling abroad	3	(1,793)	5	(3,189)	9	(5,331)
Sea Angling	2	(1,195)	4	(2,551)	5	(2,962)
Game Angling	1	(598)	2	(1,276)	3	(1,777)
Coarse Angling	1	(598)	1	(638)	4	(2,369)

*Note: figures for Britain relate to any holiday at home or abroad

Britain

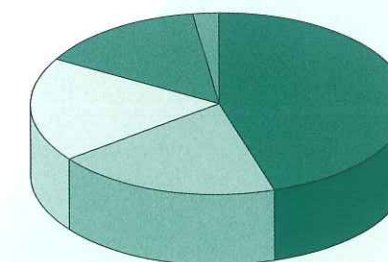
Almost one in ten British adults (9%) aged 15+ claim to have gone angling while on a holiday of one or more nights in the past three years. Sea angling is the most popular form of angling (5%), especially sea angling from shore (3%).

British anglers are quite committed to their hobby. More than half (51%) of those who had gone angling while on holiday claimed to have done so on two or more holidays in the past three years. Game and coarse anglers, are most likely to go angling while on holiday. Almost three in ten (31%) of game anglers interviewed claimed to have taken five or more holidays in the past three years during which they had gone angling.

Figure 2.1: Number of Holidays that Included Angling Activity in the Past Three Years

Britain*

- One - 44%
- Two - 19%
- Three - 14%
- Four+ - 18%
- Can't recall - 2%



Average number of holidays - 2.4

*Note: figures for Britain relate to any holiday at home or abroad

France

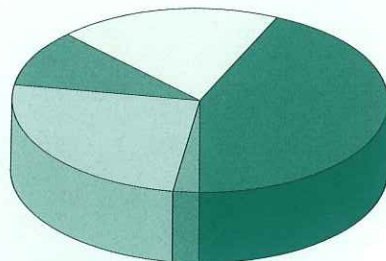
Angling is not undertaken to a great extent by the French while on an abroad holiday. Just 3% of French adults aged 15+ claimed to have gone angling on an abroad holiday in the past three years. Sea angling is the most popular form of angling activity, especially from shore and inshore.

More than half (54%) of French anglers claim to have gone angling during two or more holidays in the past three years. This suggests that once abroad, angling is popular activity, many are committed anglers and will go angling on most holidays.

Figure 2.2: Number of Holidays that Included Angling Activity in the Past Three Years

France

- One - 43%
- Two - 19%
- Three - 10%
- Four - 25%
- Can't recall - 2%



Average number of holidays - 2.8

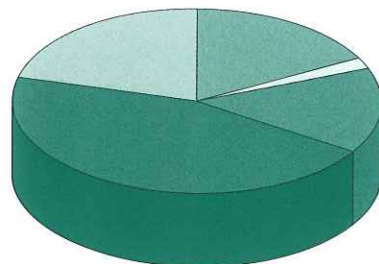
Germany

As is the case in France, angling while on an abroad holiday is not a popular activity with Germans. Just one in twenty (5%) German adults aged 14+ claim to have gone angling on an abroad holiday in the past three years. Sea angling (4%), especially from the shore or inshore, is the most popular form of activity. Game angling is the next highest in popularity, especially for salmon and sea trout. Nevertheless, as is also the case in France, German holiday anglers are quite committed to the sport. One in six of those who have gone angling while on an abroad holiday in the past three years claim to have taken four or more such holidays.

Figure 2.3: Number of Holidays that Included Angling Activity in the Past Three Years

Germany

- One - 45%
- Two - 21%
- Three - 15%
- Four - 17%
- Can't recall - 2%



Average number of holidays - 2.3

3 Profile of the Angling Tourist

A key objective of this research project was to develop a greater understanding of holiday anglers in each of the markets researched. The following chapter includes a description of anglers in each market in terms of demographics (sex, age, social class and region) and psychographics (attitudes and lifestyle). The demographic information was collected using Omnibus research in each market. The psychographic information was collected through qualitative group discussions.

Demographic Profile

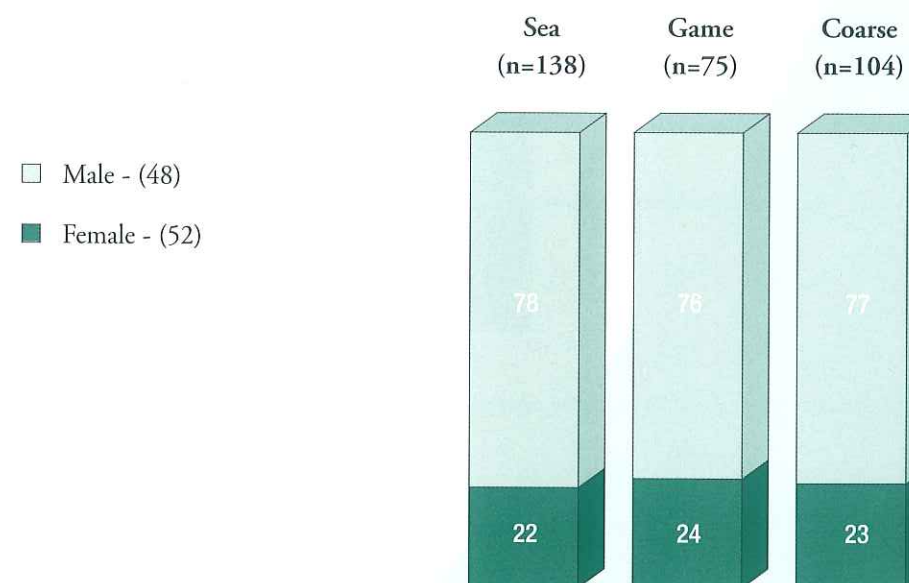
In broad terms, the profile of anglers is similar across all three markets. Anglers are most likely male and tend to be more represented amongst upmarket social class groups (ABCs) in each market. Nevertheless, there are differences between the different angling types, for example between coarse, game and sea angling. The sample in Britain only, was large enough to support this analysis and these results are shown in Table 3.1 below.

Britain

Sex	British holiday anglers are predominately male (77%).
Age	Are more likely to be in the 15-24 and 35-54 age group.
Social Class	Tend to be from the AB (Managerial/Professional) or C ₂ (Blue collar worker) social class group. Sea and game angling is a more popular activity among the AB social class group. Coarse angling is a more popular with the C ₂ Social Class group.

Regional Spread Angling is popular throughout Britain.

Table 3.1: Profile of British Holiday Anglers - Sex



Figures in brackets denote breakdown of the percentage of the British population aged 15+

