

Consumer views of potential regulatory divergence in the meat sector

Maes o ddiddordeb ymchwil: [Research projects](#)

Cwblhau arfaethedig: 1 Awst 2022

Statws y prosiect: Wedi'i gwblhau

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Results available: Results available

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About this research

- The FSA commissioned Ipsos UK to conduct qualitative research with the public to help them capture consumer views towards possible divergence.
- This report summarises the findings from qualitative research conducted with 76 participants from England, Wales and Northern Ireland, who took part in 14 online focus groups between the 19th of July and the 9th of August 2022. Each focus group lasted two hours.
- Our methodology was designed to capture public views towards the high-level proposals of regulatory divergence, highlighting areas of support and concern.

Understanding of the FSA

- Consumer awareness of the FSA was generally high, with participants recognising the FSA's role in ensuring food is safe to eat and hygiene standards are maintained, as well as mentions of animal welfare.
- There was less familiarity with precisely how regulations were enforced. For example, there were questions about how the FSA interacts with other government agencies and local authorities.

- There was also low awareness around the FSA's connection to healthy and sustainable food.
- Participants were supportive of this new role despite it seeming distinct and separate from the FSA's remit to ensure the safety and quality of food.
- Participants had not considered the scale of the Official Controls process and were surprised at the overall scale of the meat industry in the UK. The continuous presence of Official Veterinarians and Meat Hygiene Inspectors was reassuring and led to some initial resistance towards any potential changes that regulatory divergence might bring.
- It was argued that the FSA should tell the public more about their role and responsibilities and the extent of current regulations.

Views towards the concept of regulatory divergence

- Participants initially struggled to understand the need for regulatory divergence and what form it could take. This was especially true when it came to food safety. Participants tended to assume that food would either be 'safe' or 'not safe'.
- Trust in the FSA was very high and was reflected by participants' beliefs that food would continue to be safe regardless of the regulatory framework in place.
- Despite spontaneous resistance, there was greater support for divergence if it avoided complications for businesses or helped to reduce administration or save costs.
- Generally, participants did not believe that regulatory divergence would have a significant impact on them as individuals. There was indifference towards two products appearing for sale that followed two sets of regulations. Concerns arose when participants felt the impact of divergence could lead to negative changes in the quality of meat products.
- Attitudes towards regulatory divergence were influenced by three key factors:
 - The scale of the change and whether it was perceived as significant or more 'cosmetic'.
 - Significant changes included those which could have a detrimental impact on animal welfare.
 - Perceptions of whether an erosion of standards could increase the risks of food becoming unsafe.
 - The perceived motivations behind divergence including if changes were being driven purely by a desire to reduce costs.
- Participants did not understand why there would be a need or desire for regulations to be different between the UK nations and argued that having a consistent regulatory regime would be less confusing for consumers, food businesses and for the FSA itself.

Regulatory divergence in practice

- Consumers believed they had the right to know about any changes in regulations and wanted the public to be made aware that regulatory divergence was taking place, for example, through a communications campaign.
- Once informed, participants felt individuals were personally responsible for understanding the effect of divergence and how this could impact them on a daily basis.
- There was less demand for information about specific details of regulatory changes, but signposting to the FSA website could help to streamline this process for consumers who wanted to know more without putting too much information on labels.
- Changing packaging to distinguish between products was felt to be an easy way for consumers to understand regulatory differences when shopping. This could include: sticker systems, traffic light systems, or QR codes that would be able to provide further detail if required. Clear packaging was seen as important to help consumers make an informed choice about what to buy.

- Where changes were perceived as leading to a reduction in standards, participants felt more strongly about the need to be informed. They felt that any divergence that led to a reduction in standards could lead to lower levels of overall trust in the FSA.

How to read this report

This report provides a summary of the insights from the Food Standards Agency's (FSA's) Consumer Panels conducted during July and August 2022. Our findings have been organised in the following structure:

- In Chapter 1 we summarise the background and methodology of the study.
- In Chapter 2 we present participants' understanding of the FSA across the food journey and their role as regulators. We also summarise participants' reflections on the current Official Controls process.
- In Chapter 3 we detail participants' views towards the concept of regulatory divergence, including potential benefits and risks to consumers and businesses. We also detail their specific concerns related to food safety and animal welfare, as well as views on regulatory divergence between the EU and UK and between nations within the UK.
- Finally, in Chapter 4 we summarise participants' attitudes towards potential regulatory divergence in practice, detailing how consumers should be informed, the importance of consumer choice and views on packaging and labelling.

