

THE UK'S TRUST IN FOOD INDEX

YouGov



Research conducted by YouGov
and commissioned by Red Tractor

A report on the nation's trust in the food it consumes

July 2022



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Trust in the UK's food

Darren Yaxley, Head of Reputation & Business Research, YouGov

The 2022 results once again show an encouragingly high level of trust in UK food quality and standards. However, there are some potentially worrying signs in the data. A quarter of respondents think that food quality in the UK has declined over the past two years, and two in five are concerned that new trade deals will affect food quality. Red Tractor has a role to play here in ensuring that consumers can continue to trust in the standards of food produced in the UK.

The research was carried out against the backdrop of the cost-of-living crisis. We know from [YouGov's Issues Tracker](#) that the economy is the most important issue facing the country and the results show that these concerns are having an impact upon some consumer behaviour in relation to food. Around half say they have made some changes to their purchasing decisions, with three in ten buying less meat (YouGov Profiles shows that Sainsbury's and Waitrose shoppers are most likely to do this), a quarter buying what they perceive to products produced to a lower standard, and just over one in ten buying less fruit and veg. Only a handful of consumers say they are now buying less British food though – testament to the high levels of trust they have in food which is produced in this country.

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Christine Tacon, Chair, Red Tractor

Founded in 2000, Red Tractor was created to help ensure British food is responsibly sourced, safely produced, and comes from crops and animals that have been well-cared for. Most crucially, we work to reassure consumers that safety and high standards are not sacrificed to make food affordable. We believe that everyone should have access to food that is safe, traceable, and farmed with care, regardless of their budget.

The inaugural *Trust in Food Index* in 2021 made it clear that food from the UK was incredibly well-trusted, more so than anywhere else in the world. That holds true again with this year's research.

The study has also revealed some significant shifts in consumer sentiment, as the effects of the pandemic, the war in Ukraine and the cost-of-living crisis take hold. Levels of trust have fallen in almost all UK institutions, with food experiencing the second biggest drop overall after utilities.

We wanted to understand how rising food prices are impacting buying behaviour. Five out ten (46 per cent) people told us they are changing what they buy, with 30 per cent of shoppers buying less meat, and worryingly 13 per cent buying less fruit and vegetables. Almost a quarter (24 per cent) of consumers are buying what they perceive to be food produced to lower food safety and animal welfare standards. The most troubling aspect of these findings is that the people who are feeling the greatest financial pressure are forced to make the largest dietary concessions.

Whilst overall trust in food bought in supermarkets remains high, the research found that only four in ten shoppers trust supermarkets, as people perceive that the food they are buying is produced to lower food safety and animal welfare standards.

There is a perception among consumers that by trading down, buying cheaper products, or switching to supermarket value ranges, they are eating food which is not sourced and assured to the same level as premium brands and ranges. This is clearly impacting trust and is bad news for the food industry.

However, when it comes to food and farming, the UK is one of the most regulated countries in the world. The strict regulations on food safety, animal welfare, and other aspects of food production, apply equally to value ranges as they do to premium products.

So, reinforcing 'British' is vital to retaining consumer trust. Going further, by identifying products as assured through schemes like Red Tractor or British Lion can address people's perception that 'cheaper means lower standards.'

Whilst some shoppers now struggle to afford the prime cuts, specialities, and their culinary treats, they shouldn't believe that they are sacrificing food safety, animal welfare, or the care for the environment when they switch to value ranges.

It is imperative that the industry – Red Tractor, retailers, food manufacturers, farmers and other assurance schemes – work together with the government to reassure shoppers that whatever their price range, they can be confident in the standards and safety of food that is produced in the UK. Affordable British food does not mean lower sourcing and production standards.

Assurance schemes play a vital role in protecting standards. Supermarkets should also play their part, by adopting food marques on all applicable food, including value ranges. Meanwhile government needs to tackle this issue head-on and make clear that foods standards and safety in the UK will not be surrendered because of price.

I have no doubt that trust can be rebuilt if the right steps are taken. As inflationary pressures continue to rise and budgets are squeezed further, we must take immediate action to reassure our most vulnerable consumers that they do not have to accept food produced to lower food standards.



Christine Tacon

- Trust in food has seen the second greatest drop of eight per cent
- Four in ten shoppers say they don't trust supermarkets
- 30% of shoppers are buying less meat, while 13% are buying less fruit and vegetables

Executive Summary

Changing trust in UK food

- Overall, trust in UK institutions has gone down in the past year. Trust in food has seen the second greatest drop of **eight per cent**, with only gas and electricity supplies losing more trust. Despite this drop, there are high levels of trust with 73 per cent of people trusting UK-produced food.
- The cost-of-living crisis is having a big impact on buying behaviour, especially on those in middle- and lower-income households. As inflation takes hold, they are having to make the decision to purchase less meat, fruit, and vegetables; and to trade down to food products and ranges that they perceive to be grown and reared to lower standards.
- **Four in ten** shoppers say they don't trust supermarkets, as people are buying what they perceive to be food produced to lower food safety and animal welfare standards.
- A strong assurance and regulatory system is the number one driver of trust for consumers, with **55 per cent** of respondents saying this was their top reason for trusting British food.
- Consumers have concerns about the long-term impact of Brexit and trade deals on UK food – **43 per cent** think the situation will get worse if trade deals lead to more imported foods.
- All elements of the food sector must work together with government to provide comfort to consumers that the food safety and the animal welfare standards of British-produced food remains high but also affordable. It should never be a choice between high standards and price, because of our system of strict regulations and assurance.

Methodology

All figures, unless otherwise stated, are from research conducted by YouGov Plc. Total sample size was 3,655 adults, including oversamples in Scotland (n=515) and Wales (n=505).

The figures have been weighted and are representative of all UK adults (aged 18+). Fieldwork was undertaken between 26th – 31st May 2022. The survey was carried out online.

