Anne Matilainen (Ed.)

Sustainable Hunting Tourism – Business Opportunity in Northern Areas?

Overview of Hunting and Hunting Tourism in Four Northern Countries: Finland, Sweden, Iceland and Canada

Reports 19

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Summary

Historically hunting and utilisation of game has been a significant source of livelihood in Northern areas. Traditionally the hunting has been a privilege of all social and economical classes and there has been wide access to the game resources for all, unlike e.g. in many Central European countries. Nowadays the hunting is seen more as a hobby than a source of livelihood or as business opportunity, but it still has a significant role in the culture. At the moment approx 6-8-% of the population in Nordic countries hunt. However, it is estimated that in many countries the amount of rural hunters will decrease in near future due to the age structure in rural regions. This can cause growing ecological potential for hunting, and possibly for hunting tourism, which has been recognised as one relevant solution to continue the management of the game populations as well as one potential source of livelihood in the area.

Hunting tourism is still generally a little known business sector and is therefore also an insufficiently utilized resource for rural and regional development. Especially in the Northern areas, which are rich with different kind of game populations due to large wilderness areas and variety of natural habitats, hunting tourism could provide a realistic source of livelihood basing on the special strengths of the remote rural areas. In general the income originating from nature tourism remains typically well in rural regions and the sector is labour intensive, which characteristics make it interesting for rural development. Hunting tourism especially is strongly based on the local expertise on the game and nature habitants. Also lot of rural tourism companies in the area are seeking for more off-season activities, which could continue the season of the companies (typically summer) and provide more economically sustainable prerequisites for the rural entrepreneurship. However, hunting tourism is politically and socially very delegate nature tourism sector raising a lot of different kind of attitudes, even sometimes conflicts between several interest groups. In order to develop the sector in sustainable way, it is essential to understand the current situation and problematic related to hunting and hunting tourism from ecological, social and economical point of view. There is need for feasible solutions to the problematic: how hunting tourism could be developed and it’s business potential utilised so, that it would not jeopardise the ecological or social sustainability and yet be economically viable.

The social sustainability and fluent co-operation with the interest groups is perhaps the most crucial issue related to the development of hunting tourism at the moment. Due to the wide public hunting rights and intensive hunting club activities in Northern countries, one of the key elements for the success of the hunting tourism company is a good co-operation with the local population and more widely, understanding on the local hunting culture and rights of the local people related to that. There are also lot of different kind of attitudes towards hunting tourism and hunting in general that effect to the development possibilities of the sector. Several different interest groups like local hunters and hunting clubs, local people, landowners, indigenous people, nature tourism professionals and public have their own opinions on hunting as business opportunity. In order to guarantee the social sustainability of the sector, all these must be taken into consideration.

Also the ecological sustainability is a core value of hunting tourism. The biological resources set the framework for the enterpreneual activities and e.g. cause the seasonal nature to the activities. The companies must take care of the ecological sustainability in order to operate in the long run. To be able to safeguard this, the companies need to know the acceptable harvesting and reproduction rates and be aware of the population fluctuations. In order to enhance the social sustainability of the sector, the companies need also to be able to prove to different interest groups the ecological sustain-

ability of their operations. Local scale ecological sustainability of hunting tourism will also increase the social sustainability and acceptance of the sector.

From economical point of view, there is a need to find successful and sustainable business models in the sector as well as need for objective business-orientated information, new solutions and better dissemination of existing research results to be able to form a basis of practical business concepts for sustainable rural entrepreneurship.

This report provides background information on hunting and hunting tourism in four Northern countries: Finland, Sweden, Iceland and Canada (Newfoundland and Labrador provinces). The country overviews aim to describe the national hunting culture and state of art of hunting and hunting tourism to help to understand the framework and the potential of hunting tourism sector in each country. Hunting tourism is still a minor sector within the nature tourism as whole. In this kind of developing sector, the transnational approach is needed to be able to form wide background enough to try to identify the good practices, collect research information together and exchange experiences.

The report also sets the background to the joint transnational project related to the topic. It has been developed in the preparatory project called Development of sustainable hunting tourism in Northern Europe (NPP-Hunt), funded by the Interreg III B Northern Periphery Programme.

In all of the countries presented in this report, the hunting tourism sector is relatively undeveloped and there is very little especially business orientated information, knowledge or experience in the sector. In Finland and Sweden there are some entrepreneurs in the sector, but the activities are small scale. In both countries there are wide hunting club activities and the amount of leisure hunters in general has been relatively stable during the last years, even though the amount of rural hunters seem to be gradually decreasing. Approx. 290 000 - 300 000 people in both countries have hunting permit, most of which are men. The proportion of women hunters is increasing in both countries though.

The services of the hunting tourism companies vary from selling the hunting licences to the full service packages. The quality variations are significant and causing some problems in the co-operation between the companies. The hunting tourism customers can be divided into two main groups: tourist buying "full package services" (typically foreign tourists or business customers) and independent tourists (typically domestic tourists, buying mainly the hunting licence and some basic services like accommodation). However, the customer groups of hunting tourism can be extremely segmented e.g. according to the hunting method they practise.

In Iceland the whole hunting tourism sector is still in very initial phase and seeking the direction to develop further. Especially important for the future development is to find solutions on how the benefits of this kind of tourism activities can accrue to the farmer selling the licences. The challenge is to maintain hunting as a viable farming diversification option so that the benefits will not be sifted off by larger tourism retailers.

In Canada, or to be exact in Newfoundland and Labrador province, the hunting tourism sector is relatively large compared to the other countries presented in this report. Concerning the big game resources, these provinces have been recognised among the best in North America. Due to the seasonality, the hunting tourism is typically one activity among others offered by the nature tourism companies, and hunting is supplemented with a diversified range of activities and packages to respond to the changing markets. Nevertheless, the big game resources are the mainstay of the outfitting industry. Economically the industry contributes $37 million to the provincial economy and captures 12.5% of the tourism sector, one of the fastest growing sectors in the provinces. The products are mainly targeted to the North American markets. Recently there has been noticed a downward cycle in the big game populations and there is urgent need for adopting environmental measures that support the conservation and proper management of wildlife resources.

From the country reviews there can be identified some main problems and challenges relating to ecological, social and economical sustainability in hunting tourism that are common to all countries presented in the report.

1) Ecological sustainability

The game populations create the ecological framework for the sector. The central challenge for hunting as well as for hunting tourism is to be able to match the hunting according to the populations i.e. in ecologically sustainable way. The only way to demonstrate the ecological sustainability is to monitor the game populations and population fluctuations by objective methods. The game research must be able to demonstrate the sustainability of hunting and produce and deliver the accurate and updated information on populations of different game species and their trends. The information must be able to be delivered also to the practical level.

2) Seasonality and population fluctuations

The hunting is a typical seasonal activity. It can provide some extension to the season of rural tourism companies by providing low-season activities. However, at the same time, those companies focusing solely to hunting tourism need to find some other activities to match the seasonality in order to create year- round viable entrepreneurship. Especially in Canada and Iceland, the hunting tourism companies are also focused in many cases to fishing tourism. Also other kind of nature guiding services and e.g. camera hunting might provide suitable additional services to hunting tourism companies. Additional services can also help the companies to survive the natural population fluctuations in the game species. There have been problems to develop the service packages in the long run, since the game populations can vary a lot between the years concerning e.g. the willow grouse (ptarmigan). The fluent and well-timed information delivery on the monitoring and research results relating to the changes in game populations is essential to the entrepreneurs.

3) Marketing

In all countries presented in this report, the most of the hunting tourism customers are domestic at the moment. However, the biggest potential for growth and sustainable business is seen in foreign tourist groups. Domestic tourists are usually very independent and are buying sometimes only the hunting licence without any actual services. Foreign tourists spend more money for complementary services, but they are also very quality conscious and therefore much more demanding customer group for the rural entrepreneurs.

In general there is a lack of knowledge on the most potential customer groups (e.g. foreign customers), their demands and suitable marketing channels. The successful marketing of the niche products, which the hunting tourism products generally are, has been problematic in many cases. The peripheral position of the most of the hunting tourism companies in relation to foreign markets does not help. There is a need to find suitable delivery channels and long term co-operation models. Also the market communications are crucial and can be seen as major shortcoming at the moment. In addition the new marketing methods, like Internet are not yet fully utilised in the sector.

4) Communication and co-operation with the interest groups

To be able to respond to the many challenges in hunting tourism sector, close co-operation is needed between the SMEs in hunting tourism sector as well as between hunting tourism companies and other tourism companies. The hunting tourism is very delegate sector and can cause social problems in local level. SMEs may even end up to conflicts with different interest groups e.g. relating to the optional land use activities. Fluent co-operation and open communication with the interest groups and suitable solution and agreement models are needed. Also in all countries presented in this report a vast amount of regulations and legislation direct the sector in national and regional levels. To be able to bring out the standpoint of hunting tourism to the political discussion, strong co-operation and co- initiatives are needed.

There is also a lack of objective information on the sector. At the moment relevant information for hunting tourism companies is scattered or does not exist at all. There is a clear need for objective business-orientated information, new solutions and better dissemination of existing research results so that they can form a basis of practical business concepts for sustainable rural entrepreneurship. The objective information and open discussion on the ecological and economical impacts of hunting tourism also influences usually in positive way to the social sustainability of the sector.

5) Quality management

At the moment in the Nordic countries there is no specific system for evaluating the quality of the products offered by hunting tourism entrepreneurs. The systems available in e.g. Finland, Sweden and Iceland are more focused to the standard nature-tourism forms and do not address the many special aspects of serving hunting guests. Also in Canada there is a lack of criteria for environmentally sustainable practices. Some type of quality management is crucial to make products attractive enough to be able to gain and retain foreign customers groups. The quality management also improves the possibilities for co-operation and joint products between the companies, since the members of the networks need to be sure that the quality of the products will be maintained throughout the hunting tourism package.

In the country overviews of this report, the problematic and potential of hunting tourism have been described more in details in national level as well as some solution alternatives are presented.

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HUNTING AND HUNTING TOURISM IN FINLAND – COUNTRY REVIEW

Juha Rutanen [1)], Anne Matilainen [1)], Markus Muuttola [2)], Kari Tittonen [2)]

1. Background information

1.1. The role of hunting in the society

Hunting has a long tradition in the Finnish society and it still have a significant role in a lifestyle of many Finnish people. However, hunting has no longer in the role of actual livelihood. It has become significant leisure activity. The motives for hunting vary among the hunters. The most important motives are gaining nature experiences, physical exercise, social contacts, gaining meat, game management and prohibiting damages caused by oversized game populations. (Metsästäjäin Keskusjärjestö 2003, Petäjistö et al 2004, Valkeajärvi et al 2004).

The hunting tradition, structure of land owning in Finland and wide hunting club organisation have provided reasonably good possibilities for leisure hunting. For example the residents of Northern Finland have public hunting license, which is secured by legislation to hunt in the State's land areas (ML 615/1993). Even though the hunting license it bound to the landowning, approx. only 40% of Finnish hunters are land owners (Ermala and Leinonen 1995). Approximately 6 % of the whole population of Finland and 15 % of the population of rural areas are hunters (Metsästäjäin Keskusjärjestö 2003, Sievänen 2001). The hunting culture and methods vary in different parts of the country due to the changes in the nature habitats and game species. Also the land use alternatives and business related activities have had their effect to the regional hunting areas. The biggest wilderness areas, largest forest areas and land areas owned by the state are located in Northern and Eastern Finland.

Hunting possibilities are one of the benefits of living in countryside in Finland. The immigration to the cities has, however, decreased the inhabitants in the remote rural areas, especially in Northern and Eastern Finland. The hunting clubs (over 4000 in the whole country) are in many cases the one of the last social activities left in the emptying remote rural villages. The urbanisation of the hunters creates new potential and demand to the hunting services, which can on the other hand provide new opportunities to the rural areas. Near the urban areas there are not enough hunting possibilities and organisational structures to meet the demand of urban hunters.

Traditionally hunting is seen more as a hobby than a tourism related business opportunity (Muuttola 2002), however, recently the potential of the hunting tourism has been brought to the discussion as one potential part of nature tourism and rural development (Martikainen 2006). In addition during the last years there have been some development projects (e.g. www.saalis.fi and www.metsastysretket.fi) promoting the sector. In Finland there are exist some small and part-time hunting tourism companies as part of the rural tourism sector (see 4.5.). Nevertheless, the development of hunting tourism is in its initial phase.

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1.2. The profile of the hunters in Finland

In proportion to the population there are more hunters in Finland than in any other European country (Metsästäjäin Keskusjärjestö 2007). Approximately 300 000 Finnish people claim the annual hunting permit (by paying the game management fee) for the season. This equals 80% of the amount of hunters in total (Metsästäjäin keskusjärjestö 2003, Metsästäjä 1/2007).The remaining 20 % has various reasons not to take part to the hunting season in question. The hunters live all around the country, but the proportion of the hunters in the population is biggest in rural areas especially in Eastern and Northern Finland (table 1).

Table 1. *The amount of hunters and moose bag in 2006 in the different hunting districts of Finland. Source: Metsästäjä 1/2007.*

Hunting district	The amount of the hunters (paid the annual game management fee)	The amount of the moose bag in animals
South-Häme	11 315	2 617
South-Savo	16 659	4 993
Kainuu	16 638	6 371
Central Finland	17 965	5 844
Kymi	16 233	2 808
Lapland	34 940	11 856
Oulu region	41 550	16 444
Ostrobothnia	22 937	5 186
Northern Häme	11 747	3 020
Northern Karelia	19 688	2 037
Northern Savo	27 512	5 239
Ostrobothnia (Swedish speaking region)	9 426	2 902
Satakunta	15 155	1 984
Uusimaa	28 690	2 423
Varsinais-Suomi	13 650	1 854
Total	304 105	75 578

The amount of the hunters has been relatively stabile during the last years. According to the estimates on the urbanisation and immigration trends causing the movement from Northern and Eastern Finland to South Finland, the amount of rural hunters is decreasing due to the age structure in rural regions. It has been estimated that by year 2030 the age structure and immigration will effect to the amount of local hunters as presented in the table 2.

Table 2. *The estimated changes in the amount of hunters in different regions by the year 2030. Source: Metsästäjäin keskusjärjestö 2003.*

Region	estimated amount of local hunters in 2030	change in persons compared to the year 2003
Lapland	23 800	-10 000
Kainuu	9 800	- 3 000
North Häme	10 200	+850
Uusimaa	28 300	+4 800

As a leisure activity hunting has been popular in Finland among all social classes, unlike in many other European Union countries (Metsästäjäin keskusjärjestö 2003). Expect the gender division the socio-economic features of the hunters match well with the Finnish population in general. Typical Finnish hunter is a middle-aged men. According to Pispa 2004, 15 % of the middle aged men (35-64 years) hunt as a hobby. At the moment approx 3% of the total amount of hunters is women. However, the amount of women hunters has increased during the last years. For example in 2003 already 15% of the approx 8000 people passing the obligatory examination for hunting permit were women. (Metsästäjäin Keskusjärjestö 2007)

According to the studies made on the hunters, the average age of the Finnish hunters is 49 years (Petäjistö et al 2004). Approximately 60 % of the hunters are 35-64 years old and one fourth of all the hunters are 45-54 years old. Approx. one fourth of the hunters are under 35 years and one eighth is over 65 years. (Metsästäjäin Keskusjärjestö 2007)

1.3. The trends of the leisure hunting

The location of hunting areas and the amount of population, including hunters, are developing into opposite directions. Due to the limited hunting possibilities near urban areas, the distances to the potential hunting areas are growing. Long distances increase the seasonality of hunting as a hobby and weaken the hunting possibilities especially for younger hunters without transportation possibilities. To the decreasing amount of the rural hunters, the hunting as a method of game management as well as evaluation of game populations might become problematic in the future. Also the scattered hunting areas increase this problem. This development can, however, provide opportunities to the new commercial hunting and guiding services. (Metsästäjäin Keskusjärjestö 2003).

The growing interest by the women towards the hunting can be seen as a positive trend effecting to the amount of hunters in the future. Also the diversification of hunting motives e.g. due to the increasing dog training and breeding activity have had positive impact. Also the growing trend of health activities, organics food and the increasing game populations in general level are positive trends effecting to hunting.

In addition to age structure and immigration as negative aspects can be seen negative attitudes towards hunting and urbanisation, which decreases nature connection of the people (Metsästäjäin keskusjärjestö 2003)

1.4. The organisational structure related to hunting

The highest authority concerning hunting related issues in Finland is the **Ministry of Agriculture and Forestry**. The Ministry oversees and governs both the Hunters' Central Organisation (Metsästäjäin Keskusjärjestö) and regional game management districts. The mission of the Game and Fish Department of the Ministry of Agriculture and Forestry is to secure the perquisites of game, fish and reindeer based industries by guiding the use and management of the natural resources of these sectors. (The Ministry of Agriculture and Forestry 2007).

In addition to this administrative body, the key actors of the national organisational structure are The Hunters' Central Organisation, 15 game management districts and 298 game management associations. **The Hunters' Central Organisation** is the organisation focused on the hunting and game management. It is partly financed by public funds and partly by game management fees, which are collected from the hunters. The regional administrative role is mostly on the game management districts e.g. in providing the hunting licences. The game management associations act as grass root level consultants. In addition the game management associations organise training courses for the "hunting permit" exams according to the national requirements.

Typically the active hunters are members of the game management association of their own region. The most of the hunters are also members of some hunting club. There are approx. 4000 hunting clubs in Finland. The hunting clubs are responsible of providing the hunting area to the use of their members, the practical arrangements of hunting and game management as well as the evaluation of the game populations and surveillance in their hunting areas.

Suomen Metsästäjäliitto (The Union of Finnish Hunters) is a national association based on voluntary membership. At the moment there are approx 2 500 hunting clubs and 147 000 hunters as members. The mission of the union is to adapt the traditional hunting culture into current day and develop hunting to a leisure activity providing physical activity and nature experiences. The Union of Finnish hunters promote also e.g. the hunting traditions and develop the perquisites for hunting and game management. In addition the organisation operates as the "spokesman"of the hunters and aims to promote the land owners' hunting rights and their rights to e.g. rent the hunting areas e.g. to the hunting clubs. (Suomen metsästäjäliitto 2007)

Finnish Game and Fisheries Research Institute (RKTL) is a research institute overseen by the Ministry of Agriculture and Forestry. The Institute produces scientific data on fisheries, game and reindeer for sustainable use of natural resources, and helps to maintain biodiversity through research and aquaculture. The main tasks of the institute are assessing, compiling statistics and predicting fishery and game resources. The information helps to promote sustainable harvesting of the game resources. (RKTL 2007).

The Finnish Forest Research Institute (Metla) is a research institute also overseen by the Ministry of Agriculture and Forestry. Metla's duties are defined by the law and statute to promote through research the economical, ecological and socially sustainable management and use of Finnish forests. Concerning hunting and hunting tourism Metla conducts research e.g. on the recreational hunting as part of the multiple use of forests and make inventories of the damages game species cause to the forests (Metla 2007).

Metsähallitus (Forest and Park Service) is a state owned company that conducts both business activities as well as governmental tasks. Metsähallitus manages and oversees the land and water area owned by the State, totally over 12 M. ha. In management and use of State's land Metsähallitus tries to combine economical aspirations, environment protection and recreational aspirations. One of the objectives under the silvicultural focus is to secure the multiple use of forests. (Metsähallitus 2007b)

- **The Nature Services of Metsähallitus (Luontopalvelut) unit** is responsible of the public recreational services e.g. nature protection areas and national parks. The unit is also responsible for the nature conservation and promoting recreational services in State's land. The Nature Services of Metsähallitus organise and make decisions related to hunting in State's land. (Metsähallitus 2007 a and b)

- **Wild North (VilliPohjola)** is a business unit run by Metsähallitus. The unit is responsible for nature tours and activities all over Finland. The products of Wild North are e.g. fishing, hunting, and hiking products including accommodation. Main product of the Wild North is selling fishing and hunting licences and hiring wilderness cottages to Finnish citizens. Part of the services are implemented in co-operation with the small local enterprises according to the standard business agreement, in which the certain quality level is required from the co-operation companies. The hunting licences to State's land are sold via Wild North unit. (Villi Pohjola 2007)

1.5. The legislation and actors regulating the hunting and hunting tourism in Finland

The hunting right belongs to the landowner in Finland. However, typically the landowners "rent" the hunting right forward to the local hunting club. Renting the hunting areas enables the formation of larger and more feasible hunting areas than the land area of just one owner may offer. In addition to hunting the hunting clubs take care of the game management, evaluation and surveillance of the hunting in hunting areas in their control. Concerning their hunting areas, the clubs can also sell the licences to the hunters outside of the club, if so agreed.

The Metsähallitus (Forest and park Service) takes care of the land and water areas owned by the State. One statutory task of the Metsähallitus is to provide hunting possibilities. Primarily these hunting opportunities are targeted to those citizens that do not have reasonable hunting possibilities otherwise. In addition in Lapland the Metsähallitus oversees that granting hunting licenses to leisure hunters outside the region is not endangering the hunting possibilities of the local people.

In Finland the highest authority concerning hunting is the Ministry of Agriculture and Forestry, which governs directly both the The Hunters' Central Organisation and 15 regional game management districts. The tasks and administrative position of The Hunters' Central Organisation are stipulated in the hunting law (ML 615/1993). The tasks are e.g. develop of hunting and game management, enhancing of the education and advisory services of the sector, governing the game management districts and acting as an expert organisation of the sector in special tasks of the Ministry of Agriculture and Forestry.

The regional game management districts act as the regional authority providing the hunting licences for the most of the game species in their regions (excluded some special species), implement the training and consulting related to the hunting and game management, conduct the regional tasks ordered by The Hunters' Central Organisation and the Ministry of Agriculture and Forestry and oversee the activities of the local game management associations (298 associations nationally). The game management associations act typically in the area of one or two municipalities (Metsästäjäin Keskusjärjestö 2003)

The licence for moose hunting can be granted to the hunting club or hunting party. The amount of the annual licenses is based on the population fluctuations of the game species. The prices for the hunting licences are regulated by the regulation of the Ministry of Agriculture and Forestry.

The game species and the hunting seasons have been legislated by the hunting law (ML 615/1993) and hunting regulation (MA 666/1993). The game management districts can limit the hunting times of certain game species in their area after consulting the game management associations in their regions. Also the hunting clubs can limit the hunting in their own hunting areas, if they see it necessary. The clubs can e.g. prepare rules for annual conservation areas, bag amounts and licences sold outside of the hunting club.

