

THE UK'S TRUST IN FOOD INDEX

YouGov



Research conducted by YouGov
and commissioned by Red Tractor

Do we trust British food?
A new report into UK attitudes to food and drink

October 2021



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Trust in the UK's food

Darren Yaxley, Head of Reputation & Business Research, YouGov

Perhaps like no other time in recent history, the food that we consume as a nation is at the heart of some of the fiercest and most polarised public debates.

Open a newspaper on any given day and you will be met with questions about the impact of Brexit on food standards, what is the best way to produce food, for example injecting hormones into beef or producing chlorinated chicken, or whether the Government is doing enough to promote healthy eating.

In this context, it is interesting – and important – to ask the question: does the UK public actually trust the food that it eats? This report, the first UK Trust in Food Index, asks that question and it is clear from the data that the UK is performing very well – there is an encouragingly high overall level of trust in UK food.

Indeed, when compared to other aspects of UK life, trust in food is on a par with NHS care – a comparison that those in the food sector should not take lightly after the last 18 months. UK food is far more trusted than other aspects of UK life such as the media, financial services companies, and the legal system.

However, more importantly, food from the UK is trusted far more than food from other countries. This is especially true of food imported from the USA or China, where levels of trust are extremely low.

At the heart of the trust in UK food is a clear sense that the rigour of our regulation and food assurance schemes – voluntary schemes which set standards covering food safety, animal welfare and environmental protection – together play a strong role in ensuring the food we eat is produced to a high standard. This system of regulation, auditing, and third-party assurance governs the food we eat.

We know from other YouGov data sources that a lack of regulation harms the trustworthiness of businesses such as tech firms, online retailers, and social media companies. Of course, there is a different dynamic at play with food, but the key learning that can be drawn from other sectors is that regulation, or at least the perception of regulation, together with independent third-party scrutiny, can have a hugely beneficial impact on trust.



Christine Tacon, Chair, Red Tractor

It was my hope that by launching the first edition of the UK Trust in Food Index that we would shed some light on how the UK public currently feels about what we eat at a time of intense scrutiny around food. And I have not been disappointed.

It is hugely encouraging to see that UK food is much more trusted than food from anywhere else in the world. Whether it is chicken, beef, dairy or fruit, British consumers place a higher level of trust in the food produced in the UK.

Of course, many of our international trading partners perform well – New Zealand is rated highly for its lamb, Ireland for its beef, and Spain for its fresh produce – but many aren't trusted at all. Languishing at the bottom of the Trust Index are countries such as the USA and China.

The high level of trust in British food is not an accident, but the result of hard work across the supply chain over two decades. It has largely been driven by assurance schemes such as British Lion, Red Tractor, RSPCA Assured and the Soil Association as well as by the ongoing work of the Food Standards Agency. The data shows UK consumers recognise and trust these schemes to safeguard the quality of the food we eat.

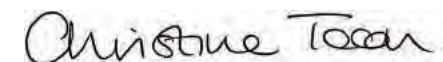
For 20 years now, Red Tractor has helped to make sure that food on UK shelves has been responsibly sourced, safely produced and comes from crops and animals that have been well cared for. We were formed in 2000 as a total food chain initiative to restore trust in

British farming after several high-profile food scares, including BSE, Salmonella, and Foot and Mouth disease, shocked the UK public's confidence in the food they ate. Looking at the Index, trust in the safety, quality, and traceability of UK food all score highly, although it is clear more can be done.

Having world leading standards for food safety and food production has successfully helped safeguard the UK from some of the outbreaks and food contamination incidences that have been seen in other countries in recent years including the e-coli outbreak in Romaine lettuce in the USA. It is our system of regulation and assurance schemes that means that while, according to the Centre for Disease Control and Prevention, 17% of people in the USA suffer from foodborne illnesses each year, that figure is just 1.5% in the UK.

This report is rich with data and insights that I feel will help the entire industry identify both what we are doing well and where collectively we can make improvements. For example, not all the places where we buy our food are trusted equally and neither are all our global trade partners who provide us with much of our food.

This is the first report of its kind, and we are hoping to repeat it every year. That way we can share regular and meaningful insights into the UK's trust in the food it consumes and ensure that Red Tractor remains a leading assurance scheme, supported by the whole food chain.



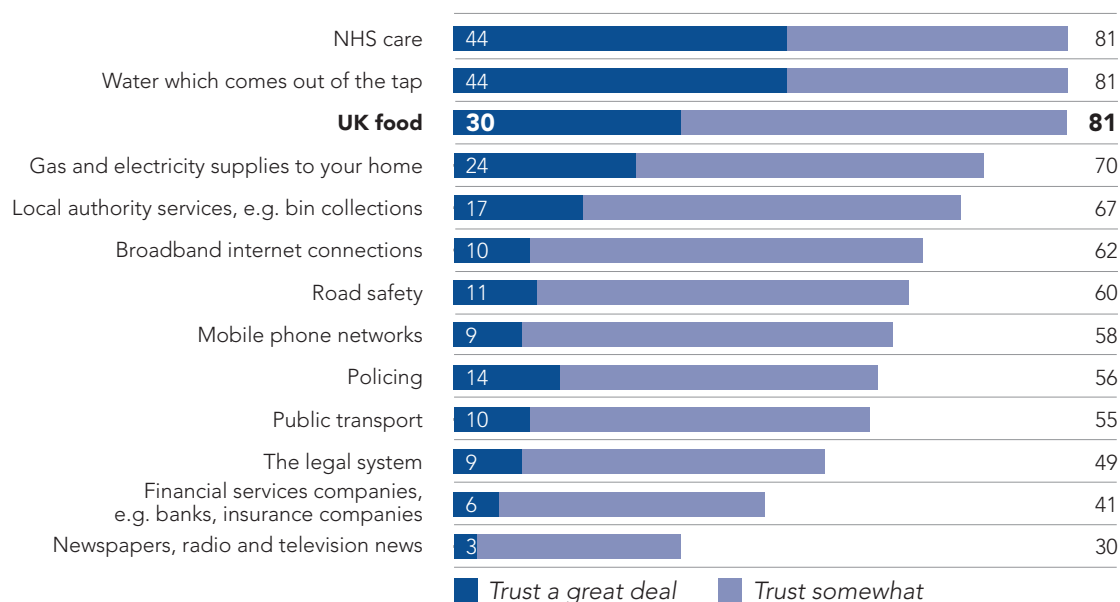
THE UK'S TRUST IN FOOD INDEX



UK food is trusted on a par with water and NHS care

Trust in aspects of UK society

Thinking about different aspects of life in the UK, to what extent do you trust in the following? Please think about each aspect in general rather than specific examples. N=3564



The overall level of trust in the UK's food is on a par with water quality and NHS care.

