

Sea Anglers, Holidays and Holidays in Ireland for:



2011

Executive Summary

Research carried out by Bauer Media, publishers of:



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- The objective of this research was to gain insight into GB anglers' holiday habits and their perceptions of Ireland as an angling destination.
- On page advertisements directing readers to an online survey were placed in Angling Times, Improve Your Coarse Fishing, Sea Angler, Trout & Salmon and Trout Fisherman magazines throughout January 2011.
- In addition, emails promoting the survey were sent to the Bauer Coarse, Game and Sea email databases (these databases are made up of readers of *Angling Times*, *Improve Your Coarse Fishing*, *Sea Angler*, *Trout & Salmon*, *Trout Fisherman* and visitors of the *Go Fishing* website).
- Fishing gear worth over £3k was offered as a prize.
- 3560 surveys were completed. Of these respondents, 1807 do coarse fishing, 1409 do game angling and 1268 are involved in sea fishing.
- *This sample doesn't represent the entire GB market, rather the more passionate, dedicated sector that interacts with magazine brands.*

A double page magazine ad for the survey:



The email sent to database recipients:

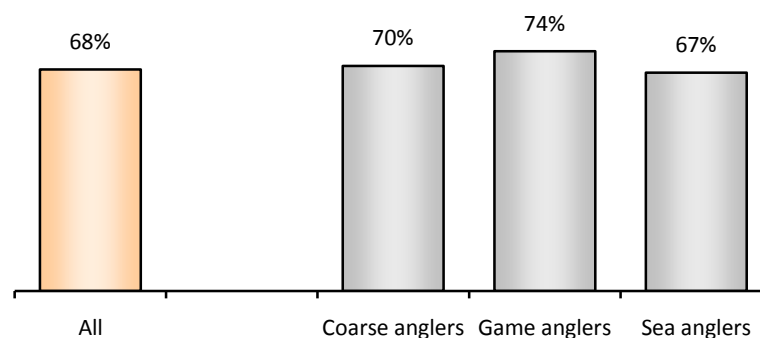


Executive Summary

Angling holidays in general

- Angling holidays are an important part of being a sea angler. 67% of sea anglers have been on a holiday in the last 3 years (slightly lower than game or coarse anglers). This rises to 76% for those who fish from charter boats. The average sea angler has been on 4 angling holidays in the last 3 years - more than one a year.

Percentage of anglers who have been on an angling holiday in the last 3 years:



- Certain groups have a higher propensity to take angling holidays. Game anglers are slightly more likely to travel - possibly because the best trout and salmon areas tend to be found in specific locations (such as Scotland). The 55-64 age group and those in social groups A and B are also more likely to take holidays, which is likely to be down to higher levels of disposable income. More experienced anglers are also more likely to travel.
- The key barriers to going on angling holidays are unsurprising and tend to reflect the commitments of 30-50 males in general. Family, time, work and money are all factors that stop anglers taking holidays.
- Of the destinations sea anglers have been to in the last 3 years, 19% have been to Ireland in the last 3 years (26% have been to Ireland at all - slightly lower than coarse or game fishermen). Ireland is their 4th most visited location after England, Wales and Scotland.
- While 23% of sea anglers focus entirely on fishing on their holidays, the remainder do other activities too. Compared to coarse and game anglers, those who fish in the sea are more likely to engage in wider activities.
- Their favourite non-angling activities on holidays include sightseeing, hiking and culture/heritage.

- Of the destinations sea anglers would like visit in future, Ireland is top (52%), followed by Norway (49%) then England (35%).

Destinations anglers would like to visit in future

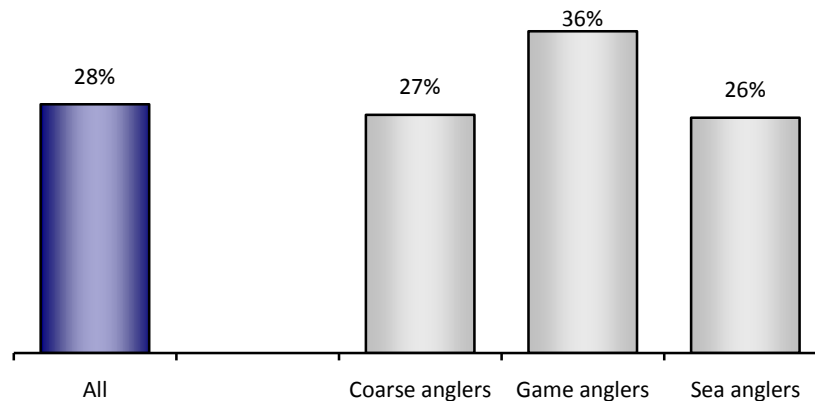
Sea anglers	
Ireland	52%
Norway	49%
England	35%
Scotland	33%
Wales	23%
North America	22%
Australasia	15%
Other European country	13%
Africa	13%
France	12%
South America	10%
Asia	6%