This data is compared to research that was conducted last year (22nd July – 04th August 2021), also using YouGov Plc. The total sample size of 2021 was 3,564 adults, which was also weighted and representative of all UK adults. The comparison to 2021 data can be seen with the symbols '+', '-' or '='.

There is also new research included, with data from questions that were new to this year's poll, as specified. 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). Main shopper as an independent variable was also added for this year's research.

Using YouGov Profiles data from the same week that the 2022 research was conducted, household income levels (3 categories) and main supermarket used, have been used as analysis variables.

The definitions used throughout the report to refer to social grade and household income are as follows.

Social grade (via [National Readership Survey](#))

- A – Higher managerial, administrative, and professional
- B – Intermediate managerial, administrative, and professional
- C1 – Supervisory, clerical, and junior managerial, administrative, and professional
- C2 – Skilled manual workers
- DE – Semi-skilled and unskilled manual workers. State pensioners, casual and lowest grade workers, unemployed with state benefits only

Household income

- Lower = <£25,000 per year household income
- Middle = £25,000 - £59,999 per year household income
- Higher = £60,000+ per year household income



THE UK'S TRUST IN FOOD INDEX

A woman with long brown hair, wearing a white long-sleeved shirt and a grey plaid skirt, is standing in a supermarket aisle. She is holding a purple box in her hands, positioned over a red plastic shopping basket. The basket contains various items, including a bag of oranges and some packaged goods. In the background, other shoppers and supermarket shelves are visible, though slightly out of focus. The overall lighting is bright and even.

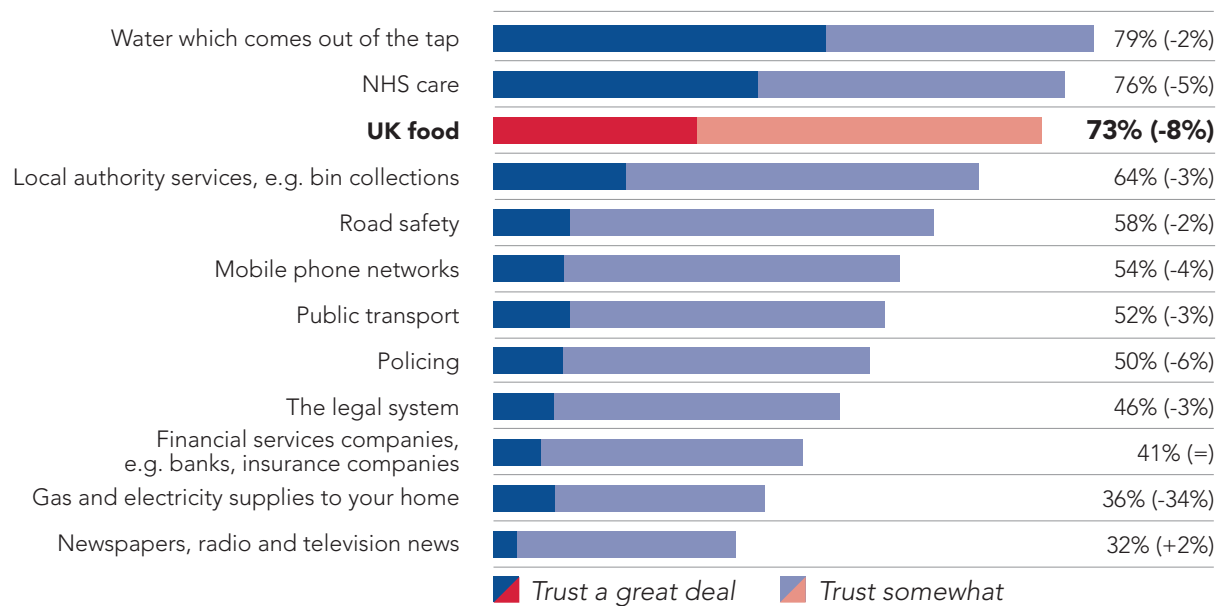
TRUST IN UK INSTITUTIONS HAS REDUCED ACROSS THE BOARD

- Consumer **trust** has **declined in almost all UK institutions** since the first Index was published
- Trust in **gas and energy suppliers** has seen the most severe change in levels of trust
- **NHS care, water, and food** remain in the **top three most trusted institutions**, but these too saw a drop

Trust has gone down across the board

Trust in aspects of UK society

To what extent do you trust the following?



The first Trust in Food Index in 2021 revealed that there were very high levels of trust in UK institutions, with trust in UK food on a par with NHS care and water quality.

This year's research has revealed a dramatically different picture. Consumer trust has declined in almost all UK institutions since the first Index was published.

Trust in gas and energy suppliers has seen the most severe change in levels of trust, dropping by 34 per cent. From the energy price cap increasing and challenger brands leaving the market, to the war in Ukraine and disruption to gas supplies, it is no surprise that people have lost trust in this key commodity.

NHS care, water, and food remain in the top three most trusted institutions, but these too saw a drop.

