

PROJECT
PROVENANCE

Where your food comes from ...

February 2019

grasp

Where does your food come from ...

In February 2019, the United Kingdom is weeks away from leaving the European Union. Our food security as a nation is once more under scrutiny and - arguably - felt to be sadly lacking. Environmental issues also seem to make the news on a weekly basis, often connected to the food we eat. How does Britain feel about locally produced food? Can we be specific and relate this to the England's largest County, for the benefit of the food industry in the County and as a case study for the wider UK farming, food production, foodservice & retailing communities?

Where does your food come from ... method

We opened an online survey in late January 2019, promoting it on social media and in emails to individuals across the UK. This survey closed on 12th February with 143 responses.

Executive Summary: What have we learnt?

- **For those “from Yorkshire” or resident in the County, “Yorkshire Food” can command a premium between 11 & 13%.** It is harder for Yorkshire to mean something to those who do not have a direct connection to the County. *Driving new connections to the County can only help widen appeal: visibility of “Yorkshire” on products from the County, ensuring distribution of Yorkshire products and delivering disruptive Yorkshire experiences (e.g. London pop-ups / inbound tourism / celebrating icons like forced rhubarb nationwide).*
- **Within Yorkshire, the scale of the County tends to mean local is below a 40 mile radius.** Whilst this complicates a “Yorkshire” proposition, *a tiered approach can help unlock the richness of the County’s offering: from Yorkshire Ale, via Real Yorkshire Wensleydale, to Pontefract Cakes.*
- **Yorkshire Pudding is the County’s standard-bearer!** This has been recently evidenced by social media reactions to the Yorkshire Pudding Wrap ... *the County can integrate other Yorkshire icons more closely with Yorkshire Puddings. Cheese (esp. Wensleydale) is also a major connection: Yorkshire can also make more of its’ cheese, rhubarb, meat & beer!*

The UK only produces 50% of what we consume

3.1 Origins of food consumed in the UK 2017 3.4 UK trade in different food groups, 2017

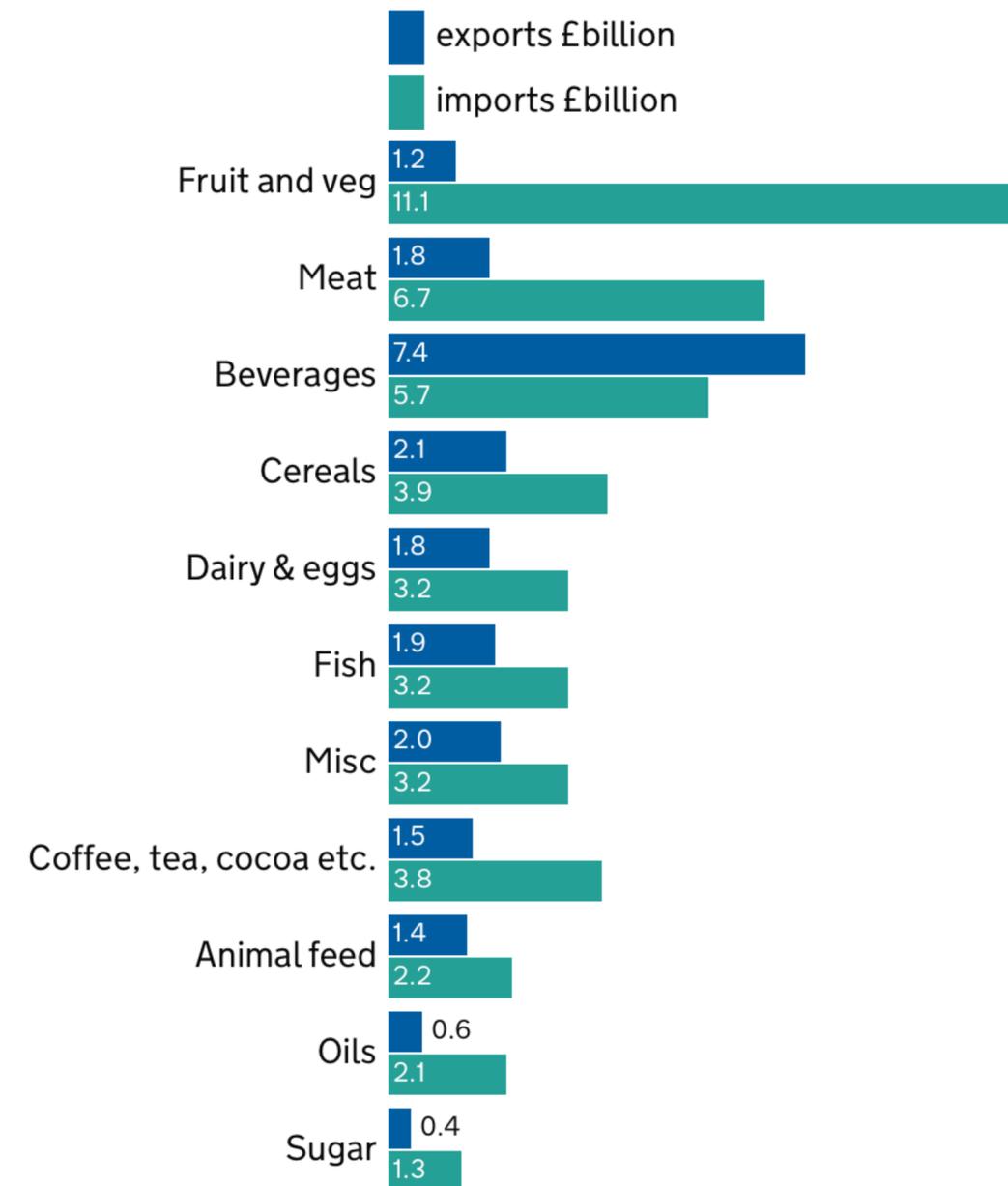
[Change between chart and table](#)



... we were - ironically - only buying 29% of our food from the EU when we voted to leave. We are now buying 30%.

^a UK origin consists of UK domestic production minus UK exports

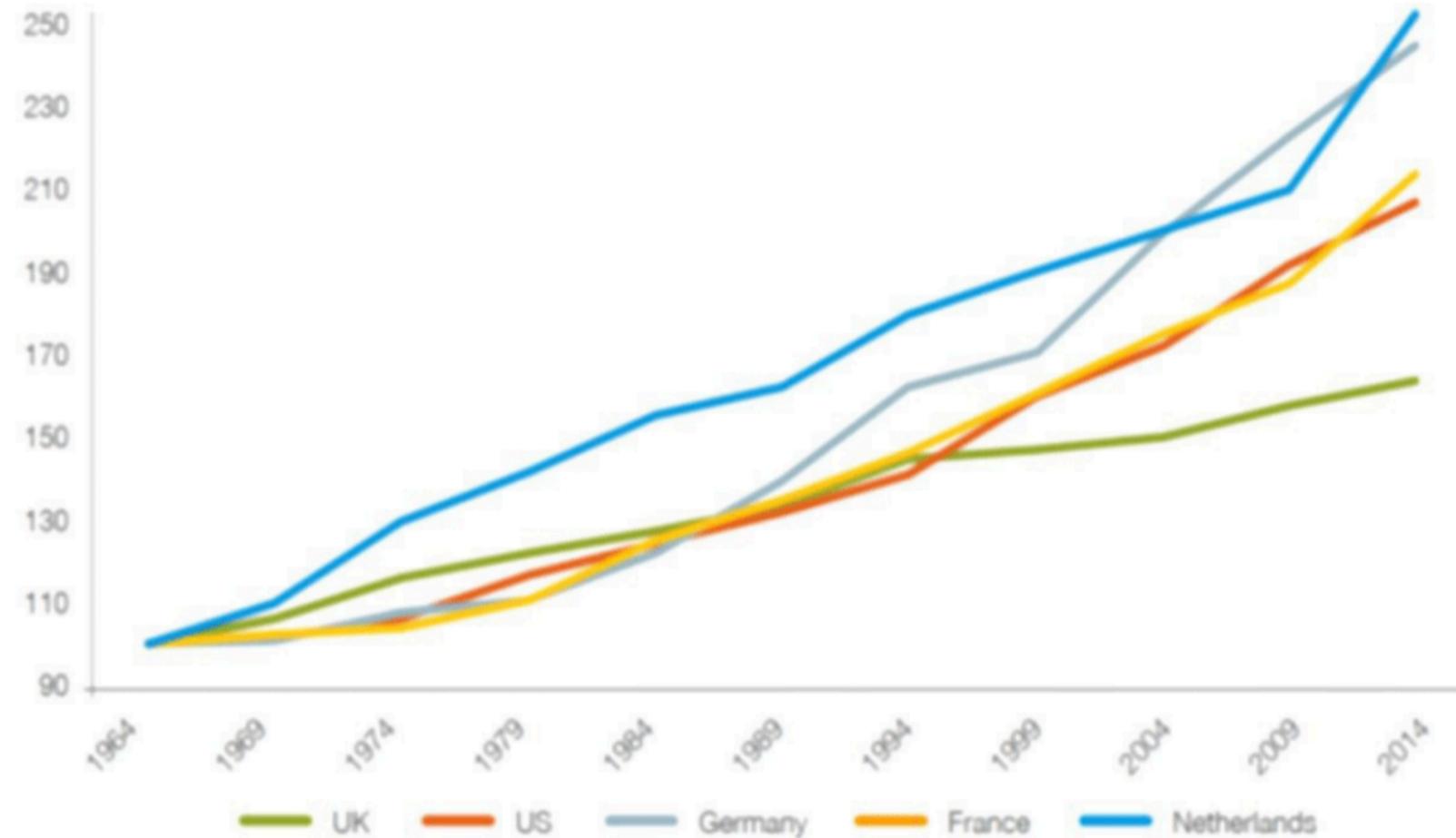
[Change between chart and table](#)



