

Deer, Employment and Tourism Scoping Study

A report

for

The Deer Commission

by

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Scoping Study

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Executive Summary

General

E1 The key objectives of this research project were:

Direct Employment in Wild Deer Management

- Report on previous and current published information on employment in deer management (numbers, character, geographic distribution);
- Provide a thorough analysis of the nature of direct employment in deer management from on-site employment up to the point of carcass sale or consumption, including indirect on-site activities such as fencing;
- Analyse the character of employment (full or part-time, wages, skill levels, training and qualifications, labour market);
- Assess trends, and current and future capacity of the sector.

Deer and Tourism

- Identify direct contributions to tourism other than stalking (eg. antler and deer hide crafts, wildlife photography); and indirect contributions (eg. through the “Highland Brand” image); using any existing sources of data to quantify these;
- Evaluate the positive and negative aspects of the “Monarch of the Glen” icon;
- Identify other significant tourism interests (eg. hill-walking, climbing) which may conflict with wild deer management and collate information on the worth (in financial and employment terms) of these interests.

E2 The work programme for the project included:

Direct Employment in Wild Deer Management

- A literature search and review (including a review of the University of Aberdeen library catalogue and a Web search);
- Discussions with Deer Commission for Scotland staff;
- Discussions with representatives of key organisations (including the Association of Deer Management Groups, the British Deer Society and the British Association for Shooting and Conservation);
- A review of shooting and country life magazines to identify deer industry suppliers;
- Discussions with a range of deer industry suppliers and other associated businesses (eg. gun and rod shops, helicopter hire companies, venison dealers, and sport letting agents);
- Contacts with colleges providing training courses with a deer management element;
- Discussions with staff from other relevant organisations, such as Highlands and Islands Enterprise and Made in Scotland;
- Discussions with a number of craft workers who use deer by-products.

Deer and Tourism

- A literature search and review focusing on the role of deer in Scottish tourism;
- A review of current Scottish tourism brochures to explore the frequency and nature of the use of deer images;
- A review and analysis of deer image use by postcard manufacturers and crafts producers;
- A review of other, non-tourism uses of deer imagery (eg. by the manufacturers of products such as cars and furniture);
- A review of relevant tourism research reports and statistics;
- Discussions with Scottish Tourist Board and Scottish Natural Heritage staff;
- A limited search of shops in Inverness and Edinburgh for crafts and giftware products using deer images.

Employment in Wild Deer Management

E3 There is a range of literature on employment in wild deer management and the broader economic impact of sporting shooting. Key studies include:

- The Red Deer Industry - Finance and Employment (1978/9) - Elizabeth Jarvie (1979);
- The Management of Wild Deer in Scotland - Robin Callander and Neil MacKenzie (1991);
- The Economic Impact of Sporting Shooting in Scotland - Fraser of Allander Institute (1990);
- Sporting Shooting in Scotland - Segal Quince Wicksteed (1995).

E4 Most of the hard statistical evidence on deer-related employment that we have accessed for this study (ie survey-based) is well out-of-date, and often relates only to red deer (or to the wider sporting shooting “industry”).

E5 Our review suggests that there have been important changes since Elizabeth Jarvie’s report (the most exhaustive undertaken to date) on employment in the red deer industry, which related to 1978/79. More recent employment estimates appear to us to be unreliable as they are based on extrapolations from relatively small numbers of estates, etc, that may not be typical, and as the conversion of temporary or part-time/seasonal jobs to full-time equivalents (fte’s) is likely to be inaccurate.

E6 The key points relating to deer-related employment from this scoping study are as follows:

- There have been increases in deer numbers across all species, and increases in annual culls. These trends are expected to continue, creating scope for increased employment opportunities throughout the deer industry;
- Deer shooting is still the main source of employment in the industry, including stalking, culling to improve management, and control to allow increasing afforestation in Scotland in the context of expanding deer ranges;
- In terms of fte jobs, other important sectors include venison production, deer fencing, and accommodation of stalking visitors;

- In total, our research has identified a minimum of **850** estimated fte jobs. A full analysis could derive a total of at least **1,000 fte's**, and possibly a total closer to **1,500 fte's**;
- The price of sterling against other relevant currencies is likely to remain high, creating difficulties for venison exporters and keeping down the price received by estates;
- Part-time employment in deer management is an increasing feature, but where this is supplemented with other estate work (some bird shooting and preparatory work, maintenance, public access management, etc) this can help towards sustaining a full-time living, keeping facilities in relatively remote rural areas to the benefit of fragile local communities;
- Jobs are primarily male, which is useful in complementing female jobs in tourism, compensating for secular decline in agricultural employment, and helping to reduce male unemployment (which tends to be higher than female unemployment throughout Scotland);
- Deer-related craft work has reduced in importance, but craft workers can often switch to other icons or raw materials to sustain their employment;
- There is scope to promote deer stalking as a niche tourism market through a co-ordinated approach;
- There is scope to build up domestic markets for venison as a healthy meat through generic marketing and improved quality control;
- Jobs are distributed throughout most of rural and upland Scotland, but with relative concentrations in the traditional red deer stalking areas (where this employment is particularly valuable);
- There is increasing appreciation of the role of deer management in promoting biodiversity, but funding to realise potential related employment opportunities tends to be lacking. Relatively little work is undertaken by individual estates in range management as the deer are not owned;
- Sustainable management practice can be built into grant awards (eg, through the Woodland Grant Scheme), but enforcement can be difficult if the landowner or tenant cannot afford to carry out the required work.

Deer and Tourism

E7 The main conclusions to be drawn from our review of deer and tourism can be summarised as follows:

- There are strong links between deer and tourism, but it is difficult to quantify the scope and scale of these links;
- Deer stalking constitutes a significant tourism niche market;
- Deer by-products are used by crafts producers to manufacture goods (eg. walking sticks) sold to tourists;
- Deer are the subject matter of a range of goods (eg. postcards, posters, books, and figurines) sold to tourist visitors;
- Deer images are used in a range of material promoting tourism in Scotland (eg. Scottish Tourist Board brochures, and estate leaflets). It is important to note that deer are not an exclusively Scottish icon (eg. the icon of a leaping red deer is using by a range of organisations including Hertfordshire County Council and the House of Fraser department store group);

- Deer images are also associated with other Scottish icons such as whisky and the Clan system;
- Deer images, while prevalent in a range of formats, are not the most popular Scottish icons with visitors. The most popular icons include: Castles, Highland cattle, Nessie, Golf courses/golfers and Whisky;
- The “Monarch of the Glen” icon still has a strength (which may be bolstered by the current BBC television series of the same name), although the image is probably a historic one, which is fading in significance.

E8 The principal positive and negative aspects of the “**Monarch of the Glen**” icon are:

<i>Positive Aspects</i>	<i>Negative Aspects</i>
<ul style="list-style-type: none"> • Represents tradition; • Strong image; • Well known image (but fading awareness amongst younger age groups?) • Image widely reproduced and referred to. 	<ul style="list-style-type: none"> • Old fashioned, 19th century image; • Rarity value is being diminished by increasing deer numbers; • Associated with aristocratic and other large scale land owners; • Only relates to red deer stags (does not help to raise awareness and understanding of other deer species.)

Recommendations

- E9 In the report recommendations are made on how to obtain a more complete, robust and up-to-date analysis of deer-related employment in Scotland, encompassing all deer species and covering the whole of Scotland.
- E10 Recommendations are also made in relation to potential Deer Commission for Scotland involvement in the marketing of deer shooting and in reviewing the wild venison market in the UK.