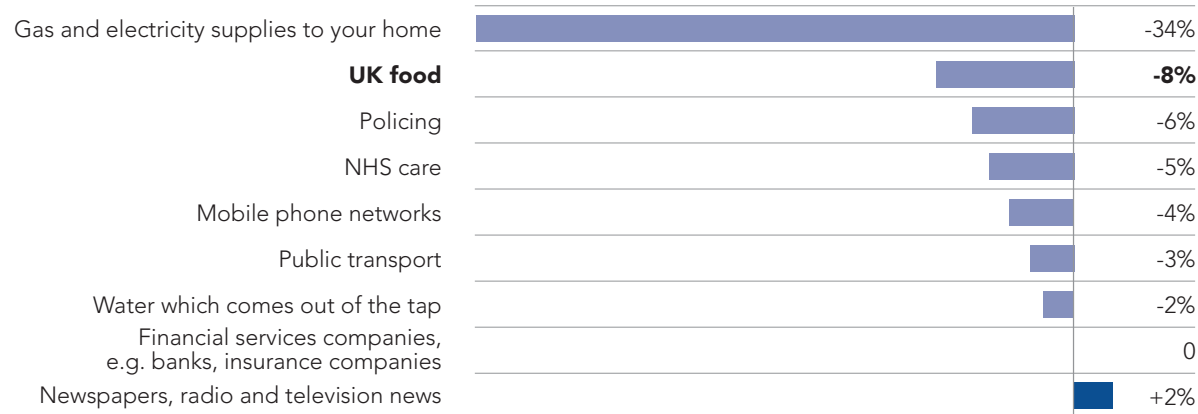
In fact, across the areas this research covered, although from a relatively low base, only trust in newspapers, radio, and television news has gone up since the publication of the first Trust in Food Index.



Trust in food has seen one of the biggest swings

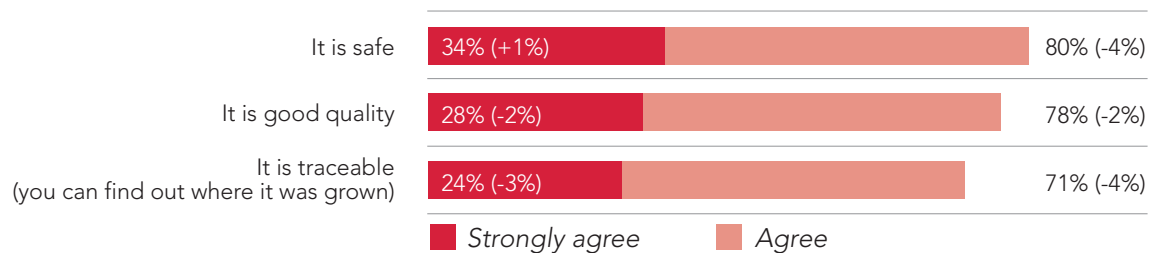
Changes in trust across UK life

To what extent do you trust the following?



UK food is safe, traceable and good quality

Do you agree or disagree with the following statements about food produced in the UK?



Trust in food sees one of the largest falls

Whilst approximately two-thirds of people still agree that food in the UK is safe, changes in consumer trust in food has seen one of the biggest swings of all aspects of UK society, with an eight per cent decrease in trust since 2021.

Trust that food is safe and traceable have declined by four per cent, which reflects some of the concerns people have about food due to incoming trade deals and the impact of the cost-of-living crisis.



Trust in food is most impacted among lower earners

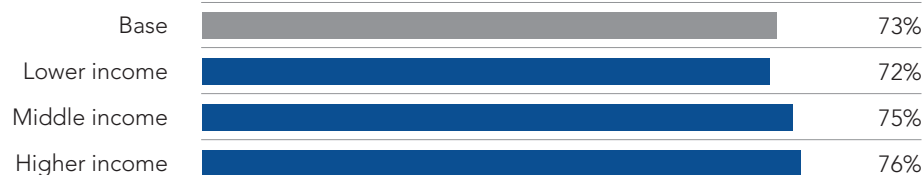
Trust in food varies across different demographics

To what extent do you trust in the following?
Answer: UK food. Demographic breakdown

Trust in UK Food across social groups



Trust in UK Food across household income bands



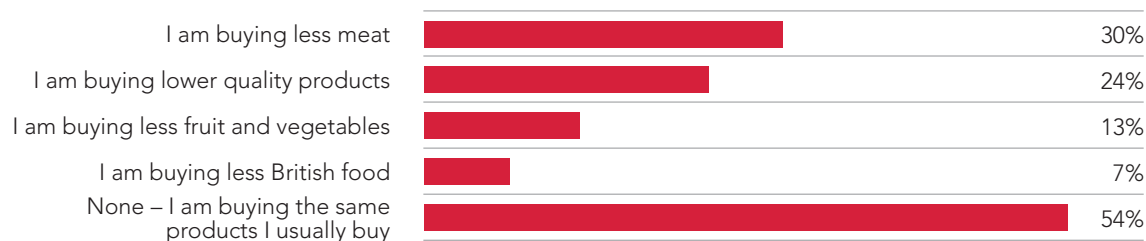
Trust in food is declining more sharply amongst lower income groups, with as much as a 13 per cent drop in trust among those in skilled, manual employment, with a drop in trust from 84 per cent in 2021 to 71 per cent.



Rising food prices are changing shopping habits

Impact of cost of living crunch

How is the cost of living rise impacting your purchasing decisions? (New question for 2022)



One of the key reasons we are seeing a change in consumer sentiment is the cost-of-living crisis.

Grocery price inflation hit 5.9 per cent (FSA, June 2022), its highest level since December 2011. Rising prices for food and drink resulted in the largest upwards contribution to the rise in the Consumer Price Index between April and May (ONS, May 2022).

Against that backdrop, shoppers are being forced to change their buying habits.

46 per cent of respondents said they were changing their buying behaviour, with changes to habits seen across all supermarkets.

24%

of shoppers say they are **buying lower standard products** as they trade down, rising to **29% among those on lower incomes**

30%

are **buying less meat**, rising to **35% those on lower incomes**

13%

are **buying less fruit and veg**, rising to **29% among lower income households**



Rising food prices are changing shopping habits (continued)

Changes in shopping habits across different income groups

How is the cost-of-living rise impacting your purchasing decisions? (New question for 2022)



The change in purchasing of meat across income bands comes at a time when the cost of meat has risen significantly. In the three months to May the cost of lamb increased by 10.6 per cent, pork by four per cent, and beef by six per cent (AHDB, May 2022).

The meat production and processing industry is facing a range of challenges alongside the rising costs of feed and fertiliser, but also challenges around access to labour and wholesale prices.



