GunsOnPegs

RODS ON RIVERS

STRUTT & PARKER

THE GAME SHOOTING & FISHING *Census*

2015

Photographs by Michael Lake

63% of people feel that having fun with friends is more important than the quality of birds, host or hospitality on a shoot day.

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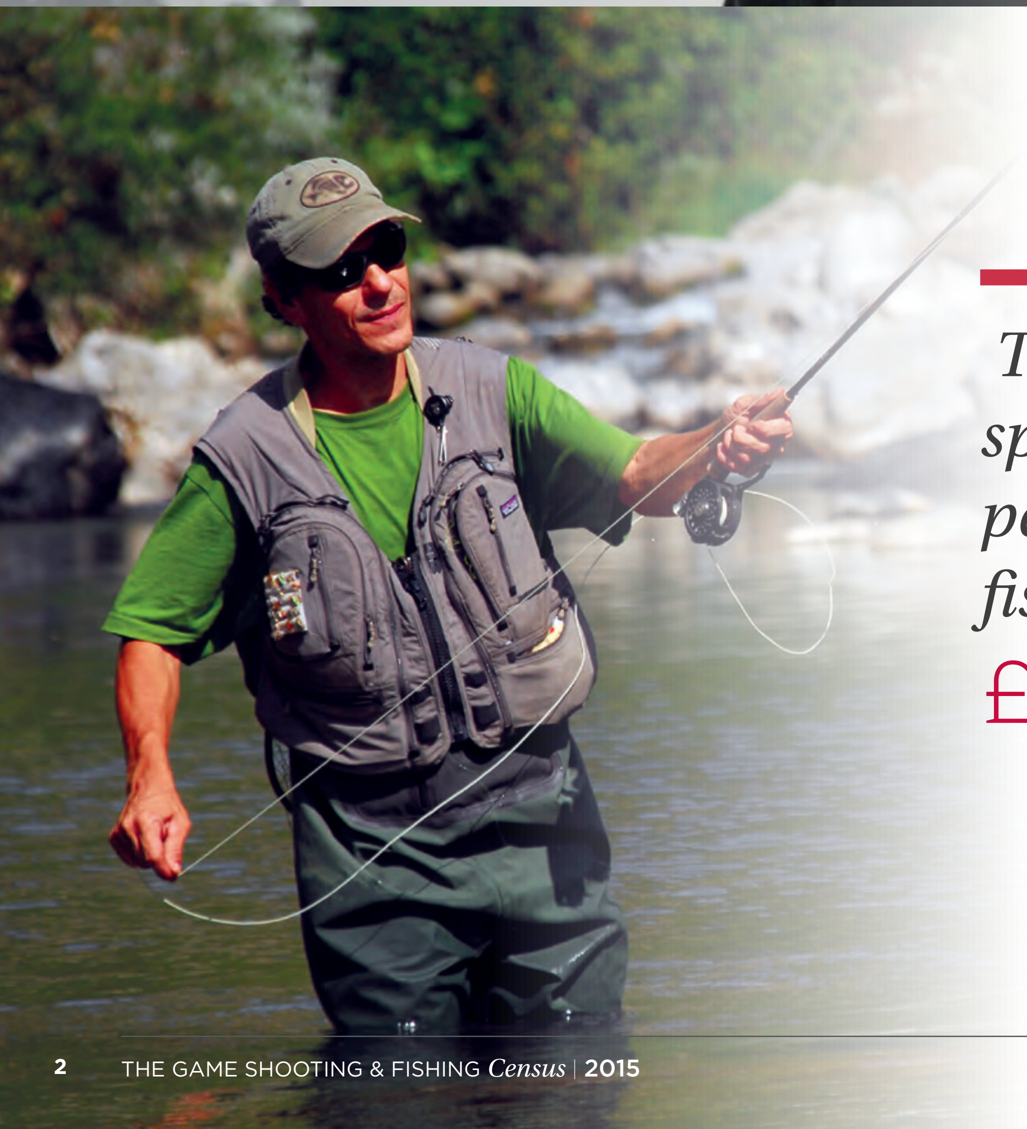
The average spend per head, per annum on shooting alone is

£5,533



The average spend per head, per annum on fishing alone is

£1,505

INTRODUCTION

The digital revolution has transformed the way we do business and communicate in our daily lives.

GunsOnPegs and RodsOnRivers now has over 85,000 members combined and continues to grow steadily. It is from this membership alongside the expertise of Strutt & Parker that we are able to conduct a substantial survey on game shooting and fishing.

During the last 12 months we have held regional seminars across the UK, meeting with a wide cross-section of providers in order to consult with them on what information they would find useful to learn about the shooting and fishing communities.

We hope this census provides guidance to the providers as well as useful information to those that buy shooting and fishing. We find that shooting is a sport that is experiencing growth at all levels, but fishing, particularly for salmon in the UK, is facing some considerable challenges.

The survey has been completed by over 3,000 respondents with a consistent demographic to the previous surveys in 2013 and 2014. This year we have endeavoured to examine international participation and we are pleased that 6% of the respondents are from outside the UK.

Shooting and fishing involve people from all walks of life and acts as a substantial contributor to the economy. The results contain useful information to substantiate this position.

 Survey conducted online from August to September 2015 and data is applicable as of print date.

FOREWORD

JAMES HORNE

Chairman, GunsOnPegs, RodsOnRivers and James Purdey & Sons Ltd.

GunsOnPegs was born out of running my own shoot in 2006. Embracing the digital world, which now seems obvious, only 10 years ago was a step change for shooting. Shortly afterwards RodsOnRivers was also created. Both are free to use and are user content managed. Now with a combined membership of nearly 85,000 users, this audience drawn from all over the world has enabled us and our partners, Strutt & Parker, to conduct this survey for the third year. James and his son Chris have developed these web platforms to offer a wide range of services to fieldsports which not only sell shooting and fishing, but also include insurance products and payment systems. In 2014 James also became Executive Chairman of James Purdey & Sons Ltd, the gunmakers in Mayfair, London in their Bicentenary year.

