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SPORTING ESTATES
and
RECREATIONAL LAND USE
IN THE HIGHLANDS AND ISLANDS
of
SCOTLAND

NOVEMBER 2002

Report compiled by:
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PREFACE

This report contains the key findings of a ESRC funded study into Highland Sporting Estates. It is not a comprehensive account of the research and further papers are due to be produced that will analyse the results in greater depth.

Two annexes are included. The first outlines the way in which sporting estates were identified and selected for study. The second contains a report, prepared for the ESRC, on outreach activities, impacts of the study and thoughts on future research.

Any readers who are interested in finding out more about the research and it's methodology are invited to contact the research team: -

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EXECUTIVE SUMMARY

The research has provided a contemporary profile and analysis of the sporting estate in the Highlands and Islands of Scotland and has focussed on the following issues:

- location, distribution and characteristics of estates and their owners;
- motivations, attitudes and worldviews of owners and managers;
- management regimes
- economic performance and role in local economy;
- relations and interactions with public policy.

The Contemporary Sporting Estate

The study population of 218 estates covers 4,550,327 acres of land in the Highlands and Islands – 43% of all privately-owned rural land in the region and 27% of all privately-owned land in Scotland. Of these:

- 39% are held by legal title in the name of an individual or individuals
- 23% are held by trusts
- 21% by companies registered in the UK
- 16% by companies registered offshore

- 50% have been owned by the current owner or their family for 25 years or less
- 20% for between 26 and 50 years
- 30% for over 50 years

- 66% are owned by absentee-owners (defined by principal place of residence).

- 39% of estates were obtained by inheritance
- 61% of estates were purchased.

Motives and Management

The survey provided detailed information on the motives and attitudes of owners of sporting estates (Table 1).

Table 1

REASON	Very important (%)	Quite or very important (%)
A place for family and friends	72	95
Sporting activities	65	97
Maintain employment	59	97
Family continuity	54	78
Conservation	52	93
Non-hunting recreation	33	86
Livelihood	20	36
Capital investment	18	52
Entertaining business associates	3	15

Respondents were invited to state how they viewed their estate from a series of options (selecting all that applied). Their response was as follows:

Table 2

A place to enjoy shooting and other activities	74%
A commercial enterprise	52%
A quiet retreat from working life	49%
Main family residence	27%

Despite the overwhelming focus on personal issues of family and recreation, it is notable that just over half of respondents are motivated to purchase sporting estates as a capital investment and view their estate as a commercial enterprise.

Economic Performance

The survey results confirm popular assertions that sporting estates are unprofitable. Only 16% of estates report being always or usually profitable enterprises. By contrast 64% of estates report being usually or always unprofitable. Twenty one percent of estates report variable profitability. Ninety percent of respondents are attempting to increase revenues from sporting activities.

Due to the sensitive nature of financial information, owners were inhibited in providing data on annual revenue and income. However, analysis of the Accounts produced by a randomly selected group of the 45 estates owned by UK registered companies showed an overall average annual losses of £39,531.

The capital value of estates is quite or very important to 52% of respondents (Table 1). Of 15 estates that have been sold at least twice since 1960, the average capital appreciation over the sample was 5% per annum in real terms.

The Changing face of the Sporting Estate

Owners have strong views on the range of public policy issues affecting sporting estates. On public access, 22% of respondents stated that “public access is encouraged”, 66% that “public access is tolerated” and 5 % that “public access is discouraged”. Six percent gave no response.

Owners on the whole feel threatened by access legislation, land reform legislation and issues such as gun and fox control. Even hillwalking, which most owners appear to tolerate, is perceived as a serious or minor threat by 81% of respondents.

Sporting estates nevertheless remain places where the owner and family can enjoy sport hunting and relaxation. Evidence exists, however, of greater attention being paid to minimising the costs associated with running such properties. In an increasing number of cases, estates that in the past would have been regarded as traditional sporting estates, are now run as profitable rural businesses.

Conclusions

Evidence from this research suggests that the modern Highland sporting estate is a relatively homogenous phenomenon with owners subscribing to a core set of values, ideas and beliefs that can be characterised as follows:

- 15-20,000 acres with a hunting lodge
- 8.5 full-time equivalent employees
- owned by a man of significant but not immense wealth who lives elsewhere and owns land elsewhere
- managed as a place to enjoy hunting and family holidays
- costing a 5-figure sum annually to balance the books.

The future of the Highland sporting estate appears to be secure for the present. There appears no great appetite among politicians for significant (the Scottish Executive has, for example, even fought shy of re-introducing sporting rates). However, owners and managers feel increasingly obliged to participate in wider debates about the role and legitimacy of the sporting estate phenomenon.

Public agencies meanwhile, maintain a somewhat ambivalent attitude towards the sporting estate phenomenon. On the one hand, they express a degree of frustration at not having the range of policy instruments available to them in other sectors such as agriculture. On the other hand, however, they express severe reservations about advocating any more interventionist an approach, conscious, it appears, of the political difficulties in doing so.

This study suggests that the role and purpose of Highland sporting estates remains overwhelmingly focussed on the consumption of leisure by external individuals. Such a role, however, no longer constitute the exclusive motives of owners, many of whom are engaged in efforts to improve profitability, diversify, and engage with wider local and national interests.

