



REPTA

Reptile and Exotic Pet Trade Association

Energy Impact Report

Business and Welfare

(The link between business and animal welfare)



£239 - 319

Million
Per Annum

Estimated turnover of specialist pet centres £239 million

Inclusion of online sellers this increases to £319 million

Inclusion of chain pet stores selling reptile related products and feeds this increases to £500 million

Losses of
£53.36 - £70.91

Million

22.23% reduction in turnover costing £53.36 million in the past two quarters.

Losses expected to increase rapidly in early to mid-2023

Energy prices up **271%**

Average energy price increases in the last six months 271%.

Current tariffs being offered far more than this, constituting a 450-790% increase.

+280 %

Business failure rate

Wholesalers report a 280% increase to specialist pet centre failure rate from 2021.

More expected before end of 2022

+193%
surrender intake

A stark rise in animal surrenders to specialist pet centres. **193% in the past six months.** Each centre that closes affects surrender intake and in turn animal welfare. Centres becoming less willing to take on surrendered animals.





<p>£53.3 million</p> <p>↓</p>	<p>An estimated loss of £53.3 million in the last 6 months. Including online businesses these losses could be as high as £70.9 million.</p>
<p>271 %</p> <p>↑</p>	<p>Energy prices have risen on average 271% in the last two quarters. Latest tariffs are reaching over £1.00 kWh, totally unsustainable and a clear threat to solvency. Wholesale cap ineffective.</p>
<p>82%</p> <p>↓</p>	<p>82% of centres gave a longevity rating to their business dues to the energy and cost-of-living crises. Average lifespan just under 6 months.</p>
<p>£206.8 million</p> <p>↓</p>	<p>Potential losses of up to £206.8 million by November 2023 if centre predictions about longevity are correct.</p>
<p>14-40 %</p> <p>↑</p>	<p>The accepted threshold for fuel poverty is 10% of income. Specialist pet centres that have renewed in the last 6 months could be spending up to 40% of their income on energy, 30% past the threshold.</p>
<p>280 %</p> <p>↑</p>	<p>280% increase in specialist pet centre failure rates year on year. Rate expected to jump exponentially in the first quarter of 2023. Each failure increases pressure on re-homing network.</p>



193.19%



Demand to take in surrendered animals up by 193.19% in the last six months.

As centres begin to refuse intake extra pressure on re-homing network.

47,776



47,776 animals will have been surrendered by June 2023 if current pattern holds.

Rapid increase expected in first half of 2023, figure expected to be far higher.

48%



The National Centre for Reptile Welfare (NCRW) has seen a surge of 48% intake to the centre.

Rise in homes citing cost of living and energy prices.

NCRW now over capacity.

53.1%



Specialist pet centres considering or making full-time redundancies 53.1%.

Each member of staff lost has a palpable effect on animal welfare in store. Primary care givers to animals will be lost.

50.1%



Centres are considering or already begun to reduce hours of exposure to heat and light for animals held in store.

Direct impact of energy costs.

Threatens to lower welfare standards and health.



Energy Impact Report

Supporting Information

REPTA has undertaken analysis of the specialist pet centre network to ascertain pressures they are facing and possible outcomes without intervention from government. Further research from the reptile rescue network, wholesalers and manufacturers has also given the most complete overview of the industry to date. What welfare centric and economic implications are present, and what if anything can be done.



REPTA: Who are we?

The Reptile and Exotic Pet Trade association. Our combined experience runs the gambit of reptile related industry. From front facing public interaction, to the rescue network and on to wholesale and manufacture our talent pool spans all levels of the industry. REPTA seeks fair representation to government of our specialist industry.



Introduction

Reptile keeping is the fastest growing sector of the pet market. Reptile keeping dates to the 1700's, the ascension of modern reptile husbandry has taken place over the last 5 decades. Modern lifestyles are less compatible with traditional pet types such as dogs, cats, and birds. Traditional pets rely on the presence of a care giver with far greater regularity than reptiles & amphibians. Modern life means less time is spent by pet owners in the home.

Reptiles do not require twice daily walks, nor do they require twice daily feeds. Their waste production is modest, so maintenance compared to traditional pets is lower. Reptiles & amphibians are hypoallergenic meaning a population with a growing prevalence of pet allergies can have a companion animal in the home. Reptiles are contained and as such do not soil the house or moult reducing the burden on the homeowner.

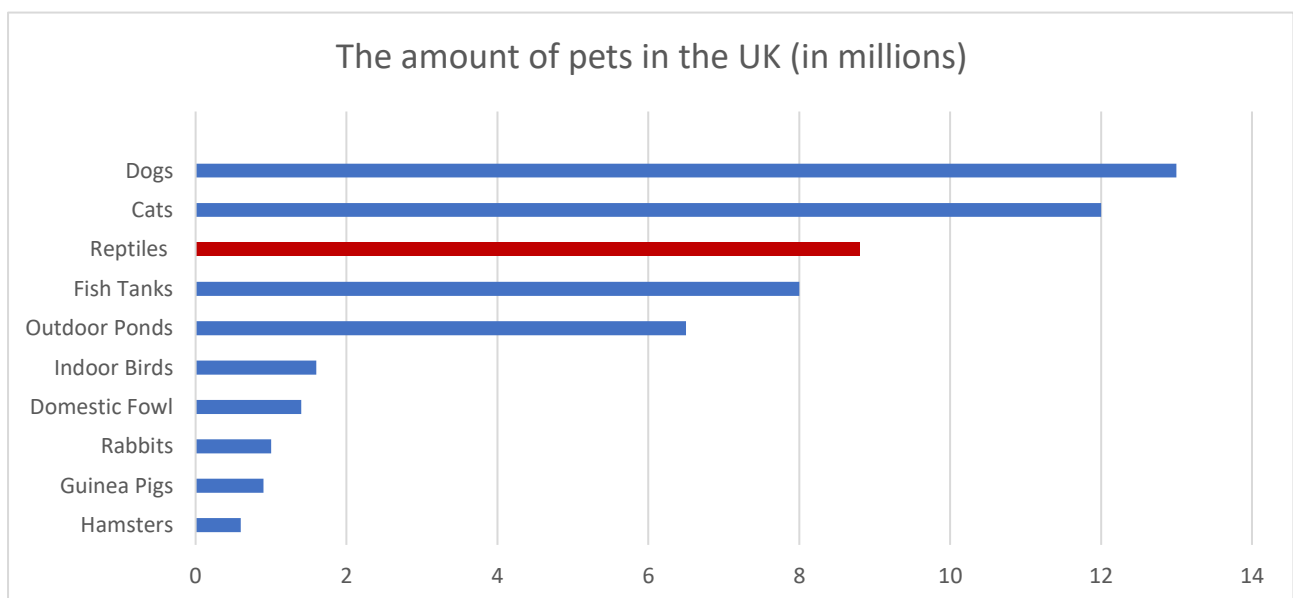


The rapid ascension of reptile keeping has seen an estimated population of captive reptiles (8.8 million) become comparable to dogs (13 million) and cats (12million).

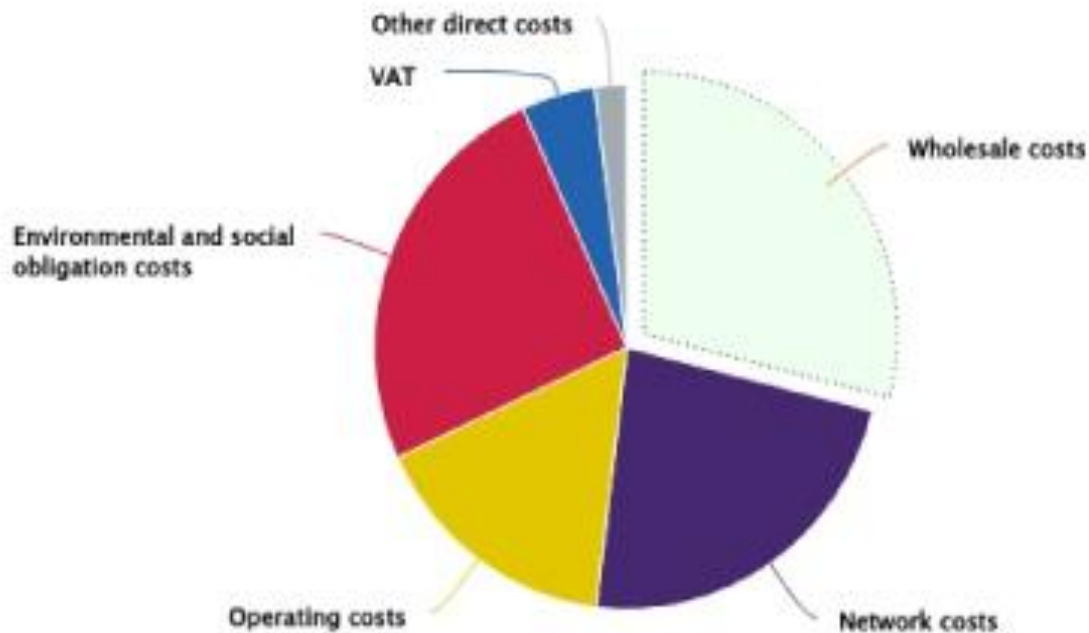
Technological advancements of the reptile and amphibian industry has made the UK a world leader in research and development. Product development has seen advances in heating, lighting, control systems and dietary technologies. With a vast export network, the UK offers a net raising of reptile and amphibian welfare worldwide.

The mechanism that has allowed such growth is the proliferation of specialist reptile centres nationwide. As a result, a network of wholesalers and manufacturers have modelled their business around servicing this pet centre network. Recent economic pressures and rampant energy pricing increases places this infrastructure in peril. As providers of essential infrastructure to the pet keeping public of Great Britain, they are relied upon to stock feeds, housing, and sundries for these pets. Specialist pet centres are pivotal in the absorption of surrendered animals from homes where financial situations may have changed.

The cost-of-living crisis and soaring energy bills are affecting most homes across the UK, a surge in pet surrenders across all sectors has been seen. Reptiles, however, lack the re-homing infrastructure of dogs and cats. The only way these animals can be rehomed, and their care maintained is through the specialist reptile centre network.



Breakdown of an electricity bill



The issues: An Overview

The clearest threat to the future solvency of the reptile industry is energy pricing. The government introduced a cap to the wholesale portion of a business's energy bill. The cap was set at £0.21 per kWh. The wholesale element of the energy bill is around 29%.

The single most volatile sector for energy companies to work out their tariff prices is the wholesale element. How have prices increased up to 443-788% with the cap in place?

With this capped at £0.21 this should have neutered any issues with price rises but this has proven to not be the case. Energy prices have risen on average 271% over the last 6 months. Shops that have renewed their tariff within the last 2 months have been hardest hit with renewals coming in at between £0.80-£1.60 kWh (this represents a 443-788% rise). These prices cannot be negotiated as the reptile industry is highly reliant on affordable energy to be able to function. New tariff prices will put many businesses in a state of fuel poverty. Some shops are spending 40% of income on energy bills. Without governmental ringfencing of the reptile industry as a highly vulnerable sector, it will collapse.



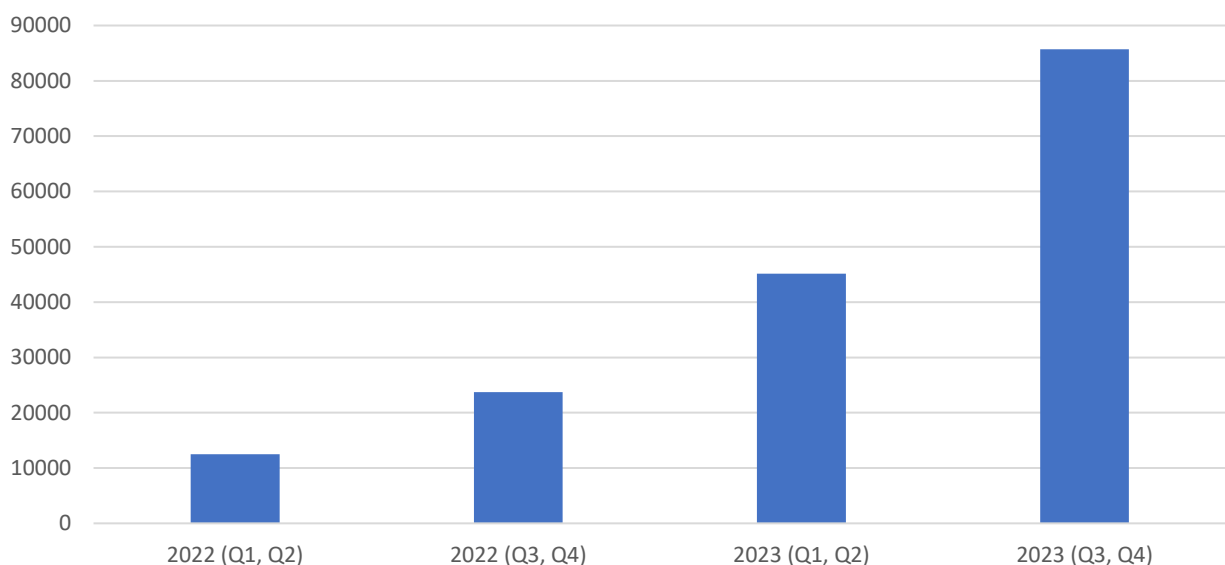
The Knock-on effects

REPTA's survey found that the bricks and mortar specialist pet centre network of the UK is the single biggest contributor to the reptile welfare state in the UK. Intake has risen from an estimated 12,365 animals in the first half of 2022 to 23,888 currently.

As the cost-of-living crisis begins to bite a rise of 193.19% in animal surrenders to centres has occurred. If the rate holds at 193.19% for each 6-month period will see highly problematic levels of animals surrendered. We are expecting the increase rate to worsen; however, as the nation's economic health deteriorates. Even without shop closures there comes a point where no more surrenders can be accepted by pet centres, or they have reduced their capacity (enclosure numbers) and there is the very real risk of an under resourced independent reptile rescue network being inundated and this will lead to mass euthanasia of species.



Animal surrender intake to specialist reptile centres

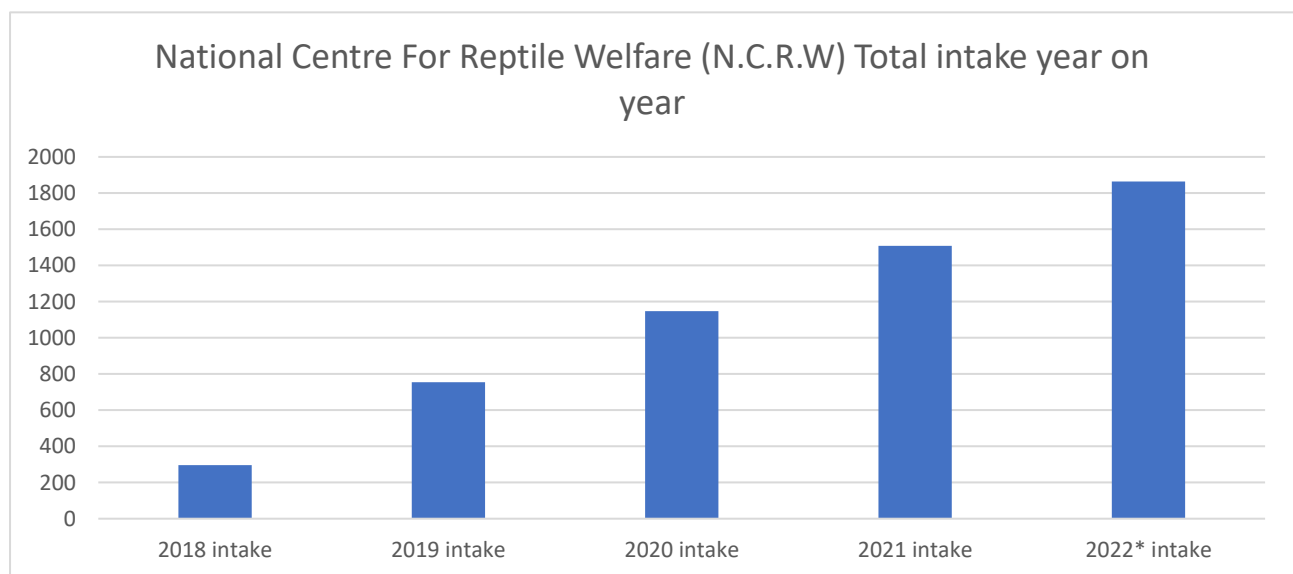




These pressures from surrenders will be being felt across all pet sectors as families must give up their cherished companion animals as they try to keep their head above water.

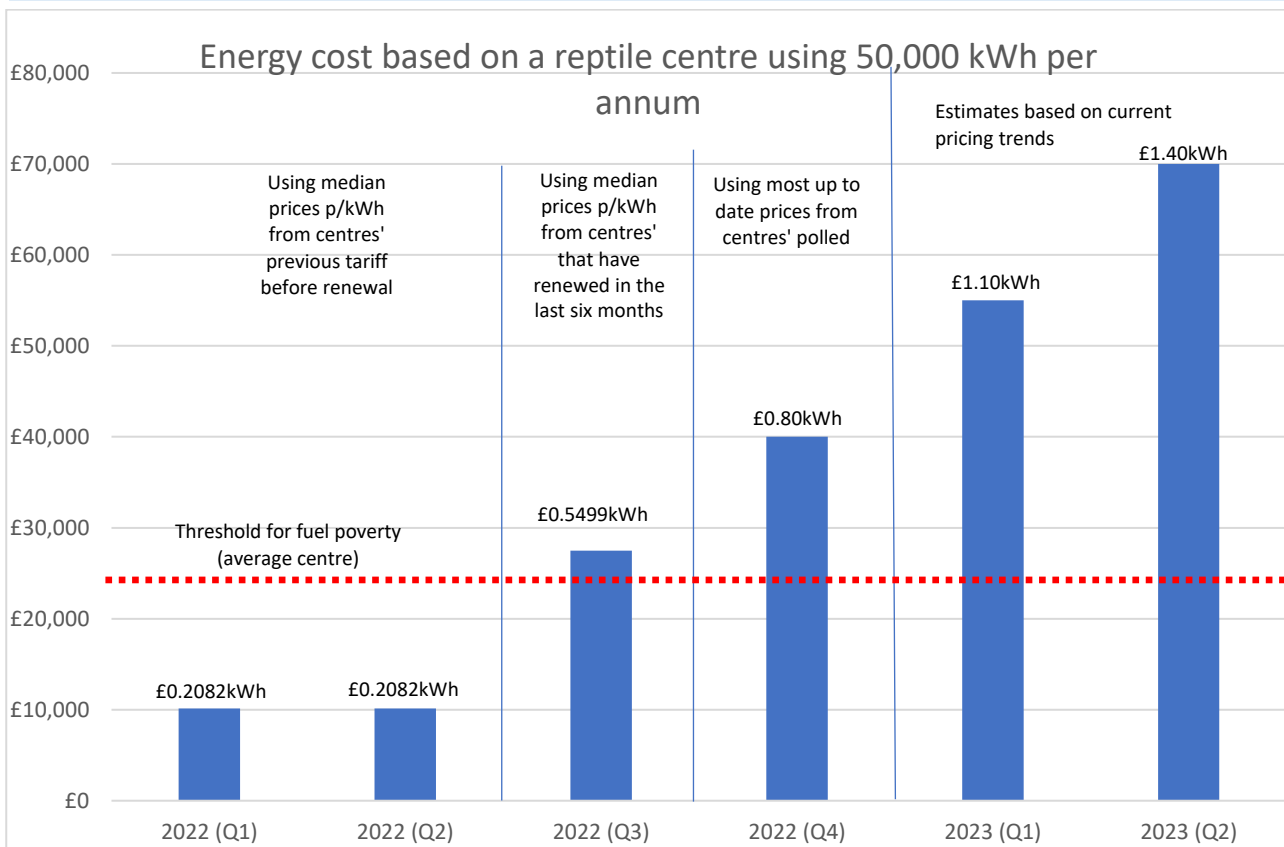
Dogs, cats, and small furry animals (AKA the traditional pets) have a far more developed rescue network spearheaded by the RSPCA. Only one RSPCA centre (Brighton) has reptiles are part of their regular intake. This makes surrendered reptiles and amphibians extremely exposed to losing their life. This is a failure of the RSCPA to recognise a need for provision.

Inevitably, there will be business closures because of energy pricing and a public fearful of spending on their animals or introducing new animals to their home. As these businesses are forced to close this leaves homeless animals even more exposed. With a lack of pet centre infrastructure to take surrendered animals to; pet owners may take more desperate steps to free themselves of their animal such as wild release. Such steps would prove highly problematic for British ecology. Animal welfare and the operating health of the reptile centre network are inextricably linked.



In the below example we use a reptile centre consuming 50,000 kWh per annum. Some reptile centres have usage more than 100,000 kWh per annum. For a realistic median usage, we have used a consumption figure of half of this. Specialist reptile centres are energy intensive businesses. The animals housed within are cold blooded and must be heated to temperatures germane to their biome of origin. These factors mean access to reasonably priced energy is a must.

If the median annual turnover of specialist reptile centres in the UK is estimated at £244,984 per annum, then the threshold for fuel poverty is an annual energy spend of £24,498. The median energy price if shops have renewed their energy in the last 6 months is £0.5499 kWh which equates to an annual spend for the below shop of £27,745. Reptile centres that have renewed their energy in Q3 of 2022 are already in fuel poverty. Shops that have renewed within the last two months may see spending reach triple or quadruple the threshold for fuel poverty.





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Reptile and Exotic Pet Trade Association

Energy Impact Report

Business Impacts

- The median annual turnover of specialist reptile centres in the UK is £244,984
- Using data available from 2016 there are 979 centres licensed to sell reptiles (REPTA estimates this will have increased since this data was published but in the absence of any more up to date figures this will be the metric used to calculate figures. REPTA would estimate the number of centres licensed to sell reptiles being closer to 1,200)
- With the addition of centres selling reptile equipment, feeds, and infrastructure but not livestock would bring the total to an estimated 1500 pet centres.
- The estimated turnover of shops selling reptile livestock is £239.8 million per annum. If we consider internet-based companies (they currently solely responsible for purchasing 33% of wholesaler product lines £319 million) and non-specialist stockists of reptile equipment REPTA would estimate an industry worth £500 million per annum.

