

CHAPTER 10

INVENTORIES OF TRADE & SERVICE ORGANISATIONS SUPPORTED BY COUNTRYSIDE SPORTS ACTIVITIES IN THE SCOTTISH BORDERS

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10. INVENTORIES OF TRADE & SERVICE ORGANISATIONS SUPPORTED BY COUNTRYSIDE SPORTS ACTIVITIES IN THE SCOTTISH BORDERS

Summary of Main Survey Findings

The findings presented in this Chapter were the result of first-time primary research. This covered investigations using a combination of questionnaires and telephone surveys into the extent of dependence of trade and service organisations upon the activities of countryside sports' providers and participants. More particularly the surveys sought to determine how the levels and timing of the annual expenditures impacted upon the viability of the firms.

The principal findings in the case of the three 'core' sports are presented below.

Angling

Number of Goods/Services & Organisations

- The number of generic goods and services that needed to be purchased was **fewer than for game shooting and fox hunting**
- Only 14 specialist firms, providing specialist angling goods and services, were identified. Compared with shooting and hunting, angling involved much higher proportions of purchases through general stores, such as supermarkets.

Levels of Trade & Employment

- Both the levels of trade turnover and employment revealed by the survey was modest. This stemmed from the fact that a substantial proportion of the estimated annual off-site spend by anglers (£5.1 million) was made through general traders and service providers, such as garages, supermarkets and B & B establishments
- The total off-site expenditure by Providers and Participants was estimated to have supported employment amounting to between **67 and 68 FTEs**

Shooting

Numbers of Goods/Services & Organisations

- For shooting, between **21 and 23 different categories of inputs** were found to have been purchased by Providers and Participants

- The types of organisations which received the most frequent ‘patronage’ by both Providers and Participants were suppliers of:
 - **Ammunition**
 - **Veterinary Services and Medications**
 - **Game Feed and Game Poults**
 - **Dog Feed**
 - **Gun/Rifle Maintenance and Repairs**
 - **Vehicle Fuel**
 - **Clothing**
- **205 local firms** had been involved in servicing shooting Providers and Participants in 1999, plus **a further 80 businesses operating from locations outside** the Scottish Borders Region

Levels of Trade & Employment

- The **direct expenditure made through trade and service organisations** collectively by Providers and Participants was estimated to have totalled **£5.8million** in 1998/99. The **numbers of jobs associated** with these direct trade purchases were between **325 and 510, representing 65 to 102 FTEs**

Vulnerability

- The businesses of **12 of 27 (44%) of the key trade organisations** were found to be **at risk**, in the event of a significant downturn in game shooting activity; for example, as the result of a ban. **75% of those firms** indicated that in such an event they **would seek compensation**. In the case of these businesses, **some 40 jobs (22 FTEs)** were identified as being at risk
- The **most vulnerable businesses** were identified as being those involved in supplying **game poults and feed, shotguns and rifles, specialist clothing and repair services**
- The trade sector involved in the **collection, storage and processing of game** was found to have been particularly vulnerable to change (**over 50% having closed in recent years due to a combination of intense European competition, regulations and foreign exchange rates**)

Fox Hunting

Numbers of Goods/Services & Organisations

- **34 different generic types of trades and services** were identified
- The Mounted Subscriber Followers of the Borders Hunts were serviced by **over 1,000 of businesses**. Approximately **650 were locally based**, with a further **400 firms having operated from locations outside** the Region

- The principal types of trade and service organisations were those providing:
 - **Equine health care (Vets, dentists and medication suppliers)**
 - **Feed**
 - **Saddlery Repairs**
 - **Farriery Services**
 - **Fuel Supply**
 - **Clothing**
 - **Vehicle Servicing**
 - **New Tack Supplies**

Levels of Trade & Employment

- The **local trade purchases made by Providers and Participants** were estimated to have totalled between **£1.9million and £2.45million**. The **employment generated** by this direct expenditure was estimated to have been between **44 and 54 jobs**. These represented **30 to 39 FTEs**

Vulnerability

- The telephone surveys of the **54 organisations** identified as having had the highest number of hunting customers and associated turnovers, revealed that in the event of a ban:
 - **over 25%** considered that their businesses would either be **“devastated” or “seriously at risk”**
 - for those there could be losses of **21 jobs (15 to 16 FTEs)**
- The trade and service **organisations most at risk** were identified as being:
 - **Livery Yards** (with 25% to 100% of the turnovers being susceptible)
 - **Farriers** (with between 33% and 80% of their turnovers vulnerable)
 - **Clothing and Saddlery Repair firms**
- The impacts upon those organisations was identified as being significantly **concentrated in the winter months**

Overview of All Three Countryside Sports

- The overview, covering **all three countryside sports**, revealed that:
 - **35 local trade organisations** were very highly dependent on the sports
 - The employment sustained by those high risk businesses amounted to between **100 and 200 local jobs**, representing **over 50 FTEs**.

10. INVENTORIES OF TRADE & SERVICE ORGANISATIONS SUPPORTED BY COUNTRYSIDE SPORTS ACTIVITIES IN THE SCOTTISH BORDERS

Introduction

- 10.1** This Chapter describes the surveys undertaken to determine the extent of any commercial dependence of key local trades and service organisations upon customers/clients, involved as the Providers and/or Participants of countryside sports.
- 10.2** From the outset of the Study it was considered that the results of the surveys would be important in assisting the planning and implementation of sustainable development strategies for the Region and, in particular, its rural sector.