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 heart of our business for 130 years. Game shooting and fishing remains a vital part of the rural economy. With agriculture facing particular challenges relating to commodity prices, efficiency has never been more important at all levels of estate and farm management to secure the futures of those living and working in the countryside.

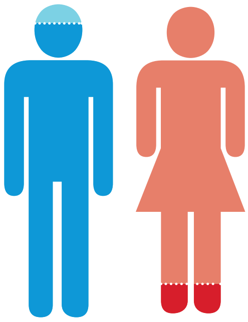
Through the seminars that we have held over the last 12 months, we have endeavoured to provide new data and information relevant to the management of those businesses. Also, after the widely reported physical successes of last year's shooting season, we are reminded not to take some things for granted and there have already been significant challenges burdening some grouse moor owners in particular, following adverse weather conditions at critical times of the year.

Through continuing to connect shoot and fishery owners and operators to those who take shooting and fishing through useful research and data gathering, we aim to continue to promote enhanced efficiency and sustainability of the businesses involved. This will ensure better understanding of what those paying for their sport are looking for. In turn, this will help the economy of the wider countryside and continue to stimulate and support important and directly related conservation programmes.

GUN AND SHOOT OWNER PROFILE

WHO GOES GAME SHOOTING?

Shooting continues to be enjoyed by a wide variety of people from many backgrounds. Whilst still mainly participated in by men, the number of ladies taking part continues to grow by 1% per annum. The use of social media, in common with national trends, continues to grow apace, with Facebook now used by nearly half of the shooting population. Instagram use has increased to 10% which demonstrates the growing importance of this media channel. 22% of respondents go grouse shooting, indicating that the survey profile is representative of the wide shooting population.



95.3% MALE

4.7% FEMALE

6% OF GUNS LIVE ABROAD

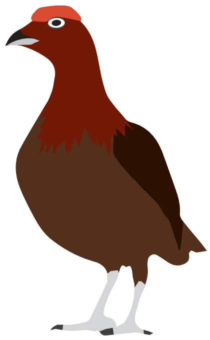
34% USE LINKEDIN

50% USE FACEBOOK

17% USE TWITTER

10% USE INSTAGRAM

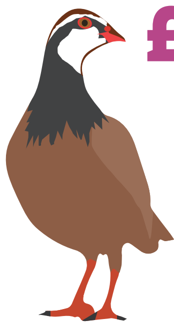
34% USE YOUTUBE



22% OF GUNS GO GROUSE SHOOTING

HOW MUCH DO PEOPLE SPEND?

38% of respondents stated that they plan to spend more this season. This suggests that the sport is in exceptional health in 2015. 48.5% stated that they would be spending the same, and only 13.5% think they will spend less. This increased expenditure is despite the rise in the cost per pheasant by 5% to £33.49 +VAT and a partridge by over 11% to £33.18 + VAT. If charging VAT, for pheasant, £40 per bird is now the average price so the VAT takes an ever larger slice of the total cost of a day. The average spend per person for last season remains constant with the season prior to that, so it will be interesting to see whether this increases further still this year. Guns continue to book their shooting mainly by word of mouth, however, the use of the internet is now by far the most popular alternative method.



£33.18

COST PER BIRD EX VAT

£33.49

38% OF GUNS THIS SEASON ARE GOING TO SPEND MORE

AVERAGE SPEND **£5,533**

SIMILAR TO THE PREVIOUS YEAR **(£5,691)**

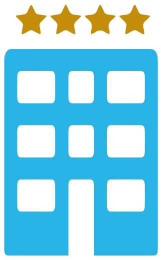
WHEN BOOKING A SHOOT

76% WORD OF MOUTH

17% INTERNET

HOW FAR DO PEOPLE TRAVEL?

The number of shoots visited per gun each season continues to grow steadily. The increase to nearly six shoots from last season's five demonstrates that mobility and choice are fundamental issues for both shoots and guns to consider. Guns are expecting a minimum standard of service from comparative shoots and shoots must expect a churn of customers every year. The distance to travel to shoots is not an issue to the majority of guns, with 64.8% prepared to travel over 100 miles when paying for a shoot. The distance of travel results in a considerable number of hotel stays during the season, with the average gun spending nearly three nights in paid-for accommodation each season.



2.65
NIGHTS PER SEASON IN PAID ACCOMMODATION

DIFFERENT SHOOTS VISITED PER SEASON

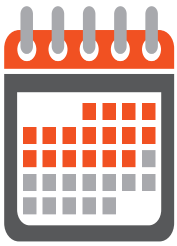
64.8%
PREPARED TO TRAVEL
100 MILES WHEN PAYING FOR A SHOOT

WHERE, WHAT AND WHEN DO PEOPLE SHOOT?

The most popular areas to shoot continue to be in the South West, Scotland and the South East. In line with the increased availability of grouse last season, we saw an increase in the number of guns shooting grouse of 2% to 23%. The number of partridges making up the bags continues to grow, with 82% of all shoots now showing partridge. The average number of days shot per season was 16.75, with over 10% of guns shooting overseas last season.

Generally, guns have no preference on which day of the week they shoot (51%). For those that do have a preference, 42.6% prefer to shoot on Saturday with the next most popular day being Friday (15.2%).

