

# GROUSE MOOR NEWS

SUMMER 2011



savills



# Welcome

INSIDE THIS LATEST ISSUE OF  
GROUSE MOOR NEWS...

**T**hese are indeed challenging times for grouse moor owners, faced with the prospect of having to invest wisely to maintain the capital value of their assets during the recession. But with vast amounts of money involved, it's definitely not something that can be ignored. In this issue, we look at what the main trends are and what the long-term future holds for grouse moors.

Elsewhere in the issue, Roddy d'Anyers Willis weighs up the pros and cons of driven versus walked-up shooting. There are financial and practical implications for each approach, but only with all the information at your fingertips will you be in a position to make a truly informed decision.

Everyone likes a good debate, so when we asked a cross-section of industry experts to suggest the greatest opportunities and threats for grouse moor management, they were happy to pitch in. The result is an interesting collection of views from a wide range of people including moor owner Lord Peel, country expert Lord Percy, Chairman of the Moorland Association, Edward Bromet, Chairman of the National Gamekeepers' Organisation, Lindsay Waddell, editor of *The Field*, Jonathan Young, Martin Gillibrand, solicitor at Oglethorpe Sturton & Gillibrand and our own energy expert, Nick Green. It makes fascinating reading.

We hope you enjoy this latest issue.

WILLIAM DUCKWORTH-CHAD  
SAVILLS COUNTRY DEPARTMENT

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# On the hunt

EVEN IN A RECESSION, GROUSE MOOR OWNERS ARE INVESTING IN STOCK AND LOOKING TO THE FUTURE



**B**elt-tightening is all the rage in these straitened times but not, it seems, with grouse moor owners. Indeed, far from shedding the expense of grouse moor maintenance, many owners are investing to improve their grouse stocks. Since this is a long-term project, there is little likelihood the number of grouse moors offered for sale is going to increase soon.

Still, such a niche market is never characterised by volume, and the activity levels of the past year continue the pattern of the last four or five years. Last year saw only two sales of grouse moors – one in England, one in Scotland; so far this year there have also been two. In addition to that, the market has been augmented by a few leasehold opportunities.

“Owners tend to be wealthy enough to hang on to their grouse moors despite a recession,” says William Duckworth-Chad of Savills Country Department. “Many owners are

investing in better management to increase their stock of birds and boost the moor’s value in the long term.

“Letting a moor makes commercial sense in this context, as the lessee takes over responsibility for maintenance and improvement costs. All being well, the freeholder can regain possession of his moor

“There is little likelihood the number of grouse moors offered for sale is going to increase soon”

*William Duckworth-Chad*

in a much better state than when he leased it, having avoided any hefty financial outlay.”

The Invercauld Estate on Royal Deeside is currently offering 38,000 acres, including three grouse moors, on a long term agreement. The moors – Sluigan, the Home Beat and Corndavon – offer 11 days’ driven grouse shooting, with a 10-year average bag of 450 brace for Sluigan and Home Beat and 238 brace for Corndavon. Launched in June, the Invercauld Estate has attracted strong interest, both from private individuals and those with more commercial interests.

This growing interest in longer-term leasing is perhaps a natural extension of the trend for some owners to let shooting days, often early in the season but also if there are enough grouse left after the owner has had his sport. “Days are being let at £150 plus VAT per brace, and up to £180 in some cases,” says William. “That could amount to around £15,000 per day – a valuable source of income to the moor owner.”



## FACT FILE

In the last 27 years, there have been 35 sales of grouse moors in England and Scotland

Of course, grouse moor owners who wish to let in this way need to ensure they have healthy stocks that offer a good day's sport. And that means capital investment to improve management. "Because the value of grouse moors is based on the number of birds they yield, injecting cash into intelligent management increases their value in the long term," says William. "The standard of grouse moors in England has improved dramatically over the past few years, with tick and disease being almost wiped out through a mixture of treating sheep and the use of medicated grit. The latter brings the added benefit of reducing the number of birds looking for grit on roads, where they are easily run over.

"We've also seen English owners increase their labour force to keep vermin down and allow for more efficient management. This year, moor owners seem reasonably confident of another good season.

"Scotland hasn't had the levels of wealth

necessary for investment, and has been poorer for grouse over the last 20 years as competition from forestry, sheep and deer has increased. But, lately, some owners have been halting the decline in grouse numbers, and are achieving a transformation. In parts of Scotland, notably in Perthshire, Inverness-shire and the Angus Glens, grouse numbers are now catching up with England."

This Scottish investment should be worthwhile. As Anna Thomas of Savills Edinburgh points out, Scottish grouse moors have several advantages over English ones. The scenery is arguably more beautiful; there are fewer roads, lessening the risk to birds; the population is sparser; prices of shooting lodges tend to be lower; and there's a lot more moor.