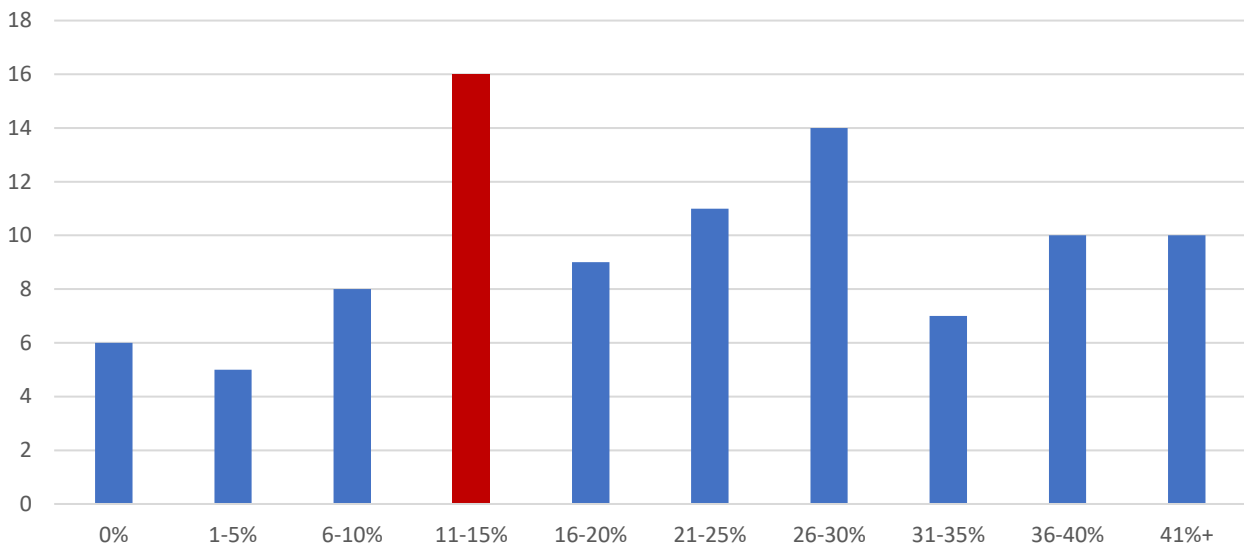




- Specialist pet centres employ both part- and full-time staff with an estimated workforce of 3,798 people either in full or part time employment. (2.41 full time and 1.47 part time)
- This does not include business owners and business partners. Including owners, assuming there is just one owner the figure rises to 4,777 people.
- Using the national living wage of £9.50 p/hr as the mechanism for calculating spending on employment (40 hours per week for full time) (20 hours per week for part time) the specialist reptile centre network contributes £60.63 million to the economy by way of wages per annum. Centre managers and supervisors will undoubtedly be paid more than this.
- 53.1% of centres polled are considering or are making full time staff redundant because of the energy and cost-of-living crises.
- 51.6% of centres polled are considering or are making part time staff redundant because of the energy and cost-of-living crises.
- Each member of staff that leaves a business will have a palpable effect on animal welfare as there are less people to tend to the livestock.

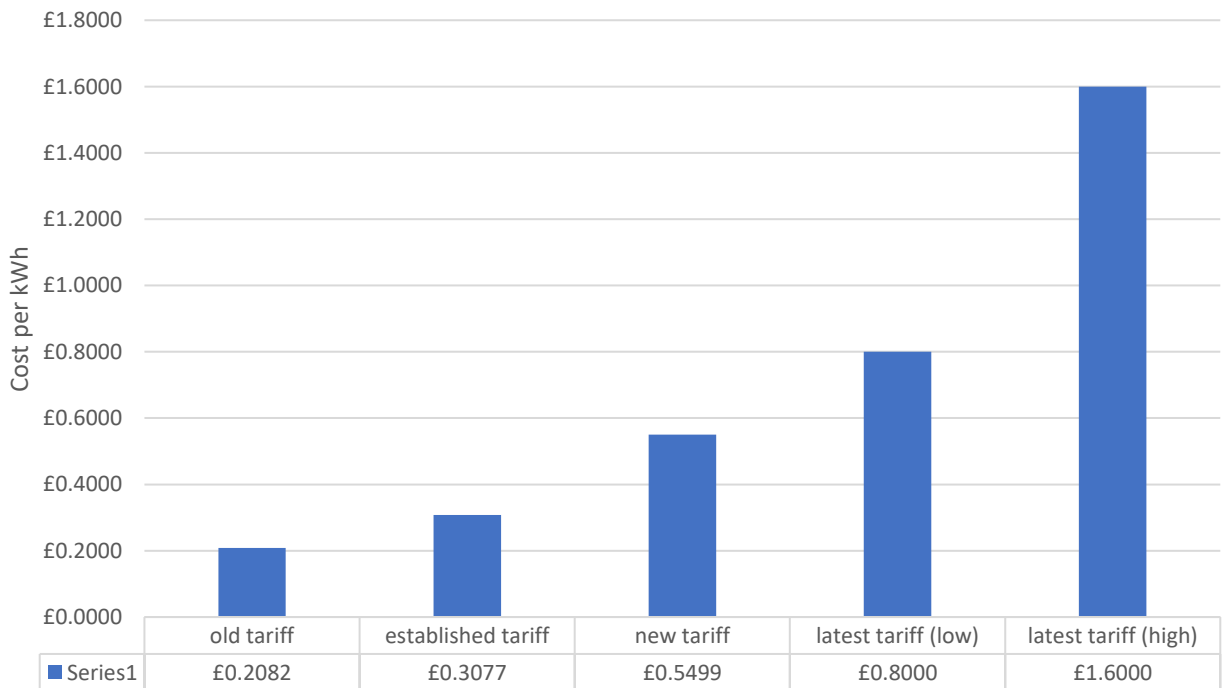


What percentage of turnover reduction have you seen?



- Only 6.25% of centres polled stated their turnover had been unaffected.
- Of the remaining 93.75% the median % of turnover reduction that has been seen this year is 22.23%, this constitutes a contraction of the industry by £53.1 million
- Energy prices are up on average 271.15% from £0.2082 kWh to £0.5499 kWh meaning a shop using 50,000 kWh per year is spending £27,495 per annum and is **in fuel poverty**.

Energy Price increases



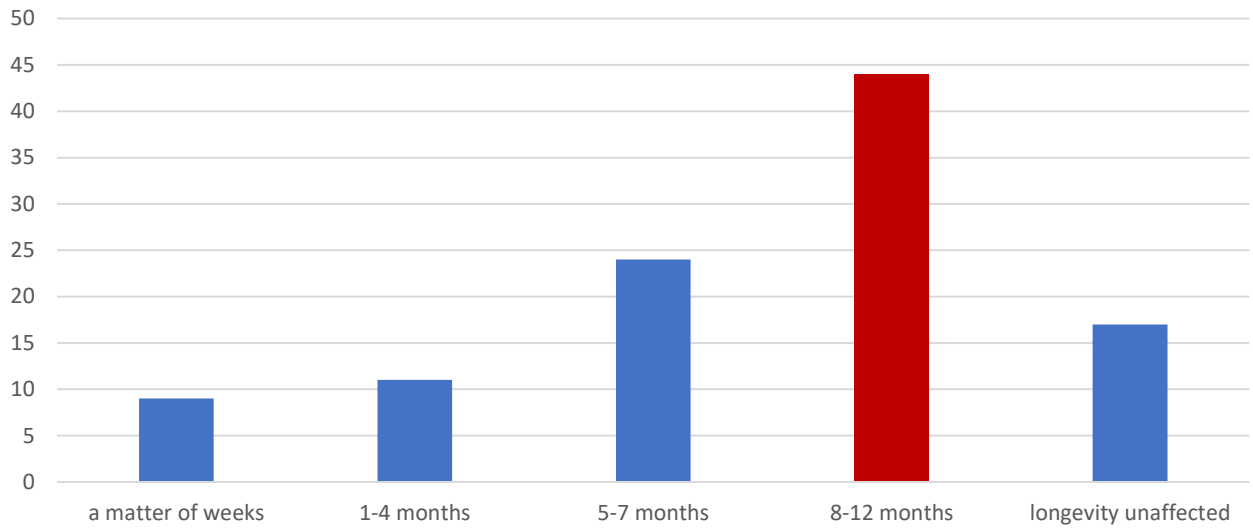
If wholesale portion of the energy bill has been capped at £0.21kWh how can prices continue to rise at this rate? Whilst there may be some fluctuation to be expected in the other sectors of the energy bill, the area most likely to change is the wholesale element. How therefore can it be possible for prices to reach +788% or more? The highest quoted kWh rate by a specialist pet centre owner is £1.60kWh. This is punitive pricing and catastrophic to the continuation of business. For shops facing these renewal prices it is therefore a case of when they become insolvent rather than if.



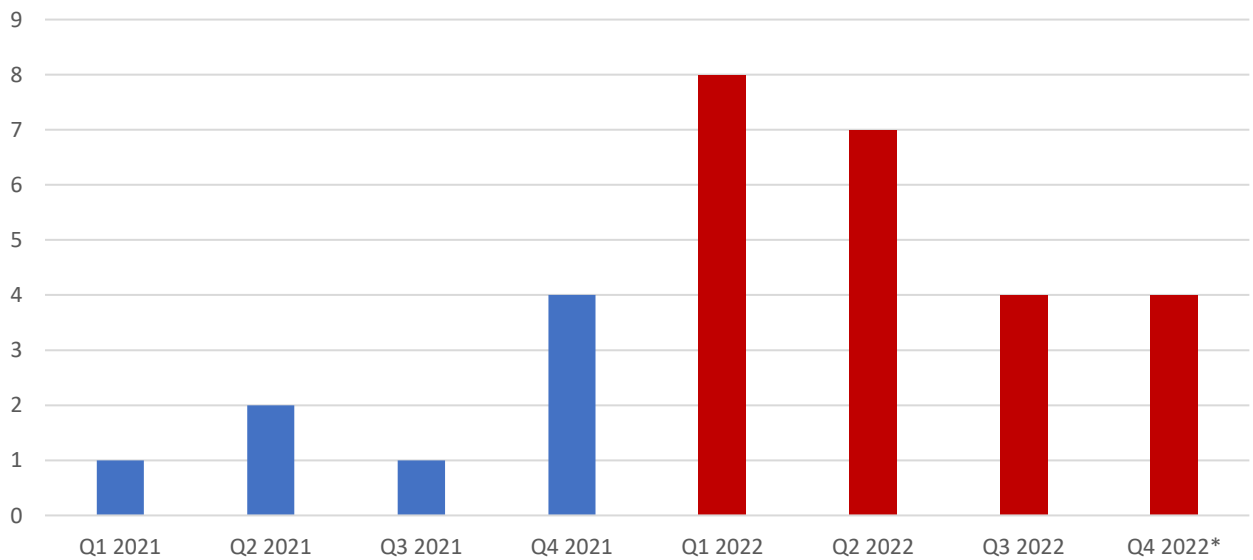
- Centres were polled about the longevity of their business if current trends continue or worsen (without government help or a serious economic improvement), only 17.7% of respondents believe their longevity was unaffected.
- Of the remaining 82.3% that gave a rating for their longevity the median lifespan was just under 6 months (24.33 weeks / 5.6 months)
- This is not just new businesses; the average trading age of shops is 13 years. Established and traditionally solvent shops are being driven to bankruptcy.
- Shops with a longer trading history may have greater reserves of savings to draw on than neophyte businesses but those reserves will be gone in an average of 6 months.
- 9.3% of respondents rated their longevity as a matter of weeks
- A further 11.45% of respondents rated their longevity as 1-4 months
- If a contraction of £53.31 million has already been seen bringing the total estimated turnover of reptile centres down to £186.53 million (from £239.83 million). Assuming the above 20.75% of respondents are accurate with their assessments of longevity this will see a further contraction to £147.81million (a total loss of £92.02 million) by the beginning of May 2023.



Longevity of business

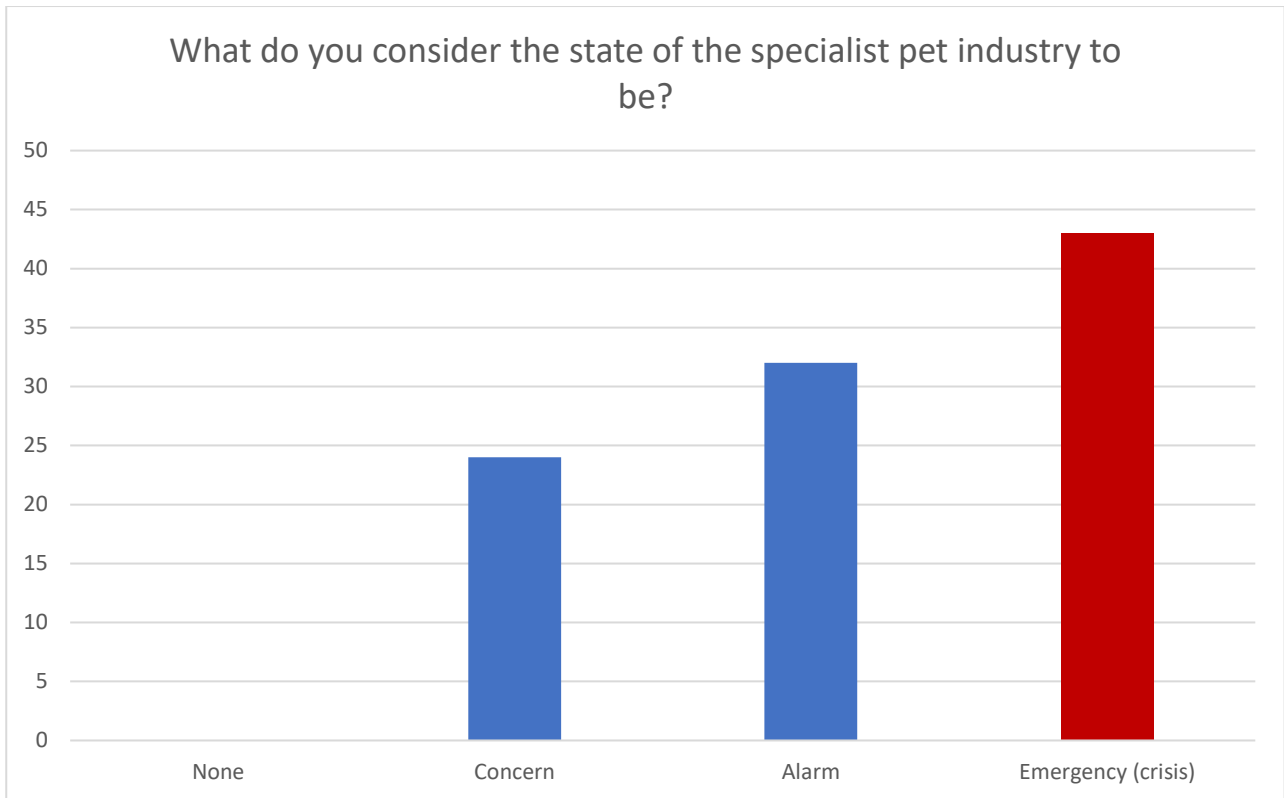


Specialist Pet Centre failure rates(*table made mid November, no data for Dec 2022)



- Information received from the wholesaler network cites an alarming increase in business failures. Figures from one such wholesaler stated failures had increased from 6 businesses in 2021 to 23 businesses in 2022. It is anticipated the final quarter of 2022 will see the highest failure rate seen.
- Respondents were asked to rate what level of 'concern' the reptile industry was in currently 76% stated in was either in a state of alarm or a state of emergency (crisis)

The above pressures have no doubt taken a toll on centre owners, they were asked to rate their level of anxiety regarding future of their business, energy prices and the economic downturn. 98.97% of business owners are suffering some form of anxiety, mental health welfare is being seriously affected by matters covered in this document.





Energy Impact Report

Welfare Impact

Reptiles historically have largely gone without any formal rescue / re-homing structure. Reptiles that had been abandoned or surrendered would be 'rescued' by private individuals with spare infrastructure within the home to take them in.

All but one branch of the RSPCA provide any formalised intake for reptiles in the UK. Even with a now estimated population of 8.8 million captive reptiles in the UK this has not changed. Just one RSPCA centre has provision for reptiles, and this is based in Brighton on the south coast. The rest of the UK is untended.

In 2018 the National Centre for Reptile Welfare opened using the grounds of Hadlow College in Tonbridge, Kent. This was the brainchild of Chris Newman who spearheaded its development. Infrastructure was donated from Pets at home when they reduced reptile livestock sales in the UK. Major UK wholesalers and manufacturers also provided much needed assistance and funding to get the centre off the ground. The feeling was that there was a need for specialist reptile re-homing centre in the private sector. One of the major arguments for the centre's creation was data collection so that not only numbers of animals coming in could be recorded but also the 'why'.

The NCRW is now the largest reptile re-homing centre in the UK. Intake this year has exceeded 1,800 animals (1,953 animals as of 1st December 2022) and the centre is now over capacity. Intake this year is already up 23.6% on 2021 and there is still the remainder of November and December to account for. If we look at Jan-Nov 2021 vs 2022 the increase is 48%. We can safely assume this figure will break 2,000 animals before the year is out. Whilst the NCRW undertakes sterling work they simply cannot re-home animals faster than they are coming in.

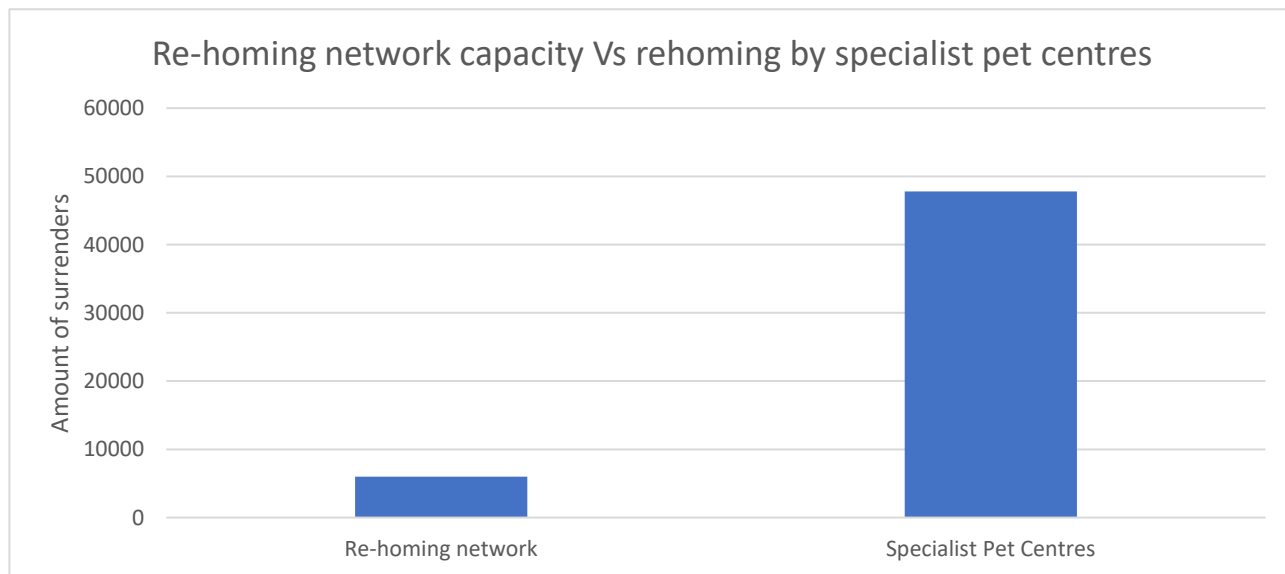
Apart from the NCRW and a single branch of the RSPCA any other re-homing work is undertaken on an ad-hoc basis by members of the public. It is difficult to ascertain exact figures for their re-homing work but REPTA estimates total re-homing capacity of reptiles not to exceed 6,000 animals per annum.



A maximum capacity of 6,000 animals per annum is 0.00068% the population of reptiles in the UK.

Businesses have re-homed 24.39 surrendered animals per specialist pet centre in the last 6 months. This is an estimated total of 23,888 animals. Taken over a year this is 47,776 animals. This is 796% the total estimated capacity of the reptile re-homing network.

- Re-homing efforts of the specialist pet centre network has come under mounting pressure this year with an increase of 193.19% from the first two quarters of 2022.
- REPTA is expecting a considerable increase in demand for taking in surrendered animals to both the re-homing network and specialist pet centres. There are of course pet centres that do not take in surrendered animals putting yet more pressure on the centres that do.



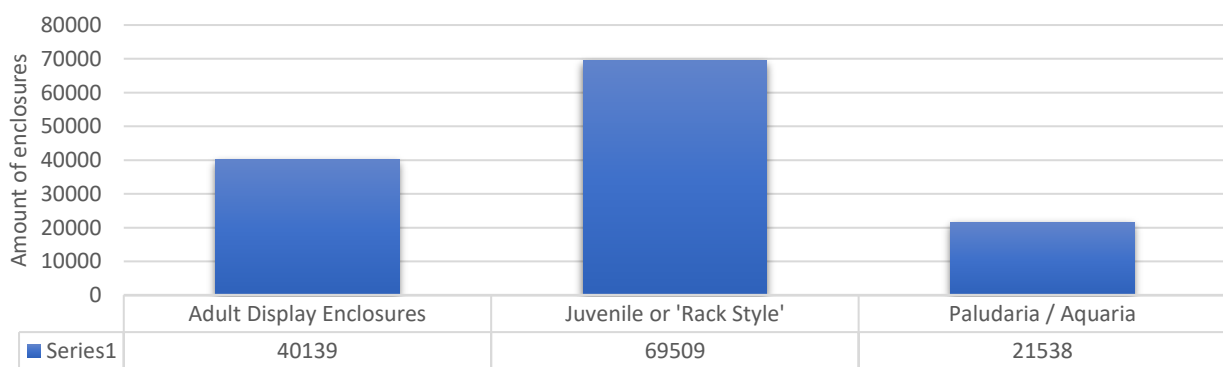
- When centres begin to fail so too does the capacity to re-home surrendered animals. This puts a greater burden on the specialist pet centres that are still willing to take in surrenders and floods an already inundated re-homing network.
- Mass euthanasia is going to occur. This will include protected and endangered species.
- We must of course factor in the animals in residence at the specialist pet centres across the UK. They too will enter the rehoming network when companies fail.



- The median number of adult enclosures is 41 per centre. An estimated total of 40,139 enclosures. Many species are cohabited at these pet centres and a headcount of 2 animals per enclosure has been used to calculate the population of these enclosures (Some species, particularly juvenile lizards and amphibians are housed in colonies of 5,10 or 15 animals. Other animals are solitary and will live alone). This brings an estimated 80,278 animals in adult enclosures.
- The median amount of juvenile or 'rack type' enclosures is 71 per centre. An estimated total of 69,509 enclosures. These type of enclosures for the most part are single occupancy. This brings an estimated 69,509 animals in juvenile or 'rack type' enclosures.
- The median amount of paludaria and or aquaria is 22 per centre. This style of enclosure will invariably be used for tropical frogs, geckos, and turtles. It is very common to have multiple animals occupying an enclosure and as such we have used a headcount of 3 animals per enclosure for this estimate. The estimated number of enclosures is 21,538. The occupancy of these enclosures is estimated to be 64,614 animals.
- This gives an estimated population of 214,401 animals in specialist pet centres across the UK.



Available enclosures in specialist pet centres



The annual number of surrendered animals is an estimated 47,776 and estimated capacity in specialist reptile centres is 214,401. Surrendered animals will account for up to 22.28% of available space in these centres. Many of these animals will require considerable time, food, energy, and possibly even veterinary intervention to make sure they are suitable for re-homing. This puts inordinate strain on the specialist pet centres. They do this of course because primarily they are animal lovers with a passion for reptiles.

- The failure rate of specialist pet centres is on the rise with a 280% increase year on year so far with wholesalers expecting this to become much worse. The centres that have already closed have further added to the re-homing burden as their livestock they held in store has joining these figures.
- Centres that have adjudged their longevity to be a matter of weeks was 9 businesses. Should they close that will be another 1,971 animals needing to be re-homed before Christmas 2022. This is nearly the total annual intake of the NCRW.
- Centres that have adjudged their longevity to be 1-4 months that is another 11 centres bringing the total to 20. This would result in 4,380 animals needing to be re-homed by the end of March 2023.



- **This will be the biggest impact to the animal welfare state in living memory.**
- Surrendered and rehomed animals could have medical or parasite issues which would see them isolated from the remainder of the shop population. This will impact a shops stock levels of livestock that can be sold in the meantime.

Difficult choices are being made and the generosity of pet centres to animals requiring homes will waver. It is imperative these centres are supported in a manner that their accommodation of surrendered animals continues to avoid catastrophe at re-homing centre level.



With a severe contraction in turnover, increasing costs to goods purchased (inflation of reptile related equipment is far greater than that of the national average) and energy prices that are either already punitive or will be when renewal takes place businesses are looking to other areas of the business where they can streamline. Inevitably they will centre upon the second largest area of expenditure in store, the payroll.