To be able to hunt in Finland the hunter have to pass the "hunting examination". After this it is possible to claim hunting permit required for hunting in general by paying the annual game management fee to the state. The receipt of this payment will serve as "a hunting card" i.e. a certificate of the hunting permit. In addition the hunter has to obtain the hunting licence for the hunting area voted by the holder of the hunting licence (e.g. the land owner). The hunter also needs to obtain the licence to carry hunting gun from the local police office. Concerning moose and bear hunting the hunters have to pass a shooting test and hold a certificate of this. For some game species there is also needed a special hunting license. The requirements are the same to the foreign hunters. To be able to get the Finnish hunting permit, the hunter must be able to present a valid hunting permit from his own country or some other reliable certificate of his national hunting permit. If these certificates can not be provided, the foreign hunters need to pass the Finnish "hunting examination" before he is able to hunt in Finland (Metsästäjäin keskusjärjestö 2007).

2. Ecological sustainability

2.1. The most important game species

Finland's nature is relatively harsh in general and the game density and reproduction rates are not as high as e.g. in Central Europe. Even though when measured by the land area, Finland is relatively big country and there is a lot of different kind of game habitats, due to e.g. the hard winter, however, the amount of game species is relatively small, approximately 50 species. The population fluctuations are significant especially concerning the smaller game species. The most important game species are capercaillie *(Tetrao urogallus*), black grouse *(Lyrurus tetrix)*, hazel grouse *(Tetrastes bonasia)*, willow grouse *(Lagopus lagopus*), northern hare *(Lepus timidus)*, brown hare *(Lepus europaeus)*, moose *(Alces alces*), white-tailed deer (*Odocoileus virginianus)* and roe deer *(Capreolus capreolus)*. From the waterflow the most important game species is mallard *(Anas platyrhynchos).* From carnivore species fox *(Vules vulpes)*, raccoondog *(Nyctereutes procyonoides*), badger *(Meles meles)*, American mink

(Mustela vison), beaver *(Castor fiber)*, muskrat (*Ondatra zibethica)* and pine marten *(Martes martes)* are popular game species. In Finland is also allowed to hunt Wild Forest Reindeer (Rangifer tarandus fennicus), brown bear *(Ursus arctos),* wolf (*Canis lupus)* and lynx (*Felis lynx*). (Metsästäjäin keskusjärjestö 2007). In general it has been estimated that the number of game species and average game density are growing expect the grouse and some waterfowl species. Especially the moose and deer species have diversified. (Metsästäjäin keskusjärjestö 2003)

The Finnish hunters are the most interested in hunting grouse species, moose and deer species and waterflow (Ermala 1995). According to several surveys, the hunters specialising to smaller game species are more interested in hunting tourism services than the hunters specialised to moose and deer species (Heino and Holopainen 2003). The foreign hunting tourists are the most interested in moose, whitetail deer, wild forest Reindeer and grouse species (Muuttola 2007, Teiro 1994, Lämsä and Hietala 1996). The other interesting species the foreign tourists mentioned were Goose, waterflow, willow grouse, northern hare, bear and fox, (Muuttola 2007, Lämsä and Hietala 1996). From the ecological sustainability point of view the hunting tourism services should focus on the game species, which have adequate population structure to recover from hunting pressure.

Some potential game species for hunting tourism

Moose *(Alces alces)*

Moose is the largest mammal in Europe and very much valued game species in Finland. The moose also have quite significant economical value. In autumn 2006 the value of the gained meat (9,7 M. kg) was estimated to be approx. 50 M Euros. (Metsätilastollinen vuosikirja 2006). There are approximately 100 000 moose hunters in Finland. (Koskela and Nygren 2002). To be able to participate to moose hunting the hunters need to pass shooting test. In addition moose hunting requires a hunting license from game management district. The party applying the licence need to be able to provide land area large enough for moose hunting (minimum 1000 ha). The most of the land areas of Finland belong to moose hunting area of some hunting club. E.g. 89% of the land area of Southern Finland has been registered as moose hunting area. (Koskela and Nygren 2002).

Moose has benefited of to human influence in forests, especially of well growing young stands. At the beginning of 21st century the moose population has been larger than never before. For example during the winter 2001-2002 it has been estimated that the moose population was approx. 129 000 animals. During the past years the winter population has been tried to limit between 90 000- 100 000 animals due to the forest damages and the traffic accidents caused by moose. To be able to achieve this, there have been granted annually 70 000-80 000 hunting licences for moose hunting. (Metsästäjä 1/2007) The bag is presented more in details in the table 1. The amount of annual hunting licences is defined each spring in co-operation with different interest groups and it is based on the size of the population. Moose is probably the only game species at the moment of which it can be said that the controlling the population by hunting is very close of the official supervision or the social contribution of hunters to the society. (Metsästäjäin keskusjärjestö 2003).

The moose hunters are typically rural people. Due to the age structure in rural areas, it can be estimated that in near future there is a need to find solutions to control the population and there will be ecological potential available e.g. to the needs of hunting tourism.

Whitetail Deer *(Odocoileus virginianus)*

Even though the whitetail deer is not an original species to Finland (the current population is based on few animals that were donated to the Finnish Hunting Association in the 1930's), it is an important game species today. In 2006 more than 22000 licenses were granted for hunting whitetail deer. (Metsästäjäin keskusjärjestö 2006). Nevertheless, the most of the population is living in Southern Finland and therefore the role of whitetail deer as potential game species is more significant in there, maybe also in Central Finland and Western Coast area.

Wild Forest Reindeer *(Rangifer tarandus fennicus)*
Today some 2.400 animals of Wild Forest Reindeer - the only EU population - are living in three or two Finnish areas: eastern parts - Kainuu, Lieksa and Central Ostrobothnia - Suomenselkä. Thanks to the skillfull game management of Hunters Central Organization under the supervision of the Ministry of Agriculture and Forestry the unique forest reindeer population in Kainuu and even more so in Suomenselkä are stable, even increasing moderately to allow a restricted hunt again in these areas. (International Council for Game and Wildlife Conservation 2007). Even though the population is quite limited in some special areas like Suomenselkä wild forest reindeer can offer some potential for hunting tourism as a speciality.

Willow grouse *(Lagopus lagopus)*

Previously willow grouse occurred in whole Finland. Nowadays the most of the population is located in Northern Finland (Lapland, Oulu region and Kainuu game management districts) on hills, peat lands and forest areas surrounding the peat lands. The drainage of peat lands has been estimated to be one of the main reasons for the fall of the willow grouse population in Southern Finland

The big population fluctuations are typical for the willow grouse, which can also be seen in the amount of annual hunting licences. The exact knowledge on the bag does not exist, but it has been estimated that e.g. during the years 2000-2004 the bag of the willow grouse was 86 000 animals. (Metsätilastollinen vuosikirja 2006). The population fluctuations of willow grouse follow the changes in the mole and small carnivore populations.

In Northern Finland approx 60% of the hunters hunt different kind of grouse species. (Keränen 2007). In addition in northern parts of Lapland there are a few professional hunters hunting willow grouse. The demand for hunting licenses provided by Metsähallitus in the State's land for willow grouse is big and there have not been enough hunting licences for all interested hunters during the season.

The potential of the willow grouse in hunting tourism is in its popularity as a game species. However, it can be estimated that due to big local interest the social conflicts with potential hunting tourism companies might be significant.

2.2. The evaluation system of the game population fluctuations in Finland

From the aspect of ecological sustainability of hunting, it is relevant that the hunters and administrative organisations have trustable and updated information on the populations and reproduction rate of different game species. In Finland the populations have been followed by using very accurate methods. The responsible organisation on the game population estimations is RKTL in co-operation with The Hunters' Central Organisation and game management districts. Annually approx. 10 000 hunters are participating to the field work (collecting information in the forests). The field work is conducted pro bono.

For different game species there are different kinds of evaluation methods. For forest species it is developed so called triangle calculation system, which can be used both on winter and on summer time. The populations of the field species are also followed by field triangle calculation system. The waterflow populations and the reproduction rate is followed by counting the mating couples in May and the chicks in July. The moose population is evaluated during the hunting season with special moose observatory charts. Some evaluations of moose population are also made during the winter by counting the tracks from the snow and also by using the helicopter typically during February-March. (RKTL 2007).

Game stock triangular calculations

The game stock triangle is a 12 kilometre wide, equilateral triangle shaped route that has been marked to the terrain permanently. The method has been used for nearly 20 years. Game stock observations today have been counted out of nearly 800 triangles yearly. 5000 people participate in these calculations. The most triangles exist in the northern part of Finland: in the summer 2006 game stock observations were counted by the regional game management organization of Lapland from 146 triangles. In Kainuu region the observations were counted from 91 triangles and in Oulu region from 88 triangles. In the southern part of Finland, the triangle density is in some regions much lower. (RKTL / Helle and Wikman 2006)

From the game stock triangle fowls, hares and woodcock are counted in the beginning of August by walking in 3 person groups along the sides of the triangle in a 60 meter wide sector. Also all findings indicating bears are written down. In the winter from January to March tracks going trough the sides of the triangle of mammals are counted by two person groups. (RKTL / Helle and Wikman 2006)

The date from these surveillances are delivered to the Finnish Game and Fisheries Research Institute that, after having done the analyses, delivers the results from the calculations back to regional level. In the recent years these calculations have been advised to be done in such an early stage that the results would be available for the summer meetings of local hunting associations, where usually decisions are made to determine quotas for the autumn's season. The hunting licenses granted by the Ministry of Agriculture and Forestry are divided in to two parts: first one begins in June and the second one in September after the game stock counting results have been received to safeguard the sustainable harvest of the game. (Ministry of Agriculture and Forestry 2007)

One of the main purposes of the triangular game stock count is to help to determine the suitable number of hunting licenses compared e.g. to current grouse stock. For this reason the processing and presentation of the data has been transferred in to a real time on-line service. For example in 2006 the service enabled to follow triangular counting results from the beginning of 10th of August, with a triangle number of 300. The prospects of the research and game surveys to give exact numerical recommendations for maximum hunting amounts has decreased since 1990's since the regular fluctuations in game stocks has disappeared in Finland concerning some species. (RKTL / Helle and Wikman 2006)

Moose observation cards

Moose hunting clubs note down observations of bull, hind and fawn moose daily and also do an evaluation of the moose population after hunting. Information is gathered of the size, reproduction and structure of the moose population with the help of observation cards.

In 2005 the moose hunting card was returned by 5300 hunting clubs, which equals to about 85 % of the total prey. Among regional game management districts the number varied from 55% to 100%. The method has been used for around 30 years. Based on the results, number of future hunting licences is planned and evaluations are made of the effect of hunting on the moose population. (RKTL/ Ruusila 2007)

Waterfowl evaluation

Waterfowl breeding brood count in inland water areas are measured in a long-term evaluation at regular counting places around Finland under the management of RKTL and The Finnish Museum of Natural History. The practical part of the work, calculations, is done by volunteer hunters and birdwatchers. In May- June nesting is evaluated by pair count, which will be done twice. Number of chicks is evaluated in July in a count, which is done once. The main focus of the count is on the most commonly hunted species such as mallard, teal, European wigeon and goldeneye, but the countings produce information also for the evaluation of other species. The results give information concerning game stock and the success of nesting that are needed for the autumn's hunting season. (RKTL/ Pöysä ja Wikman 2007)

The comparison of pair count of waterfowl between different years, as well as the nesting density index, is based on data gathered from the same places in consecutive years. In the density index, the largeness of the stock in compared to a long-term (for example 1986-2006) mean value. In addition, the number of chicks- index is compared to a long-term average. In 2005 and 2006, the counting was done at 550 surveillance spots for the pair count and at 315 for the brood count. (RKTL/ Pöysä ja Wikman 2007)

2.3. A summary of the main ecological challenges and problems concerning hunting tourism

1) ***The information delivery of the population fluctuations to the hunters/hunting tourism companies.*** The central challenge for hunting as well as for hunting tourism is to be able to match the hunting according to the populations i.e. in ecologically sustainable way. (Metsästäjäin Keskusjärjestö 2003). This requires constant evaluation of the population fluctuations by objective methods. The game research must be able to demonstrate the sustainability of hunting and produce and deliver the accurate and updated information on populations of different game species and their trends. The information must be able to be delivered also to the practical level.

2) Concerning the hunting tourism, ***the limited game populations create the ecological framework for the sector.*** Mainly the changes in the natural habitats have caused the increasement of the moose population, when at the same time the grouse populations have decreased. When implementing the hunting according to the Finnish hunting culture, the hunting tourism companies can not necessarily guarantee the catch. Concerning many species even the finding and spotting out the animals might be very labourous. However, this is a part of hunting tradition in Finland.

3. Hunting culture in Finland

The hunting culture of Finland has developed from culture, in which the utilisation of natural resources for food or other uses has been essential for surviving. Traditionally there have been extensive rights to utilise nature. The landowning structure and the state's large land areas have provided good hunting opportunities and possibilities. During the 20th century sustainability aspect has been brought to the discussion and the hunting has transformed to a leisure activity and also a lifestyle, in which the game management and population evaluations have become as significant part. The large amount of the previous hunting methods has been forbidden and the ethics of hunting has become more significant factor as before. Due to the variation in the game species and nature there are differences in the hunting culture of the different regions in Finland.

In the Finnish hunting culture respect for nature and operating in line for the nature are highlighted. The game is living free in the forests and often large areas must be covered to reach it. Physical exercise and experience of wilderness belong to the hunting experience. The hunters seek the connection to the nature and also are prepared to respect the peace of nature. The Finnish hunter is proud for the good knowledge on nature and game species. The use of the hunting dog (barking spitz or hound) has traditionally been a part of Finnish hunting culture. In addition the hunting trip includes making an open fire for food and resting by it, even through the night, especially when hunting in a group. (Väisänen 2007)

For Finnish people game can still be seen as origin for food. The bag is respected by using it as food in households as a special treat. The actual trofee hunting culture is very rare in Finland. The bag is not chosen e.g. based on the biggest horns.

The development of the society influences also to the hunting culture. For example the development and popularisation of different kind of technical devices, better accessibility to the hunting areas and the expectations towards the "wilderness services" modify the hunters' behaviour (Väisänen 2007). Good examples are the fire places built by Metsähallitus to state's land. According to the customer feed back a part of the customers were very happy with the new services, when others see that in true wilderness there should not be any man made infrastructure.

4. Economical sustainability

4.1 Hunting tourism in Finland

Hunting tourism can be seen as hunting in which the hunter travels outside of his own hunting area or his place of residence to hunt. A hunting tourism company is an enterprise offering possibility to hunt either in the company's own land or in the land owned by others via different kind of co-operation agreements. Hunting tourism is commercial activity service, in which the customer is offered the possibility to hunt different game species. In addition to actual hunting the hunting tourism product can include other services like accommodation, catering services, guiding services or even conference and other activity services. However, according to the new Metsähallitus law, the entrepreneurs can no longer buy the hunting licence to state's land for the customers. At the moment the customers have to purchase the licence individually.

There are no national surveys on the commercial hunting tourism provision in Finland. However, it can be estimated according to several regional surveys that there are a lot of various kind of service providers. The hunting tourism services are provided by farm holiday companies, activity and programme service companies and hunting clubs. Typically the companies are operating from part time basis and in very small scale, for example just selling the hunting licences in addition to farm accommodation services. According to the survey done in Central Finland region 60% of all hunting tourism supply was targeted to the so called independent tourists. Only 40% were offering actual hunting tourism packages. The income originating from hunting tourism varied from few hundred euros to 10 000 euros or more. Typically the companies have started to offer hunting related products in 1990's and at the beginning of 2000. Also very typical for these companies was that the market information related to hunting tourism products was very scattered and hard to find. (Matilainen and Pouta-Pohjosaho 2003).

There are approx. 10-20 of professional hunting tourism companies in Finland, who market actively the hunting tourism services also to foreign customer groups and e.g. have contact to sales agents in other countries. In addition to hunting these companies offer also e.g. fishing tourism products, accommodation, catering, guiding and different kind of activities. The common elements to these products are nature experiences.

There are some rough estimates on the amount of the smaller operators. It has been estimated by the professionals in the sector, that approximately 500-1000 tourism enterprisers sell the hunting licences to the individual tourists and maybe around 200 companies are offering various sort of hunting tourism products alongside of their other products. It can be anyway estimated that only 10-20 companies or so are specialised to hunting tourism in Finland and can be called as a professional hunting tourism companies.

4.2. The customer groups of hunting tourism in Finland

The customers of the hunting tourism products are mainly men aged 30-60 years (Matilainen and Pouta-Pohjosaho 2003). According to the national inventory of the recreational use of nature 93% of hunting tourists were men. In the age structure the amount of early middle aged hunters was emphasised (Sievänen 2001).

The hunting tourism customers can be divided into three main groups: Finnish leisure hunters, foreign leisure hunters and business customers (partners of some Finnish company) including possible VIPs. (Matilainen and Pouta-Pohjosaho 2003). The Finnish leisure hunters are e.g. hunters living in urban areas of Southern Finland, who do not have possibilities to hunt otherwise. These hunters also want to have different kind of hunting experiences and seek for original wilderness experiences. Also the increasing activity with training and breeding hunting dogs evoke the hunters to look for suitable hunting environments. Customer groups of hunting tourism can be very segmentated e.g. according to the hunting method they practise.

Annually less than 1000 foreign hunters claim the Finnish hunting permit required for hunting in Finland. The accurate statistics of the origin of the foreign hunters does not exist, but based on the interviews of the hunting tourism entrepreneurs, the most common countries have been Germany, Austria and Switzerland. (Muuttola 2007, Matilainen and Pouta-Pohjosaho 2003).

The business and VIP customers can be seen as one important customer group. For example the companies offer incentive hunting trips to their key customers. In addition policy makers invite their interest groups especially to moose hunting.

The Finnish hunting tourist is often very independent, sometimes only purchasing the hunting licence. According to the recent surveys, 70% of the hunting tourists buying the hunting licence for willow grouse in Northern Finland also use the services of local accommodation companies. (Liukkonen et al 2007). The level of the accommodation is often very basic one. Expect of sauna and possibly catering services the Finnish hunters very rarely use any other tourism services.

The foreign hunting tourist typically requires more quality for the accommodation than the typical Finnish hunter. The good quality cottage or farm accommodation should locate reasonably near of the hunting area. The main thing for the foreign hunting tourists, when choosing hunting destination and company, is always the high quality of the hunting arrangements. (Muuttola 2007 & 2002, Lämsä and Hietala 1996, Matilainen and Pouta-Pohjosaho 2003).

The incentive hunting tourist are usually provided tailored experience services combining hunting and other tourism services. Good quality standards are required from accommodation as well as catering services and the customers' wishes are taken into consideration individually.

4.3. Hunting tourism as part of the rural tourism

Even though the nature tourism has been seen as one main strength and potential of rural tourism in Finland, the hunting tourism has yet a very minor role in it. However, the potential of the sector has been brought to the discussion. There is continuous need for develop activities to the low-season and promote the round-the-year activities in rural tourism sector as well as promote new nature-based tourism products based on the natural strengths of the regions (see e.g Maaseutumatkailun teemaryhmä 2000, regional development plans (e.g. Lappi, Kainuu, Pohjois-Karjala, Pohjois-Pohjanmaa) Matkailu vuonna 2020…). In some regions hunting tourism (e.g. Lappi, Kainuu, Pohjois-Pohjanmaa) is mentioned as one potential sector of nature tourism. Also recently in national level the Theme Group of Rural Tourism in Finland has considered hunting tourism as one way to diversify nature tourism and continue the season of the rural tourism companies. (Martikainen 2006)

4.4. Nature tourism in Finland

The regional economic role of nature tourism has become significantly more important over last few years (Matilainen et al 2005). Especially in Northern Finland the tourism is based on nature and nature-based activities (e.g. Lappi Elämänvoimaa 2003, Lapin elämysteollisuuden…). However, it is difficult to measure the economical and employing importance of nature tourism, since in the national statistics it is a part of the tourism sector in total.

Nature tourism and recreation services are one of the fastest growing branches in tourism sector. During 2003-2004 the turnover growth rate has exceeded up to 8,5 % concerning big safari enterprises. In the group of the small companies offering activity services the growth rate during 2003-2004 was approx 6%. In the latest sector report it was also estimated that the markets of nature-based activities in tourism sector are still growing in the future. The product groups that will grow the most has been estimated to be different kind of incentive-products, fishing products and wellness products (Ryymin 2006). The incomes originating from nature tourism remain typically well in the rural regions and the sector is labour intensive (see e.g. Saarinen 2003, Ministry of the Environment 2002, Honkala 2001), which characteristics make it especially attractive concerning rural development. The potential of the sector is taken in consideration in various regional development plans and initiatives and the resources have been allocated to develop the rural tourism sector in general. However, hunting tourism has not been in a focus of intensive development activities, most likely due to special characteristics and complexity of social sustainability in the sector (e.g. HANKE2000-järjestelmä).

There is a lot of variation within the companies operating in the nature tourism sector. In 2004 there were approximately 1870 companies offering activity services (Ryymin 2006). According to the survey of Ministry of Environment in 2002, approximately 500 enterprises concentrate especially on nature tourism in Finland. 150 of them are small, operating on a seasonal basis. In addition to nature tourism companies, the sector brings significant incomes to other businesses in the rural regions. It has been estimated that 2/3 of the incomes originated from nature tourism benefit other businesses than the actual nature tourism enterprises (Ministry of the Environment 2002). Regionally the most developed and potential areas of nature tourism are Lapland and Kuusamo.

4.5. Typical hunting tourism enterprises in Finland

Typical hunting tourism companies of Finland can be roughly divided into following classes:

Hunting tourism services combined to the farm holiday activities

There are hundreds of farms in Finland offering at least as part time job tourism services. Many of them are offering also hunting tourism services in order to fill up the low season of autumn and early winter. Typically hunting takes place in the entrepreneur's own land area or by co-operation arrangements with a local hunting clubs on the common land area of a few landowners. Usually the farm also develop the living conditions of the game species by some intensive game management actions. In addition they typically build some infrastructure e.g. shooting places. Usually the hunting is focused on the small game species, the most common being the waterflow and fasan. The customer groups are small hunting parties or the business customers. To many of these companies the customers return year after year. In addition to hunting, these hunting tourism products can include other services from transportation, catering and accommodation to hunting-dogs with the guide.

Hunting from the rented cottage

There are hundreds of entrepreneurs renting cottages in rural areas, who also advertise the hunting possibilities. Some of the entrepreneurs can offer their own land areas for hunting, but a significant amount base their hunting products on co-operation with the local hunting club or on State's land. The customers are mainly very independent hunting tourists, who rent the cottage as a small group. The services bought are typically only the accommodation and sauna. Some of these entrepreneurs also offer maps and guiding services.

Hunting with the professional guide

A few companies offer the hunting experiences with the professional guide, who is familiar with the local areas and hunting conditions. Typically this service is targeted to groups from 1 to 5- persons in time and tailored often according to their needs. In addition to hunting these hunting tourism products include full service from the transportation to the catering and accommodation services. If needed, the entrepreneur can also provide hunting dogs with the guide.

Camera hunting

During the recent years especially in Eastern Finland camera hunting has become more and more popular. Already several companies base their business to offering photographing tours to tourists. Typically e.g. the bears are attracted to the carcass in the forest and the photos are taken with professional guide utilising infrastructure especially designed for this. The customer groups vary from people interested in nature to the business customers.