This study has provided some evidence that, if one wishes to run a sporting estate profitably, that it is possible to do so by reducing the cost base, promoting diversification and securing higher levels of rental income. The fact that few owners take this approach is merely a reflection of the fact that if one wants to run a profitable business there are better alternatives and that in any case sporting estates as currently organised are owned for the *consumption of leisure* rather than the *marketing of leisure*.

FULL REPORT OF RESEARCH ACTIVITIES AND RESULTS

BACKGROUND

Sporting Estates constitute a large part of the land area of the Highlands and Islands.

The role and status of sporting estates have long been part of a wider debate about the ownership and use of land. Despite such debate, very little is known about the status and character of such landholdings, the motives and outlook of their owners or the management and economics of the properties.

In the absence of a better understanding of the sporting estate phenomenon, popular perceptions have developed of an elitist social formation with poor linkages to rural society or the rural economy. Countering this, from the landowning perspective, has been a discourse emphasising the economic value to fragile rural economies.

Aside from some regional studies of landownership in general, macroeconomic studies of field sports, two enquiries into the management of red deer, and preliminary work done by the authors¹, there is no previous work on this topic.

The study set out to better understand the sporting estate phenomenon by making enquiries from within the sporting estate world as well as from documentary sources. It is relevant to stress that the research has not concerned itself with the moral or ethical issues associated with hunting but purely on the dominant framework within which the hunting economy has developed in the Highlands and Islands over the past 150 years.

¹ Jarvie, G., Jackson, L. and Higgins, P. (1997) Scottish Affairs, Sporting Estates and the Aristocracy. Scottish Affairs, 19, pp.121-40.

Wightman, A. and Higgins, P. (2000) Sporting Estates and the Recreational Economy in the Highlands and Islands of Scotland. Scottish Affairs, 31, pp. 18-36.

Wightman, A., Higgins, P., Jarvie, G. and Nicol, R. (2002) The Cultural Politics of Hunting: Sporting Estates and Recreational Land Use in the Highlands and Islands of Scotland. Culture, Sport, Society, Vol.5, No.1 (Spring 2002), pp.53-70.

Wightman, A. & Higgins, P. (2001) Sporting Estates and Outdoor Recreation in the Highlands and Islands of Scotland. In: M. Usher (Editor) Enjoyment and Understanding of the Natural Heritage. Edinburgh: Stationery Office, 171 - 176.

OBJECTIVES

The overall aim of the research was to:

- develop a better understanding of the sporting estate phenomenon and explore alternative models to the sporting estate capable of delivering social, economic and environmental benefits.

The particular and subsidiary objectives were to:

1. Characterise and document the contemporary range and nature of sporting estates in the Highlands and Islands
2. Assess the financial performance of sporting estates by gathering information on their internal and external economics (revenue, costs, capital performance, tax status and management of hunting) by survey, case study and modelling
3. Review public policy towards sporting estates by surveying, documenting and analysing the attitudes, and policies of public agencies towards them
4. Review attitudes and values in the private sector (sporting estate owners, estate agents and managers, employees, local people) opinion formers, politicians and environmentalists towards sporting estates.

Objective 1 Fully Achieved

Success was achieved in the selection of sporting estates for the postal survey, in the response to the survey and in the factual and qualitative data that was obtained. This was enhanced by the follow-up interviews and case studies. See the Methods and Results sections.

Objective 2 Achieved

This was addressed through the postal questionnaire, documentary research and analysis of Annual Accounts lodged in Companies House. Difficulties in achieving this objective related to the reluctance of owners and managers to talk about financial matters and in the unsatisfactory nature of accounts filed in Companies House (most estates are obliged only to submit abbreviated accounts).

We were well aware of these difficulties at the outset and it was also signalled as potentially problematic by one of our referees. There are obvious difficulties in obtaining sensitive personal business information, difficulties which are compounded in some cases by obscure offshore legal arrangements and particular tax-planning objectives.

Nevertheless, we are pleased that we have been able to derive some useful data and to arrive at useful conclusions on the basis of the evidence we did obtain - see the Results Section.

Objective 3 Achieved

This has been partially achieved through both documentary analysis and feedback from interviews.

Objective 4 Fully Achieved

This has been achieved through both documentary analysis and the analysis of evidence from interviews and the focus group - see the Methods and Results sections.

Overall Aim

We believe we have been *successful in achieving this aim*. Indeed, the problems in Objective 2 have been more than compensated for by the success in building an in-depth profile and analysis of owners' attitudes and motivations

The level of access granted and the information gathered from respondents has been a significant contributor to this and has exceeded our expectations. The resulting data is certainly the most extensive record of its type ever gathered and is an excellent basis upon which to undertake further analysis and research and to make our findings available to the wider public.

METHODS

The methods employed in this study were conventional and well established empirical research techniques (documentary analysis, postal questionnaire, case studies, focus groups and semi-structured interviews). The combination of these techniques, the basis upon which estates were selected and the number and range of respondents represents an important and novel contribution to the field.

