Local food

Omnibus Research Report
Prepared for the Food Standards Agency by COI
March 2007

Background and Methodology

The Policy Commission on the Future of Farming and Food commented in their 2002 report that once local food became more established, DEFRA, the Food Standards Agency and Food for Britain would need to devise an enforceable definition of 'local', and that this might be a necessary first step for the full benefits of local branding to be realised. The Food Standards Agency decided, with the approval of the other two organisations, to carry out consumer research in order to assess shoppers' understanding of the term 'local food' and how important buying local food is to UK consumers. This had the broader purpose of determining whether it would be helpful to develop such a definition.

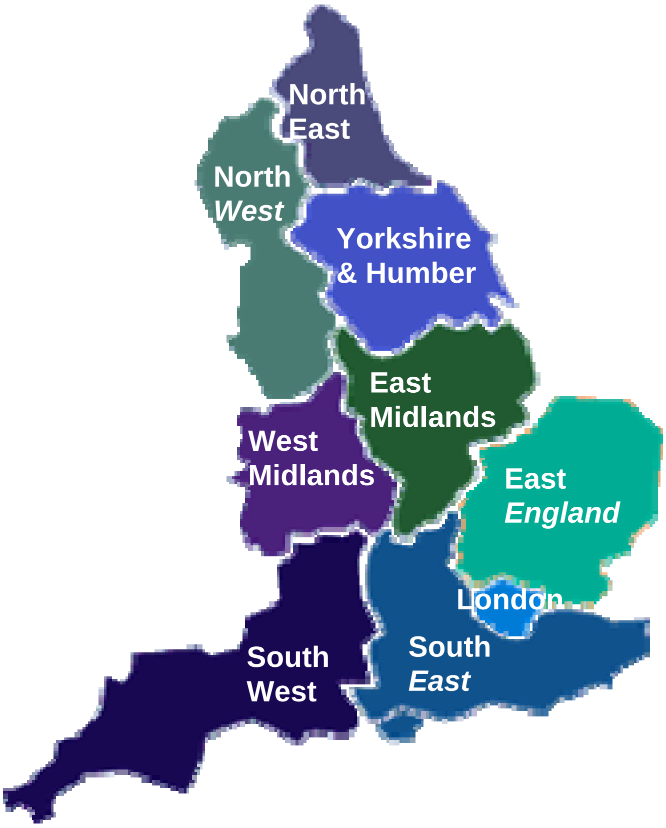
The Food Standards Agency commissioned consumer research in order to measure food shopping habits in the UK as well as shoppers' understanding of what the term 'local food' means and how important buying local food is to the UK population.

Questions were placed on the all adults' UK-wide omnibus survey run by RSGB Omnibus and these are detailed in Appendix 1. The Omnibus interviews were conducted face-to-face utilising multimedia CAPI (Computer Assisted Personal Interviewing). A representative sample (in terms of gender, age, and working status) of 1508 adults aged 16+ in the UK who were principal shoppers within the household were interviewed between the 10th and 14th January 2007. The data was weighted at the analysis stage to ensure that the final sample was demographically representative. Appendix 2 has the full sample profile (weighted), including demographic and regional breakdowns.

The social grade definitions referred to throughout this report are based on the Chief Income Earner in the household of the respondent. Brief explanations of the social grade definitions are shown in the table below:

Social Grade	Definition
A	Higher managerial, administrative or professional
B	Intermediate managerial, administrative or professional
C1	Supervisory or clerical, and junior managerial, administrative or professional
C2	Skilled manual workers
D	Semi and unskilled workers
E	State pensioners or widows (no other earner), casual or low grade workers

The map shown below illustrates the nine government regions across England that are referred to in this report. Respondents from Scotland, Wales and Northern Ireland were also included in this research.



Key Findings

Interpretation of term 'local food'

- Respondents had different interpretations of what the term 'local food' meant: most said it was from within a ten-mile radius (40%); but others defined it as from their county (20%), from their or their neighbouring county (15%) or from their region (20%).

- Shoppers from different parts of the UK had different perspectives on what size of area 'local' meant. Shoppers from Northern Ireland were three times more likely (64%) than average (20%) to understand 'local' to mean from their region.

- When prompted with a full description of some food products, most respondents did not think food sourced from outside their region but packaged or produced within it should be described as 'local food'.

Attitudes towards buying local food and the labelling of local food

- Shoppers were divided over the importance of buying local food: around half (56%) said it was important to them, while four in ten said it was not important (43%).

- Age was a key factor in shoppers' attitude towards buying local food. A third (31%) of those aged 16 to 25 said it was important for them to buy local food, compared with two thirds (67%) of those aged over 65.

- Those who said it was important to buy local food gave a variety of reasons for this. The top two reasons were about supporting local businesses (57%) and supporting the local area and/or community (51%). Other motivations included issues surrounding food quality, such as knowing where the producers were (18%) and fresher food (11%); and environmental factors, such as causing less air miles (12%) and less pollution (9%). One in ten (8%) said they did it because it was cheaper.

- Shoppers in London were more likely than average to mention environment factors, while shoppers from the North West, South West, Wales and Northern Ireland were more likely to be concerned about supporting local businesses.

