CONSUMER INSIGHTS

January 2021

AHDB

TRUST IN FARMING AND THE ENVIRONMENT: THE CONSUMER PERSPECTIVE

Introduction: 2020, a year of flux

Agriculture is central to both global challenges and solutions related to human health and nutrition, economic wellbeing, and the environment. It is crucial that consumers feel they can trust in what is one of the most fundamental human needs – the food we eat, and how that food is produced. As Britain leaves the European Union, many certainties for consumers regarding food production, once taken for granted, are now being challenged and the need for new trade deals has the potential to compromise food standards.

2020 has been a difficult year for everyone, both in the UK and overseas. Repeated lockdowns and restrictions on businesses, as well as coronavirus itself, have caused panic buying, cupboard filling, widespread foodservice closures and difficulty with labour on farm and in processing units. The strain placed on both food supply chains and consumers has been unprecedented in peacetime.

Last year, in our research we found a landscape where trust in the food system was generally present, with concerns in some areas. The key concerns of the day were Brexit and the emerging issues of plastic pollution. Although issues such as animal welfare and the environment were growing in salience, the majority of consumers were positive towards agriculture, and farmers were by far the most trusted part of the supply chain. In 2019, the biggest perceived future disruption to farming was the potential shift towards plant-based meals.

Twelve months on, the entire current-affairs landscape has lurched into a completely different place – issues that had never been heard of before have now become the overriding force governing the daily lives of consumers.

Many have also highlighted that to focus so heavily on coronavirus, while putting aside the prospect of climate change, deprioritises a future threat that could become far more influential to our way of life, and economy, in a much less transient way. President-Elect Biden has already pledged to rejoin the Paris Agreement once in office, which promises to push the environment to even greater prominence on the global agenda. With the UK hosting the next major UN climate change summit, known as COP26, in Glasgow in November 2021, and the prospect of several effective coronavirus vaccines, the environment will rapidly return to being one of the top issues.

KEY FINDINGS

- **2020 has deepened consumer trust in the food supply chain – retailers and foodservice operators have been the key beneficiaries**
- **Farmers continue to command the deepest trust, driven by expertise and demonstrating shared values around caring for animals and the planet**
- **Coronavirus, and associated economic damage, has displaced Brexit as the top consumer concern, but environmental factors continue to deepen**
- **Consumers are more concerned about global environmental farming issues, like climate change and deforestation, than local issues**
- **UK farming is seen as environmentally beneficial and consumers support net zero initiatives**
- **Plastic packaging remains a key concern, and recycling is the most common way for consumers to mitigate their own impact**
- **Key ways for farmers to demonstrate environmental stewardship are tree planting, labelling and boosting efficiency**

Amid that backdrop, and with the UK now having left the European Union, how have attitudes towards agriculture and the food system shifted? What role does the environment play? And how can farmers and their customers demonstrate agriculture's continued role at the heart of the nation's wellbeing and as stewards of the land. AHDB asked a range of questions:

- How do British people feel about where their food comes from?
- To what extent do they trust the food system?
- How can our industry deepen that trust in the future?
- Is the environment a reputational risk for farming?
- What role do consumers believe British agriculture should play in safeguarding the environment?

Research background

AHDB conducted a study with Blue Marble, an independent consumer research organisation, interviewing 1,500 consumers about their opinions and attitudes towards food and farming. Fieldwork was conducted in autumn 2019 and again in autumn 2020.

This report discusses the issues of trust and transparency in the agri-food system and is aimed at influencers and policymakers in agriculture – organisations such as the farming unions, government, industry bodies and the trade press. The report also includes wider data sources to add further context to how these issues link into consumers' shopping behaviour. For example, it is worth remembering that price, quality and convenience are the key drivers of food choice for many consumers. How trust, transparency and traceability integrate will be increasingly critical.

The report explores how attitudes towards the food system have evolved over time, which elements of the food system are most trusted, how demonstrating shared values can boost trust, as well as potential barriers to trust in the future.

It examines consumer attitudes to farming and the environment and concludes by looking at mechanisms the industry can use to reassure consumers they are taking their environmental responsibilities seriously.

HAVE CONSUMERS' VIEWS OF THE FOOD SUPPLY CHAIN CHANGED IN 2020?

Agriculture

Despite what at times feels like an onslaught of negativity in the press, overall, consumer perceptions of farming in the UK are positive: 66% feel very or somewhat positive about British agriculture. This is up from 62% last year, with 4% more people feeling very positive. The biggest improvements have come for the horticulture and potato sectors, which already had the most favourable impressions. As we saw last year, farming sectors involving animals, particularly meat, and those that tend towards more intensive systems, such as pork and poultry, attracted a little more negativity. However, even within these sectors, the degree of overt negativity was very low, at 9% and 13% respectively.

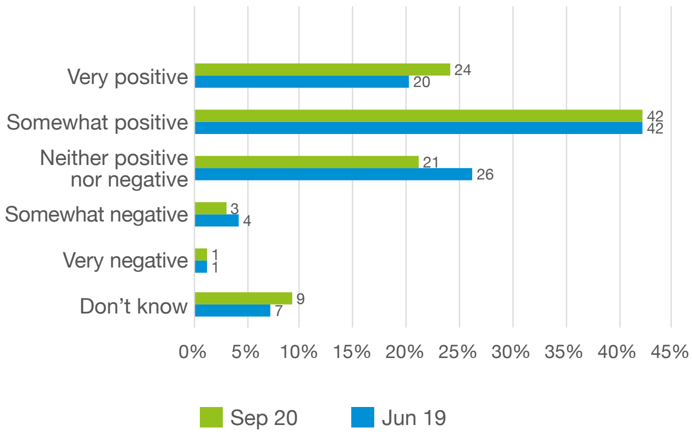


Figure 1. Impressions of British agriculture (%)

Source: AHDB/Blue Marble 2020

(Q – Please indicate your overall impression of British agriculture today… Base: All respondents (1,500))