Particular to this research were issues of the political sensitivity of the topic and the possible reluctance of sporting estate owners and managers to participate. To overcome this, we set up an advisory panel and made contact with key stakeholders at an early stage. We informed them of the nature and purpose of the research and actively sought their cooperation.

A study population of 218 sporting estates was drawn up by building and developing upon extensive previous data collated by Wightman² (see Annex 1).

Documentary research and analysis

Research was undertaken on the 218 estates to ascertain their ownership and the characteristics of their owners. This research was based upon Wightman's existing data supplemented and updated by research in the National Archives of Scotland, Companies House and various other sources.

Postal Questionnaire

A pilot postal questionnaire was prepared and tested. Results suggested that enquiries on financial matters might provoke a reluctance to participate due to concerns over confidentiality and motives. It was also evident that separate questionnaires would be needed for owners and managers.

² Andy Wightman is an independent writer and researcher who was employed as part of the research team. His previous research on patterns of landownership was central to the research by way of enabling the collation of data on landowners. It was also potentially problematic since he is well known among landowners and, as a consequence, they might have been wary of participating. Because of this, Wightman played a low key role during the first year of the study.

A comprehensive postal questionnaire was then designed. Separate editions were prepared for owners, owner-managers, managers and managers for owners. An example is attached in Annex 2. The forms identified the respondent for the purposes of undertaking aggregate analysis. Respondents were assured of confidentiality.

In order to ensure the greatest degree of participation in the postal survey and to allay any suspicions that respondents might have, we attempted to make personal contact by phone with all the landowners we intended to survey. Of the 218 estates, we had insufficient contact details for 24. A further 22, following initial phone contact, did not wish to take part. Questionnaires were sent to the remaining 172 owners. Contact had been made with 138 of these and a further 34 were mailed to owners for whom we contact details but whom we had been unable to speak to. (See Annex 1)

Of the 172 questionnaires mailed, we received 85 responses representing:

- 49.4% of estates mailed
- 1,841,152 acres of land
- 47.8% of the acreage of estates mailed
- 17% of the privately-owned rural land in the Highlands and Islands.

Case studies

The survey was followed up by a series of nine case studies involving in-depth interviews with estate owners and background research.

Focus Groups

A focus group was held in convened in Edinburgh.

Semi-structured interviews

Additional interviews were conducted with eight senior figures in estate management, public policy and land agency.

RESULTS

The research has provided a contemporary profile and analysis of the sporting estate in the Highlands and Islands of Scotland. In particular it has focussed on the following issues

- location, distribution and characteristics of estates and their owners;
- motivations, attitudes and worldviews of owners and managers;
- management regimes
- economic performance and role in local economy;
- relations and interactions with public policy.

The Physical and Cultural Geography of Highland Sporting Estates

This section of the report draws primarily on documentary research of the whole study population (218 estates).

There is no official definition of what constitutes a sporting estate. For the purposes of this study definitions were developed and are outlined in Annex 1. Of these, 218 were selected for investigation, and documentary research was undertaken to ascertain their key. Information was derived from public records and existing unpublished research by Wightman developed prior to the study.

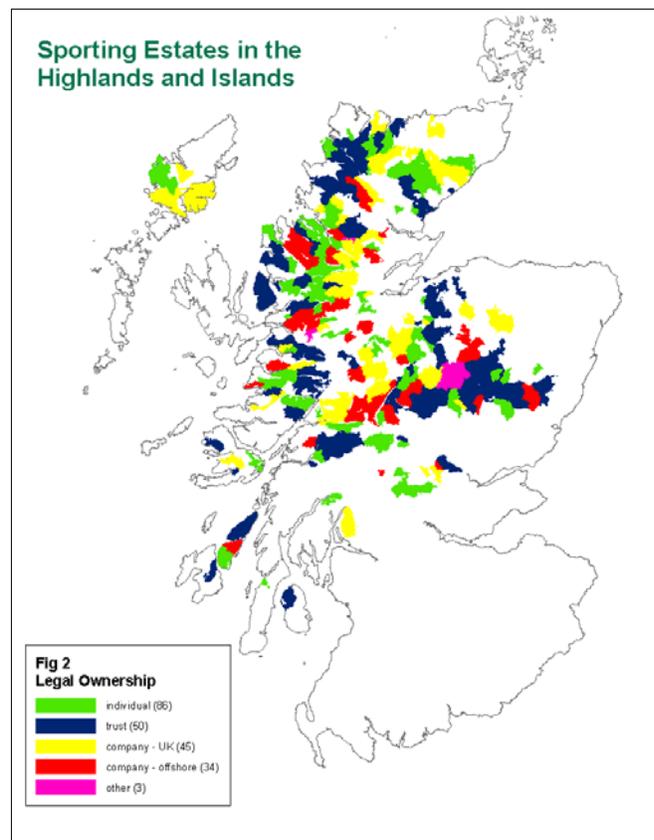
These 218 estates cover 4,550,327 acres of land in the Highlands and Islands – 43% of all privately-owned rural land in the region. The mean size is 20,873 acres.