Table 3.2: Profile of British Holiday Anglers - Age

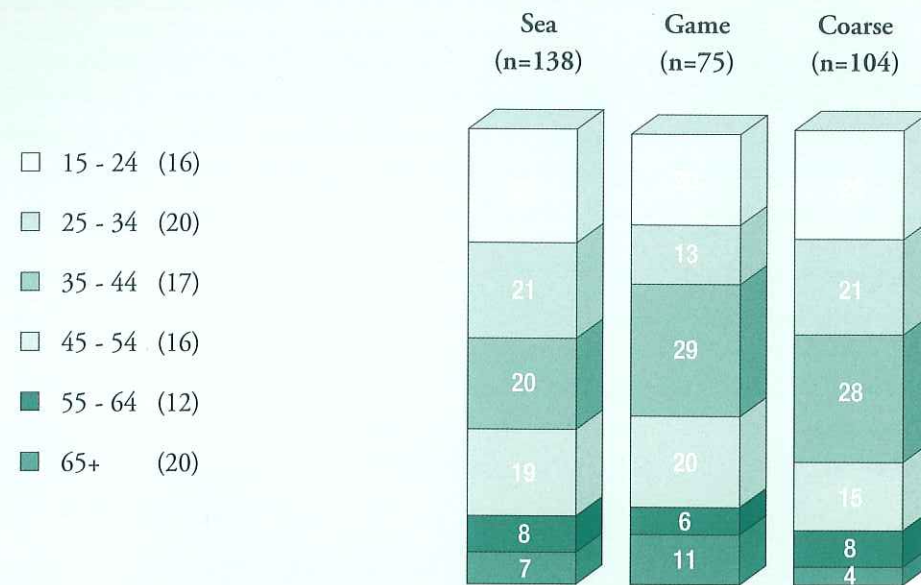
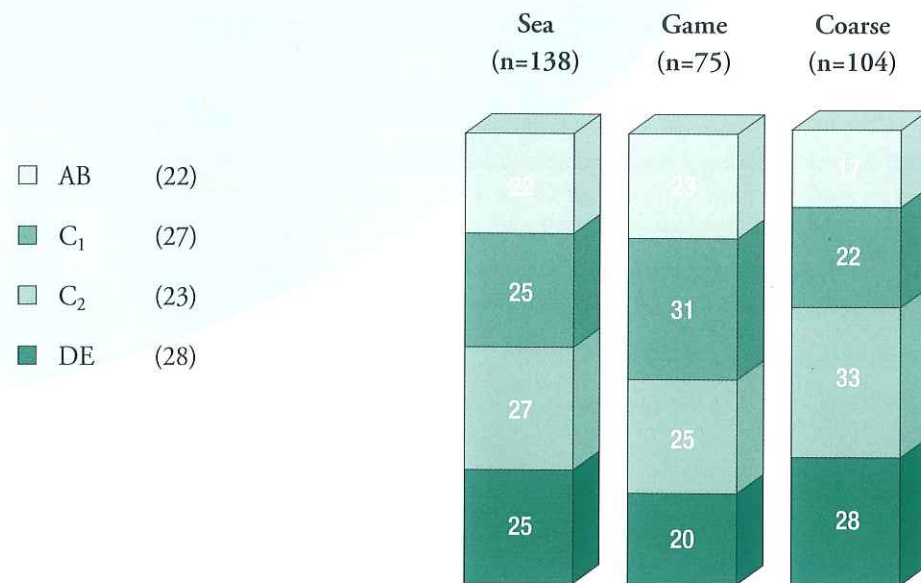


Table 3.3: Profile of British Holiday Anglers - Social Class



Figures in brackets denote breakdown of the percentage of the British population aged 15+

France

- Sex** French holiday anglers are predominately male (74%).
- Age** Are more likely to be in the 25-34 and 65+ age groups.
Sea anglers in particular tend to be under 34 years of age.
- Social Class** Tend towards the AB (Managerial/Professional) and DE (unskilled labourer/Blue collar worker and those in receipt of social welfare) social class groups.
Sea angling is more popular among the C₁ (white collar/office worker) social class group.
- Regional Spread** Are most likely to reside in the Mediterranean and South West regions.
Sea anglers in particular are strongly represented in these regions.

Table 3.4: Profile of French Who Go Angling While on an Abroad Holiday - Sex

MALE	FEMALE
74%	26%
(47)	(53)

Table 3.5: Profile of French Who Go Angling While on an Abroad Holiday - Age

	%	%
14-24	18	(18)
25-34	27	(19)
35-44	14	(19)
45-54	15	(17)
55-64	8	(10)
65+	18	(17)

Table 3.6: Profile of French Who Go Angling While on an Abroad Holiday - Social Class

	%	%
AB	27	(20)
C ₁	24	(26)
C ₂	23	(26)
DE	27	(28)
Refused	-	(-)

*Figures in brackets denote breakdown of the percentage of the French population aged 15+



Germany

- Sex** German holiday anglers are predominately male (78%).
- Age** Are more likely to be in the 35-54 age group.
Few over the age of 65+ have undertaken angling while on an abroad holiday.
- Social Class** Anglers are more likely to be from the AB (Managerial/Professional) Social class group.
Very few from the C₂ (Blue Collar) social class group tend to go angling while on an abroad holiday.
- Regional Spread** Coarse anglers are more likely to reside in West Germany.
Other angling types are more likely to reside in the North West of the country.

Table 3.7: Profile of Germans Who Go Angling While on an Abroad Holiday - Sex

	MALE	FEMALE
	78%	22%
	(47)	(53)

Table 3.8: Profile of Germans Who Go Angling While on an Abroad Holiday - Age

	%	%
14-24	12	(13)
25-34	14	(15)
35-44	29	(18)
45-54	24	(16)
55-64	13	(17)
65+	8	(20)

Table 3.9: Profile of Germans Who Go Angling While on an Abroad Holiday - Social Class

	%	%
AB	35	(30)
C ₁	33	(35)
C ₂	7	(11)
DE	2	(4)
Refused	24	(20)

Figures in brackets denote breakdown of the percentage of the German population aged 14+

Psychographic Profile

Anglers across the three markets tended to display similar personality traits and lifestyles. There is a general preference for lone or one-or-two person activities, for example reading, cycling, music or photography. They are very often nature and/or travel enthusiasts. Anglers commonly take up the hobby in early childhood and for many there is a key association between angling and the person who instructed them.

The motivation for angling is often claimed as "escapism" and that angling offers sought after freedom from professional life and from partners/family. There is also evidence of a more sub-conscious motivation for angling to affirm the male identity. Some claim that angling as an activity facilitates relationships with other males and also allows them the opportunity to undertake an outdoor activity. The adventure aspect of angling is particularly important in the German market.

Two distinct types of anglers were identified. The first group termed 'lonely fishermen', represent the smallest number of anglers. This type tend to go angling on their own and are extremely passionate about and very committed to their hobby. They desire total isolation.

The largest number of anglers, however, fall into the second type of angler, termed 'The Buddy'. 'Buddy' anglers prefer to go angling in small groups, with a maximum of four to five friends or male siblings/relations. These anglers are very interested in angling as a social occasion, allowing an opportunity to meet with fellow anglers or to create stronger relationships with male members of their family.

4 Holiday Organisation

This chapter examines how holidays (during which angling is undertaken) are organised in each of the three countries researched. The information was gathered using qualitative research, from the focus group discussions.

Key Criteria in Choice of Destination

The factors considered emerged as very similar across all three markets but there were some exceptions.

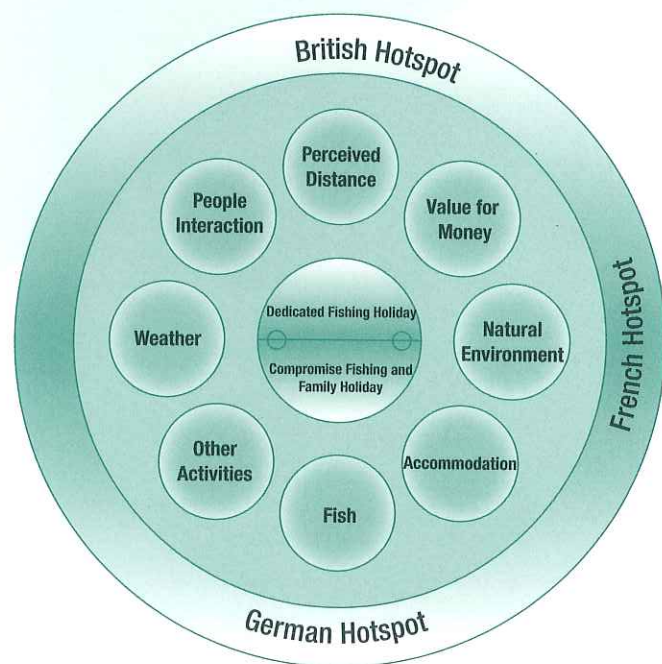
German anglers attach more importance to the quality and quantity of fish to be caught.

French anglers are more concerned about the quality of the natural environment.

British anglers are more concerned than others about the perceived distance to holiday destinations. Many claimed that, as an island nation, they are disadvantaged in terms of travel costs for holidays and are particularly sensitive to this element in their choice of angling holiday destination.

Figure 4.1 represents the criteria considered in the focus group discussions and their relative importance in the choice of angling holiday destination. Factors at the centre of the diagram are most influential in the choice of holiday destination.

Figure 4.1: Key Criteria in Choice of Angling Destination



For all, the necessity to compromise and combine angling holidays with general family holidays means that other activities can become central to the decision

As is graphically represented, the key factor dictating the choice of angling holiday destination is whether the holiday is a compromise angling and family holiday or a dedicated angling holiday. The status of the holiday in these terms dictates the relative importance of the other criteria considered.

Dedicated Angling Holiday Versus Compromise Angling and Family Holiday

Most claim that, with limited time and money available, the desire to undertake a dedicated angling holiday is most often compromised to include a number of days angling while on a family holiday.

