

Prepared for: Reputation Group

Trust in agriculture and the environment: Consumer attitudes

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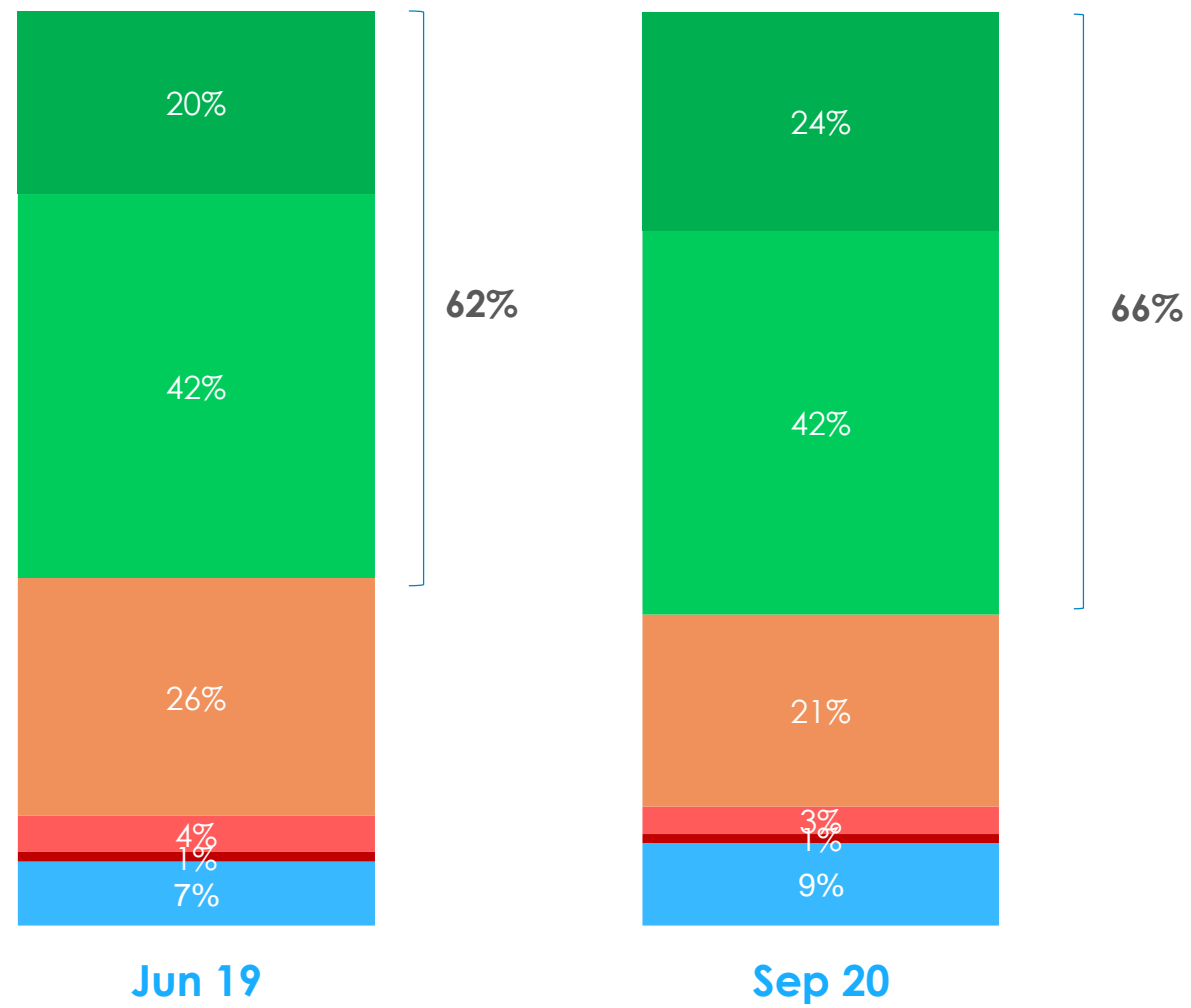
Agenda: Consumer Insight Update

- The Trust and Transparency study
 - Attitudes towards British agriculture and the supply chain
 - Focus on farming and the environment
 - Consumer friendly initiatives

