



SURVEY TO ASSESS THE IMPACT OF THE LOSS OF LET STALKING AND DISRUPTION TO THE FOOD SUPPLY CHAIN ON DEER CULLING INTENTION

1. Introduction

The survey by ADMG, LDNS and the Scottish Venison Association conducted during May 2020 was undertaken to gain insight from the producers (stalkers, estate owners, land managers) on two connected issues arising from the COVID-19 crisis.

We wanted to establish what impact the lockdown, and likely pursuant, ongoing restrictions will have on stalking lets, whether this would mean that cull targets would be compromised, and what impact this would have on the revenue streams of rural enterprises of all sizes.

We asked these questions specifically in relation to red stags, hinds, and roe bucks and does. Whilst we did not include fallow and sika, we recognise the importance of these species particularly on a local basis.

Regarding venison, we wanted to know whether a reduction in let stalking would affect volumes of product entering the food chain, and if so what scale that reduction might take.

Recognising also that game dealer/processor businesses have been under pressure through lockdown and will continue to be as they attempt to return to some normality whilst exercising social distancing rules within their premises, we wanted to know what producers might be thinking if restricted dealer/processor capacity interrupts that route to market and what alternatives in terms of carcass disposal they might be considering.

We also wanted to know whether Government support schemes were being accessed by upland and lowland deer management businesses and whether they were successful in gaining support funding.

We asked for any additional comment on all the points above, and on concerns in general and respondents expressed a wide range of views, highlighting the consequences of the crisis on their businesses, and professional and/or vocational deer management activities. We did not ask specifically about the threat to rural jobs but unprompted comment was expressed about likely loss of full-time and part-time/seasonal jobs within the sector.

There were 104 survey responses of which 103 have been used. Total hectareage over which deer are managed covered by the survey is 800,000 ha.

2. Main conclusions

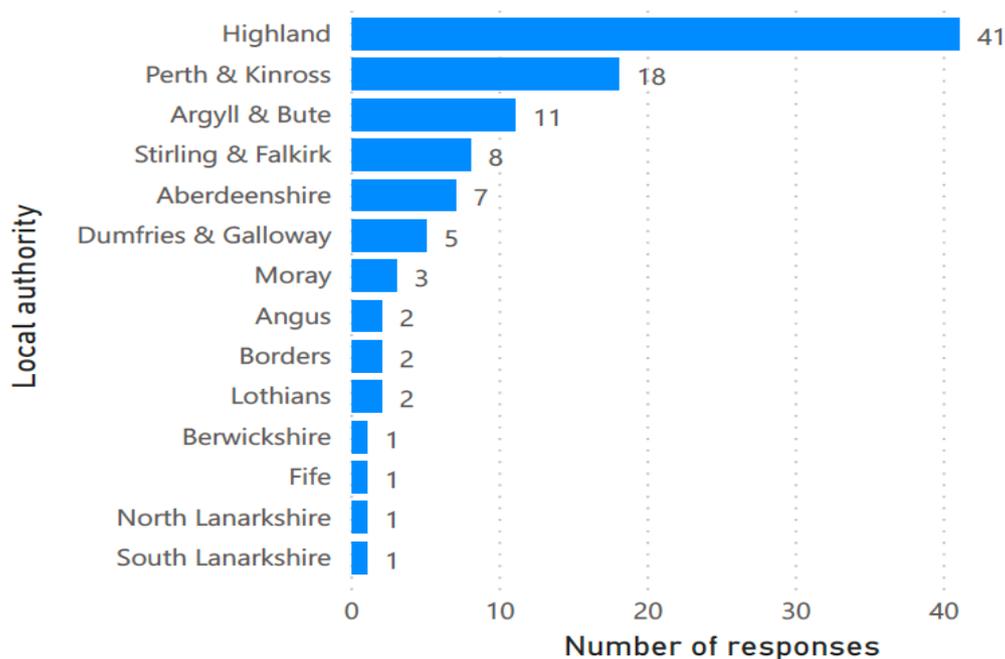
- The total amount of revenue estimated at risk of loss to respondents (103) if there is no let stalking this season is in excess of £2,500,000.
- However, if there is **no or limited let stalking** this year the deer cull plans of 59 respondents (57% of respondents covering 448,000 ha) would be **unaffected**.
- 51% (53 respondents) of all respondents said that the **loss of all or part of their letting income** would **not** affect the volume of venison put into the food chain.
- 62% (64 respondents) said that if arrangements with their game dealer/venison market change they would adjust their planned cull.
- Only 25% (26 respondents covering 197,000 ha) said that their cull would be **unaffected** by both loss of let stalking and by changes to game dealer arrangements.