The need to compromise and combine an angling holiday with a general family holiday means that the availability of other activities, the impact of the weather, and the range of accommodation available, can become key factors in the choice of holiday destination. Other criteria, for example

- the quality and quantity of fish
- anticipated people interaction
- perceived distance
- value for money and
- the natural environment

are taken into consideration to a lesser degree for the compromise angling/family holiday.

Dedicated Angling Holiday

The smaller number of more dedicated anglers, termed 'lonely fishermen' tend to take dedicated angling holidays. These holidays more likely to be taken as a second holiday in addition to the main family holiday. Key criteria in the choice of holiday destinations are:

- the quality and quantity of fish
- the natural environment
- the perceived distance from home and
- value for money.

The perceived performance of each of these criteria is explored in Chapter 6.

Dedicated Angling Holiday Organisation

Dedicated anglers who prefer to fish alone or with one or two friends do not, as a rule, take commercially organised group angling trips. Most prefer to make their own angling holiday arrangements, tailored for their own needs. Holiday planning and organisation depends on:

Type of Angling Anticipated: for example, sea angling requires booking boats in advance

For deep sea fishing I would ask for a tour operator

British Angler

Perceived Distance/Difference From Host Country: for example, holidays in places such as Alaska or Canada are more likely to be organised through a tour guide

I am not very keen on package trips but for the first time,

it is OK for making contact

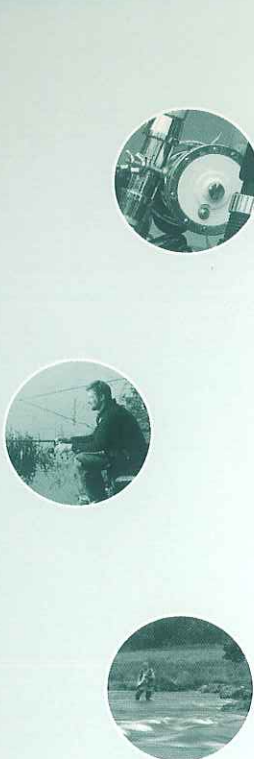
French Angler

The Intensity/Duration of Angling Required: shorter breaks (one to two days) are most likely to be organised informally rather than through a specialist tour operator. The perceived ease of organising a short angling trip to a **near location**; for example, Scotland for British anglers or the Baltic for North of Germany residents, leads many of these trips to be very impromptu affairs. More distant destinations with less familiar angling locations are claimed as requiring more professional, rigorous organisation.

To me it is too fishing orientated, 8 intensive days

is too much - it excludes family

German Angler



Sources of Angling Holiday Information

The most powerful influence on destination choice in all three markets is recommendation from other anglers. Anglers recognise that their hobby is a minority interest and frequently dismiss the advice of general tourism agents as 'less than expert'. The perceived high standard of information provided by angling experts increases the power of fishing tackle outlets in influencing angling holiday destination choice. Other sources of information have varying degrees of popularity across all three markets.

- In Britain, specialist angling magazines are very influential and *Angling Times* and *Angling Mail* are particularly popular.
- In France, few anglers claim to read specialist angling magazines with any degree of regularity. Television programmes are perceived as a very important source of angling holiday information. *Très Chasse* and *Très Pêche* on TFI as well as *Grand Reportage*, *Voyages and Seasons* on Canalsat and *Pêche et Chasse* on Cable TV are especially well regarded.
- German anglers are more similar to those in Britain in respect of their information sourcing habits. Specialist magazines are popular with 'Blinker', 'Angelwoche', 'Rute und Rolle' as well as 'Fisch und Fang' identified as the most popularly read titles. TV documentaries which feature angling destinations are also popular. See Appendix B for a list of references

A minority of anglers in the discussion groups mentioned angling fairs or exhibitions as an important source of information for holidays. This suggests that the anglers interviewed reflect the views of a different, or perhaps less involved segment of the market than currently seen at angling fairs, given that such fairs, particularly in Britain, are known to be well attended. However, the finding that most anglers who go angling at least twenty days a year claim not to attend angling fairs also suggests an untapped market for such fairs.

A small number of anglers mentioned using the web as a source of angling holiday information, and most anticipated using this resource in the future.

5 The Current Marketplace

This chapter explores the relative position of Ireland in the total repertoire of angling destinations for British, French and German anglers. The chapter is divided into two sections. Section 1 analyses anglers' experience to date and future visiting intention for the main markets. This data is quantitative or numbers based and was collected through Omnibus research. Section 2 explores data collected during the focus group discussions and explores anglers attitudes towards the main angling destinations.

Section 1 Experience to Date and Future Visiting Intentions

Britain

Apart from within Britain itself, Ireland and Spain are the most visited holiday destinations where British anglers go fishing. Ireland is the most popular destination for game and coarse angling whereas Spain is more popular for sea angling.

France and the United States are the only other destinations where significant numbers go angling while on holidays. France is most popular for coarse angling. Comparison of future intention and past experience shows that Ireland, France, Spain and the USA continue to hold appeal for anglers in Britain. It is of interest to note that more anglers wish to visit these markets for angling in the future than have currently visited.

Those intending to visit and go angling in Ireland in the future reflect the profile of British anglers generally. They are most likely aged 35-54 years and from C₂ (white-collar) social class groups. The market for angling holidays, however, is not guaranteed. More than one in six (17%) of those who have gone angling while on holidays do not intend to do so again in the next three years.

Table 5.1: Past Experience/Future Intention of British anglers

Base: All Who Claim Angling is Very/Fairly Important in Their Choice of Holiday Destination

DESTINATION	HAVE FISHED		INTEND TO FISH	
	(n = 86)		(n = 86)	
	% respondents	'000s population	% respondents	'000s population
Any Britain	83	(1,593)	61	(1,171)
- England	60	(1,152)	45	(864)
- Scotland	21	(403)	21	(403)
- Wales	14	(269)	8	(154)
Ireland	10	(192)	15	(288)
Spain	5	(96)	8	(154)
France	10	(192)	10	(192)
USA	2	(38)	4	(77)
Portugal	1	(19)	1	(19)
Canada	1	(19)	3	(57)
Germany	1	(19)	-	(-)
Other	9	(173)	5	(96)

France

Spain, Italy, Ireland and Britain (particularly Scotland) are the key markets with which the French holiday angler has experience to date. French sea anglers are most likely to have fished in Spain and Italy whereas game and coarse anglers are more likely to have fished in Ireland.

A comparison of future intention and past experience in this market shows that Ireland continues to hold an appeal for French anglers. However, less frequently visited destinations such as Canada or Portugal are also highly aspirational. A significant number of anglers intend to visit those destinations in the next three years.

Given the small number who claimed they intend to go angling while on an abroad holiday in the next three years, it is difficult to arrive at any conclusive results on the profile of likely angling visitors to Ireland. Nevertheless, it may be noted that intending anglers in the French market are represented amongst all ages, gender and social class groups.

The market demand however is not guaranteed. Almost one in five (18%) of those who have gone angling while on an abroad holiday claim they do not intend to do so in the next three years. Sea anglers are most likely to indicate they will not go on an overseas angling holiday in the next three years.

Table 5.2: Past Experience/Future Intention of French anglers

Base: All Who Went Angling on an Abroad Holiday

DESTINATION	HAVE FISHED		INTEND TO FISH	
	(n = 93)		(n = 93)	
	% respondents	'000s population	% respondents	'000s population
Spain	19	(1,135)	12	(717)
Italy	16	(956)	10	(598)
Ireland	14	(837)	11	(657)
Any Britain	12	(717)	8	(478)
- England	6	(359)	6	(359)
- Scotland	4	(239)	1	(60)
- Wales	1	(60)	-	(-)
Belgium	6	(359)	3	(179)
Canada	5	(299)	11	(657)
Portugal	5	(299)	10	(598)
Norway	3	(179)	3	(179)
Netherlands	3	(179)	1	(60)
USA	2	(120)	5	(299)
Austria	1	(60)	1	(60)
Finland	1	(60)	2	(120)
Germany	1	(60)	2	(120)
Other	28	(1,680)	20	(1,195)

Germany

Few German anglers have had an angling experience in Ireland to date. Just 1 per cent of those interviewed claim to have fished in Ireland. For German anglers, Denmark, Norway and Spain are currently the most popular markets. Denmark and Norway are especially popular amongst game anglers.