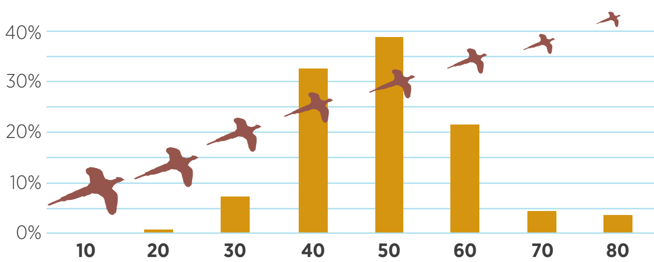
57% of guns like high bird shooting, and 63% of guns regard a high bird as 50 yards plus, but when guns were asked to guess the distance of an object, 76% of people were outside +/- 5 yards and 1 in 10 thought the distance was twice as far as it actually was. This suggests that a gun's ability to measure the height of a bird to be fairly unreliable!



17 DAYS SHOOTING PER SEASON

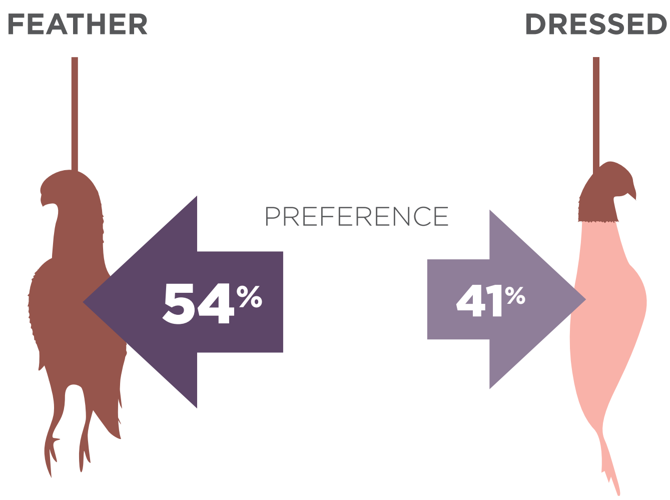
OF GUNS SHOOT ABROAD

HOW HIGH DO GUNS THINK IS A HIGH BIRD? (YARDS)

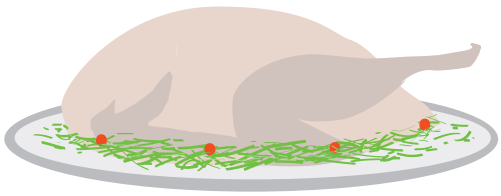


RECOVERY RATES AND THE CONSUMPTION OF GAME

Last season, the recovery rate from birds put down was unusually high at 44%. In 2013-14 it was 39.5%, and in 2012-13 it was 40.4%, which suggests the very good return across the country was due to the weather. The increased return will have made a significant contribution to the profitability of shoots. Perhaps unsurprisingly, the vast majority of guns do know how to prepare a pheasant or partridge for cooking- only 4% do not. Shoots continue to offer birds on the feather or dressed to guns at the end of a day's shooting and 54% of guns prefer to receive their birds on the feather.



95.4% CAN PREPARE A GAME BIRD



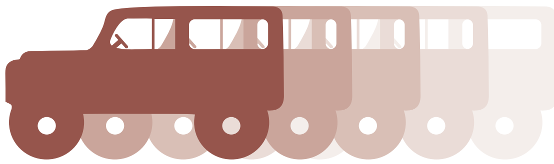
77% TO OVEN READY

WHAT DO GUNS EXPECT AT A SHOOT?

The overwhelming response to the question of what a gun perceives to be the most important feature of a shoot day is "having fun with friends". It is twice as important as both the quality of hospitality and the host, but the host was seen to be more important than the quality of hospitality, demonstrating that shoots must not underestimate the importance of shooting as a social occasion. As expected, the quality of birds is the second most important feature to the guns.

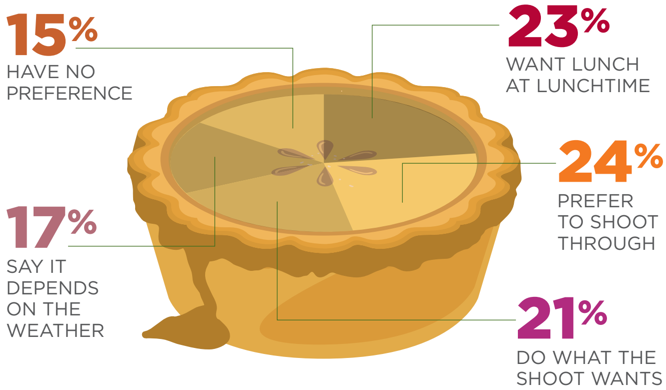
With the average gun visiting an ever larger number of shoots per season, it is increasingly apparent that shoots must ensure that they meet the guns expectations on the standards of hospitality and service. For example, the clarity on meal times and agreeing in advance a team's preferences are varied.

Shoots offer a variety of methods of travel, from a gun bus to trailer, however nearly 50% of guns prefer to travel around a shoot in a 4x4 and this figure has remained constant in the last three years.



48% OF GUNS PREFER TO TRAVEL AROUND A SHOOT IN A 4X4

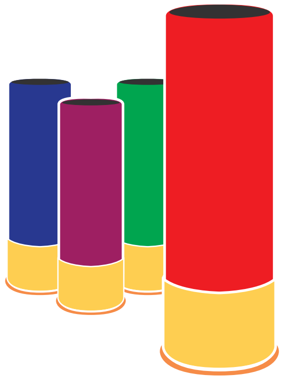
WHEN DO GUNS PREFER TO EAT ON A SHOOT DAY?



WHAT CARTRIDGES SHOULD BE USED?