Attitudes towards agriculture are broadly supportive, and have improved since last year



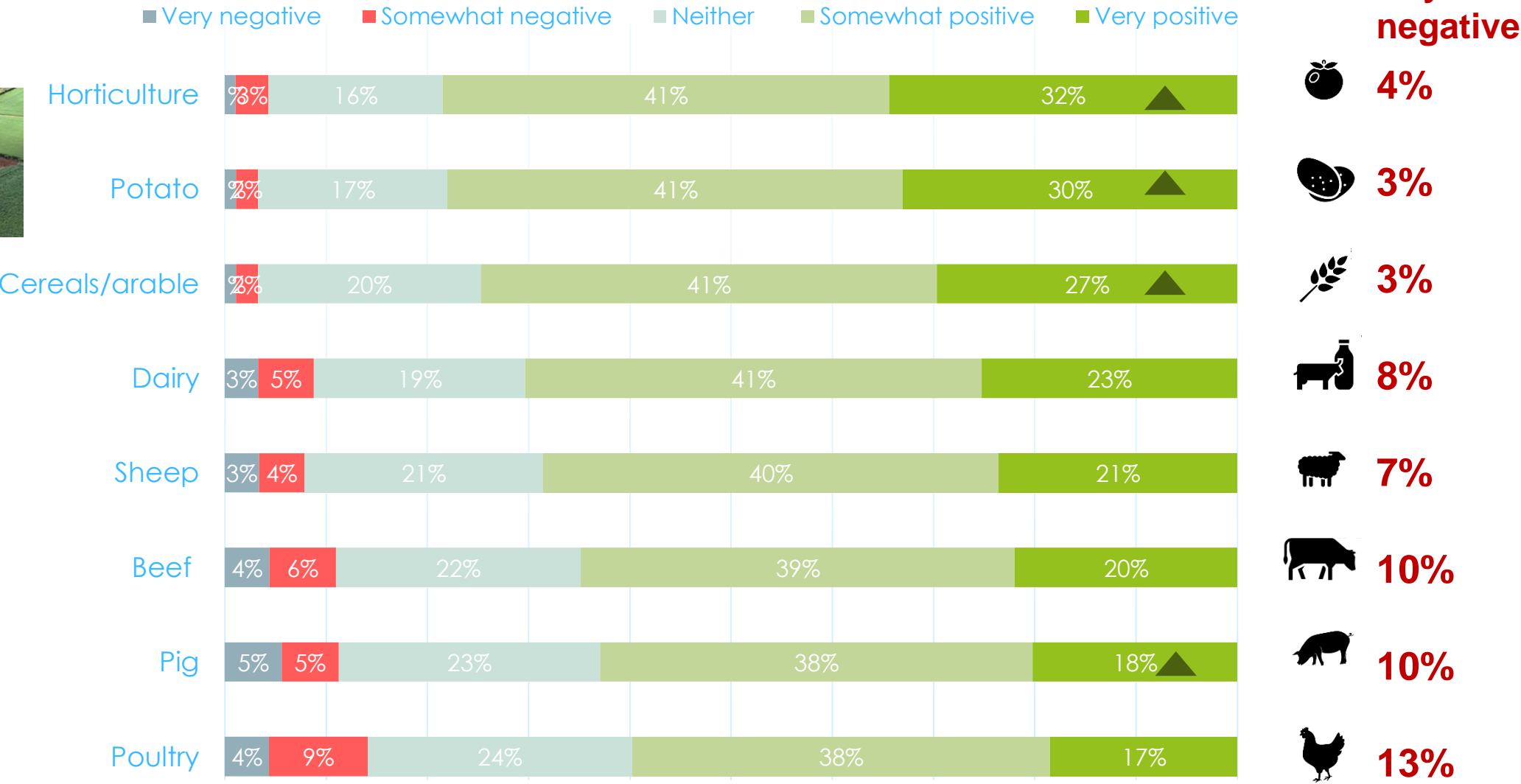
- Very positive
- Somewhat positive
- Neither positive nor negative
- Somewhat negative
- Very negative
- Don't know



