

Shooting Season Sentiment Survey

2020

Many of our clients are concerned about the impact of Covid-19 on their shoots. The results of this survey show the extent of the disruption it could cause

I am delighted to share the results of this special survey. We are all living in extraordinary times and there is huge uncertainty ahead for many rural businesses.

Shooting is by no means alone in this, but, with long lead-in times, major decisions and significant financial commitments need to be taken months or sometimes even years ahead of the season. It's no wonder that the industry is deeply concerned.

Our teams have been inundated with all manner of questions and requests for advice, ranging from staffing issues, such as furloughing, redeployment, health-and-safety, training and lone working, to sporting rights agreements, cover crop management, game cover seed storage, public access, PR, local employment, finance costs and many more.

However, the most frequently asked question is what are others doing? In order to help answer the question for our clients we conducted this survey to offer a general sense of direction and provide evidence and comfort to those tasked with making difficult decisions ahead of the season.

Almost 300 shoot owners (87% run their own shoot, with the balance leasing out the sporting rights) responded to the survey in a matter of days. The key findings are below. Please get in touch if we can help in any way on this or other matters.

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RURAL ASSET MANAGEMENT

Key findings

The good news, according to our survey, is that exactly half of respondents are carrying on with their shoots as normal and 55% have taken deposits allowing them to proceed with ordering birds.

A third are scaling their shoots back, with only 17% so far cancelling them entirely. Although of those planning to cut days, some were losing as many as 25. It seems as if the bigger, or more commercial the shoot, the more likely it is to have been cancelled.

The headline figure of 83% of shoots carrying on in some form or another does paint an encouraging picture. However, only 40% of respondents say

SHOOTING SEASON INTENTIONS

50%

Carrying on as usual

33%

Scaling back

17%

Cancelled

Source: Knight Frank Research, 2020 Shooting Season Sentiment Survey

◆◆
We are closing down the commercial shoot, but rearing enough for a family day
◆◆

they have terms of business that protect them if they have to cancel days before the season. And only 7% appear to have insurance to cover cancellations. When you put these two elements together it does provide quite a liability for those shoots pressing on.

Encouragingly, half of the respondents confirmed that the demand for days has remained the same. Three quarters of those still offering shooting plan to keep their costs the same, which will be a relief for guns.

For those that let their shooting, we were pleased to see that 60% of their tenants were proceeding with the

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**We are proposing a
 pay-as-you-go option if
 the shoot can operate and
 sell days**
 ◆◆

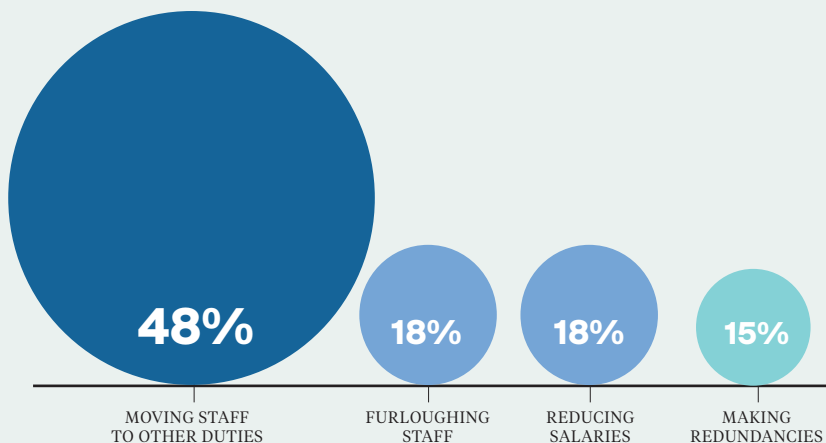
season and only 31% had asked for a sporting rent discount or holiday. However, a significant number of respondents – 18% – say they are still unsure whether to enforce the terms of agreement they have with their tenants.

In terms of the concerns expressed by our respondents, by far the biggest was whether there would still be some government-imposed movement restrictions during the season, followed closely with the practicalities of whether it would be possible to implement social distancing.

When it came to staffing issues, our survey showed very few gamekeepers had been made redundant, furloughed or had their salaries reduced. A slightly higher number has been assigned to other duties, but in the main the picture was positive for most employees.