Ownership characteristics

Of the total (218) estates, 39% are held by legal title in the name of an individual or individuals, 23% are held by trusts, 21% by companies registered in the UK, 16% by companies registered offshore and 1% by other (Fig. 2).

Of the total (218) estates, 82% of sporting estate owners are male, 6% are women and 9% are in family ownership (additional 3% are charities and institutions).

Of the respondents, 93% are members of the Scottish Landowners' Federation, 78% of the Game Conservancy and 74% of the Countryside Alliance.

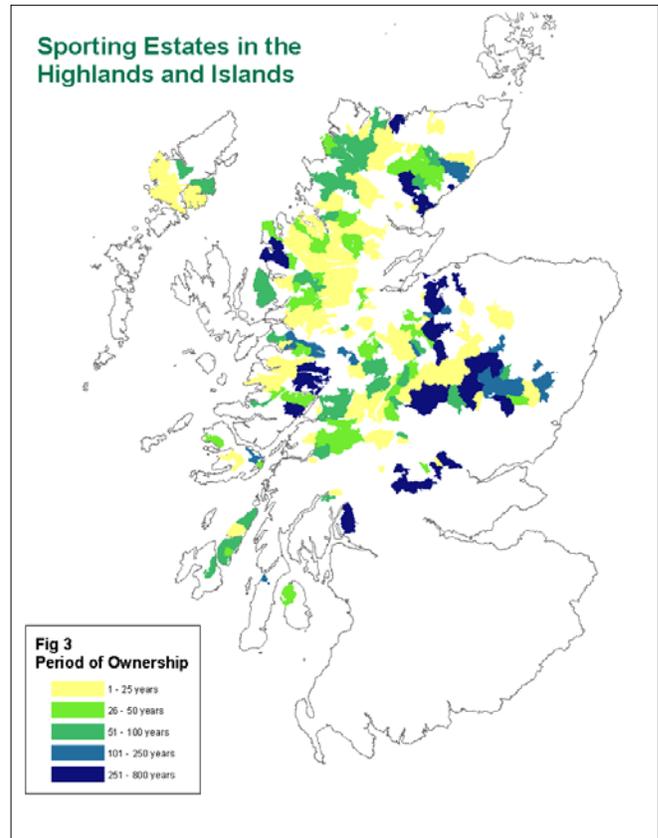


Period of Ownership

Of the total (218) estates, 50% have been owned by the current owner or their family for 25 years or less, 20% for between 26 and 50 years and 30% for over 50 years with 14% having been owned for over 100 years (Fig 3.)

Of the respondents, 82% have owned their estate for less than 20 years (although it may have been held by their family for longer).

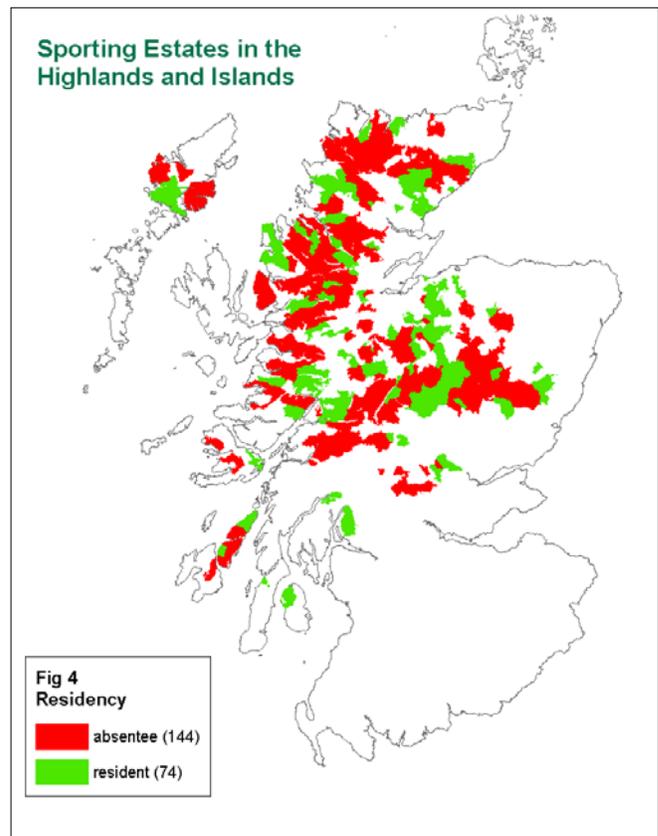
For 68% of respondents to the survey, this is not their first experience of owning land and 63% of respondents also own land elsewhere (principally in the UK).



Residency

Of the total (218) estates, 66% are owned by absentee-owners (Fig. 4) (defined by principal place of residence). This is broadly consistent with the survey sample where 27% of respondents are resident on their estate.

