

ADMG Stalking Benchmark Survey Analysis 2011 – Final Report

In association with The Scottish Country Sports Tourism Group



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Executive Summary

The aim of the first Stalking Benchmarking Survey for Scotland is to provide figures that will assist individual estates and deer forests determine what they could be charging for their let stalking.

An interim report was published in our previous newsletter. This report provides the final analysis.

Headlines

76 estates took part in the survey covering a total area in the region of 550,000 hectares (1,360,000 acres)

Stags

- The charge per stag/beat/day ranges from £240 - £600 (inc VAT).
- Estates providing stalker and ghillie charge an average £487 (inc VAT) per day
- Estates providing a stalker but no ghillie charge an average £444 (inc VAT)
- 42 per cent of respondents let by the stag only. 23 per cent let by the week
- The numbers of stags shot per respondent ranges from 5 – 310 giving an average of 46 stags let per estate per year.
- Half of respondents (50 per cent) recover stag carcasses by ATV. More recover carcasses by quad bike (12 per cent) than by pony (4 per cent). 32 per cent use a mix of methods to recover stag carcasses.

Hinds

- The charge per hind/beat/day ranges from £50 - £360 (inc VAT), or an average charge of £186 (inc VAT).
- Estates providing a stalker and ghillie (30 per cent) charge on average £204 (inc VAT).
- Estates providing a stalker only (64 per cent) charge on average £180 (inc VAT).
- The largest proportion (48 per cent) recover hind carcasses by ATV. 10 per cent use quad bike. Less than 2 per cent use a pony. 41 per cent use a mix of methods.

Accommodation

55 per cent of respondents let their stalking exclusive of accommodation.

Reimbursement for a blank day

67 per cent of respondents do not reimburse clients for an unsuccessful day.

Marketing

Repeat business is the most used method for letting stag stalking (89 per cent) with word of mouth rated second at 76 per cent.

Repeat business accounts for 81 per cent of let hinds with word of mouth accounting for 74 per cent in order of importance.

Provenance of guests

For stags, 42 per cent cite the 'rest of the UK' (ie not Scotland) as most important. 25 per cent rank Scotland as most important; 22 per cent rank Europe as most important, with 11 per cent for the 'rest of the world'.

For hinds, 'rest of the UK' ranks first at 44 per cent, followed by Scotland at 42 per cent, and Europe at 14 per cent. 'Rest of the world' fails to score.

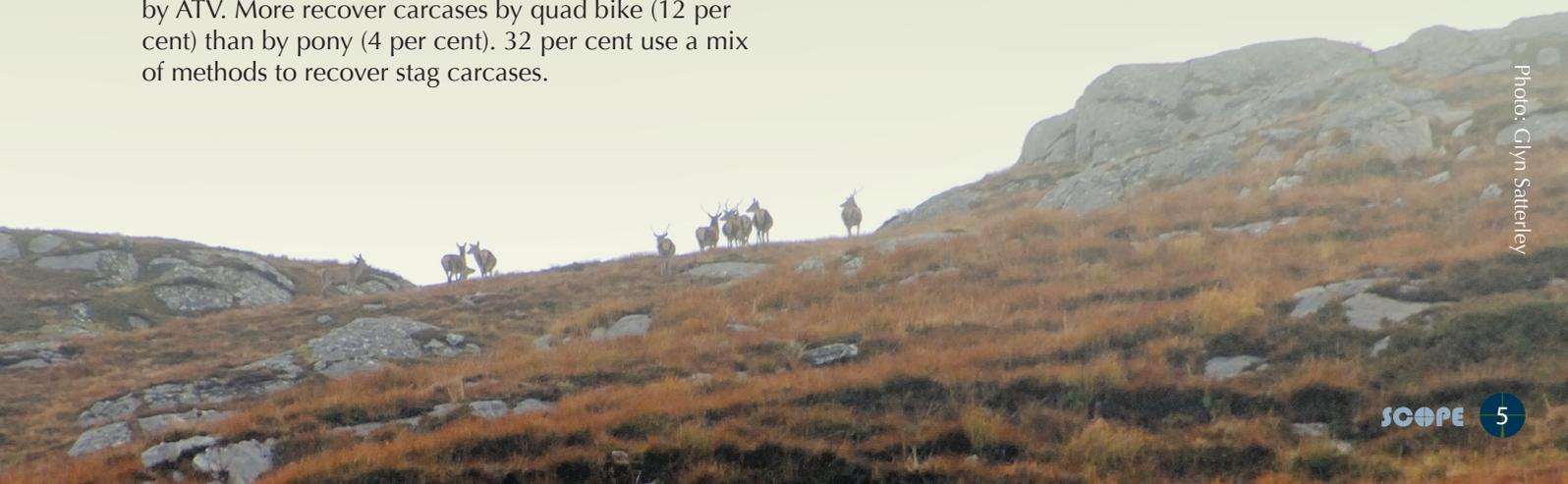


Photo: Glyn Satterley

Stalking Benchmark Survey Analysis 2011 - final report

The first Stalking Benchmark Survey provides figures that may help individual estates and deer forests determine what they should be charging for stalking by providing an analysis of what market rates currently are.

The survey covers red deer stags and hinds only.

This survey has been undertaken by ADMG in association with The Scottish Country Sports Tourism Group, and has been generously sponsored by Bidwells and Saffery Champness.

A total of 76 estates completed and returned the questionnaire, and their responses form the basis of this report. Some estates only let stags, some only let hinds, and some let stags and hinds. Not all respondents answered all of the questions. From the returns submitted the following data has been drawn.

1) How many sporting stags do you let per year?

