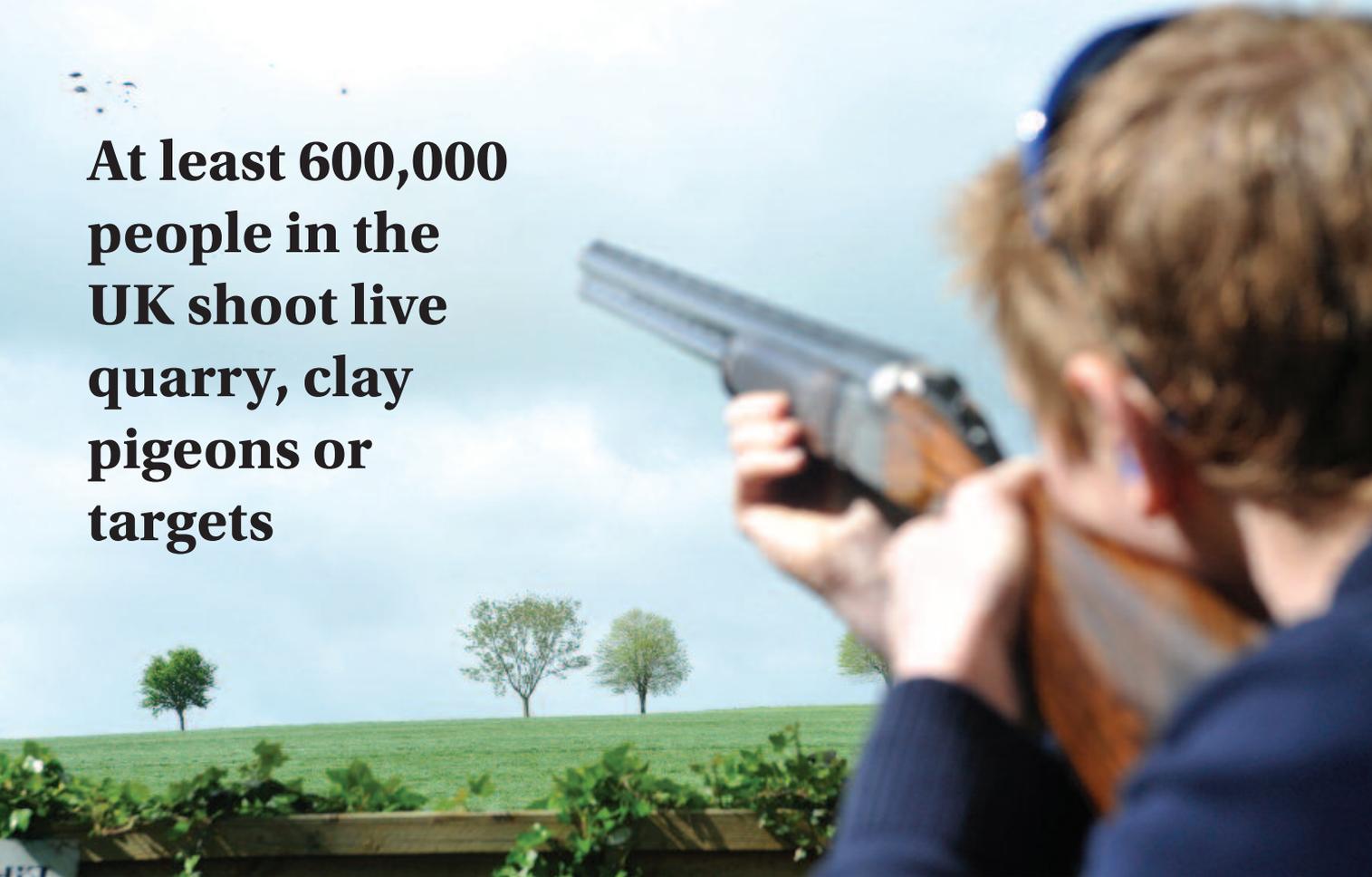


THE VALUE OF SHOOTING

The economic, environmental and social contribution of shooting sports to the UK

by Public and Corporate Economic Consultants (PACEC)

At least 600,000 people in the UK shoot live quarry, clay pigeons or targets



Nearly two million hectares are actively managed for conservation as a result of shooting



Shooting is worth £2 billion to the UK economy





MAIN FINDINGS

In the UK today...

- Shooters spend £2.5 billion each year on goods and services
- Shooting is worth £2 billion to the UK economy (GVA)
- Shooting supports the equivalent of 74,000 full-time jobs
- Shooting is involved in the management of two-thirds of the rural land area
- Nearly two million hectares are actively managed for conservation as a result of shooting
- Shoot providers spend nearly £250 million a year on conservation
- At least 600,000 people in the UK shoot live quarry, clay pigeons or targets
- Existing industry information shows that there are at least 1.6m individuals who shoot live quarry with an airgun
- Shooters spend 3.9 million work days on conservation – the equivalent of 16,000 full-time jobs

The full report can be viewed at: www.shootingfacts.co.uk

ABOUT THE SURVEY

This report presents the findings of independent research into the economic, environmental and social contribution of shooting sports to the UK. It was commissioned by 17 organisations involved with shooting and the countryside, and undertaken by Cambridge-based Public and Corporate Economic Consultants (PACEC) who have worked for the Department of Trade and Industry, Defra, HM Treasury, the Rural Development Commission and the National Audit Office, among others.

The Value of Shooting is a follow-up to Shooting Sports, a report on the survey produced in 2006 when PACEC were commissioned to investigate the economic and environmental effects of live quarry shooting. The results of this report are not directly comparable with the 2006 study as that report only covered live quarry shooting and did not include clay pigeon and target shooting.

The new research was concentrated around large-scale surveys of the people occupying key

roles in organisations which provide shooting sports opportunities (termed “providers”) and shooting sports participants. Participants are people who shoot any type of live quarry across the UK or participate in clay pigeon or target shooting.

The purpose of the survey of providers and participants was to look at the employment and monetary flows of those responsible for providing shooting opportunities and those participating in the sports, to assess the direct, indirect and induced impacts of shooting on the UK economy.

In addition to the economic benefits of shooting, the surveys assessed the environmental and social effects by asking providers and participants questions relating to their shooting opportunities - and associated land management practices and the social aspects.

The data collected were based on a 12 month period between August 2012 and July 2013.

A total of 16,234 questionnaires were completed, making this the most comprehensive research into the value of shooting ever undertaken in the UK.



Definitions

As a form of shorthand it has been occasionally necessary in the report to use everyday words or phrases to denote a more technical concept. These are the more important definitions:

Avian pests/predators: Birds such as pigeons which cause problems with agriculture and corvids which cause problems for rearing of game.

Beater: Person who flushes wild game during a shooting day.

Club: Typically a group of more than 10 people shooting a variety of quarry or targets over fixed pieces of land. The distinction between Club and Syndicate in this study rests with the perception of the providers and participants who filled in questionnaires.

