



The Game Shooting & Fishing Census | 2013



FAIR GAME

Revealed: What Guns and Rods really want

The UK's most extensive survey of 4000 Guns,
Rods, Shoot and Fishery owners



*“58% of those surveyed
go shooting and fishing.”*

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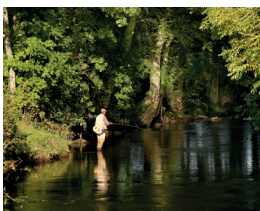
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“The total area of the shoots that responded to the survey was over 1 million acres, which is larger than Cornwall.”

INTRODUCTION

The remarkable growth of GunsOnPegs, now with over 51,000 members, alongside the expertise of Strutt & Parker, has enabled us to conduct the UK's first Census into game shooting and fishing.

The expectations of those that participate in field sports and the quality of sport provided must be matched closely to ensure the long term sustainability of the sports we love.

As costs steadily increase it is vital that the shoot and fishery owners adapt their offering to ensure they continue to attract a share of the leisure spend available.

This Census provides a fascinating insight into both shooting and fishing and contains useful information about what to expect, the current costs and the trends that are developing.

“32% of shoots offer tea and coffee on arrival yet 85% of Guns expect it.”

FOREWARDS



James Horne

CEO, GunsOnPegs and RodsOnRivers

Having been a keen shooting person for many years, I took over my first shoot near Newmarket. It was through this shoot that I met the original founders of eBay and this led to the idea of a version of eBay for shooting, so GunsOnPegs was born. It is a free to use impartial service for both members and shoot owners for the buying and selling of both single guns and full game shooting days. GunsOnPegs now forms part of an umbrella holding company called the ITap Group which includes RodsOnRivers and GunDealer and has, combined, over 70,000 members. They have enabled us, with our partners at Strutt & Parker, to deliver the UK's most comprehensive game census.

“Our results demonstrate clear opportunities for shoots and fishery owners to significantly improve the service they offer.”



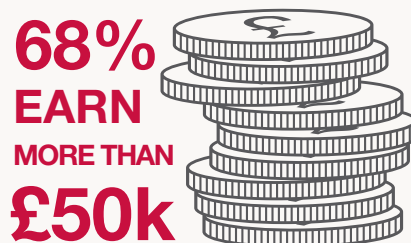
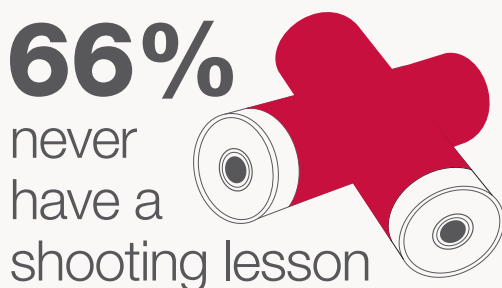
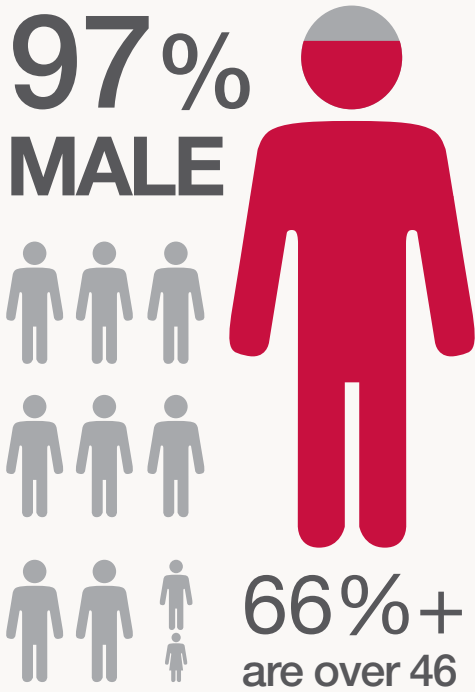
Rhodri Thomas

Partner, Strutt & Parker

Strutt & Parker is one of the UK's leading property firms, and Land and Estate Management has been at the very heart of our business for the past 128 years. Our roots in land really do go deep. This is why I am so delighted that we have been able to work with James Horne and the team at GunsOnPegs to compile this Census, the most comprehensive of its kind. Nearly 4,000 people have contributed to the results, so the findings have given us an unparalleled insight into the game shooting and fishing worlds, which I hope will help to drive the development of these sports which are so important to the countryside and rural economy and provide those involved with much food for thought.