4.6. Examples of hunting tourism companies around Finland.

Eräpalvelu Iso-Heiko (www.erapalvelu.com)

Eräpalvelu Iso-Heiko offers hunting in Lapland wilderness. Customers can hunt bears, elks, grouse and buy accomodation, meals, guides, shooting licences, transfers etc. E.g. the three day package for bear hunting between late August and the end of October, with a group size minimum 4 persons, includes accomodation, dining, guide's services, hunting licences, transfers from (and to) nearest airport. The customer only needs to have a permissible gun.

Saarijärven Eräpalvelut (www.erapalvelut.com)

In the Cenral Finland, in Saarijärvi operates a tourism program service company that arranges guided hunting, fishing, hiking and other nature treks. Main objective of the treks is always to offer high quality experiences to the clients. In their base camp in Summassaari, Saarijärvi the customers can taste the real wilderness atmosphere also in accommodation. The game species for hunting are small game (forest birds and hare) as well as moose. Hunting areas are located in Saarijärvi and neighbour countryside.

Erä-Korpinen (www.reisjarvi.fi/erakorpinen)

The holiday cottages of Erä-Korpinen are located in northern Ostrobothnia, along the shore of lake Korpinen. Lake is located in the scenic municipality of Reisjärvi with a large number of rivers and lakes. The vast state forests surrounding the holiday cottages and the lands of the hunting clubs provide excellent opportunities for hunting, fishing and hiking. The game species for hunting are: grouse species (capercaillie, black grouse, hazel grouse, willow grouse), moose, waterfowl, goose, wood pigeon, hare and wild forest reindeer. Erä-Korpinen opens the hunting season with wood pigeon in the numerous game fields of their own. Also several types of waterfowl hunting are available – from managed waterfowl sites to backwoods goose bogs. For hunting grouse and hare, Erä-Korpinen has more than 80.000 hectares of hunting grounds rich in game and for moose hunting Erä-Korpinen have 4 moose hunting areas from 5.000 to 24.000 hectar.

Finnature Ltd (www.finnature.fi)

Finnature Ltd. started in 1993, organising guided bird tours around Liminka Bay. The company has come of age alongside its owners as it has been steadily growing and expanding its business abroad. The company currently employs around ten top nature guides with expertise in birds, mammals, and plants. Last five years Finnature has been offering guided wildlife photography in state-owned lands. E.g. Golden Eagles, Owls, Grouse, Bears and Wolverines are all possible to photograph with expert guidance of Finnature guides. Bird- and wildlife watching tours are operated to Finland, northern Norway, Estonia and Russia mostly concentrating on foreign clients arriving from outside of Finland.

4.7. A summary the main economical challenges and problems concerning hunting tourism

- The new law set by the Ministry of Agriculture and Forestry concerning the obligation to obtain hunting licence individually and the changes it brings to work of entrepreneurs, who base their activities on hunting on State's land and need to ask, unlike previously, their customers obtain the hunting licences directly from Villi Pohjola.

- The lack of successful and sustainable business models in the sector (see e.g. Matilainen & Pouta-Pohjosaho 2003, Heino & Holopainen 2003)

- At the moment relevant information for hunting tourism companies is scattered or does not exist at all (e.g. Muuttola 2002, Ahonen 2005). There is a clear need for objective business-orientated information, new solutions and better dissemination of existing research results so that they can form a basis of practical business concepts for sustainable rural entrepreneurship. The same kind of problems has been clearly identified also in other relatively similar nature tourism sectors e.g. concerning fishing tourism (Laiho, Herranen & Kivi 2005).

- Also the entrepreneurs and experts in the hunting tourism sector are scattered and there is a lack of co-operation, e.g. between entrepreneurs, marketing agencies, administration and monitoring agencies, and local actors (Heino & Holopainen 2003)

- Lack of knowledge on the potential customer groups

- Problems to develop the service packages in the long run due to the population fluctuations

- Lack of co-operation between the hunting and tourism professionals

5. Social sustainability

Due to the fact that the land area of one land owner rarely provides enough possibilities to hunting, the hunting tourism entrepreneur operates often in the land areas owned by some one else. To conduct the activities successfully requires a lot of functional co-operation between different interest groups. Before the good co-operation can be created, the interests and aspiration of different groups should be taken well into consideration and the required trust between the parties must be created. There is a lot room for development in this respect.

The landowners' attitudes as well as the attitudes of hunting clubs towards the hunting tourism are delegate. The hunting tourism should not significantly influence to the land use or hunting possibilities of the local people. The hunting licences sold to the tourists often reduce the amount of the licences granted to the local hunters. The game populations maintained for hunting tourism should also not have a negative influence to the livelihood of local people (e.g. damages to forests). In addition in Lapland the special rights on Sámi people must be taken in consideration.

Typically the land owners have not reclaimed actual financial compensation for renting their land to the local hunting club. If the business activities of hunting clubs increase, the landowners may want "their piece form the cake". This can lead to the fact that the financial compensations are required also from hunting clubs that do not have business activities and it can has influence to the hunting possibilities in general.

In developing the hunting services the Finnish and local hunting culture should be taken as a main guideline. The services should be authentic also from the customer's perspective. In this respect the situation in Finland is relatively good. Also the social acceptance for the business activities is easier to gain, if the local values are respected.

6. Other information

6.1. References to the regional or national policy programmes regarding the hunting and hunting tourism

In national tourism policy and programmes hunting tourism has not been especially highlighted nor pointed out like fishing tourism recently. However, the role of nature tourism and different kind of nature-based activities is mentioned as one main sectors of tourism. Also the need for low season activities, new innovative nature-based products and potential of the foreign customer groups is recognised in different policy programmes. Especially the game and hunting is mentioned, in some regions as regional strengths. In Lapland in addition to nature tourism, hunting has been highlighted as one special rights related to the lifestyle of Sámi people that should be secured (see e.g.Lapin maakuntaohjelma 2007-2010, Lapin maakuntasuunitelma 2022). In the development plans of Pohjois-Karjala region also the game as a source of special, indigenous food products was mentioned (Pokat-Pohjois-Karjalan maakuntaohjelma 2007- 2010).

In several tourism strategies and policy programmes it has been highlighted that solely to nature related tourism products are not enough for the demands of the customers. Even to the nature tourism there should be able to combine some local culture and lifestyle. (see e.g. Suomen matkailun vientibarometri 2006, Lapin matkailustrategia 2003-2006)

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Hunters’ Central Organisation (Metsästäjäin Keskusjärjestö), www.riista.fi

Regional game management districts (15) www.riista.fi/?mag_nr=10

Game management associations (298). www.riista.fi/?mag_nr=11

Suomen Metsästäjäliitto (The Union of Finnish Hunters) www.metsastajaliitto.fi

Finnish Game and Fisheries Research Institute (RKTL) , www.rktl.fi

The Finnish Forest Research Institute (Metla), www.metla.fi

Metsähallitus (Forest and Park Service) www.metsa.fi

The Nature Services of Metsähallitus (Luontopalvelut) unit www.metsa.fi

Wild North (VilliPohjola) www.villipohjola.fi

Ministry of the Environment, www.environment.fi

The Theme Group of Rural Tourism, www.maaseutupolitiikka.fi/index.phtml?s=149

MEK Finnish Tourism Board, www.mek.fi

HUNTING AND HUNTING TOURISM IN SWEDEN – COUNTRY OVERVIEW

Mats Andersson[1)], Håkan Gyllbring[2)], Fredrik Dahl[3)]

1. Background

Hunting has a long tradition in Sweden and is well established in society. In Northern Sweden 30-40 per cent of the people live in a household where someone hunts, while the figure for the Sweden as a whole is 13 per cent (Ericsson and Heberlein, 2002). More than 80 per cent of the Swedish people, furthermore, are favourable to hunting (Ericsson and Heberlein 2002). Earlier, hunting was essential for survival, in particular for settlements in rural areas. Today hunting is mainly recreational activity, although, in Northern Sweden moose meat still makes a large contribution to the food supply (Ericsson et al. 2005).

In most of Europe and also in sizeable cities in Sweden hunting is generally seen as a sport for the rich. However, the Swedish hunter is usually an ordinary worker and hunting is seen as a common right. This probably sprung from the time when people hunted for food in vast and largely untouched forests, plentiful with game. Today there are still large areas in Northern Sweden where the hunting pressure on game is very low, and people are increasingly moving south and to the big cities to work. Thus, the hunter of today often lives in cities, there is a strong tradition to return "home" for the annual moose hunt when these villages come back to life for a few weeks. For many hunters, hunting is today mainly a recreational hobby, but is still considered very important to their physical and mental wellbeing. In a recent study almost half of the respondents claimed that no other hobby could ever replace hunting, if they were forced to quit. Actually there is on going study investigating the potential effect hunting may have on the hunter's physical and psychological health (Mattson et al., unpublished data).

Overall interest in recreational hunting has been fairly unchanged over the last decades. The profile of the hunters, however, has shown some changes as described above. There are roughly 286,000 hunters in Sweden. Most hunters are men, but more and more women are taking up hunting. 13,889 women were granted a hunting permit in 2004, up by 400 over the previous year.

Since 1985 all new hunters have been required to pass an examination comprising five separate parts, both theoretical and practical. Passing this examination is an essential pre-condition to possess firearms. However, foreign visitors can obtain permission to bring their own firearms and use them in Sweden. Those possessing a firearm licence for hunting weapons issued before 1985, are not required to take the new Swedish hunting examination as well as the foreign citizens hunting for no more than three months in Sweden.

Everyone, who engages in hunting must pay an annual game management fee of SEK 250 by obtaining a hunting permit for the season. The money is used for purposes like game management and providing information on hunting issues. Apart from the hunting permit, the hunter also has to obtain a licence for the specific area, where the hunting is to take place (if this area is not owned by the hunter). IN hunting tourism activities, it is the responsibility of Swedish hunting hosts to ensure that these requirements are complied.

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Every landowner has the hunting rights to his or her property, regardless of whether it is large or small. If landowners do not want to exercise these rights, they can lease them out in whole or in part. Hunting takes place to a greater or lesser extent on most land areas in Sweden, where it is legally permitted. Approximately 50 % of the land in Sweden is owned by the state or by forest enterprises, particularly in the northern and central regions of the country. On the big part of this land the hunting rights are leased out to individuals or hunting associations. In the areas, where the availability of land is limited, co-operation is necessary to ensure sustainable hunting. Owners of hunting rights in various areas therefore often pool their rights to make larger management areas. Co-operation is particularly necessary for moose hunting to ensure sustainable use. In Northern Sweden, where there is a small amount of people living in large areas, it is quite possible to obtain a place in a hunting team or even rent some land of your own without excessive costs. This is, however, not the case in the southern part of the country where practically all hunting grounds are occupied and hunting rights or club memberships are very expensive.

In southern Sweden there is also a long tradition of hunting tourism, especially on large private estates, while this is a fairly new phenomena in the north. Another increasingly popular option is to go hunting in Sweden as a "paying guest", and more and more landowners and hunting co-operatives offer this opportunity to both Swedish and foreign visitors.

Sweden is committed to long-term conservation of viable populations of wild animals occurring naturally in the country, and it must also be possible to make use of the natural environment in a sustainable way. Game management is governed by legislation based on international conventions, including the 1992 convention on biological diversity. The Swedish Environmental Protection Agency (EPA) is the central government agency for hunting and game management issues, while County Administrative Boards are responsible for these issues at regional level. The two national hunting organisations, the Swedish Association for Hunting and Wildlife Management and Jägarnas Riksförbund (the national hunting federation), help by spreading news and information on hunting and game management issues. A third hunting organisation is Sveriges Yrkesjägareförening, which caters for professional hunters, mainly those stationed on the estates in southern Sweden.

In principle, all wild mammals and birds are protected. The hunting regulations determine which animals can be hunted and when this can be done. Some twenty species of mammals and forty or so species of birds can be hunted during the periods specified in the regulations. In general, an unlimited number of individual animals can be felled during the general hunting season, but with some species like moose, the County Administrative Board determines how many animals may be felled.

1.1 The legislation and the actors regulating the hunting and hunting tourism in Sweden

No special legislation in addition to general hunting regulations exists regarding hunting tourism. However, most County Administrative Boards want to be informed about such activities when the hunting tourism products involve hunting on areas managed by the county authorities. There are also counties that require written agreements.

Some hunting and fishing rights are associated with reindeer husbandry rights (Ekström S, 2005). Members of Sami reindeer herding districts have the right to hunt and fish on outlying land within the foraging land belonging to the mountainous forage areas and former nomadic Sami land. However, this may take place only, when reindeer husbandry is permitted in the area. The hunting and fishing rights of the reindeer herding district members apply both on Crown land and on private land. The right is not restricted to hunting for household needs, which means that reindeer herding district members also have the right to hunt and fish for commercial purposes. Under the Reindeer Husbandry Act neither the reindeer herding district nor the individual member may transfer hunting and fishing rights to another person or people. The reindeer herding district may, however, give a former member of the reindeer herding district the right to hunt and fish for household needs within the reindeer herding district foraging area. Hunting and fishing was originally basic to the Sami livelihood. Income from hunting and fishing was taxable. To this day, tax on Sami hunting and fishing is levied via the reindeer herding enterprise, both as sold goods and as personal consumption of products from the enterprise.

Up until the 1960s, ptarmigan hunting in the form of winter hunting with a gun or snare was the most economically significant hunting form. Since the 1960s moose hunting has become considerable more important to the reindeer husbandry economy. A competitive situation arises on land where rights are granted to other moose hunters. The most intense conflicts of interest are on private land, where the Sami people also have hunting rights. Sami hunting and fishing tourism is carried on through hunting and fish conservation associations or by individual reindeer herding district members. The operations are small scale and usually carried on as a complement source of livelihood to reindeer husbandry.

2. Ecological sustainability

The species of primary interest for development of hunting tourism in Northern Sweden are moose, willow grouse/rock ptarmigan, capercaillie/black grouse, mountain hare and beaver. Other species of less general interest, but still having some local interest, include hazel grouse, red fox, pine marten, ducks, geese, seals, brown bear and lynx.

The ecological sustainability of the moose is not a major concern as the moose hunting licence is decided by the state together with the local hunters, based on aerial inventories, hunter observations and previous bags. The control is rigorous and over-harvesting is rare. The potential for selling moose hunting rather is dependent on social factors and access to hunting grounds (see below).

For small game on contrary to the moose there are no or few social issues and access to land is generally not a problem. However, there is an alarming lack of knowledge of how much game can be harvested without jeopardising populations. No or few inventories of the populations are carried out except for reports of annual bag statistics, and no legal regulations apply on how much game can be harvested. An exception to this is the annual inventory of willow grouse in the Swedish mountain chain where the effects of hunting can be followed and regulations are enforced when necessary (Hörnell-Willebrand 2005). Traditionally there has been no need for a more rigorous monitoring scheme of small game in Northern Sweden, because the hunting pressure has always been low. In the case of increased hunting tourism, where - at least locally - one could suspect there would be high hunting pressure, however, it is necessary to put in place some kind of monitoring assessment to assure sustainable use. It is also necessary to develop tools to be used with this monitoring, i.e. so that the entrepreneur can see when the population is falling to or approaching a dangerous level.

Such a tool could also be used as a quality measurement for the entrepreneur, as is it probable that selling an inferior product will give bad publicity, resulting in fewer guests in subsequent years.

Potential of some game species relating to hunting tourism

Northern Swedish Moose *(Alces alces)*
Dwindling numbers of hunters in hunting teams create scope to bring in foreign hunters, partly to help meet the quota, but perhaps primarily to enable low-cost hunting and meat for the local hunters. A possibility also for the entrepreneurs, who then pay the local hunting club a reasonable sum for the licence and the hunting area, which benefits everyone.

Willow grouse *(Lagopus lagopus)*
Very popular hunting e.g. among Italian customer gourps. The customers are willing to pay well for good hunting in the Swedish mountains.

Capercaillie/ black grouse *(Tetrao urogallus)*
Traditional north Swedish grouse hunting with a baying bird-dog or treetop grouse stalking has the potential to become highly exclusive among European hunters, if the product can be sold in sustainable way. Main interest today is for customers coming from Austria and Germany in shooting trophy cocks, as well as hunting with a pointing dog according to southern European traditions.

Mountain hare *(Lepus timidus)*
In general, limited international interest, but sales of hare hunting have increased greatly in Northern Sweden in the last 10 years because of the spread of wolf population and increasing amount of wolf attacks on hunting dogs in central Sweden.

3. Economical sustainability

Of the approximately 260 hunting tourism enterprises in Sweden, about half are in the three northernmost counties. There are almost 60 enterprises in Norrbotten, 40 in Västerbotten and 35 in Jämtland. The hunting activities in these counties take place above all in inland and mountain areas. The companies have also formed different kind of forms to co-operate with each others. E.g. in Västernbotten region Västerbottens Jakt- och Fiskegille, a hunting and fishing association, and Swedish Lapland Hunting Network have around 40 member enterprises offering hunting tourism services.

Hunting tourism activities primarily have Swedish customers (Alatalo, 2003a). Only a small proportion of the hunters are foreign. In northernmost Sweden, the contingent of Finnish hunters is large, just as Danish hunters are a large group among guest hunters in southernmost Sweden. A small proportion of foreign guests area coming also from Holland, Germany, Italy, the USA and Great Britain. However, there has been noticed some reluctance especially towards the foreign hunting tourism groups by the local population. According to the study the entrepreneurs receiving foreign tourists can feel themselves *"a bit of a Judas for bringing foreigners"* (Alatalo 2003a) In general the hunting tourism companies give priority to Swedish hunters. One of the reasons for this can be that it is more demanding to the operators to receive foreign guests as they are more demanding visitor group.

It was found out that the hunting tourism companies have customers from all social groups and income brackets (Alatalo 2003a). It is the interest in hunting rather than the hunters' financial standing that defines the hunting destination at the end. Nevertheless, some differences between hunters could be noted, for example: young hunters choose cheaper hunting alternatives and treetop grouse stalking is especially popular among older hunters. Senior officials and business leaders are over-represented among those pursuing pursch hunting and driven game hunting for cloven-footed game and pheasant hunting. On the other hand the working class is over-represented among those pursuing small game hunting. It is also note that the average age among big game hunters is lower than among bird hunters. (Alatalo 2003a).

The general trend in the hunting tourism sector in Sweden is, that incoming customers from Europe and overseas tend to buy more services, like guiding, that the domestic customers and customers from neighbouring countries. Customers from Sweden, Norway and Finland as well as the local hunters are more independent and mostly only buy a licence. In the last decade, there has been a trend among Swedish customers, both in fishing and hunting tourism, towards using more guides and guiding services.

There are good conditions for hunting in practically every part of Sweden. Such opportunities together with good active entrepreneurship create possibilities to develop hunting tourism activities in Sweden, and thereby new enterprises, new revenue and new jobs. In addition hunting has always played an important role as a key social factor. Neither one can not overstate the recreational function of hunting.

In the last ten years, there has been a radical change in attitudes towards hunting as a phenomenon among Swedish hunting teams, forest owners and hunting organisations. Before, it was just a matter with local importance, but nowdays it can be detected the growing benevolent attitude towards innovative models for hunting in a tourist perspective. The change originates in the hunting tourism's role as possibility of primary and secondary livelihood, generation handover and changed land ownership structure, in combination with a relatively aging population of hunters. It can be seen a generally improved attitude environment towards hunting in organised form. The interest in tourist hunting products among other actors in the tourism industry has increased significantly in past few years, and there is a growing realisation of the economic potential of increased hunting tourism activities.

4. Examples of enterprises

The following chapter aims to give an description of the hunting tourism in Sweden in year 2003. The information is collected from the study *" Jaktturismnäringen i Sverige, Alatalo, M, 2003a. Turist-delegationen"*. The "hunting tourism enterprises" included in the study will now be presented in a general way. Three of the enterprises are established in northernmost Sweden, three in southernmost Sweden and two in the Mälaren region, see Figure 1.

Figure 1. *General map showing the geographical location of the participating enterprises.*

Svanrek AB Artic adventure

The first enterprise is Svanrek AB Arctic Adventure in Svanstein. Svanstein is on the River Torne, approximately 50 km northwest of Övertorneå in Norrbotten County.

Mr Rova started Svanrek in 1990. The enterprise is based on forestry. Mr Rova owns a total of over 5,000 ha of forestland, on which he carried out forestry operations. In combination with forestry, Mr Rova sells events based on hunting and fishing. Mr Rova also sells courses and training, for example survival courses and hunting diploma courses. Mr Rova judges that about 10 per cent of the operations in the enterprise can be described as hunting. *"Forest products can be used in several ways. An important part of managing the property is hunting".*

Svanrek primarily sells moose, small game and bird hunting, but the range offered also includes beaver and moufflon hunting. Moose hunting is bought mainly by German-speaking tourists from Austria, Switzerland, Liechtenstein and Germany. Bird hunting is sold mainly to hunters in the region and treetop grouse stalking to Finns. Moufflon hunting is in a 100 ha enclosure (1 km square).

Visiting hunters often stay in the hunting lodges that Mr Rova has on his hunting land, on a self-catering basis. If needed, Mr Rova arranges prepared food and alternative accommodation in cooperation with other entrepreneurs operating in Svanstein. For distant guests, mainly those from abroad, Svanrek organises transport, for example from the airport in Luleå or the train station in Boden, about 200 km south of Svanstein.

Figure 2. *A sauna in the "Twilight of the Gods" is a must, especially among treetop grouse stalkers from Finland.*

Svanrek sells a total of about 200 hunting days a year, roughly 70 of them for moose hunting. Jan Rova himself works with the activities fulltime, all year. During the hunting season he hires doghandlers, guides, transport and cooking services in the village amounting to a half-year's work (FTE).

Råbelöfs Godsförvaltning AB

The second selected operation in this survey is that run by Råbelöfs Godsförvaltning AB. Råbelöfs Gods is an estate located a few kilometres north of Kristianstad in Skåne County. Over 20 people are employed on the property, and work with plant cultivation, milk production, pig production, forestry and property management. The hunting is connected with forestry and it was Agne Olsson, hunt manager, who provided responses and talked about the hunting activities on the estate. The interview took place in their newly-renovated hunting lodge. Gamekeeper Sven-Erik Nilsson was also present at the interview. Excellent, since Agne Olsson said that after 30 years on the estate, Sven-Erik *"knows the forest like the back of his hand"*.