This represents a huge vote of confidence in the state of the nation's food, with food trusted more highly than other daily essentials, like gas and electricity, modern communications networks, or government services provided by local authorities (such as bin collections.)

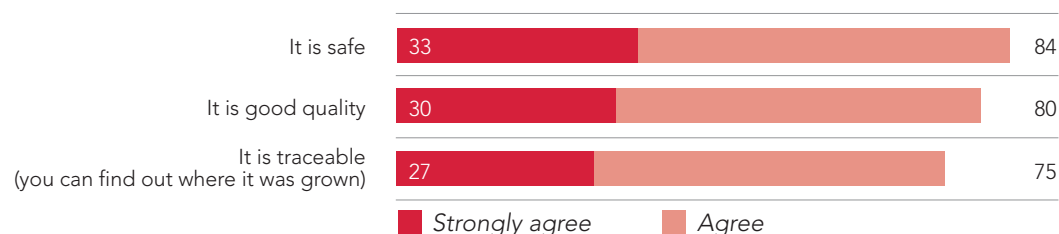
When looking at the proportion of the public who trust UK food 'a great deal', it is clear that trust in UK food still has some room for improvement.

The public overwhelmingly agrees that the UK's food is safe, traceable and good quality, although trust in the traceability of food lags behind confidence in food safety and quality. There is also a notable age gap: while 84% of those aged 65 and over think food is traceable, only 67% of those aged 18–39 agree.

Arguably, this is a result of older generations having lived through significant food crises such as BSE (otherwise known as Mad Cow Disease), Foot and Mouth disease, and the horse meat scandal, and have been reassured by the subsequent measures put in place by the food industry. Younger people who did not live through such moments seem to place far greater emphasis on the authenticity of a food product – in other words, whether the way it is labelled truly reflects what is being sold.

Aspects of trust in food

Do you agree or disagree with the following statements about food grown in the UK? N=3564



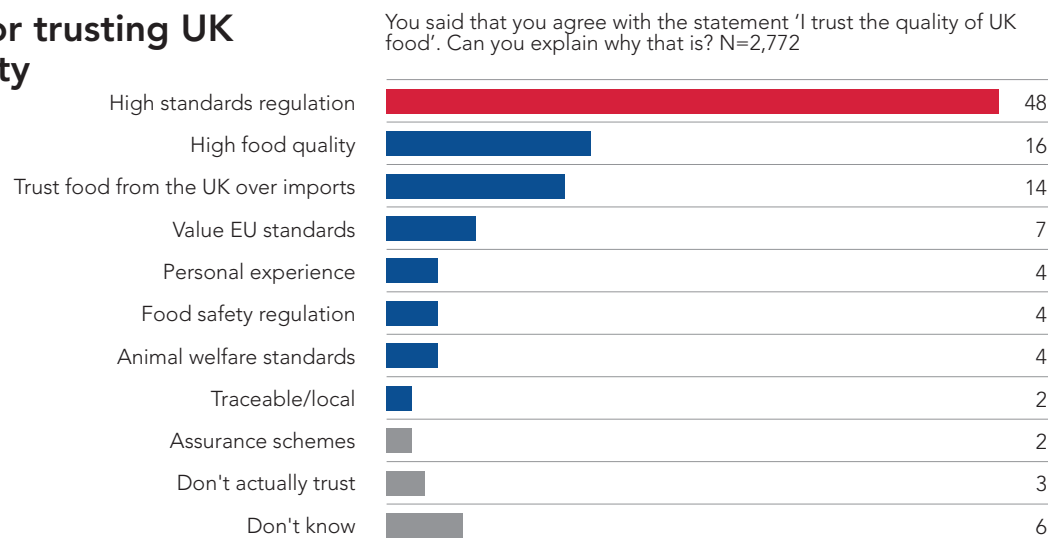


UK'S STANDARDS REGIME THE REASON FOR HIGH CONSUMER TRUST

- **48%** of respondents say they trusted UK food specifically because of high standards and regulation
- Trust in the food we consume is **very high** across all the places where shoppers buy food to prepare themselves
- The more **packaged and processed** the food is, the levels of trust falls

UK'S standards regime the reason for high consumer trust

Reasons for trusting UK food quality



At the heart of the general public's trust in UK food is an implicit trust in the systems of regulation and assurance that exist in the UK.

This might reflect the importance of the UK's standards regime which has been at the centre of public debate over the past 18 months, from concerns around foods with high fat, salt, and sugar content, through to concerns over the impact of Brexit on food standards.

While only a few consumers can name specific assurance schemes or the UK food regulator, there is a broad conviction that the regulatory system that exists is doing its job in the background, ensuring food is safe and of good quality. Of those surveyed, 48% mention high standards and regulations as being something they trust in.

14% of respondents say they trust UK food specifically because they assume it comes from the UK, preferring it to imported food.

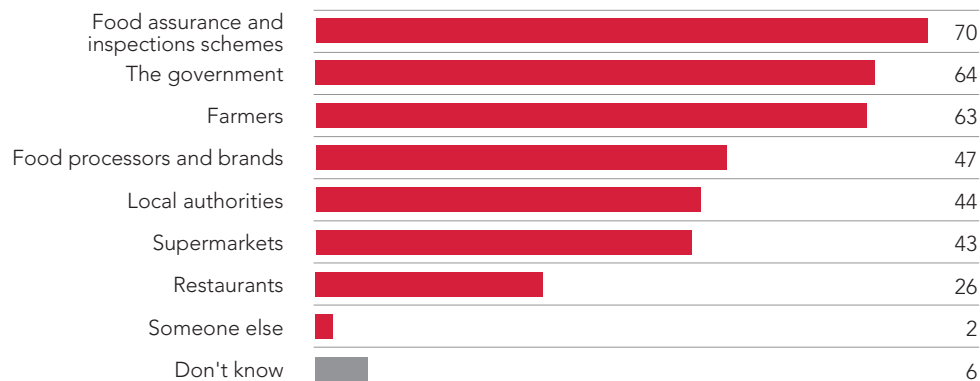
On the other hand, for a smaller proportion of respondents (7%), their trust in food is connected to our relationship with the EU. These respondents show an awareness that the EU's food standards are still being replicated in the UK, or they generally trust food imported from the EU.