- 53.05% of businesses are considering or will be making full time staff redundant. Not only is this a major blow to the economy but has a tangible effect on the efficacy of animal welfare within the business. With less available hands to tend to livestock there is the potential for a demonstrable fall in welfare.
- 37% of specialist reptile centres are sole traders or partnerships and face the full liability of debts accrued in trying to keep their business alive. If energy prices continue to impinge on their ability to do so they have little or no choice but to let staff go.



Specialist pet centres are consciously reducing the level of livestock and the capacity to house animals in store. This further affects the number of surrender animals that can be taken in. The knock on being that they will present to an already over capacity re-homing network.

- 70.70% of specialist pet centres are considering or already have reduced livestock levels. The median amount of reduction being 11.54% with this set to rise as winter comes with higher energy costs.
- 63.63% of specialist pet centres are considering or already have reduced enclosure capacity. The median amount of reduction being 9.04%. Of those centres that have consciously made reduction the level is 18.82%

www.petkeen.com estimates that there are

- 664,000 dogs looking for homes (5.1% of the estimated population)
- 1.2 million cats looking for homes (10% of the estimated population)
- REPTA estimates there are 53,776 reptiles looking for homes (0.61% of the estimated population). Reptile rehoming figures currently are a fraction of that of the traditional pets. However, if support is not offered to this sector this will change markedly for the worse. The usual resolve of the reptile keeping public for taking in homeless reptiles cannot be relied upon in the current climate.
- A huge jump in surrendered animals is expected in the first half of 2023. The numbers predicted will be unprecedented.
- Existing infrastructure is totally inadequate to meet demand and is likely to collapse from pressure.
- **Mass euthanasia of perfectly healthy animals will occur.**



Conclusions

Without government intervention to safeguard specialist pet centres a large proportion are at risk of insolvency or bankruptcy. Not only will such outcomes affect industry contributions to the economy but also seriously negatively impact the animal welfare state of the UK.

The use of affordable energy is a pre-requisite for these companies to be able to function. With an increase of 271% or more over the last six months and current renewals reaching between 450-788% + the energy pricing landscape is unsustainable and could spell the complete destruction of the industry.

The specialist pet centre network of the UK has already suffered a contraction of an estimated £50 million or more. As winter deepens and the reliance on energy becomes more apparent REPTA fears a marked increase in issues for these businesses.

REPTA estimates a loss of over £100 million (a reduction of the industry by 41.3%) by June 2023 if action is not taken.



Should this scenario play out, as businesses fail it will also collapse the specialist wholesaler network with a turnover in 2021 of approximately £45,000,000 combined (using latest accessible figures from the two main wholesalers submitted accounts to companies' house, there are however many more smaller wholesalers). All funding for research and development into improving animal welfare would stop and it is expected these wholesalers would become insolvent also. At this point pet centres that thought their longevity to be unaffected will be seriously negatively impacted too, without access to live feeds, frozen foods, and essential products it is likely they would become insolvent too. There comes a point where the decline becomes too steep for the entire industry to recover from.



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Appendix I : Survey Data

Introduction to Survey Data:

Here we present the data collected from Specialist reptile centres around the United Kingdom. Total respondents were 100 businesses.

Throughout this document reference is made to a figure of 979. This is the number of businesses licensed to sell reptiles in a 2016 Freedom of Information request document produced by OATA (Ornamental Aquatic Trade Association). REPTA believes this number to be nearer to 1,200 businesses presently but in the absence of more up to date numbers this document shall default to the figure of 979. This will lead to estimates being lower than the actual figure or impacts.

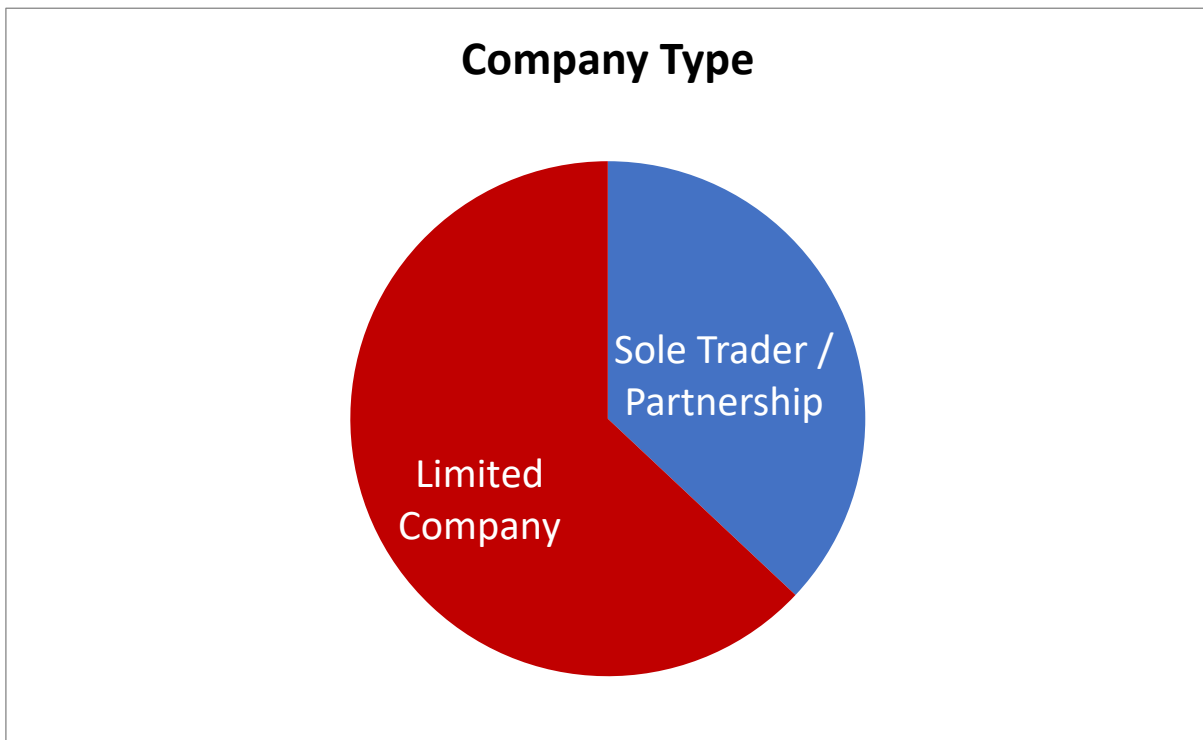
This figure is used to create an estimation of industry size whether considering turnover, employees, and number of animals kept etc. This will help calculate impact caused by the energy and cost-of-living crises.

Methodology of calculations is provided as well as basic analysis and extrapolation where appropriate.



Question 1.3: What type of business are you? (What level of liability would you face should your business fail?)

Sole Trader / Partnership:	Limited Company:
37%	63%
37 respondents (100 total)	63 respondents (100 total)
An estimate of 362 pet centres	An estimate of 617 pet centres



37% (or 362 centres) of specialist pet centres are sole traders or partnerships. These companies are liable for all debt, should these companies fail supplier and taxation debts can be pursued.

63% (or 617 centres) of specialist pet centres are limited companies. These companies bear limited liability and debts may not be able to be recouped by either suppliers or government. Should companies fail government may find it difficult to recoup amounts owed.



Energy Impact Report

Appendix I : Survey Data

Question 1.4: How long has your business been trading?

Options	Median	Respondents	Total
0-2	1	16	16
3-5	4	13	52
6-7	6.5	3	19.5
8-9	8.5	9	76.5
10-15	12.5	27	337.5
16-20	18	6	108
20-24	23.5	8	188
25+	27.5	18	495
		100	1292.5
			12.925 years



Methodology:

A median figure in years has been used for each option. This gave a total multiplied by respondent numbers. This was then divided by the number of respondents to give the average overall.

Basic Analysis:

Not just neophyte specialist pet centres are affected by the energy and cost-of-living crises. The highest respondent group showed a trading history of 10-15 years. The median age of businesses is 12.925 years. Such businesses are traditionally solvent with a proven track record of paying taxation and contributions for employees.

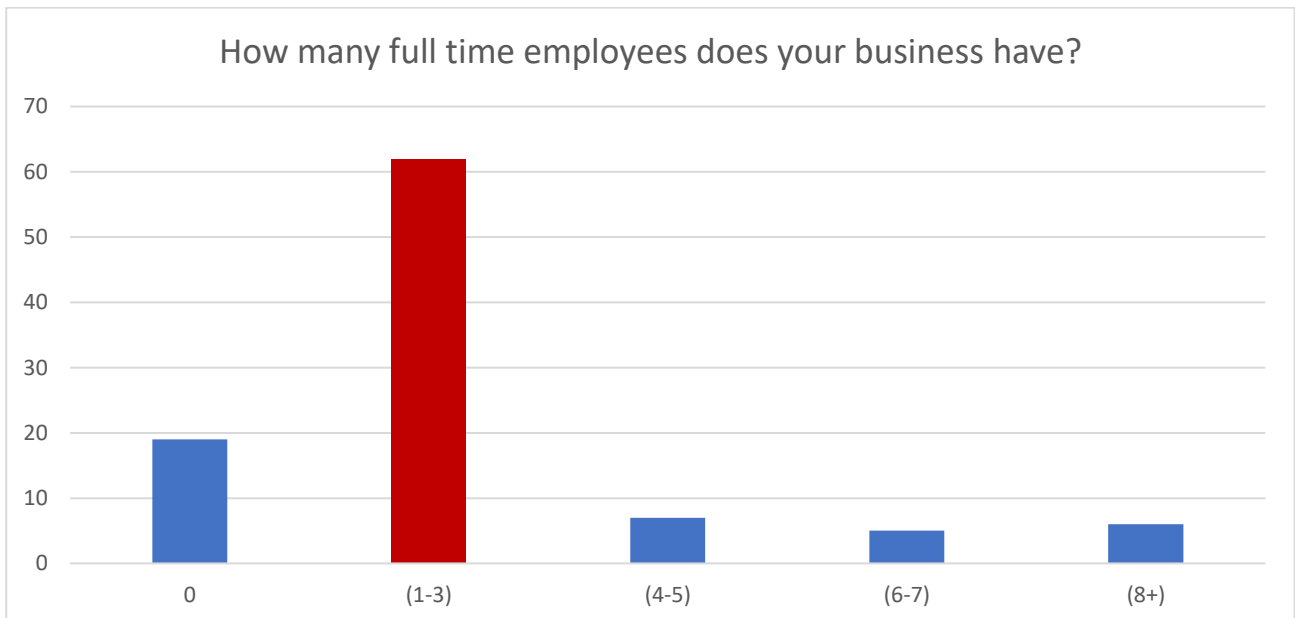


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Appendix I : Survey Data

Question 1.5: How many full-time employees does your business have?

Employees	Median	Respondents	Total
0	0	19	0
1-3	2	62	124
4-5	4.5	7	31.5
6-7	6.5	5	32.5
8+	8.5	6	51
		99	239
			2.414



Methodology:

A median figure in employees has been used for each option. This gave a total multiplied by respondent numbers. This was then divided by the number of respondents to give the average overall.

Basic Analysis:

Specialist pet centres are employers of a large number of people across the country. Should a considerable number of businesses become insolvent these employees and business owners may become a welfare state burden as a result.

Extrapolation:

Full Time Employees	No of Businesses	Total
2,411	979	2,359

An estimated 2,359 people are employed full-time in specialist pet centres across the UK. For the purpose of calculations a full time employee will be considered to work 40 hours per week at the national living wage of £9.50

Employees	Hourly Rate	Hours per Week	Total
2359	£9.50	40	£896,420.00

2,359 full-time employees working 40hrs per week will see an estimated weekly wage bill of £896,420

Weekly Wages	Weeks in year	Total
£896,420	52	£46,413,840.00

A total estimated annual wage bill of £46,413,840.00

This is assuming all staff members are paid the living wage. It stands to reason supervisors, assistant managers and managers could receive considerably more than this.

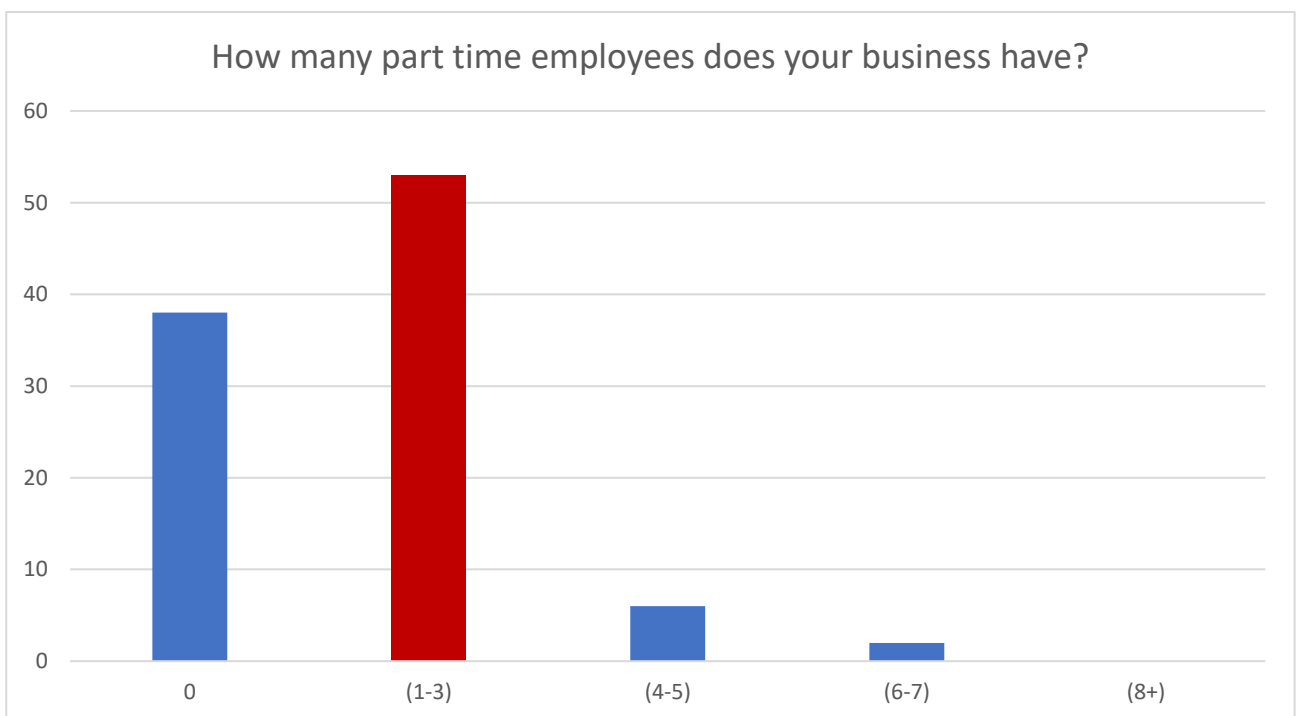
The lowest 'income decile' of households of the United Kingdom in 2021 was £1,126 per annum. The full time specialist pet centre wage bill is equivalent to 41,220 households' contributions.

REPTA believes there are around 1,200 centres licensed to sell reptiles. Whilst the above figure will be used in the document body, it is worthy of note we believe the figure to be closer to £57.14 million per annum or 50,750 households' contributions.



Question 1.6: How many part time employees does your business have?

Employees	Median	Respondents	Total
0	0	38	0
1-3	2	53	106
4-5	4.5	6	27
6-7	6.5	2	13
8+	8.5	0	0
		99	146
			1.4747



Methodology:

A median figure in employees has been used for each option. This gave a total multiplied by respondent numbers. This was then divided by the number of respondents to give the average overall.

Basic Analysis:

Specialist pet centres are employers of a large number of people across the country. Should large numbers of businesses become insolvent these employees and business owners may become a welfare state burden as a result.



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Extrapolation:

Part Time Employees	No of Businesses	Total
1,439	979	1,439

An estimated 1,439 people are employed part-time in specialist pet centres across the UK. For the purpose of calculations a full time employee will be considered to work 20 hours per week at the national living wage of £9.50

Employees	Hourly Rate	Hours per Week	Total
1,439	£9.50	20	£273,410.00

1,439 part-time employees working 20hrs per week will see an estimated weekly wage bill of £896,420

Weekly Wages	Weeks in year	Total
£273,410.00	52	£14,217,320.00

A total estimated annual wage bill of £14,217,320.00

This is working on all staff members being paid the living wage. It stands to reason supervisors, assistant managers and managers could receive considerably more than this.

The lowest income decile of households of the United Kingdom in 2021 was £1,126 per annum. The part time specialist pet centre wage bill is equivalent to 12,626 households' contributions.

Consolidation of question 1.5 and 1.6:

Total Wages Full-Time	Total Wages Part-Time	Total Wage bill
£46,413,840.00	£14,217,320.00	£60,631,160

Total estimated annual wage bill for both full-time and part-time staff is £60.63 million

The lowest income decile of households of the United Kingdom in 2021 was £1,126 per annum. The total specialist pet centre wage bill is equivalent to 53,846 households' contributions.

REPTA believes there are around 1,200 centres licensed to sell reptiles. Whilst the above figure will be used in the document body, it is worthy of note we believe the figure to be closer to £74.56 million per annum or 66,200 households' contributions.

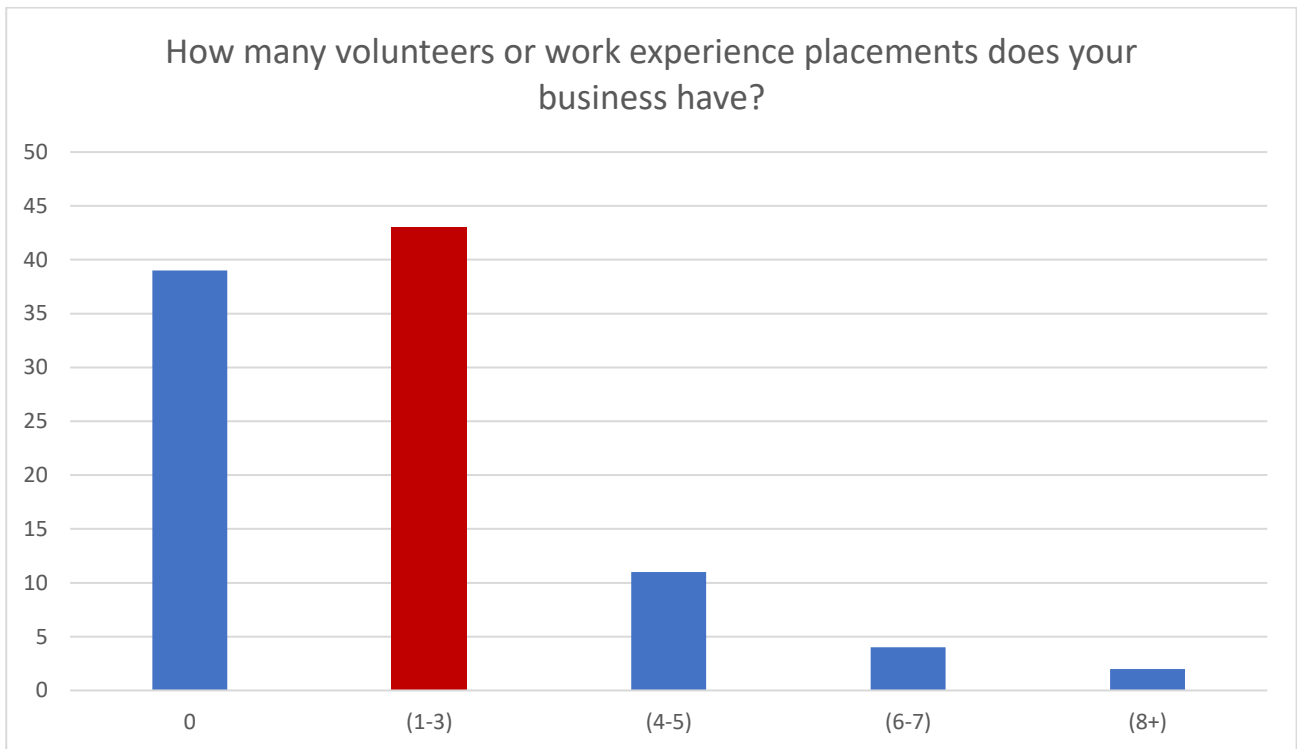


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Question 1.7: How many volunteers or work experience placements does your business have?

volunteer / p-ment	Median	Respondents	Total
0	0	39	0
1-3	2	43	86
4-5	4.5	11	49.5
6-7	6.5	4	26
8+	8.5	2	17
		99	178.5
			1.803



Methodology:

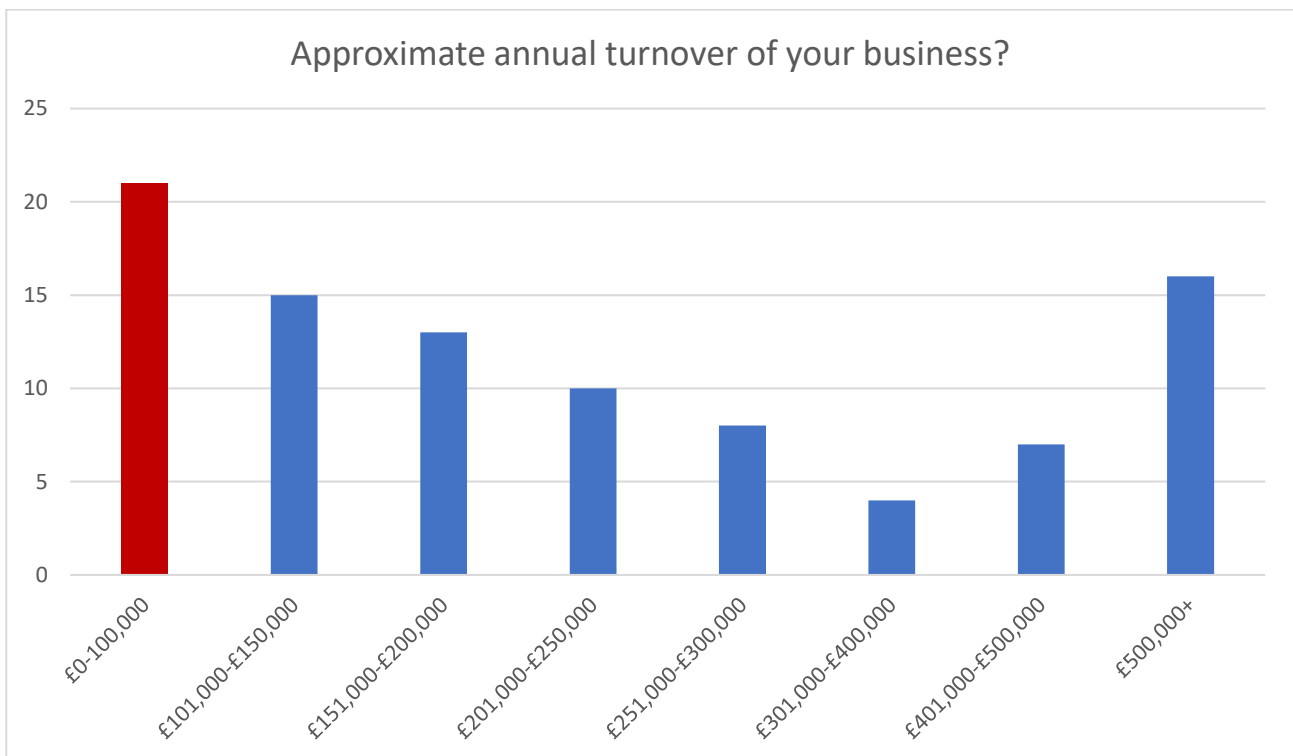
A median figure in volunteers / placements has been used for each option. This gave a total multiplied by respondent numbers. This was then divided by the number of respondents to give the average overall.