Coastal Wildfowling: The shooting of ducks, geese and waders on coastal land affected by tides.

Corvid: Avian predator in the crow family.

Cover Crops: Crops (such as kale and millet) planted on shoots to provide gamebirds with food and shelter

Couvert: A cove that shelters game.

Deer Stalking: Shooting deer for deer management and/or crop protection.

Driven Game: Form of shooting in which upland and lowland gamebirds are flushed over standing Guns.

Full Time Equivalents (FTE): The number of full-time employees that could have been employed if the reported number of hours worked by part-time employees was worked by full-time employees. This statistic is calculated by dividing the “part-time hours paid” by the standard number of hours for full-time employees then adding the resulting quotient to the number of full-time employees.

Full time jobs: Assumed to be 37 hours a week for 232 days per year.

Gamekeeper: A person who works on a farm or estate to look after game species, their habitats, and the other wildlife that shares them. They may rear birds for release into the wild for shooting purposes.

Game wardening: The management of game in the context of habitat and wildlife management.

Gross Value Added (GVA): The standard monetary measure of the value of economic activity. Equal to the sum of employment costs plus profits. Equivalent to the value of goods and services produced minus the inputs (raw materials, services etc) required to produce them.

Gun (with a capital G): A shooter of any type of quarry (not just game – a wider definition than in colloquial use).

Gun Days: In live quarry shooting, a participant is colloquially known as a “Gun”, and a measure of activity is the GunDay, which is equal to the number of shooting days multiplied by the average number of Guns per day. We have used an equivalent measure for clay and target shooting but have assumed half-day participation for all members.

Gundog: Dog specially bred and trained for locating, flushing and retrieving shot game.

Inland Wildfowling: The shooting of ducks, geese and waders on inland sites using flight ponds / marshes.

Live quarry shooting sports: The shooting of birds and mammals for recreation, pest or predator control.

Pest control: The control of pest species using a gun in the context of shooting sports activities, and crop protection.

Picker Up: Person who retrieves shot game with the aid of gundogs

Quarry species: A legally shootable bird/animal which has an open season. Bird species commonly regarded as pests, e.g. woodpigeon are shootable for crop protection / other reasons under general licences.

Reared / Released birds: Gamebirds released into the wild by the shooting provider for shooting purposes.

Rural land: All land in the UK which is not defined as urban, i.e. not in a settlement of 10,000 or more people. (DEFRA definition.)

Shooting Days: A “Shooting Day” is a record of the time spent on and around the site, including all the social aspects, for shooting sports. Some or all of a morning is half a day. Some or all of an afternoon/evening is half a day. Most formal live quarry shoots would therefore count in units of full days. Much wildfowling, informal shooting (including pest control), clay pigeon and target shooting would be counted in units of half days.

Shooting participants: Those who take part in shooting sports (live quarry, clay pigeon, or target shooting), and either pay to do so, or do so for nothing. Many providers are also participants

Shooting providers: An organisation/business (with employees and/or members) or individual who performs services (either paid or voluntary) which give rise to opportunities for shooting sports

Spinneys: Small strips of trees and shrubs planted, usually in areas with little or no existing woodland

Stalker: Person who shoots deer for recreation, deer management, or crop protection purposes.

Suppliers: A range of firms/individuals which supply shooting providers and participants with related goods and services. Potential suppliers include: shooting agencies (sales), accommodation, shooting training, land management services, reared game (for release)

Syndicate: Typically a group of people shooting game over fixed or varying pieces of land. The distinction between Club and Syndicate in this study rests with the perception of the providers and participants.

Walked Up Game: Form of shooting in which the shooter flushes gamebirds as he/she walks over the shooting ground.

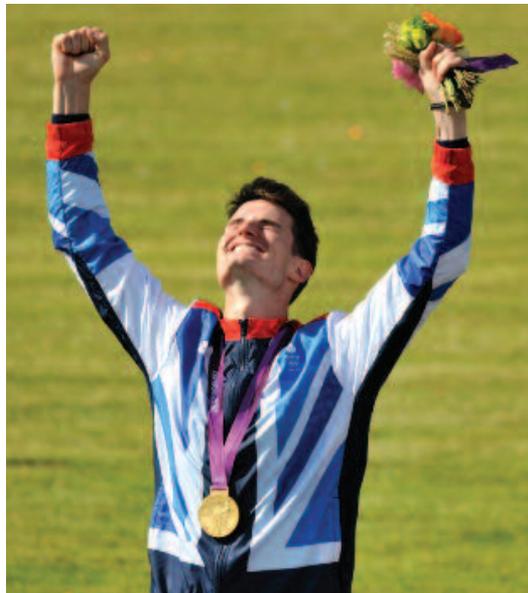
Welcome...

Foreword by Lord Curry

It's remarkable that the United Kingdom - a country with such a small land area - should be the home of such varied shooting sports. From game and rough shooting, through wildfowling and clay pigeon shooting to rifle and target shooting disciplines, these activities make a significant contribution to our social, environmental and economic life.



Like many activities its size and impact can be taken for granted. We rarely consider the expense, work and effort that goes into putting game, a food that is rapidly increasing in popularity, into the shops and onto our plates. Target and clay shooting rarely crosses our radar until we win a well-earned medal during the Olympics or other international games. We often take the shape of the countryside, the ponds, hedgerows, field margins and woods, for granted. If asked to quantify the value of these things most of us, including policy makers and



opinion formers, might find ourselves in difficulty.

No longer; this independent and statistically robust report gives us the latest facts and figures. It demonstrates that shooting in the UK is involved in the management of most of the countryside, actively shaping the world around us with hundreds of millions of pounds of private funding of conservation effort. It records the tens of thousands of people who find their recreation and sport on the shooting ranges and clay grounds across the country. It shows, for the first time, the social benefits of an active recreation enjoyed by people of all ages and backgrounds. Overall this report demonstrates that shooting is a major player in our national economy, providing much-needed work and income, particularly in the "off" season in rural areas, but also in urban and suburban areas. At a time when government and health professionals are urging us to get out, exercise and enjoy the countryside, this report shows how shooting contributes to a national policy to encourage all forms of social and mental wellbeing.

I recommend this report to politicians, policy makers, journalists and all with an interest in the social, economic and environmental prosperity of our country.

Benny of Kirkcaldy



Lord Curry sits as a cross-bench peer in the House of Lords and is chair of the Better Regulation Executive at the Department for Business, Innovation and Skills. He chaired the Policy Commission on the Future of Farming and Food reporting to Government in January 2002 and was responsible for overseeing the Government's Strategy for Sustainable Farming and Food until March 2009. Among many current interests he chairs the Steering Board of Farming Futures (the Centre of Excellence of UK Farming) a consortium of academic and industrial partners who are combining their scientific knowledge to develop practical 'knowledge transfer' solutions for sustainable food production in the UK.