Note on the language used throughout the report

Throughout this report we have referred to "participants" as the individuals that have taken part in our research. We have also used several abbreviations reflecting the topic of discussion:

- AI – Artificial Intelligence
- Defra – Department for Environment, Food and Rural Affairs
- EU – European Union
- FSA – The Food Standards Agency
- MHI – Meat Hygiene Inspector
- OV – Official Veterinarian

Anonymised verbatim quotes have been used to help illustrate key findings, but these quotes do not necessarily summarise the views of all participants that we spoke to.

Limitations to the research

While every attempt has been made to recruit a varied sample of participants and design a robust methodology, possible limitations to the research include:

- **The research topic.** Talking about food regulation, including the processes involved in the meat industry, is not something participants would normally discuss. The focus groups explored complex regulatory structures and exposed participants to new information they were not aware of. To support meaningful discussions, participants were presented with simplified versions of the Official Controls process, and stimulus materials designed to provide them with the information they needed to engage in the topic. They were given the opportunity to ask questions. However, it is possible that participants' attitudes reflect misunderstandings about the processes involved and it is important to note that participants are not experts in food regulations. For example, participants often focused on quality standards rather than food safety regulations.
- **Generalisability.** The findings summarised reflect the self-reported views shared by the participants. Qualitative research is designed to be exploratory and provide insight into people's perceptions, feelings and behaviours. The findings are therefore not intended to

be representative of the views of all people who may share similar characteristics.



Consumer views of potential regulatory divergence in the meat sector: Introduction

Background

The FSA is committed to protecting consumers and ensuring food is safe and is what it says it is. In the meat sector, food businesses are responsible for making sure food is safe and meets required standards, and the role of the FSA is to provide assurance and support to make sure those standards are met through the delivery of Official Controls, ensuring consumer protection and food safety remain a top priority.

The FSA commissioned Ipsos UK to conduct qualitative research to explore and capture consumer views on the impact of potential divergence of a new model in England and Wales from the inherited EU regulation. The findings of this research will be used to feed into a paper produced for the FSA Board and Business Committee. The main objectives of this research were to:

- Uncover whether consumers have any concerns about regulatory divergence or recognise any potential threats to food safety and/or animal welfare.
- Discover potential benefits or opportunities in implementing regulatory divergence.
- Understand the extent to which consumers are concerned about products meeting different productions standards being available for sale under regulatory divergence.
- Establish what assurances or limits would be required for regulatory divergence to be acceptable to consumers.

Methodology

Our approach involved a series of fourteen online focus groups conducted between the 19th of July and the 9th of August, each lasting two hours. Focus groups were used rather than workshops because of the associated benefits of bringing together more homogenous groups for discussion given the potential sensitivities of the topic. The first two focus groups acted as a pilot to allow for refinement and development of the discussion guide structure and stimulus materials, based on participants' responses during these initial sessions.

Sample

We recruited 84 members of the public from England, Wales and Northern Ireland, with a total of 76 participants attending the focus groups. Table 1 provides further details about the sessions. More information on the final sample breakdown is provided Appendix 1.

Table 1: Focus group schedule and total number of participants

Date	Region	Area lived in	EU Referendum Vote/Political Leaning	Total no. of participants
19 July 2022	England	Rural	Leave	6
19 July 2022	England	Rural	Leave	6
21 July 2022	England	Urban/Semi-Urban	Remain	6
21 July 2022	England	Urban/Semi-Urban	Remain	6
25 July 2022	England	Rural	Remain	6
25 July 2022	England	Urban/Semi-Urban	Neither Leave nor Remain	5
26 July 2022	England	Urban/Semi-Urban	Leave	6
26 July 2022	Wales	Urban/Semi-Urban	Remain	5
27 July 2022	Wales	Urban/Semi-Urban	Leave	4
27 July 2022	Wales	Rural	Leave	5
28 July 2022	Northern Ireland	N/A	Unionist	5
28 July 2022	Northern Ireland	N/A	Nationalist	5
01 August 2022	Northern Ireland	N/A	Neither Union or Nationalist	6
08 August 2022	Wales	Rural	Remain	5

Quotas were set on region of the UK. For those in England and Wales, there were quotas on the type of area lived in, how the participant voted in the EU referendum and on how positive or negative they feel towards the Brexit transition now. In Northern Ireland, groups were split by political affiliation as attitudes to Brexit are closely aligned with whether participants identify as Nationalist or Unionist. There were additional quotas on age, gender, ethnicity, socio-economic group, and number of children in the household. There were a mix of regular meat eaters, occasional buyers and vegetarians.