Basic Analysis:

Specialist pet centres give young people and those in education a chance to develop key skills when working with animals. These businesses are pivotal in helping develop key skills of animal managers, veterinarians, zoo keepers and naturalists of the future.

Question 2.2: What is the approximate annual turnover of your business?

Turnover	Median	Respondents	Total
£0-100,000	£50,000	21	£1,050,000
£101,000-150,000	£125,500	15	£1,882,500
£151,000-200,000	£175,500	13	£2,281,500
£201,000-250,000	£225,500	10	£2,255,000
£251,000-300,000	£275,500	8	£2,204,000
£301,000-400,000	£350,500	4	£1,402,000
£401,000-500,000	£450,500	7	£3,153,500
£501,000+	£550,000	16	£8,800,000
		94	£23,028,500
			£244,984.04



Methodology:

A median figure in pound sterling has been used for each option. This gave a total multiplied by respondent numbers. This was then divided by the number of respondents to give the average overall.



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Basic Analysis:

It became apparent when communicating with businesses the highest integer of £501,000+ was not high enough. Businesses have stated in some cases their turnover to exceed £1,000,000 per annum. As a result this gives a low flow average with the highest performing businesses annual figures curtailed to £550,000 (the median used for highest integer). REPTA would therefore conclude the median turnover of specialist pet centres in the United Kingdom to be significantly higher than figures used here.

Extrapolation:

Median Turnover	No of Businesses	Total
£244,984.04	979	£239,839,375.16

The total estimated turnover of businesses licensed to sell reptiles is £239.84 million. REPTA believes this is a low estimate with the number of centres to be closer to 1,200. This would see it rise to £293.98 million per annum.

Other factors that must be considered when assessing the overall size of the industry are online businesses selling reptile related equipment and feeds (and estimate of 33% of total turnover from a major reptile wholesaler via personal communication). Also there are non specialist pet centres that will sell reptile related products and feeds. This will include major chain stores such as Pets at Home and others.

We do not have a meaningful data set to extrapolate out on for non specialist stores. To make allowance for online specialist businesses using information communicated via specialist wholesalers

Total Turnover	Online Specialist multiplier	Total turnover
£239,839,375.16	x 1.33	£318,986,368.96

Again, with the figure being 1,200 centres this would raise to £390.99 million per annum.

When considering the vast network of non-specialist chain stores selling reptile related products and feeds REPTA feels it can safely estimate a total annual industry turnover to be close to £500 million pounds.

There are vectors for income we cannot adjudge due to lack of data such as the production of captive bred stock by private breeders which may be purchased by specialist pet centres or indeed that they have produced themselves. This further increases the size of the industry.

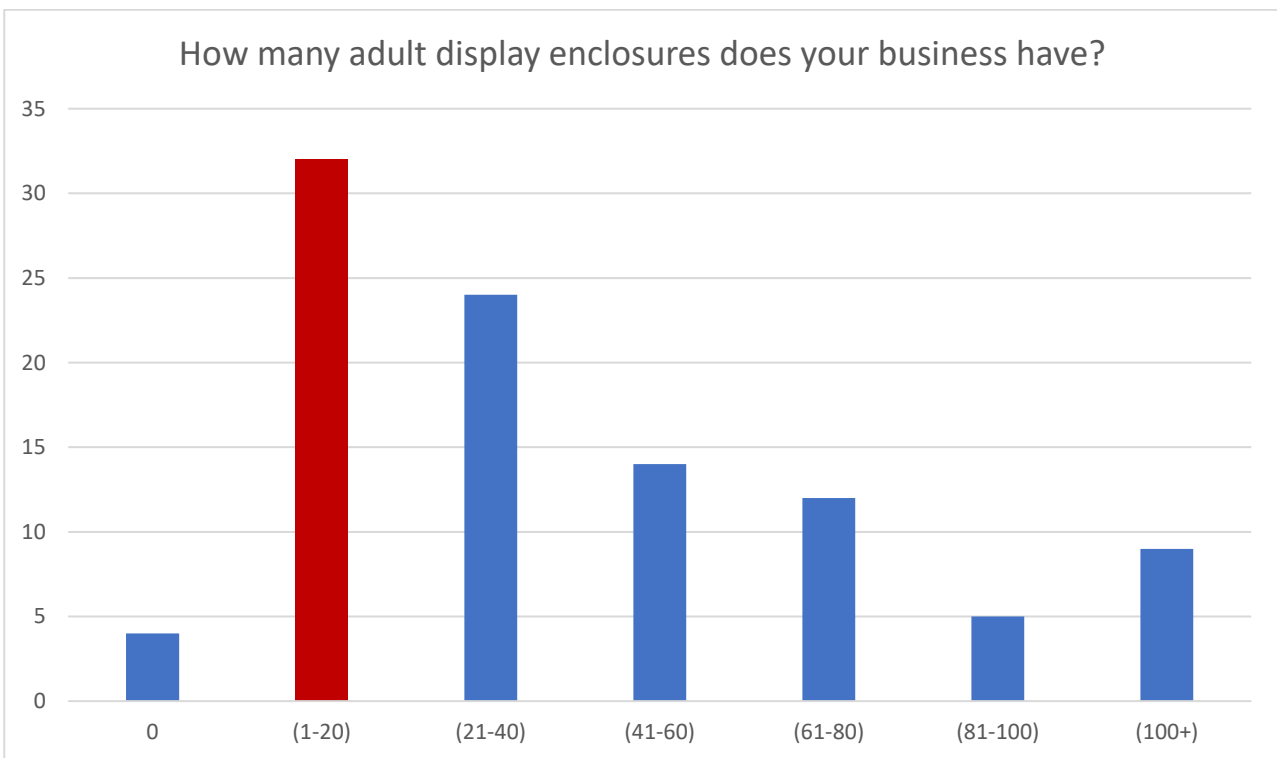


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Question 2.3: How many adult display enclosures does your business have?

Enclosures	Median	Respondents	Total
0	0	4	0
1-20	10.5	32	336
21-40	30.5	24	732
41-60	50.5	14	707
61-80	70.5	12	846
81-100	90.5	5	452.50
100+	110	9	990
		100	4063.5
			40.63



Methodology:

A median figure for adult enclosures has been used for each option. This gave a total multiplied by respondent numbers. This was then divided by the number of respondents to give the average overall.

Basic Analysis:

Specialist pet centres have on average 41 adult enclosures on display in their store from which to sell their livestock.

Extrapolation:

Average Centre	No of shops	Total
41	979	40,139

There are an estimated 40,139 adult display enclosures across the specialist pet centre network. Pet centres may co-habit their animals. Species such as Bearded Dragons when young are stocked at densities of up to 10 animals per enclosure. Some species however are solitary. REPTA has used the metric of 2 animals per enclosure as the average across the UK.

Enclosures	Density	Total
40,139	2 per enclosure	80,278

REPTA believes this is a low estimate for the number of animals in adult display enclosures across the UK. REPTA estimates the number of licensed pet centres selling reptiles to be closer to 1,200 which would see the total rise to 98,400.

These figures are pertinent to be able to ascertain risk to said number of animals should businesses begin to fail in large numbers. What is the impact to the animal welfare state in this situation?



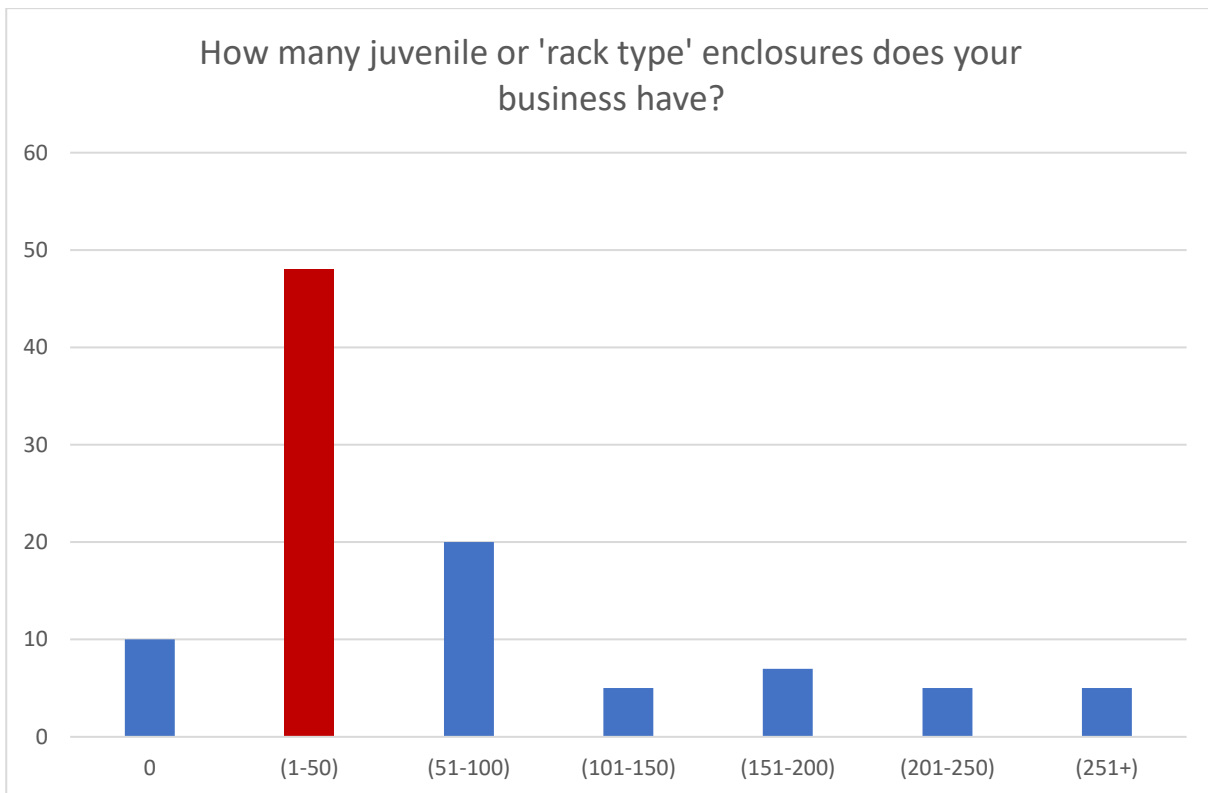


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Question 2.4: How many juvenile or 'rack type' enclosures does your business have?

Juvenile or rack type	Median	Respondents	Total
0	0	10	0
1-50	25.5	48	1224
51-100	75.5	20	1510
101-150	125.5	5	627.5
151-200	175.5	7	1228.5
201-250	225.5	5	1127.5
250+	275	5	1375
		100	7092.5
			70.93



Methodology:

A median figure for juvenile or 'rack type' enclosures has been used for each option. This gave a total multiplied by respondent numbers. This was then divided by the number of respondents to give the average overall.

Basic Analysis:

Specialist pet centres have on average 71 juvenile or 'rack type' enclosures in each store.

Extrapolation:

Average Centre	No of shops	Total
71	979	69,509

There are an estimated 69,509 juvenile or 'rack type' enclosures across the specialist pet centre network. These styles of enclosures are usually single occupancy and therefore no factoring up is required.

REPTA believes this is a low estimate for the number of animals in adult display enclosures across the UK. REPTA estimates the number of licensed pet centres selling reptiles to be closer to 1,200 which would see the total rise to 85,200

These figures are pertinent to be able to ascertain risk to said number of animals should businesses begin to fail in large numbers. What is the impact to the animal welfare state in this situation?



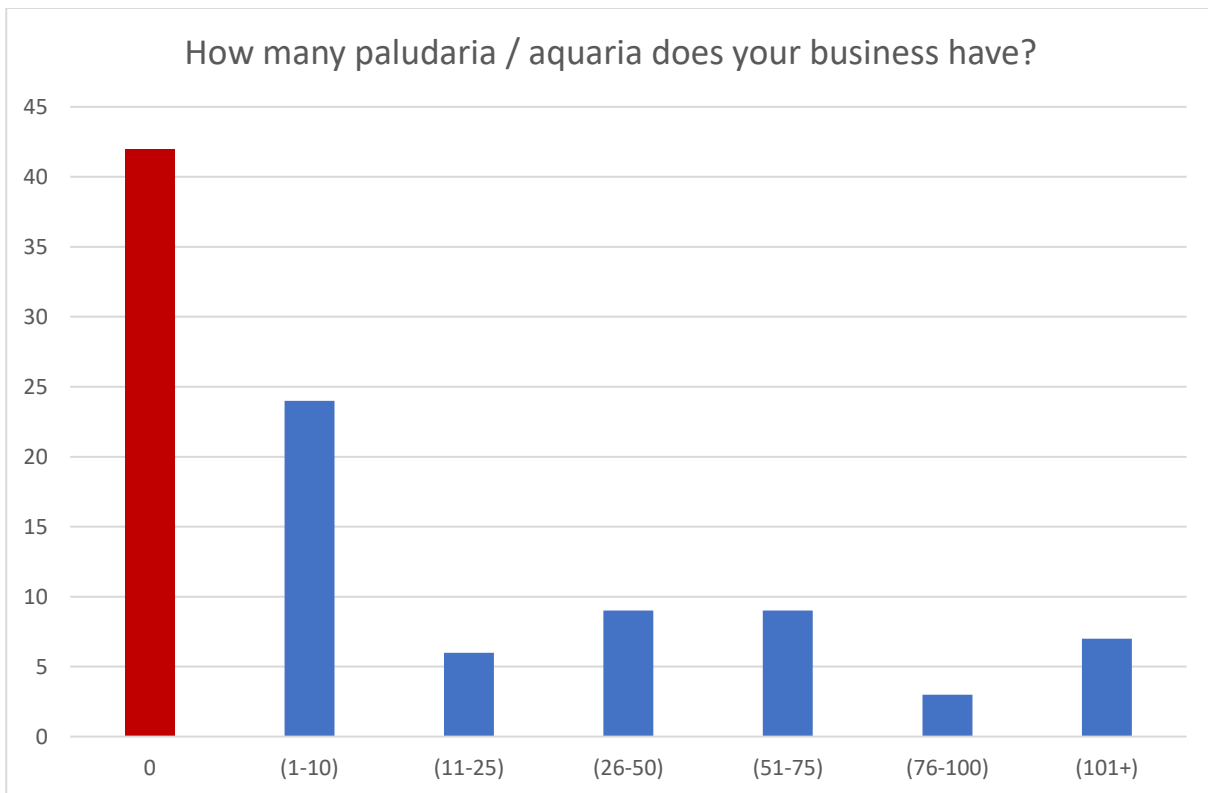


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Question 2.4: How many paludaria / aquaria does your business have?

Paludaria / Aquaria	Median	Respondents	Total
0	0	42	0
1-10	5.5	24	132
11-25	18	6	108
26-50	37.5	9	337.5
51-75	63	9	567
76-100	88	3	264
100+	110	7	770
		100	2178.5
			21.78



Methodology:

A median figure for paludaria / aquaria has been used for each option. This gave a total multiplied by respondent numbers. This was then divided by the number of respondents to give the average overall.

Basic Analysis:

Specialist pet centres have on average 22 paludaria / aquaria in each store.



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Extrapolation:

Average Centre	No of shops	Total
22	979	21,538

There are an estimated 21,538 paludaria / aquaria across the specialist pet centre network. These styles of enclosures are mainly used for tropical frogs, toads, salamanders, newts, and geckos. These animals are usually kept at density in colonies in display type enclosures. REPTA has used a metric of 3 animals per enclosure.

Paludaria / Aquaria	Density	Total
21,538	3	64,614

REPTA believes this is a low estimate for the number of animals in paludaria / aquaria across the UK. REPTA estimates the number of licensed pet centres selling reptiles to be closer to 1,200 which would see the total rise to 79,200.

These figures are pertinent to be able to ascertain risk to said number of animals should businesses begin to fail in large numbers. What is the impact to the animal welfare state in this situation?

Consolidation of questions 2.3, 2.4 and 2.5:

The total estimated number of animals in specialist pet centres across the UK.

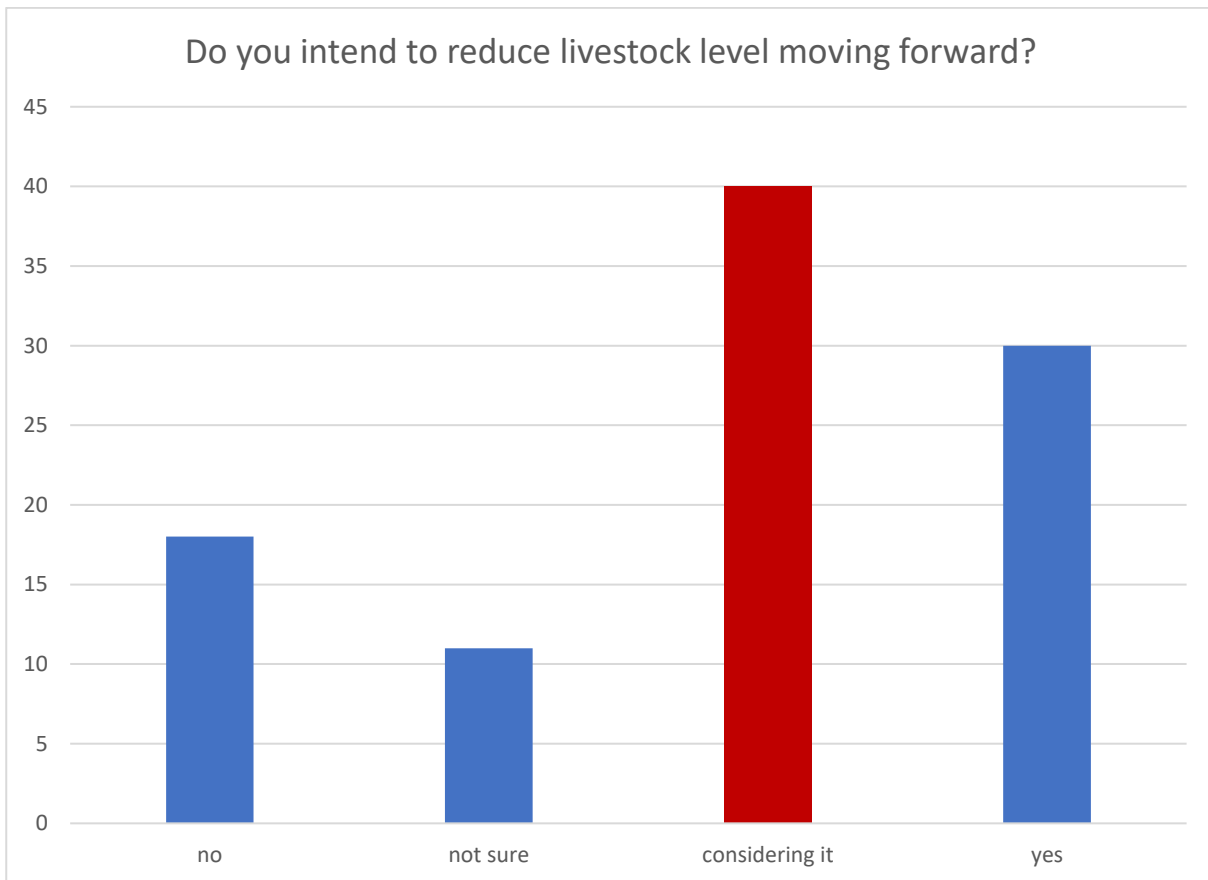
Adult	Juvenile	Paludaria	Total
80,278	69,509	64,614	214,401

An estimated population of reptiles, amphibians, and invertebrates in specialist pet centres of 214,401 animals. This figure will be referenced in the document, but REPTA feels this is a low estimate with the figure likely to be closer to 263,000.

NB: Some centres will also sell fish; this must be taken into consideration. Certain centres will sell multiple groups of animal not just reptiles, amphibians, and invertebrates. Some of the results that list higher numbers of Paludaria / aquaria may also be aquarist centres.

Question 3.3: Do you intend to reduce livestock levels moving forward?

Response	Respondents	% of respondents
No	18	18.18%
Not Sure	11	11.11%
Considering it	40	40.40%
Yes	30	30.30%
	99	70.70%



Methodology:

We took the number of respondents for each response divided by the total number for respondents.

Basic Analysis:

70.70% of pet centre owners are considering or will be reducing livestock levels as a result of the energy and cost-of-living crises.

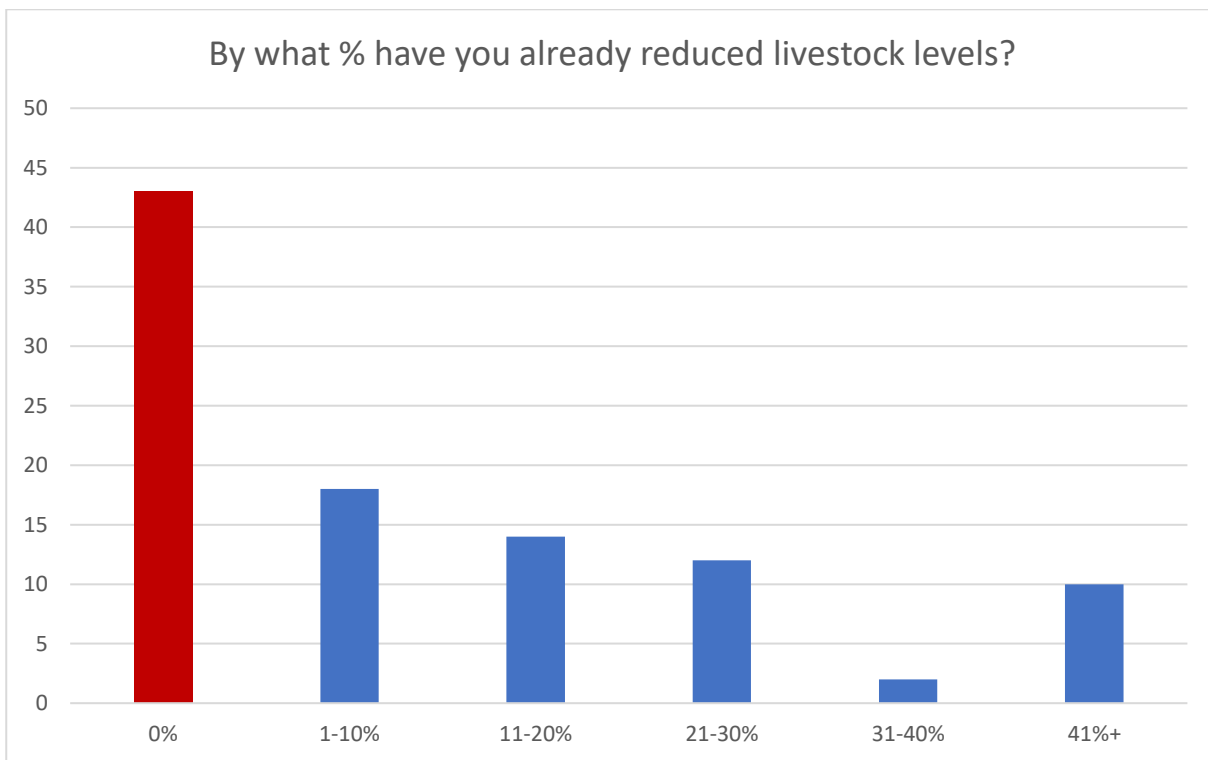


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Question 3.4: If you have already taken steps to reduce livestock levels by what % have you reduced them?