Methodology

- 10.3** The postal questionnaire surveys conducted, in the case of shooting and hunting, contained questions designed to identify both the main local ('internal') and 'external' (i.e. located outside of the Region) organisations from whom products and services had been purchased for specific sporting purposes during the 1998/99 season.
- 10.4** The results were analysed to:
- determine those that were most frequently 'patronised' (i.e. received the highest numbers of citations); and
 - estimate the total annual expenditures involved (i.e. the amounts spent by the respondent Providers and Participants through each of the local organisations) and the levels of employment generated/sustained.
- 10.5** The Proprietors of 'key' organisations identified by this means were then asked by letter (**ref Appendix 10.1**) to participate in a telephone survey. They were subsequently contacted by the consultants and asked to provide the information outlined in the letter.
- 10.6** In the case of angling, no specific survey of Participants was conducted since this had previously been undertaken by Deloitte Touche. However, the survey conducted by DLT did not provide insights into the impacts of angling upon trades and service organisations in the Borders. Consequently a different approach had to be adopted to obtain indicative estimates. This entailed compiling, with the assistance of BFRS and other local experts, a list of the main 'internal' organisations known to service both angling Providers and Participants. The Proprietors were invited by letter to participate in the type of telephone survey described above in the case of shooting and hunting.

Angling Survey Results

Identification of Main Organisations

- 10.7** Through liaison with BFRS and other consultees, 14 specialist firms, involved in providing angling goods and services, were identified. In comparison with the array of specialist organisations servicing shooting and hunting, the number was small. This stemmed from the fact that significantly fewer generic goods and services need to be purchased in the case of angling.
- 10.8** The main specialist organisations were tackle and clothing retailers and taxidermists. In terms of other inputs, such as vehicles, fuel, insurance, it was found – as in the case of shooting and hunting – that no major or dominant suppliers existed. No specialist angling tackle or clothing manufacturers were found to exist in the Borders; likewise no angling journals or press activities were based there. However, like shooting, specialist firms were also identified as being involved in processing the produce of the sport, i.e. some of the ‘catch’.

Telephone Survey Results: Proprietors

- 10.9** The results of the telephone survey of local Angling Trades’ Proprietors, summarised in **Box 10.1**, were relatively modest. This related to the fact that a substantial proportion of the total expenditure of Providers and Participants was made through general traders, such as garages, super-markets etc.

BOX 10.1: SUMMARY ASSESSMENT OF THE BUSINESS OF SPECIALIST TRADES AND SERVICE ORGANISATIONS DERIVED FROM THE ACTIVITIES OF ANGLING PROVIDERS AND PARTICIPANTS IN BORDERS REGION			
TYPE OF ORGANISATION	ESTIMATED NO. OF CUSTOMERS/ CLIENTS	ESTIMATED ANNUAL TURNOVER OF ANGLING PRODUCTS/SERVICES	ESTIMATED LEVEL OF EMPLOYMENT SUPPORTED
	No.	£	FTEs
RODS, TACKLE & ANGLING CLOTHING RETAILERS 4 No.	4,560	450,000	4.1
TAXIDERMISTS 2 No.	N/A very variable *	8,000 to 10,000	0.5
FISH PROCESSORS 2 No.	500 to 1,000	220,000	4.5

- * These tended to be ‘one-off’ clients involved in a once in a lifetime purchase. Clients were broadly located, approximately 30% being based in the Borders with the remainder coming from the UK, Europe and the USA. The taxidermists’ business related to more than one sport. On average, 20% of

their turnovers related to angling. The estimates provided in **Box 10.1** refer solely to angling.

10.10 Some particularly interesting insights emerged from the survey, in that four of the organisations on the list were found to have ceased trading either completely or specifically in relation to the provision of angling products and services; one through the death of the Proprietor, the others through closure or amalgamation. More closures were predicted on account of:

- the duplication of services;
- the expansion in purchases made from central UK warehouses through mail order businesses;
- the general recession reported amongst the retail trade in Scotland;
- price competition from abroad due to the strength of sterling, leading to minimal or zero profit margins.

The last of the four reasons was mentioned more than once.

10.11 In Chapter 4, covering the inventory of angling activities, the total estimated Indirect Employment supported through the “Off-Site” spends of angling Providers and Participants was reported as having been between 67 and 68 FTE Jobs in 1998/99 (**ref: Box 4.19**). Because of the relatively low level of purchases from specialist firms, the number of FTE jobs identified via the telephone survey (10.1 FTEs) was only about 15% of that total.

Shooting Survey Results

Survey Methodology

10.12 The Shooting Provider and Participant Questionnaires identified the names of the main trade organisations from which the respondents purchased goods and services, specifically relating to lowland game shooting. Based upon previous research undertaken by the consultants, the design of the survey questionnaires anticipated, in the case of the Providers, 23 different generic categories of trades and services. The surveys themselves confirmed that the Providers made purchases from 21 of them. In the case of the Participants, the corresponding number of categories was 23.

10.13 The questionnaires were analysed to determine:

- the frequency of individual trade and service ‘patronage’ by provider and participant respondents;
- the level of annual expenditure allocated to individual trades and services by provider and participant respondents.

Initial Survey Results

10.14 Analysis of the provider and participant questionnaires revealed that in 1998/99 large numbers of organisations were involved in meeting the needs of both the Shooting Providers and Participants. **Boxes 10.2** and **10.3** respectively summarise the results.