Perception that cheaper means lower standards

Trust in the food system

How much do you trust these channels?
(Adapted question for 2022)



One of the most striking findings from the research is that four in ten people do not trust food bought from UK supermarkets*, suggesting that as people switch to value ranges, there is an assumption that standards are weaker. This is despite the reality that most British-sourced value ranges and brands are Red Tractor assured to the same high UK specifications as the equivalent premium options.

Specialist retailers – such as butchers – remain well-trusted, but there has also been a drop of seven per cent compared to last year. This is especially notable given the context of the cost-of-living crisis and the barriers those on lower incomes face accessing food that is considered a higher standard and more trusted than food available in supermarkets, alongside the perceived changes in standards between value and premium foods.

Restaurants and takeaways sit at the other end of the spectrum, with much lower levels of trust generally although they have seen a nine per cent increase in trust since the first Index. Lower levels of trust may be due to concerns around the safety or health impacts of 'fast food' – in particular, in response to a renewed push from government on tackling obesity – as well as a lack of transparency around supply chains, ingredients, and allergens.



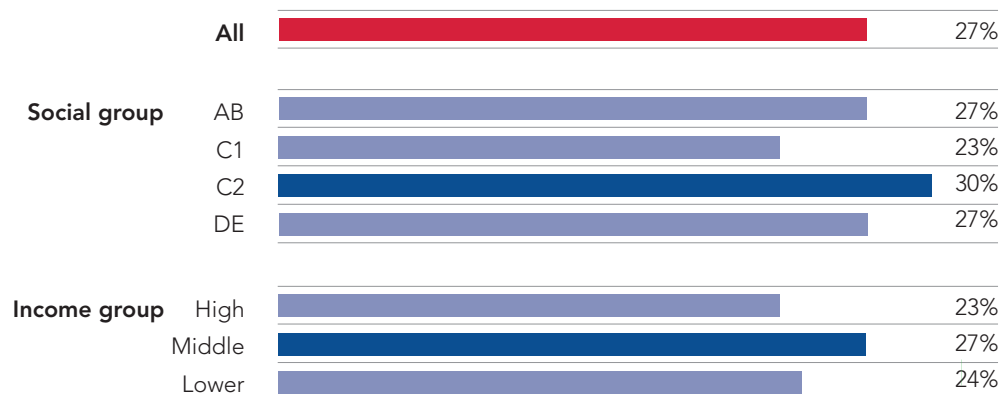
* In the Trust in Food Index 2021, 78% of people said they trusted the safety and quality of food they bought in supermarkets. This year, only 58% of people trusted retailers. The striking 20 per cent change in trust suggests that as people trade down to value ranges, standards are assumed to be weaker.

Brexit is also having an impact on perception

Perceptions of standards across demographic groups

Have you noticed any changes in the quality of food over the past two years? (New question for 2022)

% of people who think quality of food has got worse



27 per cent of survey respondents said they felt food quality has worsened over the last two years. Among consumers in the social group made up of skilled manual workers (C2, e.g., tradespeople, healthcare assistants), this perception is even stronger, with 30 per cent of people believing that quality is worsening, compared to 27 per cent nationally.

This follows significant media coverage of trade deals potentially allowing in large amounts of food produced to lower standards of animal welfare and product safety, with some countries producing food to standards not allowed in the UK due to our rigorous regulations.

"We currently have regulations in place to protect food quality however following Brexit it does feel like these are relaxing which concerns me."

"We have decent food standards. Well, we did. After Brexit I'm not so sure."

"I'll be far less trusting the further we progress into Brexit."

"I know there are certain standards food products must adhere to. However, since Brexit I am less trusting."

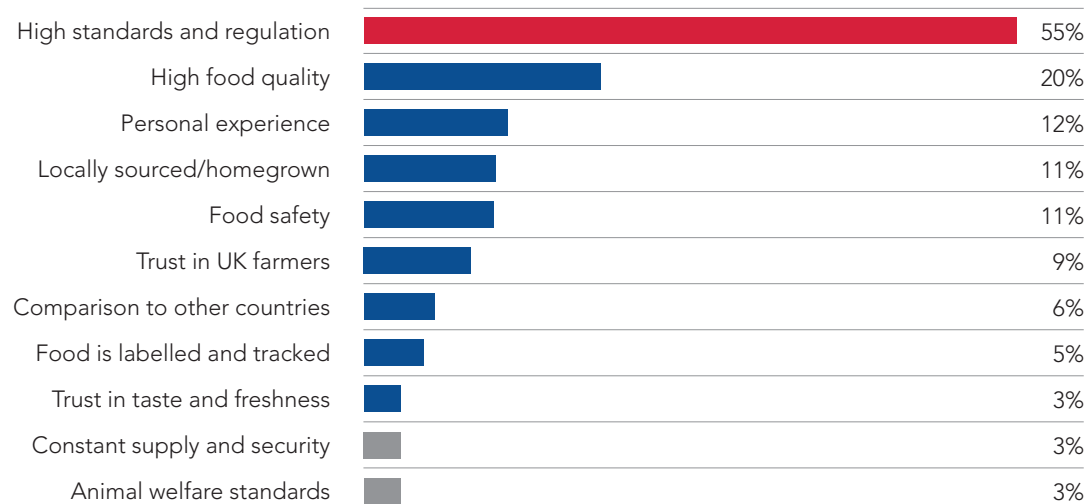
DRIVERS OF TRUST IN FOOD

- Shoppers believe the **UK has a system of high standards and regulation**
- **Food assurance and inspection schemes** are considered most responsible for ensuring safety and standards
- **Fair Trade, British Lion** and **Red Tractor** remain the most recognised food marques

Food assurance and inspection schemes are the biggest driver of trust

Reasons for trusting UK food

Why do you agree with the statement
"I trust the quality of food available in the UK"?