Food safety and quality from assurance schemes

Responsible for food safety and quality

Who do you think is most responsible for ensuring food is safe and good quality? Please select as many as you like. N=3564



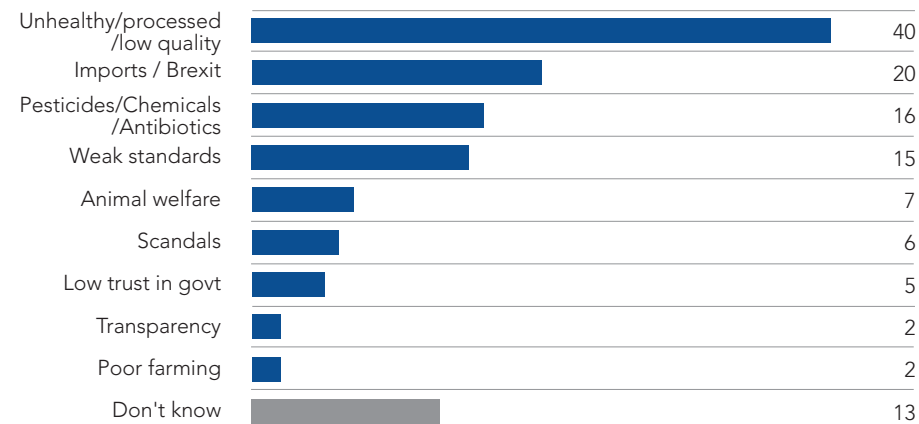
Respondents feel that inspection and assurance schemes play a greater role than the Government or farmers in ensuring that the UK's food is safe and of good quality.

This suggests there is an important continuing role for assurance schemes in the UK in order to maintain public confidence and trust in British food.

A minority of people do not trust UK food

Reasons for NOT trusting UK food quality

You said that you disagree with the statement 'I trust the quality of UK food'. Can you explain why that is? N=174



A lack of trust in UK food is very much a minority position.

Of the few respondents who said that they don't trust UK food, 40% base their criticism on the belief that the food available to them is unhealthy, overly processed, or in other ways low quality.

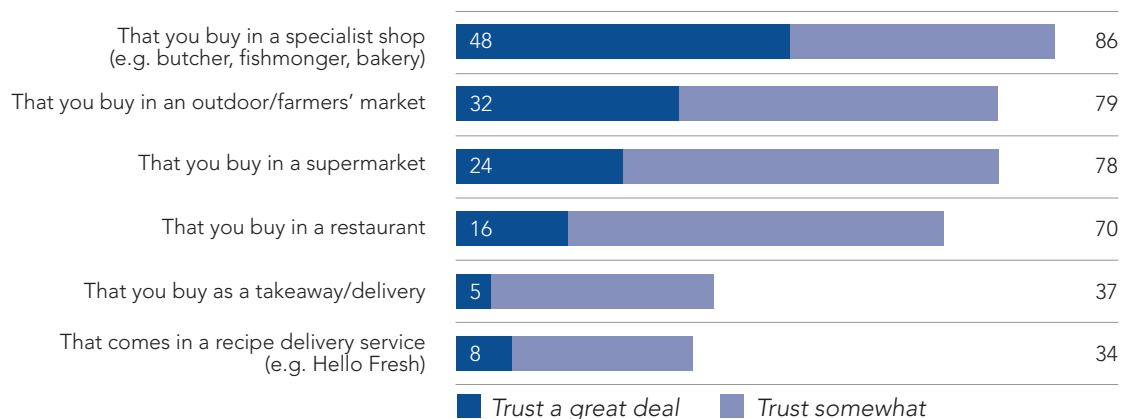
One respondent commented that "there is a lot of cheap, low-quality food in terms of nutrition."

A further 20% base their criticism of UK food on the fear that UK food standards will drop because of Brexit and the UK now having the ability to alter food standards freely (potentially to secure future trade deals outside of the EU.)

Trust much higher in food bought in shops than in takeaways

Trust in places to buy food

To what extent do you trust the safety and quality of the food that you buy in each of the following places? N=3564



Trust in the food we consume is very high across all the places where shoppers buy food to prepare themselves.

This is especially the case with specialist and 'hyper-local' shops. The UK public appears to instinctively trust food that it perceives as local (e.g. from local butchers or bakers.)

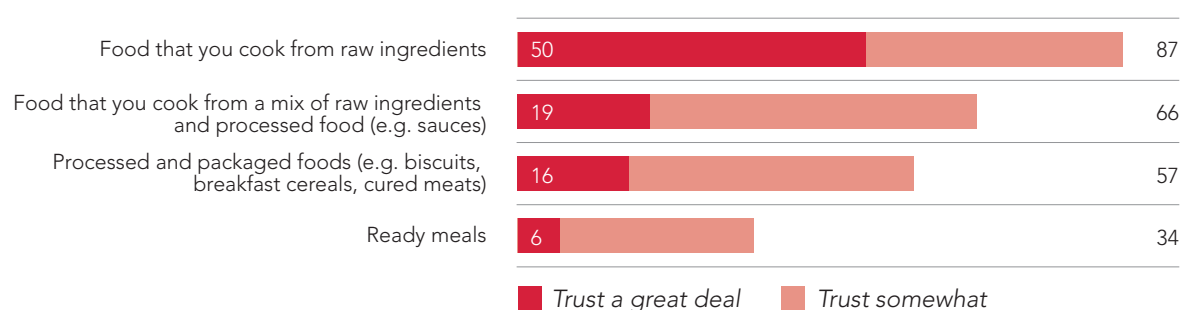
The level of trust falls slightly for food prepared in restaurants, although it is still high overall.