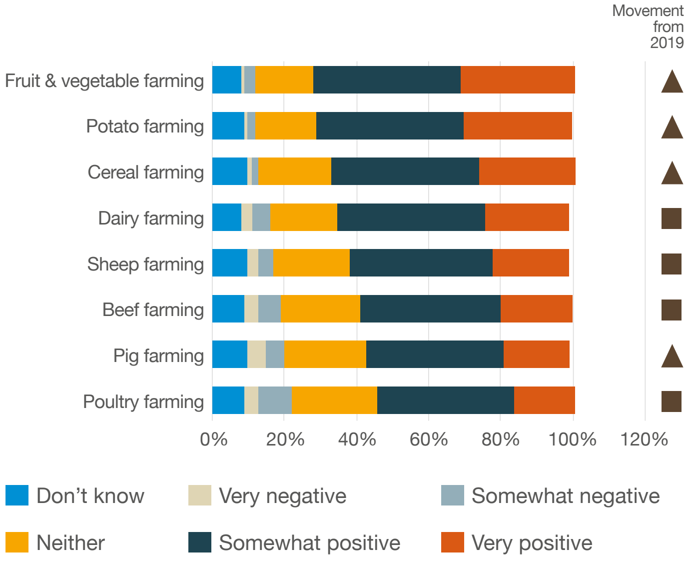


Figure 2. Impressions of UK farming sectors 2020

Source: AHDB/Blue Marble 2020

(Q – Please indicate your overall impression of the following… Base: All respondents (1,500))

A decrease in negative media

Throughout the past few years, negative stories in the media about food production, including issues around animal welfare, the environment and threats to health due to issues like antibiotic usage and pesticide use, have grown in scale. In the middle of 2019, awareness of red meat in the media peaked at 37%, driven by stories ranging from health and animal welfare to the environment (Source: AHDB/YouGov). Moreover, the overall tone was overwhelmingly negative (60% negative vs 19% positive in February 2020). However, moving through 2020, the dominance of coronavirus in the news suppressed negative coverage of red meat – for example, only 19% |of consumers reported hearing stories this year.

Negative news can have a major impact on consumers' buying behaviours, with recent research by Kantar for AHDB showing those exposed to negativity were 18%pts more likely to reduce their meat consumption compared with those who had not been exposed (Source: Kantar Meat Reducers). This drop-off in negative media is likely to be a positive contributor to deepening trust in agriculture.

As well as some good news stories

The increased positivity towards agriculture is supported by recent research conducted by AHDB/YouGov which showed 75% of consumers felt British farmers were doing a good job in keeping the nation fed during the pandemic.

Farmers had an opportunity here to demonstrate how they were supporting the nation at a difficult time. Agriculture relies on its workforce and the pandemic raised many logistical challenges that needed to be overcome, which has been recognised by consumers.

Industry campaigns, such as 'Milk Your Moments', may have also helped here. For the first time in many years, the campaign advertised milk on TV, in partnership with MIND to support mental health charities and encourage consumers to stay in touch with friends and neighbours virtually during lockdown.

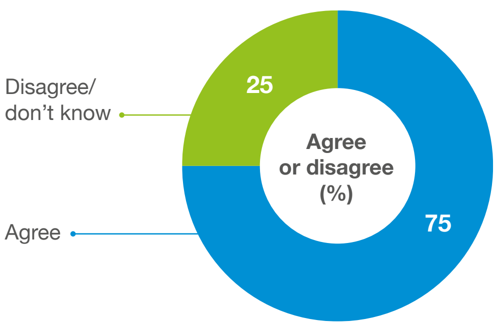


Figure 3. British farmers are doing a good job in producing food for consumers during the coronavirus pandemic

Source: AHDB/YouGov, Aug 2020

(Q – To what extent do you agree or disagree that…)

Further to this, some features of the pandemic have resulted in a trend for consumers to buy more locally. We see this in the growth of channels like milkmen and butcher's shops throughout 2020. Part of this is a drive towards convenience and trying to avoid the crowds attracted by the major supermarkets, but many consumers also report a desire to support local businesses. Indeed, we have seen a significant increase in the belief that buying red meat helps to support local farmers (AHDB/YouGov).

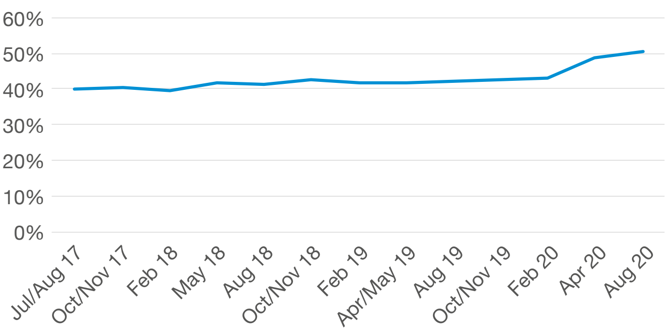


Figure 4. Agreement that purchasing red meat helps to support local farmers

Source: AHDB/YouGov, Aug 2020

(Q – Thinking now about different types of meat or fish, which of these would you say…? – … purchasing them helps to support local farmers – red meat)

> I feel that particularly during these times of uncertainty – Brexit and COVID-19 – it is especially important to support our UK producers

Female, 42, Living alone, North West

Source: IGD Shoppers of Our Time

Direct-to-consumer channels, such as farm shops and meat- and veg-box schemes or milk-vending machines on farm, have reported growth. Resultant shorter supply chains could be good news, both in terms of adding value and margin to some agricultural produce and helping build a closer relationship between consumers and the food they eat.

In the future, there could be pressure placed on this trend as recessionary behaviours deepen along with economic pressures. The last recession saw channels like discounters winning over bigger supermarkets as consumers looked to manage their budgets.

How has trust in the wider supply chain developed in 2020?

One of the key findings of 2019's research was that farmers were by far the most trusted group in the supply chain, driven by a sense of shared values. Consumers valued farmers for showing expertise, as well as care for both animals and the environment. This year, with the challenges brought by the pandemic, farmers have remained the most trusted group, but other parts of the supply chain have also proved their worth to consumers.