The most overwhelmingly important driver of trust for consumers is the belief that the UK has a system of high standards and regulation. When asked to identify why they trusted UK food, 55 per cent of respondents said this was their number one reason.

"I believe UK farmers and other producers are generally trustworthy and wouldn't risk shortcuts or malpractices"

"Because I believe that there is stringent testing of foods within the UK and standards of production are high."

"Because we are very specific about standards."

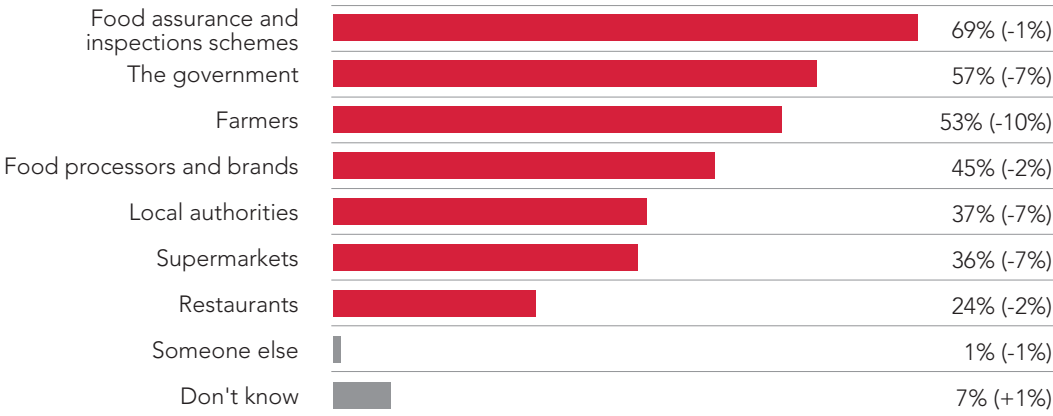
"There are rigorous regulations that the food industry has to adhere to"

"It is good quality but expensive."

Increased recognition of assurance schemes

Responsibility for food safety and standards

Who do you think is more responsible for ensuring food is safe and to a good standard?



Food assurance schemes play a vital role in protecting standards for consumers, particularly as people have less disposable income to spend on food. 69 per cent of respondents pointed to food assurance schemes to ensure food is safe and to a high standard.

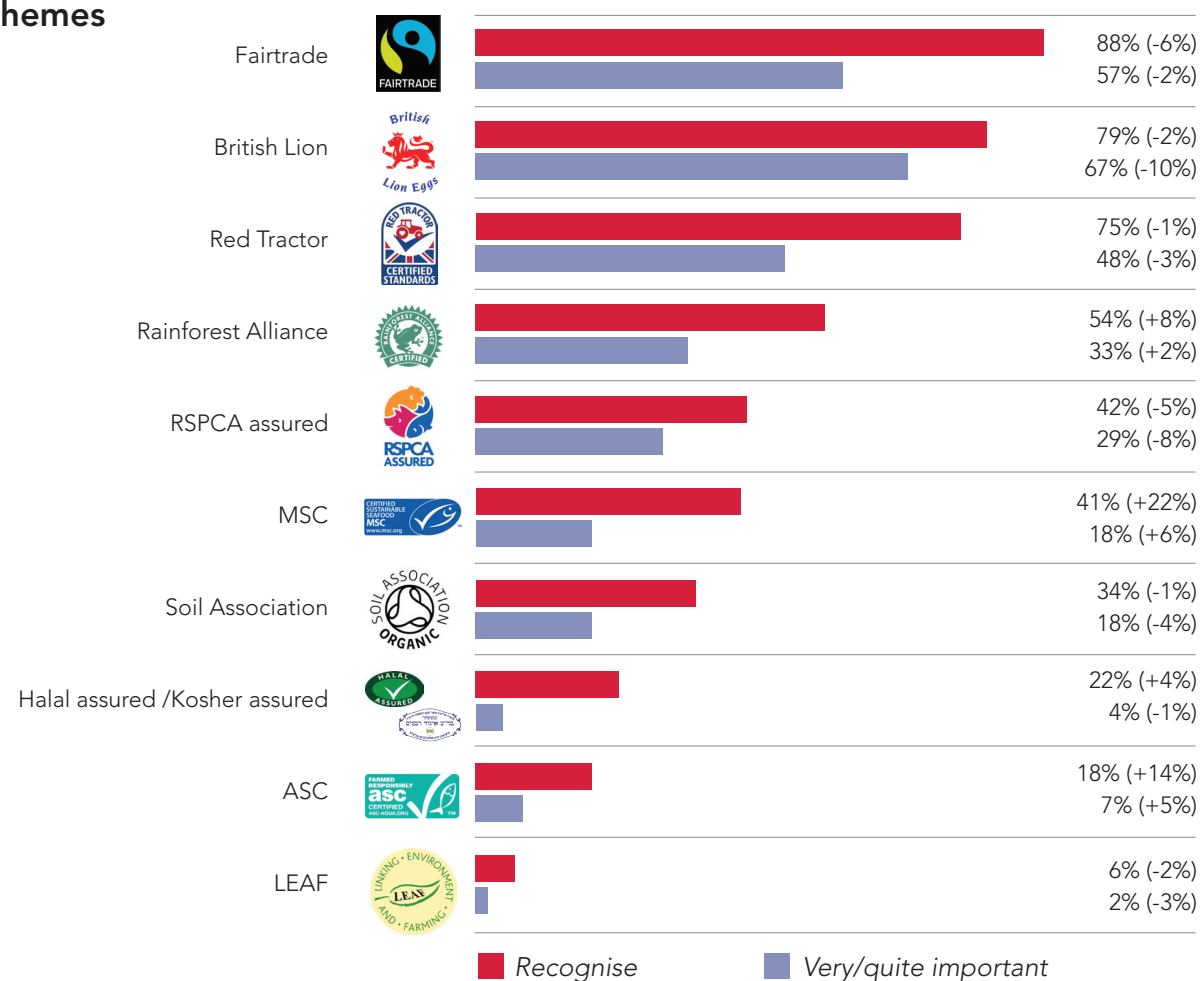
Established to give consumers more confidence, specifically in the light of food scares in the 1990's, these labels are a kite mark that take the complexity out of shopping.