Nevertheless, comparison of intention versus experience shows Ireland is a highly aspirational country for future angling holidays. Almost one in ten (9%) of those who have gone angling while on an abroad holiday claim they are likely to visit Ireland for an angling holiday in the near future.

The market for angling holidays in Germany appears to be quite buoyant as only one in ten (10%) claim they do not intend to go angling while on an abroad holiday in the next three years. It is difficult to draw any conclusions on the profile of likely German angling visitors to Ireland given the small number of survey respondents. Nevertheless, intending anglers are most likely male, aged 35-44, from the West of Germany and are in upmarket social class groups. Coarse anglers are most likely to claim a future visit intention.

Table 5.3: Past Experience/Future Intention of German anglers

Base: All Who Went Angling While on an Abroad Holiday

DESTINATION	HAVE FISHED		INTEND TO FISH	
	(n = 134)		(n = 134)	
	% respondents	'000s population	% respondents	'000s population
Denmark	20	(1,276)	17	(1,084)
Norway	18	(1,148)	19	(1,212)
Spain	15	(957)	15	(957)
Eastern Europe	10	(638)	7	(446)
Austria	7	(446)	9	(574)
USA	7	(446)	5	(319)
Canada	6	(383)	8	(510)
Italy	6	(383)	7	(446)
Belgium	5	(319)	5	(319)
Netherlands	4	(255)	8	(510)
Any Britain	3	(191)	5	(319)
- Scotland	1	(64)	4	(255)
- Wales	2	(128)	3	(191)
- England	1	(64)	2	(128)
France	3	(191)	3	(191)
Finland	2	(128)	8	(510)
Portugal	2	(128)	5	(319)
Wales	2	(128)	5	(319)
Germany	2	(128)	2	(128)
Ireland	1	(64)	9	(574)
Luxembourg	-	(-)	2	(128)
Other	23	(1,467)	17	(1,084)

Section 2 Attitudes Towards Main Angling Destinations

Exploration of attitudes to Ireland and competitor angling holiday destinations reveals that anglers perceive four distinct types of angling holidays. These have been classified as:

- *Self Indulgent Fishing Breaks,*
- *My Fishing Heaven,*
- *Routine Compromise Holidays and*
- *Aspirational Compromise Holidays.*

The key criteria differentiating between these holiday types are the same for all three markets. These criteria are:

- family versus individual focus and
- geographical proximity.

However, for the four types of angling holiday there are different preferences for holiday destinations. Figures 5.1, 5.2 and 5.3 show the perceptual map of angling holidays and the relative positioning of the main destinations for each of the three markets.

Figure 5.1: Market Map - Britain

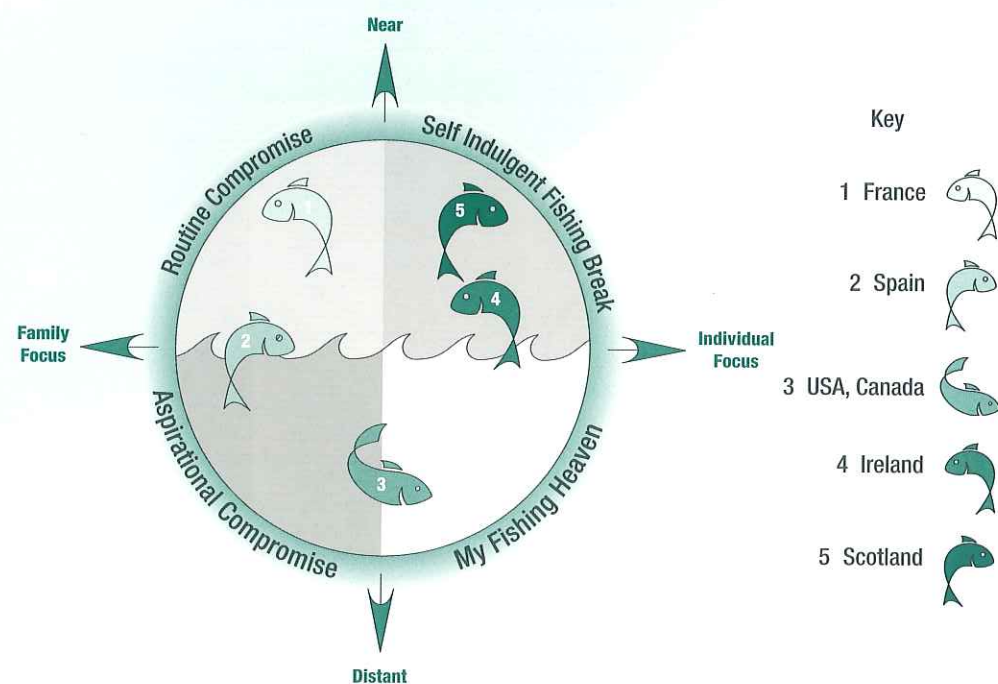


Figure 5.2: Market Map - France

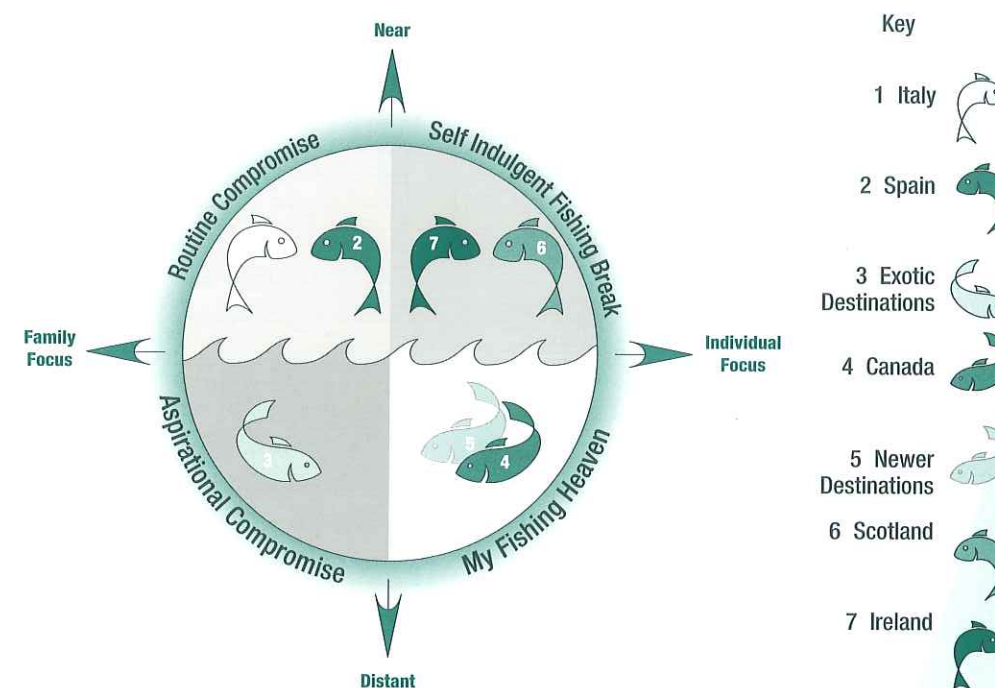
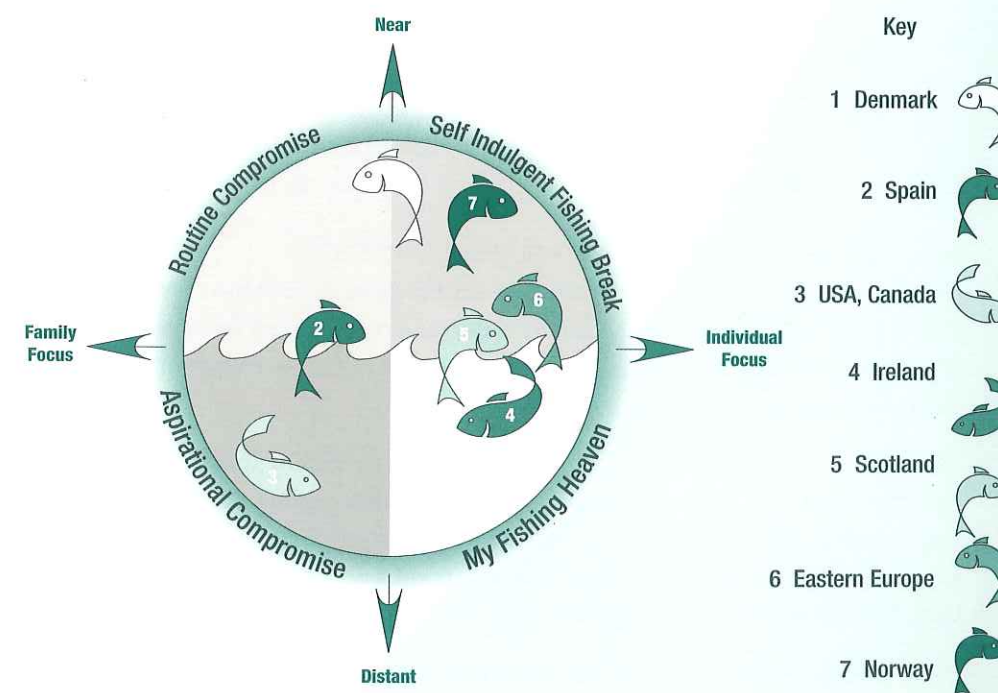