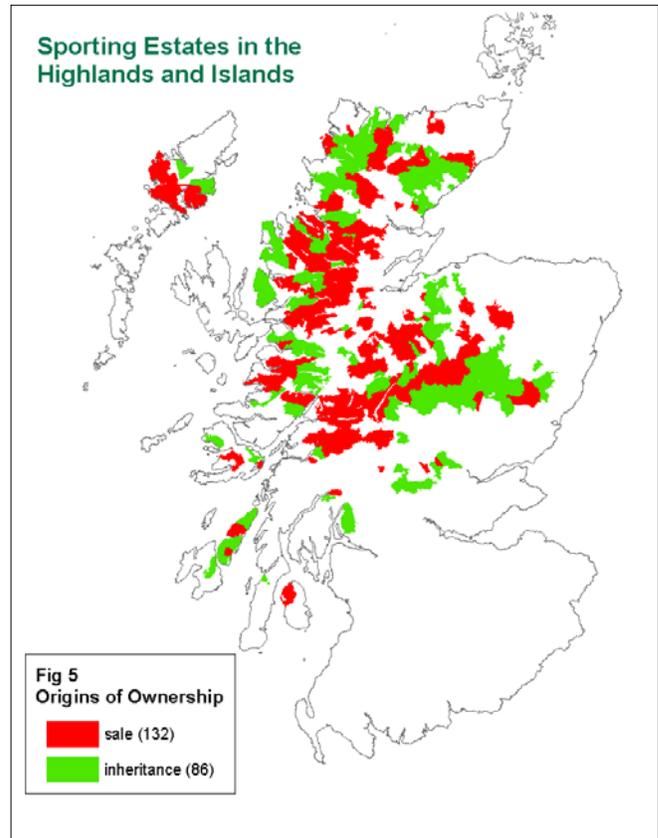
Of the respondents, 74% of owners (absentee and resident spend at least 2 months per year resident on the estate although only 31% spend 6 months or more and only 9% spend over 10 months. The main reasons cited for spending less than 10 months were work commitments (87% of respondents) and family reasons (44%).



Origins of Ownership

In terms of how the current owners obtained their properties, 39% of the total (218) estates were obtained by inheritance and 61% of estates were purchased (Fig. 5).

Of the respondents, 49% of respondents obtained ownership via inheritance. The remainder obtained it by sale (32% by purchase on the open market and 18% by private sale)



Motives and Attitudes

The following four sections draw primarily on results from the postal questionnaire.

The survey provided detailed information on the motives and attitudes of owners of 85 sporting estates. The most common reasons cited for ownership were:

Table 1

REASON	Very important (%)	Quite or very important (%)
A place for family and friends	72	95
Sporting activities	65	97
Maintain employment	59	97
Family continuity	54	78
Conservation	52	93
Non-hunting recreation	33	86
Livelihood	20	36
Capital investment	18	52
Entertaining business associates	3	15

Respondents were invited to state how they viewed their estate from a series of options (selecting all that applied). Their response was as follows:

Table 2

A place to enjoy shooting and other activities	74%
A commercial enterprise	52%
A quiet retreat from working life	49%
Main family residence	27%

Despite the overwhelming focus in terms of motives on personal issues of family and recreation, it is notable that just over half of respondents are motivated to purchase sporting estates as a capital investment and view their estate as a commercial enterprise.

Management

When asked to rank the objectives of management on their estate from a series of options, owners ranked as first or second maximising shooting quality (60%), minimising losses (57%) and maintaining employment (65%).

On 74% of estates, paying clients shot red deer stags in 2000. In 53% of cases they were responsible for shooting over 20 animals. However, this is not to the exclusion of the owner who continues to participate in sporting activities. In the same season, 68% of owners shot red deer. Only 41% of employees did so.

Owners participate less in the hind stalking with 49% shooting hinds. On 50% of estates, paying clients are involved and in 82% of estates, employees are involved. Forty-five percent of estates noted no change in the numbers of red deer taken by paying clients and 35% of estates report a steady increase. Similar figures are reported for other species of deer.

Sixty-five percent of estates use their shooting lodge to accommodate paying guests and 78% use one for their own accommodation. Thirty-nine percent of estates also have self-catering accommodation available whilst 24% of estates use the shooting lodge for non-sporting tourism and 36% of estates are involved in non-sporting self-catering lets. Thirty percent of estates have created new tourist accommodation in the past five years.

Seventy-three percent of estates employ between one and twenty staff with the average number of full-time equivalent jobs being 8.5 per estate.

Economic Performance

The survey results confirm popular assertions that sporting estates are unprofitable. Only 16% of estates report being always or usually profitable enterprises. By contrast 64% of estates report being usually or always unprofitable. Twenty one percent of estates report variable profitability. Of sporting activities, red deer stags are reported as most frequently profitable (usually or always profitable in 45% of estates). Fishing, farming, grouse shooting and hind stalking are always or usually profitable in between 32% and 38% of estates. Ninety percent of respondents are attempting to

increase revenues from sporting activities.

Due to the sensitive nature of financial information, owners were inhibited in providing data on annual revenue and income. However, analysis of the accounts produced by a randomly selected nine estates of the 45 estates owned by UK registered companies provided an indication of their trading position.

Of the nine selected estates, seven made losses averaging £131,570 and two made profits averaging £12,124 resulting in an overall average loss of £99,638. Losses ranged from £11,121 to £580,496. Excluding one outlier³ the overall average loss is £39,531. This is consistent (though rather higher) than typical losses reported by various informants of £10,000 to £40,000.