Levels of trust fall much lower for food from takeaways and deliveries. This may be due to a concern about safety or possibly a concern about the healthiness (e.g. high in fat, salt and sugar) of these types of food. It might also reflect a lack of transparency in restaurant supply chains.

Trust in recipe boxes delivered to your door is much lower, partly because 42% of people say they don't have an opinion one way or another.

Trust in preparations of food

To what extent do you trust the safety and quality of the following types of food? N=3564



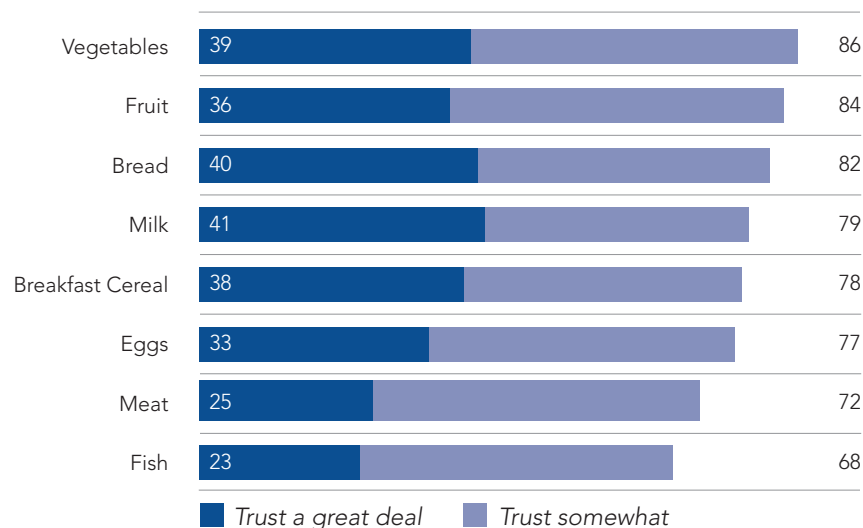
Understandably, people trust food they prepare themselves far more than food pre-prepared for them. This suggests that there isn't a significant concern about preparing food badly in our own homes.

The more packaged and processed the food is, the levels of trust falls. Again, this is most likely to do with the health associations (e.g. high in fat, salt and sugar) with those types of food rather than consumers believing them to be unsafe.

Trust much higher in food bought in shops than in takeaways (continued)

Trust in certain foodstuffs

To what extent do you trust the safety and quality of the following types of food, bought from a supermarket or shop? N=3564



Trust is high across the board for all key categories of food.

Eggs are broadly comparable with milk (although more people trust milk "a great deal"), suggesting that the salmonella concerns that impacted trust in UK food 30 years ago are a distant memory.

Trust in meat and fish is somewhat lower. This is possibly because of increasing awareness of vegetarian and vegan diets, but also possibly the result of an awareness that meat and fish can 'go off' quickly and the impact on health of poor-quality meat and fish can be greater.

Lower consumer confidence in fish might be explained by an awareness that fish is more difficult to prepare than meat.

Of the places we buy food:

86%
of respondents trust **specialist shops**

78%
of respondents trust **supermarkets**

34%
of respondents trust **food delivery services**



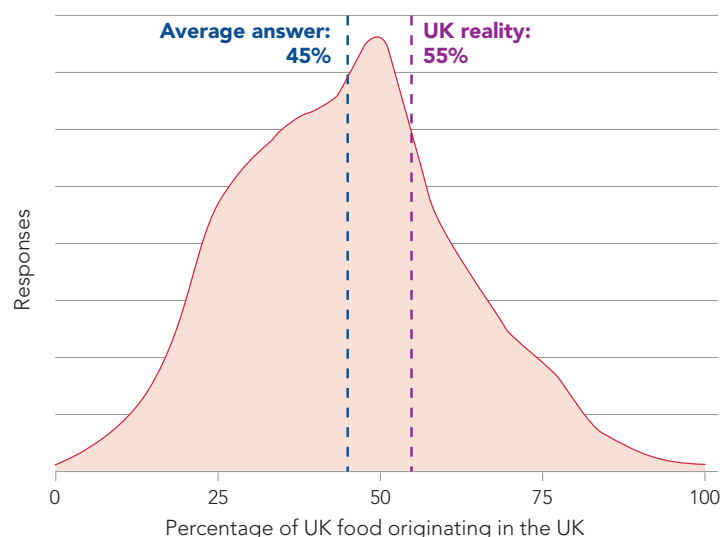
IRELAND AND NEW ZEALAND FOOD MOST TRUSTED, USA AND CHINA NOT TRUSTED

- The public **underestimates** just how much of our food originates in the UK
- **Ireland** tops the table as the most trusted exporter of food to the UK
- Of the rest of the world, **New Zealand** is the most highly trusted

UK consumers under-estimate how much food the UK produces

Estimations of UK food sourced in the UK

Thinking specifically about food... What percentage of the food eaten in the UK do you think originated in the UK? By 'originated' we mean it was farmed, grown, or caught in the UK. N=3564



Despite their high level of trust in food in the UK and originating from the UK, many people are unaware of how much of our food originates here.

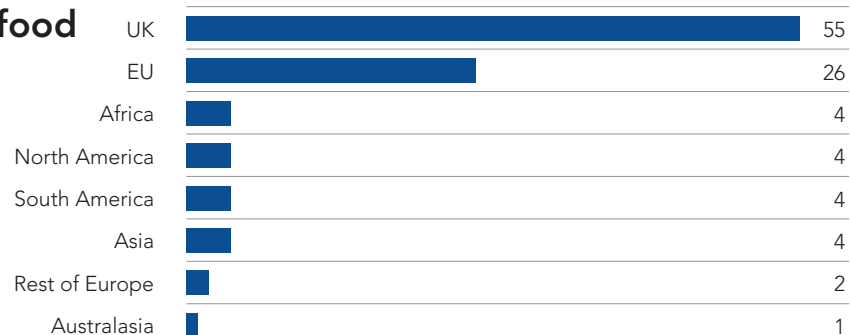
On average, the public thinks 45% of our food comes from the UK, compared to the official government data showing the figure is 55%.

There was significant variation in respondents' answers on this topic, showing that the public has little idea how much of the food they consume the UK produces.

