



Snapshot survey to investigate lost income to estates from cancelled stalking and lost associated accommodation income due to COVID-19 restrictions

1. Background

ADMG has undertaken a 'snapshot survey' to assess what impact restrictions on let stalking due to the COVID-19 crisis are having on deer management/stalking businesses.

Factors include restrictions on incoming overseas travel/visitors (and UK quarantine rules), and changes to accommodation provision (both catered/serviced lodges, and self-catering).

The survey coincided with what is historically the peak of the stag season, but prior to the opening of the hind season on 21 October.

We wanted to assess lost revenue from cancelled stalking lets, and also revenue lost from cancelled related accommodation, with these figures presented separately.

We wanted to assess whether arrangements for deer carcass collections were happening as planned, and what price producers were receiving from game dealers.

With the hind season not yet underway, and to run to mid-February 2021 several respondents did not yet know what level of cancellation might result for this period.

There were 34 respondents. Of these, 5 (15%) said they had experienced or were expecting to experience no change to or loss from their sporting lets, or their accommodation rentals for either stags or hinds.

One response has been set aside from the calculations where indicated. This high-end 'outlier', whilst extremely relevant, undertakes deer management across a number of estates, and, because of the extent of its reported anticipated loss, would significantly bias the median and mean data for the rest of the survey responses. Consequently, its numbers are separately reported at (6).

The total for all landholdings/businesses reporting a loss including the outlier (29) for lost stag and hind revenue and associated accommodation rental is **£1,109,000**

Excluding the outlier this figure for 28 respondents is reported as **£725,000**

2.1 Cancelled stag stalking lets – loss of income

Total reporting a loss (28 respondents)	£545,300
Total less outlier (27)	£375,700

Losses, excluding the outlier response, range from £1,500 to £68,000.

Mean loss	£ 13,900
Median loss	£ 5,600

2.2 Cancelled accommodation – stag season

Total reporting a loss (25 respondents)	£397,900
Total less outlier (24)	£260,500

Cancelled accommodation, excluding the outlier response, for the stag season ranged from £1,000 to £80,000

<i>Mean loss</i>	£10,900
Median loss	£ 5,000

3.1 Cancelled hind stalking lets – loss of income

Total reporting a loss (18 respondents)	£114,500
Total less outlier (17)	£ 65,000

A number of businesses did not yet know the extent of cancellations that they would incur during the hind season. These figures reflect only those responses that had already received cancellations for hind stalking.

Where income from cancelled hind lets could be established this ranged from £1,325 to £15,000.

<i>Mean loss</i>	£ 3,800
Median loss	£ 2,500

3.2. Cancelled accommodation – hind season

Total reporting a loss (14 respondents)	£ 50,400
Total less outlier (13)	£ 23,400

<i>Mean loss</i>	£ 1,800
Median loss	£ 1,000

4. Totals – all stalking and accommodation

Taking into account all cancelled stag stalking and related accommodation, and reported or estimated hind stalking and related accommodation, the total loss overall for 28 respondents (excluding outlier) is reported as **£725,000**.

The average and median losses across all 28 (excluding outlier) impacted by Covid-19 restrictions are as follows:

<i>Mean loss</i>	£ 28,900
Median loss	£ 11,600

5. Respondent numbers by range of loss (excluding outlier)

Total loss per respondent ranged from under £5,000 at the low end to much larger losses of £83,000, £93,500 and £147,900 at the top.

£0 – 20,000	£20,001 – 40,000	£40,001 – 60,000	£60,001 – 80,000	£80,001 – 100,000	£100,000+
19	4	1	1	2	1

6. Outlier

The outlier, a business that manages stalking across a number of estates, reported cancellations of a total 33 weeks stags and 18 weeks hinds with associated losses of £169,500 for stags (plus £137,500 stag related accommodation), and £49,500 for hinds (plus £27,000 hind related accommodation), at a total loss of £383,500.

7. Game dealer collections and prices

33 out of 34 respondents reported that their game dealer collections were happening as planned. Only 1 respondent reported difficulty in this area.

28 respondents reported the price paid for venison. This ranged from .80/kg to £1.40/kg.

A number of those sampled reported that their overall venison income, because of a reduction in price from £2.00+/kg in 2019 to c £1.00/kg this season, would be considerably reduced also, over and above losses from stalking and accommodation.

8. Alternative routes to market

11 respondents (34%) said they were using other routes to market for their venison including: direct marketing and local sales; sales to local butcher; sales to restaurants and shops; and gifting of product.