

Spotlight | 2017

# Shoot Benchmarking Survey



**Summary** Finances are improving, yet the majority of shoots are making plans to charge more per bird and shoots are less optimistic about the 2017/18 season compared with 2016/17

■ **Shoot economics remain finely balanced.** In 2013/14, 59% of shoots with income from let days made a loss. Through cost control and higher charges, finances have improved, although 43% still made a loss in 2016/17.

■ **Shoots continue to make a strong environmental contribution,** but teething problems with the Countryside Stewardship Scheme may have reduced participation slightly.

■ **83% of shoots with grey partridges report that numbers are stable or increasing.** 59% of shoots with grey partridges manage habitat specifically to benefit them.

■ **Shoots are less optimistic about the 2017/18 season than they were about the 2016/17 season.** Uncertainty, associated with Brexit, and disease concerns, is most likely responsible.

■ **58% of shoots plan to increase their charges for next season** (on average by £1-2 per bird). However, 2% intend to reduce them, suggesting they have experienced resistance to their pricing.

**About our Survey** This year's Shoot Benchmarking Survey is based on 155 shoots in England, Scotland and Ireland, and focuses on the economic and environmental performance of driven game shoots. Each participant receives a free detailed personal report that anonymously compares their operation with similar sized shoots. To be part of the next Survey, please email [dsteel@savills.com](mailto:dsteel@savills.com)

# A focus on figures

The latest Survey on the 2016/17 season gives an unrivalled look at the performance of shoots across England, Scotland and Ireland

The Savills Shoot Benchmarking Survey uniquely focuses on the economic and environmental performance of driven game shoots. We recognise that the objectives, structure and size of shoots are diverse, and we have therefore designed our benchmarking so that all types of shoots can benefit from taking part.

Our latest results are based on 155 shoots – the most participants in the Survey’s seven-year history – in England, Scotland and Ireland. They shot more than 3,300 days in the 2016/17 season, put down more than 1.6 million birds and employ 250-plus full- or part-time staff, generating a turnover in excess of £16 million.

Survey participants receive a detailed personal report with tailored information, letting shoots to anonymously compare their operations with similar shoots.

Once again, we are pleased to run the Shoot Benchmarking Survey in partnership with the Game & Wildlife Conservation Trust. The team combines Savills property management and sporting knowledge with the GWCT’s highly respected work in exploring how shooting contributes to the conservation of landscape, habitat and wildlife.

**38%** The average return (meaning 38% of the birds released were subsequently shot)

**£12.55** Average cost per bird put down

**60%** of shoots sell some days on a fixed price per day

**37%** have established pollen and nectar mix

**58%** The proportion of shoots planning to increase their charges for the 2017/18 season

**£33.92** Average cost per bird shot

**53%** self-fund environmental work

**67%** of shoots are part of a paid agri-environment scheme

**£16,600** plus benefits was the average salary for a beat keeper

**£35.21** Average price charged per pheasant shot

## Conserve and protect

**Grey partridge conservation**

Our Survey highlights how shoots can help 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 59% of these shoots undertaking specific management to benefit them. Some 83% of those with grey partridge report that numbers are stable or increasing. We are encouraged that 26% of the shoots with greys

**Environmental support**

A high proportion of shoots provide and manage wildlife habitats on farmland through funded agri-environment schemes and voluntary measures. Interest in agri-environment schemes remains high: 79% expect to join a

successor scheme when their current agreement ends. Work has included:

- **78%** of shoots have established buffer strips and/or field corners
- **77%** have established wild bird seed mix
- **37%** have established pollen and nectar mix
- **41%** have established conservation headlands (selectively sprayed and fertilised or low-input cereal headland)
- **93%** feed their birds after the season.

# Shoot performance

From poult price to beater pay, the Savills Shoot Benchmarking Survey analyses a shoot’s cost factors to highlight key trends

**Poult price**  
The average pheasant poult price has changed little over the last four years, while partridge poult prices have also been consistent for the last three seasons. This follows a period of rising prices. Compared to seven years ago, prices are 7% and 13% higher respectively.

**Price charged per bird (excluding VAT)**  
Shoots increased their charges per bird, but not to the extent they had indicated when we surveyed them in February 2016. Partridge charges were 3% higher than last season. Charges tend to be above average on larger shoots, and below on smaller shoots. The difference in charge rates between the two groups is 10% for pheasants and 27% for partridges. The average income per bird shot on let days is typically lower than the quoted price per bird, due to overages, meaning payment is not received for all birds shot. It was £33.08 in the 2016/17 season.

**Staff salaries**  
Salary reviews on shoots have reflected trends in the wider economy. So, 17% of shoots did not increase salaries during the year, while 51% increased them by up to 2%. The most common reported agreement was a 2% pay rise, which was awarded on one-third of shoots. The overall average was a 2.5% increase, reflecting a small number of larger pay rises.