Since 2000, Råbelöf has been offering buck pursch, battue for boar and deer and shooting geese in flight. The hunting takes place in forests on the estate, in an area covering approximately 2,000 ha. The forest is largely beech and dense spruce. The goose hunt is on the shoreline areas of Råbelöfssjön Lake and Helgeån stream. To increase the supply of birds, mainly duck, the estate quite recently created new wetlands. *"Wetlands have been created to provide good feeding areas for ducks. For this reason, they have been planned to attract game- a natural refinement of the hunting."*

Figure 3. *The road from Råbelöf Manor and estate office to the hunting lodge leads through the estate hunting grounds.*

During one-day hunting, lunch is served in the hunting lodge. Lunch is ordered from a catering firm. Hunters can choose to rent accommodation in the hunting lodge or at Tomarp Farm, a farm hotel near the hunting grounds. Staying in the hunting lodge is on a self-catering basis. The buck hunters generally stay for three nights, since pursch goes on for 3-4 days.

"Each hunt requires thorough organisation for everything to run smoothly and to everyone's satisfaction," said Agne and Sven-Erik. Most of the hunting sessions, an estimated 70 per cent, are booked by Swedish enterprises. Today it is boar hunting which is the most popular. *"Boars do a lot of damage to crops. We put out food for them so that they do not run into the fields."*

Figure 4 *Restaurant section of Tomarp Farm, a farm hotel near the hunting ground.*

Even though the revenue from hunting is considerable in a Swedish perspective, it is insignificant in relation to the total sales of Råbelöfs Godsförvaltning AB. Nevertheless, Agne Olsson describes it as *"Important revenue to the estate"*. During hunts, doghandlers and beaters are employed in addition to Agne and Sven-Erik,.

Wanås Gods AB

The estate of Wanås lies three kilometres from Knislinge, a small community 25 kilometres from Kristianstad in Skåne County. The operations of Wanås Gods AB include hunting, property management and external consulting services. Since 1987, the main building has also housed exhibitions of international and Swedish contemporary arts, everything from sculptures to conceptual installations.

Figure 5. *The eight characteristic buildings in the manor area are listed buildings. Visiting hunters are offered guided tours of the buildings, as well as art tours.*

Sören Hansen is one of a dozen employees on the estate. He is a gamekeeper with responsibilities for game conservation and hunting at Wanås. Sören Hansen is a professional hunter and has worked on the estate for nearly 20 years. Mr Hansen has worked in Canada and Africa. He also worked with instructing future professional hunters.

Of the total estate, approximately 7,000 ha, about 3,000 ha, is forest. The forest mainly comprises pine and spruce. Since 1989, the estate has been offering hunting organised by Hansen. The hunting consists principally of pursch for roebuck, but also pheasant and boar hunting. Roebuck hunting packages usually include five days hunting and seven overnight stays in the estate hunting lodges. The hunters prepare their own food. These packages are mostly bought by Danes. *"The Danes are crazy about buck hunting."* Bird and boar hunting is organised mainly as one-day hunts. These hunts usually include dinner. Hunters usually also buy an overnight stay in connection with these hunts. These hunts are booked by as many Swedes as Danes.

Reproduction among ducks has increased thanks to the estate establishing a dozen duck hunting waters and one big wetland. To further increase the availability of birds, both pheasants and ducks are fed.

The hunters live mainly in the two hunting lodges located on the hunting grounds. They prepare their own food. Occasionally some of the hunters choose accommodation in the manor area. The proximity of for example Kristianstad and Hässleholm means that hunters sometimes choose to stay at hotels, but they arrange this accommodation themselves. *"Roebuck hunters also come in the holiday season and stay with their families in the cabins and examine the grounds with regard to future hunting. Sometimes they help with game conservation."*

In addition to Sören Hansen and his apprentice hunter, extra staff is taken on during hunting. The work input of extra staff corresponds to about two years' full-time equivalent. It is estimated that about 5 – 10 per cent of the estate revenue is generated by hunting.

Häckeberga Säteri AB

Before the interview was with Henrik Tham of Häckeberga Säteri AB. It is an estate located a few kilometres from Genarp in Skåne County. Operations include cereal crops, forestry and rentals, and for the last 15 years have also included hunting. The total staff on the manor estate is around 15. Henrik Tham has just appointed a person to be responsible for game conservation and hunting on the estate. In an economic perspective, about 10 per cent of the estate sales are generated by hunting activities.

The estate mostly offers hunting for cloven hooved game, above all fallow deer, but also to some extent boar, red deer and roe deer. Hunting takes place in an area of nearly 2,000 ha. Besides the hunts run by Tham, large areas of the hunting grounds are leased out.

Figure 6. *Forestry and game conservation make the forests around Häckebergasjön Lake attractive to cloven hooved game.*

Hunting is organised in close cooperation with Häckeberga Castle. Tham's hunters buy accommodation and meals at the castle, which is located close to the manor.

Just like the previously presented operations, Häckeberga Manor hires local people for the intensive hunting days. The work input corresponds to approximately one man-year's employment.

Dorotea Jakt- and Fiskecamp

Near the southern approach road to Dorotea in Västerbotten County lies Dorotea Jakt- and Fiskemuseum, a museum of hunting and fishing. Carl-David Karlsson has this museum as his base, not only for the museum, but also a hunting and fishing camp, an aquarium (with a web camera and nibble-meter), a natural history exhibition, a shop and a tourist information office. Carl-David Karlsson does not live in Dorotea, but commutes weekly to run operations.

Carl-David Karlsson these operations in 1998, but did not start to offer hunting until the year 2001.

About 20 kilometres north of Dorotea, at Kvarnforsen, Mr Karlsson leases 3,700 hectares of land from the forestry company SCA. Here he offers small game hunting. *"Many people have called because there are wolves everywhere. Those who have small beagles are terrified, but they really like to hunt. They think beagles are perfect for that. I have so much land, and those dogs are not so easily distracted. If you are hunting hare, then quite a large number can hunt at the same time"*. Mr Carlson has bought a course centre near the hunting grounds, which he has renovated. The course centre today functions as a hunting lodge, where hunters can buy accommodation. Carl-David Karlsson hires a local catering firm to supply food if the hunters wish for prepared food. Apart from Carl-David Karlsson, there is one full-time employee in the enterprise, and Mr Carlson sometimes requires guides, who are paid by the hour. About 10 per cent of the enterprise's sales are linked to hunting activities. In 2002, Dorotea Jakt- and Fiskecamp sold about 80 – 100 days' hunting.

Figure 7. *The hunting lodge at Kvarnforsen.*

Birribissen Fritid

The village of Rajastrand almost 100 kilometres northeast of Dorotea, in Västerbotten County. The enterprise Birribissen Fritid is based in Rajastrand. Margareta and Per-Gunnar Berg are a married couple and have been running the enterprise Birribissen Fritid together since 1995. the enterprise was named after a mountain near the village. "Birribissen means roughly *'near something sacred'*, says Per-Gunnar Berg. There is an ancient Sami burial site on the mountain.

Mrs and Mr Berg receive hunting and fishing tourists. They estimate that 80 per cent of the guests are hunting tourists. On behalf of the forestry company SCA, Birribissen Fritid offers small game hunting in an area of 16,000 ha. The land is easily accessed because of all the forest roads.

Figure 8. *When the hunting grounds are extensive, hunters are offered a number of different natural environments.*

"There is also a completely untouched area of hunting ground covering approximately 4000 – 5000 ha, where there is ancient virgin forest, which offers birds an excellent habitat," Per-Gunnar told us. Hare hunting is nevertheless the most popular form among the enterprise's guests. "*More and more people come from Värmland/Gästrikland and this is in fact because of the wolf. They say it's impossible to hunt there. They are fleeing the area. Many have lost their dogs."*

The hunters stay at the village hostel, Rajagården, and at hunting lodges on the hunting grounds. The enterprise owns one of the lodges. Small game hunters usually stay for a week.

The enterprise's revenue comes mainly from the service it provides to tourists. The enterprise arranges hunts, ensures that everything functions, and guides them with or without a dog, arranges maps, transport and food deliveries, etc. Today, Mr and Mrs Berg do not get their livelihood from the operations: their work input can be estimated at just over one seasonal job (3 – 4 month's work). When they have many visiting hunters, they usually hire an extra guide.

In 2002, Birribissen sold approximately 200 days' hunting.

Sundsta Säteri

Sundsta Säteri is a manor at Sundsta, halfway between Uppsala and Norrtälje. The manor is owned by Lars and Christina Baalack. Lars was the one who gave the interview, even though he was very busy preparing the manor golf course for the coming season.

Over the years, Sundsta Säteri has developed into a conference centre with a difference, and with a wide range of activities. Closeness to Stockholm is a decisive factor to the operations at the manor. The customer base is 80 per cent Stockholm businesses.

In addition to the golf course, which is laid out on an area of 70 ha, there is a car circuit at the manor, which occupies approximately ca 5 ha. In the mid-1980s, the enterprise began to offer hunting, to hunters with and without experience. Less experienced hunters were offered supervised hunting. In supervised hunting, Lars is responsible for the weapon and constantly accompanies the hunter, giving instructions. Sundsta also arranges courses for the hunting diploma. The manor also has a game meat store. When the game on the estate has become food, it is sold at the store. The manor also leases out approximately 100 ha of arable land. *"Here I decide what crops may be grown – they must be wildlife-friendly - and harrowing is not permitted until the hunting season is over, since we use the land for stubble hunting."*

The manor mainly offers hunting for cloven hooved game (boar and red deer) in a 200 hectare enclosure (1.5 x 1.5 kilometres) and bird hunting (partridge, pheasant and duck). The hunting mainly consists of one-day arrangements with meals, but there are a number of overnight stays at the manor hunting lodge. When necessary, other accommodation is arranged in cooperation with local entrepreneurs. A total of 50 to 60 hunting days a year are sold. Because of the hunting, parts of the arable land, about 70 hectares, have been made into duck hunting wetlands. The purpose is to increase bird reproduction. A fifth of the golf course area is also game biotope. The family are trying to recreate the game biotope of the past *"Before determined farmers came and drained the land and collected rock in cairns"*. There is also fowl rearing on the farm.

Figure 9. *Food is now served in the former Manor store.*

Operations at the manor give a total of 12 jobs (FTE) and two of them can be said to be based on hunting. Some hunting calls for extra doghandlers to be hired. Lars Baalack estimates that about 15 per cent of the sales come from hunting.

Claestorp Fideikommiss AB

The eighth interview was carried out at Claestorp Säteri. It is a manor estate, owned by the hunter Henrik Svensson, who gave the interview and told us about the different kinds of hunting offered by the manor, operations which began in earnest in 1997, when the estate recruited him.

Claestorp Säteri is a manor house about four kilometres south of Katrineholm in Södermanland County. Farming there has changed considerably, and today the biggest crop on the estate's fields is winter grain. When the farm livestock rearing was wound up, much of the fallow land was made into game areas. *"There was a good starting point for the work – a good population of cloven hooved game – all the cloven hooved species: fallow deer, red deer, boar, moose and roe deer."* Today, in addition to hunting for cloven hooved game, there is also pheasant and duck hunting. Pursch for roebuck is the most demanded type of hunting. To increase the availability of birds, Claestorp Säteri, along with other estates, has worked to recreate wetlands. The estate also rears birds. Rearing is on a scale that permits the estate to sells birds to other estates.

The hunting events vary in size and content. When hunting is for a week, the hunters live in the wings of the manor house, with self-catering. They can also choose to have dinner in the castle. Other packages include the hunters buying full board in the castle guest apartment, which was quite recently renovated.

Figure 10. *The manor house has a guest apartment where hunters can stay.*

Henrik Svensson also told us that practically all the fallow deer today found in the Mälaren region, originate from Claestorp. Fallow deer were brought there from Denmark to an enclosure in the 1920s. When the enclosure was removed, the fallow deer gradually spread over the country.

One person is employed for hunting activities in addition to Henrik Svensson, and during the most intensive hunting period, extra personnel are hired.

4.1. A summary of the main economical challenges and problems concerning hunting tourism

There are a number of factors requiring special and urgent attention regarding to increasing the attraction and quality of Swedish hunting enterprises and their products. These factors include safety, game knowledge, customer care and the role of the hunting guide as par of the product. Today Sweden ir relatively advanced in the hunting tourism sector, when compared o other Nordic countries, but there is need for improvement and gaining expertise from more developed countries.

The traditions of hunting tourism certainly play a significant role in development, but nevertheless it should be taken into account that traditions are based on needs and the ability to pass on experiences, and in this area a knowledge gap needs to be filled. Sharing knowledge, business intelligence, accessibility and collaboration should be starting points for focusing on the above, in preparation for future initiatives.

The ability to make one’s voice heard and to present niche products has in Sweden always been a subject for debate and perplexity. The peripheral position of the most of the hunting tourism companies in relation to world does not help. There is a need to find distribution models and services that are long term and sustainable by joining the forces and focusing to the most relevant issues. One model that many of hunting entrepreneurs in Norrbotten region have found to be viable is a proposal to establish a hunting tourism organisation that operates as a hunting event agent, but which in close cooperation with other inter-county players acts as a clear and consistent mouthpiece on issues related to hunting tourism. At the same time the future hunting tourism organisation can act as a bridge to other areas of tourism, which would considerably assist packaging and marketing the products. In this way it might be possible to create a dynamic and thematic organisation, which in the long term will benefit the entire tourism structure in Northern Sweden.

Market communications are crucial in a hunting tourism perspective and it can be seen major shortcomings, not least in maintaining continuity in relations with the international markets. Security and safety are key concepts in hunting tourism, not merely regarding the operative side of hunting activities, but also in relations between overseas hunt agencies and local hunting enterprises. Security in deliverables as well as security in communications counts.

Today there is no specific system for evaluating the quality of the products offered by hunting tourism entrepreneurs. The systems available in Sweden are in general of a more focused to standard nature-tourism forms and do not address the many special aspects of serving hunting guests. Such a system, however, is crucial to make products from Northern Sweden attractive enough to be able to lure and retain customers from the rest of the world.

5. Social sustainability

The main concerns raised by hunters regarding the establishment of hunting tourism activities in their neighbourhood are questions of potential increase in hunting costs for the local people. There seems to be reluctance among local hunters to let anybody else in their hunting area, especially hunters from other countries (unpublished data). At the same time, however, there is also an increasing awareness of the economical potential of selling hunting. In a recent research, half of the Swedish population agreed that a commitment to hunting and fishing tourism can increase job opportunities in the country. In the northern counties, where there are few available jobs, this was even more distinct, and between 60-70 % of the respondents agreed with the statement (Ericsson et al. 2005). The main prerequisites among hunters for agreeing hunting tourism in their neighbourhood are that the abundance of local game will not be affected negatively and that new job opportunities will be created in the region (unpublished data).

The high economic and symbolic value of the moose and the fact that the local hunters are becoming increasingly fewer, especially in the remote areas, without doubt gives the moose as a game species a leading role in the successful development of hunting tourism in Sweden. Concerning selling hunting for the other main species listed in chapter 2, there is usually less opposition from local hunters. One likely explanation for this is that the moose has high economic value (i.e. meat), while there is little value in a grouse or a hare. However, many hunting teams do not allow small game hunting close to or simultaneously with moose hunting season, as it is thought to scare the moose. The future potential for available moose hunting comes from empty areas as local hunters get fewer and the potential of including paying "hunting guests" in the remaining teams with decreasing members. Even though there are signs of increasing interest in small game hunting among locals, especially by new hunters, small game hunting potential is probably largely underexploited today. However, there is little scientific evidence to back up this claim.

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List of the national main actors related to the hunting tourism sector nationally

The Federation of County Agricultural Societies, www.hush.se?

Sveriges Yrkesjägareförening, www.yrkesjagarna.se

Swedish Lapland Hunting Network, www.huntinginsweden.se

Västerbottens Jakt och fiskegille - Västerbotten Hunting and Fishing Association, www.laplandfishing.com

The Federation of Swedish Farmers, www.lrf.se

Sveaskog Forestry, www.sveaskog.se

List of on-going research and development projects in the hunting tourism sector (2007)

Some examples on project activities in the sector:

Adaptive Management of Fish and Wildlife
The overall objective for the program is to create a foundation for a sustainable management of fish and wildlife in Swedish forest ecosystems. At present the expert knowledge in the field is spread on many hands - difficult to value, overview and apply. One important purpose is hence to improve the situation and make it easier for managers to come to wise decisions.

Environmental monitoring and assessment of game animals
This program is a Swedish monitoring program for sustainable development of game animals. The objective is to gather all available game monitoring assessments in Sweden within the framework of the program. Databases of game information and monitoring results are built up and made publicly available. Support for improving quality of data and uncertainty analysis is made available. New monitoring and assessment methods are developed.

At present applications for a new professorship on hunting tourism are under evaluation at the Department of Wildlife, Fish and Environmental Studies, SLU, Umeå. The position will be appointed during 2007

HUNTING AND HUNTING TOURISM IN ICELAND – COUNTRY OVERVIEW

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1. Background information

1.1 The role of hunting in the society

Hunting is generally seen as a common right, available to everyone interested in hunting. Hunting does not have a significant role in Icelandic society. Traditionally it is seen more as a hobby than an business opportunity. Throughout history hunting has not been a big boon for Icelandic farmers, but Iceland was predominantly a farming community well into the twentieth century. With the advent of urbanisation in the mid-twentieth century, city dwellers with roots in the countryside started hunting for leisure.

Hunting in Iceland takes place both on private land, with the landowners permission, and in common land areas. There are some species which are only hunted in special parts of the country duo to the occurrence of the species. E.g. reindeers are only hunted in East Iceland as well as some birds are only found in some special areas.

Iceland has a short history of hunting tourism. The activities associated with hunting are not really actual business activities and the activities that are related to the sector are scattered. There have been, however, few experimental projects done mainly as subsidiary to nature tourism in general.

Generally the role played by hunting in rural development is slim to none, but citing the experiments cited in 1.4. these could be monitored further in order to give an idea where hunting in Iceland might lead.

1.2 The profile of the hunters

The typical Icelandic hunter is male and can be from any income group in society or any occupation, but most likely aged 30 to 60. The total number of those holding a hunting permit in Iceland is about 20.300 to date. The trend in issued hunting permits can be seen in figure 1 below as well as the proportion of the nation holding a permit. Based on the annual issuing of hunting cards it can be estimated that 50% of those holding a permit are active hunters (see figure 1). These last years the number of foreign hunters has been about 80-100 hunters every year or about 1 % of the active hunters (see e.g. figure 2 in terms of reindeer hunting).

[1)] The Research Centre of the University of Akureyri (RHA)
[2)] Icelandic Tourism Research Centre (ITRC)
[3)] Environment and Food Agency of Iceland (UST)
[4)] Organisation of Guides for Reindeer Hunters

Year	Issued hunting cards	Hunting permits	% of the nation
1995	11.516	11.574	6,4%
1996	12.664	14.680	8,0%
1997	11.422	14.787	7,9%
1998	10.671	15.363	8,1%
1999	10.655	15.966	8,3%
2000	10.588	16.499	8,4%
2001	10.613	17.057	8,5%
2002	10.685	17.576	8,7%
2003	8.518	17.874	8,8%
2004	7.725	18.583	9,0%
2005	10.512	18.828	8,9%
2006	10.032	19.470	8,9%

Figure 1: *Hunting cards and hunting permits annually Source: Umhverfisstofnun, 2007*

1.3 Trends in leisure hunting

In Iceland there is not any actual data for leisure hunting trends, but if we make an example of reindeer hunting in Iceland it is clear that leisure hunting is increasing. Just a few years ago the applications for hunting reindeer were fewer than the applicants, so the hunter was guaranteed a licence to hunt a reindeer and sometimes the hunter could get more than one. Today, on the other hand there are more than 2700 applications for a quota of 1100 reindeer (see figure 3). Other examples also support our estimation on the increasing trend of leisure hunting, but these are elaborated on in 1.5.

1.4 The organisational structure

In Iceland there are a few hunters' organisations, most of them with a few hundreds members, but the biggest with approximately 2000 members. The role of these organisations is in general to sustain a unified stance guarding the interest of those interested in shooting, hunting and nature conservation

All hunters in Iceland who intend to hunt birds and mammals are required to obtain a hunting license and then to get a hunting card which is valid for the period of one year, from 1st of April – 31st of March the following year. When the hunter wishes to renew his hunting card he must issue a bag report for all hunted species.

The Environment and Food Agency of Iceland (UST) runs two certification courses. One course is a certificate program for those who apply for a gun license. This course is usually the predecessor of the hunting certificate programme and does not give rights to hunt, only rights to own a gun. Today these courses are run consecutively as the majority of the applicants intend to go hunting. The hunting certificate program is a course covering various lessons about hunted species, hunting seasons, ecology, ethics, etc. The course's standards and objectives are the same regardless of where in the country the certificate program is held. The requirements are that the hunter achieves 75% in a test at the end of the course. Registration and management of both of these certificate programs is run through The Wildlife Management Division of UST.

1.5. The legislation and actors regulating the hunting and hunting tourism

Landowners have the hunting rights to their own property, regardless of whether it is large or small. If landowners do not want to exercise their right, they can lease out their land in whole or in part to individuals or enterprises. Most of Iceland is owned by farmers, but in the last decade enterprises such as various investment holdings, pension funds and fishing clubs have been purchasing land. The parts of Iceland that are not privately owned are common land areas. The boundary between common and private land is being demarcated at present through a massive government initiative The impetus for privatisation along with the government demarcation of the common land can perhaps change the hunting culture as some areas are being closed off as private whilst others opened up. Those open are under mounting pressure, especially in areas close to the capital city. The areas with by far the most developed hunting culture are those of East Iceland, where the reindeer populations are. There special reindeer hunting guides, who are mainly local farmers/hunters, take Icelanders and foreigners alike to hunt reindeer. Today 84 individuals are registered as reindeer hunting guides and all the guests hunting reindeer are legally obliged to have a licensed guide with them.

The legislative body regulating hunting in Iceland is The Environment and Food Agency in Iceland (UST) but it operates according to several legislative acts. For hunting and wildlife management the most important act is Act no. 64/1994 on hunting and control of birds and wild mammals. UST is the supervising authority and through Wildlife Management Division it controls all game management, shooting and hunting courses, issuing hunting licenses and hunting cards, and data management.

For hunting birds and small mammals only a valid hunting card is needed, but for reindeer hunting a reindeer hunting license for each bagged animal is required. Icelandic landowners have no special hunting rights in terms of the amount of the bag. They only have the basic hunting licence to their own land area. If they want to hunt reindeer they have to apply for a reindeer hunting license like other hunters.

Monitoring of hunted species in Iceland is controlled by The Icelandic Institute of Natural History along with other Icelandic conservation organizations.

2. Ecological sustainability

2.1 Main game species

Potential species concerning hunting tourism in Iceland are Reindeer, Pink-footed goose, Black-birds, Artic fox and Ptarmigan.

Reindeer: The population is growing and has been growing in recent years. The supervision is good and the population is counted every year. There is an increasing interest for hunting reindeer and actually the demand for licence to hunt reindeer has exceeded the number of offered licences (see figure 3). The tourism around the hunting is developing.