3. Area of survey

Survey responses were received from 104 land managers/land holdings, upland and lowland, public and private sector. Forestry & Land Scotland (FLS) data, whilst submitted for 'all Scotland', has been excluded as it would significantly bias upward and median assessments.

The survey covered the following areas with responses for each area as follows:

Figure 1.



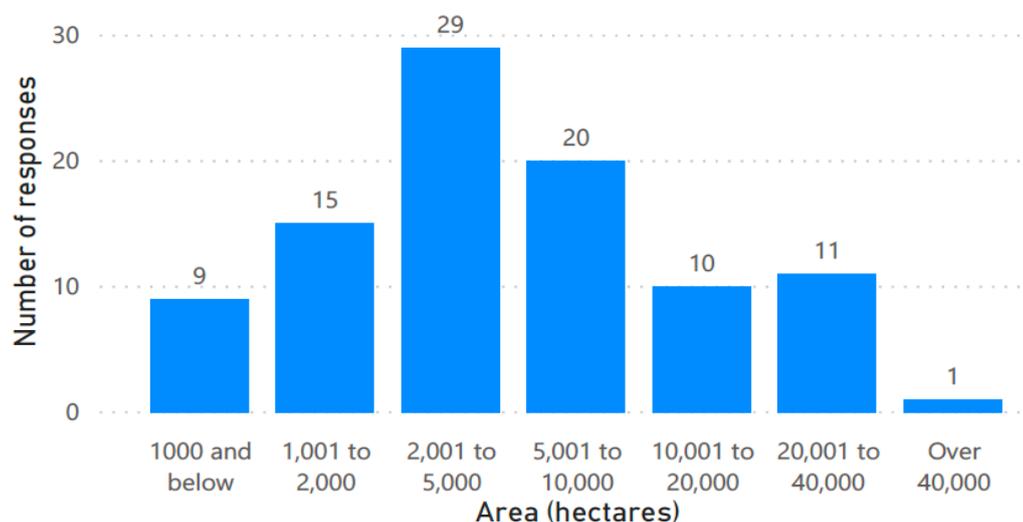
Respondents can be broadly split 75 upland, 28 lowland. Some respondents covered both red and roe.

4. **Response by area of landholding**

95 respondents gave the area over which they managed deer, both red and roe. Areas given ranged from < 1,000 ha to > 40,000 ha.

Figure 2.

Responses by area of landholding (95)



5. **Total planned cull without disruption**

Without disruption from COVID-19 crisis the survey showed that the respondents' target cull for the current/coming season would be as follows:

- Stags 5,199 (92 positive respondents)
- Hinds 7,675 (91)
- Bucks 1,607 (64)
- Does 1,940 (61)

6. **Effect of no or limited let stalking on the deer cull plan**

Overall the survey established that if let stalking is not possible or is limited due to the crisis:

- 57% (448,000 ha) said that their deer cull plan would be unaffected
- 43% (352,000 ha) said that their deer cull plan would be affected

7. **Loss of revenue from no or reduced let stalking**

The total amount of revenue estimated at risk of loss is £2,500,000.

The total estimated revenue at risk of loss by species/sex is as follows:

Stags

- Total estimated loss to respondents £1.77m
- Maximum single loss £280,000
- Median loss £11,000