Session design

The first half of the focus groups explored awareness of the FSA and their role as a regulator. Participants discussed their current meat purchasing habits, after which we discussed the food journey and the current Official Controls process. We then introduced the concept of regulatory divergence and shared a definition of what regulatory divergence might look like in the UK.

The second half of the group discussions explored a number of possible examples of what future regulatory divergence could look like in practice. The first example discussed differently regulated products appearing together for sale; the second example described a change in water temperature used to disinfect meat handling tools and the third example described the potential greater use of AI or plant staff monitoring animal welfare instead of Official Veterinarians (OVs). Presenting the examples to each group allowed participants to explore the potential benefits and challenges of regulatory divergence within specific hypothetical scenarios. The sessions concluded with participants voicing their priorities and final reflections for the FSA.

Our proposed methodology reflected the low levels of consumer awareness about the Official Controls process and food regulation in general. Discussions focused on the meat industry as the largest sector covered by the FSA's Official Controls. The design was aimed at capturing public views towards the high-level proposals of regulatory divergence, highlighting areas of support and concern.

Consumer views of potential regulatory divergence in the meat sector: Understanding of the FSA

Participants had a general awareness of the FSA but queried more specific aspects of their work.

Across discussions, consumer awareness of the FSA was generally high, with most participants aware of the FSA as a government organisation and demonstrating an overall understanding of its remit. There was a recognition of the FSA's role in ensuring food is safe to eat and hygiene standards are maintained, as well as mentions of animal welfare. Participants believed the FSA checked processes throughout the production, distribution, and sale of food, although there was not often a clear understanding of this journey.

I imagine they are present from the beginning to the packaging and sale of food, to the end of the line, the cooking and distribution of it.

Northern Ireland, Unionist

There was a widespread belief that FSA standards and regulations are enforced at any location that prepares and sells food. For example, through routine testing, inspections, hygiene ratings and labelling such as best before dates on packaging. Participants also suggested the FSA would play a role in ensuring animals were treated and slaughtered humanely. For one participant, knowledge of this was aided by a connection to someone who worked in the industry. Another participant felt the FSA's work was particularly important for religious groups, who needed to trust that how their food is produced adheres to their beliefs.

[It's important for] different religious groups who don't eat for example pork or different animals, to [not] end up having something that isn't what they thought it was.
England, Urban/Semi-Urban, Neither Leave nor Remain

There was greater confusion about how the FSA enforced regulations.

Participants questioned how the FSA interacted with other government agencies and local authorities in applying regulations in practice. There was uncertainty about the FSA's role in hygiene ratings and how this interacted with council responsibilities. Participants were also unsure whether the FSA could apply penalties as part of their work and how much power they had over enforcement. There was some concern the FSA would not be able to inspect the number of businesses involved in producing food.

I'm not sure how much power they have, how physically they get involved in making things happen. My understanding is that they're not really enforcers.
Rural, leave

In some cases, participants discussed the FSA's responsibilities for communication. There was a suggestion that the FSA was responsible for communicating any changes to legislation. One participant queried whether the UK leaving the EU would have an impact on the FSA's remit.

I'm intrigued now post-Brexit who they are answerable to. Who's policing them? We never seem to get any public debate on their rules and what's permitted. It concerns me that we don't seem to have a public debate about it really.

England, Urban/Semi-Urban, Remain

There was less awareness of the FSA's connection to healthy and sustainable food.

Participants were not surprised by the description of the FSA as “an independent government department working to protect public health and committed to protecting consumers by ensuring food is safe and is what it says it is”. This matched participants' expectations, with a suggestion that the FSA's role was often taken for granted. Participants felt this demonstrated an inherent trust around the governance of food production within the UK.

We probably take it for granted and assume it's going on in the background but haven't given it a lot of thought.