Q25 Please indicate your overall impression of British agriculture today
Base all respondents W1 (1500), W2 (1578) W2 subgroups (262), (260), (155)



Livestock sectors are less well regarded, some improvement in arable sectors and pork this year



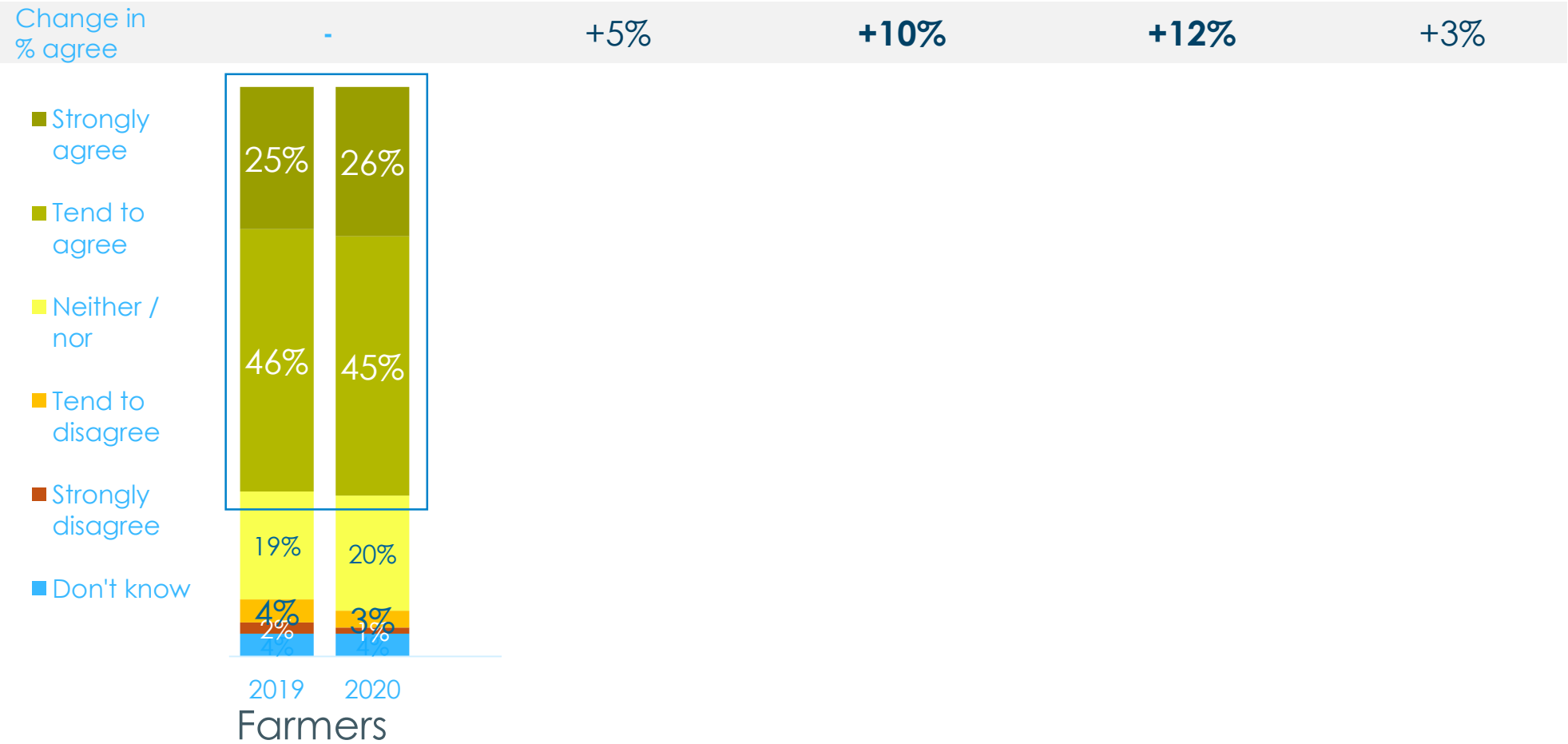
Q25 Please indicate your overall impression of the following... **Base** all respondents W1 (1500), W2 (1578)