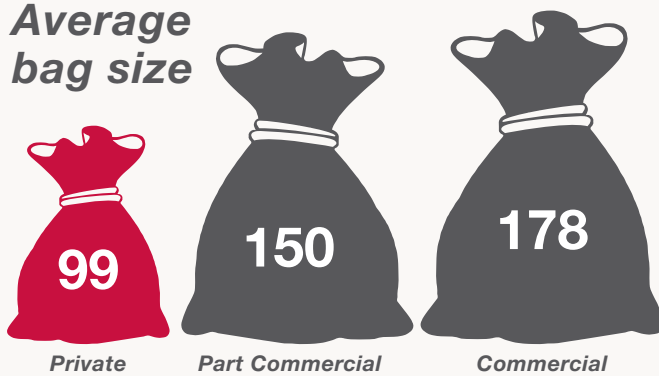
Average GUN PROFILE

Below you will find a number of key stats from our Census;



Average
**SHOOT OWNER
 PROFILE**

**Average
 bag size**



82%

of shoots require
 guns to have Public
 Liability insurance

Average acreage
 per shoot was
**OVER
 4,100
 ACRES**

(The total area of
 the shoots that
 responded to the
 survey was over
1m acres, which is
 the size of Cornwall)



**32% SHOOTS OFFER
 coffee and tea / food on arrival,
 yet 85% of Guns expect it**



**AVERAGE
 PRICE OF A**

**pheasant is £30.17
 partridge is £29.09
 duck £26.23 (all prices ex VAT)**

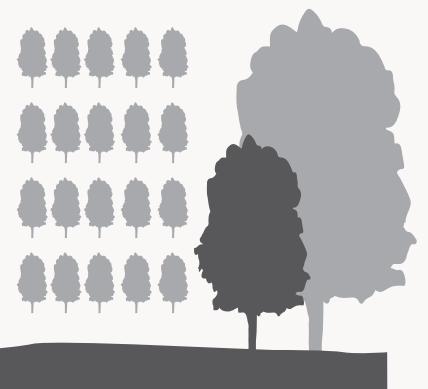


40%
 of shoots
 number
 from the left



60%
 from
 the right

Average
 acreage of
 game cover
**22
 acres**



The DETAIL BEHIND THE HEADLINES

Additional stats from our Census, further details available on request.

Gun Survey

Gun Facts

Average bag size = **131** (*previous season 121*)

85% prefer high bird shoots

70% of Guns would prefer to shoot over wooded valleys

53% of Guns prefer to use a 4x4

33% prefer a gun bus

82% like to use fibre wadded cartridges when shooting game

90% like to stay within 10 miles of the shoot

30% stay away > 6 nights a year

28% are happy to pay £200+ on a hotel

41% of guns expect birds dressed

43% do not accept the principal of overage, with **75%** saying they are only prepared to pay for the agreed bag

77% of guns want to shoot on agreed bag

54% are part of a roving syndicate

6.9 = number of days purchased

(*1.6 = number of days purchased on behalf of others*)

The average number of shotguns owned = **3.7**

75% insure guns through their home insurance

72% like to shoot outside their local area

Over **70%** expect to receive elevenses

Only **14%** would expect champagne

Over **60%** expect to receive a 3 course meal either at lunch or after the shoot

Nearly **25%** of those that pay by cash do not wish to in future

70% never receive a contract from the shoot

Over **60%** agree that shoots should advise on cartridge selection

33% go to a simulated shoot in a year

Shoot Owner Survey

Shoot profile

16% of shoots are in Scotland and **30%** in the South

50% of shoots consider themselves to be a high bird shoot

40% describe their shoot as being wooded valleys

64% of shoots offer 4x4 access

21% of shoots offer a gun bus

60% of shoots stipulate that fibre wadding cartridges should be used

25% of shoots offer accommodation on the shooting estate

54% have arrangements with local hotels

66% advise pickers up to take care about leaving game for guns with dogs to collect

34% offer dressed birds

51% do not advise on cartridge to bird ratios..... so, how do they deal with overage issues?