Supermarkets saw a boost of consumer trust by 10%pts and food service by 12%pts. The main improvements here have been in demonstrating care about people, delivering on their promises and communicating with consumers. This shows there are gains to be made in even the most challenging of times. If an industry can show how they are changing and adapting to evolving consumer needs, and make their lives easier, there is opportunity.

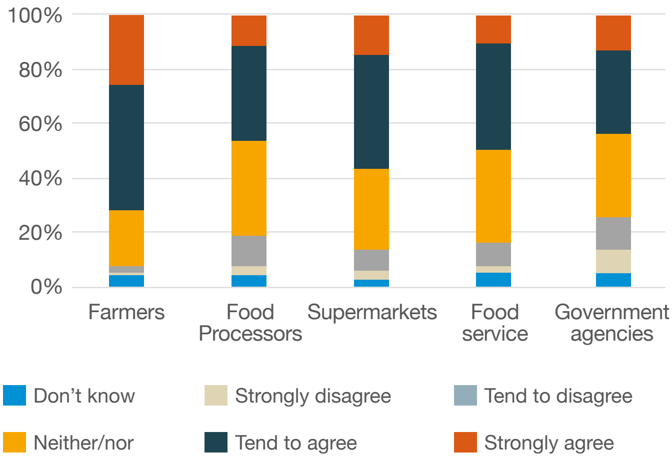


Figure 5. Trustworthy

Source: AHDB/Blue Marble 2020

(Q – Thinking about all elements of the food system, how much would you agree or disagree with the following statements about each group on a scale of 1–5, where 1 is strongly disagree and 5 is strongly agree? A trustworthy group). Base: all respondents 1,500

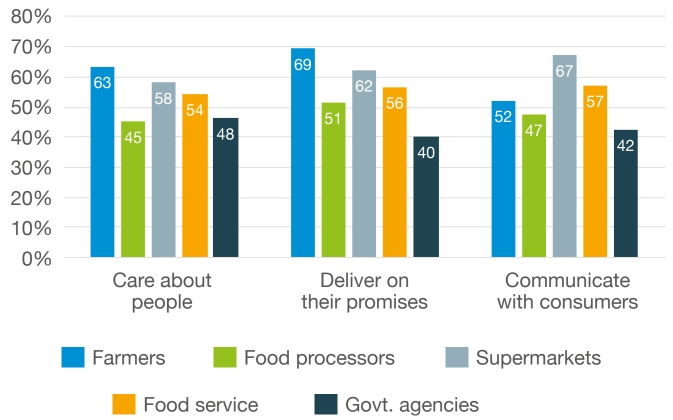


Figure 6. Perceptions of groups in the supply chain

Source: AHDB/Blue Marble, 2020

(Q – Thinking about all elements of the food system, how much would you agree or disagree with the following statements about each group on a scale of 1–5, where 1 is strongly disagree and 5 is strongly agree? Base: All respondents (1,500))

WHAT ARE THE BIG ISSUES FOR CONSUMERS THIS YEAR?

Unsurprisingly, coronavirus has been the biggest issue of concern for consumers in 2020, as shown in Figure 7. As much as the health implications of the disease itself, it has brought with it a crippling impact on the economy and widespread fear of unemployment. Coronavirus's dominance of media coverage has also displaced that of Brexit to some extent, which has dropped from a top-tier issue of concern for consumers to middle-ranking.

But beyond coronavirus and the economy, the environment is of high concern to consumers. Pollution from plastic waste and climate change are both in the top tier of issues.

Other factors also relating to the food system, including the humane treatment of farm animals, food waste and the safety of food imports from outside the UK, occupy a secondary tier of concern and are unmoved year-on-year.