Pink-footed goose: The population is large and has been growing the last decades. Numbers from around 1950 showed an estimated 33.000 individuals and today the population is calculated to be over 300.000 individuals. The monitoring of the pink-footed goose is very good and the population is counted every year. There is an increasing interest for hunting this species but they usually stay in places which are quite isolated so hunting them is a challenge. There is a good possibility for more hunting and also build up tourism around that.

Black-birds: *(Common Puffin, Black Guillemot, Brunnich's Guillemot, Common Guillemot)* The populations of these sea-birds are large (millions of individuals). Hunting of these species is a very small portion of the whole populations. Monitoring is fragmented. Good possibility for more hunting and these species can easily be utilized better without the danger of being over hunted.

Arctic fox: The population is growing and supervision is very good. There is an interest for hunting and the population can easily withstand more hunting without the danger of over hunting.

Ptarmigan: Much fluctuation in the population but good supervision. There is much interest for hunting and this is the most controversial of hunting species in Iceland. Tradition dictates that ptarmigan are choice birds for the Christmas table of some families, but the sustainability of the species population is hotly debated. What best reflects this controversy is the role played by the minister of the environment in setting a total ban for hunting the ptarmigan in 2003-2004.

Generally speaking the species discussed above are specifically mentioned as we believe them to be able to sustain hunting tourism on a prolonged basis. Thus it is our contention that these species and these alone should be further developed in terms of hunting.

3. Hunting culture in Iceland

Icelandic hunting culture can generally be subdivided into the following three categories.

Reindeer

Reindeer hunting only takes place in East Iceland where the reindeer stay in the heath and moor lands of the highland interior of Iceland during the hunting season (15th July till 15th September). Hunters go to the hunting grounds on 4x4s where they can pass, but often they are required to walk and some even may use the helicopters to gain access to the hunting grounds. In the past the hunters went often on horseback, but it is not that popular anymore.

All hunters must hire a guide, who helps them in the hunt and monitors the grounds at the same time. This is a legal requirement. As mentioned earlier there are listed 84 guides in Iceland, but all these guides are not active ones. Some guide dozens of hunters during the season, while others will only take a few individuals each summer and some none. The hunting trips are of varying lengths from only a day up to a week, but almost always the hunt ends with a kill. The guides are under severe pressure on these trips as they have to know the area well, monitor the animals and be in good contact with other guides in the area and mediate information. The estimate is that each licensed guide puts in at least a full days work for each hunting licence issued, thus those that are most active are significantly employed. The hunters pay for the services of the hunting guide as part of their tour package.

The price for each hunting licence for a reindeer is in all opinions moderately set and thus reindeer hunting is considered a public sport that all can take part in; buy the licence and hire a guide. Each guide is allowed to take a maximum of three hunters for each trip. The hunting trip is more often nowadays a social event and an occasion for friends as a group to hire a guide and take the trip. A majority of the hunters hunt for the meat, but a few hunts also for the trofee, seeking those animals with the most developed antlers, stuffing the heads or even the whole animal for show. Most hunters cure their own meat with the help of the guide, but the meat that is to be sold in the open market needs to be taken to a licensed meat processing plant and get inspected by a health official. The market price for the meat is very high.

Other mammals

Those having a gun licence can hunt seals in Iceland with the permit of landowners. All hunters can shoot arctic fox and mink, but these are also actively hunted by municipal initiatives and each animal caught is paid for. The government is aiming for the extermination of the mink and in 2007 three municipalities are taking part in an experiment to see if total eradication is possible to gain.

Bird species

The hunting of those bird species, that are considered a pest in Iceland has become popular amongst hunters, the seagulls and raven are amongst these. Geese and ducks are hunted as well on private lands and farmers will often be paid in kind, e.g. through help on the farm or rounding up sheep in the autumn. The ptarmigan is hunted on private land with landowner’s permission or in the common land often with the farmer’s help.

4. Economical sustainability

4.1 The hunting tourism in Iceland

In Iceland there are only three companies, which are directly specialised in to hunting tourism or selling hunting tours to potential visitors. In addition to these there is a handful of tour operators that offer hunting as a theme in some of their tours. According to information from the Icelandic Tourist board, two of the three companies that are directly specialised into hunting tourism are applying for a tour operator licence. One company is advertised as specialising in hunting on Visiticeland.com, but without a tour operator licence. The two that are applying are Veiðiþjónustan Strengir (www.strengir.is), although specialising more in fishing, and The Icelandic Hunting Club (www.huntingiceland.com). The both companies are family busienesses. This company structure and ownership also applies to other tour operators that have hunting as part of their general itinerary.

To be able to estimate the amount of hunting that takes place by foreign nationals we can only use the number of hunting cards issued. All those that hunt in Iceland, need to have a "veiðikort" i.e. a hunting card. As mentioned above about 80-100 foreign nationals are issued hunting cards, representing about 1% of active hunters. Similarly in terms of reindeer hunting the number of foreign nationals issued with a reindeer licence ranges from 1-4% of the total licences issued. This can be seen below in figure 2, showing an increase in licences issued, but similar number of foreign nationals each year.

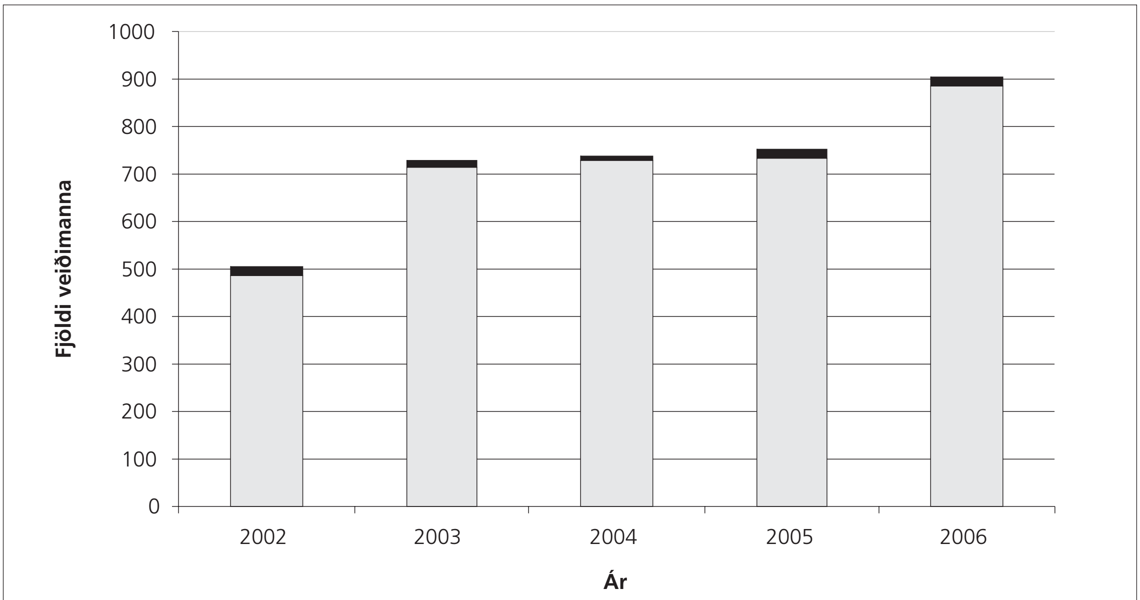

Figure 2: *The number of hunting cards issued per year compared to foreign nationals. Source: Umhverfisstofnun, 2007.*

As it can be seen, the amount of hunting cards has remained relatively steady since 2002, but the figures going back as far as 1997, show that the amount of hunting cards has been at almost on non-existent level. This means that there is growth potential as hunting licences in Iceland are still issued to all those that seek them provided they fulfil some basic requirements.

Other companies that market hunting in Iceland are listed below. These are accessible to the regular tourist and are marketed via the internet. Some examples in the following list:

Iceland-America.com
Hunting.is
The Icelandic Hunting Club
Global Sporting Safaris
Four Star Hunting Adventures
Lax-á
Luxury Adventures

4.2. The most potential customer groups

To date hunting has mainly been marketed for American visitors. The people that do come are from the US, Canada and Southern Europe. These are few in number, but do represent the markets, where development and marketing work has been undertaken to some extent and could be developed further. As a result of NPP-Hunt project on the other hand, we could hope to see Scandinavian hunters come to Iceland, mainly to hunt game unavailable in other Nordic countries or even illegal to hunt.

When looking at specific game species, the reindeer is by far the most popular species and judging from the recent increase in licences applied for and awarded the greatest growth potential could to be in reindeer hunting (see figure 2). Before 2000, demand was less than supply and those seeking licences could usually get more than one. In the years 2000-2002, proceeding the years showed on figure 3, showed that there was developing a growing trend. In those years surplus was evident in specific areas, mainly to the west of the main town Egilsstaðir, along route 1. This area is by far the most productive reindeer area and usually around 45% of licences are allocated there (apart from 2006 where 61% of licences were issued there). Figure 3 shows how applications and awarded licences have soared in the last couple of years.

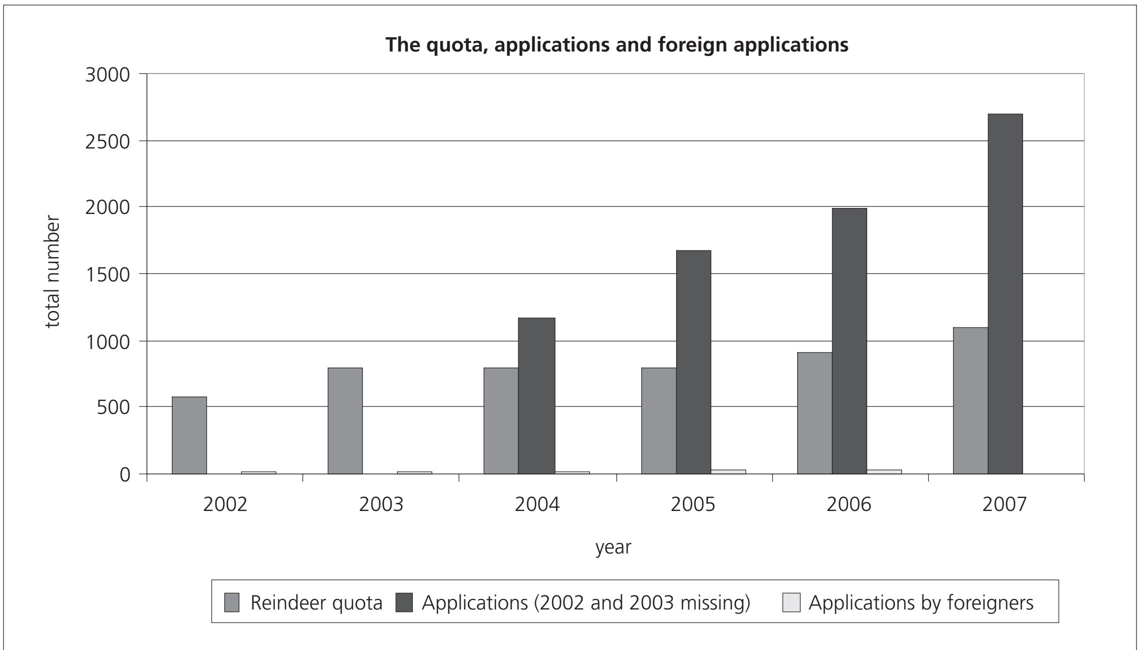

Figure 3: *Annual quota and applications by Icelandic and foreign hunters. Source: Umhverfisstofnun, 2007*

As it can also be gleaned from the above figure, foreign nationals are not prominent in seeking licences for reindeer hunting. The question remains how many of those applying are tour operators applying for potential customers of theirs.

Guided hunting tours are almost solely in reindeer hunting, although salmon fishing often entails guided services as well. Whilst hunting reindeer the hunter is required to have a licensed guide, hunting other species no such requirement needs to be fulfilled. A few guides offer services for geese and duck hunting.

4.3 Hunting tourism as part of rural tourism, the current situation

Hunting tourism has great potential and already has considerable impact in the East of Iceland. The extent of, and the economic impact of tourism and hunting tourism in particular is not known in the East, or any other part of Iceland for that matter, as the figures have not been kept separate in the national budget. With the advent of tourism satellite account in the national budget late in 2006, this situation will be remedied.

Those offering guided tours most likely have the potential to gain considerably from services rendered during the reindeer hunting season as they rent specially equipped vehicles, accommodation, catering and other special equipment. Outside the East of Iceland the potential for hunting tourism has been explored, mainly in the Borgarfjörður region where landowners, in cooperation with the local farmer's association, have been exploring the potential of leasing land for hunting, especially of bird species, such as geese and ptarmigan. This initiative is based on the mounting pressure on hunting grounds near the capital and the farmers wanted to explore opportunities for leasing land for hunting to city dwellers. So far the experiment is in its infant phase and not much can be said about success or failure yet (Sigríður Jóhannesdóttir, Búvest). On the Snæfellsnes peninsula and Húnavatns region the municipality has unilaterally decided to collect a fee from all non local hunters hunting birds in the area. The legitimacy of this exercise is being tried at court at the moment. Another experiment that can be mentioned here, although this one is only in the idea stage, is the initiative from the West fjords region of Iceland and entails hunting for arctic fox. The arctic fox is considered a menace and the authorities pay for each caught.

The hunting mainly takes place in the off season for regular tourism so these initiatives and hunting tourism in general can help in expanding the tourist season in peripheral areas.

4.4 Some statistics on the nature tourism in general

Tourism in Iceland is growing in terms of visitor numbers and the increase has been an average of 6,4% annually since the 1960s. If the curve representing visitor numbers in the figure below is extrapolated, e.g. to the year 2015, the estimated number of arrivals is 650.000 for a country that has a population today of just over 300.000.

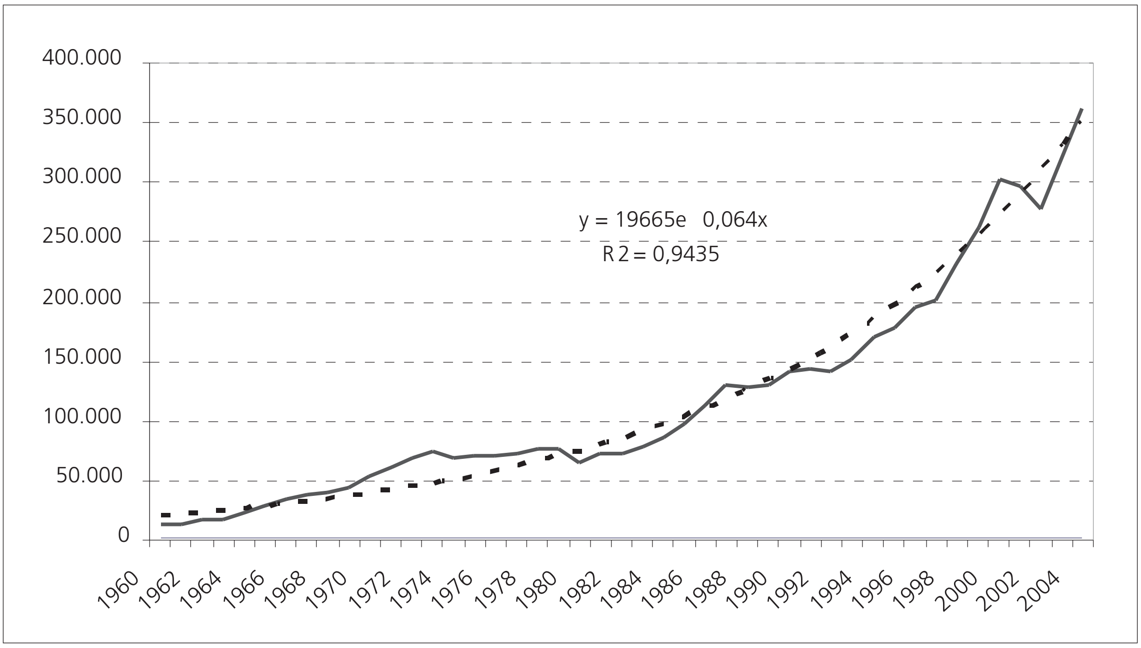

Figure 4: *The number of visitors in Iceland from 1960 till 2004. Source: The Icelandic Tourist Board, 2007.*

It need to be kept in mind, that though the numbers displayed in figure 4 represent the total number of people showing a foreign passport at the air terminals departure gate. Thus migrant workers and various other purpose travellers are represented here as well. To realise the role of tourism in rural areas the below figure demonstrate the problem facing rural tourism in Iceland. As it can be seen the number of overnight stays, which are almost 60% concerning foreign nationals, soars in the summer in the rural areas whilst increasing moderately for the capital region.

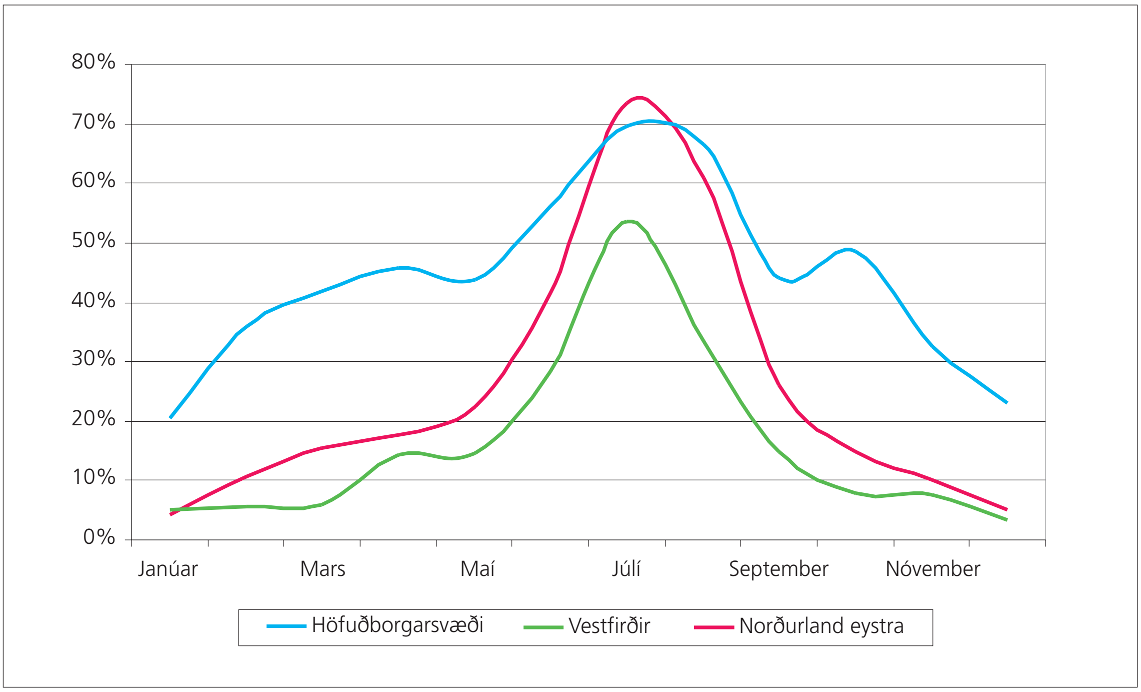

Figure 5: *The percentage of accommodation used in three areas in Iceland over the course of 2004. The capital area is blue, the Westfjords are green and the NE of Iceland is in red. Source: Jónsson et.al. 2006.*

Judging from the above figure anything that can draw visitors to the rural areas in the shoulder season or off-season would be welcomed by at least those operating with accommodation sector. As mentioned bird hunting seasons for the species most popular is in the shoulder and off season.

4.5 Description of typical hunting tourism enterprises

The two cases described are the both companies applying for a tour operating licence form the Icelandic Tourism Board.

The Icelandic Hunting Club (IHC)
The IHC offers tours hunting reindeer, ptarmigan, seabirds, seals and geese. Their hunting tours are all 5 to 6 days long and entail a transfer form the International airport to the hunting lodge, a mountain cabin, all food and lodging and weapon services. Due to the special nature of land ownership in Iceland all bird species can be hunted in the common land areas and thus landownership issues needs not to be negotiated. Although it is often the case that specific landowners cooperate with the tour operator allowing them access to their land for specific hunting. The services also entail clearing weapons through customs and acquiring the licences needed. The IHC advocates small hunting groups, for best results only two per party and market their products via the internet mainly for the American markets.

Veiðiþjónustan Strengir
The company is specialised into fishing and mostly into salmon fishing in Icelandic rivers. They focus mainly on the domestic market and offer an all inclusive package of a flight transfer to the east of Iceland and vehicle transfer to a deluxe hunting lodge. There they emphasise entertainment and food along with hunting and fishing depending on the weather. Their tours are tailor made to each customer group.

4.6 A summary of the main economical challenges and problems concerning hunting tourism

The main economic challenge is the seasonality of Icelandic tourism in general. Another challenge is the amount allowed to be hunted of especially reindeer and ptarmigan, which are the two most popular hunting species. The decisions made for the quota of the latter are often whimsical and politically prescribed.

5. Social sustainability

Even though the hunting tourism sector is still in it's initial phases in Iceland, there can already be identified a few questions that need to be taken in consideration in the further development aspirations and activities.

Especially important is to find solutions on how the benefits of this kind of tourism activities can accrue to the farmer selling the licences. The challenge is to maintain hunting as a viable farming diversification option with the benefits not being sifted off by larger tourism retailers. Co-operation through local branches of the national Farmers Association seems to be one open option.

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Jónsson, Á., Friðbertsson, N.T. and Ásbjörnsson, Þ. 2006: Hagræn áhrif ferðaþjónustu. Greint eftir svæðum á Íslandi. Akureyri: Icelandic Tourism Research Centre, p. 33.
Sigríður Jóhannesdóttir, Búvest
www.hreindyr.is

List of the main actors related to the hunting tourism sector nationally

UST, http://english.ust.is/

Landowners association

Reindeer hunting Guides

Few tour companies:http://www.huntingiceland.com/ http://www.nat.is/

National and regional hunting clubs

List of the on-going research and development projects in hunting tourism sector (2007)

- Búvest, http://www.buvest.is, http://www.bondi.is/landbunadur/wgbi.nsf/key2/english
- Húnaþing og Snæfellsnes
- Þingeyri á Vestfjörðum
- Hreindýr á Austfjörðum

OVERVIEW OF THE BIG GAME OUTFITTING INDUSTRY IN NEWFOUNDLAND AND LABRADOR, CANADA

John Hull[1)], Carol Patterson[2)] and Greg Davidson[3)]

1. Introduction

1.1 Overview of the industry

The big game hunting experience in Canada's most easterly province, Newfoundland and Labrador, is recognized as among the best in North America. In 2005, the outfitting industry contributed approximately $37 million to the provincial economy generating significant employment opportunities throughout rural regions of the province. According to statistics compiled by the Newfoundland and Labrador Outfitter's Association (NLOA), the big game market contributes an estimated $7000 in direct and indirect spending per tourist annually from June to November (NLOA 2006a).