Increased recognition of assurance schemes (continued)

Trust and recognition in food and assurance schemes

Which of the following logos do you recognise and how important is each one to what food you buy?



Food and assurance schemes are well recognised, with the top three – Fair Trade, British Lion and Red Tractor – having a clear impact on buying choices.

When people have limited funds to spend and are already making difficult choices about their weekly shop, being able to shop with confidence, no matter what budget or with which retailer, is critical to protecting trust in UK food.



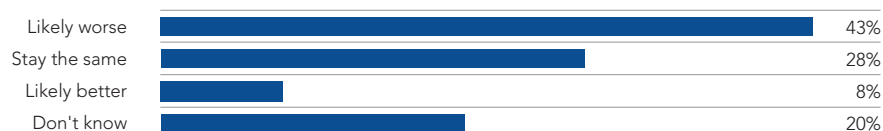
CONSUMERS ARE CONCERNED ABOUT TRADE DEALS

- **43 per cent** of people think that new trade deals will **change the standards of food in the UK**
- **Ireland** remains the most trusted country to import food from
- Trust in food from the **USA remains low**

Consumers fear the impact of trade deals on UK food

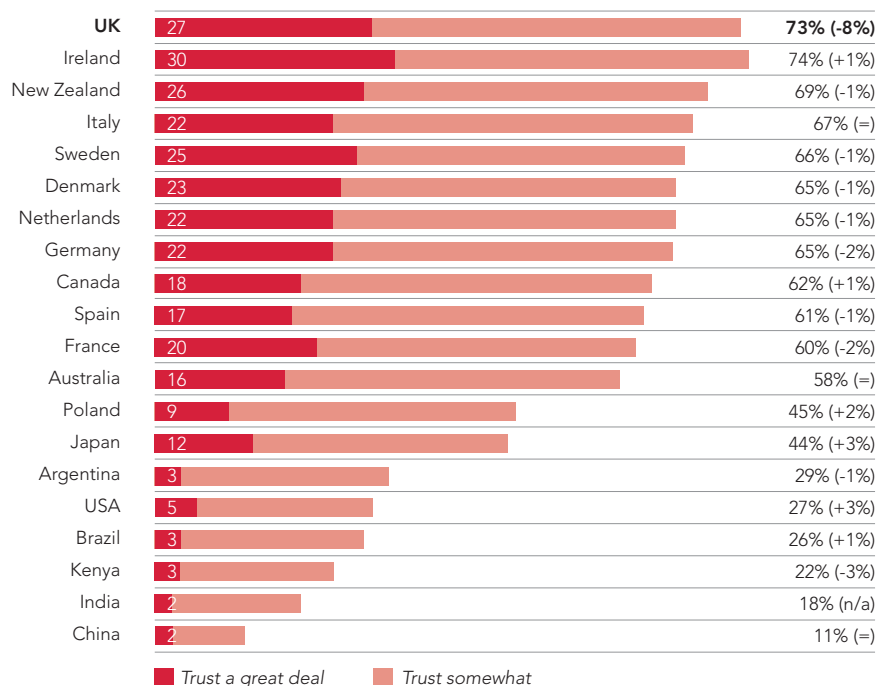
Impact of trade deals on food standards

Do you think new trade deals will change the quality of UK food? (New question for 2022)



Trust in food originating from other countries

To what extent do you trust food from other countries?



43 per cent of people fear that new trade deals will reduce the standards of food in the UK and drive down standards.

The U.S. and India – both countries the government is seeking trade deals with – have very low levels of trust in their food. Just 29 per cent and 18 per cent of consumers trust food that originates in those countries respectively.

At the other end of the spectrum, Ireland and New Zealand are the most trusted countries for imported food among survey respondents, followed by many European and Nordic countries, such as Italy, Sweden, Denmark, Netherlands, and Germany. The Index found that 58 per cent of consumers look at the country of origin before buying a product.

Outside of the UK, our closest neighbour, Ireland, remains top of the list for beef, chicken, pork, and dairy products.

New Zealand bucks this trend on one single product – lamb – due to its reputation for producing a high-quality product.

The U.S. fares very poorly on imported food, there is also very little appetite for produce from India, where we have not previously seen a vast number of food imports.

Closest to home equals comfort

Trust in meat and dairy from different countries

Not including the UK, which countries would you like the UK to import the following food and drinks from?

	Beef	Chicken	Pork	Lamb	Dairy
Ireland	50% (-2%)	41% (-1%)	41% (-1%)	42% (-2%)	50% (-1%)
New Zealand	22% (=)	17% (=)	17% (-1%)	48% (-2%)	23% (=)
Netherlands	25% (-1%)	26% (=)	27% (-1%)	23% (-1%)	40% (=)
Italy	24% (-1%)	23% (-1%)	24% (-1%)	21% (=)	37% (-2%)
Sweden	24% (-1%)	25% (-1%)	25% (-1%)	23% (=)	38% (-1%)
Germany	29% (+1%)	27% (-1%)	31% (-1%)	24% (=)	34% (=)
Denmark	24% (=)	24% (-1%)	35% (-2%)	23% (=)	37% (+1%)
Spain	22% (+1%)	23% (+1%)	24% (=)	20% (=)	27% (=)
France	25% (=)	26% (=)	24% (-1%)	24% (=)	42% (=)
Canada	23% (=)	18% (=)	18% (-1%)	18% (=)	24% (+2%)
Australia	23% (-1%)	16% (=)	16% (-1%)	28% (=)	18% (=)
Poland	18% (-3%)	18% (+2%)	21% (+1%)	16% (=)	23% (+1%)
Japan	15% (-1%)	11% (=)	10% (=)	9% (=)	10% (-1%)
USA	13% (+3%)	8% (=)	8% (-2%)	7% (=)	10% (=)
Argentina	29% (+1%)	6% (+1%)	7% (-1%)	8% (-1%)	7% (-1%)
Brazil	17% +2%	6% (+1%)	6% (=)	6% (-1%)	7% (=)
Kenya	5% (=)	5% (=)	4% (-1%)	4% (-1%)	5% (=)
India	2% (n/a)	2% (n/a)	2% (n/a)	2% (n/a)	2% (n/a)
China	3% (=)	4% (=)	3% (-1%)	3% (=)	3% (=)