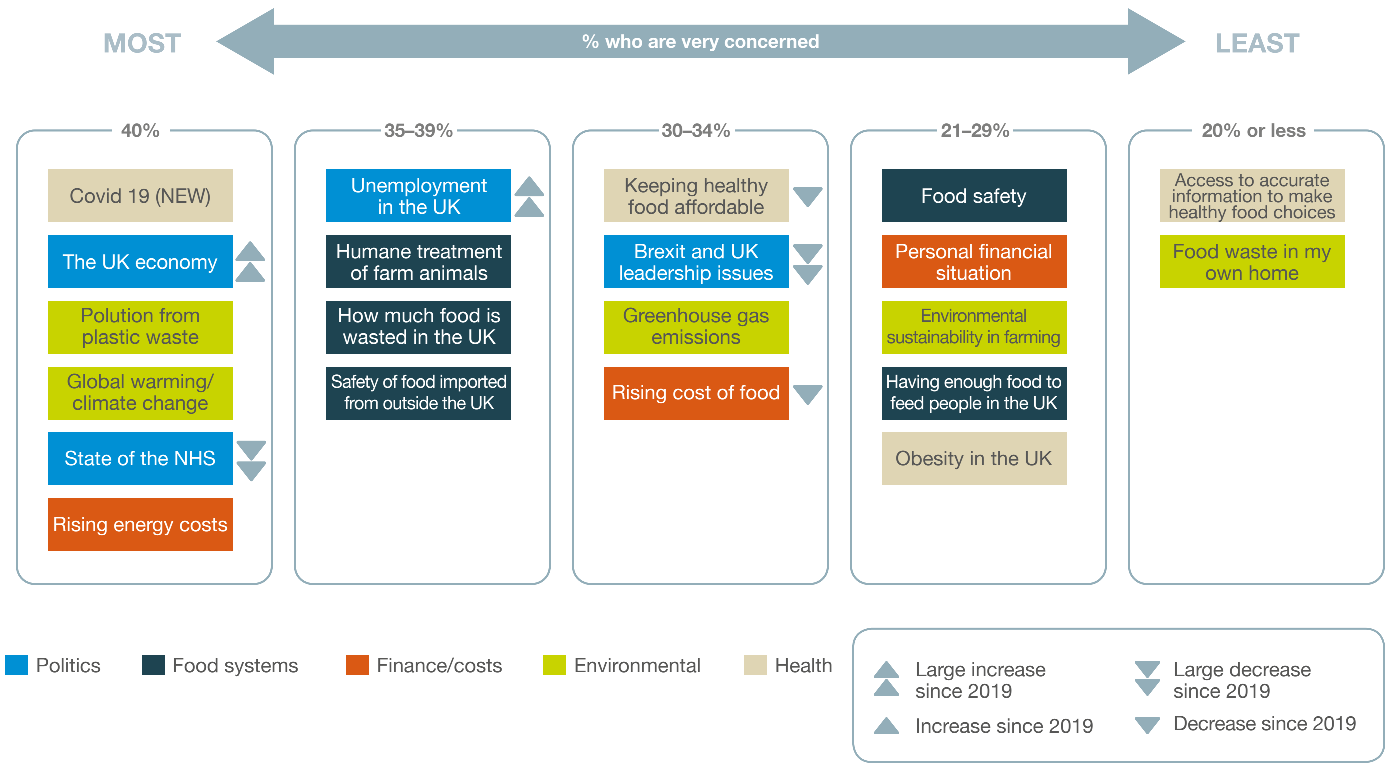


Figure 7. Key consumer concerns

Source: AHDB/Blue Marble, 2020

(Q – How concerned are you about...? Base: All respondents W2 (1,578))

FOCUS ON THE ENVIRONMENT AND FARMING

Other research conducted by AHDB has highlighted how influential the environment is becoming as a driver of food choice. Around two-thirds of consumers consider the environmental impact of the food they eat at least some of the time (AHDB/YouGov). In recent years, concern for the environment has also been a key driver of red meat and dairy reduction and for people adopting exclusionary diets, such as veganism and vegetarianism.

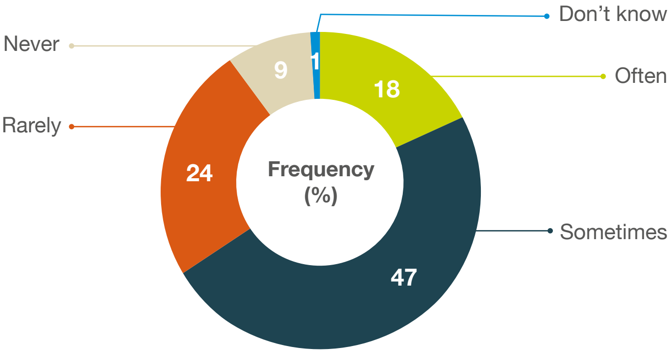


Figure 8. Frequency of considering the environmental impact of food eaten

Source: AHDB/YouGov, August 2020

(Q – Do you ever consider the environmental impact of the food that you eat?)

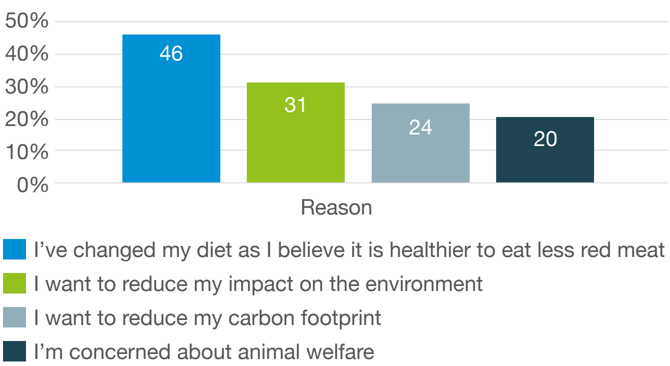


Figure 9. Top reasons for eating less red meat

Source: AHDB/YouGov, August 2020

(Q – Which, if any, of the following are reasons why your consumption of red meat has changed over the last month? Base: Meat reducers)

A complex picture

Some newspapers and non-governmental reports, such as EAT-Lancet, have drawn links between dietary choices and environmental consequences, often to the detriment of red meat and dairy.

While there are environmental consequences of all foods that consumers choose to eat, it is not a simple matter to assess impact based on plant or animal origin. All food production has a specific profile in terms of carbon footprint, water usage, inputs such as fertilisers/pesticides, benefits or detriments to biodiversity, soil health, ability to sequester carbon, and so on. In addition, country of origin plays a key role in both food miles but also in how uniquely suitable food production is in that region or area. For example, a litre of milk produced in an area with abundant natural rainfall, where grass grows extremely well, requires minimal inputs such as water or pesticides. Contrast that to a litre of almond milk-substitute produced in drought-prone California and shipped around the world, and the issues become clear. A litre of almond milk takes 371 litres of water to produce, while cow's milk is in excess of that in total. In the UK, this water is predominantly rainfall, while the almond milk is predominantly irrigation. (Source: Dairy UK)

The NFU recognises that the agricultural sector as a whole has a key role to play in helping the UK meet its climate commitments and has pledged to reach net zero in terms of carbon emissions by 2040. Minette Batters, NFU President, highlights the unique opportunities that farming has in terms of both its ability to be more efficient, but also to provide solutions by way of acting as a carbon sink.

She says, "It's absolutely remarkable… No other industry can even say that it can do that within its full structure, and we can. The exciting thing about climate change and delivering on net zero is that it all leads to building a better business. These are not compromises. This is about building a better, climate-smart business. I think that's very exciting."

(Source: https://www.businessgreen.com/interview/4014493/farming-change-nfu-president-minette-batters-net-zero-changing-diets-brexit)

The NFU's position is very clear that UK agriculture can meet its commitments without reducing production of meat and dairy, and that even if diets evolve in the UK, there will be scope to export excess production.

The UK's Committee for Climate Change maintains, however, that for the UK to meet its climate commitments, consumption (and production) of beef, lamb and dairy would need to reduce by a fifth by 2050.

As the debate continues, we wanted to better understand consumers' views towards the issue. Do consumers prioritise twice-yearly air travel over food production? How informed are consumers about issues relating to farming and the environment? And what environmental initiatives would they like to see prioritised in the food supply chain?

Understanding consumer priorities can help to shape policy and influence decision-makers, as well as highlight where more communication could be needed.

The consumer perspective on farming

As discussed earlier, concerns for the climate and pollution are among the biggest issues of the day. But to what extent do consumers see farming as a problematic industry? The picture is quite nuanced and there is some understanding that there are global issues and local issues, and the situation in the UK can be quite different.

