



The Big British Butchers Survey 2023



Introduction

National Craft Butchers have over 130 years' experience as butchery experts. Our members are artisans and skilled specialists, made up of independent butchers, farm shops, cutting plants, and small abattoirs, as well as key suppliers to the industry.

Our focus is to promote and enable butchers through a range of activities. We are the go-to trade association for independent butchers and the meat industry in England and Wales.

In 2021 we started our mission to collect the right data about independent butchers ensuring we could highlight the services they provide to their communities. The first British Butchers Survey tracked the impact of the first year of the pandemic and helped paint a clear picture of modern retail butchery at that time. In 2023 we have repeated the survey. Whilst the survey was named the Big British Butchers Survey, those in all parts of the UK were welcome to complete it.

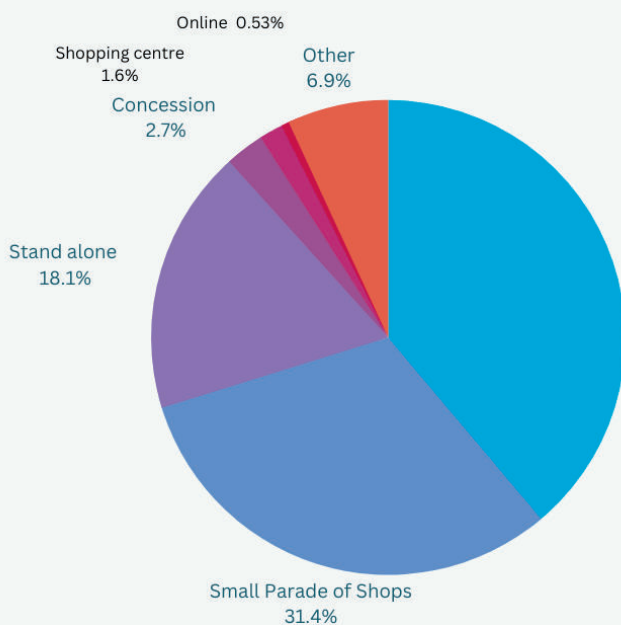
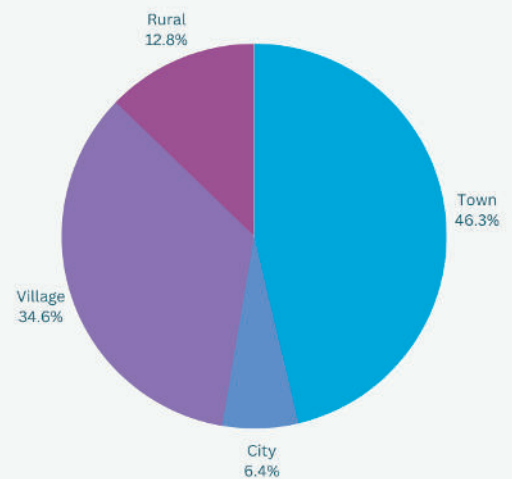
Percentage results from the survey have been rounded to the nearest whole number in this report.

Survey Respondents

There were 188 responses to this survey, 76% were from England, 11% from Scotland, 7% from Wales and 1% from Northern Ireland with the remaining 5% identifying as none of these.



The majority of respondents were based in Town locations (46%) followed by Villages (35%). The shopping district location was mainly high street (39%) or a small parade of shops (31%).