Since the 1980s, the outfitting industry has expanded rapidly. From 1988 to 2003 the number of lodges in the province increased from 83 to 193 with non-resident moose and caribou license sales increasing from 1361 to 4878 during the same time period (NLOA 2006a). The sector's growth over the last three decades is attributed to: the high success rates, the pristine character of the province, the relatively low competition for resources, and the high quality of tourism services offered by outfitters. As the industry has expanded, local operators have responded to market demand by upgrading and improving their roofed accommodations, prepared foods, guide services, air charters, and public transportation.

In the 1990s, the adoption of provincial policies aimed at encouraging the development of higher quality lodges and services helped to promote the continued growth and sustainability of the industry. The increased availability of non-resident licenses, the provision of longer term leases on Crown Lands, the establishment of buffer zones to stabilize resources used by lodges, and increases in lodge license allocations all assisted in reorienting the industry to higher spending markets.

These efforts, in combination with government led marketing efforts aimed at new markets all enabled the tourism outfitting product to become a platform from which lodges are now extending their offerings in other seasons. Snowmobiling, wildlife viewing, nature/culture interpretation, and ATV excursions are a number of experiences being packaged to diversify the industry and to maintain the industry's viability and profitability over the long-term.

In 2006, a number of challenges are threatening the sustainability of the industry. Since 1999, there has been a freeze on new construction of consumptive lodges. The results from the 2006 outfitter's survey also reveals a number of negative changes affecting the overall quality of the outfitting product that include: conflicting land use with logging and mining operations, unfettered cabin development, poor access to and within the province, as well as restrictive government regulation of the industry (DTCR 2006d). As a result of these changes, government and industry have commissioned a plan to define a new direction for the industry over the next ten years.

[1)] *Intervale Associates, Inc and Associate Director, New Zealand Tourism Research Institute (NZTRI).*
[2)] *Kalahari Management, Inc.*
[3)] *Linked Communications, Inc.*

This article is organized into six sections. The first section provides an introduction to the big game industry in Newfoundland and Labrador and summarizes the research methodology. Section Two provides an overview of the province's big game resources with a specific focus on the health and quality of wildlife resources. In Section Three the outfitting product is summarized with a review of the size and quality of the industry, the economic impacts, present diversification strategies, human resource needs, and competing land issues. Section Four then presents a review of the provincial and federal regulations that are currently in place to manage the industry. Section Five outlines market demand in a context of present conditions and trends, as well as the provincial marketing strategy for outfitting. Section Six provides conclusions on a way forward for over the next ten years.

1.2 Methodology

Primary and secondary research methods are adopted to summarize the conditions affecting the outfitting industry in Newfoundland and Labrador, Canada in 2006. The primary research methods included a survey of outfitters in the province (98 out of 153). Outfitting in Newfoundland and Labrador includes both big game and fishing establishments. For the purpose of this report however, statistics for outfitters offering big game hunting or both big game hunting and fishing are summarized. Data from outfitters operating only fishing camps are not included.

In addition, focus groups and consultations with key stakeholders in industry and government also provided qualitative data to evaluate management needs. A review of industry reports, journal articles, and books provided secondary data to clarify the state of affairs of the industry.

These baseline data were collected as part of a joint industry/government contract awarded to Intervale Associates, Inc in 2006 to propose strategic planning recommendations for the provincial outfitting industry over the next ten years.

2. The Resource

The big game resources in Newfoundland and Labrador include the moose, the caribou and the black bear.

2.1 Moose (Alces alces)

The moose is the largest member of the deer family in North America. Moose are native to Labrador and introduced to Gander Bay, Newfoundland in 1878 and Howley, Newfoundland in 1904. They frequent wooded hillsides of rocky mountain ranges as well as the margins of ponds, lakes, and rivers of the boreal forest and swamps. On the northern tundra they frequent boggy areas. Moose are herbivores and feed on twigs, leaves, and shrubs such as birch and maple. They also feed on aquatic plants.

Their lifespan is twenty years or more. On average an adult moose stands 1.5 – 1.8 metres (5 – 6 feet) high. Males weigh 385 – 534 kg (850 – 1180 lbs) while females weigh 270 -362 kg (600 – 800 lbs).

Moose is a prized animal, important for meat and trophies. The first official hunting season for moose in Newfoundland and Labrador was in 1930. On the island of Newfoundland, moose population estimates climbed from approximately 70,000 animals in 1975 to 140,000 animals in 1998. Since 1998 there has been a population decline, with the number of animals in 2005 totaling approximately 120,000 animals (Figure 1) (DEC 2006b).

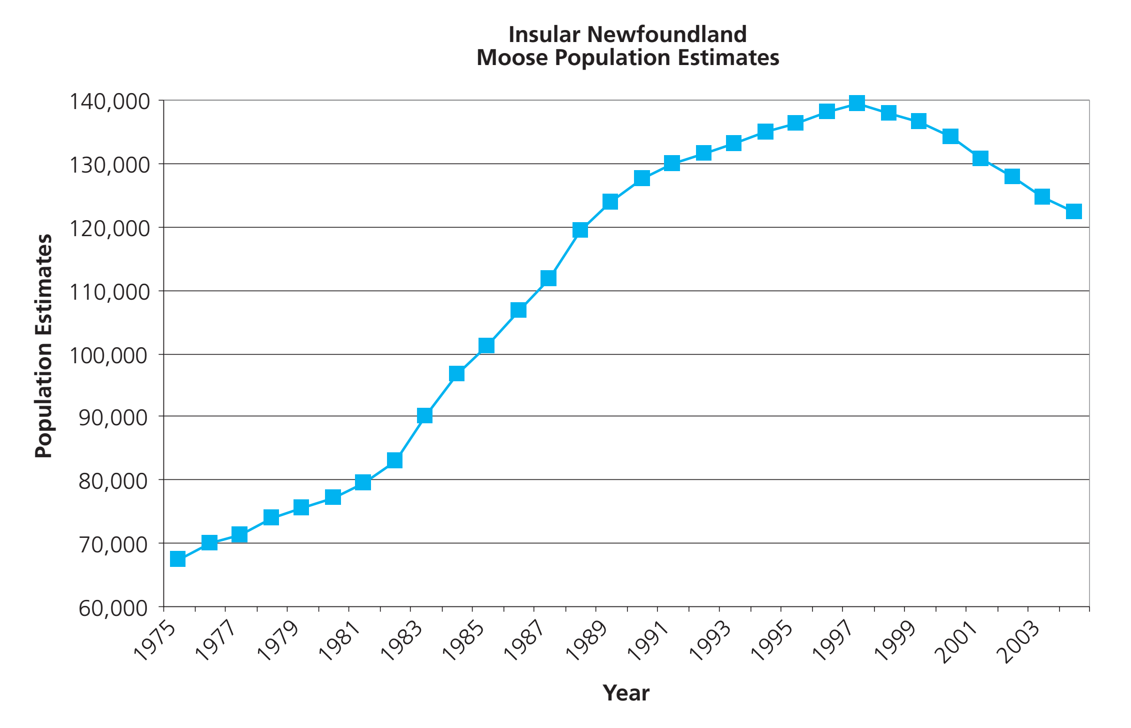

Figure 1: *Moose Population Estimates, Island of Newfoundland. Source: DEC 2006b*

Big game populations are managed through a series of management areas often referred to as wildlife management units, (WMU), wildlife management regions or wildlife management zones, (WMZ). Generally each wildlife management zone or unit has an allowable harvest for each species of big game. The island of Newfoundland has 49 Moose Management Areas (MMAs) (Figure 2).

__Figure 2.__ Moose Management Areas (MMAs). Source: DEC 2006a

A total of 26255 moose licenses are available for 2006-2007. There are 13 755 either sex, 12 380 male-only or calf, and 100 female-only or calf licenses, representing a decrease of 205 total licenses from 2005-2006. Average success rates on the island are 65.6%. Approximately 10.5% of licenses (2 757) are designated for non-resident hunters (DEC 2006a).

In Labrador, there are 15 Moose Management Areas (Figure 3, DEC 2006a).

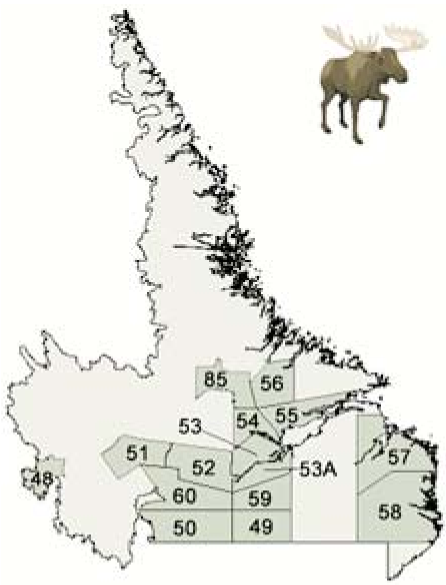

__Figure 3.__ Moose Management Areas in Labrador.Source: DEC 2006a

In 2006-2007 there are 185 moose licenses available, representing an increase of fifteen licenses over 2005-2006. Because moose populations in Labrador are smaller than on the island, there is a less significant hunt.

2.2 Caribou (Rangifer farandus)

Caribou are native to Newfoundland and Labrador. There are two sub-species, the woodland caribou, located on the Island and the barren ground caribou located in Labrador. The George River Herd in Labrador moves between forest and tundra in Quebec and Labrador and is the largest herd in Canada, numbering approximately 450 000 animals (DTCR 2005c).

In the summer caribou can be found on barren lands, while in winter they tend to frequent mixed forest and more sheltered areas. Caribou are herbivores and feed on lichens, grasses, sedges, birch and willow leaves and various mosses. The average lifespan of caribou is fifteen years. Average weight for males is 180 kgs (400lbs), 135 kg (300 lbs) for females. They stand about 1.05-1.2 metres (3.5-4 ft) in height.

Caribou is the only genus where both sexes are antlered with antlers spreading up to 1.5 metres (5 ft) wide in some cases (DEC 2006b).

From 1954 to 2000 the population of caribou on the island steadily increased to approximately 98 000 individuals. In the 21st century there has been a declining population with numbers in 2006 at approximately 75 000 individuals (Figure 4)
(DEC 2006b).

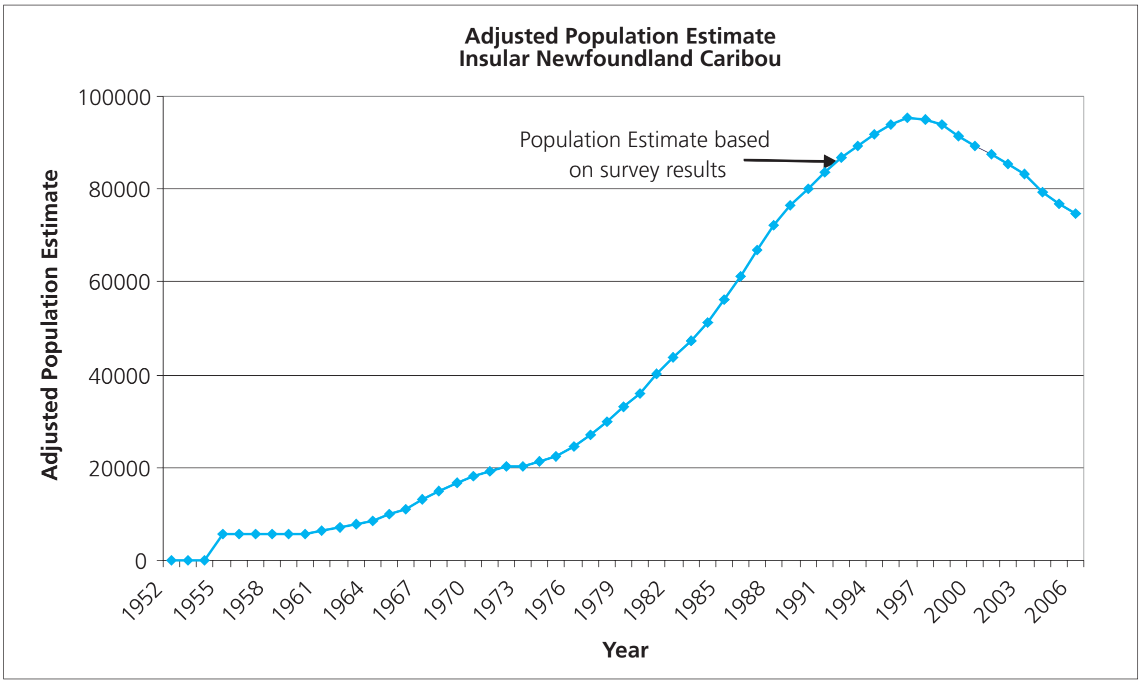

Figure 4. *Woodland Caribou Populations on the Island of Newfoundland Source: DEC 2006b*

The island of Newfoundland has 19 Caribou Management Units (CMUs) (Figure 5).

Figure 5. *Caribou Management Units (CMUs) Island of Newfoundland. Source: DEC 2006a*

In 2006-2007 there are 4 635 caribou licenses available, 2 000 either sex, 2 635 male-only. Of this total, approximately 25% are available for non-residents (1 159). Overall success rates for caribou on the island are 62.2%. From the 2005-2006, the number of licenses has decreased by 970.

The quotas from the caribou population on the island reveal that there is a general decline across the island. Predation by bear and coyote have been mentioned as possible factors that maybe contributing to the decrease in numbers but this is not yet confirmed through scientific research. Disease has also been mentioned as a factor that may be influencing mortality rates.

In 2006, the Minister of Environment announced a two year caribou monitoring program and caribou management strategy for the woodland caribou in response to declining numbers. Representatives from public and private agencies have formed a working committee to identify a strategy for management (DEC 2006a).

In Labrador there are several distinct populations of caribou. The George River Herd ranges throughout the northern half of Labrador and in Quebec. The Red Wine, Mealy Mountain, and Lac Joseph herd are located in the central and southern regions of Labrador and are presently protected under the province's Endangered Species Act.

Approximately 5 100 non-resident licenses are available annually to harvest the George River Herd in the designated 18 Caribou Management Units (CMUs). The CMUs open and close as caribou migrate through them. At least three days notice is given prior to closing. Non-resident hunters are permitted to take two barren-ground caribou on each license and have success rates over 90% (DTCR 2005c).

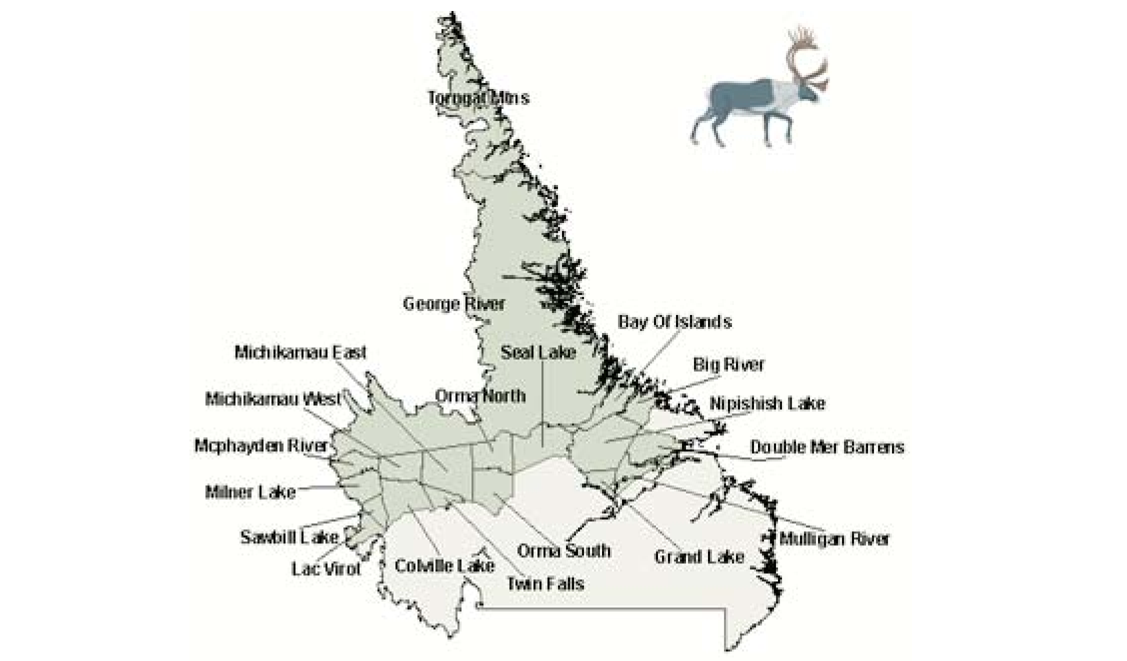

Figure 6. *Labrador Caribou Management Units Source: DEC 2006a*

2.3 Black Bear (Ursus americanus)

Black bear are native to Newfoundland and Labrador residing in heavily wooded areas and dense bush land. They feed on berries, nuts, insects, fish, small mammals, birds and newborn mammals such as caribou.

Black bears on average are 150 cm long with a height of 100-120 cm. Males on average weigh 135 kg, while females are smaller, weighing 70 kg. The bears of Newfoundland and Labrador tend to be larger than those on the North American mainland as a result of a genetic disposition toward larger size as a result of low hunting pressure (DTCR 2005c).

There are an estimated 10 000 black bears on the island of Newfoundland. The 49 management units for moose are also utilized for black bear (Figure.7). In Labrador, there are three management units – Torngat Mountains, George River and Labrador South (Figure 8).

Figure 7. *Black Bear Management Units: Newfoundland Source: DEC 2006a*

Figure 8. *Black Bear Management Units: Labrador Source: DEC 2006a*

For the recreational and commercial hunt, two bears are permitted, either sex in all open zones. Female bears accompanied by cubs may not be taken. From 2000 to 2005, there were 2 290 licenses available for hunting black bear on the island (DEC 2006a). There are no statistics available for Labrador on the black bear. Black bear populations are stable and with the province's reputation for large bears, there is an opportunity to offer a world class experience (DTCR 2005c).

2.4 Quota and License Trends

Statistics from the Department of Tourism, Culture and Recreation reveal that trends in non-resident big game quotas and licenses vary depending on the species (Table 1). On the Island, moose quotas have declined slightly from 2990 to 2918 from 1999 to 2005 with license sales decreasing from 2875 to 2719 over the same period.

Island caribou quotas increased from 1999 to 2005 from 1517 to 1960. In 2006, however, the quotas have fallen to 990 as a result of rapid population declines. Island bear quotas have remained steady at 2290 with license sales fluctuating around 1000. Labrador caribou quotas have increased from 1999 to 2005 with license sales increasing from 312 to 766 (DTCR 2005d).

Table 1: *Big Game Quota and License Trends 1999 to 2005*

	ISLAND MOOSE		ISLAND CARIBOU		ISLAND BEAR		LABRADOR CARIBOU	
	QUOTA	SOLD	QUOTA	SOLD	QUOTA	SOLD	QUOTA	SOLD
2005	2918	2719	1960	1310	2290	929	5100	766
2004	2918	2659	1960	1296	2290	1046	5100	702
2003	2918	2796	1960	1460	2290	986	5000	837
2002	2918	2749	1960	1446	2290	1048	5000	608
2001	2918	2666	1960	1308	2290	N/A	5000	312
2000	2941	2973	1642	1567	2290	N/A	5000	N/A
1999	2990	2875	1517	1227	2290	N/A	5000	N/A
Source: DTCR 2005d								

In general moose, Labrador caribou and black bear quota and license trends are stable with opportunities to further maximize license sales and revenues from these species. Due to the decline in Island caribou quotas, these animals have become an increasingly scarce commodity and prices for these hunts should be re-evaluated and elevated if woodland caribou become increasingly rare.

3. The Big Game Outfitting Industry

The outfitting industry in Newfoundland and Labrador is represented by 153 outfitters representing 165 separate operations (DTCR 2006f). The recently completed survey of outfitters reveals that 21.4 % offer hunting packages and that the majority (55.1%) offer both hunting and fishing opportunities (DTCR 2006d).

Survey results show that the majority of outfitters have been in business for over ten years (76.2%/hunting, 63%/both). In summarizing the physical infrastructure of the operations, 76.9 % have at least one or two lodges with only one fifth of outfitters also using tent camps. The Newfoundland and Labrador outfitting sector does not depend on a large number of mobile camping accommodations but provides more permanent physical infrastructure, offering more amenities. Approximately 70 % of the lodges are well-equipped with hot running water, flush toilets, showers or bath, electricity, refrigerators, and propane ranges (DTCR 2006d).

Figures 9 and 10 provide a spatial distribution of the outfitting industry in the province. The majority of outfitters based on the Island of Newfoundland are located in western Newfoundland with the highest concentration of camps on the Great Northern Peninsula and in the southwest corner of the province. Outfitters offering both hunting and fishing are located primarily in western and northern Labrador with outfitters in northern Labrador now under the jurisdiction of the Nunatsiavut Government and the Inuit Land Claims Agreement. The spatial distribution illustrates the importance of the outfitting industry to the rural regions of the province.

Figure 9. *Hunting and Fishing Camps Newfoundland. Source: DTCR 2006f*

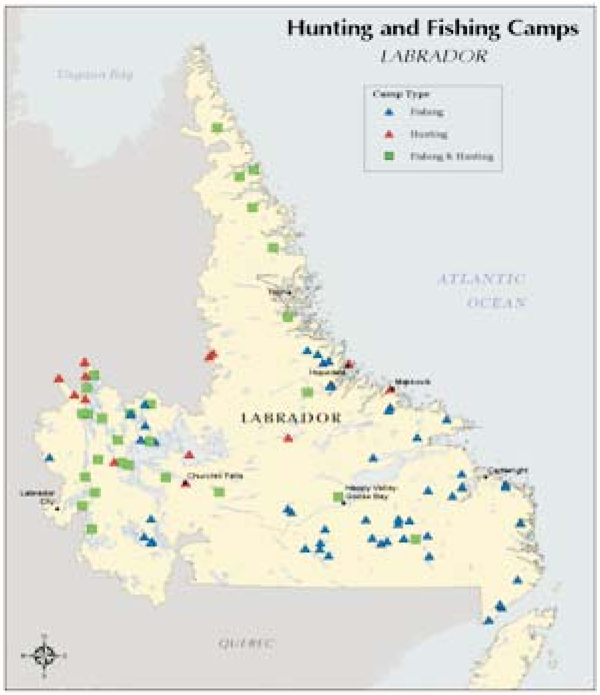

Figure 10. *Hunting and Fishing Camps Labrador Source: DTCR 2006f*

3.1 Big Game Statistics

The statistics for the big game hunting sector provide a summary of the big game quotas, license sales, and average price of hunts in the province. The average length of stay for hunting guests is about six days. Most (82%) of outfitters have a quota for moose. The Department of Tourism, Culture and Recreation (2005) reports that there are 70 outfitters offering moose packages in the province. Almost half have a quota of 30 or more moose per year. The average price of a one week moose hunt is about CAD$3600.

The majority of hunting outfitters (84%) have a quota for caribou. On the Island there are more than 60 outfitters with woodland caribou packages while in Labrador there are more than a dozen outfitters offering barren ground caribou packages (DTCR 2005c). The price for an average one week caribou hunt is approximately CAD$3550.