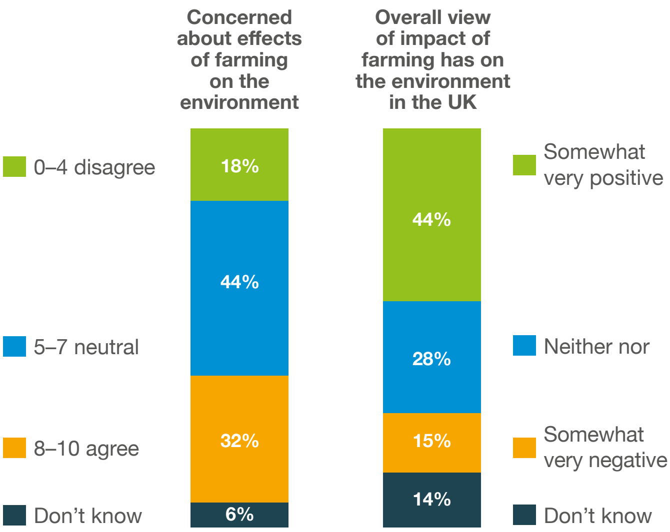


Figure 10. Opinions of the impact of farming globally vs locally

Source: AHDB/Blue Marble, 2020

(Q – Agreement with statement – I am concerned about the effects of farming on the environment? On balance, what is your view of the impact that farming has on the environment in the UK? Base: All respondents W2 (1,578))

A third of consumers are generally concerned about the effects of farming on the environment. Only 18% felt unconcerned, with the remainder being neutral, suggesting either a lack of specialist knowledge or reflecting the fact that the assessment is not simple for consumers.

However, in the UK, people feel much more positively about the impact of farming in this country, with 44% feeling positive and only 15% feeling negative. One of the reasons why British people generally trust farmers is because their stewardship of the land demonstrates they care for the environment.

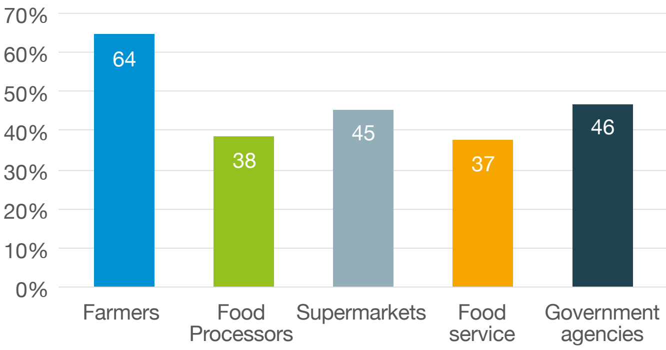


Figure 11. Cares about the planet

Source: AHDB/Blue Marble, 2020

(Q – Thinking about all elements of the food system, how much would you agree or disagree with the following statements) Base: All respondents (1,500))

Of all industries, farmers may have some of the most vested interest in issues around climate change: less predictable growing conditions and disruptions to global markets have an immediate effect on volatility, efficiency of production and ultimately profitability and resilience.

In the UK, the majority of people do not see farming as one of the most influential negative contributors to the environment. They rank heavy industry most highly, followed by air travel and waste disposal, then energy production. Farming is ranked almost last, on a par with car travel. There are exceptions to this and people who have adopted exclusionary diets, such as vegans and vegetarians, are twice as likely to put farming as their top concern (20% put farming top, compared with 10% of non-meat excluders).

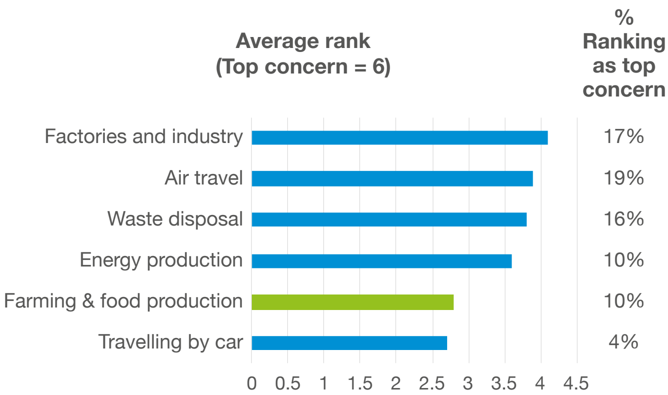


Figure 12. Concern about environmental impact – by sector

Source: AHDB/Blue Marble 2020

(Q – How concerned are you about the effects of each of these on the environment? Base: All respondents W2 (1,578))

Key concerns

On the surface, the biggest worries that people have relating to farming and the environment have a few things in common. They tend to be more global issues and they are more likely to be campaign-driven or based around documentaries (such as David Attenborough's *Blue Planet*) or just about things consumers have heard about in the media. The top concerns based on a simple ranking are plastics in food packaging, deforestation overseas (to raise cattle or to grow feed crops such as soya) and the impact of insecticides on insect health.