England, Urban/Semi-Urban, Neither Leave nor Remain

In contrast, participants were less aware of the FSA's involvement in ensuring food is healthy and sustainable for the future, a new pillar of the [FSA's 2022-2027 Strategy](#). Participants noted they thought the FSA's focus was around ensuring the safety and quality of food, with standardised procedures to inspect this. In contrast, sustainability seemed distinct from this remit, although participants were supportive of this new role.

I'm impressed that they are here to make sure [food is] healthy and more sustainable. It's nice [the FSA] doesn't just stop to check the food is of high quality.

England, Urban/Semi-Urban, Leave

Participants from Northern Ireland questioned why Scotland is not covered under the FSA's remit. Questions were also raised about the crossover between the FSA and other government bodies like Defra, specifically in relation to goals around sustainability. These discussions were not seen as widely in the English and Welsh groups.

There was an acceptance that meat and vegetables would be regulated differently.

Participants believed that meat would be more closely monitored for diseases, and vegetables for pesticides, with a greater focus on the storage and transportation of meat given concerns about cross contamination. This resulted in a view that meat needed to be more stringently regulated compared to vegetables. This was due to the health risks being higher if something were to go wrong.

Probably the meat industry is the place it needs to have the highest standard as we need to make sure the things we are eating aren't contaminated like mad cow disease. I suppose the [FSA] should be looking into that.

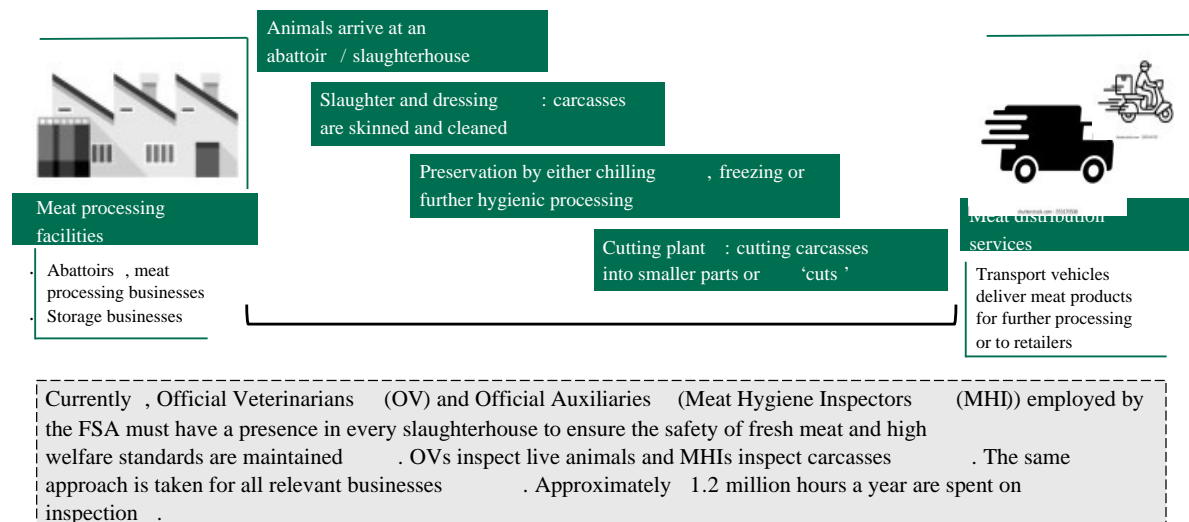
Wales, Urban/Semi-Urban, Leave

Participants had not considered the scale of the Official Controls process.

Figure 1: Stimulus shown to participants introducing the Official Controls process

The current official controls process

Every year, 2.6 million cattle, 10 million pigs, 14 million sheep and lambs and 950 million birds are slaughtered in the UK.



Participants had not thought about the extent to which the FSA is actively involved in the Official Controls process. Although some of the information presented felt unfamiliar, there was a recognition that the procedures sounded appropriate and to be expected. However, participants were surprised at the sheer scale of the meat industry in the UK, both in terms of the number of animals slaughtered and the hours spent on inspection each year.

950 million birds, oh my gosh. I didn't know that much about it. I knew there was a standard and I trust in it to be done. For me, it's just seeing the meat in its packet at the shops.

England, Urban/Semi-Urban, Remain

The continuous presence of Official Veterinarians was reassuring.