UK agricultural productivity grows slower than peers



UK Productivity lagging



UK Productivity shows marginal increase BUT comparatively losing ground on key EU countries and US.

Figure 1. Total factor productivity (TFP) annual growth 1964–2014

Yorkshire only undertrades in Dairy

Yorkshire & the Humber



For the **Yorkshire & the Humber** region:

- Total Income from Farming decreased by 25% between 2012 and 2016 to £437 million (compared to a 30% decrease for England as a whole).
- The biggest contributors to the value of the output (£2.1 billion), which were pigs for meat (£259 million), poultry (£223 million), wheat (£198 million) and milk (£178 million), together account for 41%.

9.7% of England's population

Crops:

(Thousand hectares)	Yorkshire & The Humber		England
Wheat	235	(14%)	1,684
Barley	121	(15%)	791
Oilseed rape	74	(14%)	543
Potatoes	18	(17%)	104
Field veg	14	(15%)	93
Glasshouse	0.2	(13%)	1

Figures in brackets denote the proportion which the region contributes to the English total. (Source: Defra, June Survey)

Livestock:

(Thousand head)	Yorkshire & The Humber		England
Cattle	541	(10%)	5,253
Dairy herd	84	(7%)	1,125
Beef herd	82	(12%)	698
Pigs	1,472	(38%)	3,911
Poultry	14,886	(12%)	128,879
Table chicken	9,307	(11%)	85,328
Turkeys	420	(11%)	3,890
Sheep	2,129	(14%)	15,283

Figures in brackets denote the proportion which the region contributes to the English total. (Source: Defra, June Survey)

What does Britain think about buying local produce?

YouGov[®]

79% of GB Adults think it's important that Brits Buy Local Produce

In: Food & drink, Lifestyle, Politics & current affairs

June 05, 2015, 12:20 p.m.

... but only 30% had bought any in the last week

In this YouGov research from 2015 ... **Scots were most concerned about local produce, with 90% stating it was important that people in Britain buy locally sourced produce ... followed by 85% of those from Yorkshire and the Humber. Only 68% of those in London thought it was important.**

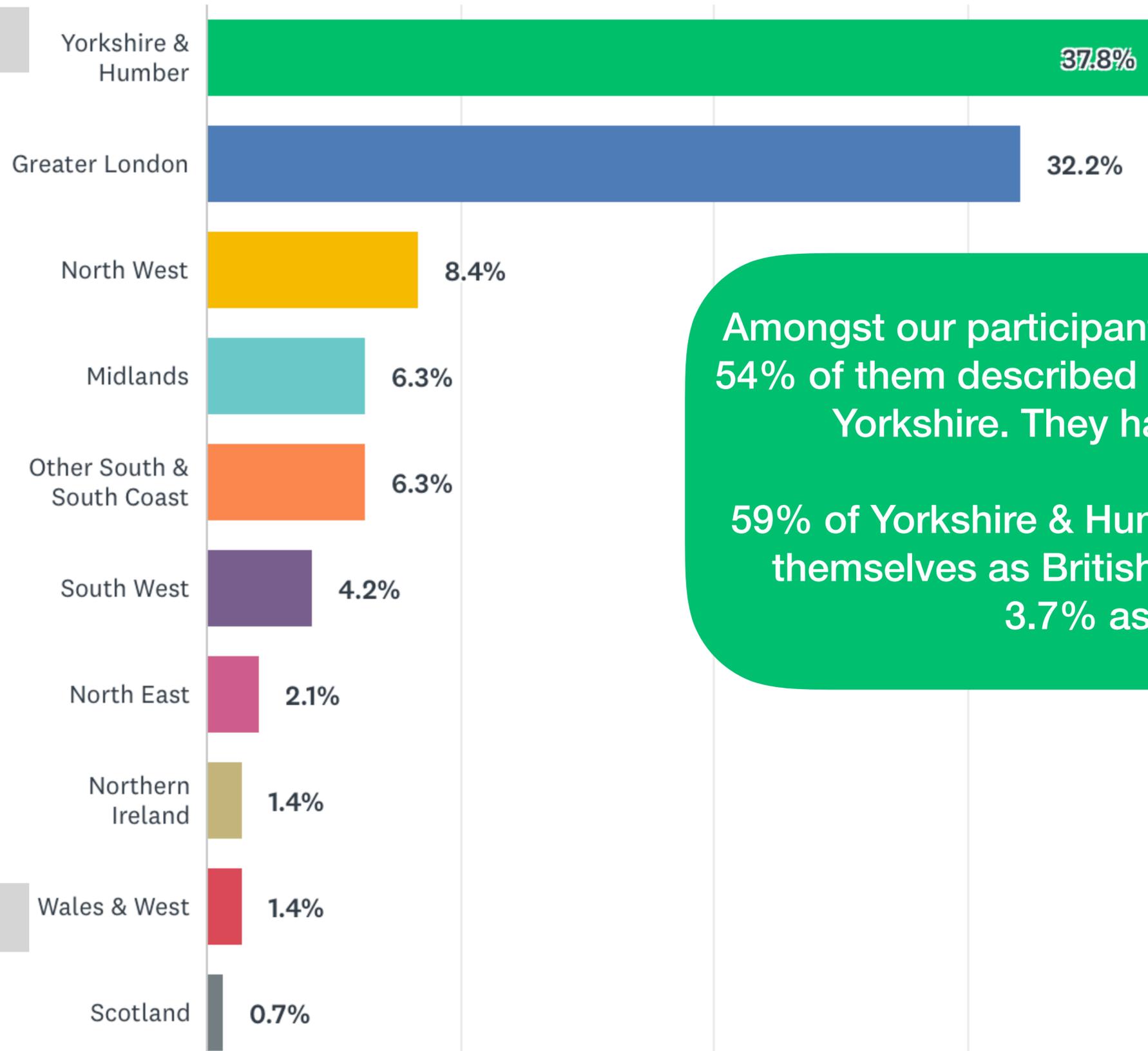
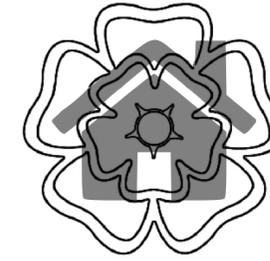
17% of 18-24 year olds felt it was very important to buy locally sourced produce, 37% of over 55s.

grasp

38% of our participants live in Yorkshire & Humber

Where do you live?

Answered: 143



Amongst our participants living in Yorkshire, only 54% of them described themselves as being from Yorkshire. They had other choices ...

59% of Yorkshire & Humber residents described themselves as British, 15% "other English", 3.7% as Scottish.