54% don't charge overage (*last year 28%*)

56% of shoots are owned vs **44%** are Leased

63% only sell full days, **55%** sell individual Guns

29% of shoots consider themselves to be Commercial, **31.3%** part commercial and **39.2%** are Private **56%** have a syndicate

48% describe their topography as rolling land and **27%** as lowland

59% have wildfowl and **47%** have deer. Less than **50%** shoot ground game

Average Game cover acreage is 22 acres

Stocking shoot	%
Day olds	20.6 (twice as many commercial shoots take in day olds)
Poult	66.7 (75% of all part commercial and private shots use poult)
Rear your own	19.7
Ex layers	7.9
Wild birds	14.5 (shoots believe that between 13-15% of their birds are wild)

Average price	Per Poul	Day old
Partridge	£3.84	£1.14
Pheasant	£3.47	£1.04

Purchasing

Payment methods offered: **86%** cheque, **66%** cash, **72%** bank transfer, **9%** debit/credit card

Nearly **50%** of all shoots require a **50%** deposit, **19%** take no deposit!

55% of all shoots require the deposit on booking, **25%** 3 months or more before

17% of shoots are now registered as Sporting Clubs

58% of shoots provide a contract, yet **70%** of Guns say they have never received one

44% of shoots do not pay VAT

Most common method of booking is over the phone (**92%**) and via Internet

Insurance

36% of shoots recommend Guns take out cancellation insurance, yet only **9%** of Guns do!

51% of shoots offer another day in the event of a cancellation (**12%** do not)

If a gun fails to attend, **72%** do not offer money back, **21%** offer an alternative day and **7%** return the money

Only **37%** of shoots offer a formal safety card, whilst **98%** do a briefing

Hospitality

69% of shoots offer elevenses and over **70%** of Guns expect to receive elevenses

28% offer champagne yet only **14%** would expect it

76% of shoots offer a 3 course meal, yet only **60%** expect to receive one either at lunch or after the shoot

28% of Guns prefer the pegs 40 metres apart however **18%** of shoots offer this. The majority (**64%**) are happy with 30-35 metres

Most shoots (**66.5%**) offer 5 or 6 drives each day

At **79%** of shoots you are live on the peg. **21%** start with a horn

Cartridges and Overage

Only **29%** of shoots advise on cartridges, but **61%** would like advice

83% of shoots prefer guns to pick up used cartridges

33% of shoots charge **+/- 5 or 10%**. Last year, **56%** of shoots charged this way

13% of birds charge by the bird shot, down from **16%** last year

80% of shoots do not have an underage policy

Shoot Owner Facts

Over **95%** show pheasant and 80% show partridge

Average number of birds put down was:

Commercial	10,125
Part Commercial	7,076
Private	3,399
Total in number	886,000

Average returns:

Commercial	40.66%
Part Commercial	40.06%
Private	40.28%

(Last year the average return was 40% commercial and 42% private)

	Average Pay		Average Used
	2013	2012	
Pickers up	£28.25	(£29)	5
Beaters	£23.79	(£25)	14

Over **70%** try to integrate/introduce beaters to the guns during the day

Staff benefits:

There has been a reduction across the board. Including housing provision, utility bills, vehicles, dog and clothing allowance

61% employ a Gamekeeper, who on average is paid £18,832

73% employ an Underkeeper

Source of new clients:

1st Word of mouth **72%**/Internet **24%**/Other **4%**

2nd Internet **53%**/word of mouth **23%**/Agent **16%**/Other

The DETAIL BEHIND THE HEADLINES

Additional stats from our Census, further details available on request.