We benchmark salaries and benefits for head keepers, beat keepers and single-handed keepers. During the 2016/17 season, the average salary for a beat keeper was £16,600, plus benefits. For 86% of beat keepers, a house was included in their remuneration package.

**Beaters and pickers-up pay**  
The Survey shows that pay for beaters and pickers-up is the fourth largest cost for shoots. Most pay beaters £25-35 per day and pickers-up £30-45. Lunch is often provided, too.

On average, day rates are higher on larger shoots. Day rates tend to increase in £5 increments, and average rates have increased by 18% for beaters and 19% for pickers-up since 2010/11. However, the cost per bird put down has not increased by the same proportion. This suggests less staff are used on the day, or shoot days are larger and/or fewer in number.

**Poult prices** Prices have stabilised over the last three years

Average price paid (£/poult)	2009/10	2010/11	2011/12	2013/14	2014/15	2015/16	2016/17
Pheasant	£3.40	£3.43	£3.55	£3.65	£3.64	£3.64	£3.64
Partridge	£3.78	£3.78	£4.00	£4.13	£4.25	£4.21	£4.26

Source Savills Research

**Bird charges** Shoots are increasing their price per bird

Average price paid (£/bird) (excl VAT)	2009/10	2010/11	2011/12	2013/14	2014/15	2015/16	2016/17
Pheasant	£30.04	£30.15	£32.38	£33.58	£33.19	£35.12	£35.21
Partridge	£28.29	£29.26	£30.95	£33.44	£33.30	£34.42	£35.30

Source Savills Research

**The Code of Good Shooting Practice**

Compliance with the Code of Good Shooting Practice is the foundation for sustainable game management and helps provide re-assurance for visiting guns that a shoot is run well. It is encouraging that 95% of participating shoots would support a voluntary initiative to promote more widely, compliance with the Code.

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# Costs

Over the last three seasons, shoots have started to control their costs better

## Total variable costs per bird put down

Birds, feed and pay for beaters and pickers-up account for 75% of the variable costs for an average shoot. Compared to the 2015/16 season, the bird cost per bird put down was 7% lower (£3.04). The average feed cost was 3% higher, while the costs for beaters and pickers-up were similar. The total variable costs per bird put down were £8.05, 16p (2%) lower than in the 2015/16 season. The difference is small, but can be significant because it will have a larger impact on the cost per bird shot, and we generally find around 15% of shoots are within £1 per bird of breakeven.

## Total fixed costs per bird put down

Total fixed costs per bird put down are lower than variable costs per bird put down. Most of a shoot's fixed costs relate to salaries, staff housing, rent for sporting rights, cover crops and vehicles. For the 2016/17 season, fixed costs per bird put down averaged £4.91, very similar to that of the 2015/16 season.

## Total costs per bird put down\*

Overall total costs were 2% lower than for the 2015/16 season, at £12.55 per bird put down. They are 9% below their peak of £13.76 in 2013/14. Since then many shoots have successfully cut costs and increased incomes. This means fewer are making a loss per bird shot. In 2013/14, 59% were making a loss. This has now reduced to 43%.

\*This only includes shoots that provided variable and fixed-cost data, so is not the sum of total variable costs plus total fixed costs as those calculations included shoots that only provided one set of costs.

## Outlook

Shoots expectations for the 2017/18 season, were, in general, less optimistic than a year ago. The picture for bookings was mixed, with some reporting they had more and others fewer than usual.

On a positive note, we found that 72% of shoots were planning to release the same amount of birds for next season – 5% higher than a year ago, which suggests numbers being released are stabilising.

Also, 58% of shoots were planning to increase their charges for the 2017/18 season, typically by £1-2 per bird, with the average being £1.83. Charges are generally increased on 50 to 60% of shoots each year.

Our research shows that shoots in high-demand areas, offering high-quality sport and excellent hospitality easily fill their days. So, the reduced optimism would seem to be linked to wider concerns, which include:

■ **Risk of disease** There are concerns about an outbreak of avian influenza and its impact on rearing and release plans

■ **Public opposition** Shoots could attract more attention from anti-shooting activists

■ **Game meat sales** Several game dealers have gone out of business, and shoots need a sustainable market for their dead game meat

■ **Rating of sporting rights** Currently applicable in Scotland, this will be an added cost to factor into shoot budgets

■ **Brexit** This could be a concern if the supply of eggs, chicks or poults is restricted from the continent, from where a high proportion are currently imported.

These concerns are significant, but can be 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.

**Marginal changes for 2016/17** Variable costs were down, fixed costs up and total costs have decreased

	2009/10	2010/11	2011/12	2013/14	2014/15	2015/16	2016/17
Average total variable costs per bird put down	£7.33	£8.08	£8.06	£8.57	£7.98	£8.21	£8.05
Average total fixed costs per bird put down	£6.32	£5.81	£4.67	£5.34	£5.24	£4.89	£4.91
Average total costs per bird put down	£13.33	£12.28	£12.42	£13.76	£12.96	£12.86	£12.55

Source Savills Research

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