Q25 Please indicate your overall impression of the following... **Base** all respondents (1500)

Farmers have maintained their position as most trusted group. But retailers and food service have deepened consumer trust



Trustworthy



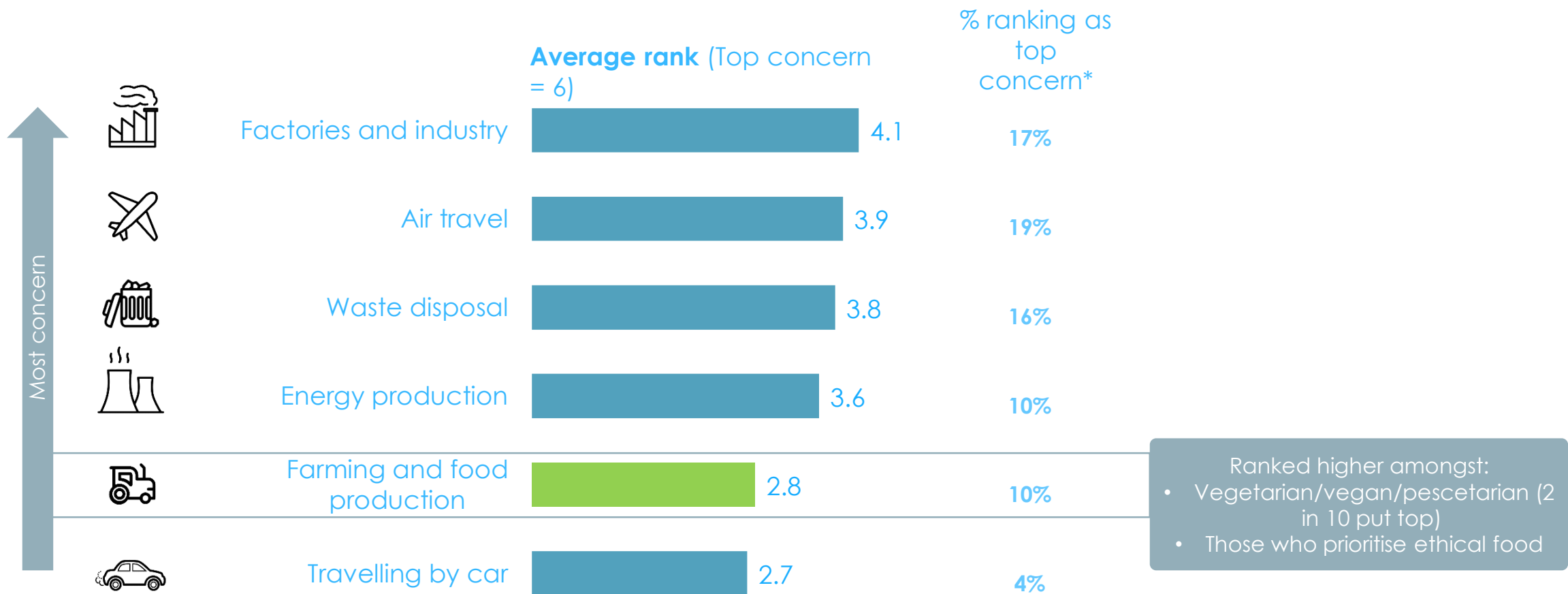
Q24 Thinking about all elements of the food system, how much would you agree or disagree with the following statements about each group on a scale of 1-5, where 1 is strongly disagree and 5 is strongly agree? A trustworthy group **Base** All respondents W1 (1500) W2 (1578)



A photograph of a golden wheat field under a blue sky with light clouds. A green horizontal band is overlaid across the middle of the image, containing white text.