Numbers ranged from 5 to 310, an average of 46 stags let per estate per year. 59% let between 20 and 50 stags per year, with only 6 estates letting more than 100 stags, and 15 estates letting less than 20 per year.

2) Do you let by the stag, day, week or other?

28 let by stag only (42%)
5 let by day only (8%)
15 let by week only (23%)
Rest let by combination of stags/week/day/other

3) How many hinds do you let per year?

Numbers ranged from 3 to 160, making an average of 37 hinds let per estate year. 18 estates let less than 20 hinds per year (33%), 14 estates let more than 50 hinds per year (26%), and 5 estates let more than 100 per year (9%).

4) Do you let by the hind, day, week or other?

4 let by the hind only (7.5%)
35 let by the day only (66%)
Rest let by a combination of all or 'other' (eg by the rifle).

5) How many days do you let stags in total?

Less than half of respondents let stags for more than 30 days. 54% of respondents let stags for less than 30 days, with the minimum given as 3 days. Only 6 respondents let stags for more than 100 days. These include some large estates with up to 5 beats.

6) How many days do you let hinds?

The range was between 3 and 50 days, making an average of 17 days. 61% of estates let hinds for less than 20 days.

7) Do you charge extra for a trophy?

A small number of respondents indicated that they do charge for a trophy, but the sample is too small to merit inclusion.

8) How many let stags do you expect to shoot per day?

Respondents expected to shoot between 1 and 4 stags per day, with 58% shooting only 1 stag per day, and only one estate shooting up to 4 (over more than 1 beat).

9) How many hinds do you expect to shoot per day?

All who gave a response to this question said roughly between 1 and 5 (plus calves).

10) What do you charge per stag/day and how do you present stag stalking?

A number of different permutations were given by respondents. The following shows the average charge per stag/beat/day.

Charges per beat/day range from £240 to £600 (inc VAT) per stag.

20 estates mostly use one stalker and charge between £300 to £525 (inc VAT) per day, an average of £444 (inc VAT).

33 estates mainly use stalker plus ghillie, and charge from £240 to £600 (inc VAT) - average £487 (inc VAT).

11 estates use stalker plus two ghillies and charge £400 - £500 (inc VAT).

11) How do you recover your stag carcasses mainly?

34 by ATV only (50%)
3 by pony only (4%)
8 by quad bike only (12%)
1 by dragging (1%)
22 by mix of above (32%)

12) How do you present hind stalking and what do you charge?

The overall charges range between £50 and £360 (inc VAT) per beat/day, an average of £186 (inc VAT).

37 estates (64%) use one stalker only, and charge from £50 to £360 (inc VAT) - average £180 (inc VAT).

30% use a stalker plus ghillie and charge £150 to £360 (inc VAT) - average £204 (inc VAT).

13) How do you recover hind carcasses mainly?

28 by ATV only (48%)
6 by quad bike only (10%)
1 by pony only (1%)
24 by mix of above (41%)

14) Do you let stalking inclusive of accommodation?

36 estates do not include accommodation (55%)
30 estates include accommodation (45%)

Some estates let packages for groups.

15) Do you reimburse clients for an unsuccessful stalk?

42 do not reimburse (67%)
20 do reimburse (between 30% and 100% of the charge)

Some said it depended on the circumstances (eg weather).
Some offer another day as reimbursement.

16) When does your stag season start and end?

The opening day, 1 July, is the earliest given start with most estates finishing on 20 October.

11 estates start sometime in July (17%)
28 start in August (42%)
22 in September (33%)
5 in October (8%)

17) When does your hind stalking start and end?

Earliest start is 21 October and latest finish is 15 February.
Most estates start in late October or early November. A couple only do a short season (a week or a month).

17 estates finish in December (30%)
13 finish in January (22%)
24 finish in February (42%)
3 finish before December (5%)

18a) How do you market your stag stalking?

Estates were invited to choose as many of the 6 options that were relevant.

Out of 66 estates:
59 said 'repeat business' (89%)
50 said 'word of mouth' (76%)
23 said 'advertising/websites' (35%)
29 said 'agents' (44%)
7 said 'Scottish Country Sports Tourism Group' (11%)
6 said 'ADMG stalking to let' (9%)

18b) How do you market your hind stalking?

Out of 54 estates:
44 said 'repeat business' (81%)
40 said 'word of mouth' (74%)
13 said 'advertising/websites' (24%)
6 said 'Scottish Country Sports Tourism Group' (11%)
2 said 'ADMG stalking to let' (less than 4%)

19) Where do your sporting guests come from?

Stags (out of 64 estates who answered this question)
27 estates ranked the 'rest of UK' first (42%)
16 estates ranked 'Scotland' first (25%)
14 estates ranked 'Europe' first (22%)
7 estates put 'rest of the world' first (11%)

Hinds (out of 50 estates who answered this question)
22 estates ranked 'rest of UK' first (44%)
21 estates ranked 'Scotland' first (42%)
7 estates ranked 'Europe' first (12%)
None ranked the 'rest of the world' first or second

20) Approx area of ground for stalking

Stalking areas ranged from 1,848 acres (748 hectares) to 111,200 acres (45,000 hectares)
Average = approx 23,000 acres or 9,300 hectares.

21) Additional comments

Around 20% of the estates mentioned problems with walkers (and to a lesser degree mountain bikers), with many stalking days being ruined by them.

Approximately 20% of estates alluded to neighbouring estates with different management objectives (forestry, deer reduction culls or grouse moor management), which have reduced deer numbers (especially mature stags) and stalking income.

The severe winter of 2009/2010 affected deer numbers.

It was suggested that a future survey might include information about 'tipping' and about roe deer.