SHOOTING'S WORTH £2 BILLION A YEAR...

Shooting is an important part of the economy, both through direct spending and the stimulus to wider economic activity which helps to sustain communities, especially in some hard-pressed rural areas.

Despite the worldwide recession, shooting has come through well. There are indications that participation has fallen for some stakeholders (a reported trend of large game shooting days being cut back, for example) but this is now reviving and shoot providers are optimistic for the future.

Most importantly though, is that shooting provides valuable income to the economy. The survey reveals that shooters spend an estimated £2.5 billion a year on goods and services. This produces a direct financial benefit to the UK -

defined as gross value added (GVA) - of £2 billion a year.

Shooters themselves spend money on guns, ammunition, shooting clothing and accessories, travel, accommodation and payment to the providers. The providers will pay for materials or services, such as fencing, game cover crops and the wages of gamekeepers. They also supply downstream businesses with goods and services, producing a trickle-down effect that is estimated to encompass an area up to 15 miles from the shoot itself. On average providers said that 82% of their income came from their local UK area. Additionally, 64% of providers said that all of their staff lived within 10 miles of the shooting site.

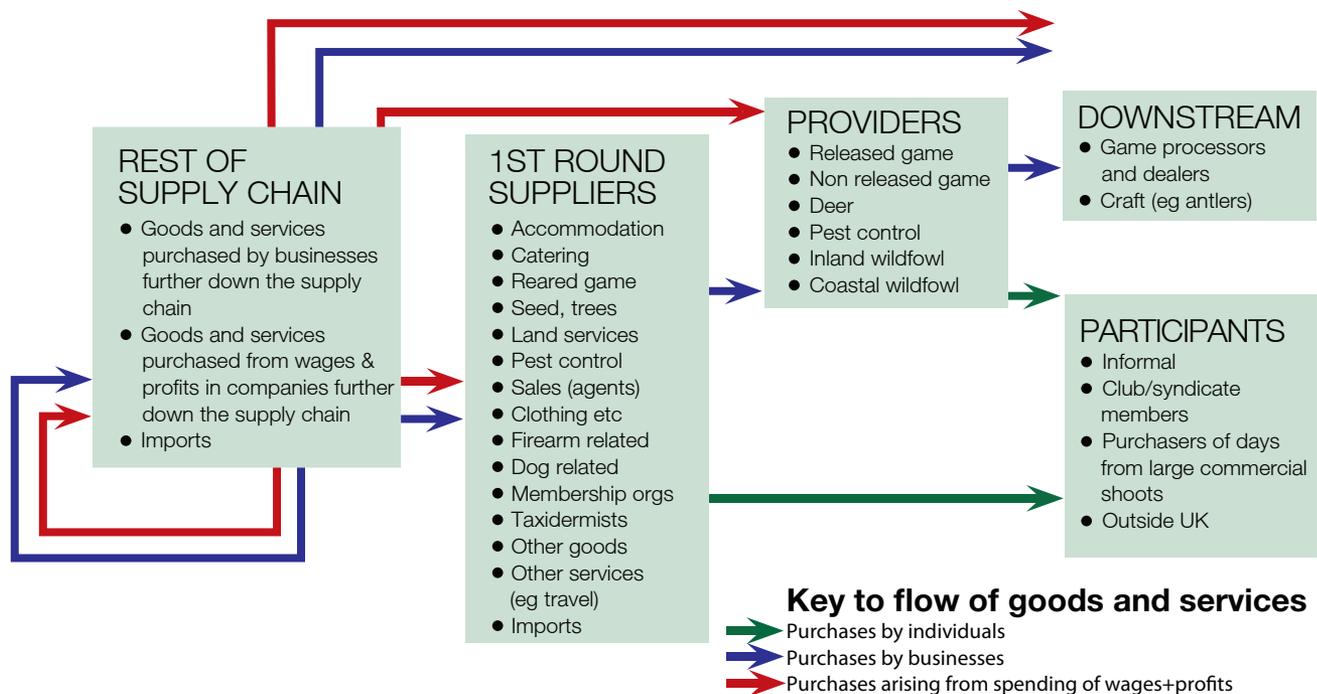
Every one of these transactions creates further economic activity, including employment, as firms buy from local retailers and suppliers.

For instance, the fencing contractor buys posts

from the local sawmill, who buy their timber from the estate, which employs the forestry contractor, who buys plant from the agricultural supplier, who employs a local workforce - the supply chain effect.

Furthermore, the wages earned and suppliers' profits are ploughed back into the local economy benefiting many activities not directly associated with shooting, and, by providing employment, helping to underpin the social fabric of the countryside. The gamekeeper fills his vehicle with fuel at the local garage, spends his wages locally and sends his children to the local school.

Shooting provides a source of income that runs in harmony with the rural community. Added bonuses are the social aspects of the shoot which bring together both local people of all backgrounds and visitors, and often provide a focus in dispersed communities where the opportunity for social interaction may be limited.





CASE STUDY – Ammunition manufacturer, the Midlands.

Created more than 15 years ago, this Midlands-based ammunition manufacturer contributes greatly to the UK shooting scene. The company has a turnover of around £8m and employs 21 full-time staff. Using state-of-the-art, fully automated equipment, this company produces over 30 different models of cartridge – one of which was used by an Olympic gold medallist. Fifteen percent of the firm’s output is exported. Product development is key for the company as it has to keep pace with changing technologies and customer needs. As such, on-site training is crucial to maintaining skill levels within the company – ensuring their products meet rigorous quality standards and that the company remains competitive.

... AND SUPPORTS 74,000 PAID JOBS (FTE)

A key finding of the study is that in the UK shooting supports the equivalent of 74,000 full-time jobs (FTEs). Of these 35,000 jobs are supported directly by shooting providers. The remainder are supported indirectly through purchases from suppliers by both individuals and businesses, and as a result of spending wages and company profits.

JOBS SUPPORTED BY SHOOTING (FTE)

Number of supplier jobs supported	16,000
Number of jobs supported in downstream businesses	740
Number of supply chain jobs supported (includes expenditure multiplier effects)	22,000
Total number of indirect jobs supported	39,000
Beaters and pickers-up	14,000
Shoot managers, gamekeepers, others	21,000
Total number of direct jobs supported	35,000
Total number of paid jobs supported	74,000

Shooting sports providers generate 350,000 direct paid jobs. Most are seasonal and/or part time – their FTE is 35,000. Much of the work is undertaken voluntarily – catering, for instance, may be provided

by family members – but shooting still generates the equivalent of 35,000 direct and 39,000 indirect full-time paid jobs – including 16,000 indirect supplier jobs and 22,000 in their supply chain. And those jobs which are unpaid may still make an economic contribution by providing services. These people may also spend in the area on such items as shooting accessories, travel, food and drink.