- Despite the economy, 72% of sea anglers are likely to go on an angling holiday in the next 12 months. This rises to 77% for boat anglers.
- The internet (82%) and magazines (64%) are the key ways for sea anglers to find information when choosing a holiday.
- The average sea angler will book their holiday 16 weeks prior to travelling. 22% book more than 6 months before their trip.
- When choosing a destination, quality of angling is their main concern (71%), followed by value for money (60%) then variety of angling (40%).
- In terms of seasonality, summer is the most popular time for angling holidays (71% go in these months) but 53% take spring trips and 51% go in autumn. Although the winter is quieter (21%) sea anglers are twice as likely to go on breaks during this time than coarse or game equivalents.
- Sea anglers are most likely to stay in self-catering accommodation (57%) or hotels (35%).
- When booking, 81% prefer to book the constituent part of their holiday themselves. They are similarly independent which it comes to accommodation: self-catering is there preferred option.

Angling holidays in Ireland

- 26% of sea anglers have been to Ireland on a fishing trip - lower than game or coarse anglers. As with general angling holidays, more mature age groups, higher level anglers and those in the top social grades are more likely to have been.

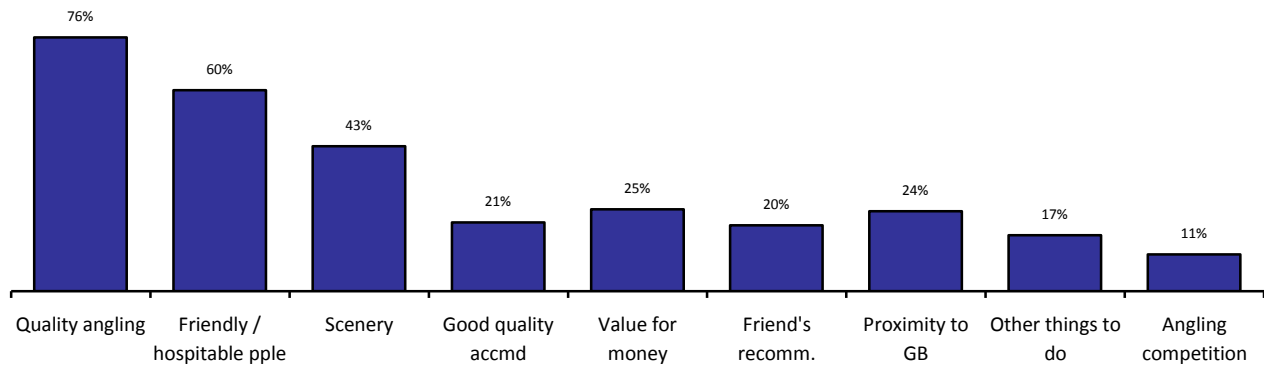
Percentage of anglers who have been on an angling holiday to Ireland:



- Unsurprisingly, Sea anglers prefer coastal regions. Cork is the most popular area for visiting sea anglers (41% of those who have been to Ireland went to the county) followed by Kerry (36%) and Galway (27%).
- A number of sea anglers who went to Ireland also took part in other types of fishing. 28% participated in coarse angling and 35% did game angling.
- 77% of visiting sea anglers took part in shore fishing and 48% fished from a charter boat.
- When rating Ireland, sea anglers are particularly positive about the quality of angling - they rate this higher than coarse or game anglers. They are less likely to describe the weather, price of travel and availability of information as 'excellent'.
- The typical sea angler's holiday to Ireland lasted for just over a week. 41% went for longer than a week. They are most likely to travel with friends (54%) or family (45%).

- The biggest draws for sea anglers to Ireland as a holiday destination were quality of angling (76%), the Irish people (60%) and scenery (43%).

Factors that attracted anglers to Ireland:



- Of those who have been to Ireland, 77% are likely to return. This is significantly higher than game (69%) or coarse (63%) anglers.
- The overwhelming reason for sea anglers not having visited Ireland is that they would 'like to, but haven't got round to it'. This suggests that there is potential to increase the numbers visiting. Of those who haven't been, 42% are likely to go in future.
- In terms of sea anglers' perceptions of Ireland as a destination, it performs well in terms of hospitable people, great scenery and great angling. Again, it performs less strongly in value for money. Compared with coarse and game anglers, they are more positive about the quality of angling and the ease of getting there.
- Those who have been to Ireland and those who have not have a similar perception of Ireland as a destination. The key difference is that overall, those who have been are more positive about the country.
- 43% of sea anglers consider Ireland to be more expensive than other locations. Only 8% think it tends to be cheaper.

Sea anglers

- The disciplines in angling are not completely distinct and there is crossover between them. 28% of sea anglers do game fishing and 28% take part in coarse angling. Sea anglers are more likely than other anglers to do more than one discipline - presumably because sea fishing isn't always the most accessible form of angling.
- Shore fishing is the most popular form of sea fishing with 87% do it. 35% fish from charter boats and 21% fish from their own vessels. Again there is crossover between the sub-disciplines with 84% of salmon anglers also being brown trout anglers.
- Sea angling is male-dominated. 96% are men and only 2% are women.
- The average sea angler is 49 (a higher average age than sea or coarse anglers). 34% are over 55. 19% are retired.