

The Contribution of Deer Management to the Scottish Economy

Summary of report prepared by
PACEC
on behalf of
The Association of Deer Management
Groups

PACEC
Public and Corporate
Economic consultants
www.pacec.co.uk

- This study was commissioned by the Association of Deer Management Groups (ADMG) with support from the Lowland Deer Network Scotland (LDNS) and the Scottish Gamekeepers Association (SGA) in order to assess the current contribution of deer management to the Scottish economy.
- This report builds on work carried out for a 2006 survey on deer stalking. The 2006 study was also compared with work carried out in 2013/14 for BASC which suggests that the total level of stalking activity in Scotland is comparable with the 2006 estimate and that expenditure is likely to have risen in line with inflation since that point.
- The total coverage of the survey is 1,830,000 ha, approximately 25% of the total area of Scotland's land mass. The average size of landholding is 6,800 ha, with the median 4,600 ha.
- The main reasons given for deer management are to control the population so it does not exceed the carrying capacity of the land, to protect woodland, and to provide shooting sports opportunities.
- Two thirds were members of deer management groups with formal written management plans in place.
- A clear majority of respondents (83%) said that monitoring and assessment of the deer habitat is undertaken within the area of their DMG .
- 86% of the landholdings participate in counting the deer population in their area.
- Red deer populations were thought to be falling, whereas roe and sika deer populations were thought to be rising.
- Deer management practices include shooting, fencing, and supplementary feeding.
- Reasons given for shooting include sport, conservation, agricultural protection of crops/woodland, and public safety.
- Landholdings reported that herbivore impacts by animals other than deer had decreased over the last decade.
- The main economic and environmental effects, if deer management were to cease, were thought to be job losses and damage to woodland and commercial forestry plantations.

- 80% of the respondents were members of the ADMG.
 - Most of the landholdings said they managed the deer population so that it would not exceed the carrying capacity of the land (88%). Woodland protection (77%) was also a key reason.
 - Virtually all landholdings (99%) said they used shooting as a form of deer management. 70% used fencing, and 31% used supplementary feeding.
 - At least 90% of primary suppliers of equipment, rifles, vehicles, etc to the deer management sector were located in Scotland.
-

Summary of economic impacts:

- We have used results from PACEC's research on the economic impact of shooting in the UK and the volume and value of country sports tourism to Scotland to estimate the total economic impact of deer management in Scotland, including supply chain effects and expenditure by stalking participants on other attractions while visiting Scotland

From respondents to survey

- The total expenditure on deer management in Scotland in 2013/14, according to the survey respondents, was £43.1m: £7.7m capital expenditure, £15.2m on staff, and £20.2m other operational expenditure (rounded to nearest £100k). This was partially offset by £12.5m in income from deer management.
- There were a total of 2,532 jobs in deer management in Scotland, of which 1,372 were known to be paid and 966 unpaid. As many of these jobs are part-time and/or seasonal, the full-time equivalent of this employment is 845 FTEs (722 paid, 124 unpaid).

From wider research

- PACEC's other research on shooting sports and Scottish country sports tourism suggests that the total impact of deer management on the Scottish economy, including associated hospitality, and the supply chain within Scotland, is £140.8m of total expenditure, supporting 2,520 FTE paid jobs in Scotland. These figures are consistent with the results of this deer sector research.

The bottom line:

- £140.8m of expenditure in Scotland is reliant upon Deer Management
- Of which, £43.1m is **directly** due to Deer Management activities as reported by the new survey
- £97.7m results from associated expenditure, largely by participants away from the stalking site (£55.6m)

This summary is available to download from the ADMG website: <http://www.deer-management.co.uk/>