- Three fifths of shoppers said that they checked food labels to see where products were from at least occasionally (13% always did so; 22% usually did and 25% did so occasionally), whilst two fifths rarely (18%) or never did so (22%).

- Those aged 16 to 25 were more likely (45%) to say they never checked food labels for this reason than those from other age groups (23% of 26 to 36 year olds, 20% of 36 to 45 year olds and 18% of those aged 50 and over). Shoppers from Scotland and Wales were most likely (32% and 31% respectively) amongst the Government regions to say they never checked labels to see where food was from.

- Women were more likely (15%) than men (9%) to say they always checked food labels to see where it was from, whilst those from social grade AB were least likely (11%) of all social grades (21% of C1C2s and 29% of DEs) to say they never read the labels to see where food was from.

- Six in ten (62%) shoppers felt there should be regulations or official guidance on what can be called ‘local food’, while a third (35%) felt it does not really matter.

- Those aged 16 to 25 were least likely (39%) to say there should be regulations/guidance in this area (compared with 57% of those aged 26 to 35, 65% of 36 to 49 year olds and 66% of those aged 50 and over). Shoppers from social grades AB were more likely (70%) than average (62%) to want to see regulations in this area, as were those from small country towns and villages (67% and 69% respectively).

- There was a strong correlation between those more likely to consider it important to buy local food, those who wanted the use of the term ‘local food’ regulated and those who frequently checked the labels to see where food was produced.

Main Findings

1. Shopping habits and interpretation of 'local food'

This chapter looks at where respondents carried out their food shopping (including their main shopping venue and other places they visited regularly to purchase food) as well as what they understood the term 'local food' to mean.

Respondents were first asked where they did most of their household food shopping, and were then asked to choose from a list any other places where they shopped for food on a regular basis. (Chart 1 shows the results).

Chart 1 Where do the majority of household food shopping and where visit regularly for food shopping (%)

Base : All principal shoppers

Q1/Q2 Where do you do most of your household food shopping/where else do you shop for food on a regular basis?

As Chart 1 shows, the vast majority of respondents did most of their food shopping in supermarkets: over three quarters (74%) did most of their food shopping at a large supermarket; and a further two in ten (22%) did most of their shopping at supermarket chain local shops, such as Tesco Metro and Sainsburys Local. A small minority did most of their food shopping at other locations, such as small grocery stores or corner shops (1%), local specialist shops, for example butchers and green grocers (1%) and online (1%).

While supermarkets dominated as the main venue for food shopping, other types of shops were also visited on a regular basis. A third (33%) of respondents regularly shopped for food in small grocery stores or corner shops, one in five (19%) visited local specialist shops and one in ten regularly shopped at farm shops (9%), street markets (8%) and farmers markets (8%).

There was some variation in food shopping habits across the Government regions. Those living in London were more likely (75%) than average (44%) to regularly shop at local supermarket chain shops, whilst those living in Yorkshire and Humberside and Northern Ireland were more likely (51% and 63% respectively) than average

(33%) to shop in small grocery shops and/or corner stores. Shoppers from Northern Ireland were also most likely (43%) amongst all regions to regularly use local specialist shops (compared with an average of 19%).

Shopping habits also varied depending on the type of area shoppers lived in. Table 1 shows where those living in major cities/towns, suburbs, small country towns and villages/the countryside regularly shopped.

Table 1 Where shop for food on a regular basis by type of area lived in (%)