Fishery Owner Survey

Fishery Owner Facts

Nearly **43%** of all fisheries surveyed were in Scotland
37% stocked their fishery and **50%** stocked with sterile fish
65% had between 1-5 beats but nearly **10%** had 21+ beats
49% had water levels affected in the last 10 years
63% employ staff, with **47%** employing a Ghillie or Beat-keeper
Less than **30%** of fishery owners provided any benefits, with
22% offering a house and **25%** a vehicle
If a rod fails to attend **73%** would not return the money
If a day is cancelled **42%** would not return the money
Nearly **80%** do not require rods to have any form of insurance

Profile

41% class their fishing as private with the rest part or fully commercial
Brown Trout, Salmon and Sea Trout are the most commonly caught species
54% offer Sea Trout fishing
31% offer Rainbow Trout
30% of fisheries had an abstraction licence on their beats

Purchasing

Over **80%** of bookings are made through email and telephone.
About **20%** are made through an agent
50% of owners require a **50%** deposit when making the booking, and **80%** of those require the deposit when making the booking
52% do not supply any form of contract

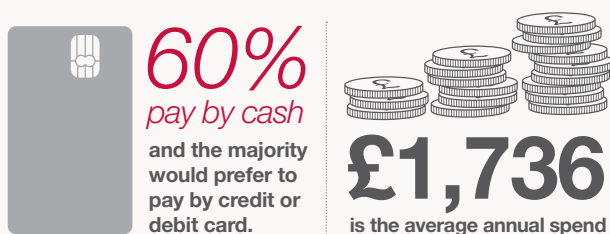
Hospitality

56% provide a set of scales
66% keep and display catch data
33% supply tackle and flies
48% offer accommodation on the estate, **65%** do not have any arrangements with local hotels
Only **2%** sell any smoked fish
12% offer boats
78% do not have webcams on their water and **63%** would not consider their use
70% allow dogs on their fishery

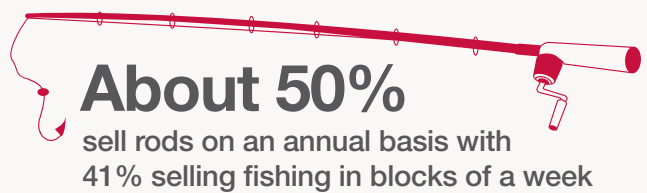
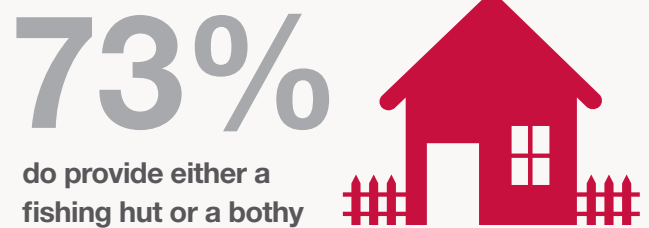
Average ROD AND FISHERY PROFILE

Rod

Fishery



- **11.8** is the average number of days purchased
- **£100** is the max spend on trout
and **£500** is the max spend on Salmon
- **33%** prefer to spend a night away
and over **50%** prefer to be within 5 miles



- Over **78%** of all fisheries were owned
rather than leased
- Nearly **70%** surveyed had salmon rivers
with only **23%** owning lakes / lochs
- **61%** have a catch limit, yet **87%** a catch
and release policy

SO WHAT DOES THE CENSUS TELL US?

With nearly 4,000 respondents offering GunsOnPegs and Strutt & Parker their views on Shooting and Fishing this is, we believe, the most comprehensive insight into our sport, reconciling the views from both sides to see whether expectations really are being delivered. What it tells us should be food for thought for us all.

If we start with results covering shoots and Guns, there's one stand-out result from this Census which shoot owners need to consider: a growing mis-match between what owners offer and what Guns want. Whilst Guns continue to spend on their sport, they're becoming choosier in these straitened times, so it's the shoots which learn to adapt to the new reality which will prosper.

What are some of the main features of this new reality?

Online and social media are no longer peripheral – with over 51,000 current GOP members there is clearly a demand for a vibrant, active market place. The enormous increase in the use of the internet and social media even in the shooting world has dramatically changed the delivery of information in our sport. Over 40% of those surveyed use Facebook. If further evidence were needed, simply wind the clock back just five years. Back then, visiting different shoots was very difficult as one relied on word of mouth recommendations and contacts; so roving syndicates were uncommon. Yet now 54% of guns say they are part of a roving syndicate and over 90% of guns now visit more than one shoot each season with 36% going to more than 5 shoots.