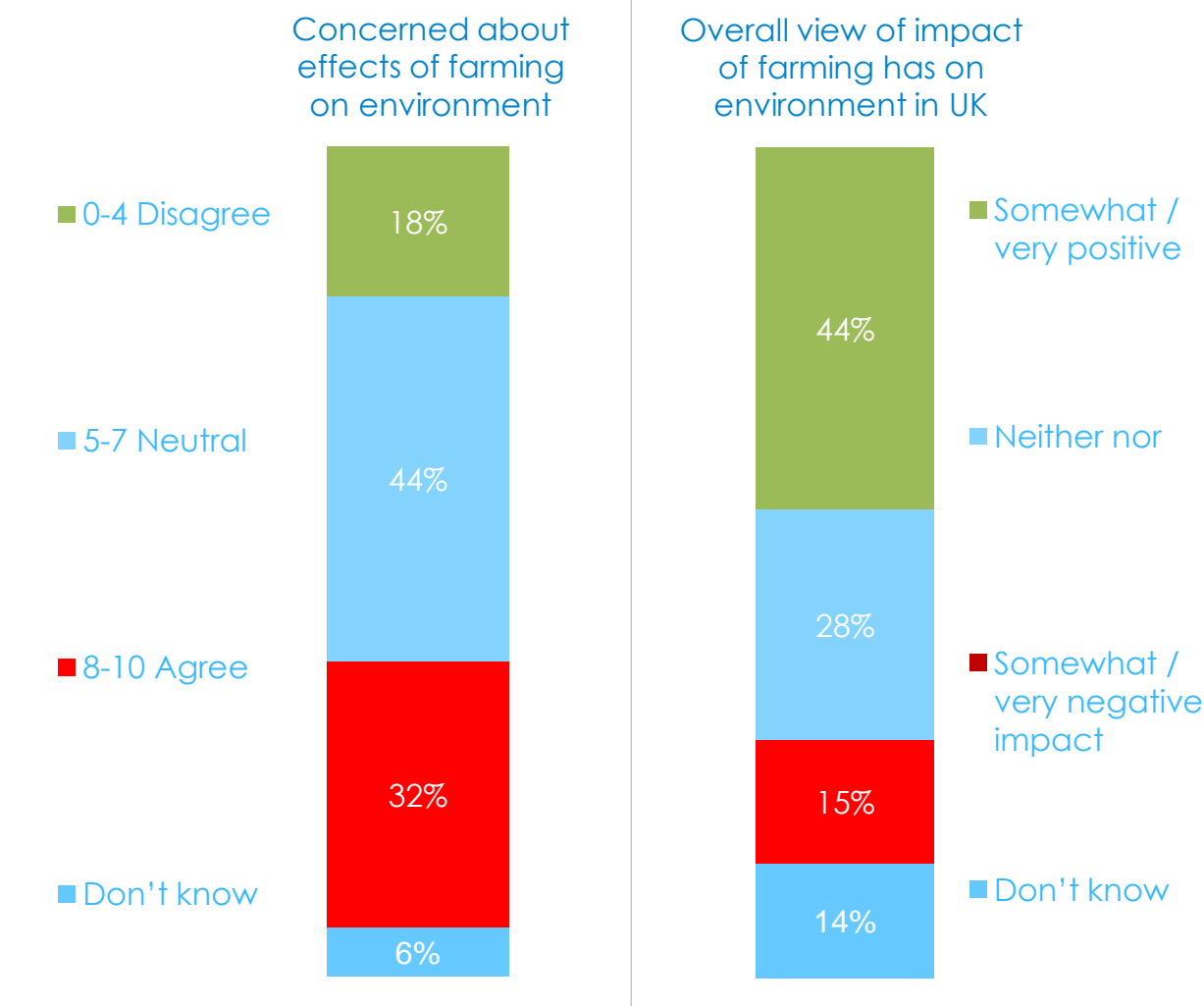
Focus on farming and the environment

Consumers put farming down the rank order in terms of concern for the environment



*20% said all were of equal concern, and 5% said 'none'