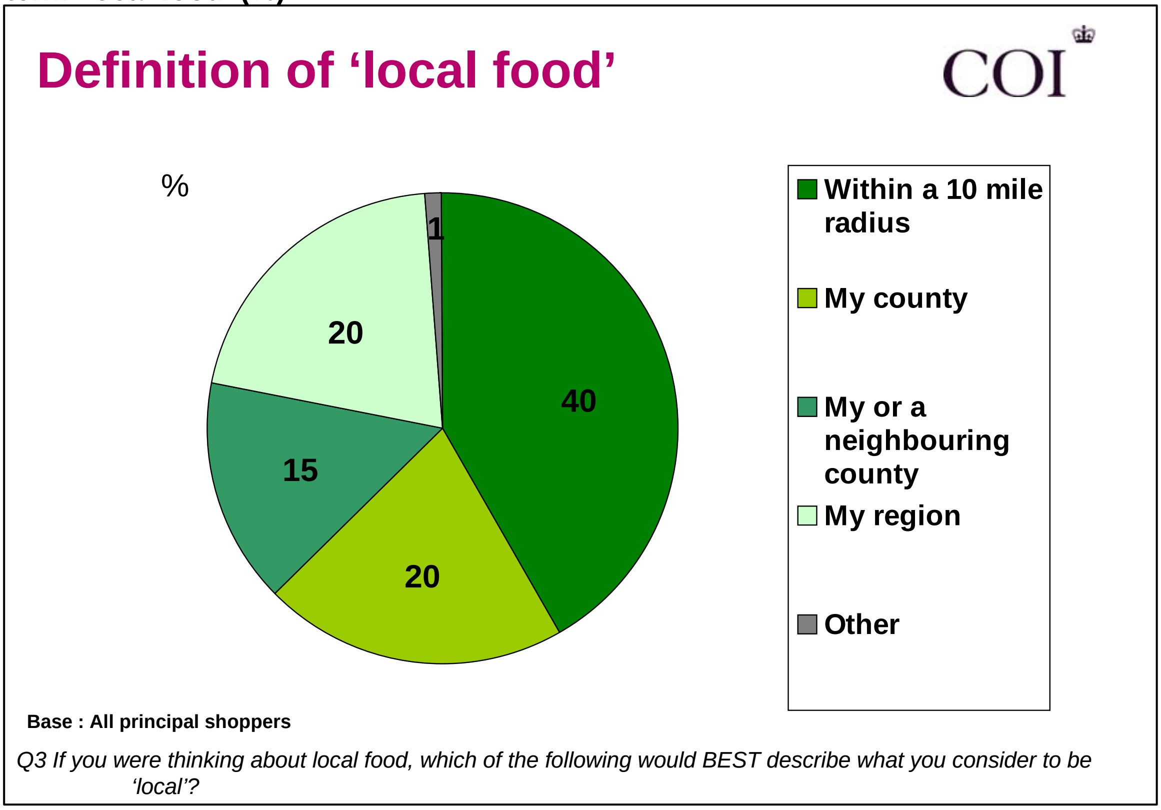
	All Shoppers	**Major town/city**	**Suburbs**	**Small country town**	**Village/ in the country**
Base	*1508*	236	644	345	263
Large supermarket	***83***	**83**	**84**	**86**	**79**
Supermarket chain local shops (e.g. Tesco metro)	***44***	**59**	**46**	**36**	**37**
Small grocery store / corner shop	***33***	**40**	**30**	**31**	**31**
Local specialist shop	***19***	**19**	**14**	**24**	**23**
Farm shops	***9***	**3**	**9**	**10**	**11**
Street markets	***8***	**10**	**7**	**8**	**6**
Farmers markets	***8***	**6**	**5**	**11**	**12**
Over the internet	***3***	**3**	**3**	**4**	**5**

Significant differences between the groups are highlighted on the table.

As Table 1 illustrates, those living in major towns and cities, and to some extent those living in the suburbs, were more likely (59% and 46% respectively) than those in small towns and in villages/ the countryside (36% and 37% respectively) to shop at supermarket local chain shops. By contrast, those in small towns and those in villages / the countryside were twice as likely (11% and 12% respectively) as those living in the suburbs or in a major town or city (5% and 6% respectively) to regularly shop at farmers markets.

In order to better understand shoppers' interpretation of the term 'local food', respondents were also asked which description of the term 'local' best matched what they considered to be food from their local area. (Chart 2 shows the results).

Chart 2 Definition of 'local' that best fits respondents' understanding of the term 'local food' (%)



Two in five shoppers (40%) said that 'local food' meant food from within a ten-mile radius of where they lived. One in five (20%) said that 'local' meant from their county and a further one in seven (15%) believed it meant from their county or a neighbouring one. One in five (20%) felt that 'local food' was from their region (e.g. South East, Scottish Highlands).

Once again, there was some variation in how respondents from each of the Government regions chose to define the term 'local'. Shoppers from Yorkshire and Humberside and from the South West were more likely (34% and 30% respectively) than average (20%) to interpret the word local to mean 'from their county'. Those living in the East Midlands were twice as likely (31%) as average (15%) to say local food came 'from their or their neighbouring county'.

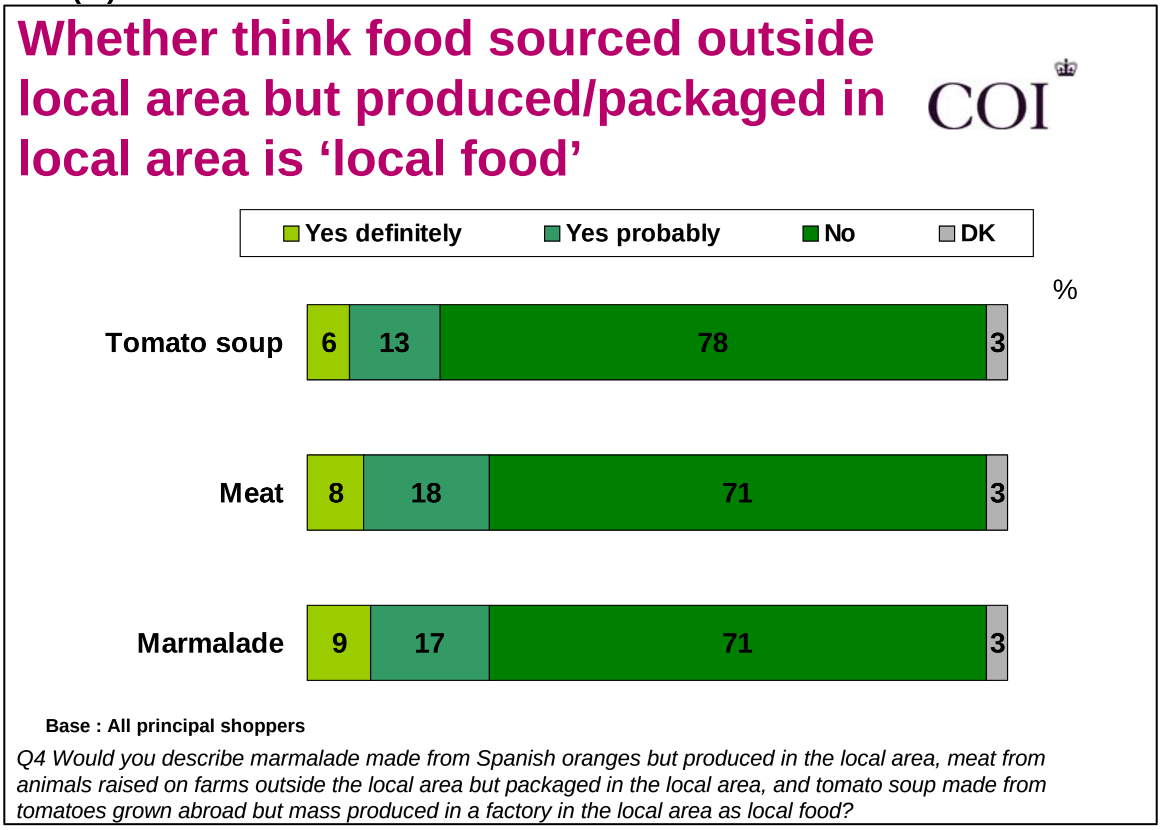
Shoppers from Northern Ireland had a distinct perspective to those from other Government regions: they were three times more likely (64%) than average (20%) to believe local food came 'from their region', and were less likely than average to think of a smaller geographic area, such as within a ten-mile radius of where they lived (12% compared with an average of 40%).

