

Food Provenance



You Gov **SixthSense**

MarketingWeek



Introduction

Within the food market “provenance” has come under scrutiny as consumer demand for locally, regionally and nationally produced food has grown. During the recession the issue of food miles is less under the spotlight than the opportunity to support local and national economies.

The UK’s major food retailers have all developed policies to maximise domestic sourcing of food in response to perceived customer demand, although there are also likely to be some cost benefits involved.

However, awareness levels among consumers about the origin of their purchases vary and there is considerable scope for further education.

Methodology

For this report, YouGov SixthSense commissioned a survey among its online panel, drawing on a nationally representative sample of 2,110 UK adults aged 16+.

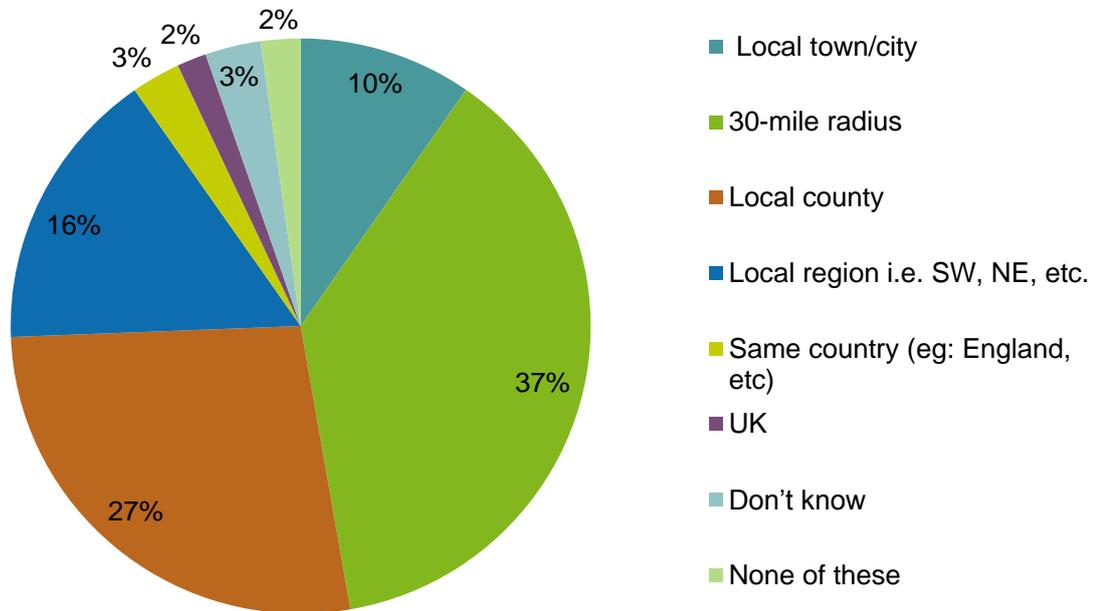
Field work was conducted 11-19 June 2012.



The Meaning of local

Interpretation of where locally produced or locally sourced food originates

Base: 2,110 nationally representative UK adults aged 16+



Source: YouGov SixthSense Food Provenance Survey (11-19 June 2012)

- For the majority of UK adults locally sourced implies products originating within their local town or county or a 30-mile radius.
- The body for Farmers' Market Certification defines local as 'ideally' being from within a 30-mile radius of the market with 50 miles acceptable for larger cities. County or natural borders are also acceptable limits.

Wider interpretation

- Around one in six accept locally produced to relate to a wider area encompassing their region, for example the South West, which would incorporate a number of counties including Dorset, Wiltshire, Cornwall, Devon and Somerset.
- An even smaller proportion of consumers are willing to extend this further on a national basis.



Attitudes towards local sourcing

Attitudes towards locally sourced foods, by social grade

Base: 2,110 nationally representative UK adults aged 16+

	All	ABC1	C2DE
It supports the local economy	79%	82%	77%
Better quality as it has not 'travelled' as far	50%	54%	44%
If I see that a restaurant or pub has locally sourced food on its menu, I am more likely to eat there	31%	36%	26%
Locally sourced food on a menu influences my meal choices	27%	31%	23%
More expensive than other brands and products	26%	25%	27%
Only relevant to those living in the country or more rural areas	6%	5%	7%
Cheaper than other brands and products	4%	3%	5%
None of these	7%	5%	8%

Source: YouGov SixthSense Food Provenance Survey (11-19 June 2012)

- Locally sourced foods are most positively perceived by women and ABC1 consumers.
- Overall four in five adults agree that local sourcing supports the local economy with agreement rising among older consumers.
- There is a similar pattern in appreciation that the food is better quality as it has not 'travelled'.

A positive influence

- Those from better-off households are more likely to be positively influenced by the availability of locally sourced foods when eating out, as are the over-55s.
- Although generally this influence tends to increase in tandem with age, peaking among the over-55s.

More expensive locally

- While just over a quarter of respondents believe local sourcing means higher prices, only one in 20 think it means lower, implying that the majority anticipate some type of parity with comparable products.
- The under-25s take the lead in regarding locally sourced foods as a more expensive option.
- They are also most likely to view local sourcing as being a rural issue.



Food Categories and Provenance

Significance of food provenance, by category

Base: 2,110 nationally representative UK adults aged 16+

	Very important	Important	Neither	Unimportant	Very unimportant	Don't know
Poultry	22%	36%	25%	9%	3%	6%
Red meat	20%	36%	24%	9%	2%	8%
Eggs	19%	37%	29%	9%	3%	3%
Soft fruit	14%	39%	33%	10%	3%	2%
Vegetables	14%	38%	34%	10%	3%	2%
Fish	15%	33%	30%	10%	3%	8%
Milk	14%	35%	34%	11%	3%	3%
Cheese	12%	35%	35%	11%	3%	3%
Potatoes	12%	35%	38%	11%	3%	2%
Other fruit	9%	34%	41%	11%	3%	2%
Butter	10%	31%	39%	12%	3%	4%
Bakery	10%	30%	41%	13%	3%	3%
Shellfish	12%	25%	31%	10%	4%	18%
Jams	6%	21%	48%	15%	5%	5%
Bottled water	6%	20%	39%	14%	7%	14%
Rapeseed oil	6%	16%	44%	16%	5%	14%

Source: YouGov SixthSense Food Provenance Survey (11-19 June 2012)

- In terms of provenance the categories most likely to come under scrutiny are poultry, red meat and eggs, with well over half of consumers regarding origin as important or very important for these foods.
- A lesser priority is given to fish and shellfish among the other major protein foods.
- In the produce sector, the provenance of soft fruit is given the highest importance. This may be due to a greater awareness of the UK seasons for strawberries and raspberries.
- Four to five in ten are interested in the origin of dairy produce. For some of these products source may be more apparent through labelling and brands than in other foods.



Contact Us

To find out more about this report, or to purchase the full report please call +44 (0)20 7012 6063 or email sixthsense@yougov.com.

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Through our proprietary panel of over 350,000 UK consumers and bespoke research methodology, we collect unique consumer insight.

Our analysts are highly qualified and, on average, each draws on over 15 years industry experience to deliver analysis, comment, opinion and advice on the latest market trends and conditions across a range of sectors including Food & Drink, Retail, Health & Beauty, Lifestyle, Finance and Technology.

YouGov has been acclaimed as the country's most accurate pollster and the most quoted research company in the UK and has operations in the US, Europe and the Middle East.

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*PwC assured figures, 2012.