A third of the population guessed lower than 40% and 16% higher than 60%. Only 31% of the population guessed within 10% of the correct figure.

People over the age of 65 are more likely to get it right than anyone younger. There's no difference in the accuracy of the responses between men and women.

Actual sources of UK food

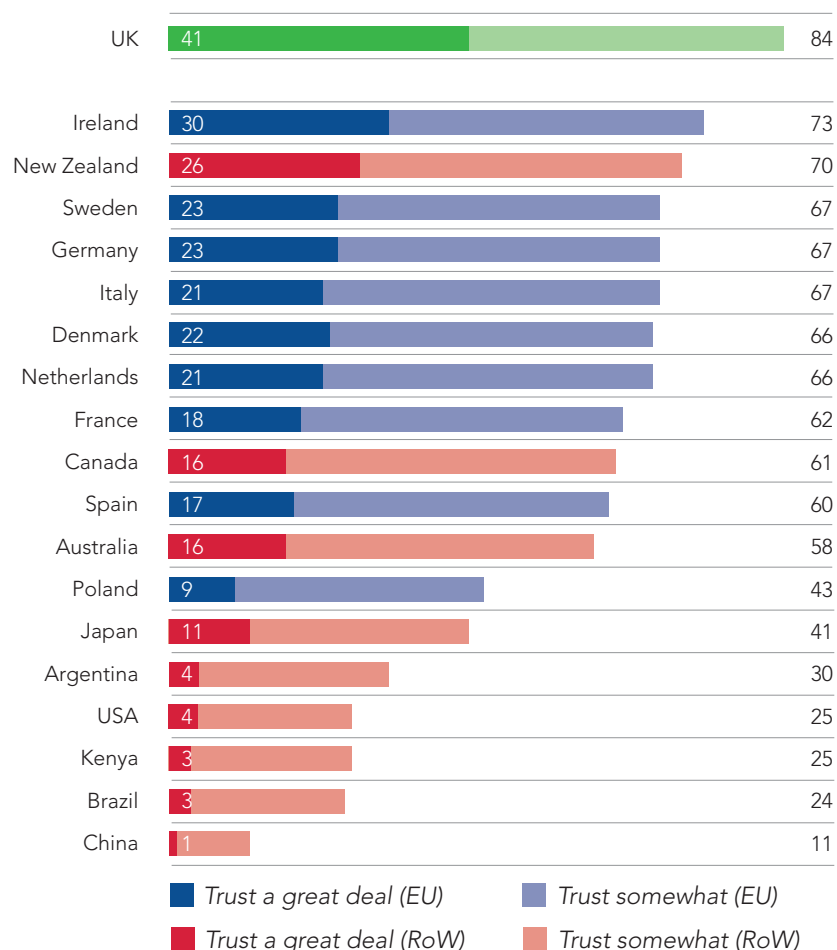


<https://www.gov.uk/government/statistics/food-statistics-pocketbook/food-statistics-in-your-pocket-global-and-uk-supply>

EU countries among the most trusted for food imports

Trust in food from different countries

To what extent do you trust food that originates in the following countries? N=3564



Generally speaking, the closer to home a food product is made the higher the levels of trust in that product.

Levels of trust in food from the EU remain high. This is especially the case for food produced in Ireland, which tops the table as the most trusted exporter of food to the UK.

After Ireland, the major western EU countries are all trusted similarly, and more highly than the rest of the world. Poland is the outlier, with much lower levels of trust.

Of the rest of the world, New Zealand is the most highly trusted, followed by other major Commonwealth nations – Canada and Australia. Again, this likely reflects close cultural, historical, and social ties.

The USA is comparatively little trusted – only 25% total trust – alongside Kenya and Brazil. China is the least trusted of all the countries respondents were asked about.

The varying levels of trust in food from different countries raises significant questions and challenges for future UK trade policy.

It also suggests that in a post-Brexit world, there may be increased importance placed on the presence of assurances scheme logos on food products in order to reassure consumers that what they are buying can be trusted.

EU countries among the most trusted for food imports (continued)

Not including the UK, which countries would you like the UK to import the following food and drinks from? Please select all that apply for each food & drink group. N=3564

	Beef	Chicken	Pork	Lamb	Apples	Dairy
Ireland	52	43	42	44	41	49
France	25	26	25	24	40	42
Germany	28	26	32	24	31	34
Netherlands	24	26	28	24	33	40
Denmark	24	25	37	23	29	36
Italy	23	24	25	21	35	39
Sweden	25	26	26	23	29	37
New Zealand	22	17	18	50	27	23
Spain	21	22	24	20	41	27
Canada	23	18	20	18	27	22
Australia	24	16	17	28	25	18
Poland	15	16	20	16	25	22
Japan	14	11	10	9	15	11
Argentina	28	7	8	7	13	8
USA	11	8	8	7	17	10
Brazil	15	7	6	7	14	7
Kenya	5	5	5	5	15	5
China	3	4	4	3	6	3

Key

	Most trusted
	Second most trusted
	Third most trusted

Trust for imported food varies across foodstuffs.

Beef

Irish foodstuffs are well trusted across the board, though Ireland is particularly highly trusted for beef. The reputation of Argentinian steak pushes it much higher than we see for other Argentinian produce, but the overall levels of trust are still fairly low.

Pork

Denmark has a strong reputation for pork products which is reflected in the relative enthusiasm for those imports. Trust in German pork is also relatively high, perhaps because of an association with the sausage meats for which Germany is famed.

Lamb

Lamb is the only foodstuff where Ireland is not the most trusted country. Instead, New Zealand takes the top spot, as familiarity with New Zealand lamb shines through. Lamb is also the product that British people are most comfortable being imported from Australia.

Chicken

Trust in chicken produce largely follows the pattern of other meats, with Ireland on top followed by other large western EU states. There is no single country with a standout reputation for that particular meat, unlike pork (Denmark), beef (Argentina) or lamb (New Zealand). The USA gets a low score here, a possible reflection of the ongoing debate and concern about chlorinated chicken.

Apples

Apple imports have more consistent levels of trust than other foods. Consumers across the UK are generally more comfortable with the idea of fresh produce from mainland Europe than meat products from the same countries.