Percentage	Median	Respondents	Total
0%	0%	43	0
1-10%	5.5%	18	99
11-20%	15.5%	14	217
21-30%	25.5%	12	306
31-40%	35.5%	2	71
41%+	45%	10	450
		99	1143
			11.54%



Methodology:

A median figure for percentage of reduction has been used for each option. This gave a total multiplied by respondent numbers. This was then divided by the number of respondents to give the average overall.

Basic Analysis:

Whilst most shops have decided to maintain their current livestock levels over 10% of pet centres have reduced their livestock levels by over 40% because of the energy and cost-of-living crises.



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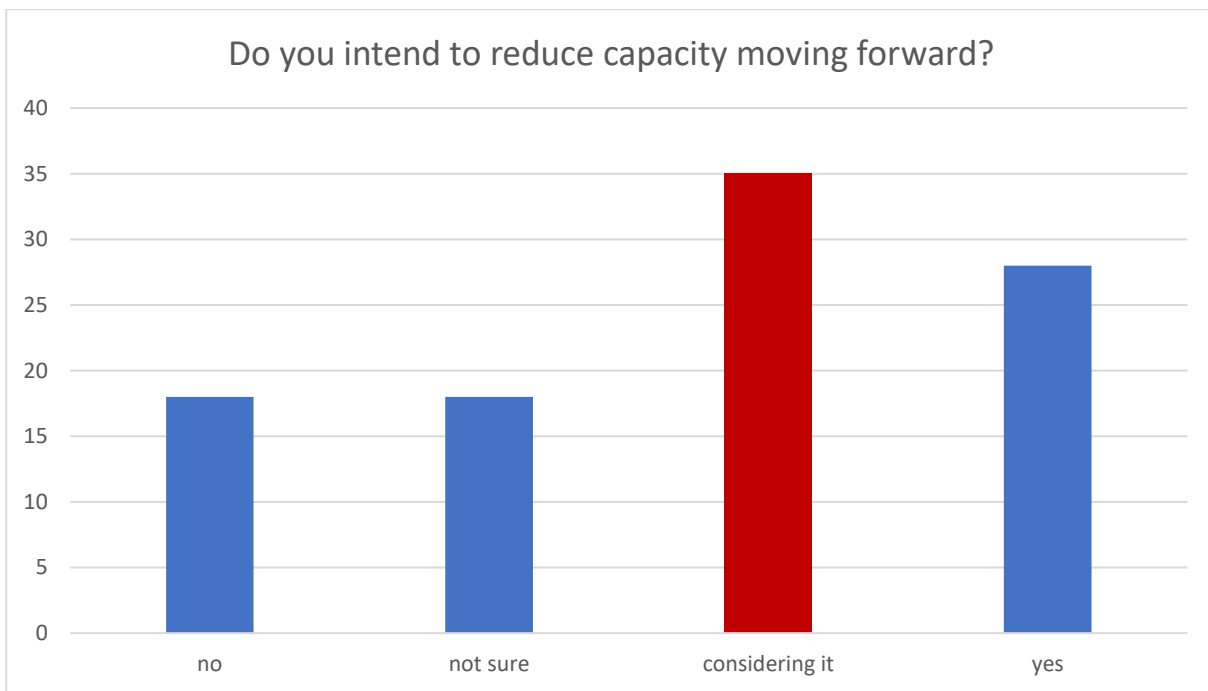
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Because of the large scale reductions of these shops it has raised the median reduction rate to 11.54%.

This information is pertinent as it illustrates a centres continued willingness to take in surrendered animals which will appear later in the dataset. With less livestock these centres are hoping to reduce maintenance bills as well as the outlay on the stock at the outset.

Question 3.5: Do you intend to remove capacity moving forward?

Response	Respondents	% of respondents
No	18	18.18%
Not sure	18	18.18%
Considering it	35	35.35%
Yes	28	28.28%
	99	63.63%



Methodology:

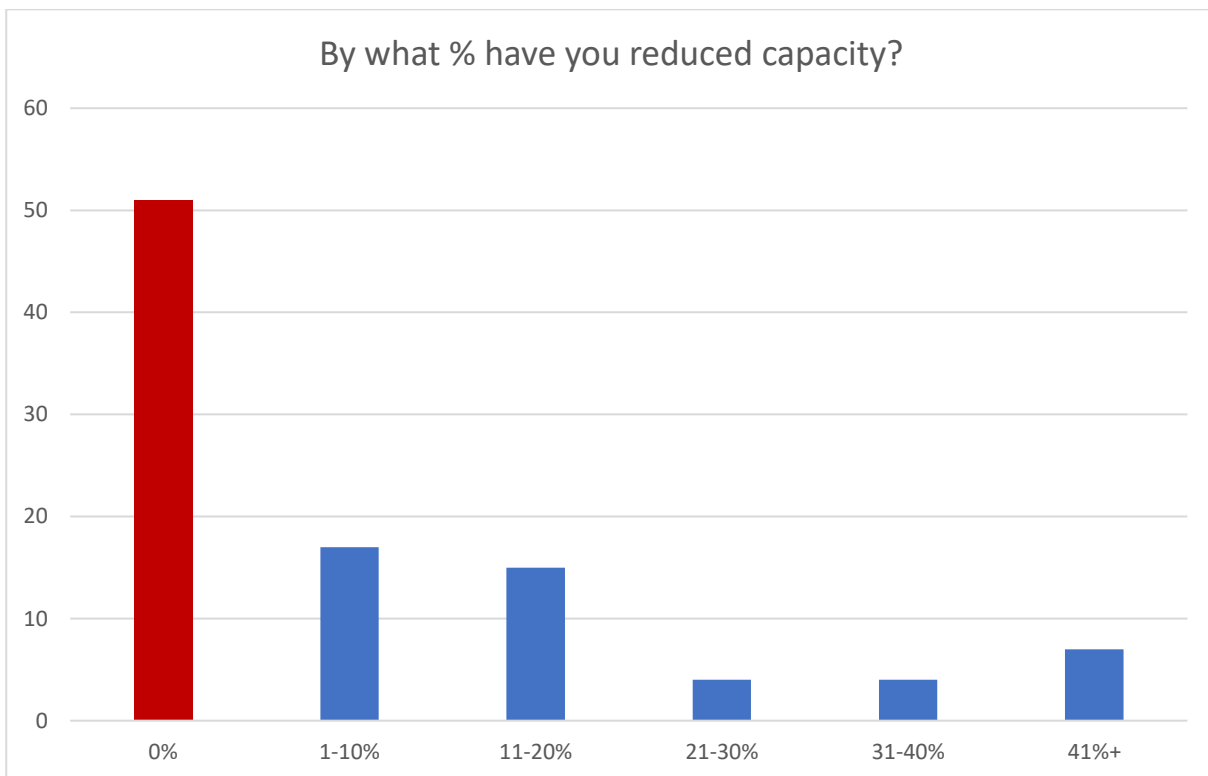
The number of respondents for each response divided by the total number for respondents.

Basic Analysis:

63.63% of pet centre owners are considering or will be reducing capacity as a result of the energy and cost-of-living crises.

Question 3.6: If you have already taken steps to reduce capacity by what % have you reduced them?

Percentage	Median	Respondents	Total
0%	0%	51	0
1-10%	5.5%	17	93.50
11-20%	15.5%	15	232.50
21-30%	25.5%	4	102
31-40%	35.5%	4	142
40%+	45%	7	315
		98	885
			9.04%



Methodology:

A median figure for percentage of reduction has been used for each option. This gave a total multiplied by respondent numbers. This was then divided by the number of respondents to give the average overall.

Basic Analysis:

Whilst most shops have decided to maintain their current capacity, some have reduced capacity by over 40%.



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Capacity is infrastructure. Pet centres are removing enclosures in an attempt to save money because of the modern cost of energy. This has a palpable impact on their ability to accept surrendered animals at the business. The immediate knock on to this is the reptile re-homing network which is already over capacity. This has a demonstrable deleterious effect on animal welfare.

Extrapolation:

Using data from question 2.3, 2.4 and 2.5:

The number of animals in specialist pet centres across the UK.

Adult	Juvenile	Paludaria	Total
80,278	69,509	64,614	214,401

If capacity is reduced by 9.04%

Capacity	% reduction	New Capacity	Amount lost
214,401	9.04	195,019	19,382

19,382 fewer animals can be maintained by the specialist pet centre infrastructure. Businesses will prioritise animals they can sell for a profit over surrendered animals. The maximum recorded intake per annum of the National Centre for Reptile Welfare is around 2,000 animals. With pet centres reducing just 9.04% of their capacity this is almost ten times the annual intake of N.C.R.W.

As the economic problems deepen over 2023 REPTA expects these capacity reduction figures to increase further. Some centres have already reduced livestock capacity by 40% or more.



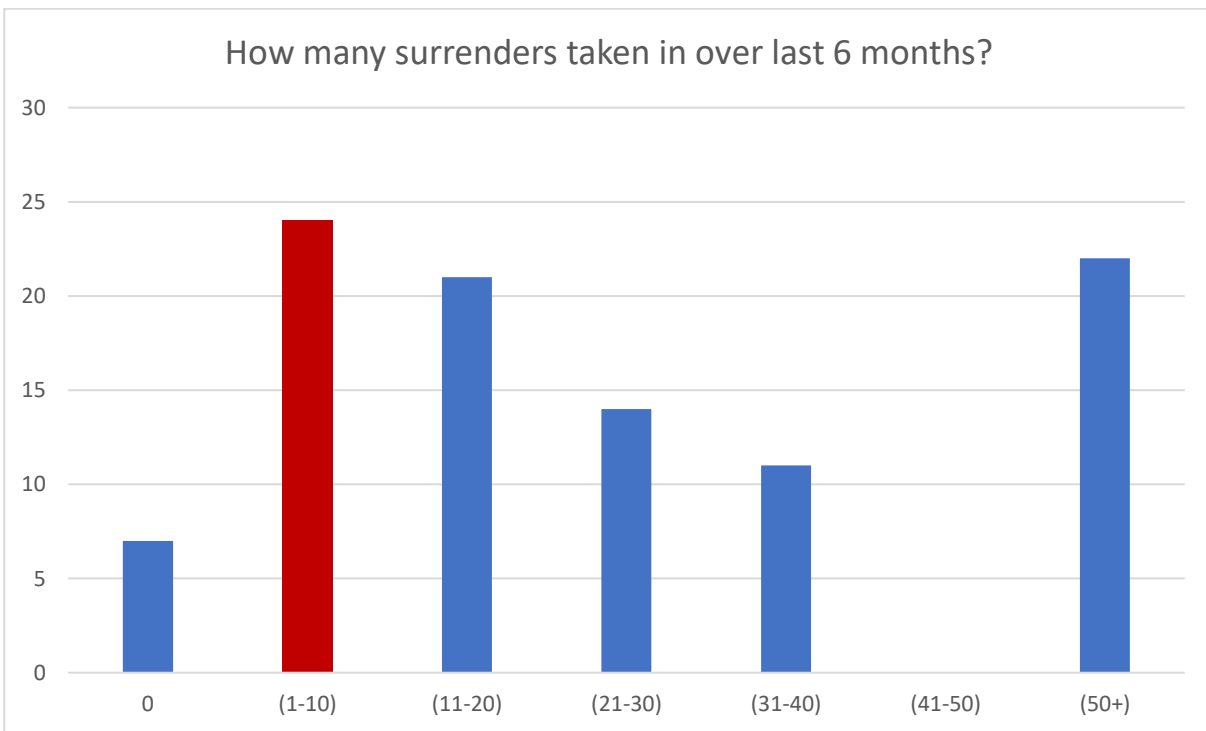


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Question 4.1: How many re-home, surrendered or rescue animals have your business taken in over the past six months?

Number	Median	Respondents	Total
0	0	7	0
1-10	5.5	24	132
11-20	15.5	21	325.5
21-30	25.5	14	357
31-40	35.5	11	390.50
41-50	45.5	0	0
50+	55	22	1210
		99	2415
			24.39



Methodology:

A median figure for surrender intake has been used for each option. This gave a total multiplied by respondent numbers. This was then divided by the number of respondents to give the average overall.

Basic Analysis:

As an average specialist pet centres have taken in 24.4 animals each in the last 6 months

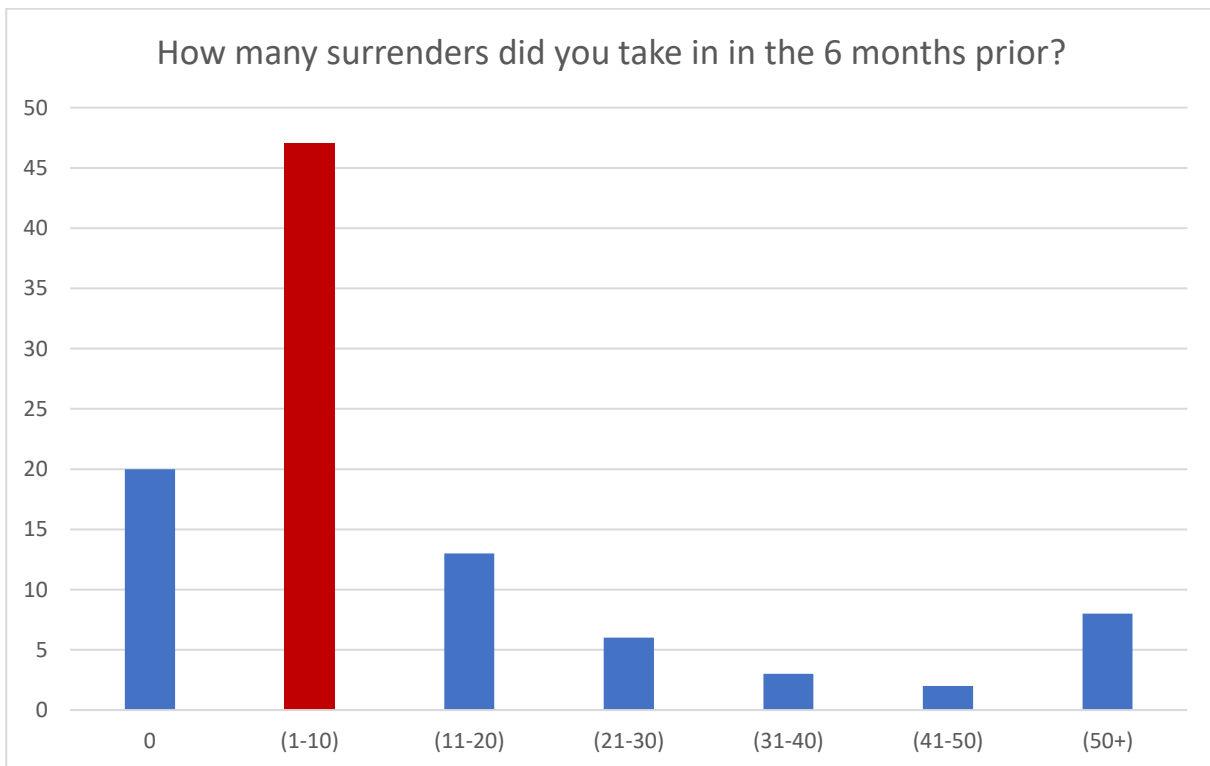


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Question 4.2: How many re-home, surrendered or rescue animals have your business taken in the six months prior to that?

Number	Median	Respondents	Total
0	0	20	0
1-10	5.5	47	258.5
11-20	15.5	13	201.5
21-30	25.5	6	153
31-40	35.5	3	160.5
41-50	45.5	2	91
50+	55	8	440
		99	1250.5
			12.63



Methodology:

A median figure for surrender intake has been used for each option. This gave a total multiplied by respondent numbers. This was then divided by the number of respondents to give the average overall.

Basic Analysis:

As an average specialist pet centres have taken in 12.63 animals each in the prior 6 months.



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Extrapolation:

Total surrender, re-home or rescue intake in the last 6 months

Intake in last 6 months	No of pet centres	Total
24.4	979	23,888

Total surrender, re-home or rescue intake in the 6 months prior

Intake in 6 months prior	No of centres	Total
12.63	979	12,365

Increase from previous figure

New Total	Divide by	Old Total	Equals	X100
23,888	/	12,365	1.9319	193.19%

Surrender, re-home and rescue intake work undertaken by specialist pet centres is up 193.19% on previous 6 months total.

REPTA believes there are 1,200 specialist pet centres licensed to sell reptiles, amphibians and arachnids. Whilst the % increase would remain the same the total intake currently would be estimated to be 29,280

Current Capacity

Adult	Juvenile	Paludaria	Total
80,278	69,509	64,614	214,401

Intake	Divide by	Capacity	Equals	X100
23,888	/	214,401	0.1114	11.14%

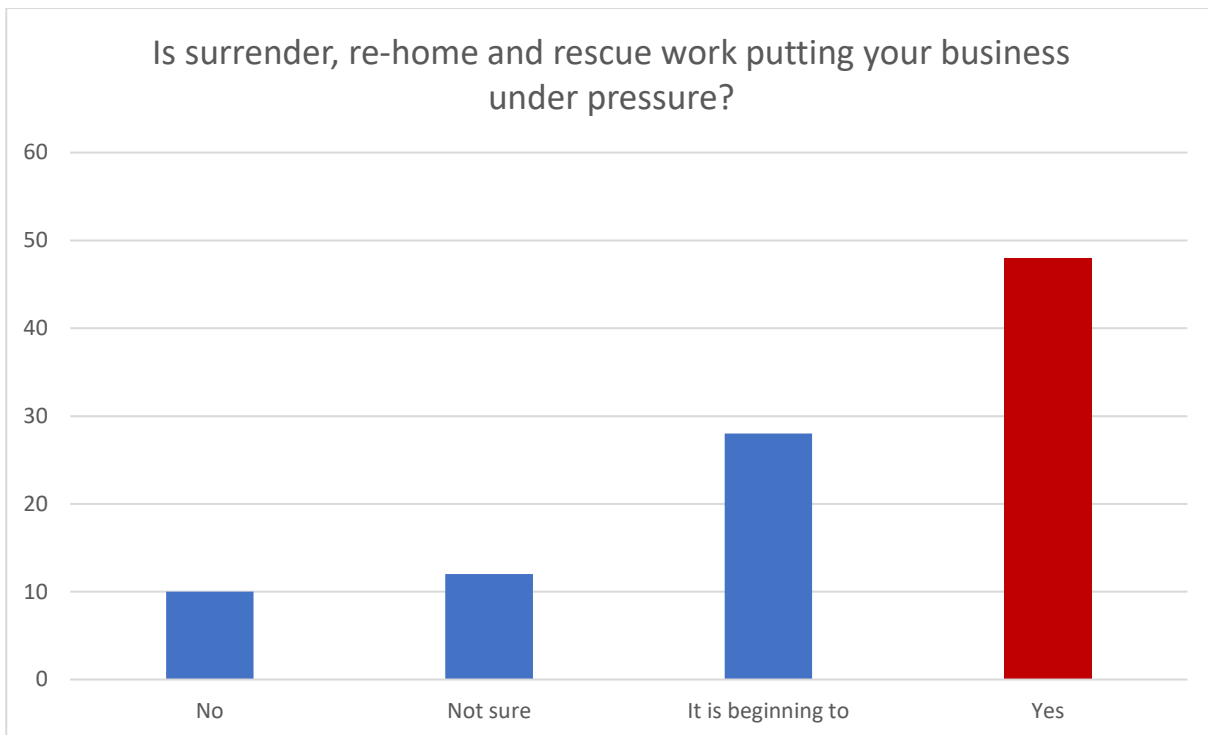
11.14% of total estimated capacity in specialist pet centres is currently occupied by surrender type animals. As pressure mounts on shops to make cost savings they are less likely to offer residence to needy animals prioritising profit making over altruistic endeavours.

Intake	Divide by	NCRW Capacity	Equals	X100
23,888	/	2000	11.944	1,194.4%

Current surrender intake over only the last six months is 1,194% the capacity of the National Centre for Reptile Welfare for an entire year.

Question 4.3: Is surrender, re-home and rescue work putting your business under pressure?

Response	Respondents	% of respondents
No	10	10.2%
Not sure	12	12.24%
It is beginning to	28	28.57%
Yes	48	48.97%
	98	77.54%

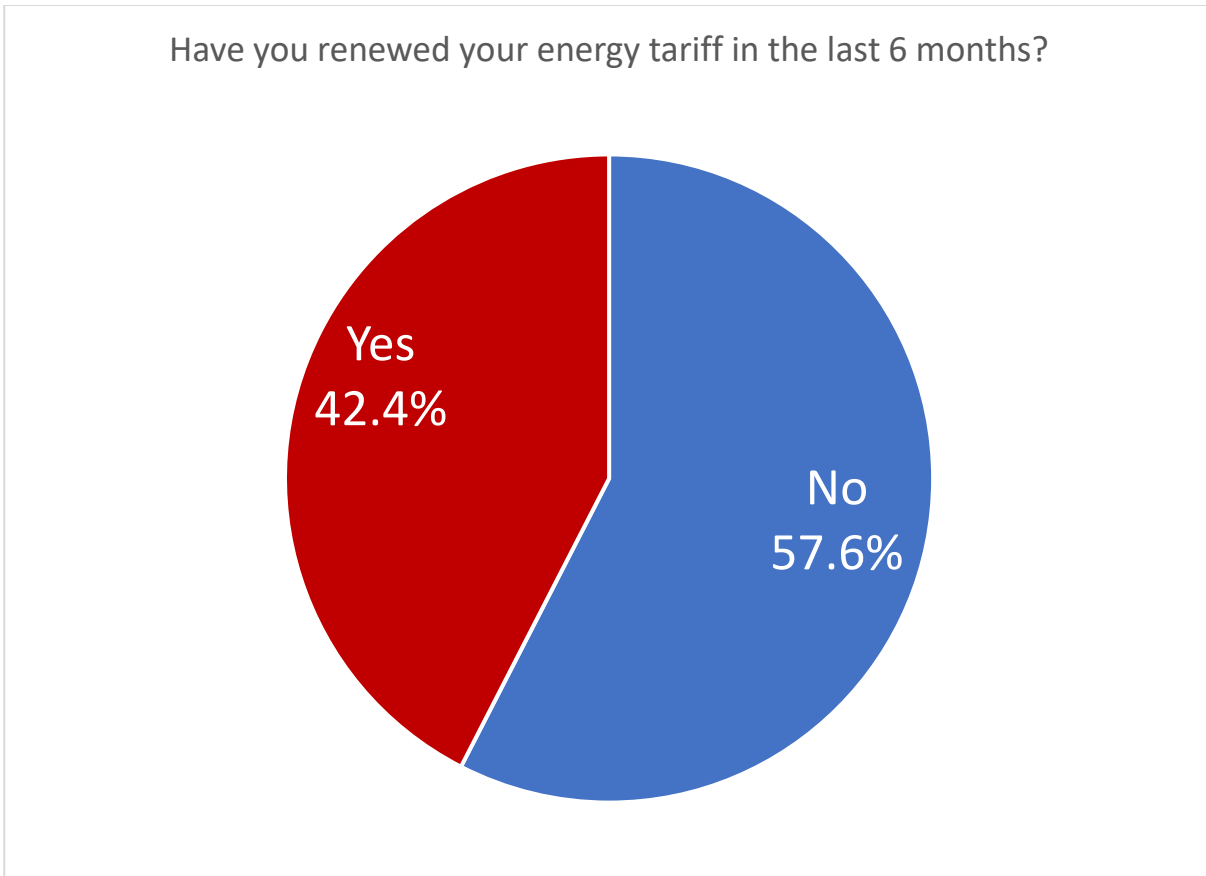


77.54% of pet centres are beginning to or are already feeling pressure is mounting on their business from surrender, re-home and rescue work. With depleted sales and rapidly increasing energy prices these centres are less likely to continue such work in the future.