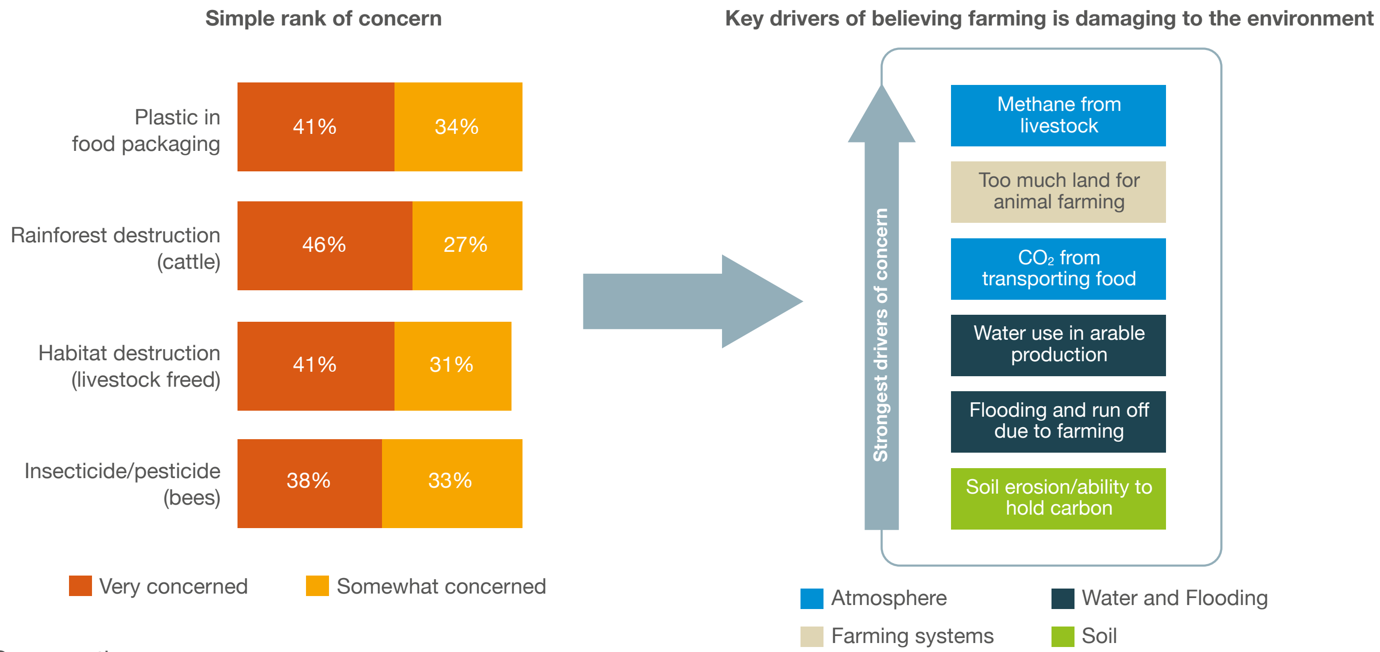
However, we have dug deeper and interrogated the data a little more. By looking at the relationship between people who have deeper concerns about the impact of farming on the environment and specific issues, we have been able to tease out what the key issues are for those who may be more informed. This leads us to a slightly different set of concerns than in a simple ranking (Figure 13).

The most compelling issues highlighted are more relevant to UK agriculture, are less transient/campaign-based, and more informed or nuanced. Looked at in this way, the data shows that the key drivers of worry for the more informed or concerned are: methane from livestock, the amount of land allocated to animal production, water use in arable, flooding and soil erosion.

Consumer actions

But to what extent do worries about the environment inspire personal action on the part of consumers? And what sorts of things do they do?

The majority of consumers are personally taking some actions to help the environment. Most common is recycling, with two-thirds recycling regularly. With the majority of councils offering roadside collection services for recycling, it is perhaps surprising that this is not higher, but a further 9% said they would consider it in future. Other more popular actions, which over half of consumers do currently, are trying to minimise water and energy use.



Common themes

- Top of mind
- Global
- General population
- Passive "I heard"
- Transient – campaign driven

- Ingrained
- Local
- Informed population
- Active "I know"
- Persistent/growing – "science driven"

Figure 13. Key farming issues and environmental issues for consumers

Source: AHDB/Blue Marble 2020

(Q – How concerned are you about each one? Base: All respondents W2 (1,578))

Plastic packaging has been an issue of late, with 44% of people saying they were trying to buy more of their food loose. However, coronavirus, which has driven a shift towards online shopping and a desire for increased hygiene, may have put the brakes on this trend. For example, in the potato sector, we have seen a reduction in volumes being sold loose, with strong growth in pre-packed product.

Buying local is another way in which people recognise they could help. When people buy locally, perhaps from a farm shop or butcher's, they are buying less pre-packaged formats and generally less plastic. However, there is little appetite to pay more for compostable packaging.

Travel is another issue recognised as problematic by consumers, with 37% saying they are travelling by air less and a further 15% prepared to do so in future. Again, coronavirus has forced the majority of us to severely restrain air travel in any case, so this may be due to necessity rather than choice. Car use is another form of transport that some are trying to cut back on.

Dietary change, in the form of eating less meat and dairy, comes lower down the rank order of actions that consumers would take to help the environment, although around one in three feel they are already eating less meat, and 17% less dairy.

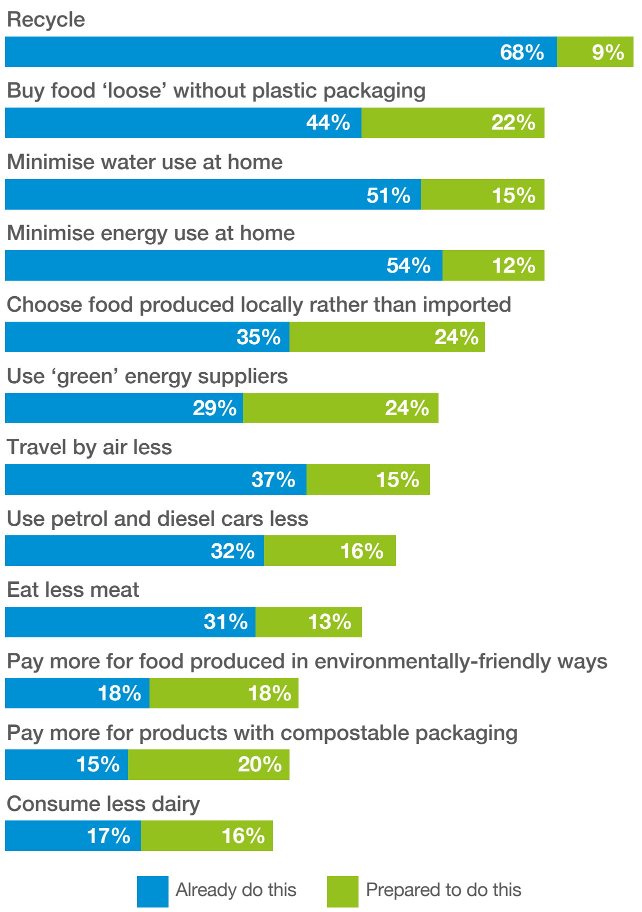


Figure 14. Consumer actions to help the environment

Source: AHDB/Blue Marble 2020

(Q – Which, if any, of these things do you already do to help the environment? And which, if any, of these would you be prepared to do to help the environment? Base: All respondents W2 (1,578))

Consumer-friendly sustainability initiatives

With the Government's ambition for the UK to reach net zero by 2050, every industry has to play its part in helping to drive environmental impacts, and farming is no exception. The new Agriculture Act is explicit in these ambitions. The bill sets out the new framework for agricultural subsidisation now that we have left the European Union. In England, farmers will be paid to produce 'public goods', such as environmental or animal welfare improvements.