It's crucial to take these factors into account, says Anna. "Owners of Scottish moors may be shooting grouse for fewer weeks per season, so a moor needs to offer something the rest of the year – a lodge, perhaps stalking or fishing. The property element is very important, which is why the Invercauld Estate package, with its 14-bedroom castle, is attracting such interest.

"The range of international buyers registering for Scottish sporting estates is notable. In just 24 hours in June, we registered buyers from the USA, South Africa, Italy, France, Hong Kong and Russia. Not all of these start out looking for a grouse

moor – they often view their first estate without knowing what they want – but a moor is attractive and grouse shooting often captures their imagination once they're standing in a butt!"

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"The standard of grouse moors in England has improved, with tick being almost wiped out"

*William Duckworth-Chad*



# Driven or walked up?

THERE'S MORE THAN ONE WAY OF BRINGING GROUSE TO THE TABLE, SAYS RODDY D'ANYERS WILLIS

**T**here is nothing to compare with the quality of sport afforded by driven grouse, when the birds are prolific and the weather conditions are favourable. However, it does come at a considerable cost. No wonder those with commercial grouse moors charge what may appear exorbitant prices, averaging £150/brace (excluding VAT and agents' commission) for August and September shooting.

Keepers, pickers-up, flankers, beaters and vehicle drivers all have to be paid for. On a commercial grouse moor, there could be a team of five keepers, 25 beaters and six flankers, to ensure that enough birds fly over the butts, and four pickers up, plus two vehicle drivers. When you add commission and lunch, the costs to the owner for the day could amount to approximately £2,500. Setting these costs against the charge of £7,500 for a 50-brace day leaves a surplus of just £5,000, which isn't hugely attractive.

A better result might be achieved with two 25-brace walked-up days at £4,500 (50 brace @ £90/brace), with fewer expenses than a driven day. Where grouse are walked up over dogs, £125/brace can be charged.

Some would argue that grouse shouldn't be driven for a bag below 80 brace, but sometimes smaller bags are justified. Take, for example, a moor producing 1,000 brace where the lodge is offered on a full-board basis. The season's bag can be divided into a small number of large bag days, or double the number of small bag days. To maximise rent from the lodge at, say, £200/head/night for a party of nine guns plus wives or partners, it's worth laying on a large number of smaller bag days.

With either driven or walked-up shooting,

there are things other than daily running costs to consider. Those who've taken walked-up October grouse know that getting a reasonable bag after September is difficult, with most coveys rising ahead of the guns. In good years, grouse must be shot hard, and without driving not enough birds will be killed. In later months, fine grouse shots will be required to achieve a bag and if too many birds are left at the end of the season, grouse may succumb to disease.

Financially, owners may need to maintain and enhance the value of moors. With driven grouse values over £4,000/brace and walked-up grouse values half that, the advantage of driven versus walked up is evident.

“Getting a reasonable bag after September is difficult, with most coveys rising ahead of the guns”

*Roddy d'Anyers Willis*

In an early year when grouse are strong by 12th August, there's merit in driving from the start of the season; older birds will come through the line and get shot while younger stock is preserved. This is also the time when it's easiest to make a large bag walking up.

In contrast to the expense of a driven day, a party of six guns anticipating a bag of 25 brace walking up can be overseen by just two keepers with dogs, a couple of self-driven vehicles and a basic picnic. This is a very small cost to the grouse moor owner who will take in £2,250 (25 brace @ £90/brace excluding VAT) for the day.

As with everything, you need to compromise. Drive when you can, opt for fewer, larger bags if accommodation isn't offered, control shoot day costs and drive early if birds are strong. Also, consider whether the moor merits a full team of keepers, or whether a keeper and trainee can provide enough sport at a fraction of the cost.

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## FACT FILE

Today, 96% of grouse moors are in a good condition, as opposed to 25% six years ago



## THE BIG QUESTION

# What do you think are the greatest opportunities and threats for grouse moor management?

We asked some of the industry's foremost opinion formers to give us their thoughts on the opportunities – and challenges – currently facing the UK's grouse moor owners

### THE MOOR OWNER



Lord Peel,  
*who owns 5,000 acres of moorland in Swaledale*

“There's still a reluctance to acknowledge the benefits that come from grouse moor management from some influential quarters. The devastation, both financial and environmental, that the cessation of the sport would cause would be tragic – consider the paucity of wildlife in areas which don't benefit from the influence of the gamekeeper. However, thanks largely to the efforts of the Game and Wildlife Conservation Trust, and the Moorland Association, I believe that nowadays there is a wider understanding of these benefits. Although the problems are challenging, and as long as those in a position of influence are prudent and heed current research, there's no reason why the future of grouse moor management shouldn't stay positive.”