BOX 10.2: SUMMARY OF TRADE & SERVICE ORGANISATIONS PATRONISED BY THE SHOOTING PROVIDERS, OPERATING IN THE BORDERS REGION - 1998/99

The numbers are based upon the **57** responses received to a postal questionnaire sent in **March, 2000** to all **135 Main Providers of Lowland Game Shooting in Borders Region**

Type of Trade/Services	Number of Local Organisation *	Number of Citations: Local/Internal **	Number of Citations: External ***	Number of Citations: Grand Total
Shotguns and Rifles	4	17	4	21
Gun and Rifle Maintenance & Repairs	4	30	6	36
Ammunition: Cartridges & bullets	7	38	3	41
Veterinary Services & Medications	7	31	2	33
Dog Feed	11	31	0	31
Dog Purchase	2	3	2	5
Dog Training	2	4	1	5
Insurance	3	17	7	24
Security	1	3	0	3
Game Poults	5	19	11	30
Game Feed	11	26	5	31
Seed for Game Crops	9	25	2	27
Game Re-Stocking Equipment & Materials	5	17	1	18
Vehicle Fuel	17	29	2	31
Vehicle Maintenance	16	29	0	29
Food & Drink	10	21	2	23
Clothing	5	17	2	19
Gifts	2	3	0	3
Building Maintenance/Repairs	4	12	0	12
Shooting Journals	1	3	0	7
Professional Advice	6	6	7	13
TOTAL	132	381	57	438
% of Total		87	13	100

Footnotes

* The number of Local Firms/Businesses mentioned by the respondents

** The number of times that a Local Firm was mentioned by the respondents i.e. the number of respondents who were revealed by the survey as having patronised the firm in 1998/99

*** The number of times that a non-Borders firm was mentioned by the respondents i.e. the number of respondents who patronised an 'external' firm.

BOX 10.3: SUMMARY OF TRADE & SERVICE ORGANISATIONS “PATRONISED BY LOWLAND GAME SHOOTING PARTICIPANTS IN BORDERS REGION – 1998/99						
The numbers are based upon 80 responses to a postal questionnaire sent to 360 Lowland Game Shooting Participants in December, 1999						
Type of Trade / Service	Number of Organisations			Number of Citations by Shooting Organisation		
	Local	External	Grand Total	Local	External	Grand Total
Shotguns and Rifles	5	6	11	18	10	28
Gun and Rifle Maintenance & Repairs	3	8	11	33	11	44
Ammunition: Cartridges & bullets	15	9	24	58	14	72
Veterinary Services & Medications	9	5	14	47	5	52
Dog Feed	25	4	29	46	4	50
Dog Purchase	5	1	6	5	1	6
Dog Training	3	0	3	1	0	1
Insurance	6	15	21	12	29	41
Security	7	1	8	9	1	10
Game Poults	12	5	17	26	6	52
Game Feed	19	3	22	25	3	28
Seed for Game Crops	0	0	0	0	0	0
Game Re-stocking Equipment & Materials	0	0	0	0	0	0
Vehicle Fuel	22	6	28	36	7	43
Vehicle Maintenance	28	3	31	37	3	40
Food & Drink	23	5	28	29	6	35
Clothing	17	7	24	36	7	43
Gifts	5	2		8	2	10
Building Maintenance & Repairs	0	0		0	0	0
Shooting Journals	8	8	16	9	8	17
Professional Advice	0	0	0	0	0	0
Dog Kennels	6	2	8	13	2	15
Accommodation	4	2	6	4	3	7
TOTAL	222			446	122	568
%				78.5	21.5	100

10.15 Importantly, a distinction was made between locally based (‘internal’) firms and those that are ‘external’, i.e. located outside of the Borders and, indeed, outside of Scotland. This distinction is important in the context of subsequently identifying:

- ‘economic leakages’;
- possible avenues for diversification; and
- the growth of local businesses through possible adjustments to the purchasing habits/preferences of both the Providers and Participants.

- 10.16** Through the surveys, 354 organisations were identified. Some of these organisations ‘overlapped’ in that they were involved in servicing both Providers and Participants.
- 10.17** Regardless of the fact that the Participant respondents outnumbered their Provider counterparts, it was interesting that the lowland game shooting Participants needed to call upon a wider range of generic trades and service organisations (23 versus 21) than did the Providers. This is apparent from comparisons between **Boxes 10.2** and **10.3**.
- 10.18** In addition, for some of the generic trades and services, the Participants utilised the services of a larger number of organisations. This applied especially in the case of the following types of organisation: vehicle maintenance (21 more firms), food and drinks suppliers (18 more), dog feed suppliers (18 more), clothing shops (14 more), ammunition suppliers (12 more) and vehicle fuel stations (10 more).
- 10.19** The survey results revealed that overlaps also occurred, because some organisations provided more than one type of product or service. This applied particularly in the case of those involved in the sales of guns, ammunition, game equipment, clothing (plus or minus the provision of clay pigeon shooting facilities), the repair/maintenance of guns, and in both selling fuel and servicing vehicles. Overall, the overlaps related to about 42% of the local organisations.
- 10.20** However, even following adjustment for these ‘overlaps’, the total numbers of both ‘internal’ and ‘external’ organisations involved in servicing shooting providers and participants, were found to be large, namely **approximately 205 local firms plus more than a further 80, operating from ‘external’ locations**.
- 10.21** Further analysis revealed the names of the ‘top organisations’, in terms of those with the highest numbers of shooting customer citations and associated turnovers. In total, **27 such organisations**, covering many different categories of trades and services, were identified.
- 10.22** It was considered that a telephone survey of these organisations by broad categories would potentially yield some useful insights into the economic contributions of lowland game shooting. The identities of the individual organisations remain confidential, but the profile of the generic survey population is displayed in **Box 10.4**.
- 10.23** The survey was preceded by an explanatory letter, which was sent to the each of the proprietors (owners/managers/senior partners) of the organisations, inviting them to participate, outlining the purposes of the survey and giving prior notice of the topics that they would be requested to cover during the subsequent telephone conversation. A copy of the letter, together with the attached list of questions/discussion topics, is displayed in **Appendix 10.3**.