No significant differences were found by where consumers shopped, how important they considered it to buy local food or by how frequently they looked at the labels to see where food is from.

Respondents were also asked whether they would describe a range of food products as 'local' or not. To make it more personal to them, the question wording changed depending on their personal definition of 'local area' from question three. The full descriptions of the food products that respondents were asked about were as follows:

- marmalade which came from Spanish oranges but was produced in my 'local area' ('local area' substituted with one of the following: within a 10 mile radius of where I live/ in my county / in my or a neighbouring county / in my region);
- meat from animals which were raised on farms outside of my 'local area' but were sent to my 'local area' to be packaged;
- tomato soup which came from tomatoes grown abroad but was mass produced in a factory in my 'local area'.

Chart 3 Whether agreed food products could be described as from their 'local area' (%)



On the whole, the majority of respondents did not perceive food sourced outside of the local area, but packaged or produced in the local area, as 'local food'. As Chart 3 shows:

- 71% said they would not describe this marmalade as from their local area;
- 71% said they would not describe this meat as from their local area;
- 78% said they would not describe this tomato soup as from their local area.

Of the three food products described, shoppers were least likely to say that the tomato soup could be described as 'local food'.

Those from social grades AB were more likely than those from other social grades to feel that these food products could not be called 'local food'. Table 2 shows the proportion of shoppers from each social grade that would not consider each product to be 'local food'.

Table 2 Proportion who would <u>not</u> consider each food product as from their 'local area' by social grade (%)

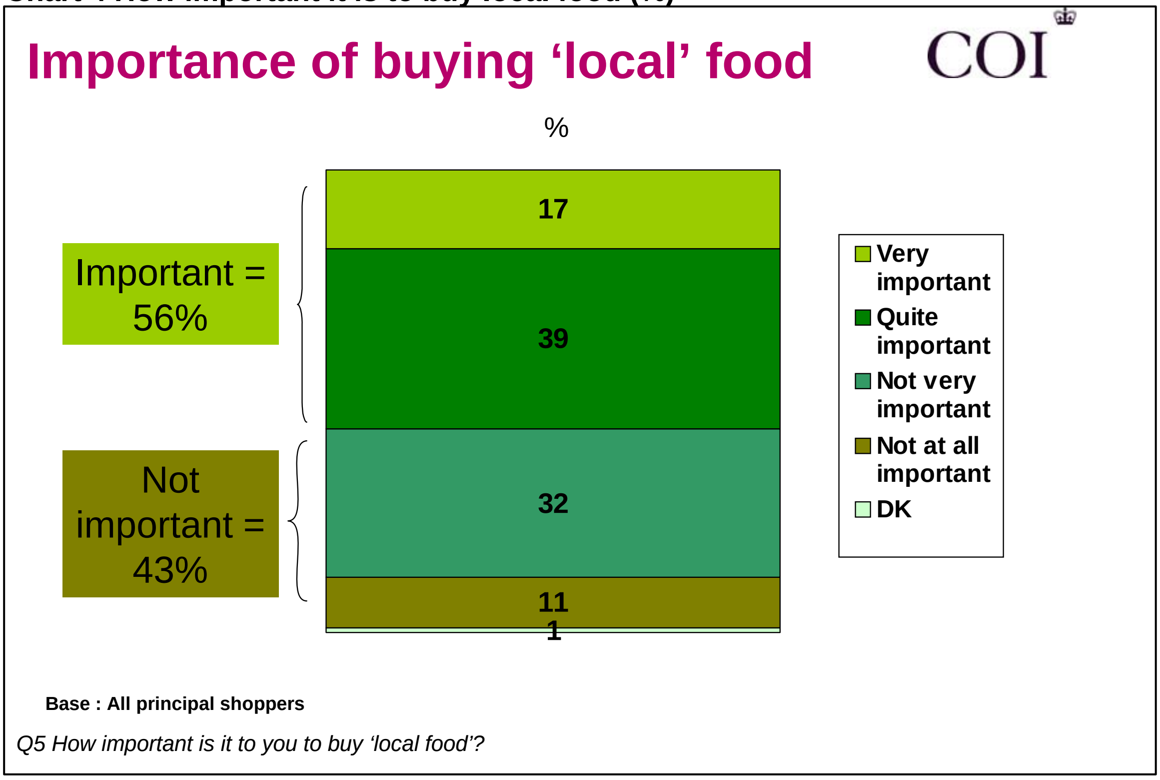
	All Shoppers	**AB**	**C1C2**	**DE**
Base	*1508*	284	664	560
Marmalade	***71***	**77**	**70**	**68**
Meat	***71***	**80**	**71**	**65**
Tomato Soup	***78***	**86**	**79**	**72**