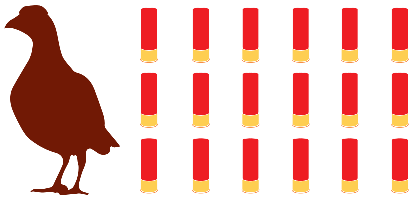
Over 80% of guns have consistently stated that they prefer to use fibre wad cartridges in the last three surveys. Shoots have continued to lag behind with only 63% of shoots stipulating that guns use fibre wads. 39% of guns stated that they are loyal to one brand of cartridge - an interesting message to the manufacturers. In addition, an increasing number of guns (43% this year) say that shoots should provide advice on which cartridge type to use. 39% of shoots advise guns on the expected bird / cartridge ratio, which provides guns with useful guidance on the number of cartridges required. Over 50% of shoots can provide guns with cartridges.

39% OF GUNS ARE LOYAL TO ONE BRAND OF CARTRIDGE

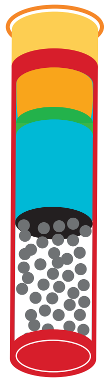


44% OF GUNS THINK SHOOTS SHOULD GIVE

39% OF SHOOTS ADVISE ON BIRD CARTRIDGE RATIO



82% USE FIBRE WADDINGS



DO GUNS PRACTICE, AND WHAT DO THEY OWN?

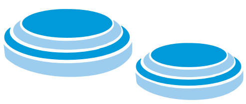
There has been a trend over the last three years indicating that guns are taking more lessons, which is encouraging for shooting schools. The average number of lessons per gun is now at 1.52 per annum.

The rapid expansion of simulated shooting over the last six years continues unabated. The average number of simulated game days per year is now 1.92 (rising from 1.7 last year). This sport not only extends the season for many estates, but also offers the opportunity for practice. It is not unusual to use more than 500 cartridges per gun.

Gun ownership remains constant: 3.73 is the average number of shotguns owned, with an average value of £4,425.

40.5% of guns own a rifle and the average number owned is 2.91, up from 2.71 last year. The average value of a rifle is £1,775.

AVERAGE OF **1.92** SIMULATED GAME DAYS PER ANNUM COMPARED WITH **1.78** LAST YEAR



3.73 AVERAGE SHOTGUNS OWNED

THE AVERAGE VALUE IS **£4,425**

AVERAGE OF **1.5** LESSONS PER ANNUM

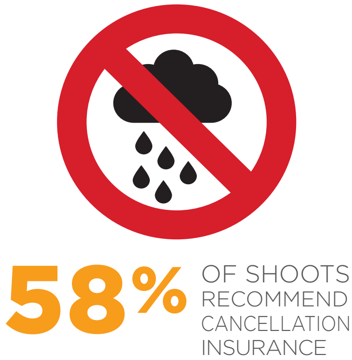
COMPARED WITH **1.39** LAST YEAR

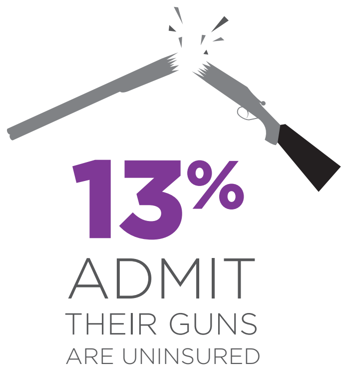
DO GUNS TAKE OUT INSURANCE?

We continue to be surprised by the number of guns that admit they don't take any insurance. This year it is 13% which, encouragingly, is down from 19% last year. With 83% of shoots stating that guns must take out Public Liability Insurance, the emphasis is increasing. However, only 53% of shoots actually ask guns for proof. With nearly all insurers providing cards for insurance by the day, it is surprising, given the importance of insurance, that this percentage is not higher.

11.9% take out shoot cancellation insurance, up from 11.2% last year, yet 58% of shoots recommend it, up from 39% last year. This increase of nearly 20% demonstrates that shoots are increasingly sensitive to the costs of a cancelled gun or day. Whilst only 7% of guns incurred a financial loss last year on a shoot, 16% of shoots would not return the money if a day is cancelled.

13% of guns admit that they do not insure their guns. Given the availability of shooting insurance packages, this is surprising. 52% of shoots provide a game card with safety instructions (up from 41% last year) which not only indicates an increased concern about safety, but also that shoots are seeing a wider variety of guns.



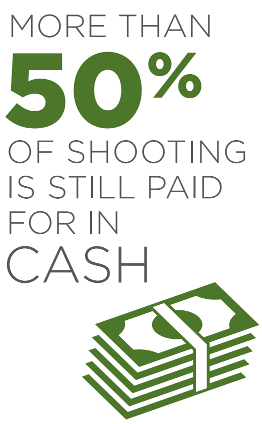


PAPERWORK AND OVERAGE

Shooting, for many years, has been conducted on the basis of a handshake and phone call. As shoots deal with an ever wider selection of guns, the need for more official documentation grows. However, just over 60% of guns say that they don't ever receive a contract. Last year this was 65% and the previous year 70%, thus indicating that attitudes are gradually changing for the better. This statistic is challenged, however, as 47% of shoots surveyed claim to send out a contract (up from 39% last year).

With regard to deposits for shooting, 65% of shoots require a 50% deposit on booking, but 10% of shoots require no deposit (this is down from 27% last year). Over 50% of shooting is still paid for in cash.

Overage policies have been adjusting over the last five years and 24.5% of guns state that they never wish to pay overage, whilst 52% of shoots never charge overage. Interestingly, 24% of shoots charge less per bird for overage.



THE DETAIL BEHIND THE HEADLINES

Additional statistics from our census, further details available on request.