Figure 5.3: Market Map - Germany





Anglers in general are keen to explore new and exotic destinations. Nevertheless, for all three markets, there are several angling destinations close to their own country which are well regarded for angling. The ease in travel to and from these destinations is also an attraction. Few anglers are willing to subject themselves to long distance travel twice a year. This is especially the case when a dedicated angling holiday, which is most likely a second holiday to the main family holiday, is undertaken.

Self Indulgent Fishing Breaks

Angling holidays which are undertaken in areas close to home and are dedicated to angling are labelled *Self Indulgent Fishing Breaks*. Ireland competes with Scotland for *Self Indulgent Fishing Breaks* in the British and French angling market.

My Fishing Heaven

Dedicated angling holidays which are undertaken in destinations distant from the home market represent a different market segment. These holidays are labelled *My Fishing Heaven*. Anglers display a lot of interest in these types of holidays but they often remain a dream due to the perceived expense and effort required to organise the holiday. For German anglers, the perceived difficulties in travelling to Ireland, as compared to Norway and Sweden, leads many to associate Ireland with this type of holiday.

Compromise Holidays

As outlined in Chapter 4, angling is also frequently undertaken on compromise holidays. Anglers clearly divide compromise holidays into: *Routine Compromise Holidays* - those which are undertaken in locations near to their home country and *Aspirational Compromise Holidays* - those undertaken at distant locations. For the British angling market, France and Spain are identified as the most likely routine compromise destinations, whereas far away destinations such as the USA and Canada are more aspirational.

Comparison of past experience data shown in Section 1 indicates anglers are more frequent visitors to *Routine Compromise* and *Self Indulgent Break* destinations in most markets. The challenge is to communicate, particularly to the German market, the proximity and ease of travel to Ireland. At present, Ireland is not given serious consideration by many German anglers except as a *Fishing Heaven* trip.

Scotland versus Ireland as an Angling Destination

As the perceptual market maps indicate, Scotland represents an important competitor for Ireland. In France and Britain, both Ireland and Scotland compete in the *Self Indulgent Break* segment. In Germany, Scotland and Ireland are variously regarded as *Fishing Heaven* or *Self Indulgent Break* destinations.

The perception of Ireland and Scotland, as a *Self Indulgent Fishing Break* destination presents an important marketing and promotional opportunity for Irish *angling* tourism. In the British and French market, Ireland's proximity is regarded as near enough for an effortless trip, offering value for money and a quality angling experience, to support a dedicated angling trip. For many anglers, both Scotland and Ireland are regarded as "mythical" angling holiday destinations.

The key attributes which contribute to the perception of Scotland as an angling destination are the quality of fish, especially salmon and the outstanding natural/cultural heritage. There are, however, some negative associations with angling in Scotland. British and French anglers are likely to query the level of welcome anticipated from Scottish locals. Some claim that angling especially for salmon, has an upmarket bias in Scotland and is also more expensive. Some also claim that Scotland is overfished.

The key attributes which contribute to the perception of Ireland as suitable for a '*self indulgent fishing break*' include the perception of:

- a clean, green natural environment
- a less commercialised/friendly tourist infrastructure
- good quality and variety of fish which may be caught on line or rod

These positive perceptions were strongly held by those engaged in the focus group discussions. It is noteworthy that only two in each group had been to Ireland on an angling holiday. This positive attitude suggests that Ireland is very well placed to take a greater share of the *self-indulgent* angling market. A promotional campaign to encourage anglers to act on their positive perceptions and choose Ireland for an angling holiday is likely to be successful.

For French and German anglers, the perceived similarity between Scotland and Ireland can result in ambivalence as to which country is visited. Most anticipate a similar angling experience in both markets. Confusion relates to their situation in the same 'Gaelic' cultural area and the perceived similarity in landscape. Frequently, anglers from these countries will decide to go either to Scotland or Ireland but not to both markets.

While Scotland can represent for many the 'holy grail' in fishing especially for salmon, perceptions of an unwelcoming, expensive destination present key opportunities for Ireland.

6 Ireland as an Angling Holiday Destination

In this chapter attitudes towards Ireland as an angling holiday destination are examined. The chapter is divided into two sections. Section 1 details the results of the quantitative assessment of attitudes to Ireland determined from the Omnibus Survey. Section 2 explores the unstructured attitudes and opinions collected using qualitative research during focus group discussions.

Section 1 Quantitative Assessment of Attitudes

In the Omnibus Survey, anglers were asked whether they agreed or disagreed that Ireland offered:

- Good Value for Money
- Excellent Angling and
- Well Developed Amenities.

The results for each country are outlined below.

Britain

The proximity of Britain to Ireland means that British anglers are more knowledgeable about Ireland in general than anglers from other countries. Nevertheless, their attitudes are less positive. Many (two in five) are ambivalent about the 'Value for Money' offered in Ireland and in addition one quarter neither agree nor disagree that Ireland offers 'Excellent Angling' or has 'Well Developed Amenities'.

However, Ireland is well regarded, particularly amongst those who have experience of angling here. It is only in comparison to Germany and France that perceptions in Britain appear marginally less positive.

Table 6.1: Britain

Base: All Who Undertook Angling While on any Holiday of One Night or More

IRELAND OFFERS	GOOD VALUE FOR MONEY	EXCELLENT ANGLING	WELL DEVELOPED AMENITIES
	%	%	%
Strongly Agree	19	33	25
Agree	27	31	35
Neither Agree nor Disagree	38	25	28
Disagree	3	2	2
Strongly Disagree	1	1	-
Don't know / no opinion	12	8	10

France

Amongst those who were prepared to give an opinion, attitudes towards Ireland as an angling holiday destination are very positive. Two thirds of French holiday anglers agree that Ireland offers excellent angling. More than half (55%) agree that Ireland offers good value for money.

There is considerable uncertainty amongst French holiday anglers regarding the amenities available for anglers in Ireland. Just two in five agree that Ireland has well-developed amenities but almost the same number (37%) claim they don't know. Those with experience of angling in Ireland are most positive about their angling experiences here.

Table 6.2: France

Base: All Who Undertook Angling While on an Abroad Holiday

IRELAND OFFERS	GOOD VALUE FOR MONEY	EXCELLENT ANGLING	WELL DEVELOPED AMENITIES
	%	%	%
Strongly Agree	26	32	16
Agree	29	34	25
Neither Agree nor Disagree	22	17	20
Disagree	-	-	2
Strongly Disagree	-	-	-
Don't know / no opinion	24	16	37

Germany

Attitudes towards Ireland as an angling destination are more positive in Germany than in either France or Britain. German adults who have gone angling while on an abroad holiday are most convinced of the excellence of the angling offered in Ireland. Almost three quarters (74%) agree or agree strongly that Ireland offers excellent angling. Three in five (60%) are also convinced that the market offers good value for money.