Significant differences between the groups are highlighted on the table.

2. Attitudes towards buying local food and labelling of local food

This chapter considers respondents' attitudes towards buying local food: whether it was important to them to do so, and why; how often they checked food products to see whether they were produced locally; and whether they thought there should be regulations or official guidance on what the term 'local food' means.

Chart 4 How important it is to buy local food (%)



As Chart 4 illustrates, shoppers were divided over how important it is to buy 'local food'. Just over half (56%) felt it was important (with 17% saying it was very important), whilst four in ten (43%) said it was not important to them, with one in ten (11%) saying it was not at all important.

Table 3 Importance of buying local food by age of shopper (%)

	All shoppers	16-25	26-35	36-49	50-65	66+
Base	*1508*	141	234	400	380	353
Very important	*17*	7	11	16	18	26
Quite important	*39*	24	35	40	44	41
Not very important	*32*	45	39	32	29	25
Not at all important	*11*	22	13	11	8	7
Don't know	*1*	2	2	1	1	1

Significant differences between the groups are highlighted on the table.

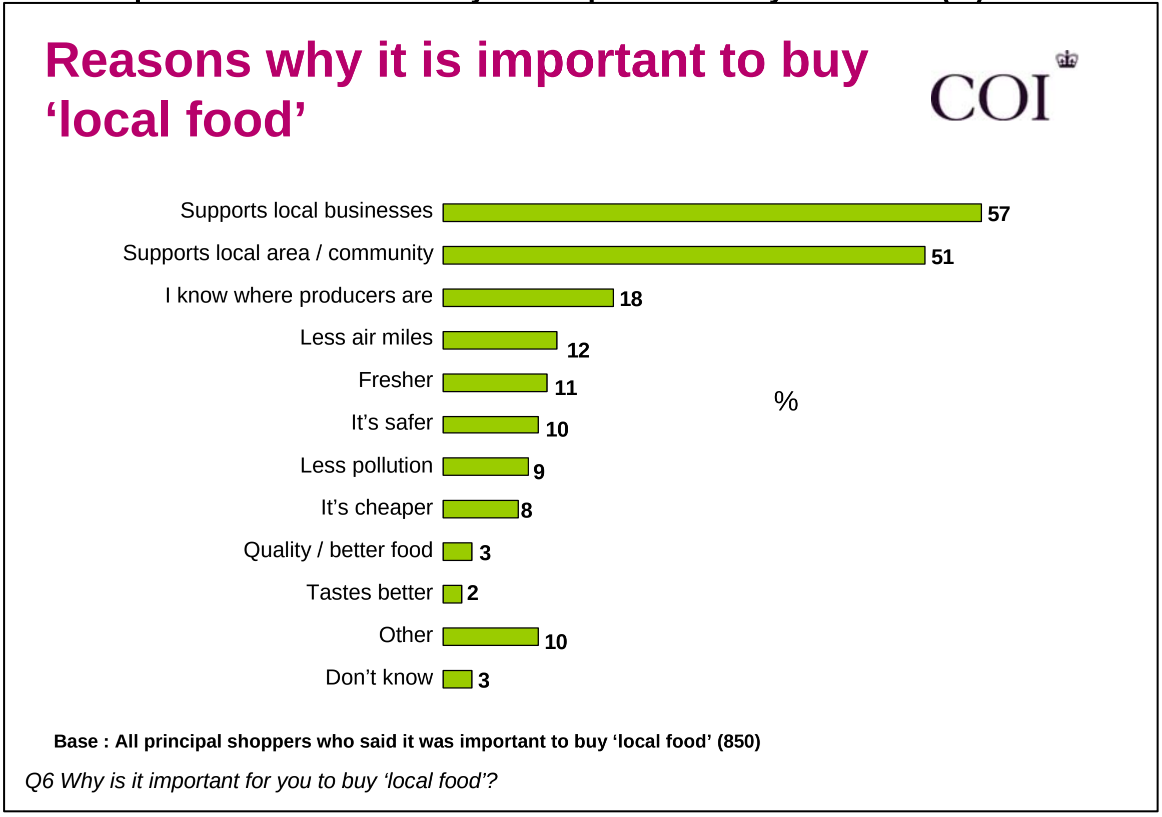
As Table 3 demonstrates, shoppers' propensity to feel that it is important to buy local food increased with age. Only a third (31%) of those aged 16 to 25 said it was important to them to buy local food, compared with two thirds (67%) of those aged 66 and over.

