

Spotlight | 2018

Shoot Benchmarking Survey 2017/18 season



Summary Profitability has been similar for two seasons as shoots successfully budget to accommodate rising wage costs and reduced income from shot game

■ **Variable costs mirror four years ago but overall profitability is better.** Cost control and higher charges mean finances have improved. Only 42% of shoots with income from let days made a loss in 2017/18.

■ **Shoots continue to show commitment to environmental stewardship.** Despite national figures that show an overall reduction in stewardship participation.

■ **84% of shoots with grey partridges report that numbers are stable or increasing.** 52% of shoots with grey partridges manage habitat specifically for their benefit.

■ **Beaters' pay has increased by 32% since the 2010/11 season.** Wage inflation has been more rapid over the last three seasons due to the impact of the National Living Wage.

■ **Over 80% of shoots plan to increase their charges for next season, considerably more than a year ago.** Unlike a year ago none of the shoots intend to reduce their prices.

Economics and conservation

The latest Survey covering the 2017/18 season gives an unrivalled look at shoots' economic and environmental statistics

The Savills Shoot Benchmarking survey produced in conjunction with the Game & Wildlife Conservation Trust uniquely focuses on the economic and environmental performance of driven game shoots. We recognise that the objectives, structures and sizes of shoots are diverse, and have designed our benchmarking to make sure it is relevant to all types of shoot.

The 2017/18 season survey results include data from 130 shoots based throughout the UK. Collectively these shoots shot more than 2,900 days, put down more than 1.6 million birds and employed 200-plus full or part-time staff, generating a turnover in excess of £15 million.

Headline results

- £12.41 cost per bird put down
- The average return was 38%, meaning 38% of the birds released were subsequently shot
- £34.61 was the average cost per bird shot
- £35.81 was the average price charged per partridge shot
- £38.67 was the average pickers-up pay per day
- 84% of shoots plan to increase their charges for the 2018/19 season
- The average salary for a single-handed keeper was £21,100 plus benefits
- 60% of shoots sell some days on a fixed price per day
- 71% of shoots use land which is part of a paid agri-environment scheme
- 48% self-fund environmental work
- 7% of shoots use social media

Committed to conservation

Environmental support

With current agri-environment schemes taking a more targeted approach and administrative issues affecting their delivery, the overall area of land they cover has declined. Despite this national trend the proportion of shoots using land covered by a stewardship agreement remains stable at 71% and commitment remains high; 85% say they or their landlord will seek to join a successor scheme when their current agreement expires.

Current conservation work includes:

75% of shoots have established buffer strips and/or field corners

81% have established wild bird seed mix

41% have established pollen and nectar mix

92% feed their birds after the season

47% provide supplementary feed specifically for songbirds

67% have planted woodland in the last 10 years, averaging 46 acres each

Grey partridge conservation

Our survey results also highlight how shoots are helping to conserve the wild grey partridge, which has suffered significant declines over the past few decades. Grey partridges are present on 39% of participating shoots, with 52% of these shoots undertaking specific management for their benefit. Some 84% of those shoots with grey partridge report that numbers are stable or increasing. Essential components of conserving wild partridge stocks are habitat management and legal predation control, 78% of shoots have active predation control all year.

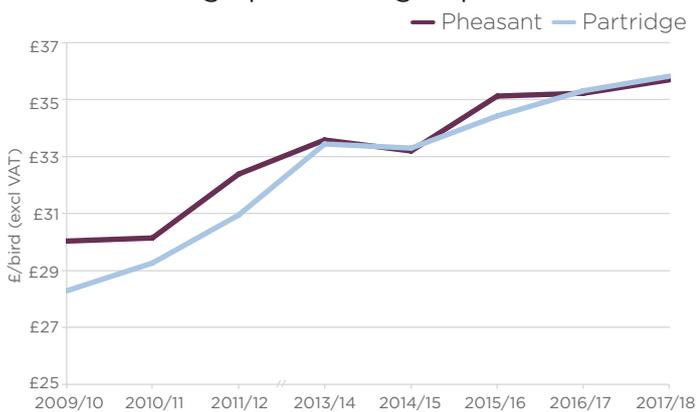
Shoot performance

Profitability varies widely, and analysis of all costs is essential for setting shoot charges for future seasons

Income

For the 2017/18 season shoots increased their charges per bird by an average of 49p, which is 1.4%. On 58% of participating shoots the average income per bird shot on let days was lower than the price quoted per bird due to the leeway offered before overages. It is therefore important to fully scrutinise income, expenditure and performance before fixing future charges.