We also see greater levels of confidence in apple imports from countries that have low levels of trust overall. For example, 25% of respondents were happy with the idea of apples from Poland and 15% happy with them coming from Kenya – a higher score than we see for any other product.

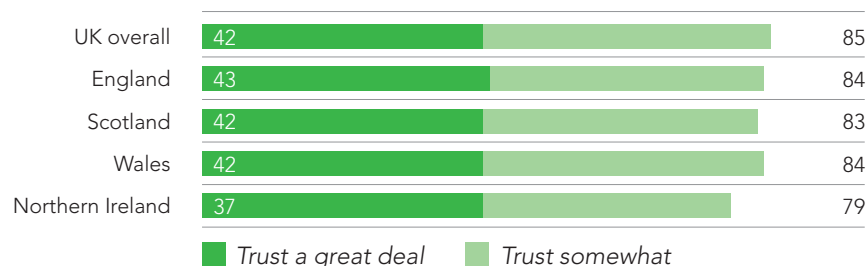
Dairy

Dairy scores are also generally higher than we see for meat products. France, Italy and the Netherlands all score more highly than they do for other products, possibly driven by their reputation for imported cheese or by proximity to one another (specifically in the case of France and the Netherlands.)

Scottish and Welsh consumers most trust locally sourced food

English residents

To what extent do you trust food that originates in the following countries? England N=2463, Scotland N=514, Wales N=507

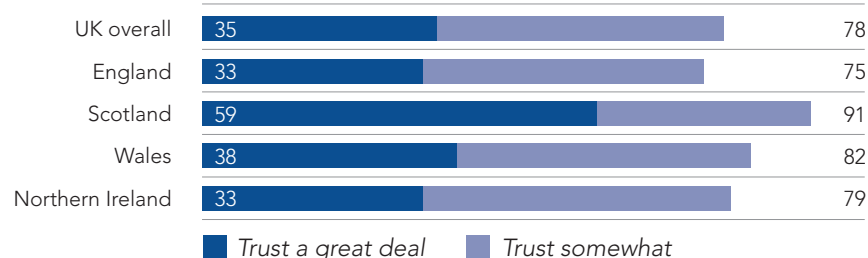


People in Scotland, and to a lesser extent in Wales, have a greater level of trust in food that originates from their own nation.

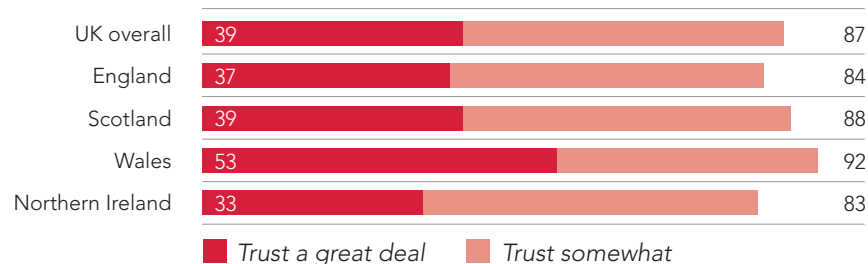
By contrast, people who live in England display very consistent levels of trust in food across the UK wherever it comes from.

The slight exception is Northern Ireland – people in England and to a certain extent those in Wales are slightly less trusting of food from Northern Ireland.

Scottish residents



Welsh residents



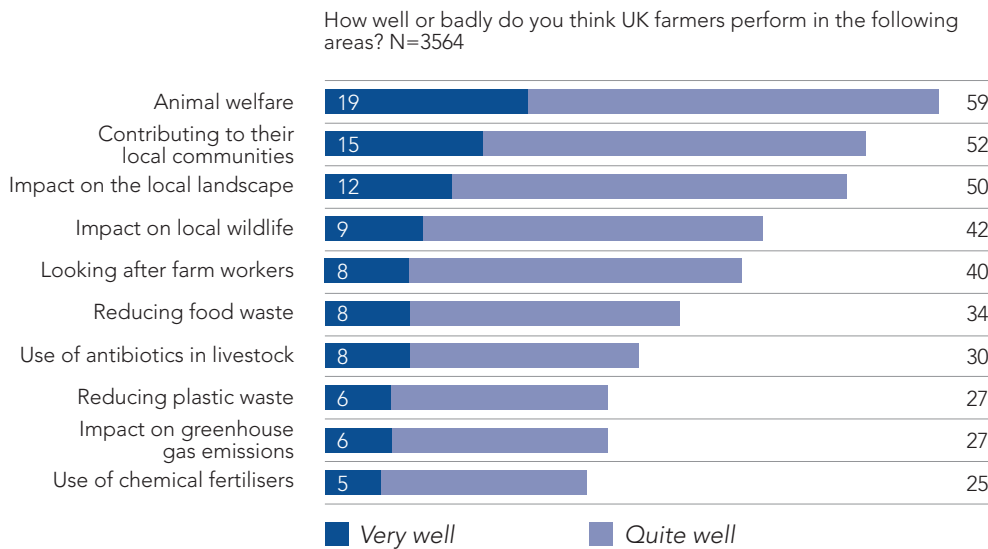


FARMERS TRUSTED ON ANIMAL WELFARE BUT NOT ON CARBON EMISSIONS

- UK farmers are seen as **performing well on animal welfare**, contributing to the community, and having a positive impact on the local landscape
- Believing farmers are performing well on **animal welfare drives trust** in UK food