There were also some notable differences across the Government regions, with those in the West Midlands, Northern Ireland and the South West being more likely (34%, 29% and 26% respectively) than average (17%) to say it was very important for them to buy local food.

Those who regularly shopped at local specialist shops, farm shops, street and/or farmers markets (n=485) were also more likely (24%) than average (17%) to say that it was very important to them to buy local food.

Those who said it was important to them to buy local food (56% of the total sample) were asked the reasons for this. (Chart 5 shows the reasons given).

Chart 5 Spontaneous reasons why it is important to buy local food (%)



The top two reasons given were about supporting their local region or area – 57% said it was important to buy local food in order to 'support local businesses', whilst 51% said it important because it 'supports the local area/community'.

Others were motivated by better food quality and greater knowledge of the product. One in five (18%) shoppers said it was important to buy local food because it allowed them to 'know where the producers were'. One in ten (11%) said it meant the food was fresher, one in ten (10%) said it was safer, 3% said it gave them better/higher quality food and 2% said it tasted better.

Some referred to environmental motives for buying local food: one in ten (12%) said it meant 'less air miles' and one in ten mentioned that it caused 'less pollution' (9%).

One in ten (8%) said they did it for financial reasons, as it was 'cheaper' to buy local food.

The motivating factors varied throughout the Government regions. Shoppers in the North West, the South West, Wales and Northern Ireland (68%, 65%, 73% and 77% respectively) were more likely than average (57%) to say shopping for local food was important because it 'supports local businesses'. Shoppers in London were, by comparison, more likely than average to say they it was important to them because it was safer, cheaper or caused less pollution (23%, 24% and 17% respectively).

As well as asking about the importance of buying local food, respondents were also asked about how frequently they looked at the labelling on food products to see where it was produced and/or grown.

Chart 6 Frequency of looking at food labelling to see where it was grown/produced (%)

Base : All principal shoppers

Q8 How often, if at all, would you say that you look at the labelling on food you buy, to see where it was produced and grown?

As Chart 6 illustrates, one fifth (22%) of shoppers said they never looked at the labels to see where food was produced or grown, while one in five (18%) rarely did so. Just over one in ten shoppers (13%) said they always checked the labels on food for this reason, one in five (22%) usually did and a quarter (25%) occasionally did.

It should be noted that respondents were prompted to think specifically about the origin of food in this survey. When asked to describe what piece of information they looked for on food products that they were purchasing for the first time in the 2006 Consumer Attitudes Survey (CAS), only a minority (8%) of consumers spontaneously mentioned the origin of food as a key piece of information looked for on labels. Of the 70% of consumers in CAS who always, usually or occasionally looked at the labels, the majority were looking for nutritional and ingredient information.[1]

Women shoppers were more likely (15%) than men (9%) to say they always checked food labels to see where the products were grown/produced.

Younger people aged 16 to 25 were least likely of all age groups to check for this information on food labels, with nearly half (45%) saying they never did so.

As Table 4 illustrates, those from social grades AB said they checked to see where food was grown and/or produced more often than those from other social grades.

[1] Whilst CAS 2006 has a larger sample size and the question wording is not identical in both surveys, it is still useful to draw some comparison for illustrative purposes only.

Table 4 Frequency of checking labels to see where food is grown/produced by social grade (%)

	All shoppers	AB	C1C2	DE
Base	*1508*	284	664	560
Always	*13*	11	12	15
Usually	*22*	32	23	15
Occasionally	*25*	30	27	19
Rarely	*18*	16	16	22
Never / not seen	*22*	11	21	29
Don't know	*1*	1	1	1

Significant differences between the groups are highlighted on the table.

Shoppers living in Scotland were least likely (64% compared with an average of 78%) amongst all the Government regions to say that they checked the labels on food to see where it was from. By contrast, those living in the Southern regions of England (South West, South East, London, East of England and the East Midlands) were more likely than other regions to say they did check the labels for this information. Table 5 shows the results from each Government region in more detail.

Table 5 Frequency of checking labels to see where food is grown/produced by Government region (%)

	Base	At all	Never	DK
North East	62*	71	29	0
North West	169	75	23	1
Yorkshire & Humberside	124	75	25	0
East Midlands	121	80	20	0
West Midlands	122	75	25	0
East of England	138	80	19	1
London	195	82	16	1
South East	205	83	17	0
South West	144	85	15	0
Wales	77*	69	31	0
Scotland	108	64	32	4
Northern Ireland	43*	78	22	0

* small base

Significant differences between the groups are highlighted on the table.

Those who regularly shopped at local specialist shops, farm shops, street and/or farmers markets (n=485) were more likely (68%) than average (60%) to say that they looked at the labels occasionally, usually or always.

As Table 6 shows, there was also a correlation between how important respondents felt it was to buy local food and how frequently they looked at the labels to see where food was from. Those who thought it was very important to buy local produce were more likely (34%) than average (16%) to always check the labels to see where food was produced, whilst those who said it was not at all important were more likely (53%) than average (20%) to say they never looked for this information.

