



Game Meat Survey results



July 2018

Introduction

Following reports in November that some shoots were finding marketing shot game more challenging during the 2017/18 season, Savills and the Countryside Alliance joined forces and conducted a short survey to investigate. 566 responses were received from shoots, 81% advised how many shot game birds they handle each season, collectively the total exceeds 1.6 million birds.

Table 1. Composition of sample

Size category	Number	% of sample	Range used for category
Small shoot	223	39	0 to 1,200
Medium shoot	146	26	1,200 to 4,000
Large shoot	91	16	4,000 +
Not known	106	19	
Total	566	100	

Key findings

- 73% of shot game is sold or given to third parties
- 41% of shoots sell/give some birds to game dealers and 23% to local pubs, restaurant and hotels
- On average, for the larger shoots 77% of the game sold or given away goes to game dealers
- Overall shoots are receiving income from 27% of birds collected by game dealers, 48% are given away for free and for 25% of birds, a payment is required for their collection
- The overall average price paid for pheasants (in 2017/18 season) was 60p and for partridge 55p
- Where shoots are paying for collection of game, the majority are paying between 20p and 30p per bird
- 39% of shoots have concerns about the security of their market for dead game in the 2018/19 season
- The largest proportion of shoots view giving birds away for free locally or developing local sales as potential solutions
- 94% of shoots believe that there is a case for greater co-operation on shoot game marketing
- 64% of shoots would be willing to pay a levy per bird shot, to fund a game marketing board
- The most common suggestion to strengthen the market for dead game was via improved marketing and awareness of the benefits of eating game
- A significant proportion of shoots (39%) have found processing to be an effective way to get game into new markets.

What currently happens to shoots shot game

As shoot size increases, shoots become more dependent upon third party outlets as the capacity for home consumption and consumption by those involved with the shoot is filled. When weighted by the volume of birds, the data shows that overall 73% of shot game birds are sold / given to third parties.

Table 2. Average proportion of shot game for each destination

Size category	Consumed by guns / beaters %	Sold / given to third parties %	Retained for 'home' consumption %	Disposed of as unfit for human consumption %
Small shoot	51	31	15	3
Medium shoot	23	63	10	3
Large shoot	14	76	6	4
Not known	42	38	11	9
Overall average	37	48	11	4

Where do the birds which are 'sold / given to third parties' go?

Game dealers are more commonly used by larger shoots, and "other" outlets become less common. Use of the local hospitality trade is slightly more common on smaller shoots, however the difference is not large.

Table 3. Proportion of shoots using each market outlet for birds sold/given to third parties

Size category	Game dealer	Game processor	Local pubs, restaurants and hotels	Charity	Other
Small shoot	25%	9%	25%	3%	38%
Medium shoot	47%	12%	22%	3%	15%
Large shoot	61%	11%	20%	0%	9%
Not known	40%	15%	27%	3%	16%
Overall average	41%	11%	23%	2%	22%

128 shoots selected "other"; analysis showed that the overwhelming majority of shoots (75%) described "other" using one or more of the terms "locals, elderly, tenants, other staff, friends and family", suggesting the birds were distributed for free locally.

Financial arrangements with game dealers

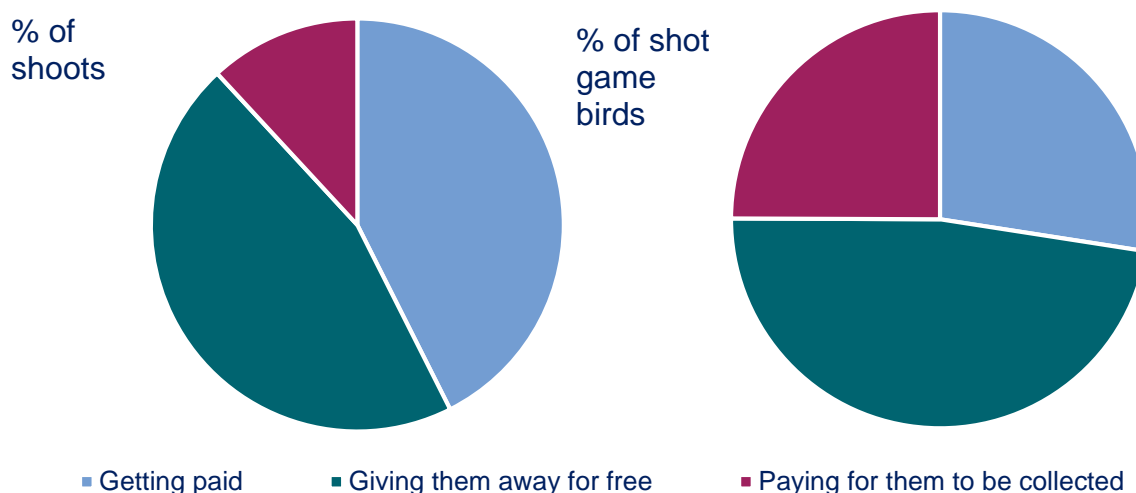
Of all the birds **sold / given to third parties**, game dealers are the most significant market, on average taking 48% of a shoot's birds. However because larger shoots are more likely to use game dealers the proportion of total shot game they receive is higher at 80%. The remaining 20% is split fairly evenly between processors, local sales and local gifts.