Farmers most trusted on animal welfare

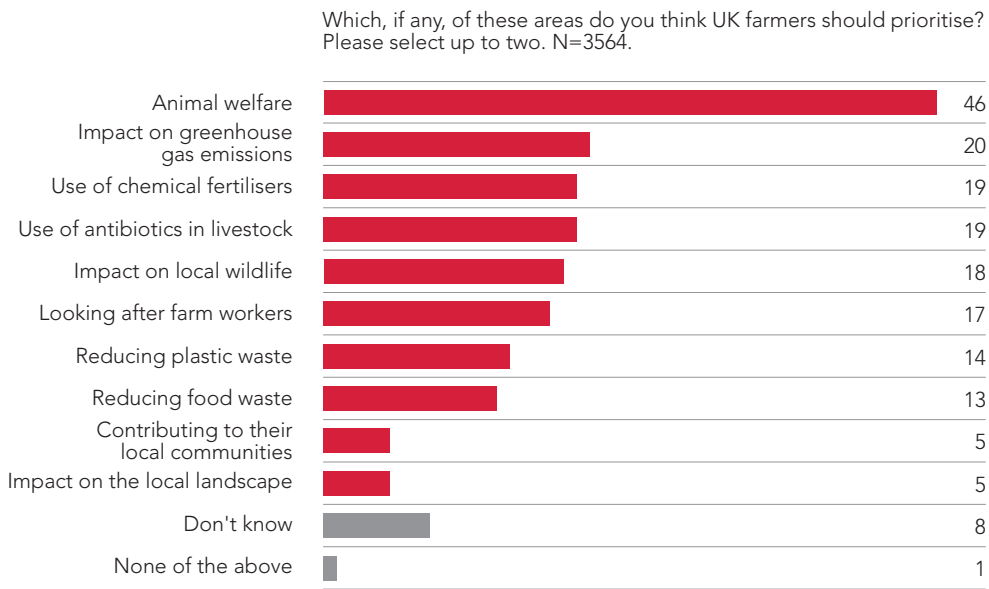
UK farmers' performance



UK farmers are seen as performing well on animal welfare, contributing to the community, and having a positive impact on the local landscape.

Farmers are less trusted on issues such as the use of chemical fertilisers and on plastic waste.

Priorities for farmers

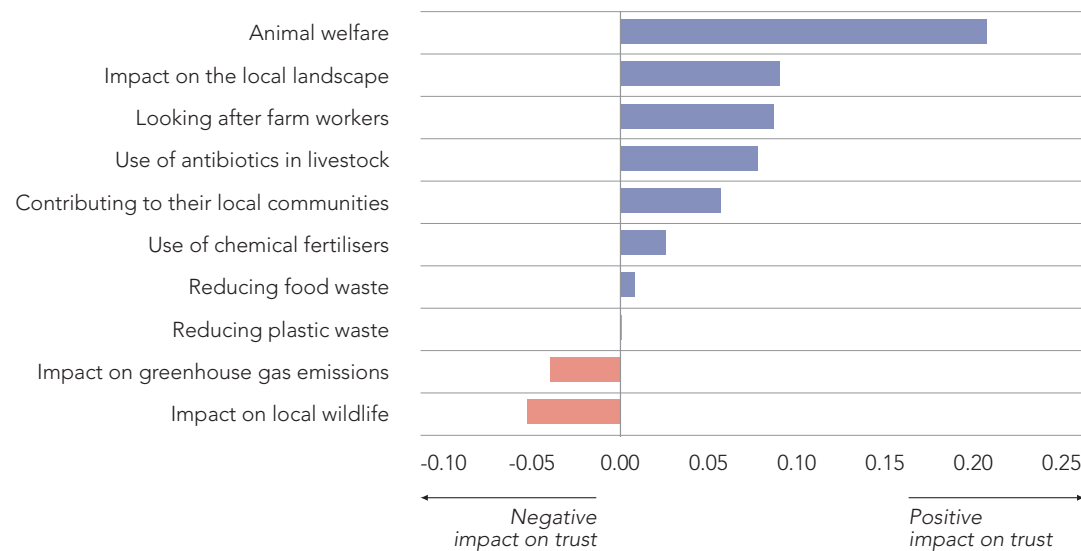


However, in the eyes of most consumers, the priority for farmers is overwhelmingly to ensure high standards of animal welfare. All other issues are secondary, although it is notable that carbon emissions are now seen as the second most important area of responsibility, above the use of fertilisers and impacts on local wildlife.

Farmers most trusted on animal welfare (continued)

Drivers of trust in food

Regression of "Trust in Food" (Dependent variable) against "How well or badly do you think UK farmers perform in the following areas?" and demographics (Independent variables). N=3564, Adjusted R² = 0.23



A statistical technique known as “**regression analysis**” allows us to see which attitudes about farmers’ performance have the greatest impact on overall trust in food.

There are obviously a huge number of factors which influence overall trust in food, but this work suggests that farmers’ performance (combined with respondents’ different backgrounds) explains about a quarter (23%) of the variation in trust.

The analysis also allows us to say which aspects of farmers’ performance are most and least important as far as the public is concerned. The data suggests that believing that farmers are performing well on animal welfare is by far the most powerful belief in driving overall trust in UK food, followed by the impact on the local landscape and treating farm workers well.

In contrast, localised impacts such as use of fertilisers, reducing food waste, and reducing plastic waste have essentially no impact on overall levels of trust in UK food.

A man and a woman are standing in a grocery store, looking down at a woven basket. The woman is on the left, wearing a yellow top, and the man is on the right, wearing a light blue t-shirt. They are both focused on the basket, which contains some green leafy vegetables. The background is slightly blurred, showing shelves stocked with various products.