FIGURE 1 Average price charged per bird



Source: Savills Research

Staff salaries

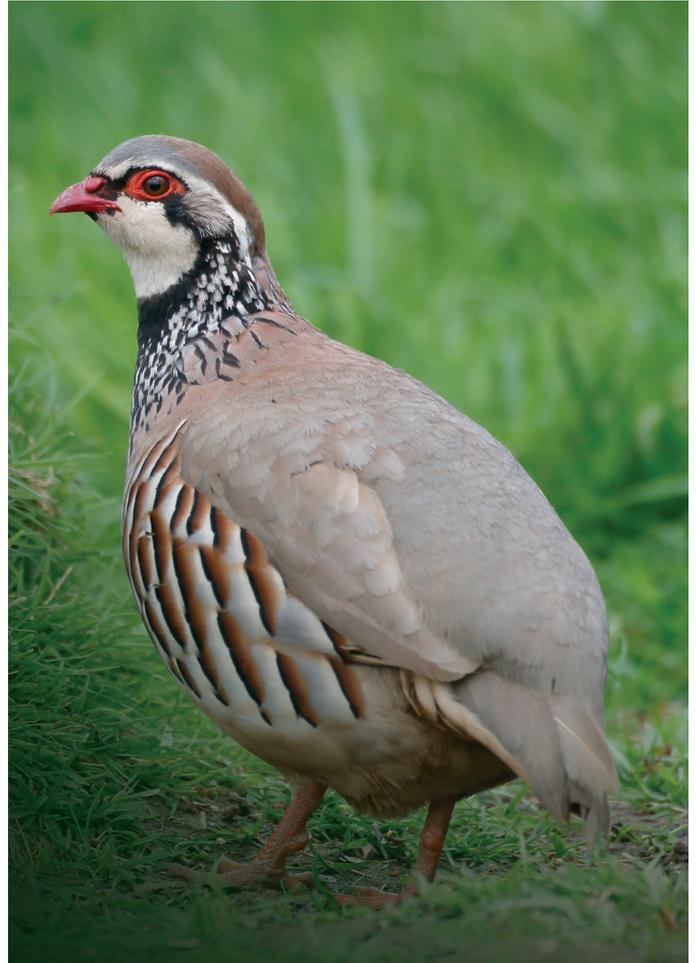
Salary reviews on shoots have reflected trends in the wider economy. Only 10% of shoots did not increase salaries this year and the average salary increase was 2.5%.

We benchmark salaries and benefits for head keepers, beat keepers and single-handed keepers. During the 2017/18 season, the average salary for a single-handed keeper was £21,100, plus benefits. For 90% of single-handed keepers, a house was included as part of their remuneration package.

Beaters' and pickers-up' pay

The Survey shows that at £2.63 per bird shot, pay for beaters and pickers-up is one of the largest costs for shoots. Most shoots pay beaters £25-35 per day and pickers-up £30-50 per day. Traditionally beaters and pickers-up have been provided with lunch as well as being paid.

Average pay rates have increased by 32% for beaters and 33% for pickers-up since 2010/11. Inflation in this cost has been more rapid over the last three seasons due to the impact of the National Living Wage. The overall cost of beaters and pickers-up per bird has not increased by the same proportion suggesting shoots have compensated by using less staff on the day, or shoot days are larger and/or fewer in number.



Profitability

Variable costs for the 2017/18 season were at their highest since 2013/14, when they also averaged £8.60 per bird put down. Back in 2013/14 just over half of shoots made a loss, however last season they fared better and the proportion was down to 42%. This improvement reflects the fact shoots have increased their income while reducing their fixed costs per bird.

On average shoots made a profit of 8p per bird shot in 2017/18; but this average conceals a significant range of performance. Shoots making a profit averaged £4.74 per bird shot, whilst those making a loss averaged £6.51 per bird shot. The overall average performance being close to breakeven is similar to the 2016/17 season when the average shoot lost 36p per bird shot.

