

Shooting Season Sentiment Survey

2021

Many of our clients remain concerned about the impact of Covid-19 on their shoots. The results of this survey show the extent of the disruption it caused last year and help identify the potential shape of the forthcoming season

We created this “one-off” survey last year to help our clients and contacts involved with lowland shoots make decisions during what was a highly unusual and uncertain situation. It seems hard to believe that 12 months later the virus is still very much with us and is likely to present difficulties for next season.

The government has created a roadmap that will hopefully take us out of lockdown and further movement restrictions, which we very much hope will allow for a normal shooting season this year. As yet, we don't know how overseas guns will be affected by any ongoing restrictions on international travel.

Our teams have been dealing with a number of shoot-related issues during the past 12 months. These have ranged from furloughing, staff redeployment, sporting rights agreements, cover-crop management, alternative cropping, budgeting, PR and H&S.

We have also had a number of conversations with our clients about the long term-plan for their shoots and there is definitely a trend emerging. Many appear tired of running larger commercial shoots. It is easy to understand as the pandemic has cost some of them a lot of money, but other

factors appear to be at play. These revolve around the long-term sustainability of larger shoots, the impact on biodiversity, the lack of cancellation insurance, staffing issues, PR implications, issues with eating game and the future of shooting as a whole.

Many mentioned the enjoyment offered by having just a few family days. Some thought a smaller family shoot was more “sustainable”. As with many other parts of our lives, it seems that Covid-19 could be a catalyst for change in the way we shoot, which some may argue is not a bad thing.

In running the survey again, we thought it would be extremely helpful to gauge the real impact of the pandemic on the last shooting season and, looking forward, decipher how those tasked with yet another difficult decision are thinking in terms of the next season.

We very much hope that these two surveys have been helpful. We have taken the decision not to run it again next year because by the 2022/23 season we expect (and very much hope for our clients) that Covid will not have a material impact on the shooting season. A huge thank you to all who have participated.

ALASTAIR PAUL
JOINT DEPARTMENT HEAD -
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“Demand is very strong for next season. We will be repaying the loyalty of those who stood by us last season”

SURVEY RESPONDENT

BIG NUMBERS

5%

Our insurance covers us for cancelled days

49%

We are members of a shoot or game assurance scheme

88%

We don't expect to have issues sourcing birds

Source: Knight Frank Research, 2021 Shooting Season Sentiment Survey

Key findings

Perhaps surprisingly, almost half of the shoots surveyed did not make changes to their plans for the past season. It may well have been that they were committed before the true magnitude of the pandemic unfolded. However, 31% did make pre-emptive changes, reducing the number of birds they put down and deciding to shoot fewer days. Only 16% decided in advance to cancel their shoot for the entire season. While we know this seemed like a brave decision at the time, with the benefit of hindsight, it was certainly a financially prudent one.

For the forthcoming season the majority of respondents expect it to be business as usual, with 62% planning to

◆◆
“All deposits are non-returnable. Clients must share the risk this year”
◆◆

SURVEY RESPONDENT

put down similar numbers to the 2019/20 season and hold the normal number of days. Almost a quarter are going to run a reduced shooting operation, but very few appeared to be planning a wholesale change to their shoot, such as just holding family days, shoot only wild birds or not shoot at all.

Most respondents thought that the demand for shooting would increase for next season and most thought the cost

of running a shoot would also increase. Interestingly 88% did not expect to have issues sourcing birds from their usual suppliers.

Last season, 63% of our respondents either furloughed shoot staff or moved them to other duties. Very few took more drastic action with just 20% of staff having their salaries reduced and only 17% being made redundant.

In terms of the financial impact of Covid-19 on the last season, we asked respondents to estimate the amount of income they had lost due to the inability to operate their shoot in the way they normally would. The results vary, but virtually all respondents were affected (see chart below) to an extent. Although 36% said they lost less than

FOR THE 2020/21 SEASON WE...

PUT A NORMAL NUMBER OF BIRDS DOWN AND SOLD WHAT WE COULD

47%

PUT A REDUCED NUMBER OF BIRDS DOWN AND SOLD FEWER DAYS

31%

DIDN'T PUT ANY BIRDS DOWN AND CANCELLED THE SEASON

16%

DIDN'T PUT ANY BIRDS DOWN AND ONLY HAD FAMILY DAYS

5%

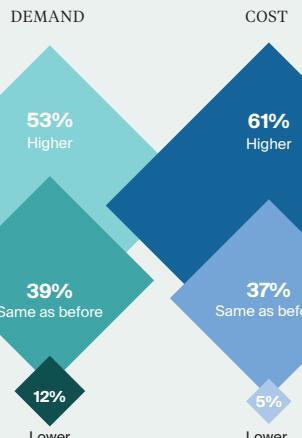
DIDN'T PUT ANY BIRDS DOWN AND SOLD WHAT DAYS WE COULD

-1%

LAST SEASON DUE TO COVID-19 WE LOST...



WE THINK THE DEMAND FOR, AND COST OF, SHOOTING NEXT YEAR WILL BE...



FOR THE 2021/22 SEASON WE WILL...

4%

not shoot at all

5%

put fewer birds down and not sell days

6%

put no birds down and hold family days only

23%

put fewer birds down and sell fewer days

62%

put a normal number of birds down and sell a normal number of days

£10,000, 11% said that they took a hit of over £100,000.

Only 5% of shoots said they had insurance for shoot cancellation. It appears already for the 21/22 season that some shoots are looking to protect themselves by asking for higher deposit levels, and much earlier on.

An area where we have been particularly busy concerns shooting tenancies and whether to demand rent or not in a force majeure situation. According to the survey, of those with shooting tenants, exactly the same number – 44% – had demanded the same rent as last year as had not demanded any, while 11% had demanded less.

This has certainly been a very difficult area and negotiations have been protracted. We have found a helpful outcome in some situations advising shooting landlords to not charge rent for the lost season but to instead agree that the tenant repays it

over the next two or three seasons as their cash flow position improves.

We also asked whether respondents were members of a shoot or game assurance scheme. Given the prevalence of assurance schemes in the wider agri-sector we were surprised that under half said yes.



"As an estate, we are moving towards fewer birds, less shooting and lowers costs.

And hassle"

SURVEY RESPONDENT



Clearly there is some work for the industry as a whole to comply with a common (and defendable) standard.

We also asked respondents to share any other views and thoughts they might have. This generated a wide range of opinions, but there were some interesting common themes. It was

strongly felt that industry assurance standards are important and some felt that higher standards than currently available are required.

There was clear concern for the future of the industry as a whole with obvious irritation from some that commercial 'big bag' shoots were damaging the reputation of shooting. Some expressed concern that foreign guns might not be able to travel over to the UK, which for some shoots might have a disproportionate impact.

One view that a few stated was that their paying guns or clients should bear some of the financial 'pain' that they had felt. How this would actually happen in practice is another matter. There was certainly a common theme of hope that next season will not be interrupted allowing shoots and shooting businesses to recover and rebuild.

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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