There is uncertainty regarding the amenities offered in Ireland. More than one quarter of German anglers who have gone angling while on holiday abroad were not prepared to offer an opinion about the standard of amenities on offer in Ireland. Of more concern however is that one in ten (10%) either disagree or disagree strongly that Ireland has well-developed amenities for anglers. As is the case in Britain and France, those who have visited Ireland for angling are more positive about Ireland's facilities and infrastructure.

Table 6.3: Germany

Base: All Who Undertook Angling While on an Abroad Holiday

IRELAND OFFERS	GOOD VALUE FOR MONEY	EXCELLENT ANGLING	WELL DEVELOPED AMENITIES
	%	%	%
Strongly Agree	35	41	30
Agree	25	33	23
Neither Agree nor Disagree	13	5	10
Disagree	7	4	8
Strongly Disagree	3	2	2
Don't know / no opinion	17	16	26

Section 2 Exploration of Attitudes to Ireland

Ireland's perceived performance on the key attributes of importance in the choice of an angling holiday destination are detailed below. In assessing anglers' perceptions of Ireland it is important to remember the majority of those interviewed had no direct experience of angling in Ireland. Just two anglers in each discussion group were required to have visited Ireland for an angling holiday. Nevertheless, the recruitment criteria dictated that all of those spoken to were non-rejectors of Ireland as a holiday destination.

The Natural Environment

Ireland's natural environment is well regarded in all three markets. Spontaneously, Ireland evokes images of green hills, luxuriant vegetation and deep water. Anglers, especially those who have visited Ireland, are most complimentary about the water quality, and the availability of large fish which are good to eat. For many, Ireland's unspoilt environment is perceived as a product of a less industrialised economy. There was some concern, mainly from French anglers, about recent changes which could impact on the environment here. A minority felt that Ireland was becoming more commercialised and that this could have a potentially harmful effect on the environment.

Accommodation

Few French and Germans anglers who have yet to visit Ireland have a clear idea of the standard and range of accommodation available. Most assume the accommodation is basic yet adequate. The accommodation offered is perceived to be similar to that available in Scotland. Bed and Breakfast type accommodation is favoured because of its wide availability throughout the countryside and is likely to be on offer close to the chosen angling location. Many claim that prices, and in turn standards, have risen in the recent past to keep parity with Scotland. The idealised image of unsophisticated, welcoming and family-based accommodation is appealing for most anglers. Ireland is perceived as ideal for those anglers who wish to *'rough it'*.

Camping is not viewed as a feasible option given the wet climate. A minority expressed concern that, when travelling with their wives/partners, better quality accommodation such as hotels and self-catering accommodation may not be as widely available.

Perceived Distance/Travel

There are mixed views regarding ease of travel to Ireland.

In France, most anglers perceive Ireland as being within easy reach. The primary association is with short fishing breaks of perhaps 3 to 4 days, which leads most to favour travelling by air. Travelling by ferry is perceived as being too time-consuming for a short break angling holiday. The awareness of discounted/special air fares also favours the option for air travel.

In Germany, most anglers perceive Ireland as quite remote. The perception of Ireland's remoteness is heightened by:

- the proximity to good salmon angling in Norway. With good fishing available on their doorstep, anglers are less likely to explore the Irish option;
- the preference to use their own equipment and thus travel by ferry. The ferry trip from Germany to Ireland is perceived by most as too arduous to be considered;
- the practice of transporting their catch home. Few believe that this is possible from Ireland;
- the perceived expense of travel to Ireland compared to other destinations.

British anglers' geographical position increases their sensitivity to travel distances and also to cost. Ireland's unique selling point for this market is its perceived proximity. The preferred mode of travel to Ireland for British anglers is by car and ferry. This allows anglers to use their own gear, gives them the freedom to explore remote fishing spots and generally increases their comfort while angling in Ireland. It also reduces their travel costs and enhances the social aspect of the trip.

The Quality of the Angling Experience

The quality of angling in Ireland is well regarded by all anglers. The key positive aspects relate to the perceived authentic angling experience, particularly the availability of wild salmon; and the variety, quality and size of fish available as well as the wealth of angling destinations.

Many anglers criticise the practice of stocking lakes and rivers in Britain and other fishing destinations. There is a perception that Irish stocks are 'wild fish', and this is very appealing to anglers. Ireland is perceived as offering the ability to enjoy isolated fishing experiences with less-crowded lakes and rivers. Anglers also perceive Irish waters as being less polluted than elsewhere. A minority of French anglers urged caution regarding the commercialisation of angling holidays which could potentially lead to less 'wild' fishing experiences. There is also concern that the Irish angling stock could be damaged by fish farming and the use of genetically-modified salmon.

Ireland is associated with a wide variety of fish. The key associations are:

- for French anglers - salmon and freshwater fish
- for German anglers - salmon and pike
- for British anglers - pike and bream

French and British anglers are convinced of the availability of both large numbers and large specimen fish in Ireland. A small number of German anglers, who had not yet visited Ireland, expressed concern about over-fishing.

Fishing Regulations

Few anglers have any clear idea of fishing regulations in Ireland. Most assume there are relaxed licensing laws reflecting the image of a relaxed nation. A minority queried whether the regulations might be more rigorous for visiting anglers. British anglers in particular were convinced of relaxed fishing regulations in Ireland.

Knowledge of Angling Destination

For most, Ireland is perceived as having countless angling opportunities all over the country, whether in lakes, rivers or on the coast. Few however have detailed knowledge of specific places to visit. It is worthwhile bearing in mind that while all the anglers interviewed were non-rejectors of Ireland as an angling destination, few had visited the country.

In France, of the minority who had travelled to Ireland for an angling holiday, the best remembered destinations were Cork, Dingle, Connemara, Kilkenny, (below) Dublin, and the West and Centre of the country. German anglers have very limited detailed knowledge of angling locations in Ireland, but the River Shannon, particularly for pike and salmon, and the West of Ireland are best known. British anglers have the most comprehensive knowledge of Ireland. Many had visited this country though not specifically for an angling holiday. There was agreement however that Ireland offers countless angling opportunities in a diverse range of locations.

Irish People

Ireland's key point of difference when compared to competing angling destinations, is the anticipated welcome that visitors receive. Irish people are viewed as being both welcoming and genuinely friendly. Anglers with a previous holiday experience in Ireland were most complimentary. A positive *pub culture* is especially important for German and British anglers. Most claim that a visit to a lively, character-filled pub in the evenings is a key part of the angling holiday experience.

However, some concern relating to the impact of political events in Northern Ireland is evident in the British and French markets. An opportunity exists to reassure potential visitors of the limited impact the Northern conflict has on everyday life, especially in the Republic.

Weather

All three markets associate Ireland with a wet and unpredictable climate. Although most acknowledge the weather as an integral part of Ireland's charm, it is highlighted as limiting Ireland's potential as a compromise family/angling destination.

Value for Money

While it is acknowledged that Ireland has traditionally been regarded as a 'good value for money' destination there was some concern expressed about whether recent economic growth may in the future erode this value for money platform. Many claim that prices are already rising. Despite this view, all three markets claim that Ireland offers better value for money than Scotland.

Activities other than Angling

Most anglers are unaware of the availability of any activities (apart from angling) in Ireland. This could be identified as a key area of weakness in attracting overseas anglers. Many anglers are sceptical regarding the ability of Ireland to provide more sophisticated activities, especially indoor activities. This presents a key opportunity for Ireland to develop and promote non-angling activities for the *compromise fishing holiday* market. Specialist activities of particular interest to anglers are: hunting, golf and general outdoor activities.

Irish Angling Holiday Information

Few of the anglers interviewed in all three markets are aware of the availability of specific information relating to Irish angling holidays. The Tourism Brand Ireland campaign, although well known, elicits a mixed response. For many, the campaign is well regarded as projecting a strong positive image of Ireland. Others criticise the lack of practical, detailed information on holidaying in Ireland. In particular, anglers highlight the limited amount of information on activities such as angling. Anglers are keen to be assured of the availability of facilities and services on offer to the angling visitor. The availability of such detailed information in advance of the visit facilitates holiday planning arrangements.