For the 2017/18 season shoots increased their charges by 49p per bird

Game meat challenge

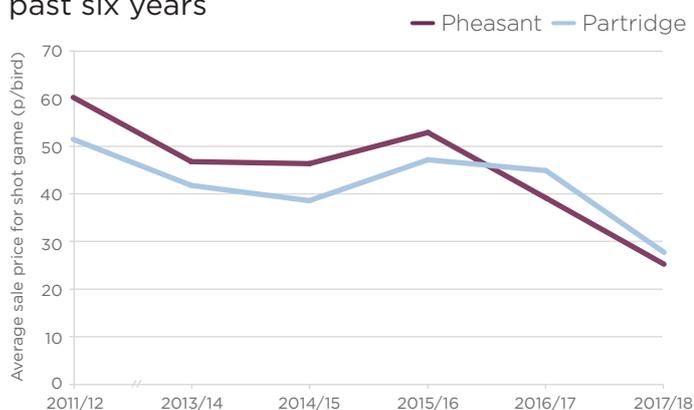
Supply outstrips demand

During the 2017/18 season many shoots began to find marketing shot game increasingly challenging. The increased popularity of game shooting has led to more birds being released, creating an imbalance between game meat supply and demand.

Savills Game Meat survey of 566 shoots in conjunction with the Countryside Alliance found that game dealers take, on average, 48% of a shoots' shot game. Our Shoot Benchmarking data shows prices received have fallen by 50-60% over the last six years (Figure 2), and fell 35-38% between the 2016/17 and 2017/18 seasons.

The market situation also meant not all shoots were able to sell their shot game, last season 46% were supplying their game dealer free of charge and 12% were paying the game dealer to collect them. There was some variation but typically payments were 20-30p per bird.

FIGURE 2 Shot game prices have fallen over the past six years



Source: Savills Research

What is the solution?

Shoots recognise this problem must be tackled and know they must become more pro-active in the sale and marketing of their shot game. Nearly all agreed collective action and cooperation is required, with many shoots suggesting a central body should be formed to promote game consumption to consumers and co-ordinate sales into supermarkets.

Since the survey was undertaken, the British Game Alliance has been launched (May 2018; www.britishgamealliance.co.uk) and will focus on these areas. Recent polling for the Countryside Alliance found 85% of consumers had never bought pheasant or partridge to cook at home, and a high proportion of them are not averse to trying game. These factors suggest that cooperation and targeted action offer potential to develop a more sustainable game meat supply chain and alleviate the issues experienced last season. ■

Outlook

Most shoots were optimistic about their prospects for the 2018/19 season; of those which let days, 66% said they were selling easily.

71% of shoots were planning to release the same number of birds for next season, this is the same proportion as last year, suggesting that numbers released are stabilising.

84% of shoots were planning to increase their charges for the 2018/19 season, this is a higher proportion than in past seasons (generally 50-60%) although the amount by which they intended to raise prices was the same as last year; typically by £1-2 per bird, with the average being £1.80 per bird.

Shoots are generally positive about their prospects for next season, but overall optimism about the future of driven game shooting is lower. We believe this can be attributed to a number of wider concerns including:

- **Risk of disease** An avian influenza outbreak could impact game farms, game rearing or the movement of guns during the season
- **Public opposition** Shoots could attract more attention from anti-shooting activists, shoots need to be confident that their enterprise can withstand external scrutiny
- **Game meat sales** Shoots need a sustainable market for their game meat, the formation of the British Game Alliance is a positive step but it will take time for it to develop markets and it is important that shoots follow best practice
- **Rating of sporting rights** Currently applicable in Scotland, for some shoots this will be an added cost to factor into budgets
- **Brexit** This could have an impact if the supply of eggs, chicks or poults is restricted from the continent, from where a high proportion are currently imported; or if game meat exports are affected.

These concerns are significant, but can be managed or overcome, particularly if shooting bodies and interested parties work together. Now, more than ever, it is time to highlight the conservation and economic benefits that shooting can bring to all corners of the UK.

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All survey participants receive a detailed personal report with tailored information, which allows them to anonymously compare their operations with similar shoots. If you would like to register interest in the next survey please contact us.

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