10.24 All of the organisations were telephoned. A response rate of **100%** was achieved.

Telephone Survey Results: Trade and Service Organisation Proprietors

10.25 This particular survey, like all of the other surveys undertaken as part of this project, was conducted impartially. The results are summarised in **Boxes 10.5** and **10.6**. They reveal how collectively the ‘top’ trade and service organisations, participating in the survey, reported their levels of dependence upon lowland game shooting clients with respect to turnover and employment.

BOX 10.4: NUMBERS OF MAIN TRADES & SERVICE ORGANISATIONS IN THE BORDERS REGION, FROM WHICH SHOOTING PROVIDERS & PARTICIPANTS MADE PURCHASES DURING THE 1998/99 SHOOTING SEASON

Category of Organisation	Number of Organisations mentioned by Respondents with 10 or more citations, involving significant expenditure by Shooting Providers & Participants
Shotguns & Rifles, Maintenance & Repair Services, Ammunition & (in some cases Game Equipment & provision of clay pigeon shooting)	4
Veterinary Services & Medications	4
General Suppliers: Dog Feed, Game Feed & (in some cases Clothing)	4
Insurance & Security	3
Game Poults & (Game Feed)	6
Fuel & Vehicle Maintenance	4
Specialist Clothing & (Gifts)	2
TOTAL	27*

* Of these organisations, 14 are involved in the provision of multiple products & services

10.26 In terms of vulnerability to possible changes to the game shooting environment, the following pointers emerged:

- ❑ **12 of the 27** organisations consulted (i.e. nearly 45%) considered that their businesses would either “be devastated” or “be seriously put at risk”;
- ❑ three quarters of organisations indicated that, in the event of a significant decline in shooting activities, they would need to seek compensation;
- ❑ the potential employment impacts could involve losses of **some 40 jobs (representing 22 FTEs)**;
- ❑ of all of the trades and services, those particularly susceptible appeared to be:

- suppliers of game poulters +/- game feed;
- suppliers of shot-guns and rifles, maintenance and repair services and ammunition;
- specialist clothing firms.

10.27 With regard to the last pointer, it was noted **between 55% and 70%** of the annual turnovers of the 4 Suppliers of Shot-Guns and Rifles, Maintenance & Repair Services and Ammunition consulted were said to be dependent upon lowland game shooting. The corresponding turnover estimates for the Suppliers of Game Poulters and Feed were between **75% and 90%**.

10.28 Virtually all of the proprietors of the most vulnerable businesses mentioned the need, in the event of a ban, to consider diversification and, in some cases, re-training. However, the prospects for diversification were not viewed as encouraging. Indeed, the prospects of change appear to be especially austere, in view of the time required (5 or more years) to establish a viable business, involved in servicing countryside recreation/sporting interests.

BOX 10.5: SUMMARY ASSESSMENT OF IMPACTS UPON TRADES & SERVICE ORGANISATIONS IN THE EVENT OF A SIGNIFICANT DECLINE IN LOWLAND GAME SHOOTING IN BORDERS REGION				
TYPE OF ORGANISATION	IMPACT ON ANNUAL TURNOVER	IMPACT ON EMPLOYMENT	IMPACT ON BUSINESS VIABILITY	GENERAL REMARKS
SUPPLIERS OF SHOT-GUNS & RIFLES, MAINTENANCE & REPAIR SERVICES, AMMUNITION & in some cases CLAY PIGEON SHOOTING) 4 No.	Between 55% and 70% of Total Annual Turnover is associated with Game Shooting, derived from approximately 60% of total Clients.	Of the total Full-time employment provided, between 69% and 90% is generated from game shooting. Over half the staff would be made redundant, involving approx 5 FTEs in the case of the 4 organisations.	Some of the businesses would continue at a much reduced level, because of the angling clients. In some cases the impact upon existing livelihoods would be devastating.	Businesses would only survive through diversification, which takes time, training and investment to achieve.
VETERINARY SERVICE & MEDICATION PRACTICES 4 No.	Approx 1% of Total Annual Turnover attributable to Shooting; split between gun dogs 2/3rds and poulters 1/3 rd . 3-6 % of clientele is involved in game shooting.			
GENERAL SUPPLIERS: DOG FEED, GAME FEED & (in some cases CLOTHING) 4 No.	At maximum, between 5 and 10% of Total Annual Turnover is generated by shooting clients. These clients comprise between 3 and 15% of the total clientele.	A very small proportion (2-5%) of staff time is spent servicing shooting customers.	The businesses would continue to be viable.	The impacts would be marginal.