GUN SURVEY

GUN FACTS

95% of guns surveyed were male

65% were over 46 years old

50% use Facebook (up from **41%** last year)

33% shoot in Scotland

Average number of days shot per year= **17**

Number of days purchased per year = **8** (down from **10** last year)

Average bag size = **118** (previous season **124,** 2013 season **131**)

Average amount spent per day, per gun = **£502** (last year **£619**)

57% like high bird shoots, **63%** of guns regard a high bird as 50 yards plus

69% own a 4x4

28% prefer to travel round the shoot in a gun bus

61% are not loyal to a certain cartridge brand

21% are happy to pay **£200+** on a hotel

41% of people like to know the overage policy in advance

66% insure guns through their home insurance

60% of guns don't ever receive a contract. Last year this was **65%** and the previous year **70%**

7% of guns have incurred a financial loss from shooting, and **16%** of shoots would not return money if the day is cancelled

11.9% take out shoot cancellation insurance (up from **11.2%** last year) yet **58%** of shoots recommend it (up from **39%** last year)

55% own a gun dog

99% eat the game that they shoot

51% of guns have no preference on what day of the week they shoot. If they do have a preference, **42.6%** prefer Saturday

63% state that having a good day out with friends is most important to them on a shoot day, followed by quality of birds at **29%**, and quality of host and hospitality at **4%**

40.5% of guns own a rifle. The average number owned is **2.91** (up from **2.71** last year). The average value is **£1,775**

38% of people purchase new clothes for shooting once a year or more

SHOOT OWNER SURVEY

SHOOT PROFILE

22% of shoots are in the South West and **13%** in East Anglia

72% of shoots consider themselves to be a high bird shoot, at least on some drives

45% describe their shoots as rolling land, **40%** as wooded valleys

The average acreage is **2,533**

59% usually offer 4x4s as their shoot transport

63% of shoots stipulate the type of cartridges that should be used (down from **68%** last year)

67% ask pickers-up to take extra due care and attention around the pegs where guns have dogs

32.6% offer dressed birds at the end of the day

61% do not advise on cartridge to bird ratios

52% don't charge overage (last year **54%**)

59% of shoots are owned vs **41%** are leased (same as last year)

24% of shoots charge less per bird for overage

51.7% only sell full days, the remainder sell a mixture

21% of shoots consider themselves to be commercial, **34%** part commercial and **45%** are private

54% have a syndicate (down from **61%** last year)

50% have wildfowl (down from **63%** last year) and **42%** have deer (up from **34%** last year). Less than **40%** shoot ground game

31% of land owners only do ELS and HLS because they have a shoot

35% of shoots advise how much to tip the keeper

Stock type	Percentage
Day olds/Reared	24
Poults	74
Ex layers	7
Wild birds only	8

Average price	Per poult	Day old
Partridge	£4.04 (same as last year)	£1.06 (up from £0.98 last year)
Pheasant	£3.55 (same as last year)	£0.93 (up from £0.78 last year)

PURCHASING

Payment methods offered: **93%** cheque, **50%** cash (down from 61%), **80%** bank transfer, **19%** debit/credit card

66% of shoots require a **50%** deposit, **10%** take no deposit (down from **27%** last year)

65% of shoots require a **50%** deposit on booking

18.6% of shoots are now registered as Sporting Clubs

48% of shoots provide a contract, yet **60%** of guns say they have never received one (down from **70%** last year)

49% of shoots do not charge VAT, either because they are a club, under the threshold or for other reasons such as a syndicate

INSURANCE

58% of shoots recommend guns take out cancellation insurance (up from **38%** last year), yet only **12%** of guns do!

52% of shoots offer another day for free in the event of a cancellation (**20%** do not)

52% of shoots provide a Game card with safety instructions (up from **41%** last year)

HOSPITALITY

64% of shoots offer refreshments on arrival, **48%** offer a three course meal at lunchtime and **23%** of guns like to stop for lunch

21% offer champagne to their guns

83% of shoots are live on the peg (up from **75%**). **17%** start with a horn/whistle

44% of shoots always stop for lunch, **17%** give guns the choice

CARTRIDGES AND OVERAGE

63% stipulate fibre wadding (down from **68%** last year)

23% of shoots advise on cartridges, but **43%** would like advice
Over **50%** of shoots can provide cartridges to guns

29% of shoots charge **+/- 5%** or **+/- 10%** overage

80% of shoots do not have an underage policy (up from **72%** last year)

Shoot owner facts

Over **97%** show pheasant and **82%** show partridge

Average number of birds put down was 6,840
Average returns: 44%

	Average pay				Average used
	2015	2014	2013	2012	
Pickers-up	£32.58	£31.61	£28.25	(£29)	4.58
Beaters	£28.49	£28.68	£23.79	(£25)	11.46

STAFF BENEFITS

There has been a reduction across the board in staff benefits apart from a significant rise in the number of shoots offering a pension. There was a small rise in mobile phones and keepers' days as a benefit

63% employ a Gamekeeper, who on average is paid **£20,209**

SOURCE OF NEW CLIENTS

1st Word of mouth **76%** | Internet **17%**
2nd Internet **46%** | Sporting Agents **31%** | Word of mouth **17%**

ROD AND FISHERY PROFILE

SCOTLAND'S DECLINE?

Scotland is still the most sought after destination for fishing in the UK, but is showing the biggest decline at 8.3%. The North East was the only place to show a meaningful increase in anglers this year of 16.15%. The River Tyne has become more popular due to competitive pricing and better accessibility from the South of England. The region also posted strong catch data this season. We believe that this is undoubtedly due to the owners realising that they have an important asset which can generate income for them. This is primarily due to effective management of the river, and shows what can be achieved by a cohesive and decisive management plan and support from the relevant river trust.

8.3%
DECLINE IN ANGLERS

16.2%
INCREASE IN ANGLERS

FISH FOR YOUR FUNDS!

We believe that there is still value fishing to be found in the UK but the market continues to promote the major and / or prestigious rivers, and the rivers which lack the cache of the high cost rivers can often be ignored. For example, some of the beats on the rivers in the South West of Scotland catch 200+ fish but at a maximum cost of around £50 per rod/day. More needs to be done by agents, rivers and beats on those rivers to promote themselves, and shake off the belief that people do not want to fish them. After all, if people don't know, people won't come...