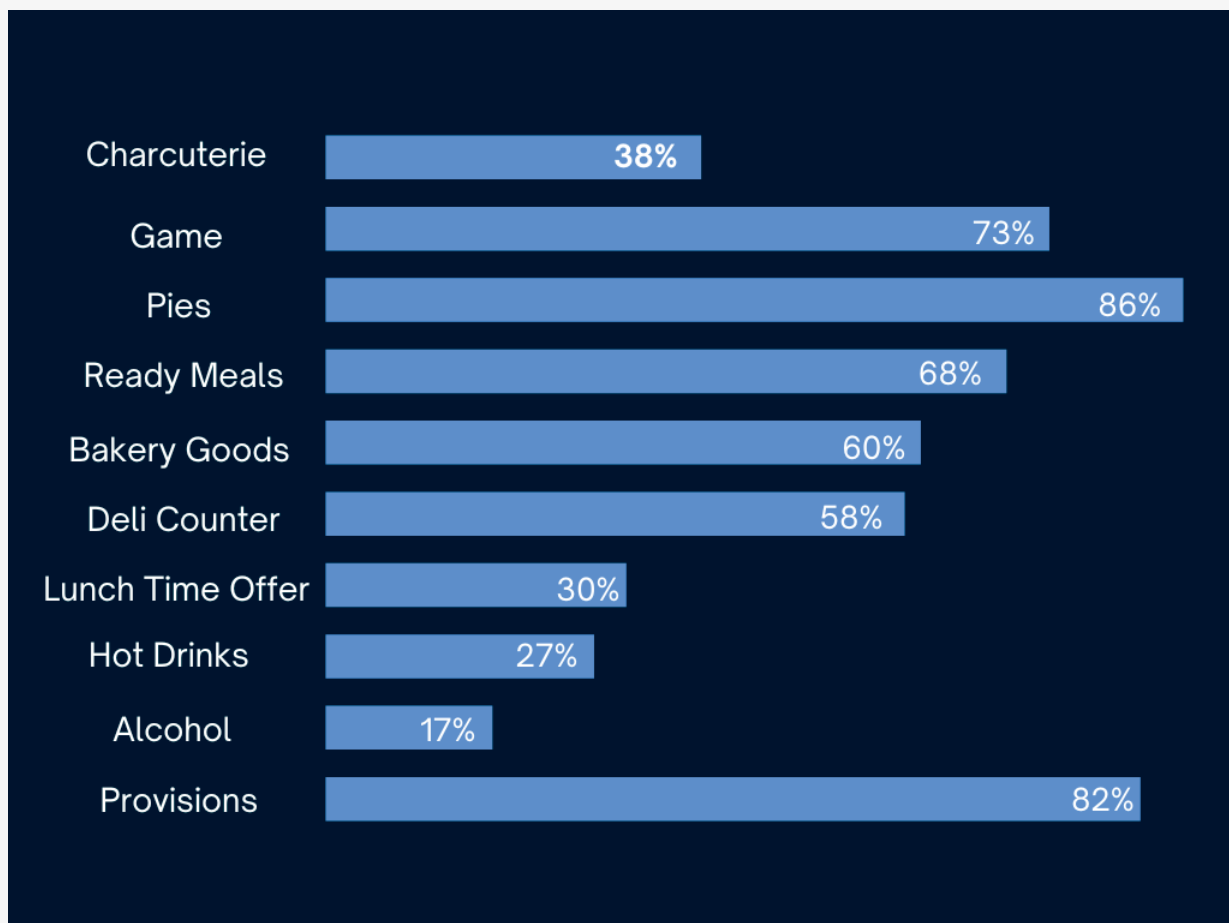


How would you describe the type of location of your shop?

- Online Only
- Shopping Centre
- Concession
- Stand Alone
- Small Parade of Shops
- Online Only

Modern Craft Butcher

Craft Butchers in 2023 are offering their customers more than ever. We asked what products they offered in addition to meat.



The results show that they are specialist food stores providing artisan produce and expert advice. Whether that is for the Sunday roast, weekday BBQ or any other occasion. We noted a rise of 8% in those offering ready meals since 2021 whilst the other areas remained comparable.

15% were also offering a variety of other items including, dairy products, fruit & vegetables, household items and frozen fish.

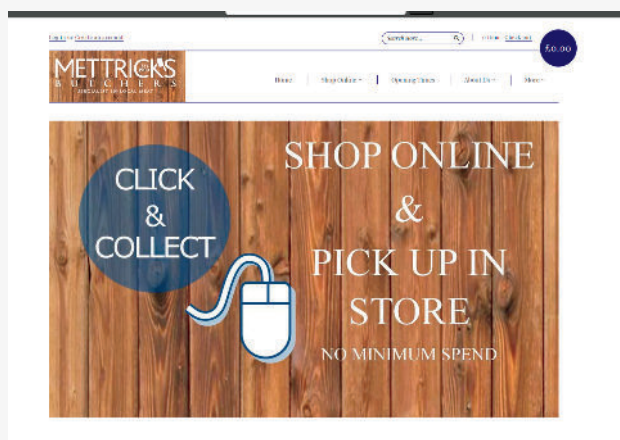
In 2023 consumers have different ways to shop and engage with independent butchers. The changes already being made across retail were accelerated during the pandemic with more businesses offering online shopping, click and collect and embracing social media.

Over 70% of respondents have business websites, comparable with 2021 results. With 42% of those including an ecommerce platform for online orders, up from 38% in 2021.

Convenience for shoppers continues to delivery with 86% of respondents offering this service. 21% offer national delivery options with the remainder offering local delivery.