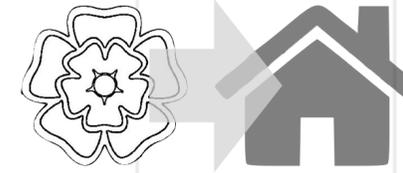
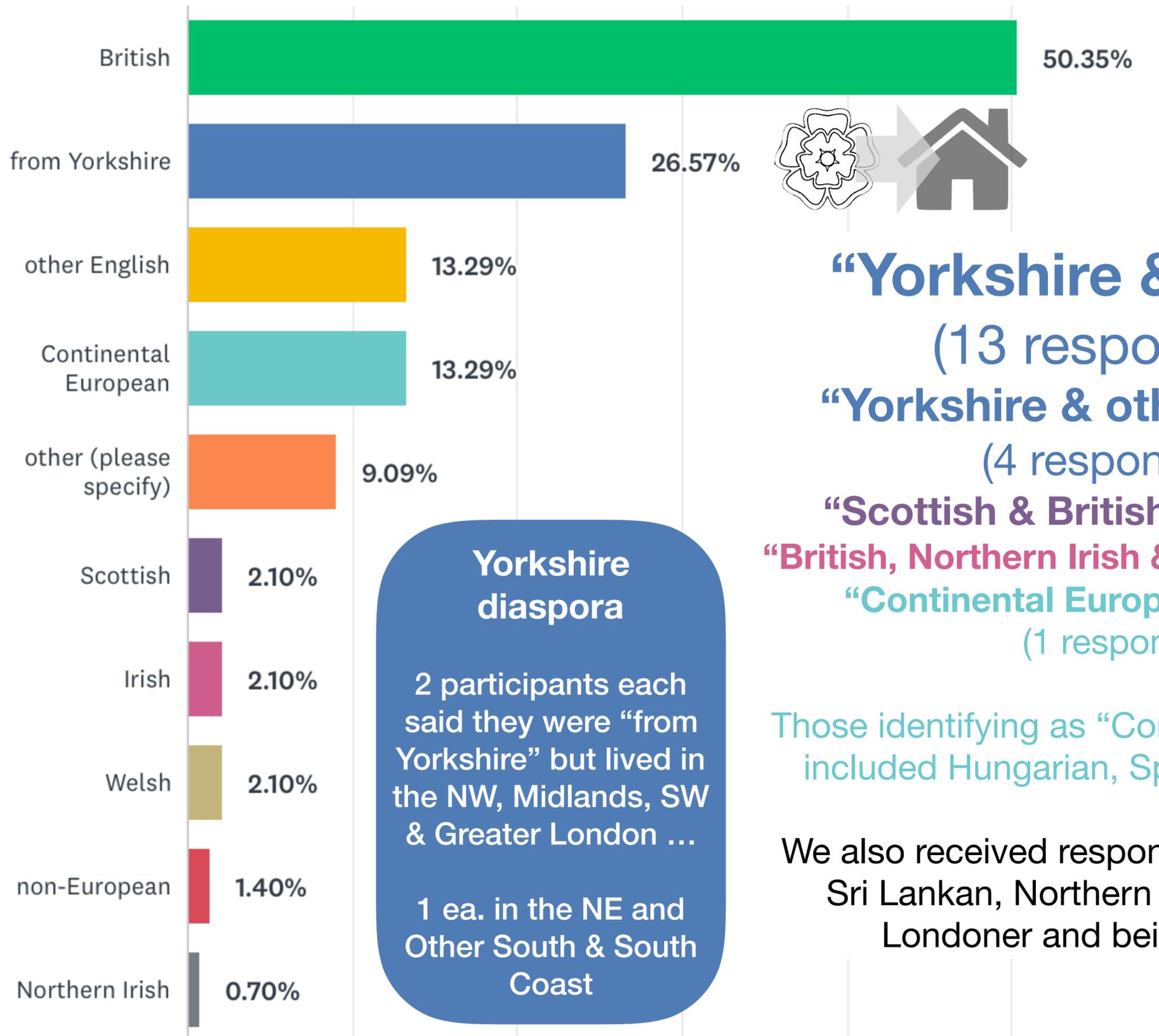


The av. participant gave themselves 1.2 descriptions

How would you describe yourself?

(Please select all that apply)

Answered: 143



Yorkshire diaspora

2 participants each said they were “from Yorkshire” but lived in the NW, Midlands, SW & Greater London ...

1 ea. in the NE and Other South & South Coast

“Yorkshire & British”

(13 responses!)

“Yorkshire & other English”

(4 responses!)

“Scottish & British” (2 response)

“British, Northern Irish & Irish” (1 response)

“Continental European & British”

(1 response)

Those identifying as “Continental European” included Hungarian, Spanish & German.

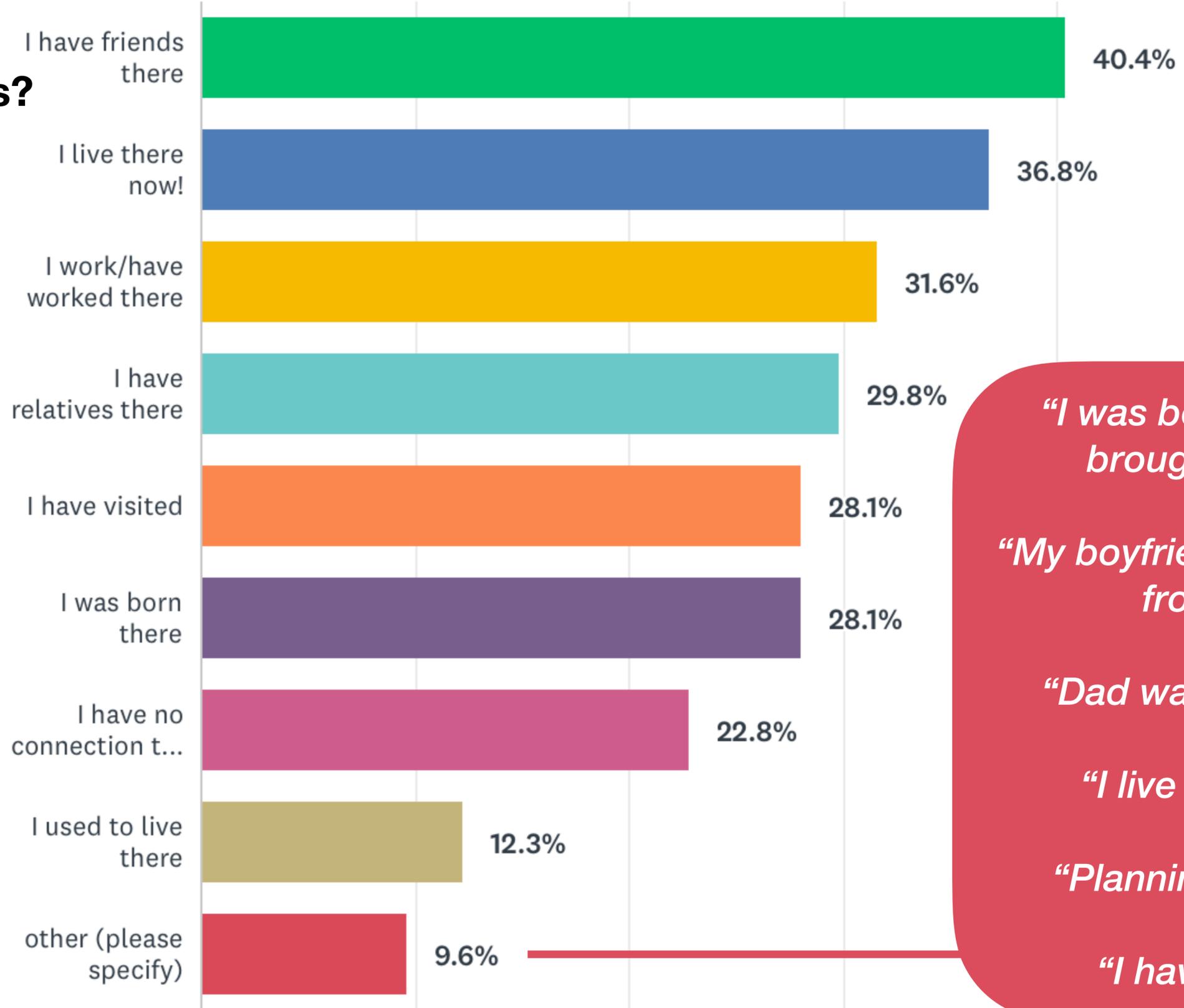
We also received responses for Caribbean, Sri Lankan, Northern English, being a Londoner and being a person!

The most common Yorkshire connection is friends

Do you have any Yorkshire connections?

(Please select all that apply)

Answered: 114



“I was born in Cheshire but brought up in Halifax”

“My boyfriend and his family are from Yorkshire”

“Dad was born in Yorkshire”

“I live near the border”

“Planning to move there!”