Table 4. Total number of birds going to each market outlet

Size category	Game dealer	Game processor	Local pubs, restaurants and hotels	Charity	Other
Small shoot	17,973	6,305	9,397	361	9,825
Medium shoot	158,704	21,935	22,662	2,912	28,491
Large shoot	772,817	52,080	46,281	0	33,218
Overall average	949,494	80,319	78,341	3,273	71,534

Shoots receive income from 27% of birds received by game dealers, 48% are given away for free and for 25% of birds a payment is needed to secure collection. Larger shoots are less likely to receive payment from game dealers, despite the higher volumes, this tends to suggest that volume presents issues for the supply chain.

Financial arrangement with game dealers



As shoot size increases the average payment received per bird in feather drops. Where shoots are paying for collection these payments drop too; the majority are paying between 20p and 30p per bird, 20p is most common.

Table 5. Average payment received per bird in feather

Size category	Payments received		Payments made	
	Pheasant (p)	Partridge (p)	Pheasant (p)	Partridge (p)
Small shoot	79	66	82	84
Medium shoot	58	65	32	36
Large shoot	41	40	27	28
Not known	54	23		
Overall average	60	55	41	42

Market security and development

- 39% of shoots have concerns about the security of their market for the 2018/19 season. Large shoots are more concerned than smaller shoots, most likely reflecting their greater reliance on game dealers rather than local outlets / giving birds away for free.
- The largest proportion of shoots view giving the birds away for free locally, or developing local sales as potential solutions.

Table 6. Top intended solutions to market insecurity

Intended solution	% of ideas
Consume locally free of charge	20
Continue/increase local sales	16
Considering processing	12
Continue with current game dealer	12
Find new game dealer	7
Aware will get less/no money for birds	6
Combine with local shoots to have more saleable birds to market	5
Process before giving away	5
Consider giving up shooting/cut down on number birds	4
Game dealer needs incentive (e.g. venison supply)	3

- 94% of shoots believe that there is a case for greater cooperation on shot game.
- 64% of the shoots would be willing to pay a levy per bird shot to fund a game marketing board.

Shoots most commonly suggested cooperation could improve marketing and awareness (25%), and also coordination and negotiation with supermarkets to increase sales and listings. A number of variants

of processing activity also received support. 10% of the suggestions relate to shoots limiting the number of birds shot.

Table 7. Top proposed ways cooperation could be improved to strengthen market

Suggested cooperation	% of ideas
Improved marketing / awareness of game and its advantages	25
Central body to promote game and co-ordinate sales in supermarkets etc.	11
Local group to process / market game	10
Limit numbers of birds shot	10
Encourage processing to produce breasts, sausages, ready meals etc.	8
Guns and others encouraged to take / eat game	7
Donate to charity / locally	6
Improve handling / breeding of game for better product / find way to remove lead	5

Examples of best practice use or marketing of shot game

A wide range of best practice examples were given by shoots. A significant proportion (39%) have found processing to be a successful way of getting game into markets, and 16% give examples related to local sales. Many have identified the need to raise awareness and overcome barriers which deter consumers from using game meat, with many suggesting educational activity, cooking demonstrations and promotion of game meat using samples.

Table 8. Top examples of best practice game use or marketing

Best practice examples*	%
Process to make more attractive	39
Sales to local outlets	16
Given / discounted to local outlets / schools to try	7
Cookery demos / recipes given	6
Innovative recipes	6
Install chillers	5
Advertise locally when game available	3
Group with other shoots to have enough birds for game dealer to collect	3

Best practice advice

- Be alert to and keep up to date with, the game meat supply and demand issue and the measures being put in place to combat and improve the position (particularly the recent formation of the British Game Alliance)
- Regardless of the scale of your shoot, make sure you have an identified and secure outlet for the game meat for the season ahead (and have a back-up/alternative plan in addition to this)
- Consider building in a 'cost line' to shoot budgets for 2018/19 season for game collection
- Make sure shot game is handled carefully to avoid damage or contamination, and that it is chilled to an ambient temperature of below 4°C as soon as possible
- Good game carts/carriers on shoots play a key part of this process to aid the cooling and ventilation process. More information is available from the Guide to good game handling – web link is listed below
- Consider all possible local avenues for game meat sales particularly with local pubs, restaurants, farm shops etc. even if given away at minimum or nil value
- If possible and practical give game to guns at the end of the day 'oven ready' rather than in feather.

Further information

Code of Good Shooting Practice:

<https://www.gwct.org.uk/media/768987/CodeGoodSHootingPractice.pdf>

British Game Alliance: www.britishgamealliance.co.uk

Guide to good game handling: <https://www.gwct.org.uk/media/550179/Code-of-Good-Game-Handling.pdf>

The Country Food Trust: <http://www.thecountryfoodtrust.org/>

Particularly their recent deals with game dealers who will take birds with shoots paying £1/bird, and process them into meals for those in food poverty

Countryside Alliance 'game to eat': <https://gametoeat.co.uk/gte/>

Eat Game Awards 2018: <https://eatgameawards.co.uk/>

Wild Game Ltd: <https://www.wildandgame.co.uk/>

Taste of Game: <https://tasteofgame.org.uk/>

Food Standard Agency - wild game and food hygiene guide: <https://www.food.gov.uk/business-industry/farmingfood/wildgameguidance>



Andrew Teanby
Rural Research
+44 (0) 1522 507 312
+44 (0) 7835 445 458
ateanby@savills.com



David Steel
Head of Sporting
+44 (0) 1200 411 051
+44 (0) 7768 953 332
dsteel@savills.com