Hinds

- Total loss £495,930
- Max single loss £123,700
- Median loss £2,500

Bucks

- Total loss £172,700
- Max single loss £36,400
- Median loss £2,000

Does

- Total loss £66,000
- Max single loss £15,000
- Median loss £1,000

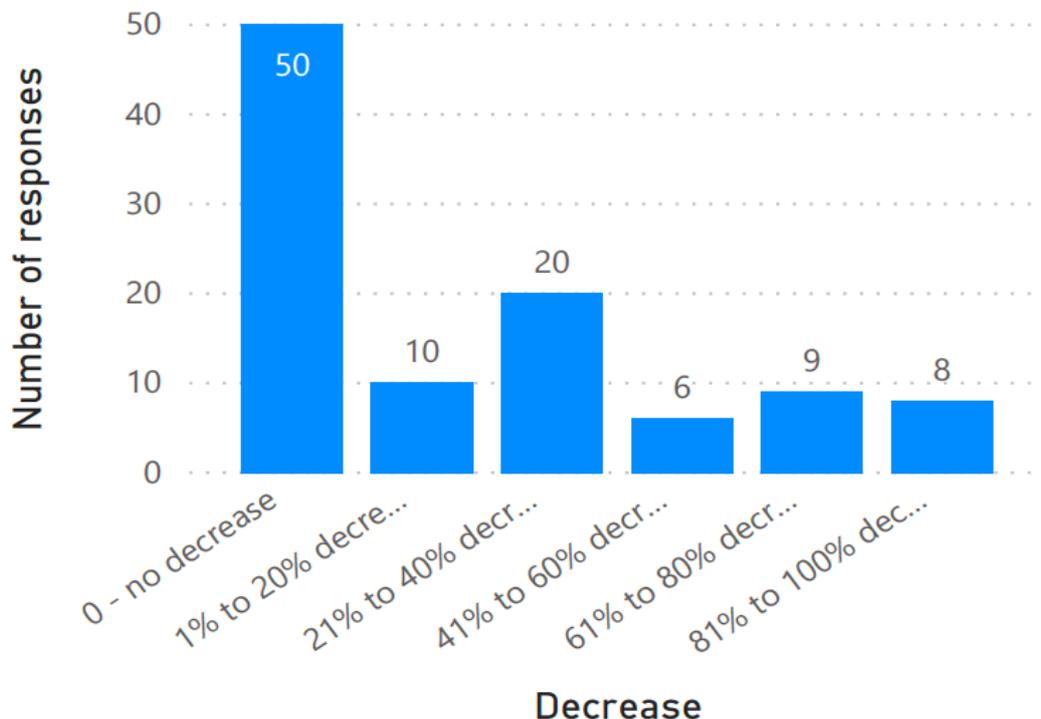
Comments show that a proportion of income lost for stags and hinds particularly would be from the letting of accommodation/lodges.

8. **Loss of let stalking and interruption of venison into the food chain**

- 51% (53 respondents) of all respondents said that the loss of all or part of their letting income would not affect the volume of venison they put into the food chain.
- 49% (50 respondents) of all respondents said that it would affect their venison output to some degree.

Figure 3.

Number of respondents indicating a % decrease in the number of carcasses supplied into venison food chain with no or reduced let stalking



9. **Game dealer processor arrangements**

We asked with a multiple choice question what respondents would do if arrangements with their current game dealer/processor changed (i.e. no or restricted collections, significant changes to price, or other changes). Respondents were able to select more than one answer.

- 64 said that if arrangements with their game dealer changed etc they would adjust their planned cull
- 62 said that they would explore other routes to market
- 15 said this would not affect them
- 14 said they would consider leaving carcasses on the hill.

We can deduce from this that if there is no let stalking and there are changes to arrangements with game dealers/processors, only 26 respondents (25% of all respondents; 197,000 ha from 24 replies) said that their cull would be unaffected, covering 1,061 stags, 1,995 hinds, 202 bucks and 259 does.

10. **Government support and grants**

- 68% had not applied for Government support
- 11% had applied for a grant
- 3% had applied for a grant and a loan
- 18% had not applied for support yet but said that they probably would apply
- No one had applied for just a loan.

Of the applications made for support

- 7 had been successful
- 2 had been unsuccessful
- 5 had not had a response yet

11. **Impact on jobs**

Whilst no specific question was asked on the impact on jobs there were a number of responses highlighting likely job losses. See Appendix 1.3

Survey undertaken by **Playfair Walker**

Business Strategy, Marketing and PR Consultants

For Association of Deer Management Groups (ADMG), Scottish Venison Association (SVA), and Lowland Deer Network Scotland (LDNS)

May 2020

www.playfairwalker.com

Appendix: comments from respondents

The following comments have been selected from those in responses to the survey and have been marshalled under appropriate headings.