7 Conclusions and Recommendations

Conclusions

The angling holiday market in Britain, France and Germany is relatively limited. Less than one in twenty of the adult population of France and Germany claim to go angling while on an abroad holiday. In Britain less than one in ten claim to go angling while on holiday, irrespective of whether the holiday is taken at home or abroad. Amongst this small band of enthusiasts, holiday angling tends to be undertaken as part of a *compromise family holiday* centred on non-angling activities or in the context of a *self indulgent short break* with angling the key reason for the holiday. The majority of angling holiday trips are taken within Europe. Dedicated angling holidays to more far flung destinations are aspirational but rare.

The *compromise family holiday* is the largest market segment. This reflects the profile of holiday anglers who are predominately male and married.

In order to compete in this market Ireland needs to provide a holiday product which satisfies the anglers' needs and also provides activities of interest to other members of the family.

Although Ireland is well regarded by anglers in terms of the angling experience, few believe that Ireland is a family-friendly destination. Wet weather and the perception of less developed indoor activities are key issues. In this context Ireland does not compare favourably with the *compromise family holidays* offered by other European destinations such as Spain, Portugal and France. Analysis of routine compromise destinations i.e. those which are relatively convenient and close to home, shows that France and Spain pose the greatest competition to Ireland for the British angling market. For the French market, Italy and Spain offer the greatest competition. In the German market, Spain, Austria and the Netherlands emerge as key competing destinations.

Ireland performs better in the smaller *self indulgent fishing break* market. These dedicated angling holidays are most likely to be undertaken by lone anglers or by a small group of fellow enthusiasts. The key positive points associated with undertaking a holiday of this type in Ireland are, the perceived quality of the fishing experience, especially for salmon and pike; the image of Ireland as an unspoilt, untouched, green landscape; the anticipation of a friendly welcome among the local people and the assumed value for money. For many anglers, especially those in the British and French market, the close geographical proximity of Scotland and Ireland and the assumed similarities in terms of culture, weather and the angling experience, leads to poor differentiation between the angling holiday product on offer in the two markets. Scotland therefore represents very strong competition in the *self indulgent fishing break* market.

The potential to visit Ireland for an angling holiday is dictated to a large extent by the perceived amount of travel time needed to get here. German anglers perceive an angling trip to Ireland or Scotland as relatively arduous when compared to an angling trip to Denmark or Norway. In addition, these destinations are also perceived to offer good fishing in terms of the quantity and size of fish catch. An angling holiday in Ireland or Scotland is more likely to be considered as very special or a *once in a lifetime* holiday for which careful advance planning is necessary. However, this is not the perception of British and French anglers. For them, Ireland as a destination is perceived to be close enough for frequent short angling holidays.

The strength of competition provided by Scotland in the *short break* market and by other European destinations such as Spain, Portugal and France in the routine *compromise family holiday* market highlights the need to address some of the negative attitudes towards Ireland as an angling destination. The key negative attitudes include the perception that few believe Ireland is a family-friendly holiday destination; and the negative impact of the Celtic Tiger economy in terms of rising prices and increased commercialisation.

Recommendations

A number of opportunities exist to promote Irish angling holidays. The key strategic decisions for all three markets lies in the choice of promoting Ireland in the *self indulgent fishing break* market or the *routine compromise holiday* market.

The advantage of promoting Ireland in the former market is that most anglers already perceive Ireland as appropriate for this type of holiday. Thus less investment and a more focused campaign is required for promoting this product. Effort directed at promoting Ireland as a *compromise family holiday* destination could well erode its image as an unspoilt, non-commercialised angling destination. It is recommended that consideration should be given to promoting Ireland primarily in the *self indulgent fishing break* market sector. Promoting Ireland as a *compromise angling holiday* destination should be a secondary objective.

In promoting Ireland as a dedicated angling destination, a number of strategies are worthy of consideration.

Product

Promote the untouched, unspoilt nature of angling in Ireland by promoting wild fish stocks; the possibility of fishing alone; and the ease of arranging an impromptu fishing weekend in Ireland. For example, the promotion of weekend breaks which allow the 'Freedom to Explore'. The package should include ferry and car hire or air travel tickets, plus maps and recommended accommodation. In this way, each angler can have an individual angling experience in Ireland.

Differentiated strategies for individual markets are also worthy of consideration. In Britain it is recommended that anglers are reassured of the safety of travel in the Republic and Northern Ireland. Consideration should also be given to promote cost savings of Irish holidays and the ease of travel to Ireland in comparison to Scotland and France.

The profile of French anglers suggests it may be worthwhile communicating the solitude and culture available in Ireland, and the first class authentic cuisine available. Reassurance of the availability of wild fish stocks would be a key promotion factor for this market.

German anglers are differentiated from the other two markets researched in that they are keenly interested in the adventure aspect of angling. Promotion should communicate hunting, and riding options available. Communications should also focus on the adventure aspect of angling in Ireland and thrill of catch as well as the unique experience of fishing in Ireland versus more convenient competitor markets such as Denmark/Norway. Consideration should also be given to the promotion of package deals which allow anglers to sample 'pub culture' as well as good angling. Opportunities also exist to communicate travel options which allow anglers to carry own equipment and the availability of facilities for storing fish, where appropriate.

Price

At present, the perception of Ireland's 'value for money' may be under threat. An opportunity exists therefore to communicate value for money Irish holidays while underlining the high standard and quality of accommodation available. Given the strength of competition represented by Scotland, it will be important to ensure price parity versus this market.

Promotion

There are two key tasks to be addressed in the promotion of angling in Ireland. The first task is to underline the solitude and beautiful natural environment which can be enjoyed through angling in Ireland. Bord Fáilte has been successful in communicating the beauty of Ireland. Anglers however are becoming more sceptical about the opportunities that exist for fishing in solitude. The awareness of a growing economy and labour force is leading many to re-think their idealised perceptions of a sparsely populated, relaxed fishing environment. Promotional effort should be careful to highlight a 'secret' angling destination.

Targeted Direct Mail Whisper campaigns are perhaps most appropriate to communicate this message about Ireland. Other media, for example specialist magazines, TV, and the Internet, may be better utilised to support the perception of Ireland as an unspoilt beautiful environment with strong cultural traditions.

The second promotional task is to promote the facilities and services available in Ireland. It is necessary to reassure anglers that although Ireland can be perceived as a quiet, relaxed angling destination, the services and facilities required for modern living are available and may be easily and cheaply accessed.

Differentiated promotional strategies for individual markets are suggested.

Britain

Concerns remain about the possible impact of political events in Northern Ireland on holidaymakers in Ireland. Assurance is needed to allay these concerns.

France

French anglers are most concerned about the standard of accommodation and facilities available in Ireland. In promoting Irish angling holidays it will be necessary to clarify exactly what is on offer. The popularity of angling television programmes supports the possibility of screening 'slice of life' examples of angling holidays in Ireland to reassure the market on standards and on the range of facilities and accommodation available.

Germany

German anglers require detailed information on the facilities and services available here. A promotional pack which includes contact information for Tourist Boards, gillies, accommodation and travel experts/operators is recommended. Promotional effort also needs to reassure anglers of the ease and short time needed to travel to Ireland from Germany.

Irish People

With the increasing perception of Ireland as a growing busy economy, anglers in all three markets are becoming concerned about the whether the quality of welcome can be maintained. Assurance of a 'friendly' individualised welcome is needed.

Competing Destinations

Ireland faces stiff competition in both the *compromise family holiday* market and the *short fishing break* market. A key strategic consideration must be to ensure that the Irish angling product is competitive

In Britain and France, Scotland represents the greatest threat to the future growth of short break angling holidays. In the German market, Scotland is also a key competitor but for more aspirational, once in a lifetime, angling holidays. Denmark and Norway are more likely to be chosen for short, frequent angling trips.

The Irish angling holiday product offer should be distinct from that available in Scotland. Opportunities exist to promote:

- a friendlier, more relaxed angling experience
- the variety of cultural/heritage excursions available
- value for money
- the range and variety of angling activity available in Ireland

In addition, particular care should be taken to promote Irish angling breaks in Germany. Communications should focus on the ease of travel to Ireland, and the possibility of lone angling as compared with crowded conditions in Norway and Denmark.