These figures illustrate how instrumental specialist pet centres are to protecting the animal welfare state of the UK. Should these businesses begin to fail in large numbers this would have severe implications for the re-homing network of the UK.

Question 5.1: Have you renewed your energy tariff in the last 6 months?

Yes	No
42.4%	57.6%
42 respondents (99 total)	57 respondents (99 total)
An estimate of 419 pet centres	An estimate of 560 pet centres



REPTA set out to investigate energy price rise impact on specialist pet centres across the UK. Almost half of pet centres have had a renewal within the last 6 months. We will compare existing energy deals running into 2023, 2024 and 2025 and those that have renewed. To be able to illustrate impact we have also asked for previous tariff amount as well so we can calculate percentage increase.

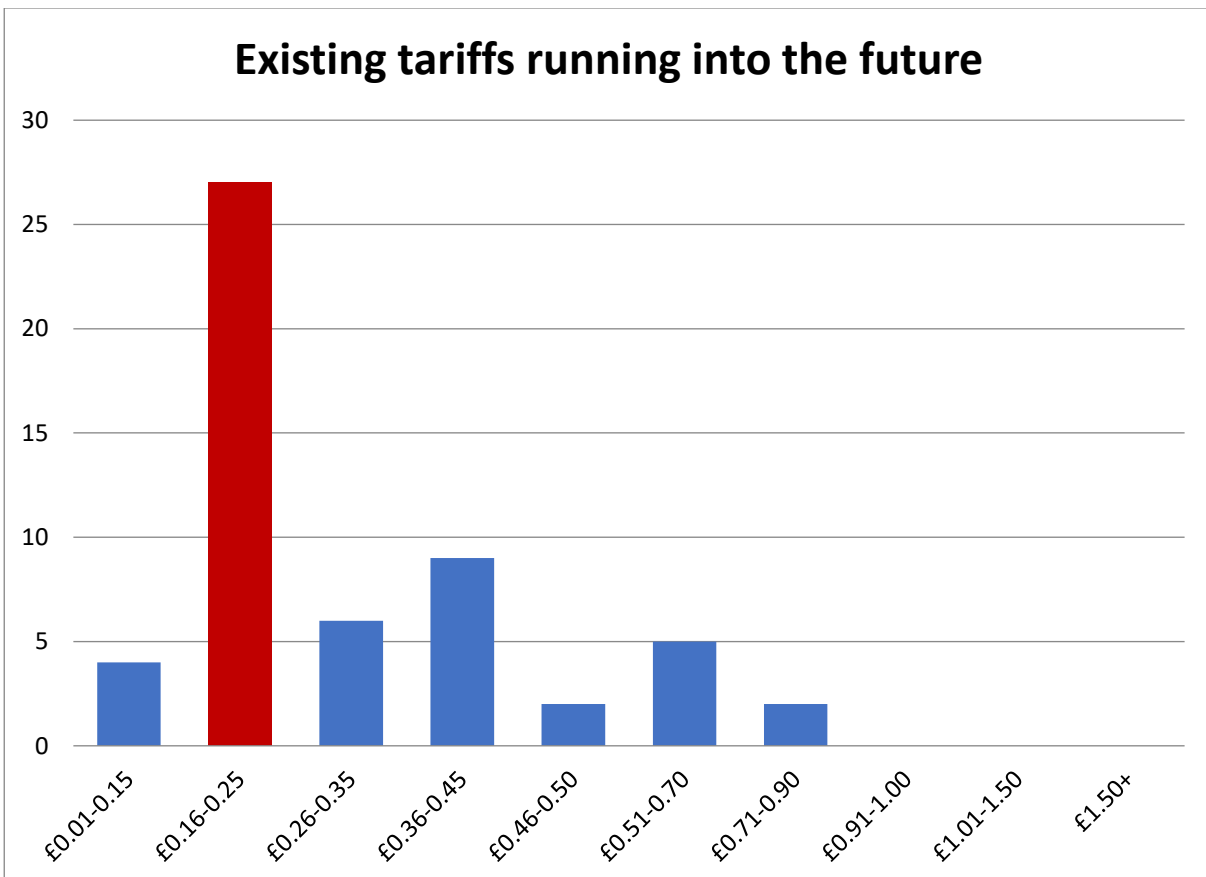


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Question 5.2: If you have not renewed what is your existing tariff running to the future 2023, 2024 or 2025?

Tariff	Median	Respondents	Total
£0.01-0.15	£0.08	4	0.32
£0.16-0.25	£0.205	27	5.535
£0.26-0.35	£0.305	6	1.83
£0.36-0.45	£0.405	9	3.645
£0.46-0.50	£0.480	2	0.96
£0.51-0.70	£0.650	5	3.025
£0.71-0.90	£0.850	2	1.61
£0.91-1.00	£0.955	0	0
£1.01-1.50	£1.255	0	0
£1.51+	£1.60	0	0
		55	16.92
			£0.3077kWh



Methodology:

A median figure for existing tariff has been used for each option. This gave a total multiplied by respondent numbers. This was then divided by the number of respondents to give the average overall.

Basic Analysis:

Existing tariffs that will continue into the foreseeable future is £0.3077kWh. The domestic cap (at £2,500 per annum) is £0.3400kWh.

Extrapolation:

Tariff	Usage per annum	Total
£0.3077	20,000 kWh	£6,154 per annum
£0.3077	40,000 kWh	£12,308 per annum
£0.3077	60,000 kWh	£18,462 per annum
£0.3077	80,000 kWh	£24,616 per annum
£0.3077	100,000 kWh	£30,770 per annum

REPTA has discovered through communicating with specialist pet centres usages up to and exceeding 100,000 kWh per annum. Pet centres come in all shapes and sizes so to use a median usage 50,000 kWh per annum will be used.

On a tariff of £0.3077, 50,000kWh will cost £15,385 per annum.

Energy Cost	Divide by	Turnover	Equals	X100
£15,385	/	£244,984.04	0.0628	6.28%

The accepted threshold for fuel poverty is 10% of income.

Existing tariffs that will continue into the foreseeable future are an estimated 6.28% of turnover. It is worth considering if these deals end in 2023 businesses may face even more aggressive pricing than seen in the recently renewed shops below.



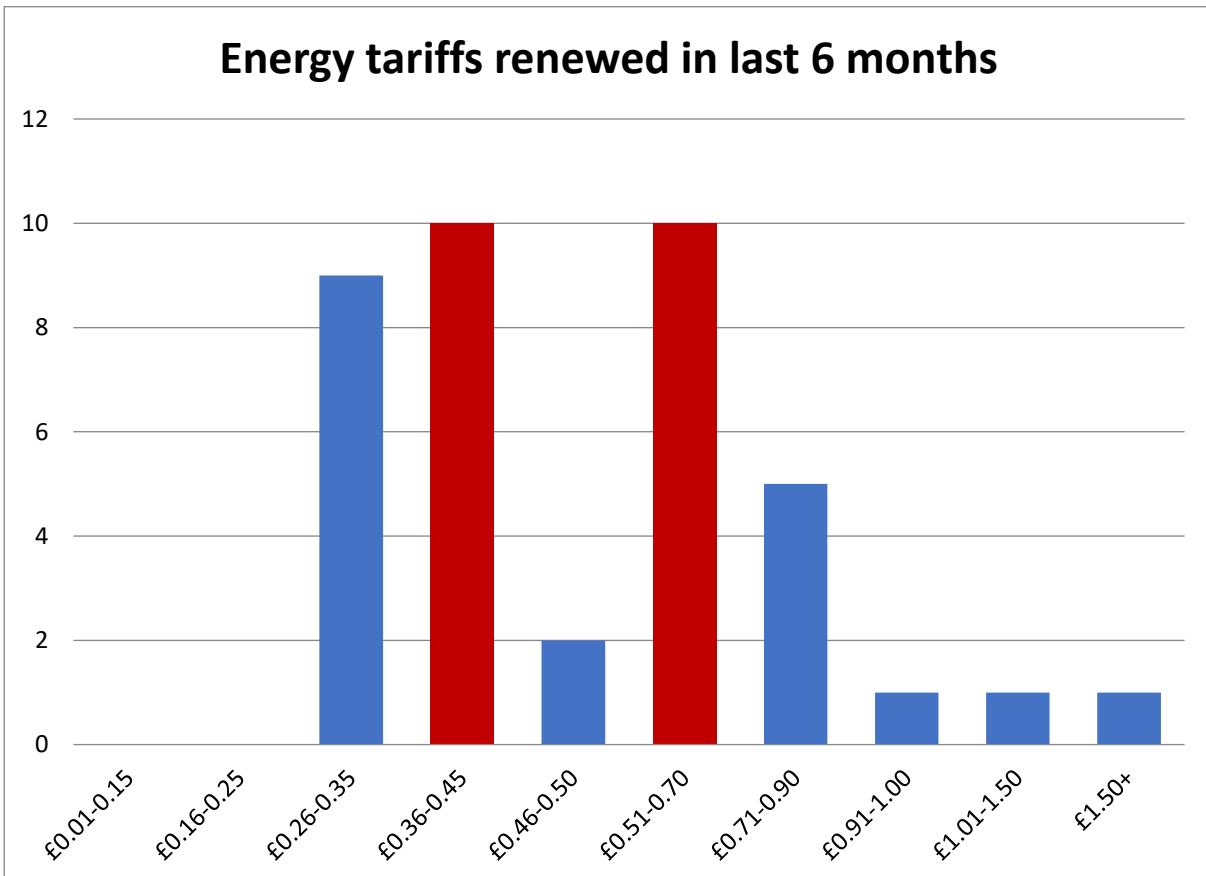


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Question 5.3: New tariffs negotiated within the last six months?

Tariff	Median	Respondents	Total
£0.01-0.15	£0.08	0	0
£0.16-0.25	£0.205	0	0
£0.26-0.35	£0.305	9	2.745
£0.36-0.45	£0.405	10	4.05
£0.46-0.50	£0.480	2	0.96
£0.51-0.70	£0.650	10	6.05
£0.71-0.90	£0.850	5	4.025
£0.91-1.00	£0.955	1	0.955
£1.01-1.50	£1.255	1	1.255
£1.51+	£1.60	1	1.60
		39	21.64
			£0.5549kWh



Methodology:

A median figure for existing tariff has been used for each option. This gave a total multiplied by respondent numbers. This was then divided by the number of respondents to give the average overall.

Basic Analysis:

Newly negotiated tariffs (within the last 6 months) are on average £0.5549kWh. The domestic cap (at £2,500 per annum) is £0.3400kWh.

Extrapolation:

Tariff	Usage per annum	Total
£0.5549	20,000 kWh	£11,098 per annum
£0.5549	40,000 kWh	£22,196 per annum
£0.5549	60,000 kWh	£33,294 per annum
£0.5549	80,000 kWh	£44,392 per annum
£0.5549	100,000 kWh	£55,490 per annum

REPTA has discovered through communicating with specialist pet centres usages up to and exceeding 100,000 kWh per annum. Pet centres come in all shapes and sizes so to use a median usage 50,000 kWh per annum will be used.

On a tariff of £0.5549, 50,000kWh will cost £27,745 per annum.

Energy Cost	Divide by	Turnover	Equals	X100
£27,745	/	£244,984.04	0.11325	11.325%

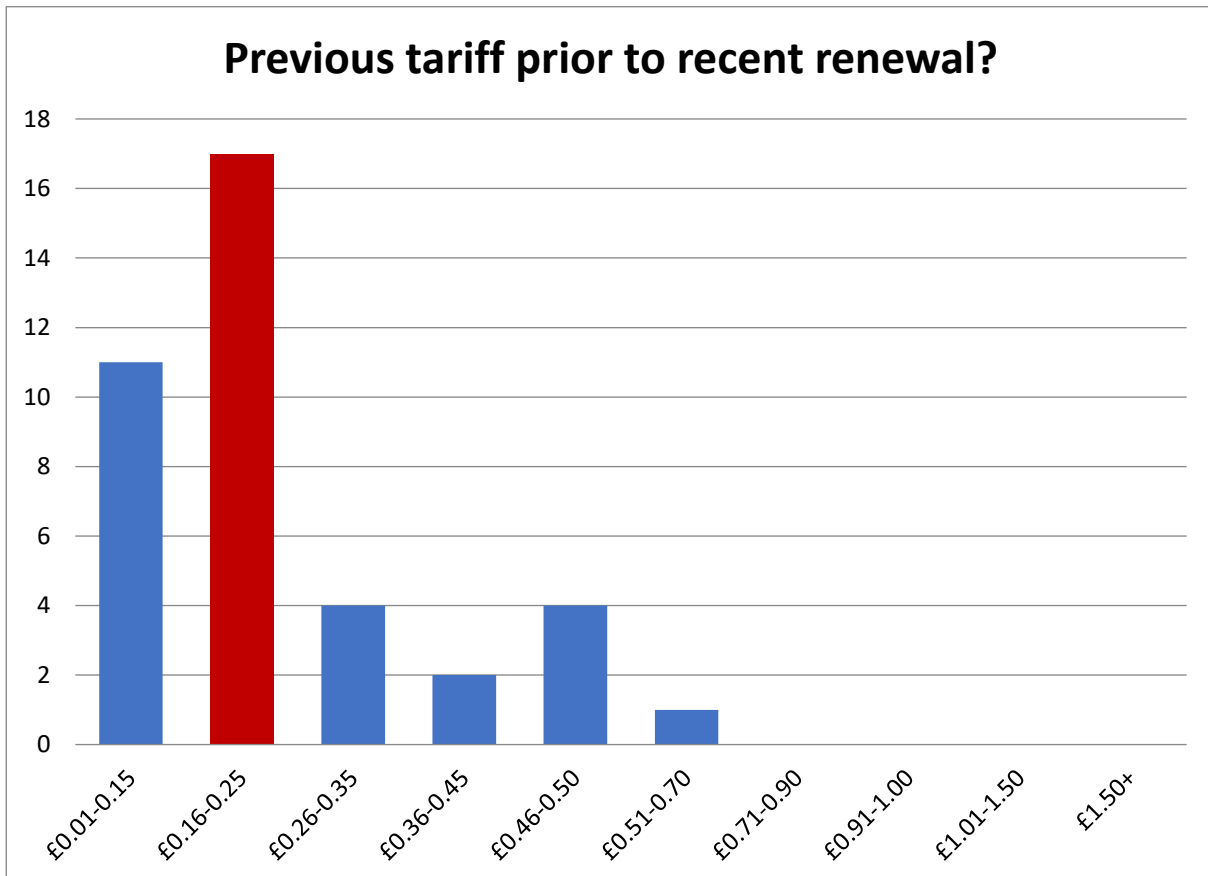
The accepted threshold for fuel poverty is 10% of income.

Tariffs renewed in the last 6 months are an estimated 11.325% of annual turnover. Even if turnover remains buoyant there is every possibility pet centres that have renewed in the last six months should be considered to be in a state of fuel poverty.



Question 5.4: Previous energy tariff prior to renewal?

Tariff	Median	Respondents	Total
£0.01-0.15	£0.08	11	0.88
£0.16-0.25	£0.205	17	3.485
£0.26-0.35	£0.305	4	1.12
£0.36-0.45	£0.405	2	0.66
£0.46-0.50	£0.480	4	1.52
£0.51-0.70	£0.650	1	0.455
£0.71-0.90	£0.850	0	0
£0.91-1.00	£0.955	0	0
£1.01-1.50	£1.255	0	0
£1.51+	£1.60	0	0
		39	8.12
			£0.2082kWh





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Methodology:

A median figure for existing tariff has been used for each option. This gave a total multiplied by respondent numbers. This was then divided by the number of respondents to give the average overall.

Basic Analysis:

Previous tariffs prior to renewal were on average £0.2082kWh. The domestic cap (at £2,500 per annum) is £0.3400kWh.

Extrapolation:

Tariff	Usage per annum	Total
£0.2082	20,000 kWh	£4,164 per annum
£0.2082	40,000 kWh	£8,328 per annum
£0.2082	60,000 kWh	£12,492 per annum
£0.2082	80,000 kWh	£16,656 per annum
£0.2082	100,000 kWh	£20,820 per annum

REPTA has discovered through communicating with specialist pet centres usages up to and exceeding 100,000 kWh per annum. Pet centres come in all shapes and sizes so to use a median usage 50,000 kWh per annum will be used.

On a tariff of £0.2082, 50,000kWh will cost £10,410 per annum.

Energy Cost	Divide by	Turnover	Equals	X100
£10,410	/	£244,984.04	0.11325	4.249%

The accepted threshold for fuel poverty is 10% of income.

Previous tariffs prior to renewal were an estimated 4.249% of annual turnover. All energy tariffs in recent memory spanning back over the last decade have either been around this level or lower. Specialist pet centres are totally reliant on affordable energy to remain viable. In the absence of such provision they will be forced into fuel poverty. There is no effective strategy to offset price rises to energy of this kind. Stark choices about cost cutting to staff level or capacity to house animals are the only way these shops can try to remain solvent. For many pet centres even such drastic changes may prove to be futile.

Consolidation of questions 5.2,5.3 and 5.4

Comparison of tariffs

Previous Tariff	Existing Tariff	New Tariff (last 6 months)
£0.2028kWh	£0.3077	£0.5499

Cost per annum in a pet centre using 50,000kWh

Previous Tariff	Existing Tariff	New Tariff (last 6 months)
£10,140	£15,385	£27,495

Percentage increase from previous tariff

Previous Tariff	Existing Tariff	New Tariff (last 6 months)
0%	+151.72% (47.79%)	+271.15% (164.12%)

Estimated annual energy bills are 271% higher on energy tariffs negotiated within the last 6 months.

The highest prices have been negotiated most recently with prices continuing to rise. This does create cause for concern regarding the efficacy of the government cap of £0.21kWh on the wholesale element of business energy bills. Whilst a certain amount of shift may be expected in other elements that make up the energy bill (environment duties, network costs, VAT etc) these should be relatively gentle changes. The single most volatile element of the bill would be the wholesale element. With this element capped at £0.21kWh how can price increases of 271.15% occur? Some prices submitted to this survey far exceed this with single unit prices reaching £0.90 - £1.60kWh. At £0.90kWh this is a 443.78% increase. At £1.60kWh this is a 788.95% increase.

A business paying £0.71-0.90kWh (5 in the survey) and using 50,000kWh will pay:

Tariff	Usage	Total per annum
£0.850 (Median of bracket)	50,000kWh	£42,500 (+419.13%)



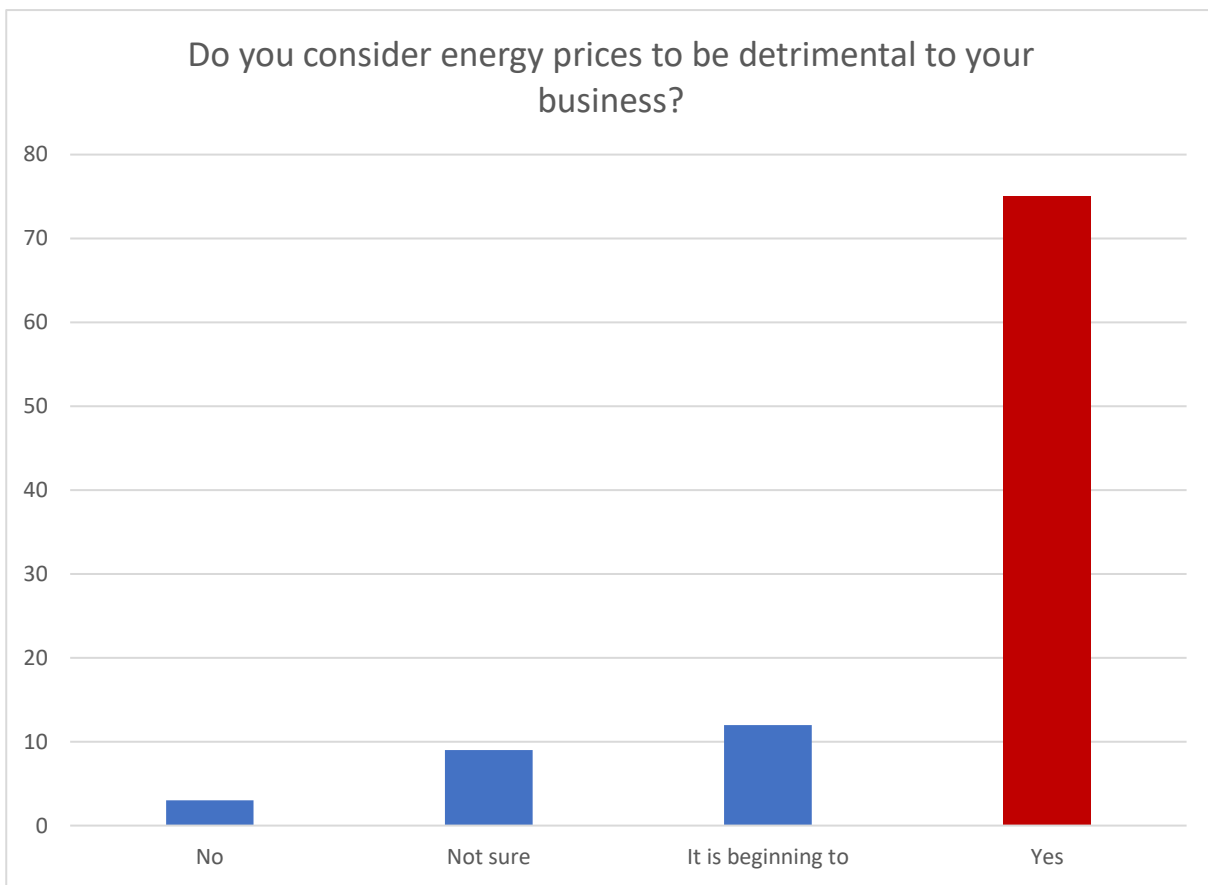


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Question 5.5: Do you consider energy prices to be detrimental to your business?

Response	Respondents	% of respondents
No	3	3.03%
Not sure	9	9.09%
It is beginning to	12	12.12%
Yes	75	75.75%
	99	87.87%



Methodology:

The number of respondents for each response divided by the total number for respondents.

Basic Analysis:

87.87% of pet centre owners are feeling that energy pricing is beginning to be detrimental or is highly detrimental to the immediate future of their business.