One of the larger job categories is beaters and pickers-up but as they are only involved on shooting days the number of actual FTE jobs is relatively low. They do, however, provide a valuable source of casual employment in rural areas, especially for young and retired people.

Existing gun trade information shows that there are more than 2,000 trade outlets, employing up to 10,000 people. They supply up to 100,000 products, worth £200-300m a year, including 170 million cartridges. Trade suppliers to the shooting industry also support jobs in their own supply chains.

“Over the period of the survey shooting participants in the UK spent a total of £2.5 billion on goods and services, of which £860 million was spent with shooting providers or on site”

CASE STUDY –

Clothing, guns & accessories

Established in 1845 as an ironmongery store, this family business has evolved into a one-stop-shop for guns, shooting and shooting accessories. The company employs 38 members of staff – including five full-time and two part-timers who work solely within the accessories department. As well as a fully-stocked gunroom, the firm also sells a comprehensive range of shooting gear; from clothing to security cabinets, decoys to dog whistles – and pretty much everything in between.

“ The company expects to see annual double-digit growth ”

The company has been developing and growing the e-commerce side of its business for several years and the turnover of online sales is now more than £1.5m. The company expects to see annual double-digit growth in this sector in the future.

The company thrives on the high quality of its customer service and ongoing in-store training features highly in maintaining the standards.

Following on from the one-stop philosophy, the company also organises small shoots locally. These have an impact on the local supply chain; footfall in the town centre increases on shoot days, with hotels and restaurants benefitting from the Guns visiting the area.





TRAINING AND EXPERIENCE FOR YOUNG PEOPLE

Six per cent of the providers in the survey said that they provided apprenticeships, and a further 28% said that they provided other formal or informal/on-the-job training on site. The apprenticeships most commonly undertaken include gamekeeping but also incorporate agricultural activities and gunsmithing. The other training provided was much more likely to reflect the activities of shooting ranges, including range officer training, firearms safety, general health and safety, and the responsibilities of training new members.

Around one in six providers stated that they maintained links with local educational establishments or provided school visits. These include the provision of shooting experience and training to cadet forces, scout groups, and Duke of Edinburgh award scheme members. There are also links which emphasise the environmental benefits of shooting and conservation, or simply use shooting locations for nature walks or “forest school” – type outdoor lessons.

CASE STUDY –

The apprentice gunsmith – Suffolk

Long-established gunsmith Trulock & Harris is based in a small town in Suffolk. The highly specialised business deals in gun sales and gun repairs - which provide the majority of the firm’s annual turnover in equal proportions. A large range of accessories, clothing and ammunition is also sold. The majority of business is done ‘over the counter’, says owner Jason Harris. This helps him get to know his customers and provide a personal and professional service and is one reason the business doesn’t offer an online or mail-order service. Approximately 90% of the custom is local but a good number of customers

travel from London.

The business employs six local people, either on a full- or part-time basis. The company recently decided to place one of the employees, “a young lad”, on an apprenticeship scheme. This was not only to improve the skills available within the company but also to give a young person who had come to get some work experience “a chance”. There was also a need to replace the skills, in time, of a very experienced employee who had passed retirement age. This was the first time the business had gone down the apprenticeship route with a young person.

The training combines attendance at college with on-the-job training – working with experienced staff in

the workshop. The apprenticeship lasts five years, with the two-year part-time college attendance being part of a Government scheme. On completion this leads to a recognised qualification.

The scheme also provides the apprentice with a clear career path, linked to improved remuneration, responsibilities and prospects. This also increases the chances of retaining the apprentice, which will enhance the company’s skills base and ensure the quality of its work.

For both the business and the ‘young lad’ the scheme has been a big success and Jason Harris says: “The experience of having an apprentice has benefited us so far and we would certainly do it again.”

SHOOTING AND TOURISM

Shooting directly supports the equivalent of 5,200 full-time jobs in the food and accommodation sector. This helps to sustain rural communities in the autumn and winter when income from other forms of tourism is substantially reduced. This can make the difference between profit and loss for some rural services.

“The number of shooting visitors will increase by up to 80% in the next four years”



CASE STUDY –

Hotel in the NE of England

Nestling amid the rugged hillsides in the North Pennines, the Lord Crewe Arms in Blanchland, owes a huge debt to the shooting industry. And so it should! Despite being far from the conventional tourist trail and only accessed by minor B-roads, it's lucky enough to be based in the heart of some prime shooting country - with a large number of shooting sites within easy reach. The shooting areas range from just five acres to a whopping 16,000-acre estate so it's an ideal venue for all types of shooting guests.

Although the hotel doesn't owe its entire living to shooting folk, the manager Tommy Marks insists that the 'high-end' guests make a significant contribution to the bottom line, and reckons the growth in the number of shooting visitors will increase by up to 80% in the next four years – a fantastic achievement – and a huge bonus for the local economy.

The traditionally-run establishment has 21 bedrooms and a cosy restaurant. Most of the shooting clients who stay are English (80%) but there are also regular visitors from Belgium, Switzerland, Germany and France. Shooting clients often travel in small groups, bring their partners along for the trip, and usually stay for up to five nights. After a great day's shooting they tend to dine in the hotel's restaurant each evening.

With such discerning guests the hotel has to have well-trained staff and the number of local people employed increases considerably in the shooting season.

There's a blend of skills required to run the establishment so the hotel funds two apprenticeships in hospitality skills. Other training is organised for staff through the regional further education colleges and private training on-site. Virtually all the services and food are sourced locally, especially seasonal game and local ales.



CONSERVATION

There is abundant evidence that where land is managed for the benefit of game, other species naturally flourish and many shoots undertake conservation work for its own sake. Shooting providers in the UK spend nearly £250 million a year on conservation work. In comparison, this is more than eight times the amount the RSPB spent on conservation on its reserves in 2013 (£29.6m).

Expenditure on conservation represents a fifth (21%) of all costs borne by shooting providers and the time spent on conservation on shooting land totals 3.9 million work days. That is the equivalent of 16,000 full-time conservation jobs. In addition, 29% of shooting providers said that they had a conservation designation on part of their site.

With increasing pressure on farmers to manage their land for enhanced biodiversity, shooting offers exceptional opportunities.

By improving habitat landowners can simultaneously increase their income from shooting rents and reap the financial benefits of environmental stewardship schemes. So where shooting takes place the need to maintain and improve habitat for game allows farmers and landowners to bring even more land into conservation and helps fulfil the terms of agri-environment schemes. Furthermore, shooting rents can provide a substantial contribution towards the costs of conservation work.

This integrated approach – harmonising recreational use with agri-environmental policy – can provide an immediate economic return on enhancing wildlife, and is capable of doing so on a landscape scale.



CASE STUDY – The grouse moor

The grouse moor is part of a family-run estate in the north east of Scotland and typically provides around 20 days shooting a year. It is a major employer and through direct spending, and the spending by visiting shooters, contributes significantly to the local economy. Guests usually stay for four or five days in local accommodation or in the five-star hotel the estate created from converted farm buildings and which provides an important part of the shooting experience.

