

CHAPTER 1

INTRODUCTION – THE OBJECTIVES & SCOPE OF THE STUDY

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1. INTRODUCTION – THE OBJECTIVES & SCOPE OF THE STUDY

Objectives

- 1.1** This Part Two Report provides the inventories prepared for 7 countryside-based tourism, recreation and sports activities. It also includes the results of surveys conducted into the main trade and service organisations associated with the 5 main countryside sports. These inventories form part of the results of a Study commissioned by the Borders Foundation for Rural Sustainability into the nature, size and structure of the ‘Countryside Management Industry’ in the Borders Region. This Region covers the area for which the Scottish Borders Council has statutory responsibility.
- 1.2** The Report purposely excludes reference to farming activities, which were covered in the Part One Report. Specifically the latter focused on the results of surveys into ‘on’- and ‘off’-farm diversification.
- 1.3** The 7 countryside-based tourism, recreation and sports activities covered in this Report are as follows:
- ❑ Countryside and farm-based tourism and recreation;
 - ❑ Angling
 - ❑ Lowland Game Shooting
 - ❑ Grouse Shooting
 - ❑ Deer Stalking
 - ❑ Fox Hunting
 - ❑ Falconry
- These activities were perceived as both potential additions and, possibly in some cases, alternatives to farming and forestry. Thus, at least in part, they represent some of the diversification options
- 1.4** The surveys, undertaken in compiling the inventories, were designed to obtain data from all of the key local stakeholders responsible respectively for providing and participating in these activities. Thus the survey populations variously covered landowners, agents, factors, the managers of countryside-based tourism and recreation facilities and businesses, and the officials and members of the principal field sports organisations.
- 1.5** The prime function of the surveys, as commissioned by BFRS, was to:
- ❑ provide both the rural community and decision-makers with reliable information about aspects of the countryside in the Scottish Borders which had not been previously or thoroughly researched
 - ❑ inform public debate relating generally to countryside issues and, in particular to farm diversification;

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- ❑ assist those interested either in extending their diversification activities or in embarking upon diversification for the first time;
 - ❑ serve as a reference base for future monitoring and evaluation of natural resource-based activities throughout the Region
 - ❑ provide a ‘base-line’ of inventories to be used in selecting potentially the most promising activities for which technical and financial profiles need to be developed. The development of such profiles is seen as the logical extension to the Study. It is envisaged that, resulting from research into a range of diversification enterprises, they will prove helpful to local farmers, landowners, entrepreneurs and trainees in providing business development guidelines.

Scope

- 1.6** As a technical reference document, this Report is inevitably long, even when the detailed survey forms and spreadsheets covering the survey results are assigned to separate **Appendix documents** due to be published subsequently. Few readers may wish to read this document in its entirety. A separate **Part Three Report**, however, specifically provides both highlights of the survey results and potential ‘direction signals’ for future diversification initiatives.
- 1.7** Against this background, readers may find it helpful to refer to **Box 1.1** as quick means of identifying the appropriate inventory. In that way, they should be able to access the required information quickly.

BOX 1.1: PART TWO REPORT REFERENCE LIST	
CHAPTER Number and Topic	BROAD CONTENTS
2. Methodology	A brief description of the non-farming, land-based activities for which inventories were prepared as part of the Study. Most importantly, a summary account is provided of the methodology adopted in conducting the surveys upon which the inventories were based
3. Countryside-based Tourism, Recreation & Sports	The surveys and results of Rural Tourism operators are described. When combined with the results of research conducted by the Scottish Borders Tourist Board, a total inventory for the sector is provided.
4. Angling	The results of primary research conducted in the case of Angling Providers are presented. When analysed and combined with earlier research conducted by Deloitte Touche (1996), total estimates of direct expenditure and employment estimates are derived for the activity. Estimates of both indirect and induced impacts are also presented as part of the overall inventory.
5. Lowland Game Shooting	The methodologies adopted for first-time primary research into lowland game shooting activities, prior to presentation of estimates of the direct and indirect economic impacts and the results
6. Grouse Shooting	Similar methodologies were adopted, in order to estimate the expenditure and employment impacts of grouse shooting activities. The results of independent surveys, covering the providers of grouse shooting respectively in the Lammermuirs and the Southern Uplands, are presented.
7. Deer Stalking	The results obtained from the surveys, conducted into the activities of deer stalking providers and participants, are summarised. They called for supplementary investigations in the interests of verification and aggregation exercises. The results obtained involved the inputs of a panel of local experts and are presented in the second part of the Chapter.
8. Fox Hunting	The results of a census of Fox Hunting providers and participants are summarised. They relate specifically to the activities of 7 Hunts in so far as they took place in the Borders. They provide much more detailed information than that resulting from the earlier pilot study conducted by Produce Studies Ltd.
9. Falconry	Surveys were conducted into this minority sport, covering both the activities of DIY falconers and spectators involved in visiting Falconry Centres.
10. Allied Trades and Service Organisations	Descriptions are provided of the methods and results of surveys, which were conducted into the extents to which allied trades and services were dependent upon the countryside-based activities under investigation (other than rural tourism)

The Team

- 1.8** The membership of the Scott Wilson Resource Consultants and Scottish Agricultural College consultancy team, involved in undertaking these surveys and preparing the inventories, is provided in the initial section of this Report. This is accompanied by a list of the main experts, including BFRS members, who were consulted and whose inputs formed an invaluable contribution to the inventories. Their names are also listed at the end of each Chapter.

- 1.9** Particular mention must also be made of the essential contribution made by the independent Statistical Adviser as part of the consultancy team.