Key

■ Most trusted
 ■ Second most trusted
 ■ Third most trusted



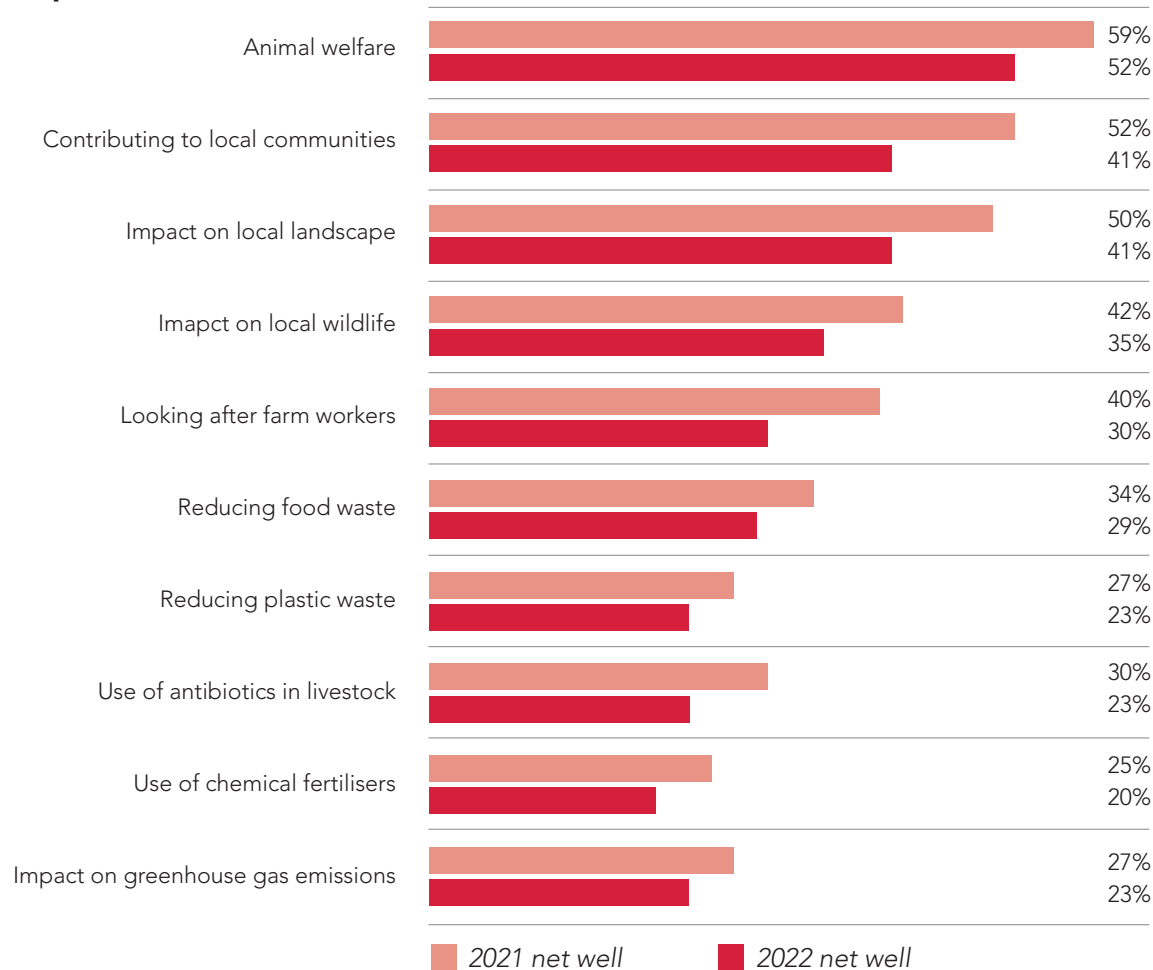
CHALLENGES FOR FARMERS

- **Trust in farmers remains high** but is declining
- **Animal welfare** is a key influence in shopping decisions
- **Sustainability still matters** to consumers, even as budgets are squeezed

Farmers remain well trusted but there are challenges around performance

The perception of farmer performance

How well do UK farmers perform?



Overall, trust in the role of farmers in the food system remains high (77 per cent), but it has declined over the past nine months on every single metric that consumers were asked about.

Just over half of people (52 per cent) think that farmers are performing well on animal welfare, compared to 59 per cent last year.

Consumers also perceive that the impact farmers have on the local landscape and wildlife has worsened and that they are not performing well on issues around food and plastic waste.