Participants were largely unaware of the continuous presence of Official Veterinarians (OVs) and Meat Hygiene Inspectors (MHIs) at abattoirs, suggesting they believed businesses would be spot-checked by the FSA instead. This provided participants with reassurance that inspections were more stringent than previously believed. They supported the presence of OVs and MHIs to ensure consistency in the processes being followed and that standards would not fall at any time.

It's quite reassuring that I know what I'm feeding my kids is good quality.

England, Rural, Remain

In some cases, participants argued that the FSA should tell the public more about their role and responsibilities across the Official Controls process. They suggested the FSA's work appeared broad and detailed, but that participants had very little understanding of the extent of the regulations in place.

I think what they are doing is quite important, so I think it should be more advertised. It seems they are doing a good job and they are doing this much and spending so long, and we don't know anything about it.

Wales, Urban/Semi-Urban, Leave

There was resistance to changes to the Official Controls.

As a result of learning the processes in place for regulating meat were higher than expected, participants felt something could be lost when suggestions were made about future changes. This

may reflect an anchoring bias, where the first information one learns about a subject is then used as a strong 'anchor' for subsequent decision making, even when new information is introduced. [\(footnote 1\)](#) In some cases, participants acknowledged this. They suggested other consumers would be in the position they were before taking part in the focus group, and so changes made to regulations may be less concerning to the general public.

1. Furnham, A., and Chu Boo, H. (2011) A literature review of the anchoring effect, The Journal of Socio-Economics, Vol 40, pp. 35-42



Consumer views of potential regulatory divergence in the meat sector: Regulatory divergence in practice

Participants wanted to be informed about the existence of regulatory divergence.

Generally, consumers believed they had the right to know about any changes in regulations and wanted the public to be made aware that regulatory divergence was taking place. This was linked to their feelings about the importance of consumer choice and being able to decide exactly what they purchased. Participants argued that if divergence were to proceed, consumers should have both awareness of what was changing and an active role in deciding what regulations are acceptable. They felt there was a risk that consumer trust in the FSA could decrease if the FSA was not transparent about any changes.

All the information the consumer has gives them the option to decide what's best for them. Not that we know a lot about the different regulations. You may have to look into that more but at least you have the information.

Northern Ireland, Neither Unionist or Nationalist

There was a recognition that most consumers are unaware of the Official Controls process or the detail of current food regulations, reflecting participants' own limited awareness before the discussion group. This led some participants from apathetic voting groups to argue that it would not be important to inform customers about any changes. These participants did not feel that their choice between two products produced to different regulations on sale together was important, as long as both products were considered safe.

If the change is small, I probably wouldn't even bother looking at it.

England, Urban/Semi-Urban, Neither Leave nor Remain

Participants suggested a communications campaign to tell the public about the changes.

Participants suggested the FSA should develop a communications campaign, mostly through television adverts, to inform consumers that a change to the way their food is regulated would be about to take place. Details of regulatory divergence would not be required, but the campaign could be designed simply to tell the public about the upcoming change.

There were also suggestions of a social media campaign designed for the same reason, not to provide in-depth information about the specifics of regulatory divergence, but to build awareness amongst consumers. It was noted that not everybody has social media, nor watches live television, so the awareness campaign would need to reach the widest audience by being launched across multiple channels. Participants felt these adverts, placed across a variety of media sources, could then signpost the most concerned consumers to the FSA website. There they would be able to read more detailed information about specific changes to regulations and what it would mean for them as a consumer.

This information should be made public, and people should be aware where it's coming from and what the standards are. It shouldn't be hidden but it should be out there for everyone to know.
England, Rural, Leave

Consumers were seen as responsible for researching the detail of how divergence affected specific products.

Once told about the changes, participants felt they would be personally responsible for understanding the effect of regulatory divergence and would have to research it themselves. Signposting to the FSA website would help to streamline this process for consumers. Participants wanted any divergence to be explained in basic terminology and expected the FSA to make any changes to regulations both visible and in the public domain.

It has to be clear on the pack what the regulations are. Then it's up to me to research what those differences might be. The only choice is to do research.
England, Urban/Semi-Urban, Remain

Participants felt the level to which they would want to be informed about specific regulatory changes would depend on the extent of any difference. They felt that smaller changes to regulations that were mostly viewed as cosmetic would have little impact on purchasing habits. This meant participants did not always feel the need to be highly informed of these changes, for example a change in the temperature tools were washed at. As long as food remained safe to eat, groups agreed that their main concerns would be alleviated.