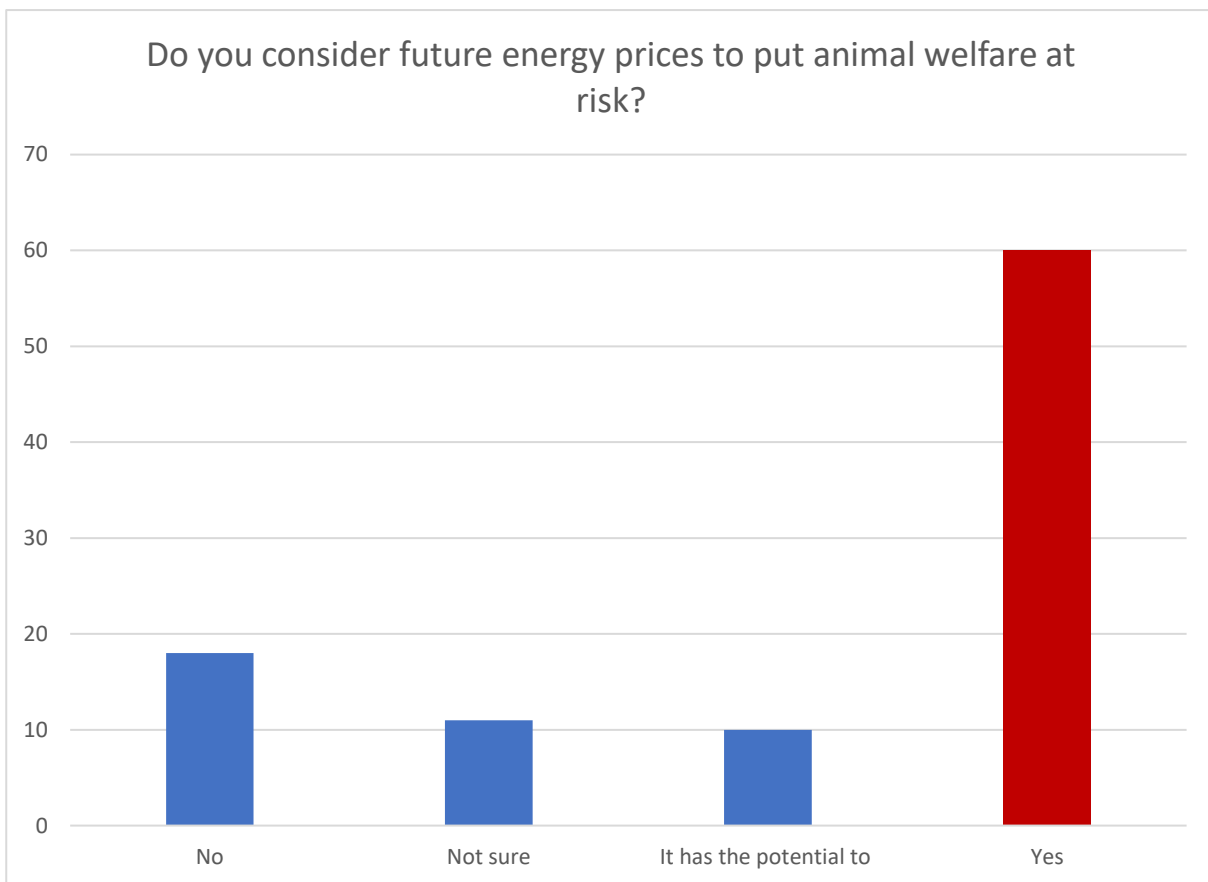


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Question 6.2: Do you consider future energy prices to put animal welfare at risk?

Response	Respondents	% of respondents
No	18	18.18%
Not sure	11	11.11%
It has the potential to	10	10.10%
Yes	60	60.60%
	99	70.70%



Methodology:

The number of respondents for each response divided by the total number for respondents.

Basic Analysis:

70.70% of pet centre owners are feeling that future energy prices either has the potential to lower animal welfare in store or that it definitely will.

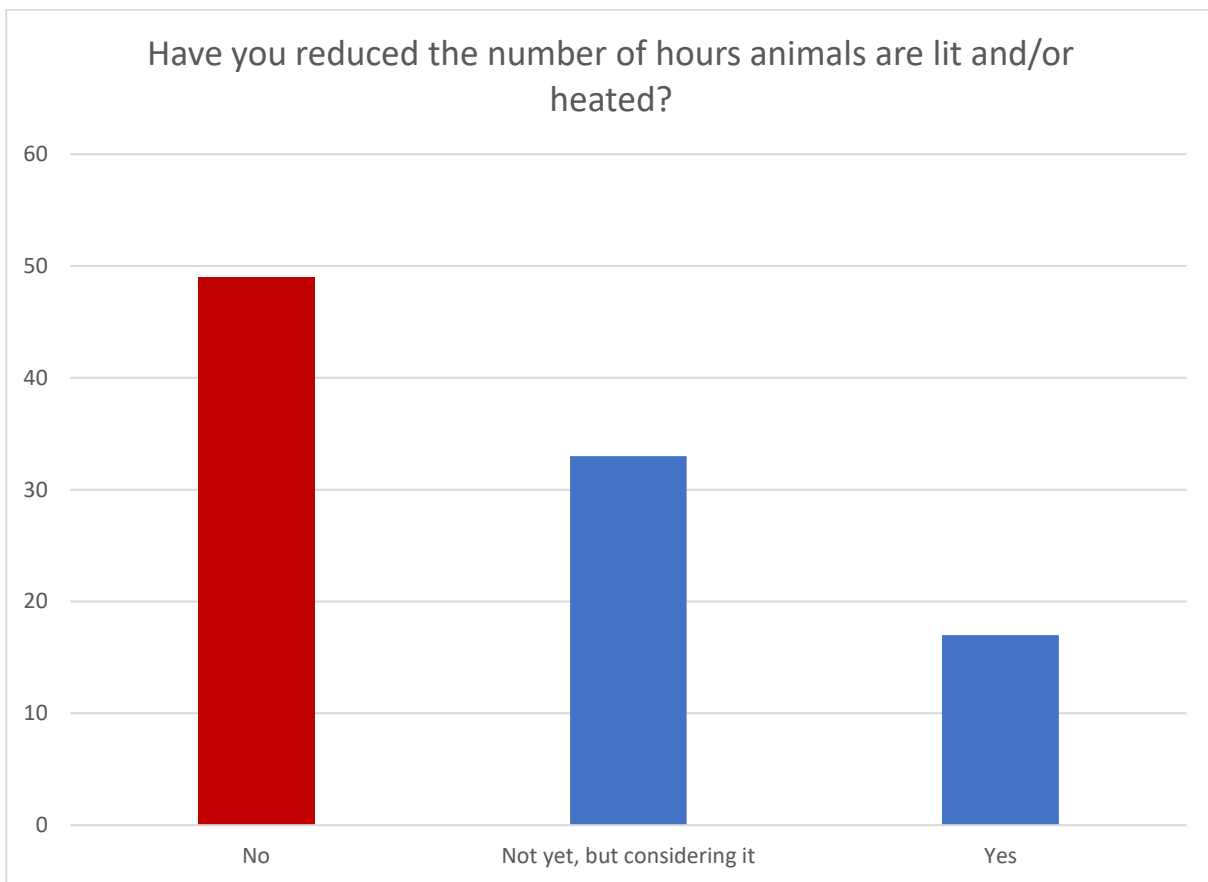


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Question 6.5: Have you reduced the number of hours per day animals are provided with light and/or heat?

Response	Respondents	% of respondents
No	49	49.49%
Not yet, but considering it	33	33.33%
Yes	17	17.17%
	99	50.5%



Methodology:

The number of respondents for each response divided by the total number for respondents.

Basic Analysis:

50.50% of pet centre owners are considering or already have reduced the number of hours animals receive lighting and/or heating.



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Extrapolation:

Shops are being put in a position where they are knowingly compromising animal welfare to save money. Knowing how passionate shops owners are this decision will not be taken lightly because when all said and done they are animal lovers not just business people.

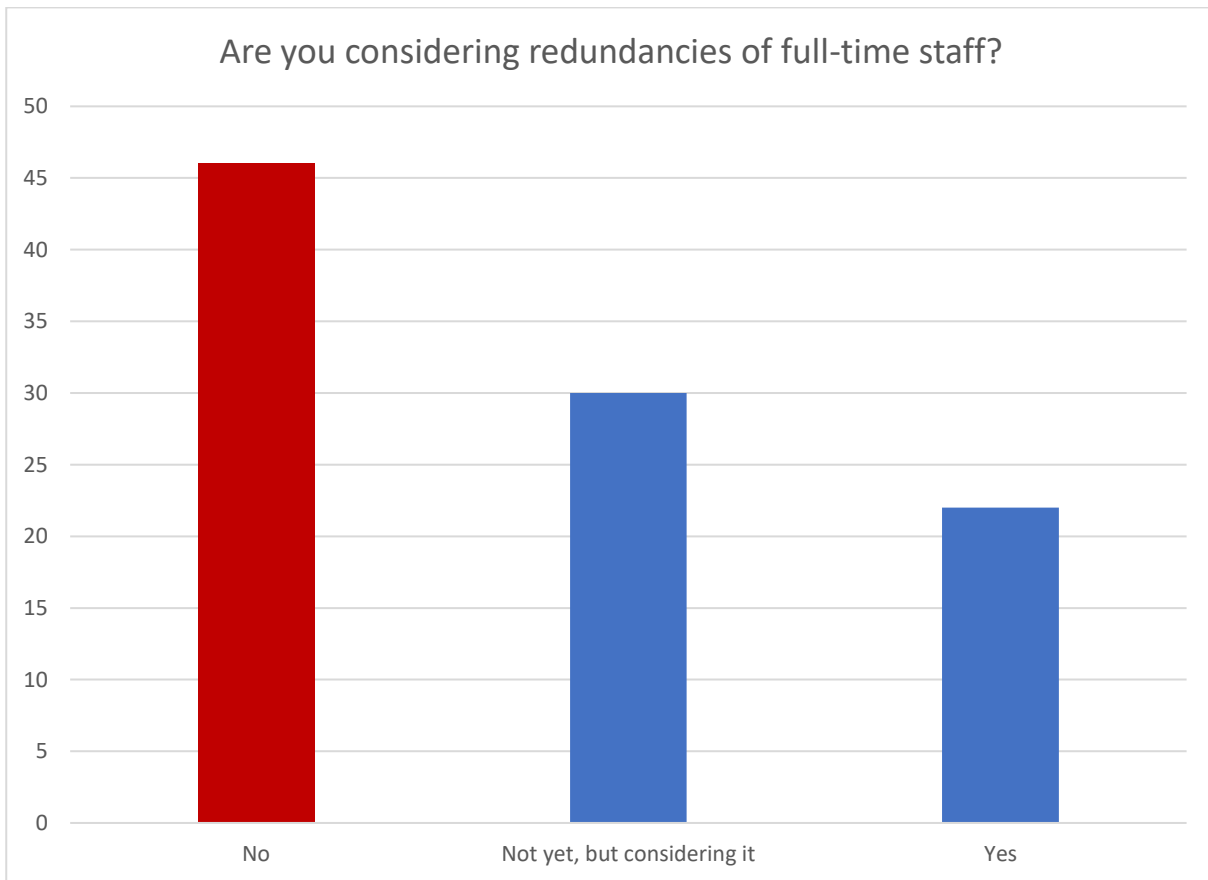
Shop owners do not want to be in this position. Long term, one can expect an increase in livestock fatalities as a result. A proliferation of illnesses such as respiratory infections will occur (which may well go untreated due to lack of funds trying to keep the business open).

This is a tangible downgrading of animal welfare because of energy pricing pressure.



Question 6.6: Are you considering redundancies of full-time staff?

Response	Respondents	% of respondents
No	46	46.93%
Not yet, but considering it	30	30.61%
Yes	22	22.44%
	98	53.05%



Methodology:

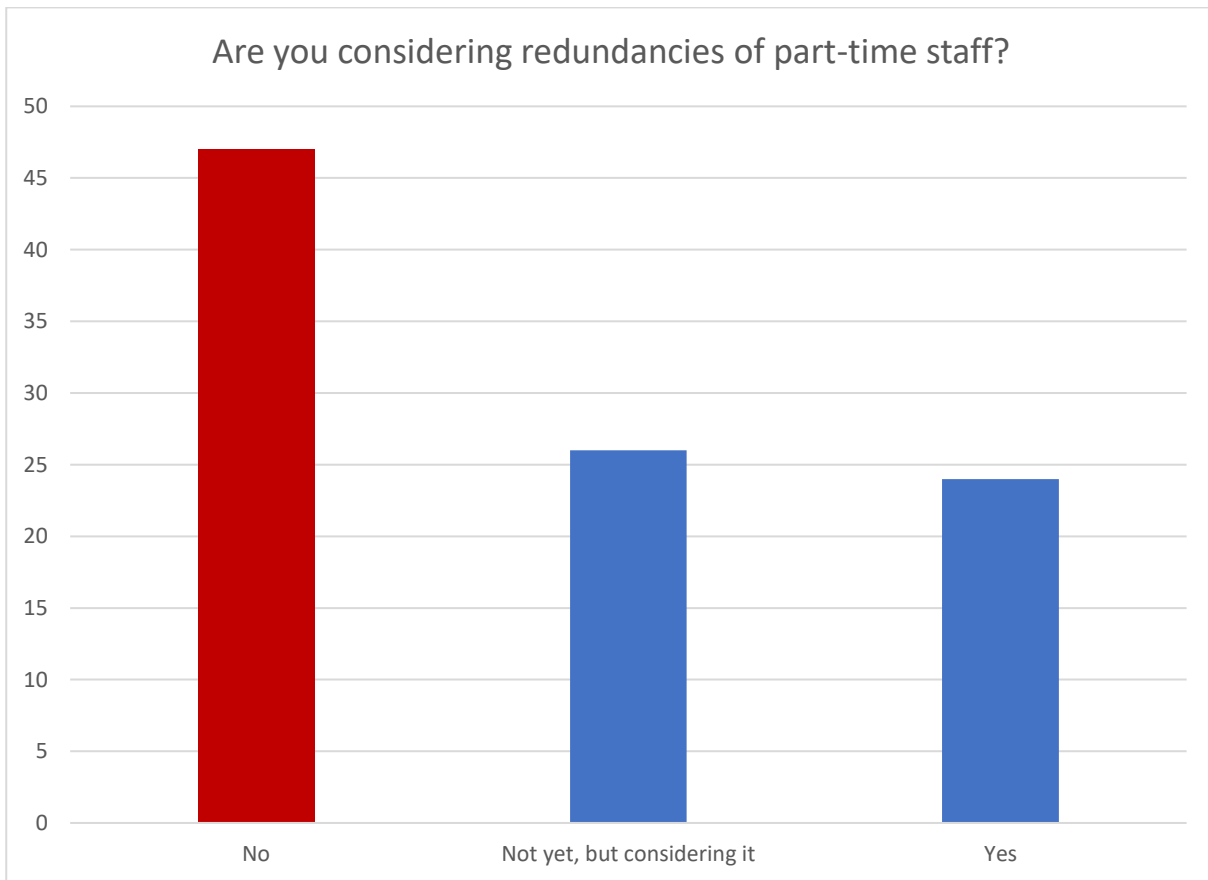
The number of respondents for each response divided by the total number for respondents.

Basic Analysis:

53.05% of pet centre owners are considering or making changes to full-time staff numbers in store as a direct affect of energy pricing and a depressed market.

Question 6.7: Are you considering redundancies of part-time staff?

Response	Respondents	% of respondents
No	47	48.45%
Not yet, but considering it	26	26.80%
Yes	24	24.74%
	97	51.54%



Methodology:

The number of respondents for each response divided by the total number for respondents.

Basic Analysis:

51.54% of pet centre owners are considering or making changes to part-time staff numbers in store as a direct affect of energy pricing and a depressed market.

Extrapolation of question 6.6 and 6.7:

The next largest cost of pet centre owners is payroll. Energy price rises cannot be negotiated and due to the species being maintained are essential to keeping the business open. Pet centres must look at staff levels to be able to afford energy costs.

These staffs are often devoted members of the team and the primary care givers to the livestock held in store. Each member of staff that leaves a business has a palpable effect on animal welfare in store.

When considered with the figures contained in question 6.2 this is a stark outlook on animal welfare provision moving forward into this crisis. Christmas may offer some mild relief but even this is expected to be heavily depressed leading to pet centres finding themselves in particularly difficult financial positions in the first two quarters of 2023.



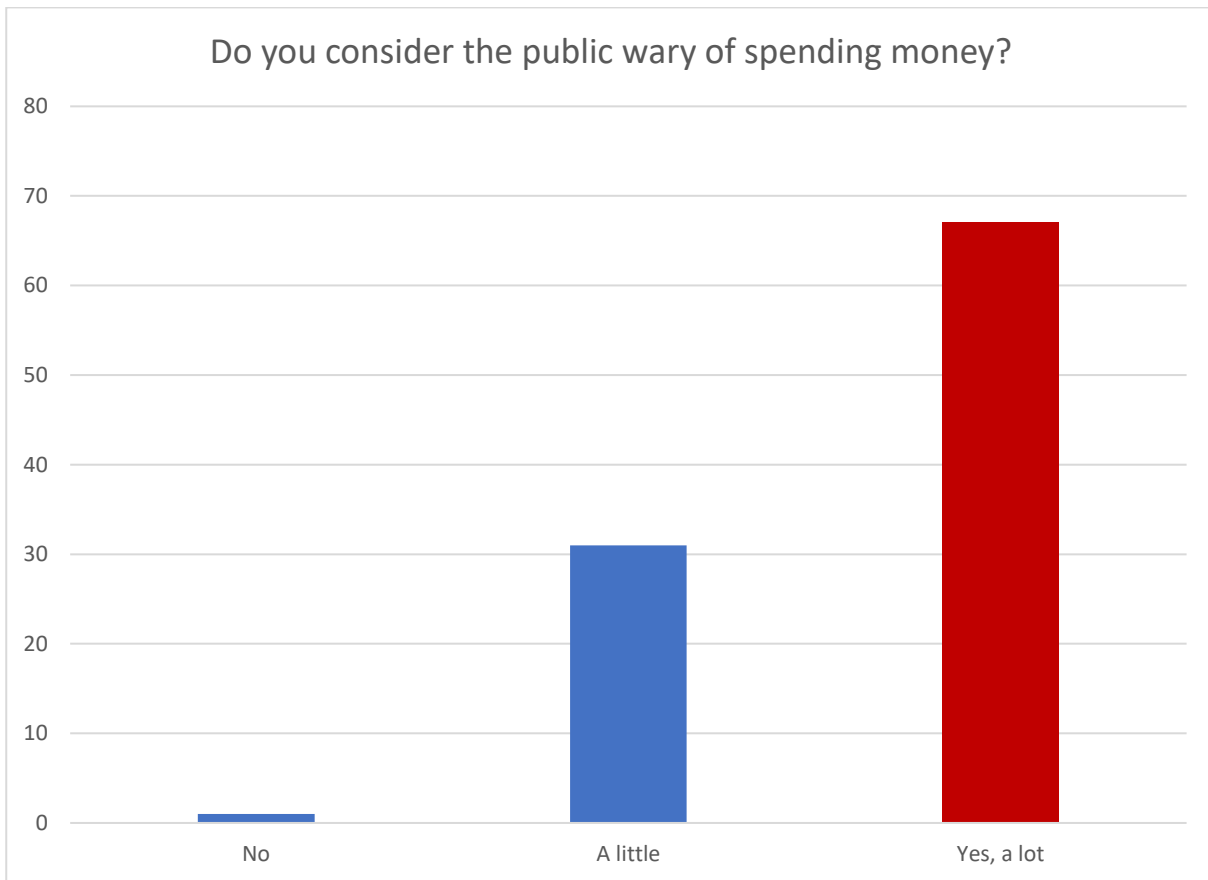


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Question 6.9: Do you consider the public wary of spending money?

Response	Respondents	% of respondents
No	1	1.01%
A little	31	31.31%
Yes, a lot	67	67.67%
	99	98.98%



Methodology:

The number of respondents for each response divided by the total number for respondents.

Basic Analysis:

98.98% of pet centre owners consider the public either slightly or considerably wary of spending money in store. There is much uncertainty about what the future holds for the public as much as businesses owners. When considered alongside 271.15% energy increases this is an incredibly difficult landscape in which to remain solvent.

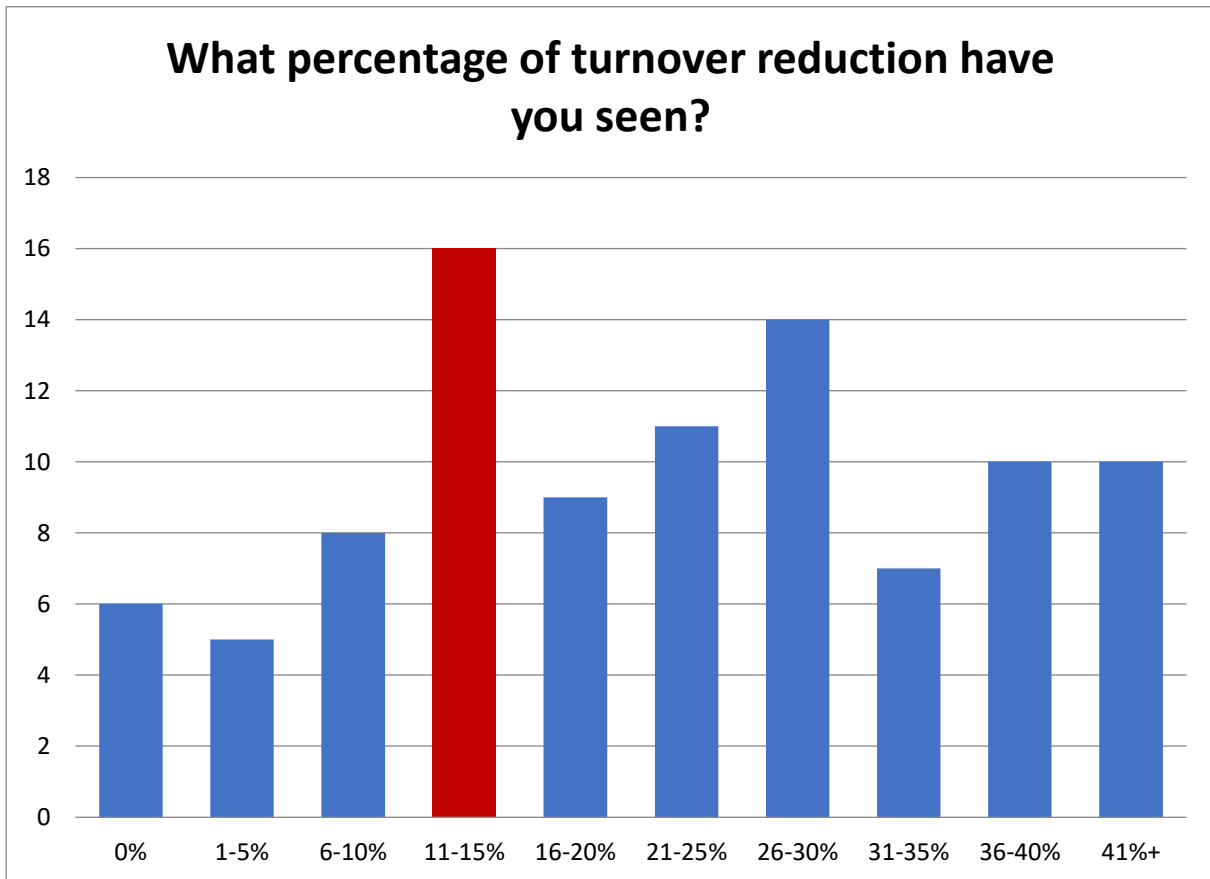


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Question 6.10: What percentage of turnover reduction have you seen?

Reduction %	Median	Respondents	Total
0%	0%	6	0
1-5%	3%	5	15
6-10%	8%	8	64
11-15%	13%	16	208
16-20%	18%	9	162
21-25%	23%	11	253
26-30%	28%	14	392
31-35%	33%	7	231
36-40%	38%	10	380
41%+	43%	10	430
		96	2135
			22.23%





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Methodology:

A median figure for percentage of turnover reduction has been used for each option. This gave a total multiplied by respondent numbers. This was then divided by the number of respondents to give the average overall.

Basic Analysis:

Specialist pet centre owners have seen their turnover contract by 22.23%

Extrapolation:

Industry turnover (not including internet based companies)

Turnover	Contraction	Calculation	New Turnover	Losses
£239,839,375	22.23%	X 0.7777	£186,523,082	£53,316,293

Industry turnover (including internet based companies)

Turnover	Contraction	Calculation	New Turnover	Losses
£318,986,368	22.23%	X 0.7777	£186,523,082	£70,910,670

Individual pet centre

Turnover	Contraction	Calculation	New Turnover	Losses
£244,984	22.23%	X 0.7777	£190,524	£54,460

With these losses in mind, we must now re-examine what proportion of pet centres turnover is spent on recently negotiated energy tariffs (a median of £0.5549kWh)

Energy Cost	Divide by	Turnover	Equals	X100
£27,745	/	£190,524	0.14562	14.562%

The contraction of turnover has pushed shops further past the accepted threshold for fuel poverty (10% of turnover)

Pet centres on existing tariffs (a median of £0.3077kWh) are now approaching the threshold for fuel poverty.