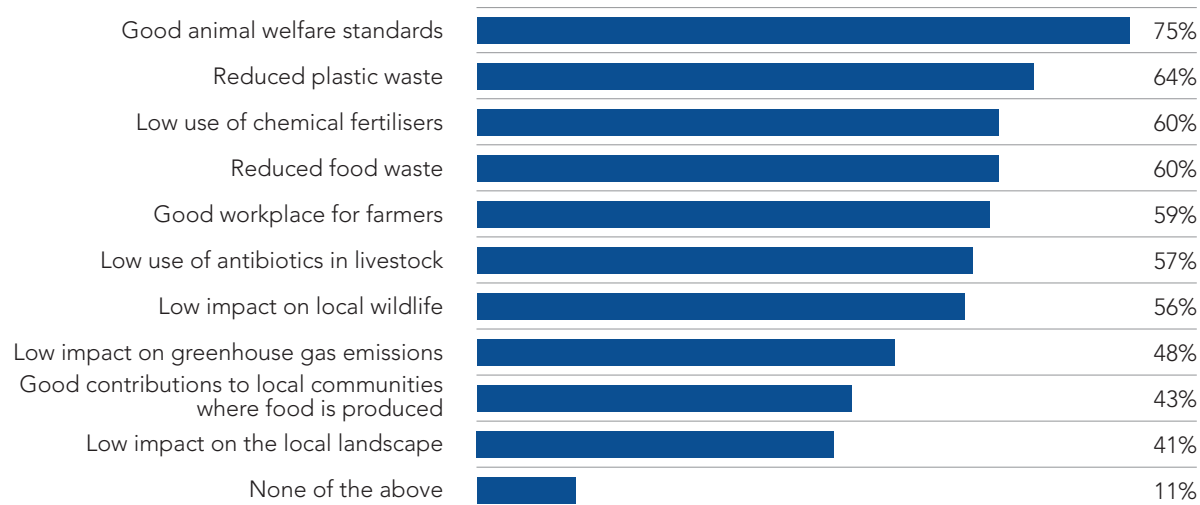
This data suggests a lack of awareness about the measures in place across British farming to ensure standards through inspection and assurance schemes, which covers these areas of production and ensures compliance.

"Most farmers are responsible people dedicated to producing good food."

Consumers care about animal welfare and reducing the environmental impact of food

What consumers value in food production

What do you value in food production?
(New question 2022)



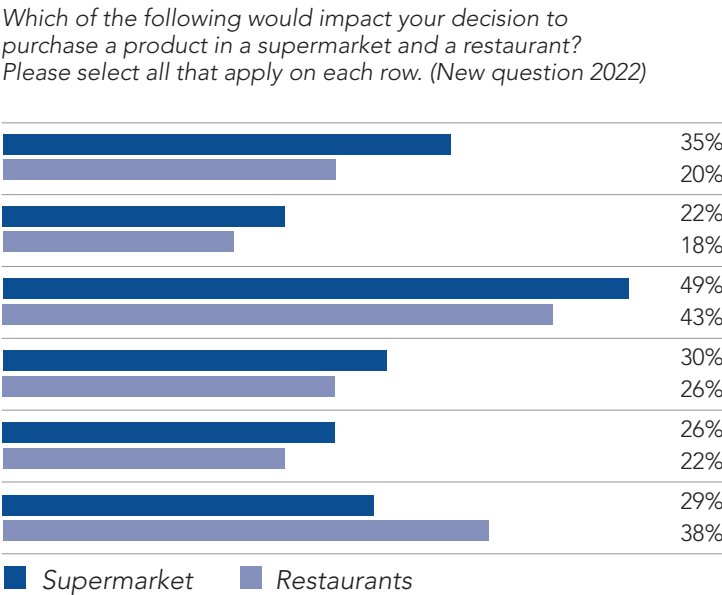
75 per cent of people value good animal welfare standards in the production of the food they buy. However, while shoppers do look to good standards, the specific standards applied to British produce is not necessarily understood by consumers beyond the most recognisable labels such as Free Range and Organic.

Sustainability is also another important factor for consumers when thinking about trust in food. 64 per cent of people value a reduction in plastic waste in their food production and sale, whilst 60 per cent of people value low use of fertilisers, and just under half value a low impact on greenhouse gas emissions.



Consumers pay close attention to packaging information

Impacts on purchasing decisions

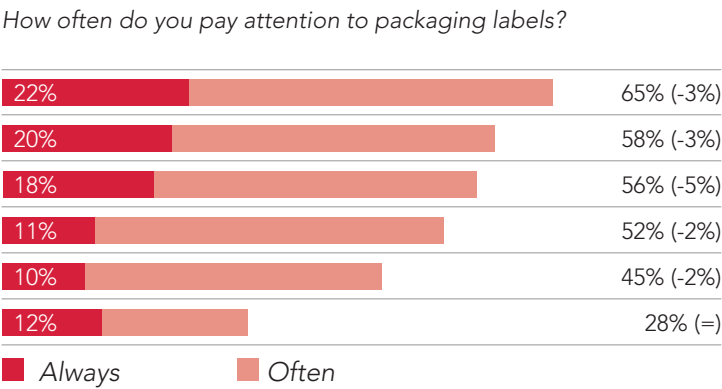


Consumers pay close attention to certain information on packaging. 58 per cent of consumers look at the country of origin while 35 per cent of consumers said having the name of the farm on the label would have an impact.

52 per cent of customers consider the range it comes from (such as Tesco Finest or Sainsbury's Taste the Difference), and nearly half of consumers often or always look for a food assurance logo.

Labelling a product as sustainably farmed also has a big influence, with half of shoppers saying it would have a positive impact on their decision to purchase. 30 per cent said something being labelled organic would make a difference to their decisions as well.

Importance of packaging information



HOW DO WE TACKLE DECLINING TRUST?

It's vital that the entire food industry, from farmers to the hospitality sector, works together with the government to reassure consumers that standards of food are not being sacrificed. This is especially important at a time when consumers feel they are having to buy food produced to a lower standard as a result of inflation, or fear that the standard of food available will reduce due to new trade deals and the impact of Brexit.

It is imperative that assurance schemes, retailers, food manufacturers, and producers and farmers all work together with the government to reassure shoppers that whatever their price range, they can be confident in the standards and safety of food that is produced in the UK. Affordable British food does not mean lower sourcing and production standards.

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 per cent 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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