Appendix A: The Questionnaire

MARINE INSTITUTE – ANGLING QUESTIONNAIRE

UK Questionnaire - Format for Data Tape

CARD ONE COL. 79/0, 80/1

Country Code 0 2
(1) (2)

Questionnaire Number
(3) (4) (5) (6)

Sex
Male 1 (7)
Female 2

Marital Status
Married 1 (8)
Single 2
Separated/widowed/divorced 3

Age
Exact Age (if possible)
(9) (10)
18-24 0 (11)
25-34 1
35-44 2
45-54 3
55-64 4
65+ 5

No. of Children in Household
0 1 2 3 4 5 6 7+ (12)

Ages of Children
Aged under 5 years 1 (13)
Aged 5-10 years 2
Aged 11-16 years 3
Aged over 16 years 4

Social Class (or equivalent)
AB 1 (14)
C1 2
C2 3
DE 4
(Guideline list for coding to be supplied)

Geographical Region (15,16)
As applicable

Income (if possible) (17)
As applicable
(S.O.T. Bands . As supplied for each market)

Education (18)
As applicable

Linguistic Area/Race (if possible)
As applicable (19,20)

N.B. Weighting Factor to be located

In Cols. (73 - 78), Card 4

CARD ONE

United Kingdom

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Q.1 Have you done any of the following while on a holiday of one or more nights during the past three years? MULTI-CODE POSSIBLE.

INTERVIEWER : IF FISHING ASK:
WAS THAT, PIKE, OTHER COARSE,
SALMON, SEA TROUT, BROWN
TROUT, SEA ANGLING – FROM
SHORE, SEA ANGLING - IN SHORE,
SEA ANGLING - DEEP SEA, AND
CODE IN GRID OPPOSITE.

IF SAILING ASK: WAS THAT IN
YOUR OWN SAIL BOAT OR
TRAINING OR LEARNING TO SAIL
OR YACHT CHARTER.

READ OUT	(21)	(21)
Fishing for:	1	
Pike	2	
Other Coarse	3	
Salmon	4	
Sea Trout	5	
Brown Trout	6	
Sea Angling - From Shore	7	
Sea Angling - In Shore	8	
Sea Angling - Deep Sea	9	
Other (Specify _____)		
_____ & Code	0	
	(22)	
Sailing	1	
Own sail boat		
(i.e. sailing to Ireland under own sail)	2	
Training/learning to sail	3	
Yacht charter	4	
Other (Specify _____)		
_____ & Code	5	
Scuba diving	6	

INTERVIEWER FOR EACH ACTIVITY ENGAGED IN AT Q.1 ASK QUESTIONS
2 – 6 BEFORE GOING ON TO ASK ABOUT NEXT ACTIVITY

Q 2 How many holidays of one night or more have you taken over the past 3 years
where you went _____ (activity)?

	Fishing (23)	Sailing (24)	Scuba Diving (25)	(23 – 25)
• One	1	1	1	
• Two	2	2	2	
• Three	3	3	3	
• Four	4	4	4	
• Five	5	5	5	
• Six	6	6	6	
• More than six	7	7	7	



Q.3 Where did you go _____ (activity) while on holiday during the past 3 years?
 IF UK, ASK: Was that Scotland, England or Wales?
 IF MORE THAN ONE HOLIDAY AT Q.2, ASK Q.4. OTHERS GO TO Q.5.

	Fishing (26)	Sailing (28)	Scuba Diving (30)	(26 – 31)
Austria	1	1	1	
Belgium	2	2	2	
Canada	3	3	3	
Denmark	4	4	4	
Eastern Europe (Poland/Czech Rep/Hungary/Russia)	5	5	5	
Finland	6	6	6	
France	7	7	7	
Germany	8	8	8	
Ireland	9	9	9	
Italy	0	0	0	
	(27)	(29)	(31)	
Luxembourg	1	1	1	
Netherlands	2	2	2	
Norway	3	3	3	
Portugal	4	4	4	
Spain	5	5	5	
U.K.:				
England	6	6	6	
Scotland	7	7	7	
Wales	8	8	8	
USA	9	9	9	
Other (Specify & Code) _____	0	0	0	

Q.4 In which of these countries did you go _____ (activity) on the most recent holiday abroad?
 READ OUT LIST IN TURN – RANDOMISED SEQUENCE.

READ OUT	Fishing (32)	Sailing (34)	Scuba Diving (36)	(32 – 37)
Austria	1	1	1	
Belgium	2	2	2	
Canada	3	3	3	
Denmark	4	4	4	
Eastern Europe (Poland/Czech Rep/Hungary/Russia)	5	5	5	
Finland	6	6	6	
France	7	7	7	
Germany	8	8	8	
Ireland	9	9	9	
Italy	0	0	0	
	(33)	(35)	(37)	
Luxembourg	1	1	1	
Netherlands	2	2	2	
Norway	3	3	3	
Portugal	4	4	4	
Spain	5	5	5	
U.K.:				
England	6	6	6	
Scotland	7	7	7	
Wales	8	8	8	
USA	9	9	9	
Other (Specify & code) _____	0	0	0	

Q.5 And in which of these countries are you likely to go _____ (activity) while on holiday during the next 3 years? READ OUT LIST IN TURN – RANDOMISED SEQUENCE.

READ OUT	Fishing (38)	Sailing (40)	Scuba Diving (42)	(38 – 43)
Austria	1	1	1	
Belgium	2	2	2	
Canada	3	3	3	
Denmark	4	4	4	
Eastern Europe (Poland/Czech Rep/Hungary/Russia)	5	5	5	
Finland	6	6	6	
France	7	7	7	
Germany	8	8	8	
Ireland	9	9	9	
Italy	0	0	0	
	(39)	(41)	(43)	
Luxembourg	1	1	1	
Netherlands	2	2	2	
Norway	3	3	3	
Portugal	4	4	4	
Spain	5	5	5	
U.K.:				
England	6	6	6	
Scotland	7	7	7	
Wales	8	8	8	
USA	9	9	9	
Other (Specify & Code) _____	0	0	0	
Don't intend going _____ (activity) on holiday in the next three years	X	X	X	

Q.6 How important was _____ (activity) in your choice of
(COUNTRY FROM Q.3/4 AS APPROPRIATE) as your holiday destination?

	Fishing (44)	Sailing (45)	Scuba Diving (46)	(44 – 46)
• Very important	1	1	1	
• Fairly important	2	2	2	
• Not very important	3	3	3	
• Not at all important	4	4	4	

INTERVIEWER: REPEAT QUESTIONS 2-6 FOR NEXT ACTIVITY UNDERTAKEN AT Q.1

ASK ALL UNDERTOOK FISHING AT Q.1 (CODES 1 – 0) – OTHERS GO
TO NEXT SECTION

Q.7 I am going to read out a number of statements other people have made about Ireland as a fishing holiday destination. Using the following scale – strongly agree, agree, neither agree nor disagree, disagree, disagree strongly – how strongly would you agree or disagree with each of the following statements?

	Strongly Agree	Agree	Neither Agree Nor Disagree	Disagree	Disagree Strongly	Don't know	
Ireland offers good value for money angling holidays (47)	1	2	3	4	5	6	(47)
Ireland offers excellent angling (48)	1	2	3	4	5	6	(48)
Ireland has well developed amenities for a fishing holiday (49)	1	2	3	4	5	6	(49)

*We will be conducting some further research amongst anglers over the next few months and
I would like to invite you to participate.*

Q.8 Do I have your permission to
recontact you close to the time
to invite you to become involved?

	(50)
Yes	1 CONTINUE
No	2 GO TO NEXT SECTION


INTERVIEWER: RECORD RESPONDENT NAME, ADDRESS AND CONTACT
TELEPHONE NUMBER(S)

Name: _____
Address: _____

Telephone No: _____



Appendix B: References

- "Angling Times", E Map Active, London, England
 - "Angling Mail", I P C Media, London, England
 - "Trés Chasse", TFI, France
 - "Trés Pêche", TFI, France
 - "Grand Reportage", Canalsat, France
 - "Voyages", Canalsat, France
 - "Seasons", Canalsat, France
 - "Pêche et Chasse", Cable TV, France
 - "Blinker", Blinker Postfach, Hamburg, Germany
 - "Anglewoche", Jahr Verlag, Hamburg, Germany
 - "Rute und Rolle", Top Specialist Verlag, Hamburg, Germany
 - "Fisch und Fang", Fisch und Fang, Singhofen, Germany
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