There is some distinction between opinions of farming locally versus globally



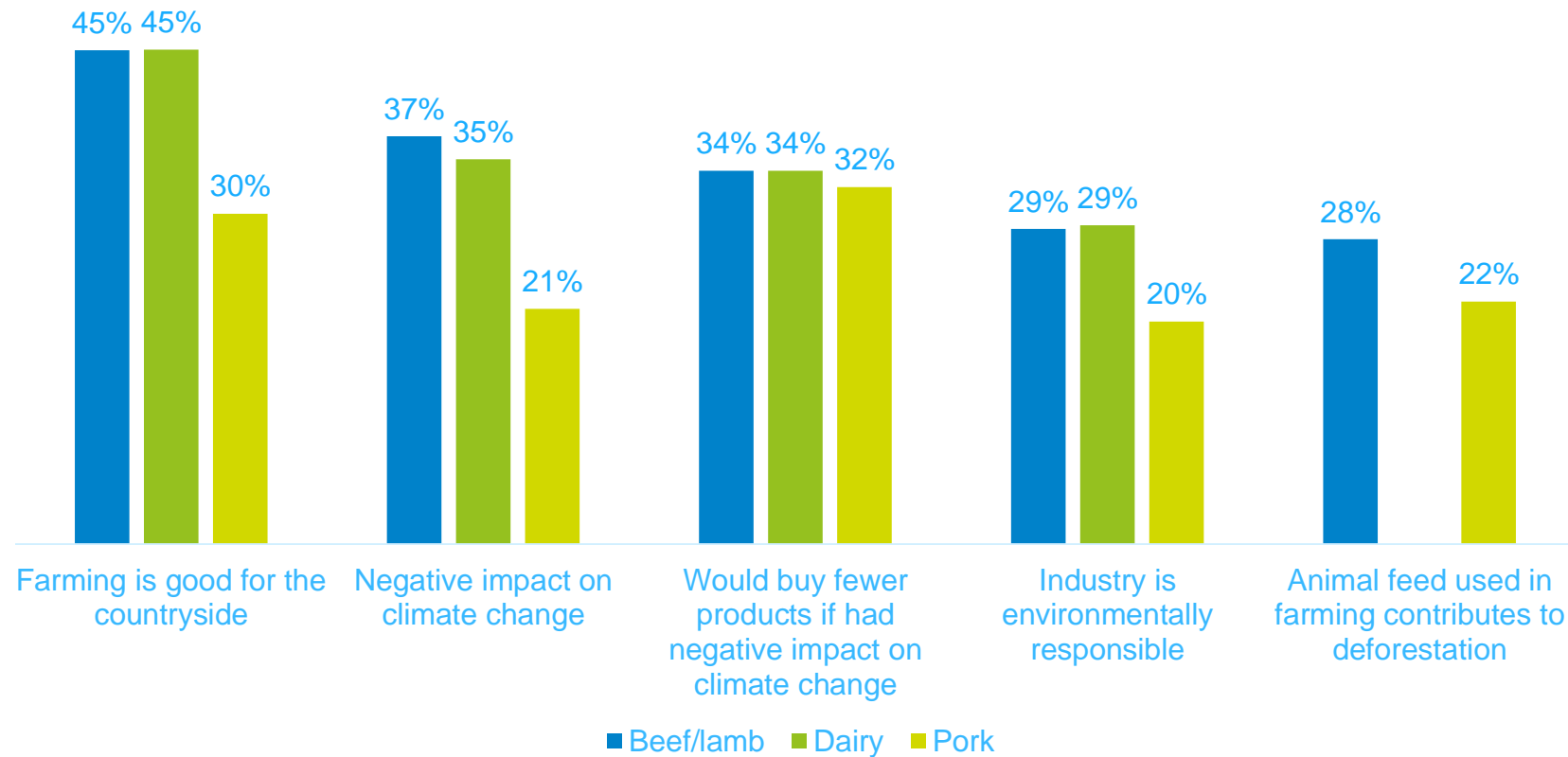
Q17 Agreement with statement - I am concerned about the effects of farming on the environment? **QFLEX3** On balance, what is your view of the impact that farming has on the environment in the UK? **Base** all respondents W2(1578)

Climate change implications of ruminant farming are a worry for about one third – there is a slightly different emphasis for pork