The capital value of estates is quite or very important to 52% of respondents (Table 1). An analysis was carried out of the capital values of 15 estates that have been sold at least twice since 1960. Of these estates, 13 appreciated in value by between 0.86% and 24.07% per annum in real terms. The remaining two depreciated by 1.93% and 4.54% respectively. The average capital appreciation over the sample was 5% per annum in real terms. In contrast to popular opinion among critics of the sporting estate, however, there is no evidence that owners actively maintain high populations of game (particularly red deer) with the intention of maximising capital values (although there may be many other reasons why they would do so – not least the fostering of a bountiful game resource).

Public Policy Issues

Owners have strong views on the range of public policy issues currently affecting sporting estates. We asked them about these. On public access, owners were asked about their general approach and about specific recreational activities.

Asked to choose which statement most closely corresponded with the estate's approach, 22% of respondents stated that "public access is encouraged", 66% that "public access is tolerated" and 5% that "public access is discouraged". Six percent gave no response.

Asked under what circumstances various recreational activities should take place on the estate, the overwhelming majority of owners felt that there should be restrictions either in terms of the time of year, certain areas or in special circumstances. The only two activities that more than 10% of owners were happy to see take place anywhere and anytime were hillwalking (24%) and guided nature walks (13%). Few owners (1%) felt that hillwalking should not take place at all. Rather more felt that canoeing (49%), cross-country skiing (40%) mountain biking (64%) and camping (36%) should not take place at all.

It was clear that owners, on the whole feel threatened by access legislation, land reform legislation and issues such as gun and fox control. Even hillwalking (which

³ This outlier is a £580,496 loss that relates to an estate owned by a particularly wealthy individual through a company which is wholly owned by a foreign parent. This loss represents 63% of the total losses of the seven.

most owners appear to tolerate) is perceived as a serious or minor threat by 81% of respondents.

On the whole, owners appear more relaxed about environmental policy (although suspicious of conservation bureaucracy) and see themselves as custodians of the environment

The Changing face of the Sporting Estate

This section draws on evidence from case studies, interviews and focus groups as well as the postal questionnaire.

Sporting estates remain places where the owner and family can enjoy sport and relaxation. Evidence exists, however, of greater attention being paid to minimising the costs associated with running such properties. Many estates, for example now have their own websites⁴.

Even among those owners who purchased estates, issues such as family continuity is regarded as important suggesting that most owners see their property as a long-term investment. This is borne out by relatively low turnover rates and the high proportion of estates (44%) that have been in the same family for over 50 years.

Owners are on the whole conservative and traditional in their outlook and not open to new opportunities although this is changing. In an increasing number of cases, estates that in the past would have been regarded as traditional sporting estates, are now run as profitable rural businesses. This remains a modest phenomenon but a notable trend from the situation even 10 years ago when such commercial activity was much less prevalent.

Threats are perceived in everything that would make sporting activities more problematic. Owners remain highly influential in management and the traditions and cultural history of the Highland Sporting estate are important influences in the owners' view of how such places should be managed. Owners have a profound sense of their own pivotal role in the rural economy frequently citing the provision of employment as dependent on their continued existence. Interviews with landowners also revealed the influence of, and trust placed in, stalkers and game-keeping staff. Such staff have often been associated with the estate longer than the owner or manager and they play an important role in maintaining traditional management practices.

Attitudes to forms of outdoor recreation other than hunting suggests a tolerance of activities which are most difficult to resist such as hillwalking (long tradition of public access and various policy initiative designed to promote harmony). Those activities, however which are perceived as more obtrusive and where the legislative context is perceived to be more firmly weighted in favour of the landowner (camping/canoeing/mountain biking), appear to be resisted.

The impression comes across of a constituency ill at ease with the more open scrutiny and new legislation that have emerged following the establishment of the Scottish

⁴ See for example, www.corroul.co.uk and www.ardverikie.com

Parliament. Frequent references were made to the Parliament and its failure to understand rural issues/landownership/hunting etc. Even those respondents who are relatively new to sporting estate ownership appeared uncomfortable with impending changes and gave no indication of being more responsive than long-standing owners.

Owners and managers made frequent reference to the interference by Government agencies and non-governmental bodies such as the RSPB, which, in general terms, they resent. They feel their role as custodians of the environment is not fully appreciated and that such organisations suffer from too narrow a focus. In particular there is a widespread belief that Government and politicians had no real knowledge or understanding of how estates worked and of the role of landowners (provision of jobs and stewardship of the environment were frequently cited) in the rural economy.

One of the leading agents argued that “if you look at it in terms of pounds shillings and pence - in terms of an investment - there is probably no logical reason to own a sporting estate.” This was a widespread response to the question of owner motivation and the economics of sporting estates. It is clear from the research, however, that there is a straightforward logic to the purchase of such places. It is the same logic that applies to the purchase of a holiday home, a yacht or a horse. It is purchased for the pleasure to be derived from it. The price paid reflects the value attached to that pleasure. As the survey makes clear in the case of sporting estates this pleasure is derived from the hunting, from the opportunities for holidays and non-hunting recreation, and from the self-worth derived from environmental management and providing employment.