Butchers have also embraced social media with 96% ensuring their business has a presence on one of the main sites. Facebook is the most popular with 95% of businesses on the site. Instagram follows with 60%, then Twitter at 29% and TikTok at 12%.

Instagram and TikTok see the most growth since 2021 with Instagram showing a 5% increase and TikTok a 9% increase.



96%

are on social media

42%

offer national delivery

21%

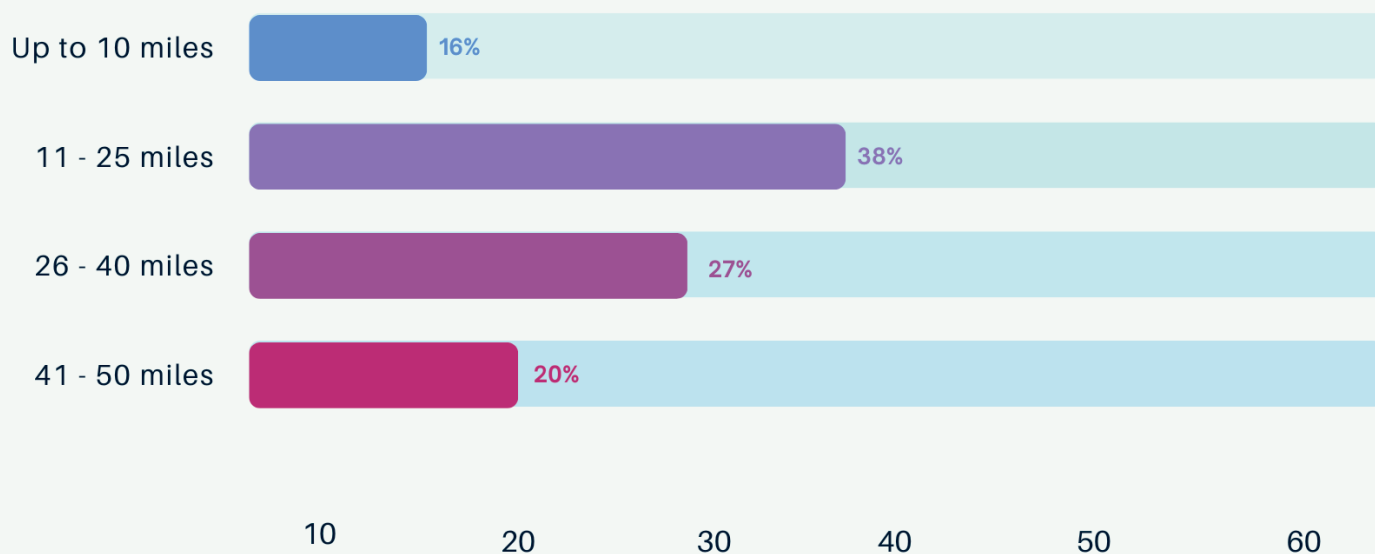
offer online shopping

Shop Local

We asked Butchers if they prioritised local produce and if they felt their customers did, unsurprisingly the answer to both questions was a resounding yes.

88% of respondents prioritised local produce across their business. An increase of 1% from 2021. This comes with an average food mile of 25 miles and an average of 46% of meat coming directly from local farmers.

What is the average food mile of your local produce?



There was also an increase in respondents who sold Organic, Pasture Fed or Free Range meat in their shops, from 61% in 2021 to 66% in 2023.

Unsurprisingly these moves have come with an increase in butchers buying live from 38% to 45%. 70% of respondents say that their supply chain relies on a small abattoir. 68% say that the closure of that abattoir would substantially impact on their business.

Customers

We asked butchers to give us an image of their average customer. 84% believe the majority of their customers are female and 57% place them between 46 and 59 years old.

83% of respondents believe that their customers value local produce and 78% believe this has increased in the two years since our last survey.

In our 2021 survey which included the first 12 months of the pandemic, 61% had seen a change in their customer base. In 2023 only 41% have seen a change since the last survey.

However, all have reported similar changes in their customers' habits as highlighted below.