The majority of hunting outfitters (88%) also have a quota for black bear of which almost half have a quota of 20 or less black bear per year. The average price of a one week bear hunt is about CAD$2200 and is available from one of over 80 outfitters (DTCR 2005c, 2006d).

Most outfitters do not offer trophy hunts for most species. This is a potential opportunity to offer a higher yield hunt that will diversify the province's outfitting product. However, the majority of operators have increased potential revenues by promoting packages that offer combination hunts to their clients. The average price of a one week moose and caribou hunt is about CAD$5400. The average price of a one week moose and black bear hunt is about CAD$4500 while a caribou, black bear hunt is the least expensive, averaging CAD$4450 (DTCR 2006d).

3.2 The Season

The big game season dates vary depending on the species and on the management area.
In general the dates on the Island of Newfoundland are:

Table 2. *Big Game Season on Island of Newfoundland*

Species	Season
Woodland Caribou	Mid-September to Mid-December
Moose	Mid-September to Mid-December
Black Bear	Early May to Mid-July Early September to Early November
Source: DTCR 2005c	

In Labrador the season for big game species extends from:

Table 3. *Big Game Season in Labrador*

Species	Season
Barren Ground Caribou	August 10 to April 30th
Moose	Mid-September to Mid-January or Mid-March depending on the zone
Black Bear	April 1 to July 13 August 10 to November 30th September 1 to November 30th (selected areas)
Source: DTCR 2005c	

The black bear is the only species with spring and fall hunts.

3.3 The Outfitters Season

The length of season varies with outfitters. For those outfitters offering exclusively hunting packages, the season is shorter, coinciding with the opening and closing dates for big game. The season for outfitters offering hunting packages is mainly September and October. June is also an important month, coinciding with the spring black bear hunt.

For outfitters offering both hunting and fishing opportunities, it is evident that they have been able to extend their season and also diversify their businesses. Survey results reveal that the majority of respondents are busiest from June to December coinciding with the hunting and fishing seasons. In addition, approximately 20% of respondents operate year round (DTCR 2006d).

3.4 Outfitting’s Economic Contribution to the Provincial Economy 2004

In 2004, economic growth in Newfoundland and Labrador, measured by real GDP grew by an estimated 1.7%. Growth was broad based with gains in consumption, government spending, investments and exports (Department of Finance 2006).

The real Gross Domestic Product (GDP) for various sectors of the economy is presented in Table 4. Even though the tourism sector contributed 1.8% (Accommodation and Services) to the provincial GDP in 2004, it remains one of the fastest growing sectors of the economy (HNL 2006).

In 2004, visitation to the province increased by 4.5% to 469 600 and non-resident expenditures rose by almost 5% to $336 million (Department of Finance 2006). Over the last thirteen years, the number of visitors to the province has increased by 65% and their spending, during the same period has increased by almost 150% (HNL 2006).

Table 4. *The Real Gross Domestic Product (GDP) for Industry Sectors Newfoundland and Labrador 2004*

Sector	**Value** (in millions)
Goods Producing	
Agriculture	42.7
Forestry and Logging	81.9
Fishing, Hunting, Trapping	276.0
Mining and Oil Extraction	2,403.5
Manufacturing	912.1
Fish Products	221.5
Other	690.6
Construction	799.3
Utilities	411.2
Service Producing	
Professional Scientific and Technical	461.5
Retail Trade	780.0
Transportation and Warehousing	468.6
Finance, Insurance, Real Estate and Business Support Services	1,937.3
Professional, Scientific and Technical Services	370.7
Educational Services	736.7
Health Care and Social Assistance	1,092.7
Information, Culture and Recreation	601.6

Accommodation and Services	**260.7**
Public Administration	1,107.9
Other Services	395.7
Total, All Industries	**13,534.3**
Source: Department of Finance 2006	

Survey results from outfitters (DTCR 2006d) reveal that approximately 34% of outfitters reported gross revenue from all outfitting operations of greater than $150 000 in 2005.

3.5 Economic Contribution of Outfitting

In determining the economic impact of the outfitting industry to the tourism sector, Table 5. presents a model based on outfitter revenue, transport fees, miscellaneous fees, and license fees. The 2006 outfitter survey results reveal that the mean gross revenue for the 77 survey respondents was $163 490,63. Multiplying the mean by the number of respondents (77) generates a contribution of $12 588 807. Extrapolating this to the overall industry (153 outfitters) generates an additional $19 670 011 for a total contribution of $32 258 818 from annual gross revenues.

In estimating the costs of transport fees, the assumption applied to the model is that the majority of clients fly to and within the province. As a result, airfares generate an additional $3 389938. Miscellaneous spending by clients at $500 per client per trip (additional accommodation, meals and beverages, gas, shipment of game, etc) generates an additional $2 921875. The cost of license fees for hunting and fishing total an additional $1 962006. Taxidermy revenues from hunters generate another $300 000 annually. Combining outfitting gross revenues, transport, miscellaneous expenses, and license fees generate direct revenues from the outfitting industry totaling $28 243829. In applying a conservative indirect multiplier of 1.3 to this subtotal, the impacts of outfitting to the economy total $36 716978. This figure is comparable to a number of resource based sectors of the provincial economy (agriculture, forestry and logging) and provides an important contribution to the rural communities and regions of the province. The economic impacts also represent a significant contribution of 12.5% to the overall tourism sector.

Table 5. *NLOA Economic Impact Model - NLOA economic impact estimate*

	Hunt					Fish					All		
Consideration	**#**	**ref**	**$**	**ref**	**Subtotal**	**#**	**ref**	**$**	**ref**	**Subtotal**	**#**	**$**	**Subtotal**
Outfitter revenues - from spring 2006 survey											77	163,491	12,588,807
Outfitter revenues - extrapolated to total # of businesses													19,670,011
Airfare to NL	4,000	a	250	b	1,000,000	1,475	c	1,000	b	368,750			368,750
Internal travel - Labrador	766	d	500	e	383,000	1,475	c	500	e	737,500			1,120,500
Internal travel - Islander	3,234	f	250	g	808,500	369	h	250	g	92,188			900,688
Extra spending	4,000		500	i	2,000,000	1,844		500	i	921,875			2,921,875
License fees - actual (see below)					1,777,631	1,475		100		147,500			1,925,131
License fees - estimated						369	j	100		36,875			36,875
Taxidermy	200		1,500	k	300,000								300,000
					6,269,131					2,304,688			28,243,829
									Indirect multiplier =			1.3	
License fee calculation - hunting									Total direct & indirect impact				36,716,978
species	**# sold**		**fee**		**Total**								
island moose	2,719		369		1,003,311								
island caribou	1,310		450		589,500								
island bear	929		100		92,900								
Labrador caribou	766		120		91,920								
	5,724				1,777,631								

Assumptions

a Approximate number of big game hunters visiting NL annually

b Airfare and travel costs to reach Newfoundland and Labrador will average $1000 per person; assumed 25% or $250 represents the in-province economic activity generated.

c Number of non resident 2005 angling licences (DTCR pers comm, 2006)

d Assumed all hunters traveling to Labrador are those hunting Labrador caribou

e Travel costs from Island to Labrador estimated to be $500 pp(average)

f The difference between total hunters and those hunting Labrador caribou; assumes insignificant number of hunters are hunting both Labrador caribou and island species

g Estimated airfare, ground transfer costs once non-residents reach NL - average per person

h Labrador fishermen estimated to make up 80% of fishermen in the province, 1475 = 80%, 369 = 20%

i Extra spending indicated on NZRI customer survey appear low; replaced with estimate of $500 to cover 2 nights hotel, meals, gas, drinks, game shipping

j Actual licence fees are from Labrador. Assume that 80% of fishermen visiting NL go to Labrador. Estimated numbers and fees for Island are 20% of Labrador licence totals.

k Assumed 5% of hunters will use local taxidermists; a very conservative estimate. Estimate from DTCR personnel 1999 BGHS results.

3.6 Annual Operating Expenses

An evaluation of annual operating statistics for outfitters revealed that wages and salaries accounted for approximately 28.9% ($47 283,53), non-wage operating expenses for approximately 51.8% ($84 660,24) and gross profit for approximately 19.2% ($31 546,86) of total gross revenues ($163 490,63) (DTCR 2006d).

A breakdown of operating statistics of adventure operators (Tourism Canada 1995) provides a comparative framework to assess the present relative efficiency of outfitters to this sector and is presented in Table 6. The results show that outfitters are spending approximately the same amount of their revenues on labour and that their gross profit is also comparable with adventure operators.

Table 6. *Operating Statistics of Adventure Travel Operators*

Expense Category	Percent of Sales
Labour	26.4%
Marketing	7.1%
Other	48.2%
Gross Profit	18.3%
Total	100.0 %
Source: Tourism Canada 1995	

Figure 11. provides a more detailed breakdown of non-wage operating expenses and shows that outfitters are spending a slightly higher percentage of their income on marketing than adventure operators. This may be a result of a shift away from traditional marketing techniques (travel trade, ads, consumer shows) by outfitters and the adoption of Internet-based marketing strategies.

In assessing the rest of the overall expenses of outfitters, the data reveals that vehicles and fuel account for approximately 25% of operating expense. Implementing conservation or "greening" measures to reduce these costs would provide an opportunity to economize on these expenses. Working with government to develop a reservation-type system that requires clients to purchase their licenses online might also be a solution for reducing non-wage expenses. In destinations such as Alaska and Nunavut licensing is not included in the overall price of packages.

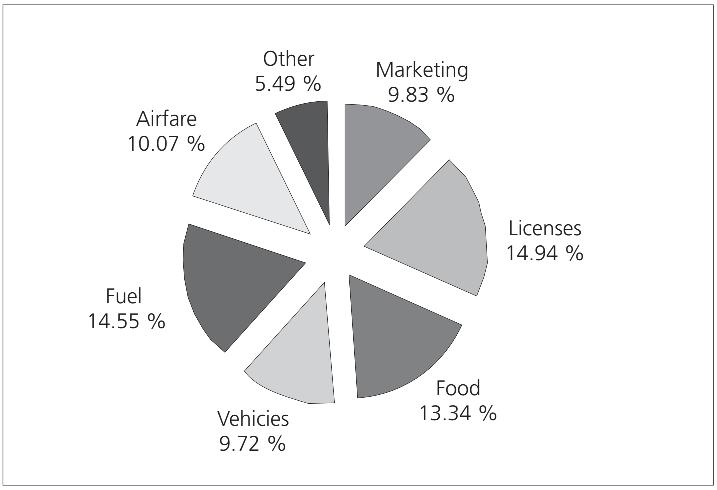

Figure 11. *Non-wage Operating Expenses of Outfitters by Category*

3.7 Human Resource Needs

3.7.1 Labour Market Trends

The tourism industry employs approximately 26 000 people in Newfoundland and Labrador (HNL 2006). According to the recently published Tourism Labour Market Study by Hospitality Newfoundland and Labrador (HNL), the provincial tourism industry association, tourism operators in Newfoundland and Labrador are finding it more and more difficult to find skilled workers as mature employees retire, the industry grows, and young people continue to leave the province. The current provincial labour shortage is a trend that is expected to continue, reflecting larger trends nationally and in rural jurisdictions as the Canadian population ages. By 2016, a shortage of 950 000 workers in the tourism sector is forecasted across Canada (HNL 2006).

As the labour market shrinks, the Canadian Tourism Commission reports that from 2002 to 2005, the employment growth in the tourism industry reached upwards of 90 000 new jobs and that over the next five years, employment demand will increase to 400 000 jobs. The Canadian Tourism Human Resource Council (CTHRC) is planning to work with public and private sector partners to develop strategies that address labour shortage issues that focus on adopting recruitment and retention strategies (HNL 2006).

Newfoundland and Labrador presently has the fastest growing provincial economy in Canada at 4.5% (RBC 2006). In addition to the growth of the tourism sector, other sectors of the provincial economy are also expanding, creating competition for both skilled and unskilled workers in the provincial labour market. Tourism's reputation as a low paying, seasonal, part-time employment makes competition for employees challenging (HNL 2006). There is a need for a strategy that promotes business retention and professionalism for the outfitting sector by industry associations.

Table 7 provides a forecast for projected labour shortages by 2015 for various occupations within the tourism industry. For occupations associated with the outfitting industry (guiding, hospitality services, business services) ten of the fourteen positions identified in the table will experience labour shortages, putting pressure on operators to remain competitive and financially viable. A 2004 HNL business retention strategy recommends innovative strategies between public and private sector stakeholders that promote partnerships, business mentoring, training, and support for the industry from local residents, to promote a positive working environment for employees. These strategies will assist in attracting new employees, increasing retention rates, minimizing turnover and improving business performance (HNL 2004).

Table 7. Projected Labour Shortages by Occupation, Tourism Industry, Newfoundland and Labrador 2015

Occupation	Projected Labour Demand 2015	Labour Shortage/ Surplus	Shortage as a % of Demand
Accommodation Service Managers	**489**	**2**	**0.4%**
Accounting and Related Clerks	**926**	**-416**	**-44.9%**
Airline Sales and Service	150	-59	-39.3%
Air Pilots Engineers Instructors NL	258	49	19.0%
Bakers	683	-178	-26.1%
Bartenders	**1,041**	**-307**	**-29.5%**
Cashiers	905	-221	-24.4%
Chefs	**4,250**	**-2,001**	**-47.1%**
Conference and Event Planners	541	275	50.8%
Cooks	**241**	**89**	**36.9%**
Food Service Supervisors	1,449	-1,076	-74.3%
Food and Beverage Servers	**877**	**299**	**34.1%**
Food Counter Attendants	1,449	-1,076	-74.3%
Hotel Front Desk Clerks	**4,024**	**-563**	**-14.0%**
Human Resource Managers	314	-54	-17.2%
Janitors Caretakers	413	56	13.6%
Landscaping, Grounds Maintenance	**2,496**	**-1,320**	**-52.9%**
Light duty Cleaners	191	118	61.8%
Maitre d'Hotel and Hosts	2,177	-1,005	-46.2%
Op and Attendant Recreational	71	-19	-26.8%
Other Attendants Accommodation	**385**	**-23**	**-6.0%**
Outdoor Sport and Recreational Guides	**66**	**-19**	**-28.8%**
Air Pilots Engineers Instructors	828	375	45.3%
Program Leaders in Recreation and Sport	258	49	19.0%
Pursers and Flight Attendants	708	-255	-36.0%
Restaurant and Food Service Managers	**2,335**	**336**	**14.4%**
Retail Trade Managers	5,635	-887	-15.7%
Retail Trade Supervisors	1,260	151	12.0%
Retail Salespersons Clerks	6,417	-3,232	-50.4%
Sales Marketing Managers	1,685	514	30.5%
Sales and Service Supervisors	2,161	111	5.1%
Taxi/Limousine Drivers	**371**	**-201**	**-54.2%**
Technical Occupations Museums	388	-111	-28.6%
Ticket Agents and Clerks	133	14	10.5%
Tour Travel Guides	**274**	**-55**	**-20.1%**
Transportation Managers	**275**	**-76**	**-27.6%**
Travel Counselors	396	132	33.2%
Total	47,031		
Source: HNL 2006			

3.7.2 Present Labour Market for Outfitting

In assessing the present labour market for the outfitting sector, survey results reveal that approximately 15% of all outfitters (hunt, both) have created at least one permanent, year-round position in addition to themselves at their outfitting operations.

Approximately 70% of outfitters have created between five and fourteen seasonal jobs. Hunting outfitters have created more seasonal positions but these positions are of shorter duration (1-9 weeks) versus the outfitters that offer both hunting and fishing packages.

In terms of wages, over half (54%) of all seasonal employees grossed between CAD$700 and CAD$899 per week in 2005 (DTCR 2006d).

In addressing labour shortage issues within the outfitting sector, approximately one third of hunting outfitters are encountering problems recruiting staff. The figure increases to 40% for outfitters that offer both hunting and fishing packages (DTCR 2006d).

For all sectors (Table 8), a shortage of applicants with guiding skills (57.1% hunting, 68.2% both) was mentioned by over 55% of outfitters. A shortage of applicants with good customer service skills and a shortage of people wanting to work in the industry were ranked second and third respectively. These results reinforce the results from the HNL tourism labour market study that indicate a shrinking labour market and a lack of trained applicants (DTCR 2006d).

Table 8. *What problems have you encountered in recruiting or finding staff over the past five years?*

SUBPOPULATION: Outfitters that have encountered problems in recruiting or finding staff for their outfitting operation in the past five years.						
	Hunting		**Fishing**		**Both**	
	N	**%**	**N**	**%**	**N**	**%**
Total	14	100.00%	25	100.00%	47	100.00%
Shortage of people wanting to work in industry	2	28.60%	4	44.40%	13	59.10%
Shortage of applicants with guiding skills	4	57.10%	6	66.70%	15	68.20%
Shortage of applicants with good customer service skills	4	57.10%	4	44.40%	7	31.80%
Cannot meet wage expectations	0	0.00%	1	11.10%	2	9.10%
Seasonality	1	14.30%	7	77.80%	4	18.20%
Difficult to retain staff	1	14.30%	2	22.20%	3	13.60%
Out-Migration	2	28.60%	0	0.00%	1	4.50%
Difficult to find qualified workers	0	0.00%	1	11.10%	2	9.10%
Source: DTCR 2006d						

3.7.3 Training Needs

When asked if outfitters had any specific training needs, approximately 33% of hunting outfitters and 39% of both hunting and fishing outfitters responded positively (Table 9). Outfitters that provide both hunting and fishing packages mentioned first aid and water craft safety of high importance while the hunting outfitters also mentioned first aid and rated client relations as a concern. This suggests a need for a series of training programs targeted at the outfitting sector, organized and promoted by NLOA, that are responsive to outfitter training needs. A series of partnerships need to be fostered and formalized by NLOA between the provincial tourism industry association, Hospitality Newfoundland and Labrador (HNL), local colleges (i.e., such as Corona College which offers a guiding and navigational training), St. John's Ambulance (First Aid), and the Coast Guard (water craft operation), hunter education and firearms safety (Inland Fish and Wildlife), and other organizations to address not only guiding requirements but also hospitality services to make training opportunities easy to access and efficient. Taking advantage of an increasing number of online training resources such as Emerit offered through HNL will also provide opportunities for training for the sector.

Table 9. *Are there any specific training needs within your outfitting operation?*

	Hunting		**Fishing**		**Both**	
	N	**%**	**N**	**%**	**N**	**%**
Total	21	100.00%	23	100.00%	54	100.00%
Yes	7	33.30%	15	65.20%	21	38.90%
No	13	61.90%	8	34.80%	31	57.40%
Don't know	1	4.80%	0	0.00%	2	3.70%
Source: DTCR 2006d						

3.8 Diversification

In the 2004 Newfoundland and Labrador Product Development Strategy, recommendations were made to safeguard natural and cultural heritage assets and provide international quality product and service opportunities to increase visitation and revenues for the tourism industry (HNL 2006).

Traditionally outfitting operations in the province have focused on offering and developing hunting and fishing packages for their clients. Over the last few years, in addition to hunting and fishing, an increasing number of operators have diversified, targeting niche markets interested in outdoor adventure, historic and cultural activities, learning and enrichment, and nature-based and ecotourism products.

Approximately 70% of outfitters offering both hunting and fishing, and approximately 60% of hunting operators are offering other types of outdoor activities to their guests. Some of the most popular activities include small game hunting, backpacking/hiking/walking tours, canoeing/kayaking, snowmobiling, and ATVing. The list of activities reveals that outfitters have diversified their product offerings and lengthened their operating seasons from traditional hunting and fishing seasons into the shoulder seasons including the winter months.

Approximately 30-40% of outfitters offering both hunting and fishing are having success with pre- and post- tours while only 20% of hunting outfitters have offered these packages. In addition to extending the stay of their clients, the changing nature of hunting/fishing clients is requiring that outfitters offer a number of activities at the same time as they are offering hunting and fishing for clients. For instance, at one lodge on the Northern Peninsula, a husband and wife visited for a week. While the husband fished, the wife was able to take advantage of cultural and craft activities in the area.

In evaluating the success of outfitting operations in partnering with other operators, only a small minority have explored this option (4.8% hunting, 11.1% both hunting and fishing) to increase their product offerings. Sub-contracting other tour operators and individuals to provide adventure, cultural, or nature-based experiences is an opportunity that could expand product offerings for outfitters while not requiring major capital investments (DTCR 2006d).

In the 2002 Ontario Resource-based Tourism Diversification Opportunities Study, three principal barriers to diversification were identified: the perceived difficulty on the part of outfitters to obtain financing; government regulations; and an absence of ideas and direction on the part of outfitters on what kinds of new activities and experiences to offer in order to attract new types of guests (Government of Ontario 2002).

When Newfoundland and Labrador outfitters were asked the same question, similar responses were generated. The top three responses from hunting outfitters were: government regulations, lack of sufficient capital, and increased costs. Outfitters offering both hunting and fishing packages mentioned an absence of ideas (unsure), government regulations, and seasonality.

Offering training programs and workshops on targeting niche markets, package development and pricing, and government regulations associated with the adventure tourism and nature-based sectors would assist outfitters in making informed decisions to overcome barriers to diversification and to respond to the declining hunt/fish markets.

3.9 Competing Land Uses

The land and fresh water area of the Newfoundland and Labrador is approximately 40 572 000 hectares with the land area totaling 37 387 200 hectares. Approximately 95% of the land in the province is Crown land with less than 5% of the province privately owned. Crown land is defined under the Lands Act as any land including land which is underwater that has not been lawfully alienated from the Crown for private or public use (DEC 2006b).

Through the provincial government, the use of Crown Lands are regulated for residents, institutions, and businesses to permit them to harvest or use a variety of natural resources, including forests, range, wildlife, and water that are found within these lands. Whenever too many individuals or interests compete to exploit these common property resources, "the tragedy of the commons" results where by all competing interests lose out as the resource is diminished (Ostrom 1990). The collapse of the ground fishery in the 1990s in eastern Canada provides an example of what will happen when resources are exploited without limit.

Due to historical settlement patterns that discouraged year round settlement, the lack of a compulsory land registration system, and numerous private land claims based on adverse possession, it is sometimes difficult to determine the extent of Crown land holdings in the province (Prospectors and Developers Association of Canada 2006).

For the majority of NL outfitters in the province, leasing Crown Land is a necessity to maintaining the viability of their business. 100% of the hunting outfitters depend on Crown Land leases and 67% of outfitters offering hunting and fishing packages lease their lands. For approximately 67% of hunting outfitters and 63% of outfitters offering both hunting and fishing the term of their lease is short term - one to five years. This makes business planning extremely uncertain. Even so, for outfitters with long-term leases, there are no guarantees of resource protection. Government is permitted to expropriate land and resources as economic priorities change. The challenge is deciding which competing interests should receive highest priority for the resources available on these lands.