Land remains a secure form of investment and capital gains, whilst not particularly large, remain satisfactory and whilst not appearing to be as significant as other motives is still regarded as quite or very important by 52% of respondents. Annual revenue deficits of the order of £10-25,000 are, in the circumstances modest costs for the enjoyment to be gained from owning a sporting estate and are not significantly higher in relative terms than the revenue deficits incurred in other forms of recreational investment such as a holiday house or yacht.

Conclusions

The Contemporary Highland Sporting Estate

Evidence from this research suggests that the modern Highland sporting estate is a relatively homogenous phenomenon with owners subscribing to a core set of values, ideas and beliefs.

Agents and managers were insistent that there is no such thing as a typical highland sporting estate. The findings from the survey and from interviews demonstrate, however, that there is, and that it can be characterised as follows:

- 15-20,000 acres with a hunting lodge
- 8.5 full-time equivalent employees
- owned by a man of significant but not immense wealth who lives elsewhere and owns land elsewhere
- managed as a place to enjoy hunting and family holidays
- costing a 5-figure sum annually to balance the books.

Whilst the phenomenon of the sporting estate might be relatively consistent in terms of how it is managed, there is evidence of greater diversity among owners. For example, there are on the one hand, those few individuals of immense wealth who are adopting a diversity of very individual approaches to management and, on the other hand, those of modest wealth who are attempting to diversify and generate new business opportunities to balance the books.

For most owners, however, sporting estates remain a valued asset for the pursuit of leisure. A strong sense of purpose infuses most owner's approaches to estate management and most appear to take seriously obligations to the wider public, to the local community and to the environment. Strong loyalties are felt toward employees, family and their peer group and there is a strong identification with an owner's role as a steward of the environment.

Attitudes and Responses to Public Policy

There is a notable sense of confusion and drift among owners faced with new public policy imperatives. Individuals who, in other ways, are passionate, focussed and committed to their property, suddenly appear threatened and vulnerable and harbour strong feelings of distrust and antipathy toward politicians, government and "single-interest" pressure groups. Conversely, strong affinity is felt towards organisations such as the Scottish Landowners' Federation and the Countryside Alliance – organisations that are relied upon to articulate the worries and fears of owners in a world that has changed markedly from that which pertained before the establishment of the Scottish Parliament.

Managers and agents operating at the national level have, as professionals, a more detached and pragmatic view of the sporting estate and the issues facing it today. They assert on the one hand the validity and importance of the sporting estate (particularly in providing employment) and the economic benefits accruing as a consequence of investment by wealthy patrons. On the other hand they recognise and understand more fully than many owners appear to, the significance of emerging public policy in the field of environment, public access and land reform.

Thus they are happy to be critical of sporting estate owners for not adapting to changing times, to provide leadership by way of advice and ideas, to help improve public relations (particularly locally), to facilitate public access, and to generate more economic activity. Such initiatives are prompted in some cases by competitive advantage (developing expertise, for example, in environmental management). In other cases they appear to be part of a broader concerns to be adopting, as professionals, more progressive management regimes. In a few cases it is as a direct response to the instructions of their clients to do things differently.

The Future

The future of the Highland Sporting Estate appears to be secure for the present. There appears no great appetite among politicians for significant change to the way they operate (the Scottish Executive has, for example, even fought shy of re-introducing sporting rates). However, owners and managers feel increasingly obliged (indeed forced) to participate in wider debates about the role and legitimacy of the sporting estate phenomenon.

Public agencies meanwhile, maintain a somewhat ambivalent attitude towards the sporting estate phenomenon. On the one hand, they express a degree of frustration at not having the range of policy instruments available to them in other sectors such as agriculture. On the other hand, however, they express severe reservations about advocating any more interventionist an approach, conscious it appears of the political difficulties in doing so.

This study suggest that the role and purpose of Highland sporting estates remains overwhelmingly focussed on the consumption of leisure by wealthy external interests but that such interests no longer constitute the exclusive motives of owners, many of whom are engaged in efforts to improve profitability, diversify and engage with wider local and national interests. To the extent that this provides employment without seriously interfering with the wider public interest, their future appears reasonably secure.

So long as there is a market in such places among wealthy individuals, the sporting estate will continue to provide for their leisure demands. If it becomes apparent that there are realistic alternative models available that can both provide hunting opportunities and contribute wider public benefits locally and nationally, then the narrow basis upon which sporting estates are constituted may start to erode.

This study has provided some evidence that, if one wishes to run a sporting estate profitably, then it is possible to do so by reducing the cost base (including for example selling or leasing the shooting lodge), promoting diversification and securing higher levels of rental income. The fact that few owners take this approach is merely a reflection of the fact that if one wants to run a profitable business there are better alternatives and that in any case sporting estates as currently organised are owned for the *consumption of leisure* rather than the *marketing of leisure*.

Annex I - Highland Sporting Estates: definitions, classification and sampling.

In the absence of any official definition or data on sporting estates, the research had to begin with the process of devising a definition, and classifying and selecting estates. This process was facilitated by access to the published and unpublished data held by Andy Wightman⁵. A long list of 436 (the candidate estates) was developed and each estate was then denoted according to the following criteria.