TYPE OF ORGANISATION	IMPACT ON ANNUAL TURNOVER	IMPACT ON EMPLOYMENT	IMPACT ON BUSINESS VIABILITY	GENERAL REMARKS
INSURANCE & SECURITY FIRMS 3 No.	Shooting customers represent 2.5-3% of the total clientele and account for <1% of Total Annual Turnover.	Less than 5% of staff time is spent attending to shooting clients.	The businesses would continue to be viable.	Farmers who derive income from shooting are required to contribute a £100 premium.
GAME POULTS & (GAME FEED) FIRMS with diversification into the leasing of shooting grounds and the provision of keeping and allied services 6 No.	The Borders specific trade exceeds £1.0 million annually, derived from over 630 local clients.	At least the equivalent of 15 FTEs are totally dependent upon servicing shooting clients. These are represented by in excess of 25 full and part-time jobs.	The businesses would suffer either significantly or in some cases would be devastated, resulting in entire loss of livelihoods.	Game Rearing Businesses have already diversified by leasing shooting & providing keeping to generate continuous employment during winter months, thereby achieving a sustainable business. Staff have been trained to be multi-skilled. There would be significant winter-time knock-on effects on several other types of business, e.g.: 6 local hotels plus B& B establishments.
FUEL & VEHICLE MAINTENANCE FIRMS 4 No.	The Turnover contributed by Game Shooting customers represents a very small component of what are highly diversified businesses.	Virtually zero full-time employment would be affected.	The viability of the businesses would be unaffected.	The knock-on effects would be marginal and less than in the case of a ban upon fox hunting.
SPECIALIST CLOTHING FIRMS 2 No.	Between 12%-25% of Total Annual Turnover is directly generated by Game Shooting clients. These represent c.12%-20% of the total regular customers which exceed 2,000.	In the case of the 2 organisations at least 1.5 FTEs would be lost.	The businesses would continue, due both to other countryside sports (angling) and to passing trade.	The impact would be serious.

BOX 10.6: SUMMARY OF THE QUANTIFIED IMPACTS RESULTING FROM A LOSS OF/DECLINE IN LOWLAND SHOOTING CUSTOMERS FOR A SAMPLE OF TRADE & SERVICE ORGANISATIONS, LOCATED IN THE BORDERS REGION

TYPE OF TRADE & SURVEY SERVICE ORGANISATION	FIRMS INVOLVED IN THE SURVEY	ESTIMATED REDUCTIONS IN EMPLOYMENT		COMPENSATION TO BE SOUGHT	'DISASTER' OR 'SERIOUS' IMPACTS
	No.	Jobs Affected/ Lost: No	Representing FTEs: No	No.	No.
1. SUPPLIERS OF SHOT-GUNS & RIFLES, MAINTENANCE & REPAIR SERVICES, AMMUNITION	4	10	5	2	4
2. SUPPLIERS OF GAME POULTS & (GAME FEED)	6	27	15	6	6
3. SPECIALIST CLOTHING FIRMS	2	3	2	0	2
TOTAL	12	40	22	8	12

The Collection, Storage & Processing Dimensions

- 10.29** The revenue generating dimensions of the shooting sports also featured in the survey of Trades and Service Organisations. In this context the collection, storage and processing covered lowland game, grouse and venison.
- 10.30** In total, six firms were identified, though data was only collected from 3 of them, the others having ceased trading.
- 10.31** In all cases the survey was conducted by telephone, though a pilot interview was undertaken in one case resulting in the use of a questionnaire (ref **Appendix 10.2**).
- 10.32** The 3 firms that responded differed significantly in the scope of services offered beyond the point of purchase. These ranged from local retail sales by generalist butchers and bakers, to local wholesaling through specialist catering and delicatessen shop outlets, to export wholesaling. In terms of total annual turnover, the shooting products sold by the businesses accounted for widely different shares, varying from 5% through 20% to 100%. The total annual turnover of the 3 firms, directly attributable to shooting products was between £200,000 and £250,000.
- 10.33** In total, 10, primarily part-time, jobs were estimated to have been directly associated with the services/activities of these firms that related to shooting. The significance of most of these jobs was that they represented near full-time employment during winter months. It was estimated that overall they represented 4 FTEs.
- 10.34** The prospects for efficient/viable game dealing and processing businesses were considered in general to be good. However, two issues of note emerged from the survey, namely:
- the difficulties encountered in complying with the environmental health requirements for those products scheduled for export. This was said to be an administrative burden for the traders involved. The view was expressed that the operation of the regulations would be enhanced were they to be administered by a Meat Inspectorate;
 - both the domestic and particularly the export markets were reported to have been highly competitive in terms of prices, which have not been helped by high exchange rates.
- 10.35** The majority of the shooting produce is reported to have been purchased by traders located outside the Region and to have been sold in continental markets.

Hunting Survey Results

Survey Methodology

10.36 The Hunting Provider and Participant Questionnaires identified the names of the main trade organisations from which the respondents purchased goods and services, specifically relating to hunting. Based upon previous research undertaken by the consultants, the design of the survey questionnaires anticipated the existence of **34 different generic categories of trades and services (see Box 10.7) in the Borders Region**. The surveys themselves confirmed that the Hunts (i.e. the Providers) made purchases from 32 of them. In the case of the mounted followers (i.e. the Participants), the corresponding number of categories was **24**.

10.37 The questionnaires were analysed to determine:

- the frequency of individual trade and service patronage by provider and participant respondents;
- the level of annual expenditure allocated to individual trades and services by provider and participant respondents.