PACKAGING AND LABELLING IMPACTS CONSUMER TRUST

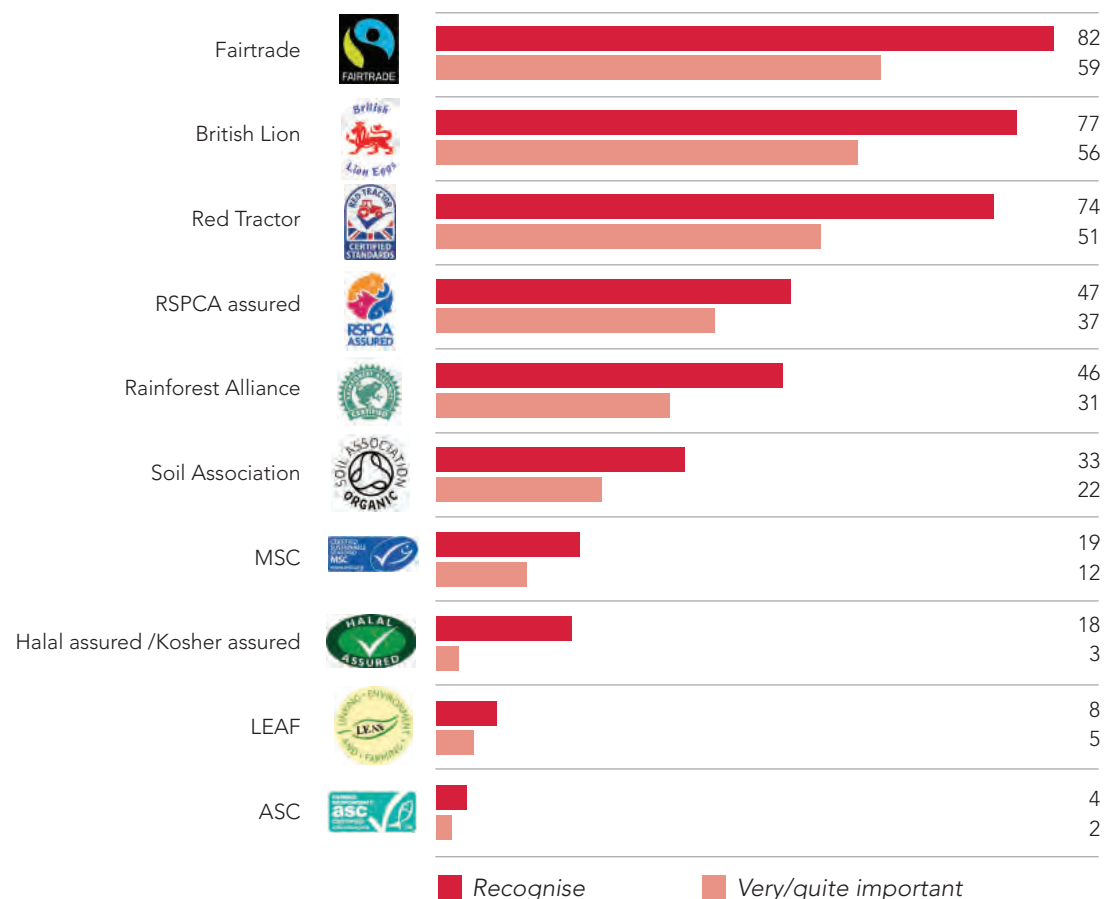
- **Ingredients, health indicators, and country of origin** are the packaging information shoppers most often pay attention to
- **47%** of people report paying attention to food assurance scheme logos **"always"** or **"often"**

Food scheme logos build trust in food

Scheme logos

Which, if any, of the following food packaging logos do you recognise? Please select all that apply. N=3564

How important are each of these logos to you when making choices on what food to buy? (Asked of those who recognised each logo)



Of the food schemes that the public is aware of, the Fairtrade logo is the most recognised, and considered the most important by UK consumers when choosing to buy a food product.

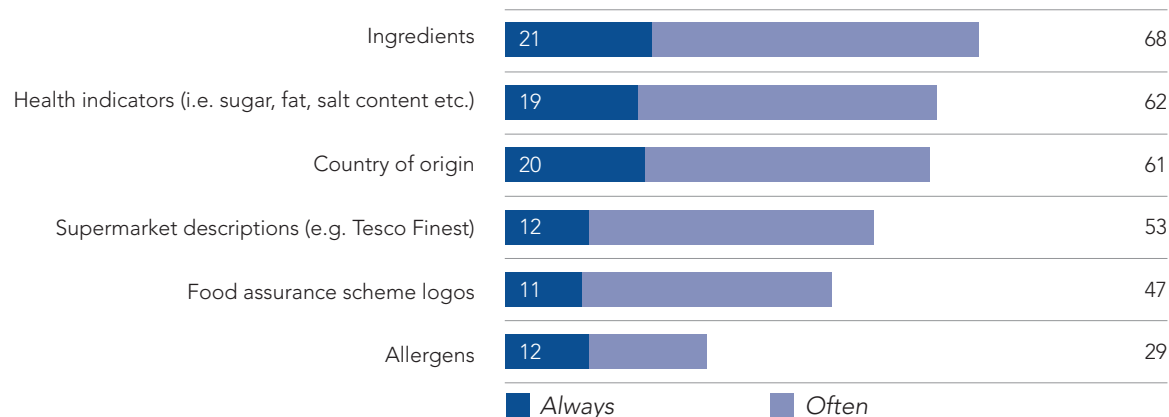
This is quickly followed by both the British Lion and Red Tractor assurance scheme logos.

Recognition is similar across different demographic groups, with older people about 10 points more likely to recognise Fairtrade compared to younger people, and 15 points more likely to recognise Red Tractor.

Some packaging information matters more than others

Packaging information

When purchasing food in a supermarket, how often do you pay attention to the following information on the packaging? N=3564



Ingredients, health indicators, and country of origin are the packaging information shoppers most often pay attention to.

Food assurance scheme logos are somewhat less important, although 47% of people still report paying attention to them “always” or “often”.

Demand for information on allergens is rising, with 12% of respondents saying that they always look for that information before making a food purchase, reflecting the growth of allergies in children and families across the UK.



Methodology

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All figures, unless otherwise stated, are from research conducted by YouGov Plc. Total sample size was 3,564 adults, including oversamples in Scotland (n=514) and Wales (n=507). The figures have been weighted and are representative of all UK adults (aged 18+). Fieldwork was undertaken between 22nd July - 4th August 2021. The survey was carried out online.

Full data tables can be found [here](#).

Regression analysis was conducted by Headland Consultancy. Dependent variables were coded ordinally in a linear regression with "don't know" responses discarded from the model. Independent variables are as indicated, including ordinal demographic controls (age (5 categories), gender (2 categories), social grade (4 categories), education level (4 categories), ethnicity (2 categories)). Effect sizes, adjusted R^2 and standard error values are as shown on the charts. Further details of the models is available on request.

About Red Tractor



Founded in 2000, Red Tractor is a world-leading food chain assurance scheme that underpins the high standards of British food and drink. It is the UK's largest food and farm standards scheme and certifies products to rigorous standards from farm to pack.

The Red Tractor scheme uniquely delivers assurance on areas of food production from animal welfare, food safety, traceability, and environmental protection. Through its own, and partner schemes, it assures around 75% of British agriculture. All Red Tractor products are British – only food that is born, reared and grown in the UK can bear the logo.

The scheme was set up two decades ago by the food industry in the wake of the BSE and salmonella disasters. Working with UK producers, it has helped to establish British food and farming as the benchmark for quality across the world.

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