
**The Contribution of Deer
Management to the Scottish
Economy**

Executive Summary

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1 Executive Summary

Introduction

This study was commissioned by the Association of Deer Management Groups (ADMG) in order to assess the total current contribution of deer management to the Scottish economy.

Deer management in Scotland is undertaken for population control, for environmental reasons and within the context of stalking with visiting sportsmen. Deer are unusual in the sense that they are viewed as both asset and pest, and management for control and for sport largely go hand in hand. This study brings together the economic impact of deer management for both control and sporting purposes.

The impacts of deer shooting *for sport* in Scotland are derived from PACEC's parallel study, undertaken for the British Association of Shooting and Conservation (BASC), The Countryside Alliance and the Country Land and Business Association (CLA), and in consultation with the Game Conservancy Trust (GCT), to assess the economic and environmental impact of sporting shooting in the UK.

Data relating to *non-sporting* deer management in Scotland was collected using an additional questionnaire designed specifically for and sent to ADMG members. Key findings from this questionnaire can be found in section 1.3.

Section 1.2 below details the total cost of deer management in Scotland and presents the contribution of deer management to the Scottish economy in the form of jobs supported and the value of this employment (the 'Gross Value Added' or 'GVA').

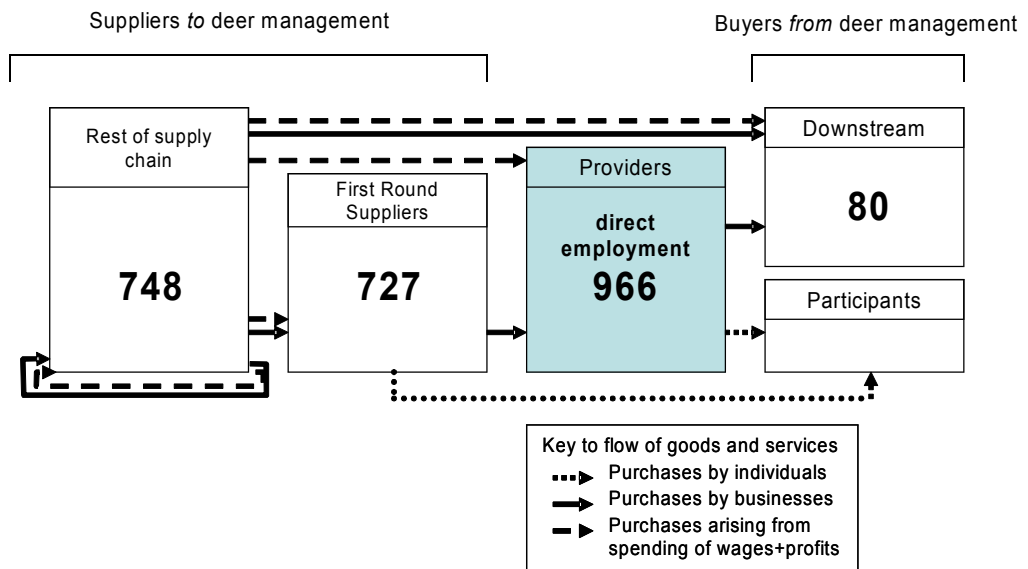
2 The Contribution of Deer Management to the Scottish Economy