SPEND IN THE UK HAS FALLEN BY
15%
IN THE LAST YEAR

66%
OF EACH ROD'S AVERAGE SPEND IS IN THE UNITED KINGDOM

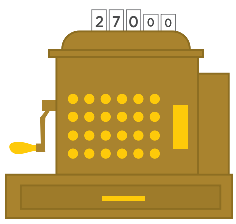
THE PULL FROM ABROAD

Unfortunately, as nothing thus far has been done to stem commercial netting of salmon in our seas, there continues to be a problem. Value for money is luring fisherman abroad, and large catches are encouraging rods to pay a premium. However, will this last? We currently have a strong pound and overseas outfits have realised that UK anglers are prepared to travel.

We believe that the biggest opportunity to start to bring some of the international travellers back is through protecting our salmon, and as a result making our water systems more lucrative.

31%
OF RODS NOW FISH ABROAD

RODS ARE PREPARED TO PAY
63%
MORE FOR A DAY'S FISHING ABROAD
(£270 COMPARED TO £165.50)



THE IMPACT OF WEATHER?

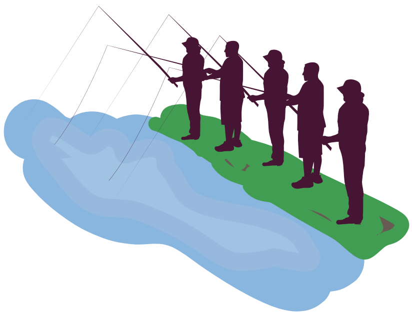
Fishermen have been dissuaded from travelling to catch salmon this season because of catch numbers and river conditions. Since then, the weather has not been good for salmon and although a number of rivers have had good years across the board, we believe that the weather and resulting lack of fish caught runs completely parallel to the decrease in people heading out to enjoy the sport.

13.3%

DECREASE IN THE NUMBER OF DAYS FISHING PER YEAR

FISHING SYNDICATES

There are many syndicates which offer stunningly good value, but we believe the beats and owners concerned could better promote this fishing. This is also coupled with the fact that the average angler is often unable to commit to taking the same day off every week.



16%

OF RODS ARE PART OF A SYNDICATE

THE IMPORTANCE OF CATCH AND RELEASE

More fisheries have a catch and release policy than last year, which fits in line with the awareness of the decline in Atlantic salmon.

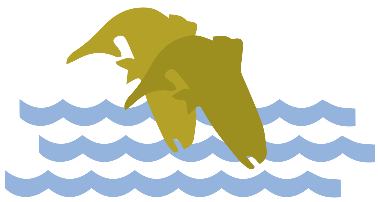
We believe this is key for the success of British rivers and the Atlantic salmon's future. It would be fair to say that only a tiny percentage of salmon are now killed by anglers but this is still a major issue. We fear there are still those out there who will not fish in Scotland until after the mandatory catch and release period finishes on 31 March. We are now aware of a number of beats who enforce catch and release until the end of May, though there is little we can do if someone does kill a salmon, except refuse any future bookings. Every salmon taken reduces the gene pool and we estimate that a dead hen fish of 10lbs in weight is equivalent of removing 100k eggs from the system. The fact that for every 100k eggs fertilised only 1.6 fish make it back to the river is a testament to how important it is to maximise the resource, not just for now, but for generations to come.

We have seen fishing decrease over the past few years due to dwindling numbers of salmon being caught. The occasional 'bumper year' does not and should not be seen as a great indicator when the medium term trend is downwards. The long term trend will be a continual decline if we don't start to do something about protecting our Atlantic salmon.

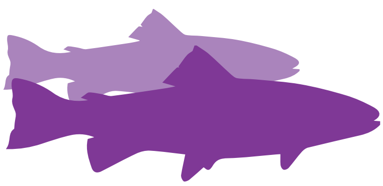
92% OF FISHERIES HAVE A CATCH AND RELEASE POLICY, UP FROM **86%** LAST YEAR

POLICIES INCLUDE:

PER ADVICE OF LOCAL AUTHORITY



FULL CATCH AND RELEASE



MUST RELEASE ALL LARGER FISH OVER 7LBS

THE DEMISE OF WEEK LETS

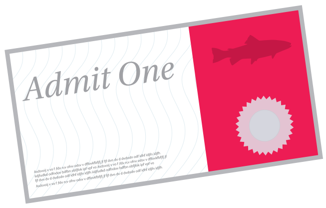
There has been a significant increase in fisheries selling full days as opposed to week lets or season tickets. Could this be because people do not want to commit to a full week, given the poor last few years? Or is it to do with the fact that those who previously took full weeks are getting older, and the younger members of those families may prefer to do something with the valuable vacation time rather than fish?

Either way, the era of fisheries relying on week lets is fast declining and all for the better in our opinion. This allows the average angler to get access to fishing that for far too long has been the preserve of the rich, self-employed or retired.

As day lets have increased, we have far more fisheries that are prepared to keep and display catch data. Not only this, there is a large increase in the number of fisheries supplying or selling tackle and/or flies. We believe these are due to the increase in travelling rods and day lets being offered, and the resulting customer service that is required within an increasingly competitive environment.

50% SELL WEEK LETS DOWN FROM **62%**

85% NOW SELL FULL DAYS, UP FROM **62%**



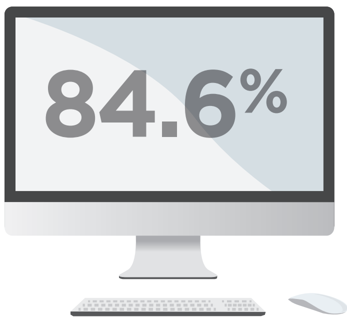
SEASON TICKETS DOWN TO **27%** FROM **44%**

ADVANCEMENTS IN TECHNOLOGY

Although there has been a small increase in the use of agents, 84.6% of fisheries either do, or would consider offering their availability online. Given that online booking is not highly prevalent in the fishing world, this shows a desire for more fisheries to operate independently.