To manage the 6,000 ha of moorland there are three full-time gamekeepers, who are highly qualified, and a trainee who is on block release from college. But on shoot days 50 beaters, including 25 college students, are recruited locally. There are also full- and part-time housekeepers who provide refreshments for the shoot while other members of the estate's 50 full-time staff contribute to the shooting activities when necessary.

Most of the grouse shot go to a local specialist food company while some is prepared by a game dealer for the estate's owners, staff and visiting shooters.

There is a close relationship with the local community, not only through providing employment and buying everything from food to vehicles, but through engagement with primary schools, who visit the estate and, an open day for secondary schools and colleges.

Conservation work is high on the agenda with the estate encompassing several Sites of Special Scientific Interest and the head keeper is involved in research on moorland management. There has been extensive planting of shelter belts and the forestry is being managed to encourage wildlife, particularly red squirrels.

In the UK as a whole shooting providers have management responsibilities over some 14 million hectares. That is about two-thirds of the total rural land mass. Within this area active shoot management – managing heather moorlands, and planting trees and hedgerows, for instance – is undertaken on nearly two million hectares, which represents 12% of the UK's rural land.

This is more than ten times the total area of all national and local nature reserves. The largest area of land by far over which beneficial management takes place is heather moorland.

While the majority of shooting related conservation work, by area, focuses on moorland and woodland it is the smaller projects that can often have a greater impact. Defra has stated that priority habitats require positive management to enhance their conservation status and such developments as hedgerow and pond creation can be vital.

Research by the Game and Wildlife Conservation Trust (GWCT) shows that woodland managed for shooting rather than for commercial timber production provides richer and more varied habitat. In the wide rides required for shooting, there can be four times as many butterflies as on woodland edge, and in 2012/13 shoots managed 500,000 hectares of woodland. In addition they managed 100,000 ha of copses specifically planted to shelter game.

Habitat improvements on land managed for shooting include creating or maintaining:

Copses	100,000 ha
Hedgerows	7,000 ha
Wetlands	20,000 ha
Conservation headlands	30,000 ha
Retaining overwinter stubbles	140,000 ha
Management of heather moorland	850,000 ha

Game shoots also maintain 25,000 ha of cover crops. These provide an important source of food and shelter for songbirds, particularly during the winter. (Source: GWCT)



CONTROLLING PESTS

The control of pests and predators makes a significant contribution to the conservation of many vulnerable species, particularly ground-nesting birds. Species such as rats and crows attack both songbirds and game birds, stealing their eggs and eating their young. Left uncontrolled, pests and predators can damage biodiversity. They can also have a serious economic effect.

Woodpigeons are a major agricultural pest and the NFU has estimated that without control the damage to oilseed rape crops from pigeons in East Anglia alone would amount to more than £45m. More than 50% of shooters are involved in protecting crops from pigeons and other avian pests, and an estimated 510,000 Gun Days were spent doing so in the period of our survey.



“Working in conjunction with employers the college also provides apprenticeship training”

CASE STUDY –

The college

This college of further education provides full-time courses in game management and has an intake of around 25 students each year. Demand for places on the courses has remained constant and this is not expected to change in the future. The two qualifications on offer are a Level Two in Countryside and Environment, and a Level Three in Countryside Management. Working in conjunction with employers, the college also provides apprenticeship training. The course content includes modules in gamebird production, shoot management, deer stalking, firearm use and management, and pest and predator control. The courses are taught by a staff of five, all of whom have direct experience of the industry, including gamekeeping.

Uniquely the college has its own small shoot of around 500 acres. This gives students first-hand experience of shoot management. They take overall responsibility for the shooting, including the rearing and release of around 1,200 partridges and about 900 pheasants (half of the latter being sold and the remainder released on to the farm.)

This hands-on training ensures that students have the appropriate skills that employers say they need. The college has a high completion rate and an excellent record in helping secure jobs for students.

The college works closely with employers, BASC and other organisations in configuring course content - which is aligned to employer needs and is continuously reviewed and improved. The college works extensively with local employers, particularly farms and local shoots, primarily in providing apprenticeships, for example, and the students contribute to the creation and conservation of wildlife habitat in the area.

Shooting activity, and the training needed to support the sector, also has social and community benefits. For example, the college shoot this year will work with Band of Brother's shooting, a subsidiary of the Help for Heroes charity.

ACTIVE CONSERVATIONISTS

To stop shooting would severely damage the conservation of wildlife and biodiversity. Among shoot providers, who help to manage an area the size of Wales, two thirds would reduce the effort they put into managing habitats. The table on p26 shows the kind of improvements which would suffer and the hundreds of thousands of hectares which might be affected.

In effect, shooting provides a huge army of conservationists – people who actually go out into the countryside, work to improve it and invest a huge amount of their own time and money on projects. More than half of all shoot providers said that conservation work was either financed by shooting or undertaken voluntarily. Other funding came from subsidies, grants and a substantial amount of private expenditure.

In preserving and enhancing habitat for wildlife, shooting sustains the natural beauty of the countryside. This is something from which everyone can benefit. Whether you go to the countryside for recreation or simply view it from the window of a car or train, the landscape which you enjoy owes much to the care of people who shoot.

Step out of your car and the abundant wildlife of areas managed for shooting enriches the experience of all who visit the countryside, while the £10m invested in private roads and tracks each year can make that experience all the more accessible.

And shooting itself is a means of accessing the countryside. Many shooters do not live in rural areas but in cities, towns and suburbs. For them shooting can offer the chance to escape from the urban environment and re-connect with the natural world.

HOW MUCH LABOUR IS REQUIRED TO CARRY OUT THESE ACTIVITIES?

An estimated 3.9 million work days are undertaken each year on habitat and wildlife management for shooting in the UK. This is the equivalent to 16,000 FTEs (not necessarily paid).

The most labour intensive management tasks are game wardening (4,700 FTE), pest control (3,100 FTE), and maintenance of woodlands (1,600 FTE).

Breakdown of labour undertaken for habitat and wildlife management practices for shooting sports (FTEs)

Create or maintain conservation headlands	440
Create or maintain grass strips around fields	560
Create or maintain hedgerows	790
Create / maintain 'covert' (copse that shelters game)	940
Retain overwinter stubbles	480
Plant cover crops	96
Create or maintain beetle banks	170
Maintain banks of streams and rivers	450
Maintain woodlands (coppicing, thinning)	1,600
Create or preserve wetlands	100
Create / maintain release pens	450
Plant native trees	630
Remove trees to create glades/rides	270
Manage heather moorland (general)	120
Re-seed heather moorland	12
Re-wet deep peat	12
Block grips	1
Control bracken	170
Create ponds and scrapes	3
Create or maintain flight ponds	210
Pest control (to protect game and habitats)	3,100
Litter picking	400
Game wardening (general habitat management)	4,700
TOTAL	16,000



16,000 FULL-TIME CONSERVATION WORKERS

While the amount of money devoted to habitat improvement and wildlife is impressive, the effort put in by shooters themselves is vital to conserving the countryside.