Initial Survey Results

10.38 Analysis of the provider and participant questionnaires revealed that in 1998/99 large numbers of organisations were involved in meeting the needs of both the Hunts and mounted followers. **Boxes 10.7 and 10.8** respectively summarise the results. Importantly, a distinction was made between locally based ('internal') firms and those which are 'external', i.e. located outside of the Borders and, indeed, outside of both Scotland and Great Britain. This distinction is important in the context of subsequently identifying:

- 'economic leakages';
- possible avenues for diversification; and
- the growth of local businesses through possible adjustments to the purchasing habits/preferences of both the Hunts and their followers.

10.39 The surveys showed that some organisations provided more than one type of product or service. This applied particularly in the case of those involved in the sales of horse care products (cleaning materials and medications), of related equipment (saddlery/tack repairs and new products, clothing and boots) and of firms involved in both selling fuel and servicing vehicles. However, even after adjustment was made for these dual/multiple activities, the total numbers of both 'internal' and 'external' organisations involved in servicing mounted followers of the Borders' hunts, were large: **approximately 650 local firms plus more than a further 400, operating from 'external' locations**.

BOX 10.7: SUMMARY OF TRADE & SERVICE ORGANISATIONS PATRONISED BY THE HUNTS (i.e. the PROVIDERS), OPERATING IN THE BORDERS REGION – 1998/99

The numbers are based upon the responses to a postal questionnaire sent to all 7 Hunts			
Type of Trade/Service	Numbers of Organisations from which purchases were made in 1998/99		
	Local/'Internal'	External	Grand Total
Feed	14	2	16
Bedding	5	0	5
Vet Surgeon	4	1	5
Medications	4	1	5
Physio-therapy	2	0	2
Saddlery/Tack Repairs	3	2	5
Farriery	4	1	5
Cleaning Materials	3	1	4
Insurance	5	2	7
Vehicle Repairs & Services	10	1	11
Vehicle Fuel	7	0	7
Transport	2	0	2
New Tack	5	0	5
Clothing	3	4	7
Boots	2	0	2
Building Construction	1	2	3
Building Maintenance	4	2	6
New Trailer	0	0	0
Horse Breeders & Dealers	0	1	1
Caterers	5	1	6
Public Houses & Hotels	12	0	12
Food & Drink Stores	6	1	7
Fencing Contractors	1	0	1
Coal Merchants	2	0	2
Printing	3	0	3
Room Hire	1	0	1
Jewellers & Engravers	1	0	1
Florist	1	0	1
Incinerator Repairs	3	0	3
Heating Oils	2	0	2
Accounting	1	0	1
Ammunition	1	0	1
Association Memberships	4	0	4
Taxes & Rates	1	0	1
TOTAL	122	22	144
% of Total	85	15	100

BOX 10.8: SUMMARY OF TRADE & SERVICE ORGANISATIONS “PATRONISED” BY MOUNTED SUBSCRIBERS – BORDERS REGION 1998/99						
The numbers are based upon 207 responses to a postal questionnaire sent to all Mounted Subscribers in November 1999						
Type of Trade/Service	Numbers of Organisations			Numbers of Mounted Subscriber “Patrons”		
	Internal	External	Grand Total	Internal	External	Grand Total
Livery	39	8	47	50	12	62
Hirelings	8	4	12	22	8	30
Feed	36	20	56	175	64	239
Hay	88	25	113	107	31	138
Grazing	41	10	51	43	10	53
Bedding	68	25	93	102	35	137
Vet Surgeon	17	22	39	161	55	216
Physio-therapy	17	12	29	68	36	104
Horse Dentist	7	15	22	18	82	100
Riding Instruction	32	13	45	79	21	100
Medications	29	22	51	117	35	152
Saddlery Repair	29	23	52	165	48	213
Farriery	24	17	41	131	68	199
Cleaning Materials	23	16	39	100	37	137
Insurance	21	31	52	69	68	137
Vehicle Services	75	33	108	143	45	188
Fuel Supplies	61	28	89	149	47	196
Transport	14	5	19	24	6	30
New Tack	18	30	48	112	74	186
Clothing	21	30	51	107	84	191
Boots	12	27	39	45	47	92
Building Construction	37	13	50	48	15	63
Building Maintenance	36	7	43	44	9	53
New Trailer	11	18	29	23	22	45
TOTAL	764	454	1,218			
% of Total	63%	37%	100			

10.40 Interestingly, whilst there was some overlap in terms of the organisations patronised respectively by the Hunts and the mounted followers, it was observed that many of them were different. In their role as ‘providers’ of a countryside sport, the Hunts needed to call upon the services of a wider number of trades and services than did the mounted followers. This is immediately apparent from comparisons between **Boxes 10.7** and **10.8**.

10.41 Further analysis revealed the names of the ‘top organisations’, in terms of those with the highest numbers of hunting customers and associated turnovers. In total, **54 such organisations**, covering many different categories of trades and services, were identified.

10.42 It was considered that a telephone survey of these organisations by broad categories would potentially yield some useful insights into the economic

contributions of hunting. The identities of the individual organisations remain confidential, but the profile of the generic survey population is displayed in **Box 10.9**.

