

UK Rural - Summer 2019

Q
SPOTLIGHT
Savills Research

Game and Conservation Benchmarking



In association with



Habitat creation and management • Shoot assurance schemes • Costs and planned charges

“The results for the latest season demonstrate the significant amount of environmental management work already undertaken by shoots and their ongoing commitment to it”

Habitat creation and management

Support for environmental stewardship remains high as the UK takes an increasingly environmentally focused approach to land use

The Savills Game and Conservation Benchmarking survey produced in conjunction with the Game & Wildlife Conservation Trust uniquely focuses on the economic and environmental performance of driven game shoots. The 2018/19 season results are based upon data from 88 UK shoots. Collectively they shot more than 1,800 days, put down more than one million birds and employed 150 full or part-time staff, generating a turnover of over £8.5 million. Recognising that the objectives, structures and sizes of shoots are diverse, we have designed our benchmarking survey and report to make sure it is relevant to all types of shoot.

More focus on wider environment

As the UK looks to take an increasingly environmentally focused approach to land use and management, the results for the latest season demonstrate the significant amount of environmental management work already undertaken by shoots and their ongoing commitment to it. Of the participating shoots 74% are using land covered

by a stewardship agreement and 81% say they or their landlord will seek to join a successor scheme when their current agreement expires.

Most of the environmental indicators that we monitor show results consistent with previous seasons; for example 81% of shoots have established buffer strips and/or field corners compared to an average of 77% across the three previous seasons. However, more shoots have established pollen and nectar mixes, with half of them now including a pollen and nectar mix in their habitats, an increase of 9% compared to the average for the last three seasons.

On the other hand, the results suggest that the proportion of shoots feeding after the shooting season has ended has declined to 86% from an average of 94% across the three previous seasons. Feeding the remaining released birds until adequate natural food is available is recommended best practice within the Code of Good Shooting Practice. It is an important activity to continue and also benefits other farmland birds.



MEMBERSHIP OF SHOOT ASSURANCE SCHEMES BUILDS

Assurance is essential for driving high standards and developing game meat markets

Quality and reputation are key to the game meat market, so membership of a shoot assurance scheme allows shoots and the industry to ensure their practices and the provenance of their game meets rigorous and ethical standards. The British Game Alliance launched its independently audited British Game Assurance Scheme and kite mark a year ago, so it is encouraging to see that support for self-assurance is building. Of our survey participants 41% are now members of a shoot assurance scheme.

CURRENT CONSERVATION WORK INCLUDES:

81%

have established buffer strips and/or field corners

86%

have established wild bird seed mix

50%

have established pollen and nectar mix

47%

have established conservation headlands

86%

feed their birds after the shooting season

14%

have taken up a supplementary feeding agri-environment scheme option

23%

voluntarily feed songbirds

86%

have managed woodland in the last ten years, averaging 308 acres each

52%

have planted woodland in the last ten years, averaging 24 acres each

Source Savills Research

£3.75

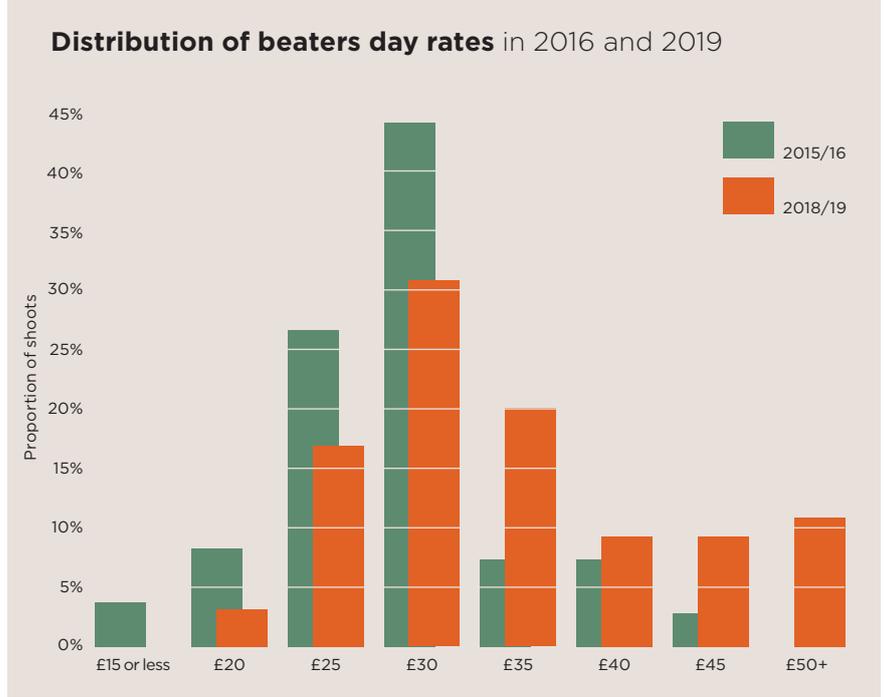
The cost of an average pheasant poult

£18.3k

The average salary for a beat keeper

£5.21

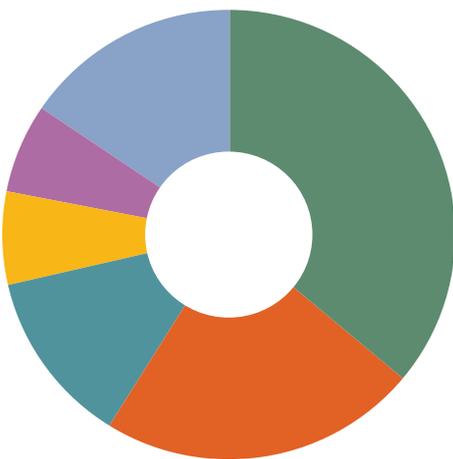
The average fixed cost per bird put down



Source Savills Research

Counting the cost

Variable costs per bird put down



Source Savills Research

“Over the last three seasons, the average pay rate for beaters has increased by 20% and day rates have become more variable”

Financial pressures

Shoot economics continue to be finely balanced as inflating costs necessitate increased charges

Income

The 2018/19 season results show that shoots increased their pheasant charge per bird by an average of £1.88 for the 2018/19 season (5.3%). Partridge charges were similarly increased by £1.85 (5.2%). On 47% of participating shoots, the average income per bird shot on let days was lower than the price quoted per bird, and this is due to the leeway offered before overages are charged. The birds that are not charged for effectively suppress the average income per bird.

Costs

Variable costs per bird put down were £9.25, 7% higher when compared to the 2017/18 season. This was mainly due to 9% higher feed costs as a result of higher cereal prices during last summer and autumn. Beaters' and pickers' up pay per bird put down is the third largest variable cost (see chart left) and increased by 13%, the underlying average day rates for the two roles increased by 8-9%.

Over the last three seasons, the average pay rate for beaters has increased by 20% and day rates have become more variable. The graph above shows that in the 2015/16 season the majority of beaters were paid £25 or £30 per day. Since then, the average rate of pay has increased by £5.70 per day and the sample is

distributed across a wider range of values.

Overall the average total cost per bird put down was £14.13. Around 35-40% of birds are shot, so the cost per bird shot is higher, averaging £39.24. The average income per bird shot on let days is £36.92, so a shoot that achieves average performance would lose £2.32 per bird shot. This demonstrates why it is important to fully scrutinise income, expenditure and performance before fixing future charges. For example, in reality the cost per bird shot increases through the season due to extra feed costs and greater non-shooting or natural losses of birds. To reflect the fact that the cost of a bird shot in January is higher than in November, shoots could develop a more flexible approach to late season days and consider selling smaller or fixed price days.

Future plans

Looking ahead to next season, 63% of shoots plan to increase their charges. This is fewer than last year. 84% intended to increase their prices for the 2018/19 season, and the results we have observed relating to that season suggest their intentions were carried through. Where shoots are planning to increase their prices for the 2019/20 season, on average they intend to increase their pheasant charges by £1.53 and partridge by £1.36.



Savills Research

We're a dedicated team with an unrivalled reputation for producing well-informed and accurate analysis, research and commentary across all sectors of the UK property market.

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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.