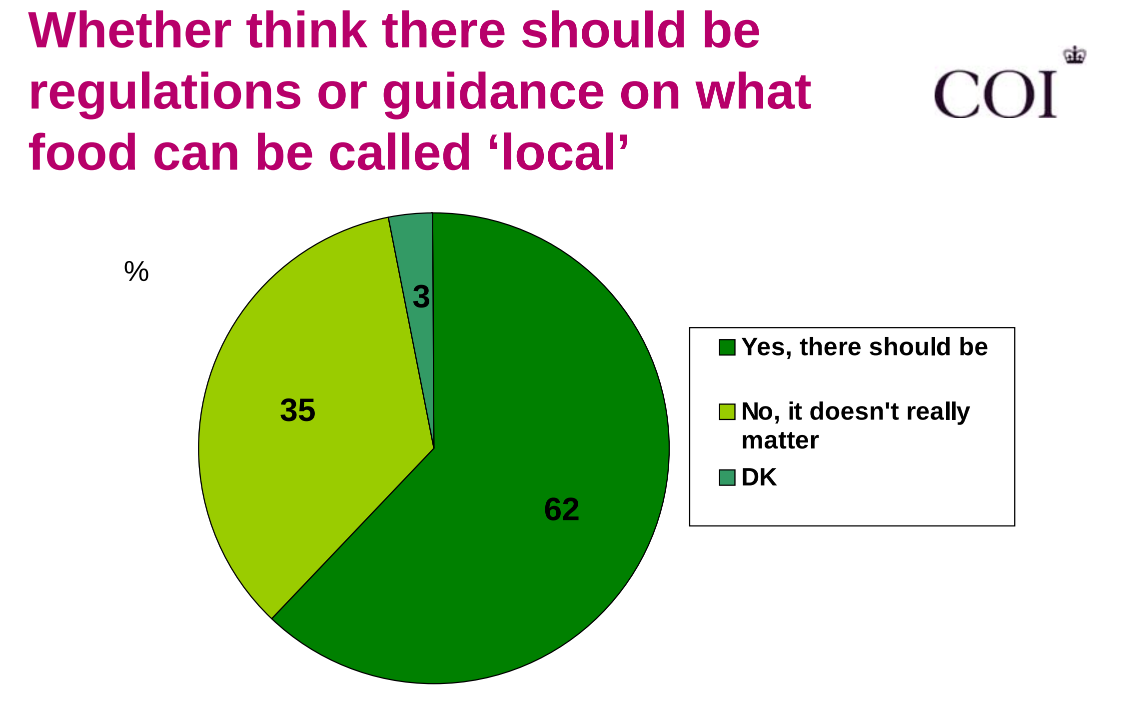
Table 6 Frequency of checking labels to see where food is grown/produced by importance of buying local food (%)

		Very impt	**Quite impt**	**Not very impt**	**Not at all impt**
	Base	235	543	442	146
Always	*174*	34	11	5	7
Usually	*305*	26	31	15	7
Occasionally	*345*	13	32	27	16
Rarely	*250*	10	16	25	16
Never / not seen	*299*	16	10	28	53

Significant differences between the groups are highlighted on the table.

All respondents were also asked whether they thought there should be regulations, or some sort of official guidance, about what food produce can be called 'local'. Chart 7 shows the proportion that agreed there should be and the proportion that felt it did not really matter.

Chart 7 Whether felt there should be regulations or guidance on what can be called 'local food' (%)



Base : All principal shoppers

Q7 Do you think there should be regulations or some sort of official guidance on what foods can be called 'local' or does it not really matter?

Six in ten (62%) respondents agreed that there should be regulations or official guidance on this issue, whilst a third (35%) felt it did not really matter.

Table 7 Proportion of shoppers who felt there should be a regulation, or official guidance about what is called 'local food' by age (%)

	All shoppers	16-25	26-35	36-49	50-65	66+
Base	*1508*	141	234	400	380	353
Yes, there should be	*62*	39	57	65	70	62
No, it doesn't matter	*35*	57	40	34	27	35

Significant differences between the groups are highlighted on the table.

Table 7 shows the proportion from each age group that felt such regulations and /or guidance were required. Two in five (39%) of those aged 16 to 25 said there should be some regulations or guidance, compared with seven in ten (70%) of those aged 50 to 65.

Those from social grade AB were also more likely (70%) than those from other social grades (63% of C1C2s and 56% of DEs) to want to see such regulation introduced, which reflects their greater propensity to check food labels to see where the products were grown/produced.

Those living in small country towns and those in villages or in the countryside were more likely (67% and 69% respectively) than those living in large towns/cities (59%) and those in suburbs (59%) to agree that there should be regulations or official guidance in this area.

Unsurprisingly, there was a correlation between those more likely to consider it important to buy local food and those who wanted the use of the term ‘local food’ regulated. Table 8 illustrates how those who felt it was very or quite important to buy local food were more likely (76% and 78% respectively) to want to see regulations in this area than those who felt it was not very or not at all important to buy local produce (48% and 29% respectively).