Energy Cost	Divide by	Turnover	Equals	X100
£15,385	/	£190,524	0.80750	8.075%



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Of the specialist pet centres that have negotiated their tariffs within the last six months 13 centres (33% of respondents in that section and 13% of pet centres overall or 127 businesses across the country) have prices over that of the median £0.5499kWh. Figures below will examine their percentage of turnover used for energy (based on the set consumption of 50,000kWh per annum)

£0.650kWh at 50,000kWh per annum (£32,500)

Energy Cost	Divide by	Turnover	Equals	X100
£32,500	/	£190,524	0.17058	17.06%

£0.850kWh at 50,000kWh per annum (£42,500)

Energy Cost	Divide by	Turnover	Equals	X100
£42,500	/	£190,524	0.22306	22.31%

£0.955kWh at 50,000kWh per annum (£47,750)

Energy Cost	Divide by	Turnover	Equals	X100
£47,750	/	£190,524	0.25062	25.06%

£1.255kWh at 50,000kWh per annum (£62,750)

Energy Cost	Divide by	Turnover	Equals	X100
£62,750	/	£190,524	0.32935	32.94%

£1.60kWh at 50,000kWh per annum (£80,000)

Energy Cost	Divide by	Turnover	Equals	X100
£80,000	/	£190,524	0.41989	41.99%

The six months window that pet centres have renewed tariffs within have had a sliding scale of impact. Those that renewed at the beginning of that period were receiving prices only slightly above that of the existing tariffs that will continue into 2023,2024 and 2025. Those that have renegotiated more recently have been the hardest hit. For centres that will have to renegotiate within the next year they may well be hit harder still.

The accepted threshold for fuel poverty is 10% of turnover. Some shops are being impacted by figures twice, triple or even quadruple this. Even with turnover that remained at £244,984 these percentages would only marginally reduce energy pricing impact.

Recent energy renewal prices are the vector that will make companies insolvent.

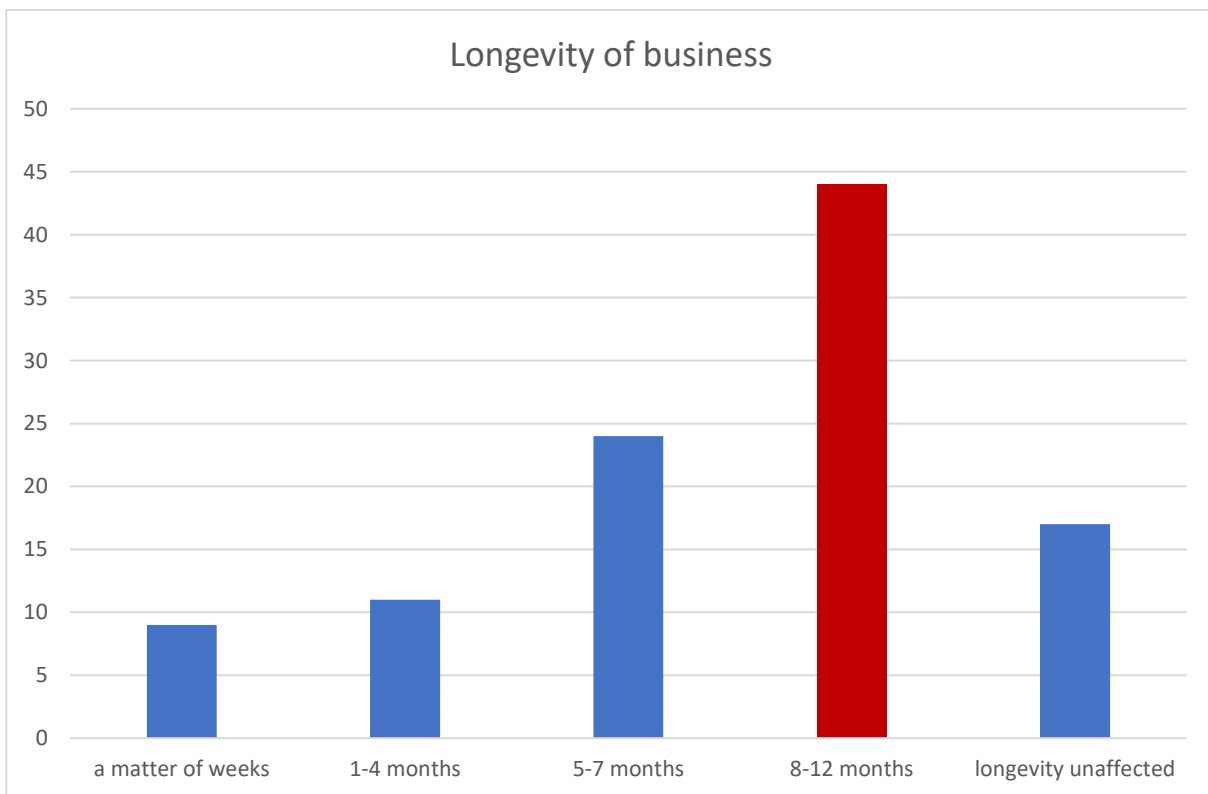


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Question 7.1: Without help or improvement to trading how would you rate your business' longevity?

Timescale	Median (weeks)	Respondents	Total
A matter of weeks	2	9	18
1-4 months	10	11	110
5-7 months	24	24	360
8-12 months	42	44	1848
Longevity unaffected	0	17	0
		96	2336
			24.33 weeks



Methodology:

The number of respondents for each response divided by the total number for respondents.

Basic Analysis:

82.29% of pet centres were willing to consider the longevity of their business if serious economic improvement or government intervention were not to occur. The average lifespan of these 82.29% centres (806 pet centres nationwide) is 24.33 weeks (170.31 days).

$170.31 / 30.43$ (days in a month) = 5.6 months. **Without intervention up to 806 stores nationwide may become insolvent within 12 months.**



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Extrapolation:

With average estimated energy price increases up 271% and a reduction of turnover of 22.23% these businesses simply will not survive. 82.29% of centres were willing to consider the unthinkable, their business becoming insolvent.

Expanded out nationwide this is effectively 806 of 979 shops that will have ceased trading within 12 months allowing for their predictions to be correct. This is based on the economic landscape and energy tariff renewals remaining static. This is a live and rapidly changing situation that REPTA full expects to worsen. This will curtail even these businesses longevity estimates further.

Remaining shops	Turnover	Total	Previous Total	Losses
173	£190,254	£32,960,652	£239,839,375	£206,878,723

Should this scenario play out, as businesses fail it will also collapse the specialist wholesaler network with a turnover in 2021 of approximately £45,000,000 combined (using latest accessible figures from the two main wholesalers submitted accounts to companies' house, there are however many more smaller wholesalers). All funding for research and development into improving animal welfare would stop and it is expected these wholesalers would become insolvent also. At this point pet centres that thought their longevity to be unaffected would be seriously negatively impacted too, without access to live feeds, frozen foods and essential products it is likely they would become insolvent too. There comes a point where the decline becomes too steep for the entire industry to recover from.

Zoological institutions would no longer be able to source feeds and equipment for their animals. The specialist wholesalers (whom supply the specialist pet centre network) produce all live feeds (insects such as crickets, locusts and mealworms) used in the UK. Not only pet centres will be deleteriously impacted by the above.

Animals held at these businesses and wholesalers would join the growing numbers needing to be re-homed. The re-homing network for reptiles and amphibians is chronically underdeveloped and this would lead to mass euthanasia of species (including endangered species). Due to volume, no triage system could operate and simply animals arriving would be put to sleep as no provision of care is possible. This will be one of the greatest declines in the animal welfare state in the history of the United Kingdom.

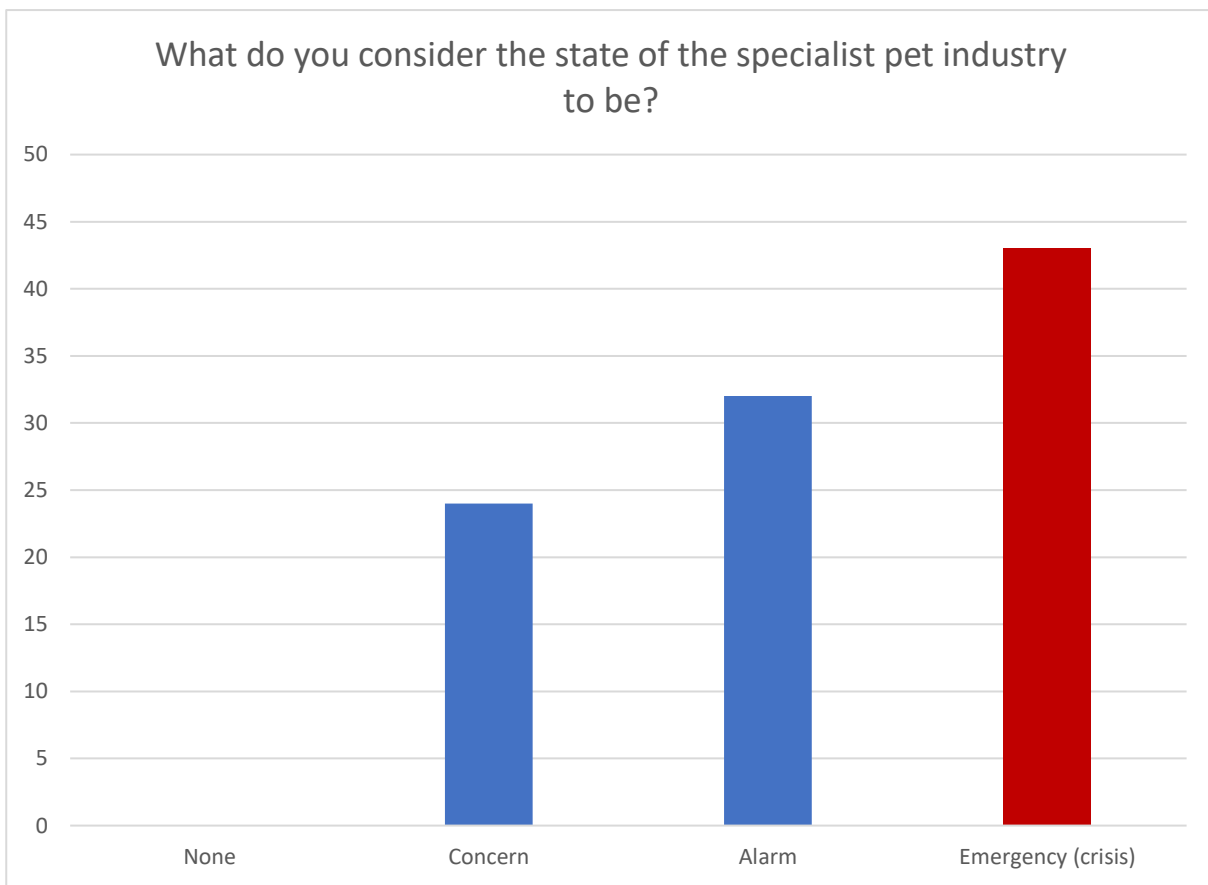


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Question 7.2: what 'state' to you consider the specialist pet industry to be?

State	Respondents	% of respondents
None	0	0.00%
Concern	24	24.24%
Alarm	32	32.32%
Emergency (crisis)	43	43.43%
	99	75.75%



Methodology:

The number of respondents for each response divided by the total number for respondents.

Basic Analysis:

75.75% of respondents feel that the specialist pet industry is either in a state of alarm or emergency (crisis). This is a reflection of pressure on businesses through the energy and cost-of-living crises. 100% of businesses acknowledge some form of cause for concern.

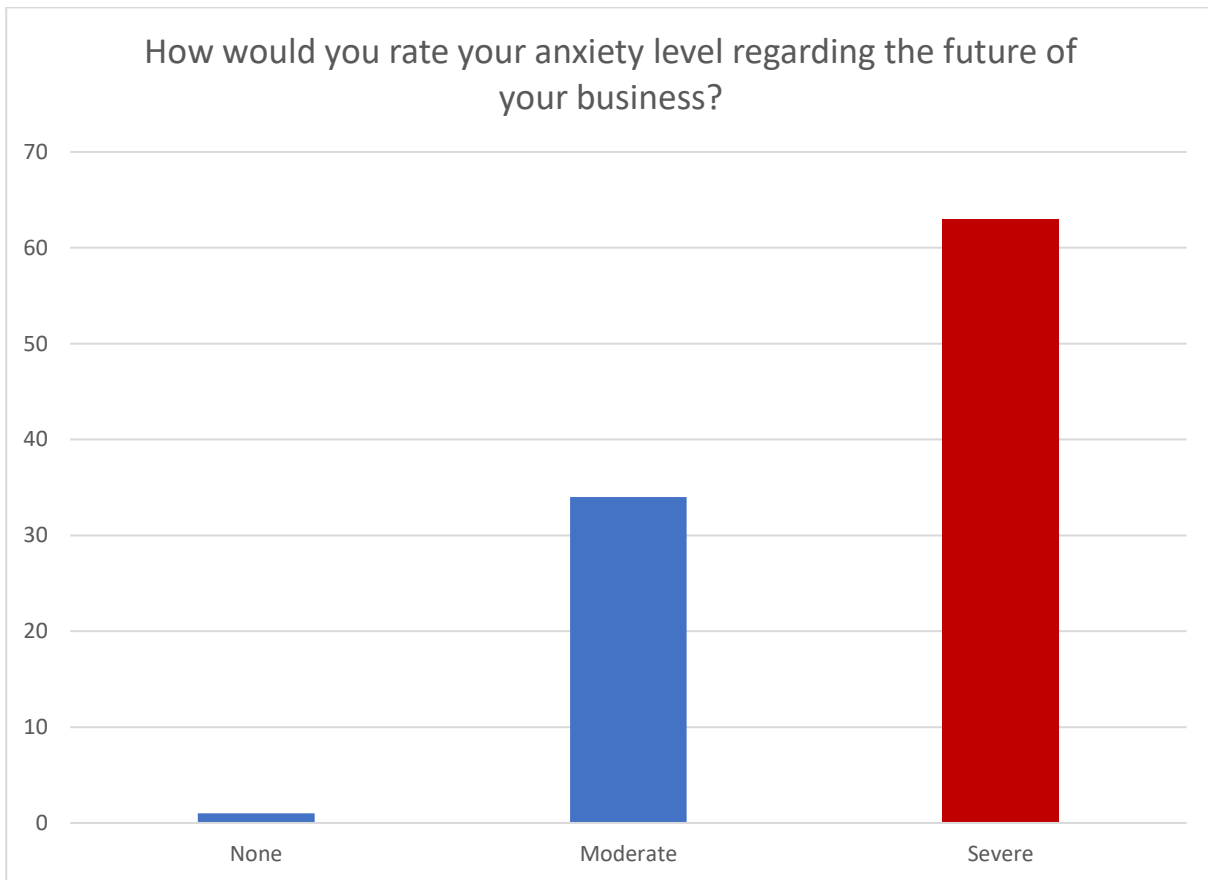


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Question 7.3: Rate your anxiety levels about the future of your business?

Level	Respondents	% of respondents
None	1	1.02%
Moderate	34	34.69%
Severe	63	64.28%
	98	98.97%



Methodology:

The number of respondents for each response divided by the total number for respondents.

Basic Analysis:

98.97% of respondents are affected by some form of anxiety. 64.28% categorise their anxiety as severe. **Mental health welfare is critically important, a business failing may have severe (possibly extreme) consequences.**

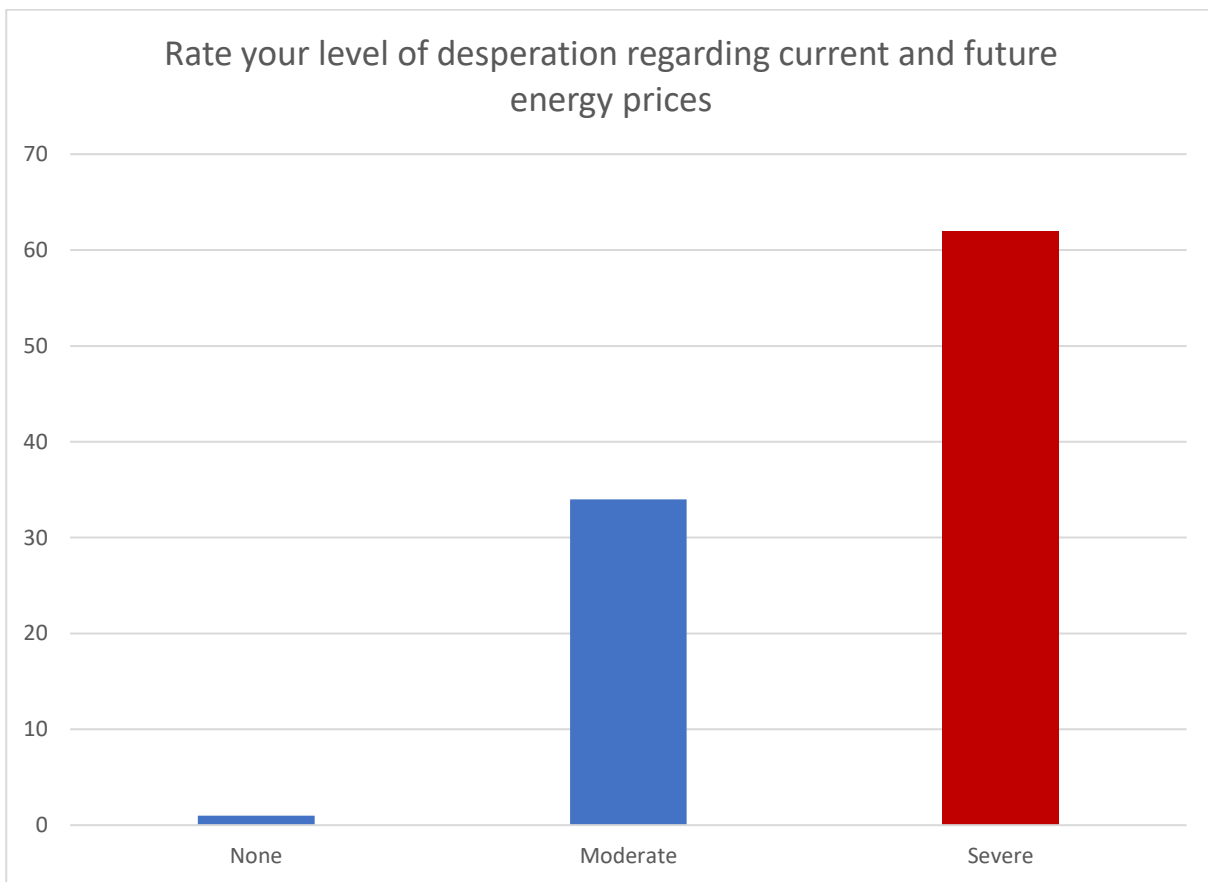


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Question 7.3: Rate your level of desperation regarding current and future energy prices?

Level	Respondents	% of respondents
None	1	1.03%
Moderate	34	35.05%
Severe	62	63.91%
	97	98.96%



Methodology:

The number of respondents for each response divided by the total number for respondents.

Basic Analysis:

98.96% of respondents are feeling some form of desperation regarding current and future energy pricing. Desperation bore out of the fact they cannot 'do without' energy. **Energy is a prerequisite to their business functioning. Businesses are forced to take contract that they know they cannot afford simply because there is no other option.**

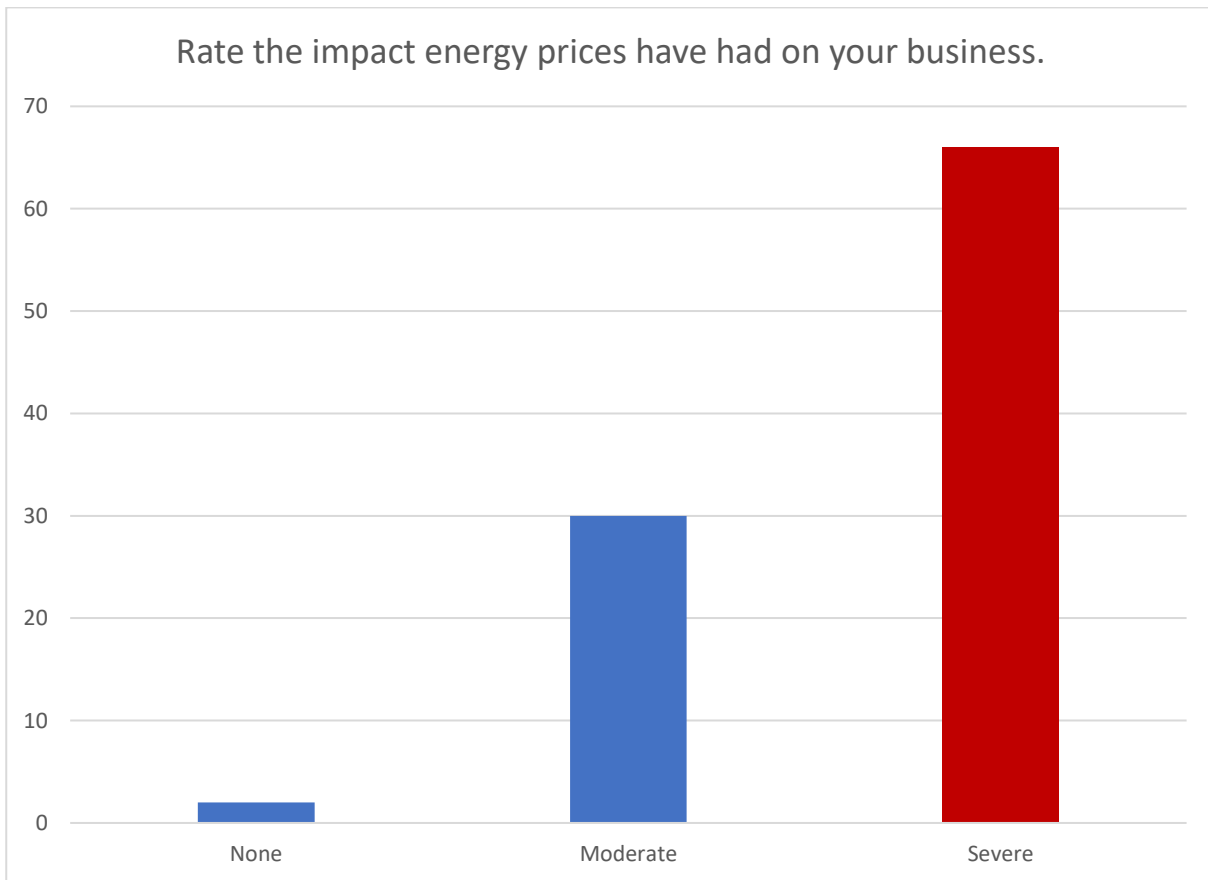


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Question 7.3: Rate the impact energy prices have had on your business?

Level	Respondents	% of respondents
None	2	2.04%
Moderate	30	30.61%
Severe	66	67.34%
	98	97.96%



Methodology:

The number of respondents for each response divided by the total number for respondents.

Basic Analysis:

97.96% of respondents are feeling some form of impact regarding current and energy pricing. 67.34% rate that impact as severe. **There is only so long these businesses can function in these conditions before insolvency becomes a foregone conclusion.**