New items have been added to the list of purposes in the previous bill that can be given financial support, notably soil protection and improvement. The new bill also requires Ministers to have regard to the need to encourage the production of food in England, in an environmentally sustainable way. That could include producing more efficiently with fewer inputs or supporting the ecology of the UK by providing habitats and improving soil health.

As a side note, prioritising either increased food production or environmental safeguarding can be seen as a policy choice. It is important to note that this is not an area where there is a clear consumer preference.

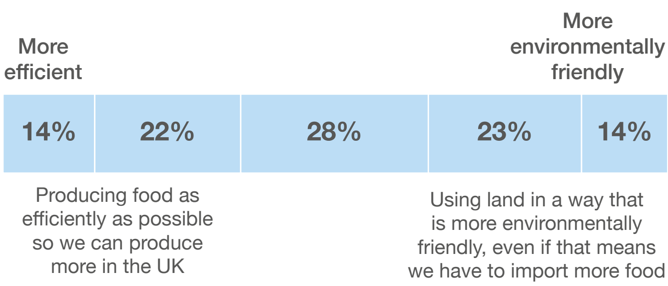


Figure 15. Preference for food production vs sustainability

Source: AHDB/Blue Marble 2020

(Q – Farmers are routinely subsidised by most governments to safeguard food production and keep food affordable. On balance, what would you prefer that farmers be subsidised for? Producing food as efficiently as possible so we can produce more in the UK or using land in a way that is more environmentally friendly, even if that means we have to import more food) Base: All respondents W2 (1,578)

With the 'public goods' policy objectives in mind, we wanted to understand how consumers might react to various possible environmental improvement schemes or initiatives, both in farming and the wider supply chain. We have looked at the data both among the general British population and among those who are particularly concerned about the impacts of farming on the environment.

There is generally quite a high level of interest around most possible initiatives, especially among those who were most concerned to begin with. This suggests there is an appetite for agriculture to tell more sustainability stories and that these would be welcomed by the public.

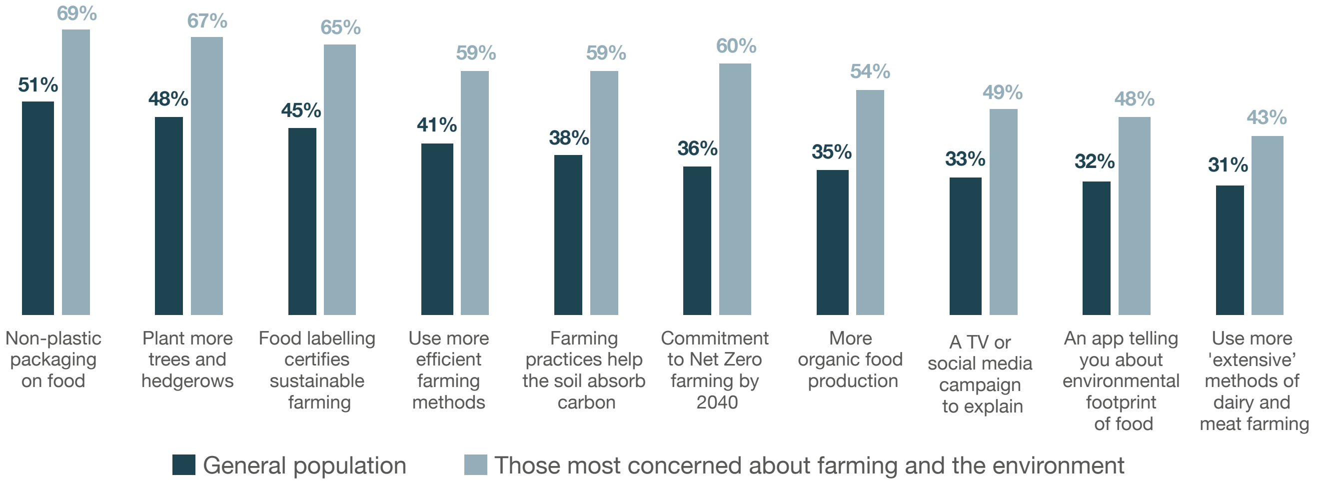


Figure 16. % very interested in initiatives that farmers could take to show they take protecting the environment seriously

Source: AHDB/Blue Marble, 2020

(Q – How interested are you in the following ideas by which farmers could show they take protecting the environment seriously?

1. Packaging

The top area of interest for consumers is in packaging. There is clear demand for more non-plastic packaging on food. However, it is important to note that plastic plays a vital role in food safety, extending shelf lives and managing the problem of food waste. Caution should be taken in seeking plastic reduction to ensure we do not exchange one environmental problem for another in the form of food waste. There are a number of new technologies being explored, including bioplastics, that may be of interest, if they can be produced economically. Most retailers and processors are already wrestling with this issue.

2. Trees and hedgerows

The second most interesting initiative was around planting more trees and hedgerows. In doing so, there are multiple benefits to the land, both in terms of carbon capture but also providing habitats for insects and wildlife, shelter for grazing animals, windbreaks for crops and managing flood risk and soil erosion. Some farmers in the UK are adopting silvopasture systems that integrate tree planting and foraging livestock, which may offer scope for adding value to the product in terms of selling a sustainability and quality story to niche consumers.