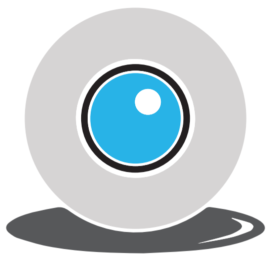
There is a very large increase in the number of fisheries that do not offer the ability to check Water Levels/Catch Reports online. Could this be linked to the poor weather conditions and season as a result this year? Or could it be that the majority do not have the time to do this in a meaningful manner?

Of the 86% that do not have webcams on their water, 61% would consider using them, which is very interesting. This demonstrates that technology is even affecting the wildest of sports. Many fisheries have been concerned about showing the river height to prospective rods, so as not to put them off in non-perfect conditions but this is clearly changing. There is a strong argument that not having the river data lends a touch of mystique to the booking and the anticipation of a catch - should this be part of the booking process or not?



OF FISHERIES EITHER DO OR WOULD CONSIDER OFFERING THEIR AVAILABILITY ONLINE

OF THE 86% WHO DO NOT HAVE WEBCAMS ON THEIR WATER **61%** WOULD CONSIDER USING THEM



THE DETAIL BEHIND THE HEADLINES

Additional statistics from our census, further details available on request.

FISHING SURVEY

FISHERY OWNER FACTS

54% of all fisheries surveyed were in Scotland

73% of all fisheries were owned, rather than leased

25% stocked their fishery and **71%** stocked with sterile fish

The average number of beats is three, and **44%** are double banked

Average length of beat is three miles, with an average of **20** pools

26% had water levels affected in the last **10** years

63% employ staff, with **93%** of those employing a Ghillie or Beat-keeper

50% of fishery owners offer a house and **75%** offer a vehicle

If a rod fails to attend, **73%** would not return the money

If a day is cancelled due to bad weather, **34%** would not reschedule the day

77% of fisheries do not require rods to have any form of insurance

67% work with National or Local River Trusts

60% have a catch limit, and **92%** have a catch a release policy

PROFILE

22% class their fishing as commercial, with **42%** part commercial and **36%** private

Brown trout, salmon and sea trout are the most commonly caught species

79% surveyed had salmon rivers with only **12%** owning lakes/lochs

82% offer salmon fishing

73% offer sea trout fishing

12% offer rainbow trout

33% of fisheries had an abstraction licence on their beat

PURCHASING

85% of fisheries now sell full days, up from **62%** last year

50% sell week lets, down from **62%**

Season tickets down to **27%** from **44%**

80% of bookings are made through email or telephone

27% of owners require a **50%** deposit, and **77%** require this deposit when making the booking

58% provide a contract in advance. An increase of **35%** over the last year

HOSPITALITY

84% offer no form of hospitality

60% provide access to scales

96% keep and display catch data - an increase from **73%** last year

52% supply tackle and flies

40% offer accommodation on the estate, **68%** do not have any arrangements with local hotels

Only **6%** sell any dressed fish

8% offer boats, down from **20%** last year

87% do not have webcams on their water, yet **62%** would consider using them

88% allow dogs on their fishery

ROD FACTS

48% regularly go salmon fishing

The average number of days fishing per annum is **18** (down from **21** last year)

49% pay by cash

£1,506 is the average annual spend per rod

61% of respondents believe that fishing remains good value in the UK

Annual spend this year- **£1,505**, Expected annual spend next year - **£1,652** (**9.73%** increase)

16% are part of a static syndicate

72% go fly fishing most often

Number of rivers visited per year = **2.2** (down from **6** last year)

Decrease in the number of days fishing per year by **13.3%** to **18.52** from **21.38**

SO WHAT DOES THE CENSUS TELL US?

This census enables the driven game shooting and game fishing communities to understand the dynamics of their market, and establishes some trends as we build upon the last three years of data. We believe this is an invaluable tool for all operators, and we hope that you find many of these statistics relevant to your business.

WHAT ARE THE MAIN FEATURES?

Whilst both sports are mainly participated IN by men, we continue to see growth in the number of ladies taking part in every level and this is set against a mighty 38% of respondents saying that they are spending more for this shooting season. After the uncertain years of the recession we now see confidence fully restored and the driven game shooting business is growing at every level. This confidence, however, is not reflected in game fishing where there is a definite air of pessimism. Whilst Scotland is still the destination of choice, there has been a decline of 8.3% in respondents choosing to fish there. This may in part be due to a combination of (i) the poor seasons experienced on most rivers in the past couple of years (ii) the perceived value for money, and (iii) uncertainty over the direction taken by the Scottish Government regarding the Wild Fisheries Review.

With social media playing an ever increasing role in our daily lives, shooting has now almost caught up with the national averages. For example, over 50% of guns use Facebook and the popularity of LinkedIn and YouTube is growing steadily. The increased use of websites, and GunsOnPegs now having over 76,000 members, demonstrates that the digital age has led to a step change in how shooting is booked, compared with 10 years ago. The fishing census shows that although there has been a small increase in the use of agents, 84.6% of fisheries either do, or would consider offering their availability online. Given that online booking is not highly prevalent in the fishing world, this shows a desire for more fisheries to operate independently with their own booking system.

The manner in which shooting is booked and the increasing number of shoots visited each season highlights the change shooting and fishing operators face. An average gun now visits six different shoots per season as against the five recorded last year. This has climbed steadily each year for the last five years. The ever larger variety of shoots visited by guns means that a common level of service is expected on a shoot day and gone are the days when the same guns go back to the same shoot year after year. The number of fisheries visited by anglers has declined from 22 last season, to 18 this season due, in part, to the reasons stated earlier. Also, the number of fisheries offering only week lets is decreasing as they now realise that due to, inter alia, work and family commitments, the modern day angler is only prepared to take single day lets, but the total number of days taken in this manner far exceeds the number of days offered in weekly lets. This trend is also driven by the need to achieve value for money from fishing, where anglers are now able to get day lets on scores of different rivers depending on conditions.