An estimated 3.9 million work days are undertaken each year on conservation for shooting in the UK. Much of this relates to heather moorland and grouse management. This is the equivalent of 16,000 full-time jobs. (In comparison, Natural England and Scottish Natural Heritage together employ fewer than 3,000 full and part-time members of staff.)

The work carried out by shoot providers often complements that of other conservation organisations, with whom they frequently work in partnership, and it is often undertaken in addition to the work of the landowner.

Thirty two per cent of providers employ at least one paid gamekeeper whose duties include habitat and wildlife management. This can have significant benefits for the countryside and biodiversity.





CASE STUDY –

The DIY shoot

This shoot in North Wales is a typical recreational game shoot. The syndicate comprises around 20 people who share the cost (and time commitments) required to run and manage the shoot. It provides ten days' game shooting a year – at an affordable cost – usually resulting in a bag of between 30-40 birds per day.

The members are joined on shoot days by another six or seven people who help with the beating line. The members' dogs retrieve the shot birds. At the end of the day's shooting the game is distributed between the Guns, beaters and helpers. All the shot game gets eaten.

The ongoing management of the shoot benefits both farming and conservation interests. The shoot manages pests and predators; this reduces losses in farm stock (especially new-borns), game birds and general wildlife from predation or food competition. The shoot operates live-catch traps for corvids, it controls foxes using lamp and rifle and it constantly strives to reduce the number of rats and grey squirrels in the area. It has just started to monitor for the presence of non-native American mink which can dramatically reduce the numbers of water vole and other species of conservation concern.

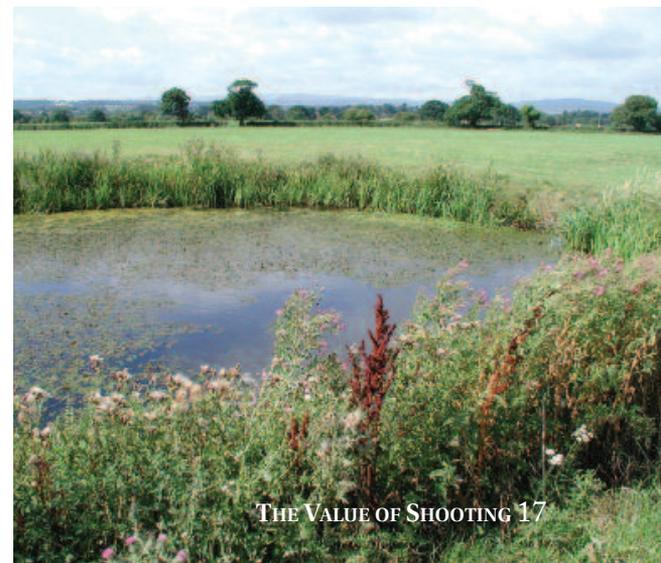
The shoot also spends time and money on habitat management to benefit game and wildlife. Members have access to a small field where they grow game cover crops and have recently shared the costs and labour with the farm for replanting and fencing off a hedgerow to improve the connection between different habitats. Shoot improvement also provides one of the few incentives for woodland management which, among other benefits for wildlife, involves maintaining or creating gaps in the tree canopy to allow ground plants to complete their lifecycle and to encourage a good understorey. Fallen trees have been cleared and the wood retained and piled to provide increased shelter for game and wildlife.

To improve the quality of habitat in the woodlands the shoot worked with the farm, BASC, FWAG Cymru and statutory agencies in Wales to fence off the woodland to exclude livestock – the ancient woodlands have sensitive ground flora that were at risk from trampling. Additionally, a river running through the woodlands was being damaged by livestock. As a result the fencing allowed the farm to control animals better; it improved 20 hectares of ancient woodland and improved the water quality of the river. The shoot also benefitted with both game and wildlife having a better quality of habitat.

This project work and the general work of the shoot demonstrate the multiple benefits that shooting provides for conservation, the economy and to society through participation and promoting a healthy environment.



“ The ongoing management of the shoot benefits both farming and conservation interests ”



Shooting's social side

Shooting generally takes place in a well-managed and pleasant environment. In over 93% of cases in the survey, shooting participants agreed (even strongly agreed) that shooting sites are healthy and attractive. In a similar vein, 87% agreed or strongly agreed that shooting contributes to the social fabric of the local area and 97% said it contributes to their wellbeing.

All in all, shooters seem to be at one with their surroundings and are happy to enjoy their chosen sport with friends and colleagues. Even on non-shooting days shooters use the opportunity of working and helping around their shoot as a great way of staying in touch with friends.

Shoot days, whether live quarry or at the shooting ground, are eagerly anticipated and are well attended across all types of shooting. The survey estimates there were 1.7 million shooting days in the UK in 2012/13. Across all shooting types, the average number of shooting participants is six.

Shooting is also great for spectators. Providers reported that the average driven shooting day attracted ten non-shooting spectators in addition to beaters and pickers up. A clay shooting day attracted eight spectators on average and target shooting two spectators per shooting day.

Target shooting is a popular sport. Of those participants who spent more than 40 days a year shooting, more than a quarter were involved in target shooting with airguns.

It's estimated there are 1.4m 'Gun days' target shooting with airguns and 83,000 people who take part in target shooting with a full-bore rifle.



“ Shooting providers recorded £3.5m of charitable donations in 2012/13 ”



CASE STUDY – **An Exmoor shoot**

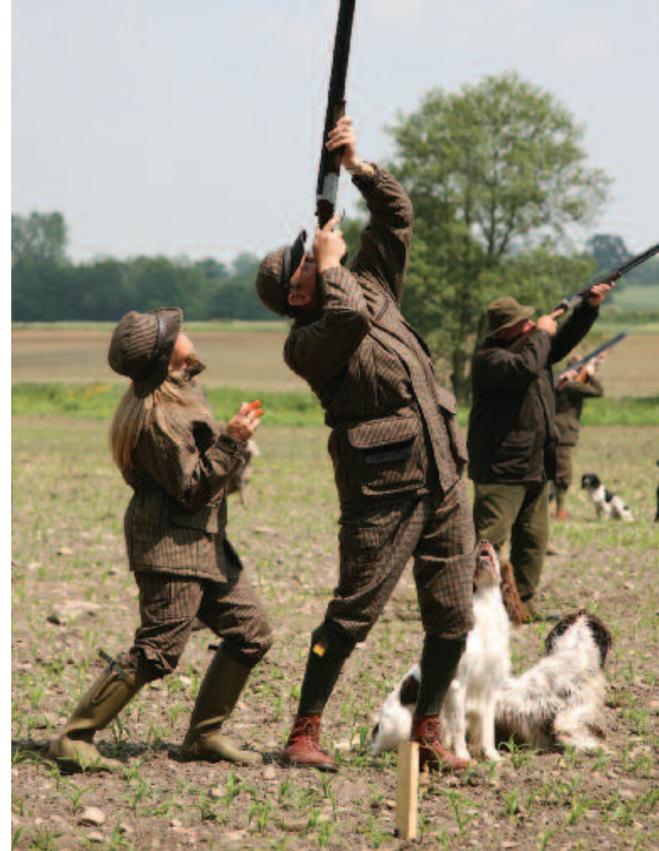
This small syndicate shoot is made up of about 20 farmers and friends. It's a “friendly and informal shoot” of some 40-years standing that covers 2,000 acres of mixed habitat – pasture, forestry and arable – where the land is jointly owned by local farmers and the Forestry Commission. The steep-sided valleys within the shoot provide excellent pheasant shooting for 20 days a year.