More mainstream opportunities in conventional systems would be in planting areas for shelter or increasing/planting hedgerows. Putting land aside to forestry could also be a bigger opportunity in future that could keep land in production, while meeting environmental goals. Aside from farming, there could be scope for retailers to partner with NGOs such as the Woodland Trust.

3. Sustainability labelling

Sustainability labelling also commands a high level of interest for consumers, with 45% being very interested in seeing this on pack. Previous research (Trust 2019) showed that food labelling is one of the key ways to boost consumers' trust in the food supply chain. Generally, if the choice is between something simple and something nuanced and complex, most consumers will choose simple.

Tempting as it is to follow that option, there are a number of considerations and issues that must be examined first:

- What does sustainable mean? Is it just about carbon and climate? Or biodiversity, soil health, water use? Which should carry the most weight?
- How does the labelling account for the value of the food in the diet? A food could be deemed highly sustainable, yet quite nutrient-poor – for example, a bag of sugar against a lean piece of beef?
- Packaging is already very crowded and difficult to navigate with multiple on-pack information and messages jostling with assurance schemes, nutrition information, system of production, logos, and so on
- What about foods, such as ready meals, or pre-packaged sandwiches, that include numerous different ingredients?
- How could we engender consistency between retailers?

Perhaps a better solution would be to make use of technology, such as QR codes that could enable those consumers who have the most interest to read more about it.

4. Net zero commitment

The majority of consumers don't rank the NFU's commitment for farming to reach net zero by 2040 among their highest initiatives of interest. This is probably due to lack of understanding about what the terminology of 'net zero' means – there may be scope to educate here with broader campaigns. However, among those who are most concerned about the impact of farming on the environment, this priority reaches the top four. Environmental groups have praised farming for making this commitment and it clearly carries some appeal for consumers as well.

5. Change in farming methods

Some of the more technical initiatives that could potentially make a huge difference to the impact of farming on the environment are less visible to consumers and therefore carry less weight. These include things like using more efficient farming methods, using methods that help soil sequestration of carbon and more organic production.

However, these are the types of actions that will aid in the move towards net zero and in becoming a broadly more sustainable and productive industry.

Despite the challenges that 2020 has brought, arguably agriculture has been one of the more resilient industries. With a monumental effort across all parts of the supply chain, farmers, growers and processors have pivoted their routes to market from foodservice to retail, have found entirely new routes to market where necessary, have curtailed production where needed, boosted production in other areas and adapted labour practices to become COVID-secure as much as possible. The industry has stimulated consumer demand for some products, helping to avoid food waste and keep the nation fed.

Happily, consumers have recognised the continued and significant efforts that the supply chain has made and trust throughout the British food system has been boosted.

However, 2021 is poised to bring a fresh set of challenges. The threat from coronavirus is still very real but could now recede as vaccines hit the market. The completion of the UK exit process from the EU will also present challenges and may lead to significant market adjustments. Finally, consumer attention is likely to return very directly to the environment as the 'green recovery' takes hold, the USA rejoins the Paris Agreement and the UK co-hosts the UN climate change summit.

It is encouraging that consumers see a distinction between 'global' and 'local' issues, but even issues we may see as 'global' can quickly become local due to complexities in supply chains. The use of soya in animal feeds, particularly for pork and poultry, and the difficulty in providing reliable sourcing information are prime examples of this. There are some issues that need to be proactively tackled and supply chains must be audited to head off future issues.

As other sectors such as transport, manufacturing and energy have forcibly had their carbon emissions reduced as a direct consequence of lockdowns, agriculture's share of emissions will look worse as a consequence, even temporarily which will apply more scrutiny. In this context, it is vital that British agriculture continues to be on the front foot in confronting the issues around the environment and to continue to demonstrate positive progress. Commitments to net zero are hugely positive, but the industry will need to make good on these commitments if it wants to retain the high trust levels it currently benefits from.

We know that preference for buying British is higher among those who prioritise the environment. Ultimately, prioritising and demonstrating care for the environment has the potential to become a compelling point of difference for the UK, both for exporters and domestically.

Report Author: Susie Stannard
Consumer Insight Manager, AHDB
susie.stannard@ahdb.org.uk

Susie Stannard has spent almost 20 years in the market research industry, focussing on consumer insight. She has worked for two large market research agencies (Millward Brown and Nielsen), focusing on the food and drink industries in areas such as brands, advertising, consumer usage and attitudes and how attitudes shape buying behaviour. She also worked for H.J.Heinz, supporting marketing and innovation. Latterly she brings these skills to the agriculture sector at the Agriculture and Horticulture Development Board (AHDB), where she focusses on leading insight into the Dairy sector, amongst other projects. She contributes to AHDB's Targeted Activity Group (TAG) on Animal Welfare and Behaviour.

AHDB's Consumer Insight team actively tracks, monitors and evaluates consumer behaviour, reporting on the latest consumer trends and picking out what they mean for the industry and agriculture.

Read more on consumer trends on our website **ahdb.org.uk/retail-and-consumer-insight** Follow @TheAHDB on Twitter and Facebook, to be alerted to articles as soon as they're published. Or sign up by dropping us an email: **strategic.insight@ahdb.org.uk**

Ask the analyst

If you'd like any more information on the areas covered or have suggestions for future content, then please emailus at **strategic.insight@ahdb.org.uk**

AHDB is a statutory levy board, funded by farmers, growers and others in the supply chain. Our purpose is to inspire our farmers, growers and industry to succeed in a rapidly changing world. We equip the industry with easy to use, practical know-how which they can apply straight away to make better decisions and improve their performance. Established in 2008 and classified as a Non-Departmental Public Body, it supports the following industries: meat and livestock (cattle, sheep and pigs) in England; horticulture, milk and potatoes in Great Britain; and cereals and oilseeds in the UK. AHDB's remit covers 72 per cent of total UK agricultural output. Further information on AHDB can be found at **ahdb.org.uk**

Produced for you by:
AHDB
Stoneleigh Park
Kenilworth
Warwickshire
CV8 2TL

T 024 7669 2051
E comms@ahdb.org.uk
W ahdb.org.uk
@TheAHDB

070039 1221