Conscientious Shoppers

*More
ready
meals*

***Younger
customers***

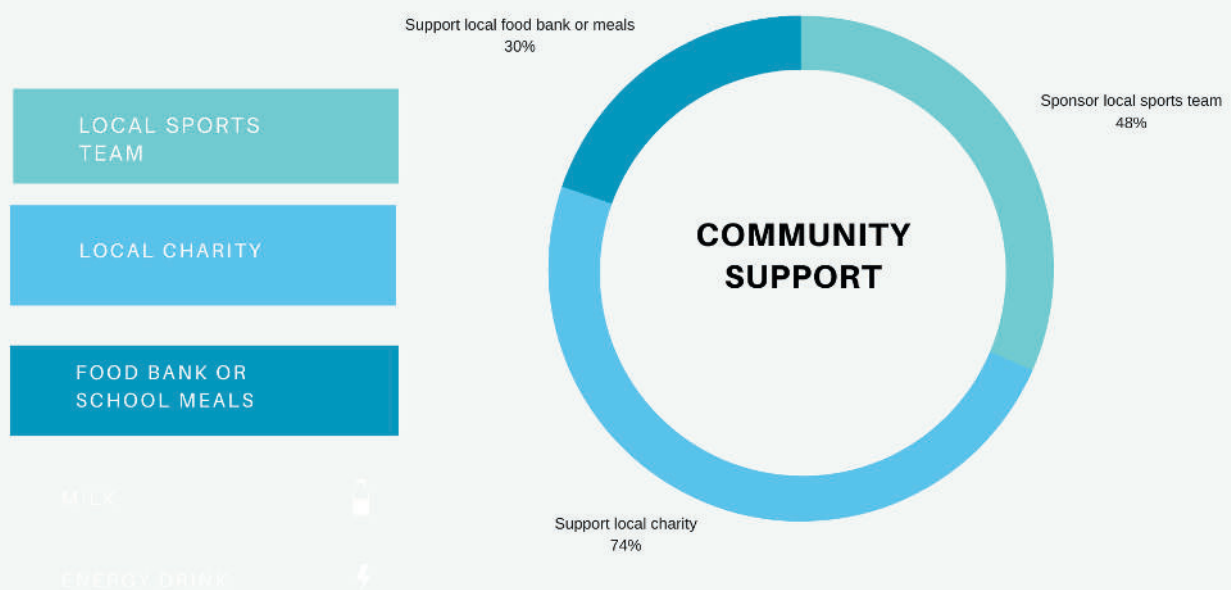
*Increase in
male
customers*

More interest in local meat

***More hot food
to go***

Community

The high street, retailers, and other local businesses are an integral part of communities throughout the UK. We asked how butchers were supporting their local communities.



90% of the respondents were actively involved in supporting their local community.

74% supported a local charity, 48% sponsored a local sports team and 30% supported a local food bank or provided an alternative to school meals.

6% supported in a variety of ways including deliveries to vulnerable people in the community, supporting local guides, scouts, brownies or cub groups, supporting hospitals, churches or village groups.

Sustainability

Sustainability in business refers to a company's strategy to reduce negative environmental impact. Independent butchers are in a perfect position to do this for their meat with short local supply chains and relationships with farmers.



56% have increased their stock of local produce



70% have moved to recyclable or compostable packaging or bags



30% have invested in solar panels, electric vehicles or renewable energy



55% have changed their waste management processes

80% of respondents have taken decisive action to improve their sustainability practices in the last two years.

The Future

While the Big British Butchers Survey 2023 clearly underlines the positive impact that independent butchers are having on their local areas, it has once again shone a spotlight on the challenges facing our industry. 20% of respondents changed their business hours in the past 12 months, with 38% citing rising energy costs as an influential factor and 22% pointing to staffing issues.

Age also appears to represent a sizeable threat to the future of independent butchery in the UK, as 50% of surveyed business owners were aged 56 or above and 26% plan to retire in the next five years. Only 33% of respondents were currently employing an apprentice, although 82% said they would welcome one.

However, there are positives, with most reporting steady trading conditions across the country. 56% of respondents indicated a higher turnover in 2022 than 2021, 55% reported an increase of footfall in 2022, and 9% have grown their business in the past 12 months by opening a new branch.

Looking forward we find more positives, as a growing focus on succession planning has resulted in 42% confirming they had a succession plan in place, an increase of 11% since 2021.

The future of independent butchery in the UK will be reliant on support from local communities, timely policy making in government, and the industry working together, if we're to avoid the erosion of this traditional and highly skilled craft.

National Craft Butchers remains as committed and essential to its members now as when it was formed 135 years ago.

Acknowledgements

The Big British Butchers Survey was carried out by National Craft Butchers.

We would like to thank the organisations and individuals who shared the survey as well as everyone who took the time to complete it.