Table 8 Whether think there should be regulations to control the use of the term ‘local’ on food products by importance of buying local food (%)

		Very impt	Quite impt	Not very impt	Not at all impt
	Base	235	543	442	146
Yes, there should be regulations	*857*	76	78	48	29
No, it doesn’t really matter	*486*	23	20	49	69

Significant differences between the groups are highlighted on the table.

In socio-economic terms, it was shoppers over the age of 36 and those from social grades AB who were more likely than average to think it was important to buy local food and to say they wanted to see some guidance or regulations in this area.

There was also a correlation between those who wanted to see regulations about what could be called ‘local food’ and those who frequently checked the labels to see where food was from (Table 9). Over three quarters (78%) of those who always checked the labels to see where food was produced wanted to see regulations in this area, compared with 35% of those who never checked the labels for this information.

Table 9 Whether think there should be regulations to control the use of the term ‘local’ on food products by frequency of checking labels to see where food is produced/made (%)

		Always	Usually	Occasionally	Rarely	Never
	Base	174	305	345	250	299
Yes, there should be regulations	*857*	78	82	70	52	33
No, it doesn’t really matter	*486*	20	17	29	43	65

Significant differences between the groups are highlighted on the table.

Appendix 1 - Questionnaire

SHOW SCREEN

Q.1 Where do you do most of your household food shopping?

01: Large supermarkets
02: Supermarket chain local shops (e.g. Tesco Metro, Sainsbury Local)
03: Small grocery stores or corner shops
04: Local specialist stores (e.g. butchers, green grocers)
05: Over the internet (e.g. Ocado, Tesco online)
06: Street markets
07: Farmers markets
08: Farm shops
09: Other (specify)
(DK)

SHOW SCREEN – MULTICHOICE

Q.2 And where else do you shop for food on a regular basis?

(list as Q.1 minus answer coded at Q.1)
(N)
(DK)

SHOW SCREEN

Q.3 Some people use the term “local food” to describe food grown or produced in their local area. If you were thinking about “local food”, which ONE of these areas would BEST describe what you consider to be “local”?

01: From within a ten mile radius of where I live
02: From my county (e.g. Cornwall, London, Yorkshire)
03: From my county or a neighbouring county
04: From my region (e.g. South East, North East, West Country, Scottish Highlands, South Wales)
05: Other (type-in)
(DK)

Q.4 For each of the following types of food, please tell me whether you would consider it to be "local food" or not…

(scripter: for the statements below, the "substitute text" depends on the answer coded at Q.3, as follows:-

01 = A ten mile radius from where you live
02: Your county
03: Your county or a neighbouring county
04: Your region
05: (as answer typed-in)
DK – Your local area

SHOW SCREEN

….marmalade which came from Spanish oranges but was produced in (insert text)
…meat from animals which were raised on farms outside of (insert text) but were sent to (insert text) to be packaged
…tomato soup which came from tomatoes grown abroad but was mass produced in a factory in (insert text)

01: Yes, this is definitely local food
02: Yes, this could probably be described as local food
03: No, I wouldn't consider this to be local food
(DK)

SHOW SCREEN

Q.5 And how important is it to you to buy "local food" ?

01: Very important
02: Quite important
03: Not very important
04: Not at all important
(DK)

(route: ask Q.6 if 01 or 02 coded at Q.5, others go to Q.7)

DO NOT SHOW SCREEN FOR NEXT QUESTION

MULTI CHOICE

Q.6 And why is it important for you to buy "local food"?
PROBE: Why else? PROBE FULLY.

01: I know where the producers are
02: It supports local businesses
03: It supports the local area\community
04: It's cheaper
05: It's safer
06: Less air miles
07: Less pollution
08: Other (specify)
(DK)

SHOW SCREEN

Q.7 Do you think there should be regulations or some sort of official guidance on what foods can be called ‘local’ or does it not really matter?

01: Yes, there should be regulations or official guidance
02: No, it doesn’t really matter
(DK)

SHOW SCREEN

Q.8 How often, if at all, would you say you look at the labelling on food you buy, to see where it was produced and grown?

01: Never \ Not seen
02: Rarely
03: Occasionally
04: Usually
05: Always
(DK)

SHOW SCREEN

Q.9 And finally in this section, to help us analyse this information, which of these best describes the area in which you live?

01: Major town or city centre
02: Suburbs or a large town or city
03: In a small country town
04: Out in the countryside\in a village
(DK)

Appendix 2 – Sample Profile (weighted)

Principal Shoppers	All UK (1382) %
Sex:	
Male	37
Female	63
Age:	
16 - 25	7
26 - 35	16
36 - 49	23
50 - 65	15
66+	40
Social Grade:	
AB	21
C1	27
C2	19
DE	33
Working Status:	
Full-time (30+ hours per week)	36
Part-time (8 - 29 hrs. per wk.)	14
Part-time (under 8 hrs. per wk.)	1
Retired	28
In full-time higher education	2
Unemployed (seeking work)	4
Not in paid employment (not seeking work)	14
Government Region:	
North East	4
North West	11
Yorkshire & Humber	9
East Midlands	8
West Midlands	8
East of England	9
London	13
South East	13
South West	9
Wales	5
Scotland	7
Northern Ireland	3