“I have clients there”



Amongst non-residents ...

(Base: 89)

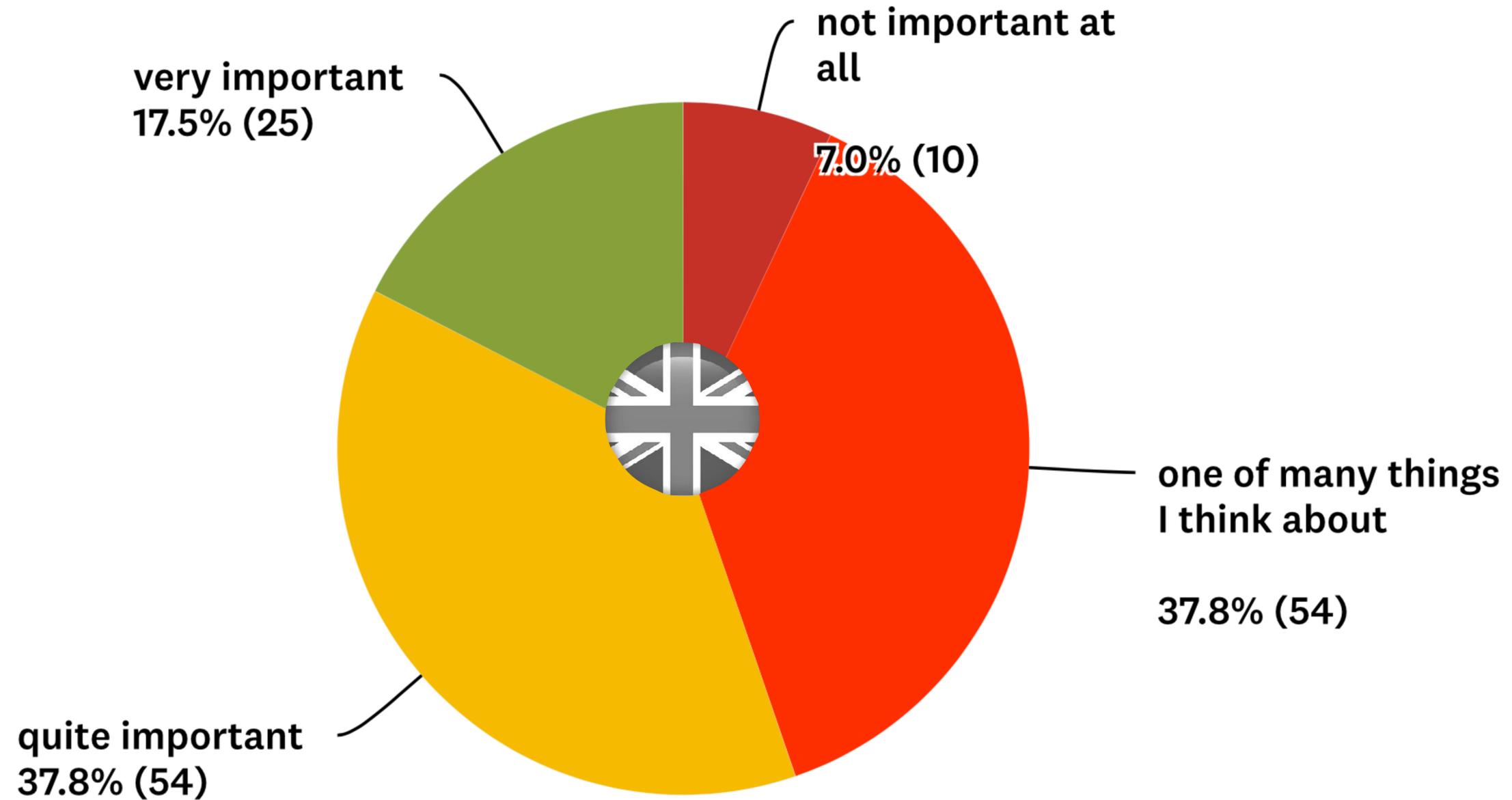
- **41% had no Yorkshire connection**
- **Of the 42 who did have a Yorkshire connection ...**
 - 62% of them had visited Yorkshire
 - 55% had friends in the County
 - 31% have relatives there
 - 26% used to live there
 - 10% were born there.



Provenance was important to 55% of our sample

How important is it where your food comes from?

Answered: 143

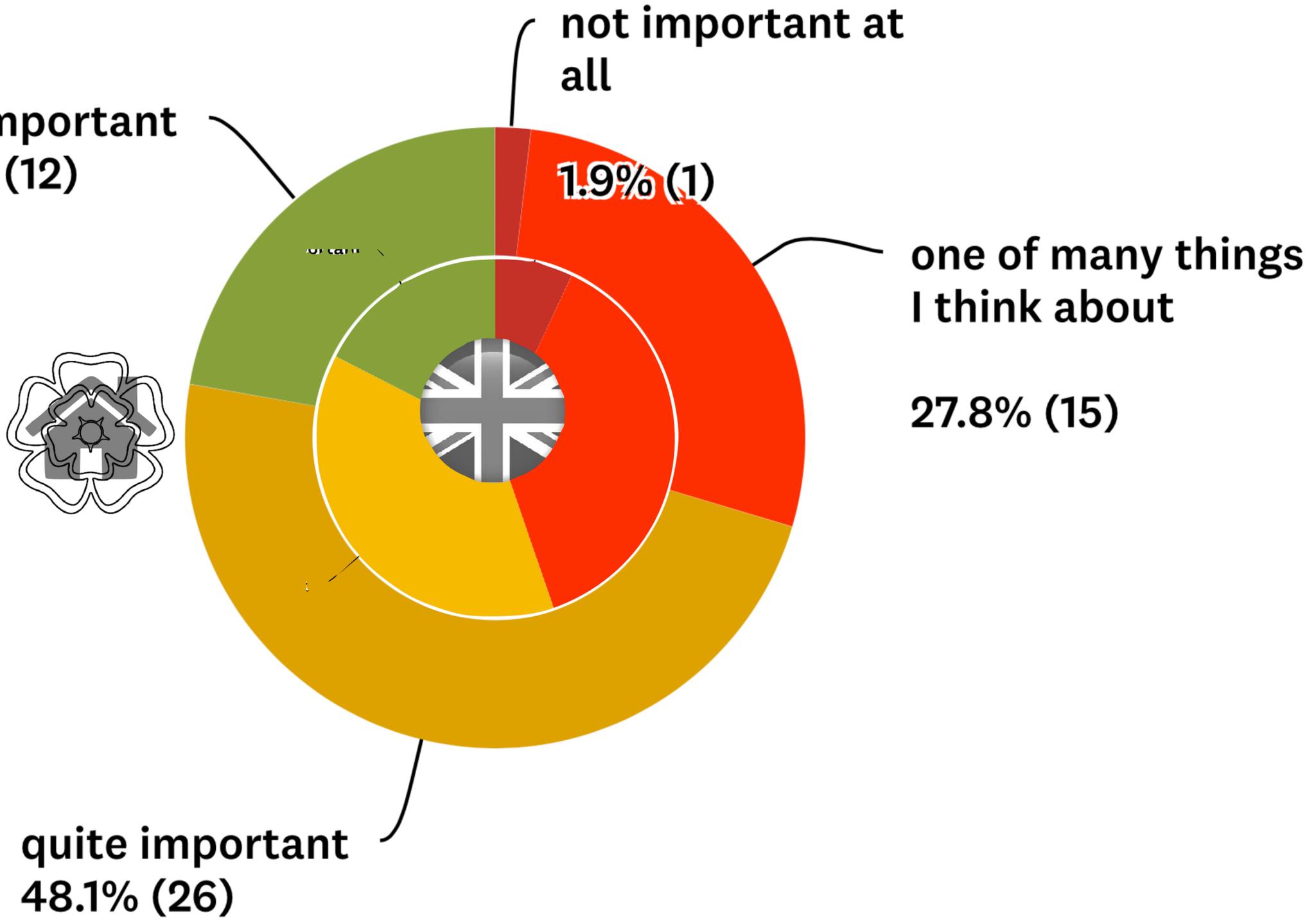


Provenance important to 70.3% of Yorks & Humber residents

How important is it where your food comes from?