The Department of Environment and Conservation is charged through the provincial Land Act and the Environmental Assessment Act to manage and allocate the Province's Crown Land resource in an environmentally responsible manner to meet the social and economic development needs of the public and private sectors while minimizing environmental impacts (DEC 2006b).

The Crown Lands Division makes land available for industry, settlement, recreational and conservation needs in an environmentally safe manner compatible with adjoining land uses. In doing so, the Division processes approximately 3000 land tenure applications annually; secures and guarantees Crown land title; and prevents the unauthorized use of Crown land (DEC 2006b).

For the majority of outfitters, recent changes in the region where outfitters operate are negatively affecting their businesses. Logging operations and development pressure are having some of the highest impact on outfitting operations. In addition, the Energy Plan for the province has also raised concern as the potential for hydro power and wind power are being explored for potential development.

Outfitters in the Gander and Buchans regions, with millions of dollars invested in their businesses, are concerned about recent wind farms being proposed by Horizon Legacy Energy Corporation and increased logging operations for these areas by the forestry companies. These activities are located adjacent to prime moose and caribou habitat, where present moose and caribou populations are already on the decline (NLOA 2006).

Action plans and strategies that integrate social, economic and environmental factors in decision-making are needed to sustain the rural communities of the province and protect the environment (Mitchell 1995). An integrated land use strategy for the province is needed to keep total resource demands on Crown Lands in line with sustainable use. The province's proposed Round Table for Sustainable Development and Sustainable Development Act will be key to promoting more wise and cooperative stewardship of the province's natural resources to achieve environmental and economic sustainability over the long-term not only for the province but also for the outfitting industry (DEC 2006b).

4. Regulations

The regulatory framework for the Newfoundland and Labrador outfitting industry spans both provincial and federal jurisdictions. Regulations and responsibilities for outfitting are the responsibility of three provincial government departments and one federal government department (Table 10).

Table 10. *Regulation and Policy Responsibilities*

Act / Regulation	Agency
Tourist Establishment Act *Tourist Establishment Regulations*	Department of Tourism Culture & Recreation **(Provincial)**
Wild Life Act *Guides Regulations* *Wild Life Regulations*	Department of Natural Resources **(Provincial)**
Canadian Firearms Act & Regulations	Department of Justice **(Federal)**

Resource Allocation / Licensing	
Non-Resident Big Game Hunting Allocation / Licenses (Moose, Black Bear, Caribou)	Department of Environment and Conservation / Inland Fish and Wildlife **(Provincial)** Department of Tourism Culture & Recreation **(Provincial)** Newfoundland/Labrador Outfitters Association **(Provincial)**
Source: Gov. of Newfoundland and Labrador, Department of Justice 2006	

Issues addressing non-resident big game regulations and guide/outfitter requirements in Newfoundland and Labrador are summarized in Table 11.

Table 11. *A Summary of Big Game Regulations in Newfoundland and Labrador*

Non-resident hunting licenses	Response
Who issues/distributes non-resident licenses?	• Fish and Wildlife • Department of Tourism, Cultural & Recreation • Newfoundland and Labrador Outfitters Association
Are licenses refundable?	Yes, with conditions.
Percentage of licenses allocated to non-residents?	10.5% moose 25 % caribou Bear allocation under review
How do they handle surplus licenses?	Through a draw administered by Newfoundland and Labrador Outfitters Association (NLOA)
Can licenses be sold with the business?	Yes the allocation is considered part of the business.
Are new outfitting licenses being granted?	No

Guide / Outfitter Requirements	
Are non-resident hunters required to have a guide while hunting?	Yes
What does it require to obtain a guide license?	• Hunter Education Course • Canadian Firearms Course • Emergency first aid course • Safe boating course. Or completion of a recognized guiding course
What is the required guide to client ratio?	2 maximum
Are outfitters required to carry liability insurance?	No
Is there a requirement for workman's compensation for guides?	Provincial employment regulations dictate rules for workman's compensation.
Is there a lodge/camp grading or certification process?	Yes

In Newfoundland and Labrador the total allocation for big game is determined by the Inland Fish and Wildlife Division. The allocation is then forwarded to staff at DTCR, who are mandated with determining the number of non-resident licenses available for each management zone. The allocation is then assigned to individual operators, with the resulting breakdown forwarded back to Inland Fish and Wildlife for distribution and payment. Outfitters are required to purchase licenses up front (DTCR - Paula Devereaux pers.comm. July 2006).

The Newfoundland Labrador *Tourist Establishments Act* and corresponding *Tourist Establishment Regulations* represent the provincial regulatory applications governing the licensing of provincial outfitter's.

In the *Act* a "tourist establishment" is defined to include a cabin, cottage, hotel, motel, motor hotel, inn, tourist home, tourist information centre, hospitality home, tour company, and trailer establishment and a camp, cabin, tent camp or other premises erected or used for the purpose of catering to hunters and sport fishers and a boat on which food and overnight accommodation is provided for hunters, sport fishers and travel parties (DTCR 2006e). Enforcement of the *Act* comes under the jurisdiction of the Department of Tourism Culture and Recreation.

In the *Regulations* the rating system for tourist establishments is part of the national Canada Select Program. Responsibility for its administration is clearly articulated:

"Canada Select Program" means a system of classification, together with the rating of tourist establishments of the type specified in these regulations, through an inspections program independently administered by and under the direction of the Newfoundland and Labrador Accommodations Rating Council based on the extent and quality of facilities, services and guest amenities provided at those tourist establishments" (DTCR 2006e).

The Regulations also give clear definitions as to what constitutes a tourist establishment as outlined in Table 12.

Table 12. *Establishment Definitions - Tourist Establishment Regulations - NFLD*

Structure	Definition
Fishing Camp	A cabin or tent camp of one or more units used for the purpose of catering to sport fishers.
Hunting Camp	A cabin or tent camp of one or more units used for the purpose of catering to hunters.
Tent	Includes every kind of temporary shelter for sleeping.
Tent camp	Means a camp located in the interior of the province and used for the purpose of catering to hunters, sport fishers or travel parties or a combination.
Trailer Establishment	Means a commercial establishment comprising land used or maintained as sites for tents, tent trailers, travel trailers, pick-up campers or other recreational vehicles providing sleeping accommodation whether or not there is a charge made for the use of the ground so used in camping or parking, residential trailer parks are not included.
Trailer Lot	Means the portion of a trailer establishment that is to be occupied by a tent or trailer.
Source DTCR - Tourist Establishment Regulations 2006e	

The *Regulations* outline specific details necessary to accommodates hunters. Every cabin camp or tent camp must have a screened shelter with watertight roof, completely fly proofed and of adequate size to take care of the hanging and cooling of the meat of animals.

The operator of every cabin camp or tent camp used for the purpose of catering to hunters and sport fishers shall provide a sufficient supply of clean, new materials suitable for the sanitary wrapping of all meat or fish to be transported from the cabin camp or tent camp (DTCR 2006e).

There is within the *Tourist Establishment Regulations,* a clear requirement for licensing. A tourist establishment shall not be licensed unless the establishment has attained and continues to hold the minimum one star rating according to the criteria of the Canada Select Program. Equally concise is the regulation that can be applied to those who operate on the fringe and do not have a license. A person, other than the holder of a license issued and valid under these regulations, shall not operate a tourist establishment in the province (DTCR 2006e).

Newfoundland and Labrador outfitters are obligated under the regulations to maintain a permanently bound register or consecutively numbered card register of every person accommodated in the establishment including their name and permanent address. There is also a mandate to show the arrival and departure date of each guest.

Operators also have an obligation to have in attendance at all times during the operation of the establishment at least one competent adult. The operator must number or name each rental unit and keep posted in each rental unit a notice specifying the rates charged for the rental unit.

At the request of an inspector or police officer, the operator must produce for inspection any register, license, notice or insignia required under the Act or these regulations. The license must be displayed in the part of the establishment where the register is kept and provide first aid equipment and maintain it ready for immediate use (DTCR 2006e).

In those instances where an outfitter provides boats, canoes or other water craft they must maintain the equipment in good repair an in a clean and safe condition. They are also obligated to maintain in good repair all wharves, docks, landing places and boat houses on or used in conjunction with the establishment and to mark and keep marked on each boat, canoe or other water craft in a conspicuous place the safe carrying capacity of the boat, canoe or other water craft. The operator must also provide life preservers for each guest to equal the passenger capacity of each water craft, and comply with the *Small Vessel Regulations* under the *Canada Shipping Act* (DNR 2006b).

Government regulation and policy play an obvious role in the outfitting industry across Canada. The efficiency and effectiveness of these regulations demand a periodic review to keep pace with the ever-changing industry landscape. There is no doubt that regulation and policy are required, but in the same breath they can become burdensome, and in some cases restrictive to the overall growth of the industry. The greatest challenge in Newfoundland and Labrador to implementing regulatory and policy change for the betterment of the outfitting sector is mustering the "political will" to execute in a timely fashion.

5. Marketing

5.1 Current Markets

Hunting is a sport that is deeply rooted in North American traditions. Guided hunting in Canada is dominated by foreign hunters, many from the United States (Table 13.). Non-resident hunters form the backbone of the outfitting industry in Newfoundland as non-residents may not hunt big game in Newfoundland and Labrador without hiring an outfitter guide. This reliance is consistent with other Canadian provinces.

Newfoundland's DTCR recognizes the preponderance of Americans in the guided hunting markets. As shown in the following table a vast majority (80%) of the province's big game hunters comes from the United States and 40.8% of U.S. hunters come from three states, Michigan, Pennsylvania and New York. Other key markets are Ohio, Massachusetts, New Jersey, Connecticut, Wisconsin, Maryland and Texas. The primary Canadian markets are Nova Scotia, Ontario and Quebec.

Those consumers targeted by DTCR are male, 25 – 65 years of age with an emphasis on those over 45. They have a mid to high household income, post secondary education and live in rural areas (DTCR 2006d).

Table 13. Origins Non-Resident Big Game Hunters to Newfoundland

Origin of Non-Resident Hunters	1988	1991	1999	2005*
CANADA	**319 (33.7%)**	**695 (48.5%)**	**583 (17.6%)**	**509 (15.7%)**
Nova Scotia	250 (26.4%)	445 (31.1%)	256 (7.7%)	188 (5.8%)
Ontario	23 (2.4%)	46 (3.2%)	84 (2.5%)	130 (4.0%)
Quebec	39 (4.1%)	123 (8.6%)	156 (4.7%)	113 (3.5%)
New Brunswick	7 (.7%)	56 (3.9%)	73 (2.2%)	71 (2.2%)
Other Canada		25 (1.7%)	14 (0.4%)	7 (0.2%)
UNITED STATES	**618 (65.3%)**	**717 (50.0%)**	**2669 (80.3%)**	**2690 (82.8%)**
New England	198 (20.9%)	175 (12.2%)	311 (9.4%)	299 (9.2%)
Mid-Atlantic	289 (30.5%)	357 (24.9%)	882 (26.5%)	1079 (33.2%)
East North Central	50 (5.3%)	70 (4.9%)	847 (25.5%)	675 (20.8)%
South Atlantic	50 (5.3%)	55 (3.8%)	275 (8.3%)	296 (9.1%)
Other USA	31 (3.3%)	60 (4.2%)	354 (10.7%)	341 (10.5%)
Other Countries	**10 (1.0%)**	**21 (1.5%)**	**71 (2.1%)**	**50 (1.5%)**
Total	**947 (100%)**	**1433 (100%)**	**3323 (100%)**	**3249 (100%)**

* 1988, 1991 and include 1999 include all non-resident hunters. 2005 are estimates based upon 87.6% of returns.

Source: DTCR 2006c

5.2 Demographic and Psychographic Big Game Statistics

Most Newfoundland and Labrador outfitters operate a small to medium size business with the annual number of guests ranging from 25-49 for the majority of outfitters.

Approximately 77% of hunters are staying in the province about a week. Whether this is driven by customer preference or by the nature of the packages offered is unclear. The vast majority of customers for hunting outfitters are males (>90%); females make up a very small percentage (< 10%).

Approximately 86% of the hunters to Newfoundland are considered middle aged, falling in the 45 – 59 years age category. Few hunters are seen in the younger age categories potentially an area of concern as it is possible the market is not replacing itself as hunters' age and leave the sport.

Approximately 74% of the people coming to hunt with outfitters in Newfoundland and Labrador have hunted in the province before. Approximately 55% of outfitters report a high percentage of repeat visitations. This is a strong indicator that outfitters are delivering a product that meets or exceeds their customers' expectations.

Outfitters believe that the availability of game (57%) is the most important factor in convincing hunters to visit Newfoundland and Labrador. Price (19%) and the quality of guiding (14%) are seen as other critical factors. The unique culture of the province (5%) and the clean and unspoiled environment (5%) while important, seem to be secondary to price or quality in the decision to purchase a hunt from a Newfoundland and Labrador outfitter.

Outfitters believe that time in a wilderness environment best describes the experience that their customers are seeking. This element is seen as significantly more important than the chance to experience something new, renew friendships or participate in outdoor recreation. The heavy emphasis on time in a wilderness environment may prove to be problematic given the increasing pressure on natural areas from competing user groups.

In the last three years, most outfitters have seen their level of sales remain stable or decrease. Only 28.6% have seen the sales of hunt packages increase. Many of them attribute this change to a number of factors including the state of the U.S. economy, travel costs, exchange rates and the difficulty in shipping game. These factors have negatively impacted outfitters across Canada and represent real challenges to individual businesses.

For those outfitters who have been able to increase the level of their visitation, they have attributed much of their success to advertising and the quality of product offerings (DTCR 2006d).

5.3 Big Game Outfitter Marketing Methods

Outfitters are using a variety of marketing methods. Almost all businesses report using a website. Brochures are the second most popular method of advertising. Placing advertisements in magazines is a common form of advertising, however the use of travel writers, in some ways a more effective way of utilizing print media, is not very highly utilized. The use of intermediaries such as booking agents does not seem to be very prevalent perhaps because a large number of customers are repeat visitors.

Table 14. *Which of the following marketing efforts were undertaken by your outfitting operation in 2005?*

	Hunting	
	N	**%**
Total	69	100.0%
Website	19	90.5%
Brochures	16	76.2%
Magazines	13	61.9%
Tourist guides	6	28.6%
Booking Agents	6	28.6%
Consumer shows	4	19.0%
Travel writer	2	9.5%
Newspaper	1	4.8%
Familiarization tours for TV production / journalists	1	4.8%
Word of mouth	1	4.8%
Radio	0	.0%
Video/DVD	0	.0%
Business cards	0	.0%
No answer	0	.0%
Don’t Know/Unsure	0	0%
Source: DTCR 2006d		

Most outfitters are willing to consider new marketing activities in an effort to increase sales. The geographic regions where they would be willing to invest mirror those regions in which much of their current customers originate i.e. Mid Atlantic states, Ontario, Quebec, and Atlantic Provinces. Some outfitters see the need to expand into new markets as evidenced by the high rates of interest in states outside of the New England and Mid-Atlantic region, and for western Canada, Europe and Asia.

When asked how their businesses would change in the next five years, the most common response was to market to corporate groups, followed by spending more on Internet marketing. In the same section, people were asked about what items represented barriers to their growth. Many people said they did not know how to reach new markets. Some must also deal with a lack of Internet services, a significant disadvantage in today's business environment.

5.4 The Role of the Department of Tourism, Culture and Recreation (DTCR)

The Newfoundland provincial government via the Department of Tourism, Culture and Recreation takes considerable interest in the marketing both hunting and fishing activities together as part of one sector. The planned budget for 2006/2007 advertising and promotion activities targeted directly at hunters and fishermen is $344 000. This expenditure is further supported by staff in the DTCR call center, distribution center and its outside ad agency. The breakdown of the annual marketing budget is shown in Table 15.

Table 15. *Hunting and Fishing Sector Estimated 2006/2007 Marketing Investment*

Advertising campaign including direct mail	$180,000
Consumer shows	15,000
Show Travel	20,000
Travel writer Fam Tour support	30,000
License purchase for Fams	5,000
H&F Guide	88,000
HF Product Team Meetings	6,000
	$344,000
Source: DTCR 2006b	

As mentioned in earlier sections, DTCR targets the key markets of Michigan, Pennsylvania and New York as well as Canadians from Quebec, Nova Scotia and Ontario. For marketing purposes, the hunting markets are further delineated by high (remote lodge clients), medium and low yields (drive through visitors). DTCR invests its marketing budget in regions that have consistently generated good conversion results. From time to time it tests other U.S. regions for potential new markets.

Media activities undertaken by DTCR include magazine advertisements in a mixture of hunting and fishing magazines that target key geographic areas. Direct mail activities include Direct Action Cards; these are packs of two cards, one with a hunting message, and one with a fishing message. Sports Select distributes 500 000 packs, Premier Sportsman distributes 200 000 packs. Online and email activities have been diversified to include cross promotion of hunting and fishing magazine websites, sponsorship of hunting and fishing e-newsletters and advertising on members-only hunting websites. The Department is in the process of creating an online address database for email marketing purposes.

The Newfoundland and Labrador website at www.newfoundlandandlabrador.com is the primary website used by DTCR in their online marketing to travelers. Fishing and hunting are shown prominently under the activities available to the visitor. From the hunting and fishing web pages there are links to the individual operators but no links to the NLOA website. The user can select from pages providing information on lodging, food, etc. The web page listing accommodation is organized by hotels, motels, bed and breakfasts, cabins, etc., but there is no separate category for hunting or fishing lodges. The DTCR is presently in the process of upgrading its website.

A key marketing tool for the province is the hunting and fishing guide which is produced every two years. Approximately 40 000 copies of this publication are distributed to prospective hunters and fishermen. The publication includes short articles by recognized media people stressing the benefits of a hunting or fishing trip to Newfoundland and Labrador. The USPs for the province are further stressed in highly visible sidebars. The USPs include:

- the size and abundance of fish and game,
- success rates,
- the uncrowded wilderness
- reasonable prices of guided trips to Newfoundland and Labrador
- adept guides
- unique hunting and fishing opportunities (e.g. woodland caribou, wild arctic char)
- trophy hunts
- diverse outdoor adventure opportunities

These USPs position Newfoundland and Labrador favorably against other Canadian destinations. If outfitters decide to target more high-yield sportsmen and increase trip prices, the emphasis on reasonable prices may need to be reconsidered.

DTCR offers outfitters several opportunities each year to participate in marketing opportunities. A comprehensive listing is distributed each year on the possible marketing activities such as trade show participation, advertising purchases, media trips, etc. Industry is encouraged to participate in those programs that match individual outfitters marketing objectives.

Where possible, the DTCR gathers detailed statistics on the source of hunting and fishing customer markets and the success of its marketing activities. The Department calculates a Cost per Inquiry (CPI) for its magazine advertisements, eliminating those publications that perform below the average CPI. CPI's are also calculated for direct marketing and Internet. In 2005, direct marketing was found to have the lowest CPI of the three media with action deck cards being the most efficient form of direct marketing (DTCR 2005b)

DTCR has found that their target audience is medium to heavy readers of magazines and heavy users of the Internet. They do not object to receiving email newsletters and are sometimes or often receptive to envelopes and brochures. In 2005 the media strategy recommended a media mix that includes magazines, direct marketing and online marketing with recommended spending of magazines (70-80%), direct marketing (15-20%) and online marketing (5-10%) (DTCR 2005b). It was also recommended that an email database be created, possibly using a contest to gather names. Other methods of online marketing are being investigated. For 2007 DTCR will be further evaluating magazines and business reply cards, cable television programs, and Internet search engines.

A key measure of success for DTCR is the number of customer queries received. These requests for information are tracked according to its source wherever possible. In 2005, the number of queries was up 10.3% over 2004 (Table 16.). This does not bring the number back to 2002 levels but it was an improvement over previous years where queries were down. Representatives from the DTCR have commented on concerns raised by outfitters on the number of queries; while the number of queries has decreased from its level in 2002 they feel a bigger issue is the follow through on the queries. Where queries are passed along to the outfitters there is some concern that they are not replied to promptly especially in the case of inquiries arriving via the Internet.

Table 16. *Unique Inquirers Statistics*

	2002	2003	2004	2005
Number	94,722	79,350	78,229	86,275
Percent change	n/a	-16.2%	-1.3%	10.3%
Source: DTCR 2005b				

6. Conclusions

In 2006, the big game resources that are the mainstay of the industry in Newfoundland and Labrador are on a downward cycle. Moose and woodland caribou populations are declining while black bear, barren ground caribou are stable. Quotas and license allocations are diminishing as the industry experiences a downsizing after a long period of expansion at the end of the 20^{th} century.

At present, the outfitting industry supports 153 operators. The majority of operators have one or two lodges and a range of amenities. Hunting and fishing are now being supplemented with a diversified range of activities and packages to respond to the changing marketplace. Economically the industry contributes $37 million to the provincial economy and captures 12.5% of the tourism sector, one of the fastest growing sectors in the province. The average annual gross revenue for outfitters is CAD$163,000.

As the provincial labour market shrinks, a coordinated program of training opportunities and work experiences are necessary to promote business retention and professionalism within the industry. Competing land uses pose one of the greatest challenges to the sustainability of the sector as mining, forestry, development and alternative energy interests are targeting prime lands that presently support big game populations.

In addition, there is a need to change regulations to better support the outfitting industry. Partnerships between industry and government as well as between industry associations across the country are required to bring about positive results. In terms of big game, allocation of resources and assignment to outfitters, as well as the current refund policy need to be re-evaluated to improve the public image of the industry and to streamline the management process to satisfy the needs of industry and government.

There is also a need for a review of outfitting regulations to keep pace with the ever-changing industry landscape and to promote the adoption of regulations that are enforceable and not burdensome or too restrictive. The political will to execute and implement regulatory requirements is one of the greatest challenges facing the industry.

In terms of marketing, the outfitting industry has been successful in attracting hunters to the province by promoting the abundant natural resources, availability of game, competitive pricing and skilled guides. In addition, the provincial tourism department has been efficient and strategic in adopting marketing activities with the greatest return. Their efforts have been complemented by the positive relationships between outfitters and their guests who have built a successful repeat business. Visitor satisfaction is high. As traditional hunting markets have matured there is a need to develop quality complementary activities. Better travel connections are needed as well as new competitive hunting products that focus on the province's unique wildlife or that target new markets. Increasing competition will require outfitters to maintain quality customer service. Future marketing success will depend on adopting Internet marketing techniques. NLOA needs to work in partnership with government agencies to maximize marketing impact on behalf of its members.

The foundation and success of the outfitting industry over the next ten years will be based on adopting environmental measures that support the conservation and proper management of wildlife resources and the ecosystems that support them. Responsible environmental practices and actions are necessary to support a wise use of resources to build the industry. Policy and regulatory changes that will improve the efficiency of the industry and assist outfitters in taking advantage of the province's unique selling points to offer a higher yielding, high-quality product are needed. By adopting these strategies, the outfitting industry will remain competitive in the marketplace and continue to be recognized as a world class outfitting destination.

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