BOX 10.9: NUMBERS OF MAIN TRADES & SERVICE ORGANISATIONS IN THE BORDERS REGION, FROM WHICH MOUNTED SUBSCRIBERS MADE PURCHASES DURING THE 1998/99 HUNTING SEASON

Category of Organisation	Number of Organisations mentioned by Respondents with citations > 5 no. & involving significant expenditure by Mounted Subscribers
Livery & Hirelings	9
Feed & Bedding	7
Hay & Grazing	1
Veterinary Surgeon / Dentist & Medications	7
Physio-therapy	2
Riding Instruction	3
Saddlery/Tack, Cleaning Materials	
Medications, New Tack, Boots & Animal Care Products	5*
Farriery	8
Insurance	3
Specialist Transport	1
Clothing	4
Building Construction	1
New Trailer	3
TOTAL	54

* Of these organisations, 4 are involved in the provision of multiple products & services

10.43 The survey was preceded by an explanatory letter, which was sent to each of the proprietors (owners/managers/senior partners) of the organisations, inviting them to participate and giving prior notice of the questions that they would be requested to answer. A copy of the letter, together with the attached list of questions/discussion topics, is displayed in **Appendix 10.3**

10.44 All of the organisations were telephoned over a 3 week period. A response rate of **94%** was achieved.

Telephone Survey Results: Trade and Service Organisation Proprietors

10.45 This particular survey, like all of the other surveys undertaken as part of this project, was conducted impartially. The survey results are summarised in **Boxes 10.10 and 10.11**. They reveal how collectively the ‘top’ trade and service organisations, participating in the survey, reported their levels of dependence upon hunting clients with respect to turnover and employment. In terms of vulnerability to possible changes to the hunting environment, the following pointers emerged:

- **14 of the 51** organisations (i.e. over one quarter) considered that their businesses would either “be devastated” or “be seriously put at risk”;

- whilst the issue of compensation did not feature in the questions, 2 of the organisations specifically raised the issue and indicated that they would need to seek compensation;
- the potential employment impacts could involve losses of **some 21 jobs (representing between 15 and 16 FTEs)**. It should be noted that many of the ‘vulnerable jobs’ mentioned currently involve technical support and administrative activities. In the majority of cases the jobs of people involved in performing either professional or major commercial tasks did not appear to be so much at risk. However, that did not appear to hold true for the livery, farriery and specialist transport businesses;
- of all of the trades and services, those particularly susceptible appeared to be:
 - **livery yards** with a high proportion of their winter turnover and employment specifically relating to hunting; and
 - **farriers**, whose turnover derived specifically from hunting was also concentrated during those ‘winter’ months when the level of other business is low.

BOX 10.10 SUMMARY ASSESSMENT OF IMPACTS OF A POSSIBLE SIGNIFICANT DECLINE IN HUNTING ACTIVITY UPON TRADES & SERVICE ORGANISATIONS IN BORDERS REGION

TYPE OF ORGANISATION	IMPACT ON ANNUAL TURNOVER	IMPACT ON EMPLOYMENT	IMPACT ON BUSINESS VIABILITY	GENERAL REMARKS
1. VETERINARY PRACTICES (The 7 leading Practices)	On average between 5 to 10% of Turnover would be at risk; in a couple of cases this would be between 12.5% and 20%.	1 FTE (representing 4 to 5 Part-Timers). 1 Locum might be shed. 1 FTE would require to re-train.	All businesses would carry on, but sole traders would suffer.	The profession would lose access to important post-mortem facilities, associated with the deadstock service organised by Hunts. The potential loss of hunting has to be seen in the context of the overall depressed farming climate in which Vets are having to operate.
2. INSURANCE FIRMS (4 Firms/Offices)	On average between 1 and 1.5% of Annual Total Turnover is directly associated with hunting.	Minimal and often Part-Time. There would be no job losses.	Zero.	
3. CLOTHING FIRMS (4 Firms)	The Proportion of the Annual Total Turnover attributable to hunting varies	1.5 FTEs would be lost. A Saddler would be forced to go Part-Time.	1 of the 4 businesses would be vulnerable, especially in	For the business heavily dependent on hunting things are already

	greatly between 5% and 50%.		winter. 2 of the 4 would feel the impact.	difficult.
4. FARRIERS (8 Operators)	On average 53% of the Total Annual Turnover relates to hunting. The range is 30% to 85%.	0.5 FTE would go. 1.0 Admin FTE would be reduced to 0.5 FTE; Employment of additional staff would be postponed.	The businesses would be highly vulnerable in winter.	"There would be a dramatic impact on my lifestyle; I would be reliant on Pony Club and Common Riding in summer plus a bit of iron work. Would have to close the business in winter; it would be devastating."
5. SADDLERY REPAIR FIRMS (3 Firms)	Between 25 and 60% of Total Annual Turnover associated directly with hunting.	2 FTEs would have to convert to Part-Time (i.e. the loss of 1 FTE, but no Job losses).	30 to 40% of Turnover would be lost. Great difficulties would be faced by one business which has taken 6+ years to establish. Diversification would present problems.	One of the businesses would seek compensation.
6. ANIMAL FEED & BEDDING FIRMS (7 Firms)	On average the Turnover related to hunting is 10% or less. In one case it is 50%.	Only in the case of one firm would jobs be lost. In that case the loss would be 1.5 FTEs; in all other cases the impacts would be absorbed.	In one case the impact would be serious; in some other cases, the winter impact would cause difficulties.	Diversification would be required to overcome the impact on profits.
7. RIDING INSTRUCTORS (3 Businesses)	Minimal.	Minimal or none.	Minimal or none.	No impact.
8. LIVERY & HIRELING STABLES (8 Businesses)	The average Annual T.O associated with hunting is approx £19K. This represents on average 50% of the Total Turnover. The proportions vary between 25% and 100%.	2 of the FTEs in jeopardy at least in winter. 1 FTE plus 1 Part-Timer + Casual. 2 FTEs + Casual. 0.5 FTE + 0.5 FT plus 1 FTE would all be lost.	It would have a devastating impact on all of the 8 businesses. The winter clientele would disappear. 3 of the 8 businesses would close. The other 5 would all attempt to diversify.	One of the businesses would seek compensation. It is not just the loss of clientele; there is much greater money in hunters. Other equestrian activities only require 'plodding cobs'.