New for
Nov 2020
for meat

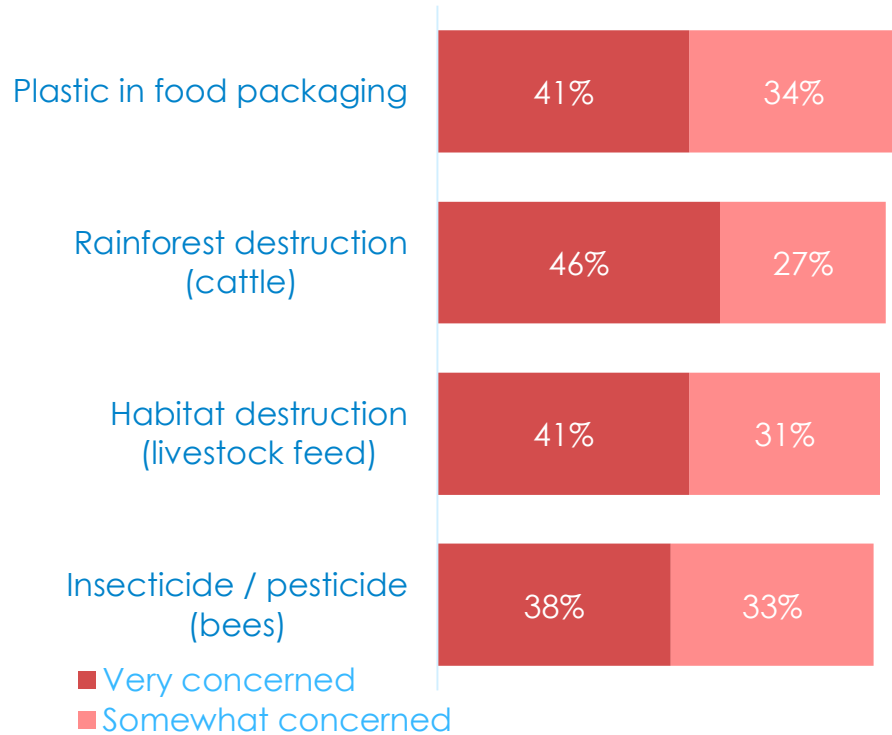
Perceptions of beef, sheep and pig farming (Nov-20)

Net: Agree



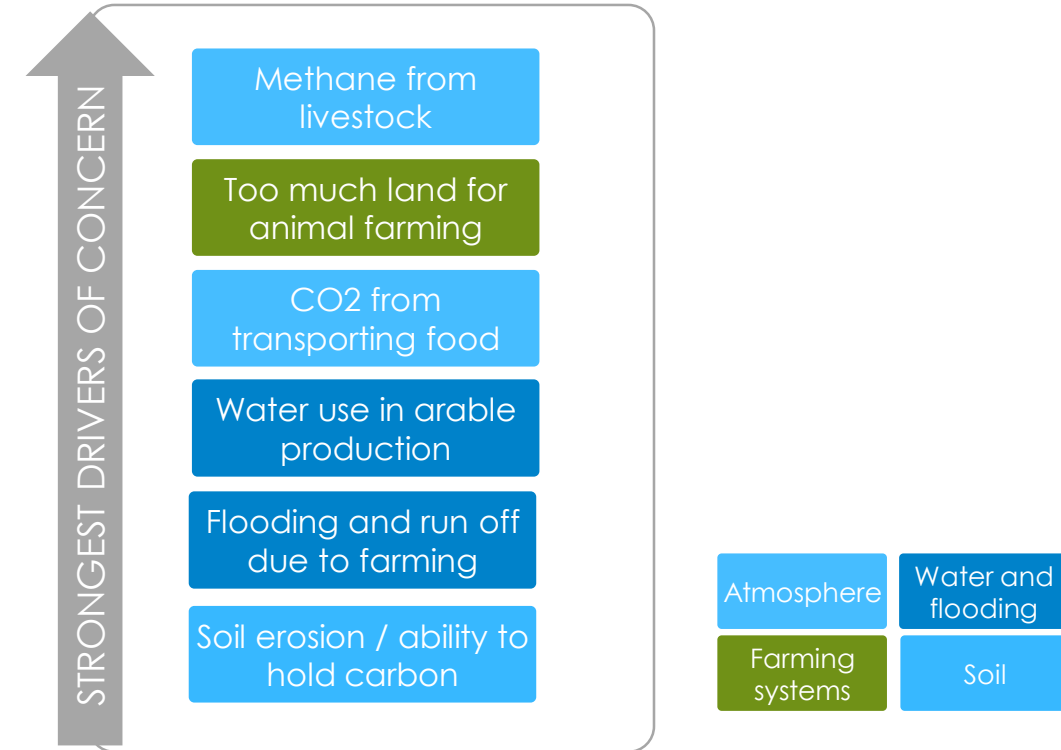
Key farming and environmental issues for consumers