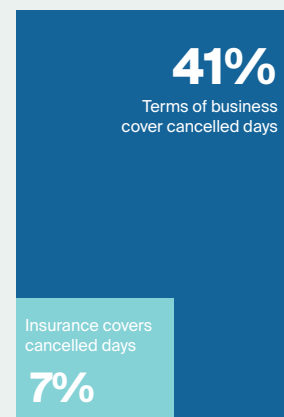
STAFFING DECISIONS

Based on shoots cancelling their entire season



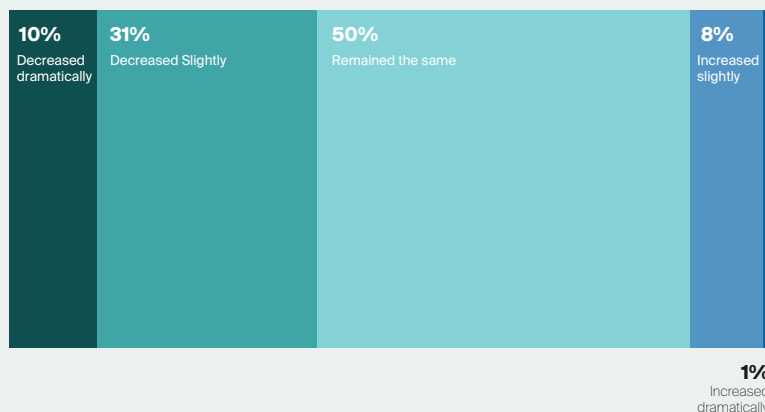
PROTECTION

Based on shoots carrying on with season



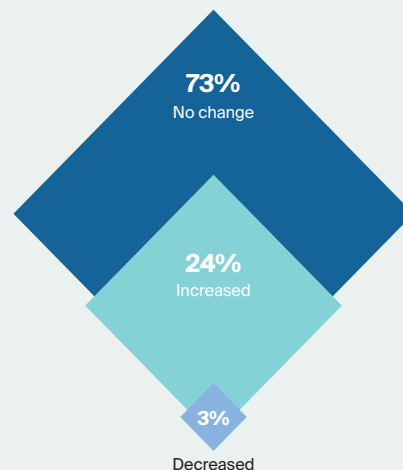
DEMAND FOR DAYS IN 2020

Based on shoots carrying on with season



COST OF DAYS IN 2020

Based on shoots carrying on with season



Final thoughts

We are pleased to see that shooting in the main appears to be pressing on. Hopefully as the next few weeks unfurl, the government will start to reveal details of its “lockdown” exit strategy, which will provide some guidance on how shoots can operate.

If social distancing rules remain so tight that they make shooting impossible, then they will probably render most other country pursuits impossible as well. The resulting impact on the rural economy may well make the government think again and have to find a satisfactory middle ground.

Hopefully, the statistics in this report are helpful to shoot owners, but we would urge them to be mindful of some

of the more day-to-day issues that we have been advising on. As always, our role as rural advisors is to highlight the detail which is where we know the devil lies.



Every shoot is at the heart of its own little community



In particular, redeploying gamekeepers to other roles needs careful management as contractual, H&S, training and lone-working issues can all arise. Land under game cover year after year could also welcome a break, but only if the right alternatives and management action is put in place.

We are yet to see a sporting lease with break clauses covering the current situation and are therefore advising on some delicate negotiations at the moment.

Finally, shoots, to many, are more than just a pastime or a business – every shoot is at the heart of its own little community. When you list everybody involved, from beaters to caterers, even in the smallest shoot it comes to quite a number.

We have been encouraging good communication with all those involved, especially as many in the beating line are older, live on their own and very much look forward to the next season a couple of days after the last has finished.

If you have any questions about the survey results or would like advice relating to any of the matters covered please do get in touch.



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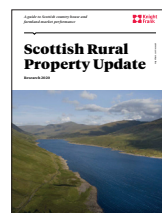
The Wealth Report
2020



Rural Report 2019



English Farmland
Index - Q1 2020



Scottish Rural
Index - H2 2019



Private View 2019



Luxury
Investment Index

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