9. TRAILER SUPPLY FIRMS (2 Businesses)	The two businesses are very different in scale. Both however involve hunting related turnovers of £40k and £45k per year. In one case this represents <1% of Total T.O; in the other case 25%.	1.5 FTEs would probably be lost from 1 business.	In the case of the large business, the impact would be marginal. The smaller business would suffer.	
10. TRANSPORT FIRM (1 Business)	Very little T.O involved.	Minimal.	Minimal.	3 Previous clients now have their own horse boxes: zero impact.
11. BUILDERS (1 Business)	Annual T.O associated with hunting is only about £10K.	Minimal.	Minimal.	Minimal impact.
12. PHYSIOTHERAPISTS (2 Businesses)	The annual T.O associated with hunting varies between 20% and 76%.	1 Part-Timer at least would be lost.	For one of the businesses it would be a disaster. Diversification would be pursued in both cases.	The big difficulty in seeking to diversify is how to fill the winter 'vacuum'.
13. ANIMAL CARE PRODUCTS FIRM (1 firm)	25% of the £30K T.O relates to hunting.	No FTEs would be lost.	A ban would be felt, but the impact would not be huge.	

BOX 10.11 : SUMMARY OF THE QUANTIFIED IMPACTS RESULTING FROM A LOSS OF/DECLINE IN HUNTING CUSTOMERS FOR A SAMPLE OF TRADE & SERVICE ORGANISATIONS, LOCATED IN THE BORDERS REGION

TYPE OF TRADE & SURVEY SERVICE ORGANISATION	FIRMS INVOLVED IN THE SURVEY	ESTIMATED REDUCTIONS IN EMPLOYMENT		COMPENSATION TO BE SOUGHT	'DISASTER' OR 'SERIOUS' IMPACTS
	No.	Jobs Affected/ Lost: No.	Representing FTEs: No.	No.	No.
1. VETERINARY SURGEONS	7	2	2	0	0
2. INSURANCE FIRMS	4	0	0	0	0
3. CLOTHING FIRMS	4	2	2	0	1
4. FARRIERS	8	2	1.5	0	5
5. SADDLERY REPAIR FIRMS	3	2	1	1	1
6. ANIMAL FEED & BEDDING SUPPLIERS	7	2	1.5	0	1
7. RIDING INSTRUCTORS	3	0	0	0	0
8. LIVERY & HIRELING STABLES	8	8	6.2	1	5
9. TRAILER SUPPLY BUSINESS	2	2	1.5	0	0
10. TRANSPORT FIRM	1	0	0	0	0
11. BUILDERS	1	0	0	0	0
12. PHYSIOTHERAPISTS	2	1	0.3	0	1
13. ANIMAL CARE PRODUCTS	1	0	0	0	0
TOTAL	51	21	15.5	2	14

10.46 With regard to the last pointer, it was noted **between 25% and 100%** of the annual turnovers of the livery yard proprietors' consulted were said to be dependent upon hunting. The corresponding estimates for farriery services were between **33% and 85%**.

10.47 Because of the concentration of hunting activities in the winter months when the turnover derived from other equestrian activities is low, most of the proprietors of equestrian-related businesses considered that they would experience serious seasonal difficulties. This point was made universally by farriers, livery yard owners and physiotherapists.

10.48 Virtually all of the proprietors of the most vulnerable businesses mentioned the need to consider diversification and, in some cases, re-training. However, the prospects for diversification were not viewed as encouraging. Indeed, the

prospects of change appeared to be especially austere, in view of the time required (5 or more years) to establish a viable business, involved in servicing countryside recreation/sporting interests.

Concluding Comment

- 10.49** Whilst the dependence of the supporting trades and service organisations upon countryside sports varied significantly between sports, it was evident that many organisations benefited, both in terms of annual turnover and employment. Between the three generic sports approximately 35 local trade organisations were identified as businesses with a very high level of dependence. In essence this meant that, from the evidence collected through the surveys, the viability of all of these firms was highly dependent upon the development potential for the 3 generic sports.
- 10.50** For reasons of confidentiality, the total annual turnover that these organisations derived from countryside sports could not be determined in absolute terms. However, in terms of employment, the surveys identified that collectively these 'high risk' businesses sustained employment amounting to over 50 FTEs. The surveys also highlighted that on average across the three generic sports, each FTE on average represented between 2 and 4 part-time jobs (in the case of grouse shooting the ratio was much higher, namely over 1 to 10). Thus collectively these organisations sustained between 100 and 200 jobs directly as a result of countryside sports. Due to their concentration in the winter months, these jobs were also shown by the surveys to have made a further important contribution.

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Mr H. Straker, The Game Conservancy Ltd

Linda Walker, Scottish Borders Tourist Board

Denise Walton, Co-ordinator, Borders Foundation for Rural Sustainability