A new area we have tracked this year is the number of shooting visitors from abroad, and over 6% of survey respondents are based outside the UK. The use of the internet to construct shooting packages is now commonplace and there is growing evidence of foreign-based guns booking shooting at multiple shoots for week long periods or more. Conversely, there is a marked increase in the number of anglers seeking out foreign trips and there are a myriad to choose from, some aimed at the budget conscious angler and others at the more comfort-seeking angler. All however offer the chance to fish in a different part of the world with a great expectation of catching fish.

With the increased confidence of participants we have also seen an increase in prices. The cost per bird for pheasant and partridge is £33.49 and £33.18 (ex VAT) respectively, which is an increase of 5% for a pheasant and 11% for a partridge over the previous season. In our first survey in 2009/10 the average price per pheasant was less than £30 and a partridge £28, so price rises have exceeded RPI. Where shoots are charging VAT, £40 per bird is the normal price, which explains an increase in the use of clubs and the rise of Sports Mutual. This price increase is despite shoots recording a 44% recovery rate last year. For the previous three years this has varied between 38-40% and this demonstrates how good a rearing season we had in 2014, and the magnificent grouse season also reflected this. Due to the poor weather in early 2015 and with an enormous number of cancelled grouse days we expect the recovery rate to return to nearer 38% for this season. Angling is again at odds with this trend. Whilst prices have increased on several rivers, more anglers appear to be prepared to look around at different rivers to find value, so the days of dominance of the big rivers is waning. There are rivers which offer significant annual catches, but at a fraction of the costs of comparable beats on the bigger rivers. We believe that whilst there will always be those wishing to fish the famous rivers and beats, those rivers and beats will at some point start to look to reduce prices.

Visiting an average of six shoots a year naturally involves travel, and the vast majority of guns continue to be quite happy to journey more than 100 miles to a shoot. The number of hotel stays reflects this aspect, and it provides strong evidence that shooting and fishing are important contributors to the rural economy. It is not only national travel that occurs during the season, as over 10% of respondents shoot outside the UK at some point during the season.

We are intrigued by the recent decline in the number of people being part of roving syndicates, and there is evidence to suggest that guns are finding it increasingly difficult to make up a full team. Whilst the average gun might shoot 17 days per season, an increasing number of shoots in recent years make up days from small groups of individuals. About half of guns have no preference on the day of the week they shoot, but for those that do have a preference, 42% prefer to shoot on a Saturday. The fishing census shows that there are numerous fisheries offering syndicate rods but the census has demonstrated that only a small percentage of anglers participate in a syndicate. This may be in part again due to pressures of work and the inability to take the same day off each week, however, we firmly believe that those fisheries offering syndicates could do more to promote and market themselves.

The census firmly establishes that the most important feature of a shoot day was "having fun with friends". Shooting on a weekend is an obvious outcome from this finding, but the social enjoyment of a day's shooting far outweighed in importance both the quality of the hospitality and the host. There is, however, a potential disconnect concerning mealtimes as some shoots can be quite determined to shoot through and eat after the shoot. 23% of those surveyed like to eat at lunch time, so shoot owners would be wise to check with teams of guns prior to the day what they prefer.

It is vital for the future of shooting that we consume what we shoot and we were delighted that over 95% of guns confirmed that they can prepare a bird for the table. Interestingly, we have seen a slight increase in the number of guns preferring game on the feather rather than oven-ready. This is consistent with the previous year's findings that guns are becoming more adventurous in their preparation of the meat from their quarry. There is an obvious disconnect here with angling, especially salmon and sea trout angling where the importance of catch and release is slowly beginning to be adopted. More fisheries have a catch and release policy than last year, which fits in line with the awareness of the decline in Atlantic salmon.

The issue of insurance continues to be worthy of comment, as whilst the number that admit to shooting uninsured (13%) is down from 19% last year, shoot owners continue to state they almost universally expect guns to be insured, but only 53% of shoots actually check by asking for proof. With nearly all insurance providers offering either a card or official documentation it continues to surprise us that nearly half of all shoots don't bother. Some shoots now issue insurance on the day using the insurance pads provided by the joint initiative from GunsOnPegs and BASC. 58% of shoots now stipulate that guns should take out shoot cancellation insurance, and this has risen from 39% last year, demonstrating that shoots are increasingly sensitive towards the loss from a cancelled day. This is not matched by the number of guns buying insurances such as Triple Barrelled Cover, as only 11% of those surveyed do so. It will be interesting to see what happens if we have a hard winter!

The growing confidence is further demonstrated by the provision of contracts and the financial transactions. For the last three years there has been a 5% increase year-on-year with now 40% of guns stating a contract is provided that details the terms and conditions. Nevertheless this is still a remarkably low figure given the amount of money involved in the purchasing of shooting. Perhaps this explains why for the fourth year in a row over 50% of guns have stated they pay for shooting in cash. Taking a 50% deposit is now commonplace; with 65% of shoots now doing so, and 21% of shoots ask for this six months in advance of the shoot. The fishing census mirrors the shooting findings, with 77% of fisheries and agents requiring a deposit upon booking and 58% offeringk contracts (up 35% from last season) reflecting the importance of securing these bookings.

The shooting season has been extended for many by the continued rise in the amount of simulated game shooting available. Over the last six years, we have seen a constant increase in the number of operators, and the average number of days attended is now nearly two per year. This is also matched by the average number of lessons taken per year now at 1.52. Three years ago 66% claimed never to have a lesson!

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