1.1 Comments on reduction in cull if there is no income from let stalking

- There would be no cull without guest stalking
- Reduced amount would be shot
- Cull targets would not be met
- I will shoot a greatly reduced number
- Unrealistic to expect deer managers to cull as hard if letting income is zero
- We would carry out a rather smaller cull
- We would perhaps only cull a percentage of the stags but keep up the hind cull
- Without the help of guests I will be unable to complete my usual cull

1.2 Comments on maintaining cull if no income from let stalking

- The cull will continue to be taken as per our DMP
- The cull will be completed in house
- There will be no effect
- Cull maintained, unless there is no market for venison
- We will do it ourselves
- I will carry out the cull on my own, unpaid
- All our stalking is done in house.

1.3 Financial consequences and jobs

- Our biggest financial loss would be letting for lodges – 2 months letting for 2 lodges
- Letting income includes the rental of properties
- Restrictions will contribute significantly to the financial strain on the estate
- Would be a net loss on the shoot account
- A large financial loss is likely
- Stag letting helps to pay for a ghillie
- No income to pay for a seasonal ghillie
- Lower income would mean fewer employed by the estate as ghillies
- We could not employ the staff required to fulfil the cull
- Would probably make the stalker redundant
- Staff are being redeployed to other jobs
- Ghillie will be employed part-time rather than full season
- Not planning to take on our seasonal ghillie
- We have one full time stalker furloughed
- Two part-time stalkers have no employment
- As we let accommodation too there will be an impact on domestic staff
- One part-time stalker and ghillie will not be employed this season
- 4 sub-contractors will not be taken on this year
- Five full-time keepers have been furloughed and will need to look at the employment of our deer management staff
- This could ultimately lead to the loss of 2 and perhaps 3 jobs within our organisation
- We support 11 persons financially from stalking, culling and venison – without paying stalking clients etc there is no business to support these people
- May use seasonal/self-employed stalkers
- We may consider a contract stalker

1.4 **Game dealers, the venison market and supply chain**

- We need to understand ongoing dealer capacity
- If we cannot dispose of our carcasses then our cull would be reduced
- We have no idea what the market for our venison will be
- I would not cull unless I can sell my carcasses
- Even prior to lockdown finding a dealer to take carcasses was extremely difficult
- Venison market is key
- Game dealers not operating would have an impact on culls
- If I cannot sell the bulk of my venison there is no point in shooting beasts
- Its dependent on when COVID restrictions are removed and game dealers re-open
- Normal cull assumes the dealer will collect carcasses
- Will only cull if I can properly dispose of carcasses into the food chain
- A functioning venison market is vital – if not then cull plans will be drastically affected
- Venison sector will be unable to sell venison

1.5 **Other arrangements for venison**

- Most venison is used by ourselves, friends and family
- We don't sell much to dealers
- Some carcasses are for home use
- We will definitely be direct marketing venison if dealer price predictions are correct
- We have been able to sell butchered carcasses locally and fill the freezer
- Roe carcasses are sold easily to third parties
- We are likely to donate venison to local food banks
- We are Investigating other routes to market to avoid reliance on dealers

- The game dealer has not yet paid fully for last year's carcasses and has dropped the price
- Prior to Covid dealers were refusing to take carcasses or offering next to nothing for them

- If there is no market I have no intention of shooting and dumping venison
- It is the state of the venison market that will determine whether we can deliver the level of cull

1.6 **Financial support**

- Sporting rates should be waived 100%

Eligibility for support

- We are not eligible
- It may not be worth it
- The grant application was extremely complex
- We are likely to be ineligible
- I do not think I am eligible
- I have never taken a Government hand out!
- We are not eligible for support
- We need clarification on support available, and am surprised that the grant based on rateable value is not available to deer larders
- We are not eligible for any of the scheme
- Many deer forests will not qualify for support and are disadvantaged compared to other businesses

1.7 **Leaving deer on the hill**

- I will not just cull deer and leave them on the hill
- To cull and leave carcasses on the hill or in the forest is not an option and catastrophic for the industry

1.8 **Other relevant comments**

- If we can't deliver the cull at no net cost we will have to charge for the service
- Government should consider paying for a disposal scheme
- We need clear guidance about support measures for land managers in COVID-19 scenarios
- We need support for the provision of larders and a dealer network willing to take carcasses

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