Answered: 143 (interior Total) and 54 (exterior - Yorks & Humber Residents)

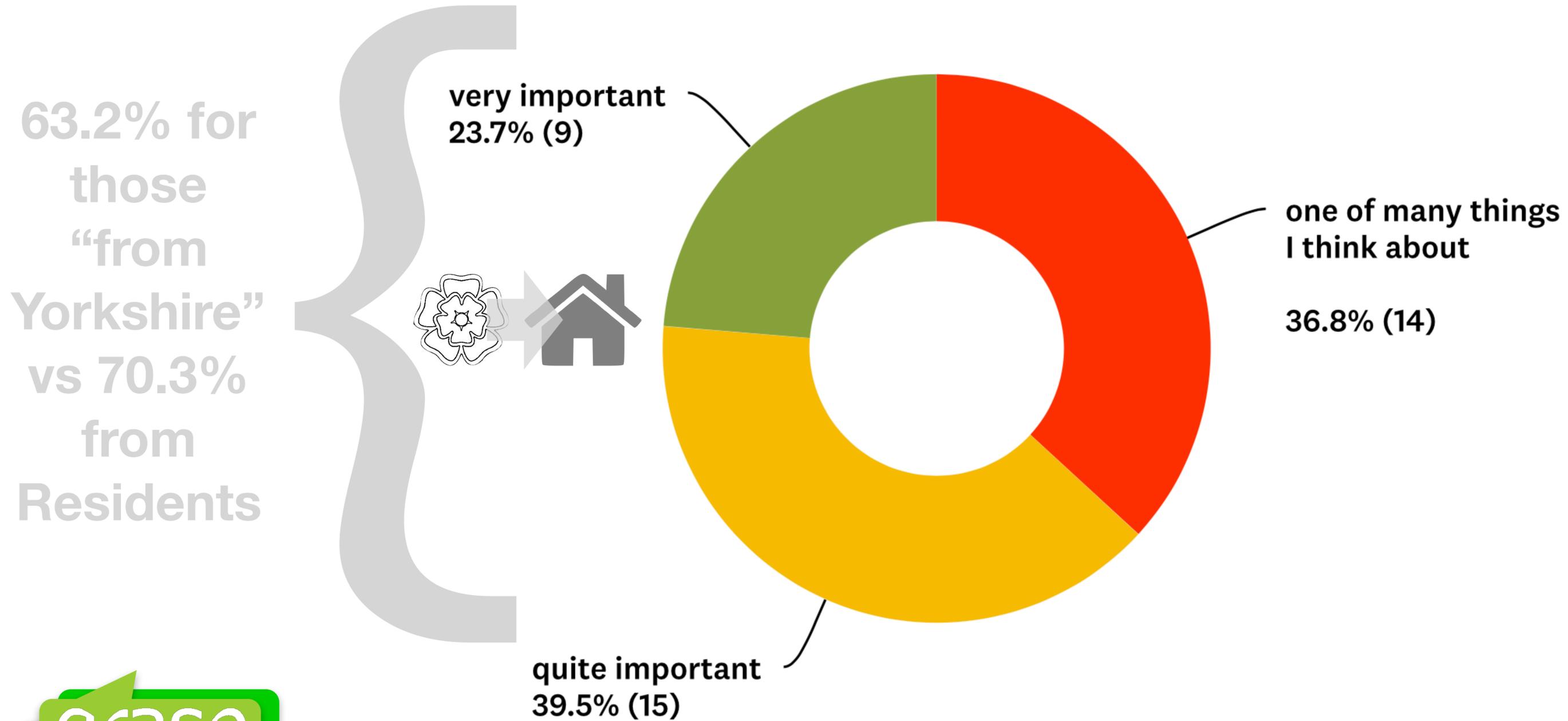
70.3%
“quite” or
“very”
important
for
Residents
... vs 55%
for our total
sample
(interior pie)



Those “from Yorks” are almost as keen on provenance

How important is it where your food comes from?

Answered: 38 (exterior - “from Yorkshire”)

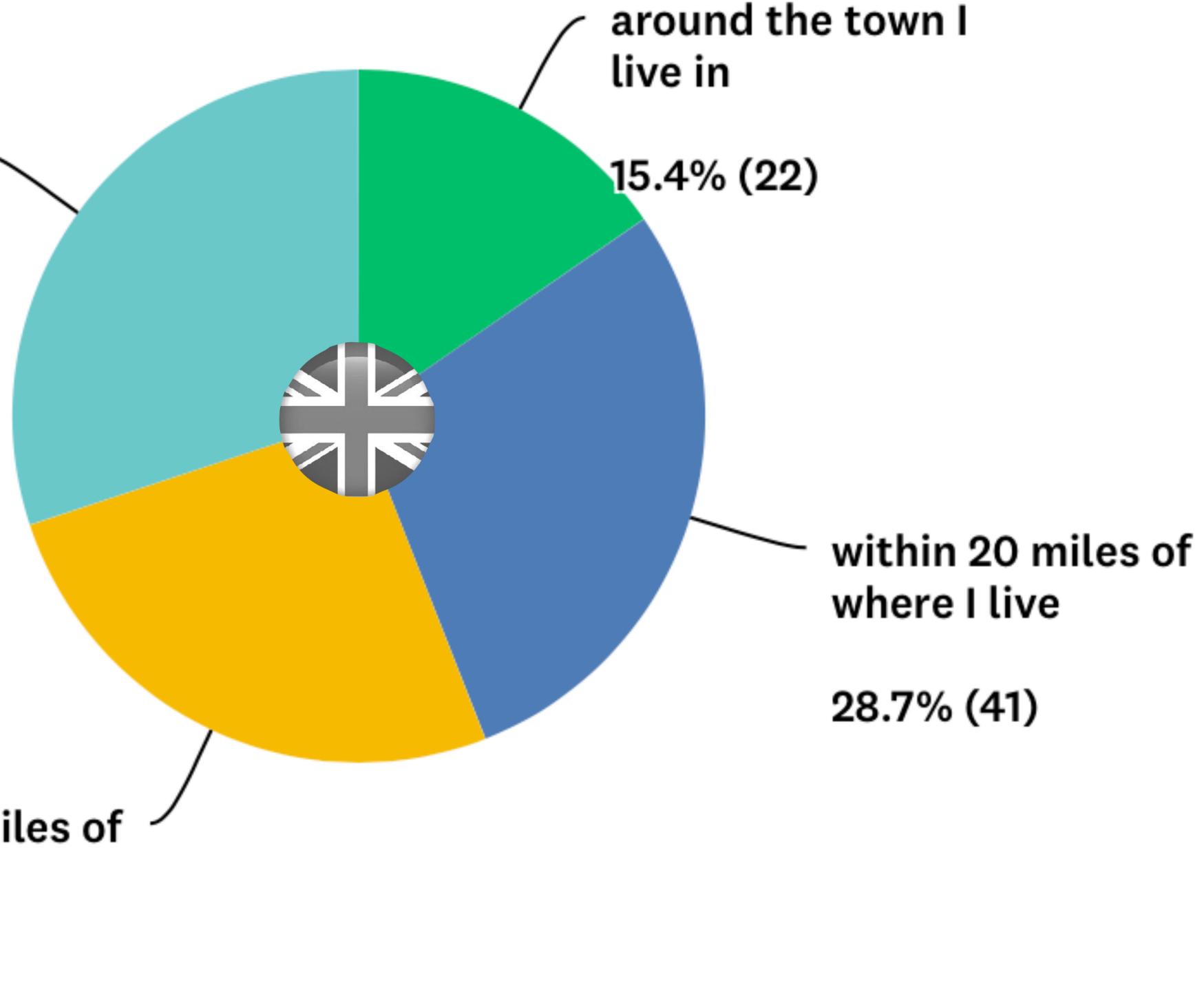


It turns out that “locally-produced” is very subjective ...

Which of these best describes what the term ‘locally-produced’ means to you?

Answered: 143

County wins out for most Britons though ...