5. Whether the estate (or part of estate) was classified for sporting rates purposes as a deer forest or grouse moor in 1994/95 (the last year sporting rates were in force).
6. Whether the estate was subject to a sporting let from a sporting agent (Finlayson Hughes and Strutt & Parker being the main agents)
7. Whether the estate was listed by G.Kenneth Whitehead in his 1960 book *The Deerstalking Grounds of Great Britain and Ireland*.
8. Whether the estate was listed by George Malcolm in his *The Population, Crofts, Sheep-Walks and Deer-Forests of the Highlands and Islands* (1883).
9. Whether, in any sales particulars held in the Wightman collection (>1500 brochures), the estate was described as a sporting estate.

Candidate states were then classified into one of 5 classes:-

- A. "Classic" sporting estates (Glen Feshie, Ardverikie, Invermark, Corroul etc.)
- B. Estates that score at least 2 of the attributes above and which are either described as sporting estates or popularly regarded as such.
- C. Estates that score 1 or none of the attributes above but which, on the balance of probability are sporting estates.
- D. The remainder of the 436 estates in the long list apart from those in E.
- E. Landed estates pre-dating the formation of sporting estates.

The results are summarised as follows:-

Class	Number	Acreage	Cumulative acreage
A	32	1 426 939	1 426 939
B	135	2 110 157	3 537 096
C	141	1 337 106	4 874 202
D	113	877 569	5 751 771
E	15	490 343	6 242 114

A study population of around 200 was desired and was derived by selecting all of Class A, B and E and 25% of Class C⁶

⁵ Sources are as follows:-

Wightman, 1996. *Who Owns Scotland*. Canongate, Edinburgh.

Wightman, 1998. *The Highland Council Landownership Database*. Highland Council, Inverness.

Wightman, 2001. Unpublished data held by author.

⁶ The 36 estates were chosen by selecting every fourth one in an alphabetical list

The estates thus selected were as follows:

Class	% selected	No.
Class A	100%	32
Class B	100%	135
Class C	25%	36
Class D	0%	0
Class E	100%	15
Total		218

In summary the statistics relating to the data subjects are as follows:

Population	No.	Acreage	% of land⁷
Candidate estates	436	6,242,114	59.4%
Study Population	218	4,550,327	43.3%
Mailed estates	172	3,851,782	36.6%

Of the study population:

We were unable to obtain sufficient contact details (e.g. offshore companies in Panama) for 24 estates.

A further 22 estates, having been contacted by phone declined to take part.

We thus mailed a total of 172 estates. Of these:

	No.	Acreage	% of mailed estates	% of acreage of mailed estates	% of land⁸
Returned	85	1,841,152	49.4%	47.8%	17.5%
No return	87	2,010,630	50.6%	52.2%	19.1%

⁷ This is the percentage of privately-owned rural land in the Highlands and Islands

⁸ as footnote 7.

Annex II - Additional Information

ACTIVITIES

During the course of the research contact has been maintained with a range of external interests including the advisory panel and other academics with an interest in the topic.

Papers were presented at two conferences and a seminar.

Highland Sporting Estates and the Politics of Leisure.

Paper presented at Leisure Studies Association conference, Glasgow Caledonian University, July 2000.

For these are whose mountains? Hegemony and the Highland Sporting Estate.

Paper presented at Landscapes and Politics conference, University of Edinburgh, March 2001

The Social, Economic and Environmental Legacy of the Highland Sporting Estate.

Invited paper to Seminar of Centre for Environmental History and Policy, St Andrews May 2002.

Posters describing the research and preliminary findings were presented at two conferences

Enjoyment and Understanding of the Natural Heritage. The tenth annual conference of Scottish Natural Heritage, Glasgow, September 2000.

Nature and People: Conservation and management in the mountains of northern Europe. International conference, Pitlochry, November 2002.

IMPACTS

The research topic is of interest to a wide range of organisations and individuals in the field of land tenure, land use, land management, rural development, outdoor recreation and environmental management.

In the context of public policy debates about land reform, public access, recreational land use, environmental management and rural development, the sporting estate assumes some significance on account of its prevalence in the Highlands and Islands.

As a consequence there has been significant interest shown in our research by organisations such as Scottish Natural Heritage, the Deer Commission for Scotland, the Scottish Landowners' Federation, private land agency firms and other academics.

In order to satisfy this interest the authors are preparing a small illustrated booklet highlighting the key findings and drawing on the testimony of informants. This will be distributed to interested parties and made available as an Adobe Acrobat file on the University's website.

To date, the one instance of use outside the project was as part of written and oral evidence given by Higgins and Wightman to the Education, Culture and Sport Committee, Justice Committee, and Rural Development Committee of the Scottish Parliament in January 2002.

FUTURE RESEARCH

This research has provided a sound basis for future research. Themes that might profitably be pursued include the following. They are all derived from observed findings of the research.

- an economic evaluation of the impact of sporting estates in the rural economy
- an economic evaluation of other forms of outdoor recreation in the rural economy.
- an evaluation of the public policy imperatives in approaches to the management and regulation of hunting.
- an analysis of existing frameworks for the integrated management and development of outdoor recreation.