Shoots are in the hospitality business – this increased mobility and desire to experience more than one shoot reflects Guns' desire to see new ground with different topography, with different styles of birds being shown. But perhaps the biggest change is one of attitude – the idea of shooting as recreation, getting away for a night with a group of friends to have some fun. Over 98% of guns stay away shooting during the season, with 40% preferring to be away whenever they shoot. Roving syndicates compare their experiences at different shoots and it is not surprising that Guns arrive at a shoot with predetermined expectations. And this is where the first mis-matches occur: 85% of Guns expect tea

and coffee on arrival, however only 32% of shoots offer it. 28% of shoots offer champagne at elevenses, yet only 14% of guns expect it. With meals 76% of shoots offer a 3 course meal yet only 60% of guns expect it.

Guns are increasingly choosy – the higher priced shoots tend to be the high bird shoots. 85% of Guns stated they prefer high bird shoots, yet less than 50% of shoots described themselves as showing high birds, so how do shoots without the benefit of the topography satisfy their Guns? Fortunately a day's shooting is not just about the shooting itself; the hospitality, the atmosphere and setting are all vital ingredients for a good day. Partridge shooting used to be limited to certain areas, however now over 80% of shoots show partridge with 59% offering wildfowl. Perhaps one of the more revealing insights is the same percentage of guns prefer wildfowl shooting as partridge shooting at 41% apiece.

Allow Guns to pay how they would wish, and make sure they're insured - the payment process for shooting has lagged behind other sports with more than 90% paying by cash, cheque and bank transfer. With over 50% wishing to pay by credit and debit cards, a new product called ShootPay will allow shoots to cost-effectively and safely accept electronic payments. A surprise is that 58% of shoots say they provide contracts yet only 28% of Guns say

they receive them. Perhaps this is misunderstanding as to what constitutes a contract. Overage is a big issue and can often be the source of considerable discomfort. Over 75% of Guns reveal that they only wish to shoot the agreed bag on the day, so without some form of prior agreement how can shoots manage the situation when the bag is either exceeded or not met? Only 51% of shoots state they have a normal cartridge to bird ratio, so how do they deal with awkward situations? It was also surprising to find that 34% of Guns do not have any Public Liability Insurance, yet 82% of shoots stated they insisted guns should take this out. Equally, 36% of shoots recommend taking out shoot cancellation insurance yet only 9% actually do. With Hiscox's entry into this market via GunsOnPegs, there are some innovative new affordable products available.

Both Guns and shoots participate because they love the sport. The Census has highlighted some relatively simple measures shoots can take in order to keep their customers happy and to ensure the long term viability of their shoots.

Meanwhile, the first-ever Fishing Census has revealed a range of interesting facts and it is intriguing to assess game fishing alongside game shooting.

If you shoot, you're also likely to fish – more than half of the respondents shoot and fish and they spend a similar number of days (on average) on each. Shooting is, as expected, the more expensive of the sports, incurring an average cost per person of £5,033 compared to the £1,736 a year spent on game fishing. In forthcoming surveys we will track these figures to see how expenditure shifts and whether the crossover between interest in these two sports remains as strong. If it does, there are some implications for both shoot and game fishery owners, not least the opportunities this opens up in cross-promotion.

Make it easy to do business – game fishermen share with their shooting colleagues a wish for owners to offer a wider and more modern range of payment options, with over 50% preferring to use credit and debit cards rather than pay by cash. Fewer game fishermen have suffered financial loss when booking (4% compared to 10% for Guns) yet nearly three-quarters of fishery owners would not return money if a Rod fails to attend and nearly half would not return the money if the day was cancelled. As with shooting, this raises the issue of a need for insurance; yet 80% of fishery owners do not require Rods to take out any insurance to fish, which is surprising given the risks associated with particularly salmon fishing as the owners could be liable in the event of an incident.

Hospitality is less widespread – unlike shooting, 77% of fishery owners do not offer any hospitality though nearly three-quarters offer a fishing lodge or both. The Census indicates that improving the hospitality and/or facilities on offer can provide some scope for income generation.

For further information or to discuss any of the findings of the Census, please contact James Horne at GunsOnPegs or Rhodri Thomas at Strutt & Parker.



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