Yorkshire & Humber residents tend to opt for 20-40 miles

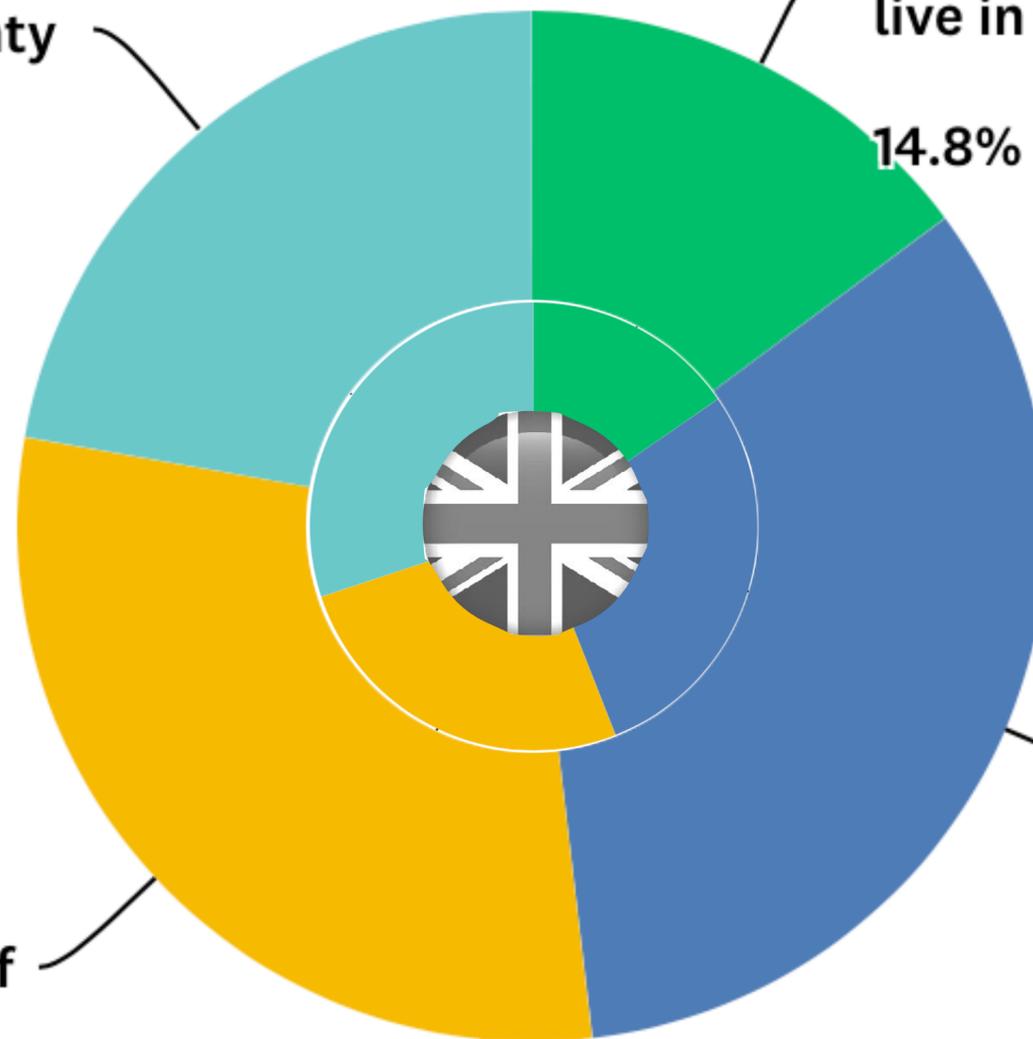
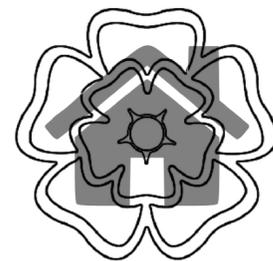
Which of these best describes what the term 'locally-produced' means to you?

Answered: 143 (interior Total) and 54 (exterior - Yorks & Humber Residents)

in the same county
22.2% (12)

around the town I
live in

14.8% (8)



within 20 miles of
where I live

33.3% (18)

within 40 miles of
where I live

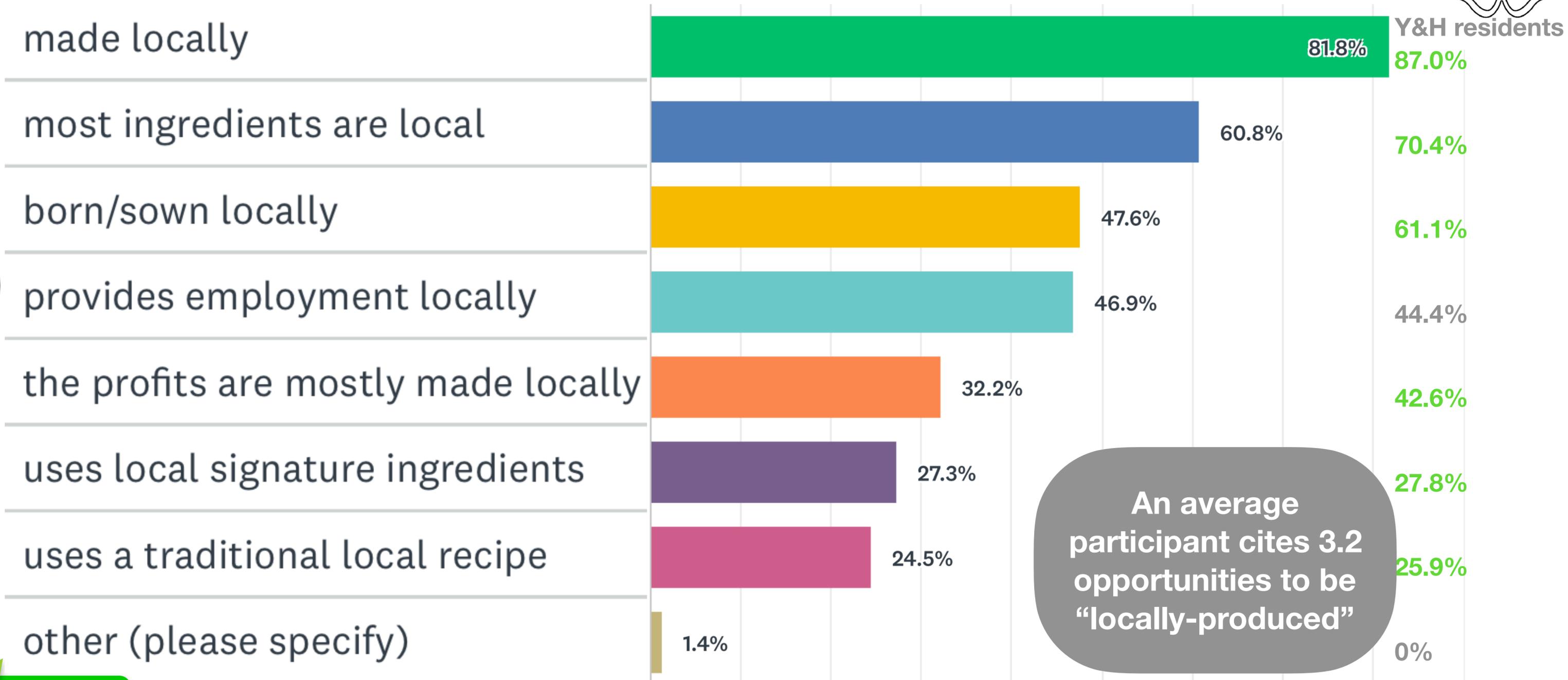
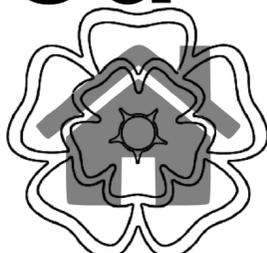
29.6% (16)

With 4,596 square miles of land (11,903 square km) and three of the UK's 10 largest cities there is a lot of County to choose from ...