The members shoot about 30 birds per day on average which are all taken home to be eaten. In the rare event that there's a surplus it's given away to family and friends.

Everyone mucks in and helps with the day-to-day running of the shoot. Each member has their own particular skills but they all pool resources when required. There is also regular cooperation with neighbouring shoots – with predator control, for instance.

“ Everyone mucks in and helps with the day-to-day running of the shoot ”

The experience and integration of the syndicate members provide important social benefits to allow skills, ideas and practices to be shared and exchanged. One member said they all “enjoy the way of life” and the joint activities – especially the “after-shoot suppers”. The syndicate often enlists the help of volunteers, usually family or friends of members – and there are strong links with local social and community groups. For instance, the shoot donates a day's shooting to the local churches which, when auctioned, can add up to £300 to their funds.





SHOOTING IN THE UK

In the UK shooting takes three principal forms using shotguns, rifles and airguns:

- **live quarry shooting, including pest control**
- **clay pigeon shooting**
- **target shooting**

The survey considers any organisation or, in a great many cases, individual that performs a service that gives rise to opportunities for shooting to be a 'shooting provider.'

Most providers of live quarry shooting offer more than one type, generally 'driven' game but sometimes also less formal types of shooting, such as 'walked-up' and pest control.

Live quarry shooting can be provided in various ways. A small group may form a syndicate to rent



the shooting rights over a piece of land – a club may perform a similar function – or an individual may reach an agreement directly with a landowner. Or landowners may run shoots themselves, either letting days on a commercial basis or paying an agent to take on this role.

Many shoots are arranged on an informal basis where the landowner simply invites guests, family and friends to shoot over the property.

Coastal wildfowling is typically carried out through clubs that may shoot over large areas of estuary and shoreline – much of which is specially designated for its conservation value. The shooting provider in these cases is taken to be the club

manager or secretary.

Live quarry shooting is offered by 72% of providers. The most common forms are driven game and pest/predator control, offered by over half of the providers.

After live quarry, clay pigeon shooting is the most frequently-provided form of shooting.

In addition to the large number of established, commercially run clay shooting grounds and clubs – which typically include coaching facilities and are available to people of all abilities – there are large numbers of smaller informal clay pigeon shoots that are arranged on an occasional basis by groups of friends, clubs or syndicates.

It is common for a target shooting provider to offer multiple types of shooting at a single site and the survey also covered target shooting with rifles and airguns. These sports are largely conducted on established ranges, often managed by clubs.

A total of 27% of respondents to the provider survey said that their site was (or included) a shooting range. Among these, 64% included an indoor range and 72% included an outdoor range. 36% provided both. Among the rifle ranges surveyed, 44% were privately owned, 10% were owned by a local council and 17% by the Ministry of Defence. The majority of the remainder were owned by clubs and/or their members.

THE SCALE OF SHOOTING

It is estimated that there are a total of 70,000 providers of shooting opportunities in the UK, of which 47,000 offer live quarry shooting. Providers of avian and mammalian pest control are the most numerous, offered by 41,000 and 29,000 providers respectively.

They are typically offered as part of site management alongside other types of live quarry shooting, of which driven game (23,000 providers) and walked up game (21,000) are the most common. Clay pigeon shooting is offered by 24,000 providers and is the most common form of shooting other than live quarry shooting. Many of these shooting opportunities are of the small, informal type.

On average each shooting provider provided 24 days of shooting opportunities in 2012/13, resulting in 1.7 million shooting days. Multiplying the number of days by the number of people taking part on each day gives the number of 'Gun Days'. There were 11 million Gun Days in total.

These included:

Live quarry shooting	3.6 million Gun days
Clay pigeon	3.9 million Gun days
Target: airgun	1.4 million Gun days
Target: small bore	1.3 million Gun days
Target: full bore	600,000 Gun days
Target: black powder	150,000 Gun days

It is also important to realise that participants are typically involved in four different kinds of shooting. Clay pigeon shooting is the single most popular discipline, practised by two-thirds of all shooters but this is surpassed by live quarry shooting when all types of live quarry are put into a single category (79%). Just over a half of all participants shoot driven game and pest birds – especially woodpigeons and crows.

It is worth noting that since the survey was largely confined to members of shooting associations, it is likely that 600,000 participants is an underestimate of the true number of shooters. The number of informal participants shooting live quarry with airguns, for instance, is estimated at 40% of the 4 million owners – that's 1.6 million shooters – many of whom do not belong to any of the main shooting organisations.

Also it is known that young shooters are underrepresented in the survey findings; many under 17 could not be included in the survey because of their age and associated survey sampling requirements.

However, young people are an active and important part of the shooting community – for example, BASC has some 7,000 young members – and there is substantial evidence from providers and case studies that many young people are involved in shooting, for instance through cadet forces, the Scouts and schools. Competitions involve hundreds of young people each year.





CASE STUDY –

Shooting range – Bisley

Set up in the late 1890s, this shooting range in the south east of England is internationally recognised as the home of target shooting. Covering 4,000 acres, the site features a dozen or so different ranges – including two large sporting clay layouts and a complex with Olympic level facilities.

Owned largely by the National Rifle Association (with a small area owned by the National Small-Bore Rifle Association), the venue regularly sees around 1,000 shooters in action at weekends – sometimes reaching the 2,000 mark when the range hosts major competitions.

The shooting ground is a substantial employer in the area with around 170 full-time and over 200 part-time workers on site. The core of professional staff is supported by several hundred volunteers.

Plans are in place to increase and upgrade the on-site accommodation to cater for the increasing number of visitors. In the 12 months of our survey, the site handled an average of around 7,500 visitors. The estimate of potential visitors for 2014 is between 9,000 and 10,000 shooters.

The shooting range is also a conservation success story. The majority of the 4,000-acre site has European recognition as an environmentally sensitive area. There is a rich and diverse plethora of wildlife in the area because of shooting and not despite shooting.