3 Total costs associated with all deer management in Scotland amounted to £105 million in 2005.

4 Two thirds of this spend was retained in Scotland.

5 Deer management in Scotland supports the equivalent of 2,520 paid full time jobs in the country.

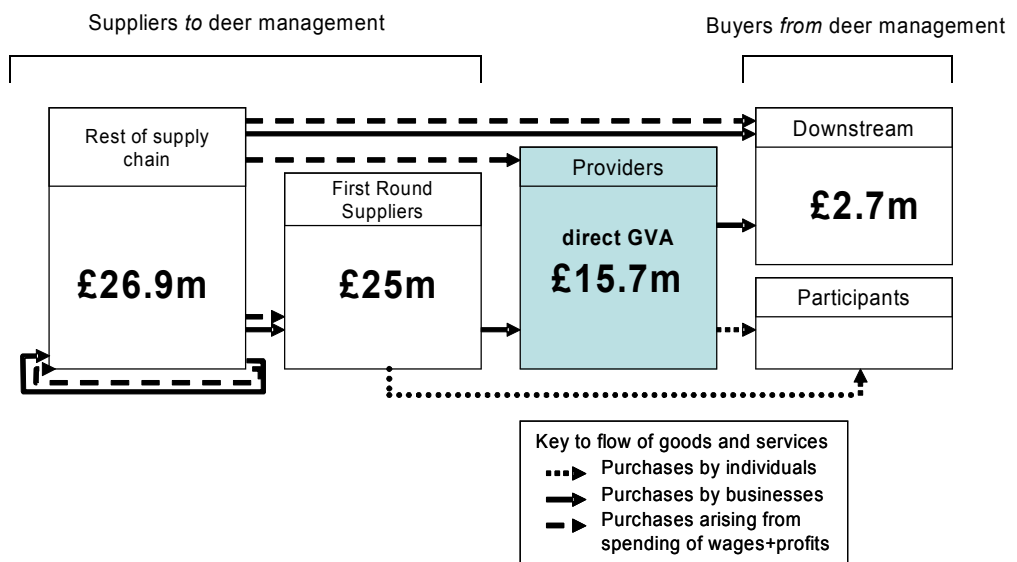
Breakdown of Direct and Indirect Employment supported by deer management in Scotland (paid Full Time Equivalents)



Source: PACEC

6 The value of this employment to the Scottish economy is £70.4m.

Breakdown of Direct and Indirect GVA supported by deer management in Scotland



Source: PACEC

Key Findings from the ADMG questionnaire¹ (deer management *not for sport*)

1	An average (mean) of 1.8 stalkers (or 0.9 Full Time Equivalents) are required per shoot site (where the average size of shoot site was 7,984 ha) in order to carry out the necessary deer management.
2	The average (mean) operational expenditure per site across 43 respondents was £54,468 per annum, of which £25,726 (47%) was spent on staff (including sub-contractors)
3	The typical (median) operational expenditure (including wages) relating to deer management (not for sport) per site is £27,000 per annum, with £26,000 staying in Scotland.
4	The typical (median) capital expenditure relating to deer management (not for sport) per site is £2,200 per annum, with £950 staying in Scotland. On average, £520 is spent per site on fencing alone each year.

7 Glossary

8	Capital Expenditure	9	Money spent to acquire or upgrade physical assets such as buildings and machinery.
10	Downstream	11	Businesses supplied by providers e.g. game processors, craft.
12	First Round Suppliers	13	Businesses which supply providers and participants directly with goods and services e.g. shooting agent; gun dealer; taxidermist.
14	Full Time Equivalent (FTE)	15	The number of full-time employees that could have been employed if the reported number of hours worked by part-time employees was worked by full-time employees.
16	Gross Value Added (GVA)	17	The standard monetary measure of the value of economic activity. Usually estimated as the sum of employment costs plus profits, but since many providers run at a loss, profits of providers have been excluded in this study.
18	Operational Expenditure	19	The on-going costs for running a business e.g. ammunition; insurance; feed for ponies/dogs.
20	Participant	21	Those who take part in the management of deer for sport and either pay to do so, or do so for nothing. Providers may also be also participants.
22	Provider	23	An organisation/business (with employees and/or members) or individual who undertakes deer control or performs services (either paid or voluntary) which give rise to opportunities for sporting shooting.
24	Supply Chain	25	The sum of all goods and services purchased by businesses further down the supply chain;

¹ The following results are taken from the deer management survey sent to ADMG members. The questionnaire, which looked exclusively at deer management not for sporting purposes, was designed to compliment the national study's survey which considered the impacts of deer stalking, amongst other forms of sporting shooting.

goods and services purchased from wages and profits in companies further down the supply chain; and imports.