“Made locally” makes food “locally-produced”

What makes food "locally produced" from your point of view? (Please select all that apply)

Answered: 143



An average participant cites 3.2 opportunities to be “locally-produced”

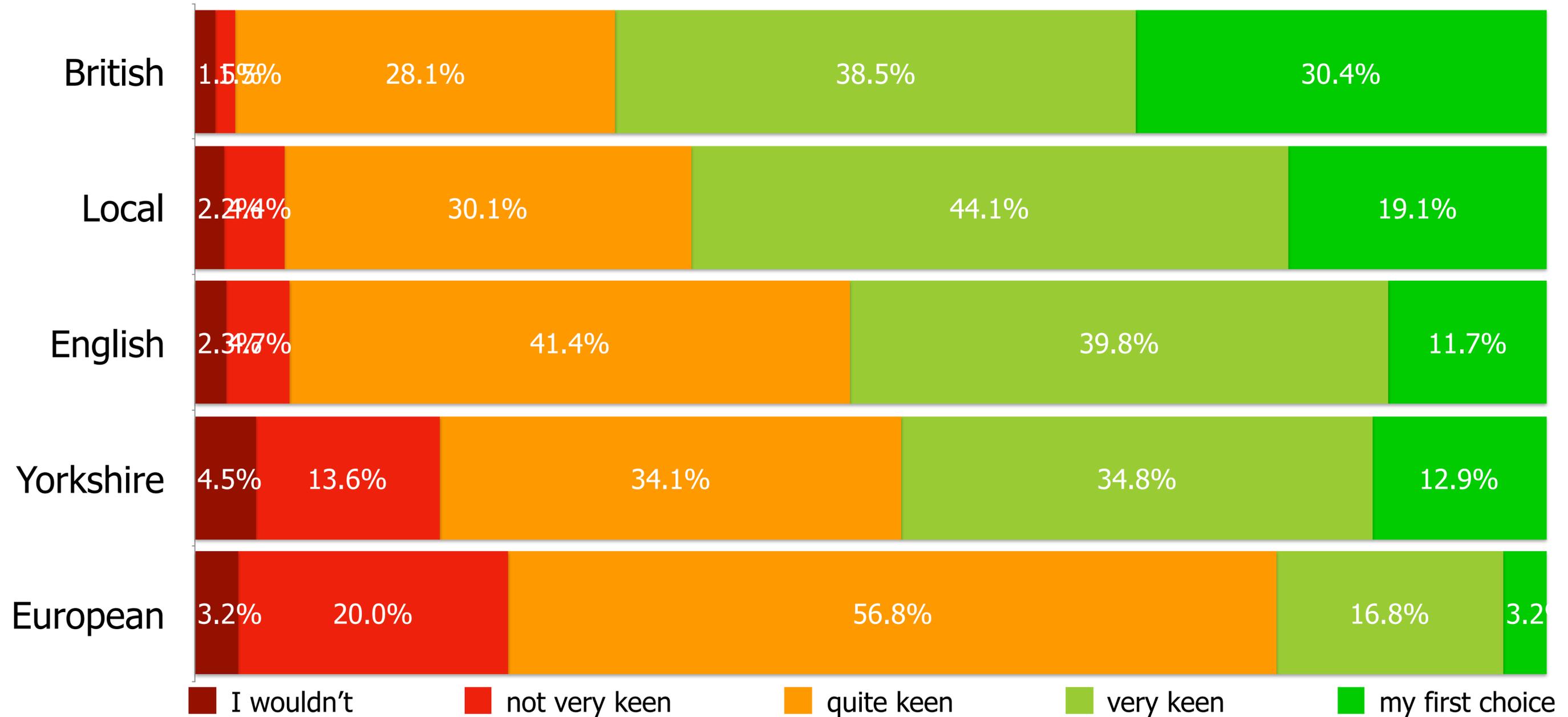


Yorkshire & Humber residents accept (or require!) more criteria for “locally produced”: 3.6

British sample keenest on British ...

When buying food (e.g. cheese/strawberries)
how likely are you to buy the following?

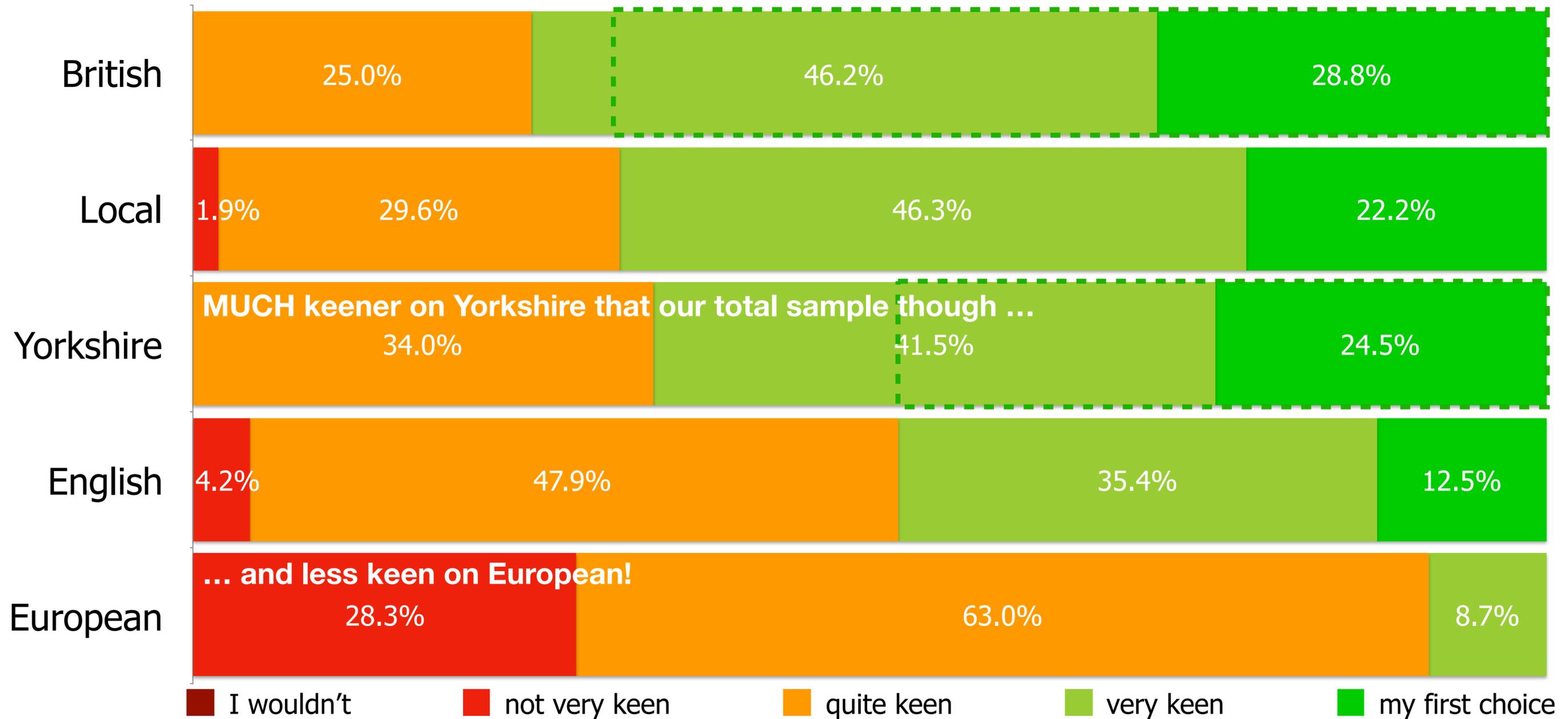
Answered: 143



Yorkshire residents marginally more likely to buy local

When buying food (e.g. cheese/strawberries)
how likely are you to buy the following?