Concerns ranked (of 20)



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

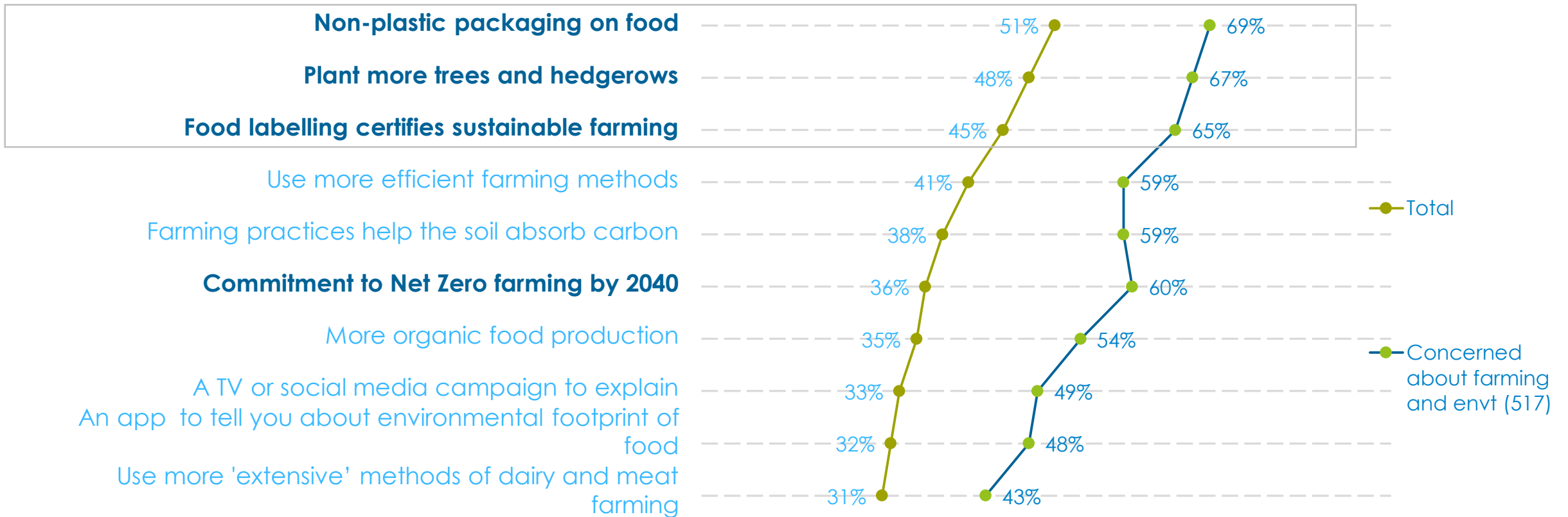
Key Drivers of believing farming is damaging to the environment



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

Two key initiatives are visible at point of sale: using non-plastic packaging and food labelling to certify sustainable farming.

% very interested in ideas in which farmers/supply chain could show they take protecting the environment seriously



Summary: Preference for simple solutions for complex problems



- Covid challenges has boosted trust in the supply chain
 - Farmers remain the most trusted group (yet least heard from)
- Environment is the fastest growing driver (although health the most influential)
 - Some separation of UK and global issues
 - Plastics are the top worry.
 - **But for meat/dairy reducers** more blame is laid at the door of grazing animals in particular (methane and land use).
 - Top initiatives for consumers would be **non-plastic packaging, tree planting on farm** and **labelling of sustainability**. For the most engaged/informed, **Net Zero commitment** should gain traction.

New report: Trust in farming and the environment



- Goes live on Friday
- Looks at consumer attitudes towards agriculture in UK
- Focus on the environment

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