“ There is a rich and diverse plethora of wildlife in the area because of shooting and not despite shooting ”

WHERE DO PEOPLE SHOOT?

Most people shoot in their home area but also travel. For instance, 38% of those who shot in Wales had also shot in the West Midlands.

The most popular areas for shooting were the southeast and southwest of England, and Scotland. There was significant travel to Scotland for shooting both from the home countries and from abroad. When shooters travel they need to spend on ammunition, clothing, shooting accessories, fuel, food and accommodation, which all contribute to the economic benefits of shooting in the country.

Fifty four per cent of providers said their shooting sports activity led to visitors staying in the locality overnight.





MEAT FOR THE TABLE

Ninety seven percent of all edible quarry shot was destined for human consumption; with 62% consumed by those who shoot or provide shooting, and 35% used elsewhere, for example it was likely to have been sold to a game dealer or restaurant. Three per cent was deemed unfit for the human food chain.

Among those surveyed, gamebirds and venison were the most popular meats, with 84% and 78% respectively eating them in-season. Seventy three per cent of respondents ate woodpigeon and 68% rabbit. Those surveyed commonly reported that game meat had become more popular: there was greater awareness of game among the public, it was appearing on restaurant menus, in recipe books and on television, and was becoming more available outside specialist retailers (e.g. in supermarkets).



The UK picture

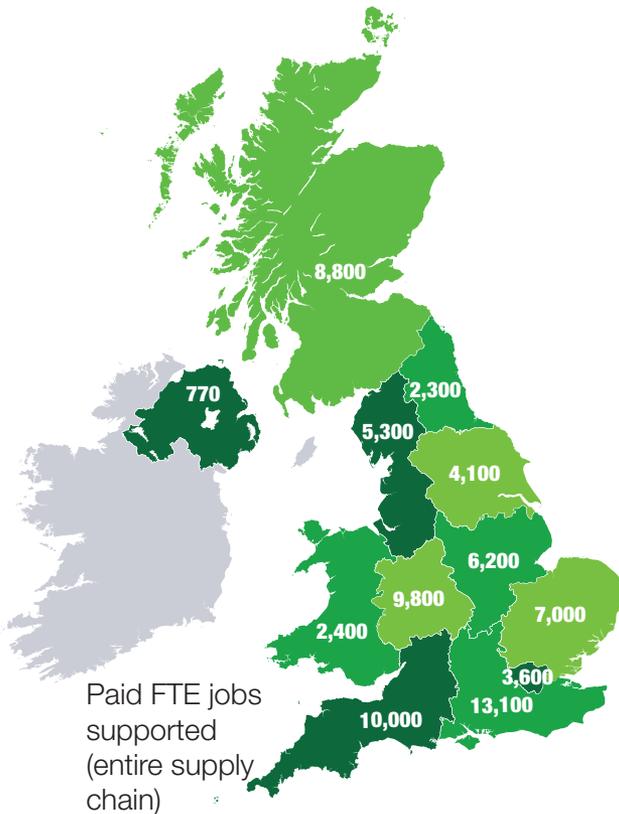
At least 600,000 people in the UK shoot clay pigeons, live quarry, or targets. Existing industry data also shows that at least 1.6m people shoot live quarry with an airgun. The majority of survey respondents were male and over the age of 40 years. Half of the respondents shot at least 20 times a year.



	Gun Days	Providers	Participants [†]	Area influenced (ha)	Conservation labour (FTE)	Paid FTE jobs supported (entire supply chain)	First round supplier spend by providers and participants (£m)	Total GVA supported (£m)
South East	2,300,000	14,000	200,000	1,800,000	2,400	13,100	330	370
East	1,200,000	6,500	100,000	820,000	1,100	7,000	150	180
Greater London	380,000	1,500	22,000	240,000*	280*	3,600	68	140
South West	1,500,000	10,000	170,000	1,800,000	2,200	10,000	230	250
West Midlands	1,100,000	8,500	95,000	1,300,000	1,600	9,800	220	240
East Midlands	1,500,000	7,100	79,000	830,000	1,100	6,200	140	150
Yorkshire and the Humber	590,000	4,000	87,000	810,000	1,000	4,100	91	120
North West	800,000	4,800	64,000	890,000	990	5,300	130	160
North East	290,000	2,100	44,000	400,000	480	2,300	46	57
England	9,600,000	59,000	550,000	8,800,000	11,000	61,000	1,400	1,700
Wales	450,000	2,900	76,000	380,000	490	2,400	64	75
Scotland	640,000	7,100	120,000	4,500,000	3,900	8,800	180	200
Northern Ireland	210,000	740	9,800	69,000	67	770	19	28
UK	11,000,000	70,000	600,000	14,000,000	16,000	74,000	1,700	2,000

*Includes estates outside London, owned by providers living in London

†Participants can shoot in more than one area



Most participants took part in more than one type of shooting, with clay pigeons being the most popular (67%), followed by driven game at 55% and avian pest species – mainly woodpigeons – at 54%.

The scale, and economic significance, of shooting varies from area to area, with the largest effects being found in the southeast and southwest of England and in Scotland. It comes as no surprise that the majority of people shot in the area in which they live, but it was common for shooters to travel for particular types of shooting, red deer for example. In Scotland, for instance, 97% of those that live there shot there, and it was also the destination of choice for shooters visiting the UK from abroad. Around 15% of those living in England travelled to Scotland to shoot within the period of the survey.

As well as shooters providing a significant boost to the local and national economies, the contribution to conservation is impressive. Shooting providers influence the management of around two thirds of the area of the rural land in the UK and spend nearly £250 million per year on conservation, habitat and wildlife practices specifically for shooting.



Edited by Jeffrey Olstead and Steve Moore.

Design by Alistair Kennedy

Photography: Don Brunt, Celine Peniston-Bird, Riflephoto.com, Nick Ridley, Northeastwildlife.co.uk, BSA, Laurie Campbell, Richard Brigham, Rob Douglas, Clare Ives, Steve Moore, Kate Ives, Richard Faulks, IStockphoto.com

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The study has benefited greatly from the co-operation of all of the partner organisations:

British Association for Shooting and Conservation (BASC),

British Shooting Sports Council (BSSC), CLA, Clay Pigeon Shooting Association (CPSA), Countryside Alliance,

Game Farmers' Association (GFA), GunsOnPegs, Gun Trade Association (GTA),

Moorland Association (MA), National Gamekeepers' Organisation (NGO), National Rifle Association of Great Britain and Northern Ireland (NRA)

National Small-Bore Rifle Association (NSRA), Scottish Land & Estates (SL&E) incorporating the Scottish Moorland Group (SMG)

Scottish Enterprise (SE), Scottish Natural Heritage (SNH), Scottish Country Sports Tourism Group (SCSTG)

We are also grateful to the Association of Professional Shooting Instructors and the United Kingdom Practical Shooting Association for providing data and distributing online survey invitations.