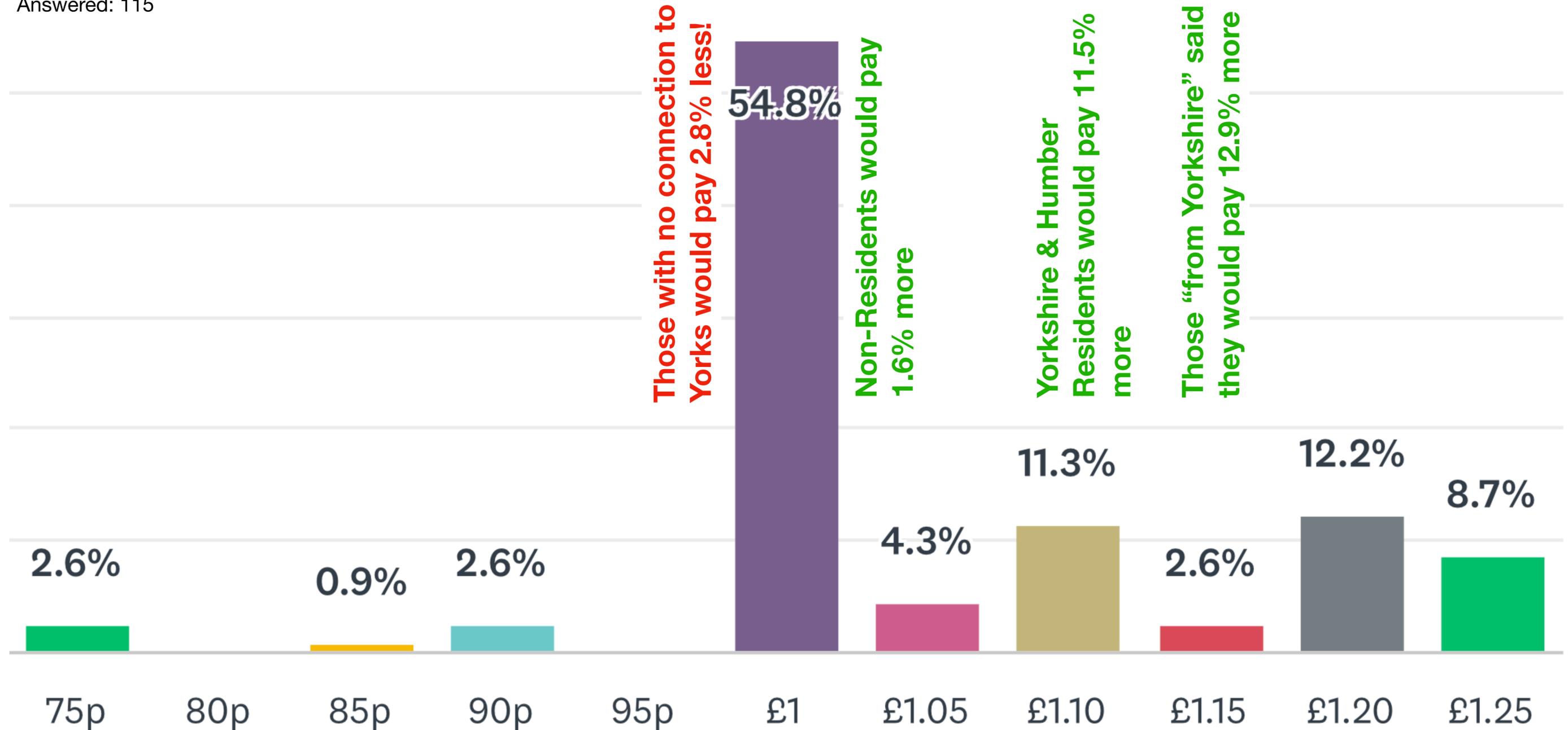
Answered: 143



Av. participant pays 5.4% more for a Yorkshire product

If a British food product was £1, how much would you pay for a Yorkshire food product?

Answered: 115

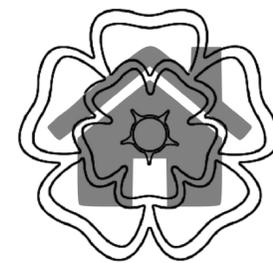


Those with no connection to Yorks would pay 2.8% less!

Non-Residents would pay 1.6% more

Yorkshire & Humber Residents would pay 11.5% more

Those "from Yorkshire" said they would pay 12.9% more



What foods do you associate with Yorkshire?

ale beef beer bettys bread cakes cheese
chips chutneys crab cream curd dairy fat fish fruit
gold grains gravy ham ice lamb liquorice meals meat milk
oil parkin pasties pies pork produce products
pudding quality quorn rapeseed rascals relish
rhubarb root sauce sausages strawberries tarts
tea top veg vegetables wensleydale

What foods do you associate with Yorkshire?

“Tea & Puddings!” “Yorkshire Tea” “...Gold” “Taylors” “Harrogate Water”

“Jacksons Yorkshire Champion Bread” “KitKats”

Roast Dinner Lamb/Mutton Beef Root Vegetables “comfort foods”

Whitby Crab Grimsby Fish York Ham Henderson’s Relish “pickles”

Rhubarb Pontefract Cakes Dock Pudding

Ice Cream Cream Teas Bettys Fat Rascals Curd Tarts Parkin Farrahs

“Cheese like Wensleydale!” “Yorkshire Blue” “Seabrook Crisps” Pies

“Fish & Chips” “Chips & curry sauce”

Beer Ale Tadcaster Beer! Gin.

... and what would make Yorkshire food different?

“An overblown sense of pride” !

“Cheap usually because they are thrifty in Yorkshire”

“less miles to travel” “food miles” “supporting local farmers”

“perceived to be fresher (this is a land of green!)”

“air quality” “heartiness” “plenty of rain”

“no nonsense” “wholesome” “history” “traditional” “bold flavours” “hearty” “the passion of the people behind the food”

“quality” “taste” “for meat: a more distinct and deeper flavour”

“do a few things well, rather than many mediocre”.

What benefits would you expect from Yorkshire food?!

appetizing articial benefits better business cheaper contributing eco
economy employment farmers fashioned flavour food
fresh gets hearty help idea ingredients knowing
local massive methods miles natural nothing passion people potentially
preservatives produce product profit promote provenance
quicker reduce remote responsible smaller support
sustain taste tasty value welfare wholesome yorkshire



What benefits would you expect from Yorkshire food?!

“nothing other than knowing that I'm contributing to local economy”

“benefits the local community” “supporting smaller businesses”

“helps sustain remote villages” “promotes the area”

“Tasty, a good hearty/robust flavour”

“Home cooked authentic taste” “artisanal”

“Responsible packaging, produced with local ingredients, quality flavour”

“reducing food miles” “gets to shelf quicker” (Yorkshire residents!)

“High welfare” “innovative” “health” “wholesome” “natural ingredients”

“Free from artificial colourings and preservatives”

“there is a wealth of farmland in all four ridings that appears not be farmed. Yorkshire SHOULD be able to produce massive amounts of high quality food. I'm not aware that it does.” (Londoner)

What could Yorkshire producers do better ...

“Nothing - I don’t believe Yorkshire is ‘special’!”

“Responsible packaging/ evidence of efforts to reduce environmental impact”

“Promote ecological reasons” “Be organic and say so” “Better animal husbandry”

“Better quality, good ethics, good staff support and pay”

“Tell me about it!” “State more clearly where it comes from” “Clear labelling”

“Social media” “Give the picture of where it comes from and the quality and story behind it” “highlight how they are involved in the local community and the ingredients are sourced locally etc” “makers story” “Samples” “Sell it to me direct”

“Sell at fodder” (Farm shop in Yorkshire!) “Distribute it UK-wide” “Morrisons”

“More collaborative working, educate and proactively network to everyone.”

“Look to make products we eat but cannot currently get made in Yorkshire.

Could we be a self sufficient county!?” “Make it different”

“More vegetarian foods” “Vegan.”

What have we learnt?

- **55% of British residents surveyed think where their food comes from is very/quite important.** Yorkshire Residents and those “from Yorkshire” attach greater importance to the provenance of their food generally (70% and 63% respectively).
- **Yorkshire residents tend to define “locally-produced” as within a 40 mile radius,** a territory smaller than the County. **“Local” remains a bigger motivator for most than “Yorkshire” does ...** bear in mind that the County is subdivided into North, East, South & West and has a number of different Councils that cut further across these divisions!
- **Yorkshire residents say they will pay 12% more for a Yorkshire food product,** those “from Yorkshire” will pay 13% more!
- **Many Yorkshire residents, those “from Yorkshire” and those with connections can name plenty of Yorkshire delicacies.** Some participants - though - had no connections, were unsure where the County is, or were unable to name any food & drink that the County is associated with ...

What should we do?

- **For those “from Yorkshire” or resident in the County “Yorkshire Food” can command a premium between 11&13%.** It is harder for Yorkshire to mean something to those who do not have a direct connection to the County. *Driving new connections to the County can only help widen appeal: the visibility of Yorkshire on products from the County, ensuring distribution of Yorkshire products and delivering disruptive Yorkshire experiences (e.g. London pop-ups / inbound tourism / celebrating icons like forced rhubarb nationwide).*
- **Within Yorkshire, the scale of the County tends to mean local is below a 40 mile radius.** Whilst this complicates a “Yorkshire” proposition, *a tiered approach can help unlock the richness of the County’s offering: from Yorkshire Ale, via Real Yorkshire Wensleydale, to Pontefract Cakes.*
- **Yorkshire Pudding is the County’s standard-bearer!** This has been recently evidenced by social media reactions to the Yorkshire Pudding Wrap ... *the County can integrate other Yorkshire icons more closely with Yorkshire Puddings. Cheese (esp. Wensleydale) is also a major connection: Yorkshire can also make more of its’ cheese, rhubarb, meat & beer!*



THE YORK ROAST





Robin Norton
Principal Director



grasp business development ltd
The Corner House, Harlow Oval,
Harrogate HG2 0DR
United Kingdom

robin@grasp.org.uk
www.grasp.org.uk
@robinatgrasp
+44 794 112 9025