### THE COUNTRY MAN



Lord James Percy,  
*moorland manager*

“The greatest threats are competition for land use, politics and polarity of opinion. Many people who wish to enjoy the moors for walking or bird watching cannot reconcile the shooting of live quarry, nor understand the need for control of some predator species, yet the former is the driver that creates such a huge diversity of habitat and protection for wildlife. Millions of acres of carbon-locking heather moorland have been protected by grouse moor management, unsubsidised and funded by people whose passion for conservation goes way beyond shooting. The employment that grouse shooting provides keeps rural communities thriving, schools open and hotels in business.”

### THE ESTATES EXPERT



Edward Bromet,  
*Chairman of the Moorland Association*

“This is a good time to be involved in grouse moor management in England. The Government is supportive and agrees with our aim of restoring a further 250,000 acres of lost heather moorland. Natural England has also publicly acknowledged the very significant benefits that current best practice management of grouse moors delivers. We must make the most of this climate in continuing to protect the freedom to manage our moors. The risk of fire is a significant one. However, work with Natural England and the Met Office to put in place a better warning system and improved access management at times of severe fire risk is continuing after the spate of wildfires in this year's dry spring.”

## THE SOLICITOR



Martin Gillibrand, of Oglethorpe Sturton & Gillibrand solicitors

“Seventy per cent of grouse moors are designated Sites of Special Scientific Interest (SSSI) and candidates for environmental stewardship schemes. These give farmers a financial incentive to farm sustainably, reduce flock sizes and improve livestock. But SSSI designation can also be a threat to grouse moor management, as SSSIs need consent from Natural England or SNH to carry out even routine maintenance. The extra burdens of bureaucracy and pressure from bodies with a rigid agenda and inferior knowledge of grouse moor management can be an impediment.”

## THE ENERGY EXPERT



Nick Green, Savills Energy and Rural, experienced in the development of wind farms on Scottish moors

“The benefits of wind farms or turbines on grouse moors are becoming much better understood, and provide opportunities for generating income and improving infrastructure. The roads built and maintained by the operators provide improved access for gritting and vermin control, while traffic levels are such that they're not a threat to the birds. Perhaps the most significant threat is climate change. Habitats are constantly changing and the consequences will inevitably affect grouse moor management.”

## THE JOURNALIST



Jonathan Young, Editor of *The Field*

“The greatest opportunity for grouse shooting lies in advances in medicines, coupled with diligent keeping. But one of the biggest challenges facing grouse moor owners is exclusivity. Intensive keeping is costly and owners are anxious to reduce costs by selling days. They also want to maintain the value of their moors by ensuring optimum bags. But we also need smaller walked-up moors. This means acceptance, throughout the UK, that no one does more for upland habitats than keen grouse shooters willing to invest.”

## THE GAMEKEEPER



Lindsay Waddell, Chairman of the National Gamekeepers' Organisation

“A major threat to moorland management is legislation exacerbated by public ignorance. We have some now and there is potential for plenty more, fuelled by the views of a public detached from the countryside. Some wildlife legislation simply doesn't make sense, but it is set in stone. But there is an exceptional case for continuing what we do, in the way we do it. Grouse moors contain the best of what the country has in terms of environmental and wildlife management.”

## MANAGEMENT MATTERS

Frances Barrigan looks at some of the latest news

**Wildlife crime:** As the topic of persecution of birds of prey hits the headlines again north and south of the border, new Scottish legislation introduces vicarious criminal liability for wildlife crimes in Scotland. The Wildlife and Natural Environment (Scotland) Bill received Royal Assent on 7 April 2011. Now if an employee or contractor is found guilty of the illegal persecution of a bird of prey, the owner and manager will also be guilty, unless they can prove that they didn't know about the offence and had taken all reasonable steps to prevent it.

**Temporary reprieve for Asulam:** In March, the European Commission withdrew a proposal to ban the use of the chemical Asulam, though this may be re-tabled. Since Asulam is the only product approved for aerial spraying, controlling bracken would have become almost impossible.

The impact of a ban would be far reaching, given the current agricultural subsidy regime. Similarly, the idea of banning an effective method of bracken control while tick-borne diseases are rising is questionable. In the event of a ban, a rethink will be needed, particularly for moors where bracken control forms part of an agreed management plan.

**Compulsory pension provision:** Reform of pension provisions will mean employers have to enroll employees in a qualifying workplace pension. Estates and shoots face particular complications, given the prevalence of part-time employees and those with second jobs. Workers qualify if they're over 22 and earn above the personal income tax allowance. Estates and shoots are unlikely to be affected before 2014, but given the complexities forward planning is advisable.

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