I think most people wouldn't care about small changes. Big changes, people do care about, but small things, I can't imagine how that would affect many people, to know about that.
Wales, Rural, Remain

When changes to regulations were seen as more significant, for example related to perceived changes to animal welfare standards, participants wanted more information to be available about what this would mean for consumers. Across the groups, if regulatory divergence led to a drop in standards, there was agreement that this would impact whether they would continue to buy meat. As such, participants wanted to be able to identify which products followed alternative regulations so they could make an informed decision. While they felt that information should be available on these changes, it should not be done in a way to overwhelm the public.

It's down to what's the change they're making. And if it does make a difference, what the difference would be compared to what it is now. If it's something big, then let us know why they're changing it as well.

Participants argued that packaging should be used to distinguish between products following different regulatory regimes.

Participants generally felt the clearest way to distinguish between products complying with different regulations would be noticeable differences in packaging and labelling. This was felt to be easy for consumers to understand when shopping. They argued it would not be necessary to display items in different sections of supermarkets, but a clear distinction between different products would be essential to keep consumers informed.

I would want some kind of packaging for [knowing the difference]. Whether it's a blue star for EU and a red one for UK, it gives the consumer an at-a-glance way to know what standard is being adhered to.

Northern Ireland, Neither Unionist or Nationalist

The most popular choice mentioned across groups was for a sticker system. This could be through a colour code or a flag system, using the EU or UK flags to highlight which regulatory regime is being followed. There were some concerns this could confuse consumers if meat produced in the UK could have an EU flag on the label as a result of following EU regulations. However, overall participants felt it was more important to be clear what regulations products were adhering to. This reflected the need to provide consumers with choice and help keep them informed of changes in policy.

I think if we can look at the product and see a logo telling us which regulations it's following and there's a breakdown that would give us the information we need to know.

England, Urban/Semi-Urban, Remain

Alternatively, participants described a 'traffic light system', which could inform customers of the level of change, reflecting their distinction between more cosmetic and significant differences. Participants imagined how smaller changes with a green light would symbolise changes of least concern whereas changes labelled as red would highlight to consumers that they may want to look into the regulations before choosing what to purchase. Participants mentioned they currently look for labels such as the Red Tractor symbol, and similar icons or clear systems would help them to make an informed decision on what to buy.

Maybe what they could do is say, 'Here is a red, amber, green scale'. Red is 'our change is going to be completely different' and a green one, something like 'we're going to wash our tools at a different temperature', and we find out about the red ones because it's a drastic change.

England, Rural, Remain

However, there was also a sense that current packaging already contains too much information for consumers to comprehend. Participants described how they are often only looking at the sell-by or best-before date, or the origin of meat, for example whether it is British. They argued that consumers are not always interested in reading detailed information when in a supermarket. Despite this, the consensus was that information should still be on packaging for people who would be interested in finding out more.

There is so much information on a packing, do you need anymore? Do you need another sticker saying it is from the EU or England? I think there is enough.

Wales, Urban/Semi-Urban, Leave

QR codes could provide a further level of detail for those most concerned.

Participants suggested a potential workaround to the extent of information on packaging would be to include a QR code on labels that links to the FSA or meat producers' website. This could provide more detailed information to the shopper about the specific regulations for that individual product. Participants felt that using QR codes would balance the requirements of those who just want to buy meat, regardless of the regulation, and those who wanted to be more informed.

If it had a QR code on each package and we had the regulations of each one and it came up with the comparison thing, that would be a good way.
England, Rural, Remain



Consumer views of potential regulatory divergence in the meat sector: Conclusion

Overall, participants did not believe regulatory divergence would have a significant impact on them as individuals. They widely felt food would remain safe irrespective of whether products followed the same or different regulatory regimes. Although spontaneous reactions resisted the concept of regulatory divergence, participants were more accepting if they felt divergence could reduce the burden on food businesses. There were no clear differences in attitudes across the nations, with political views seeming to have a greater influence on perspectives.

A distinction was drawn between more cosmetic changes, which could have a limited impact on consumers, and more significant changes related to a reduction in quality standards or animal welfare. Participants felt the public would be more concerned about significant changes, often assuming there would be reduction in standards. This was influenced by widespread scepticism that regulatory divergence was being motivated by a need for cost saving.

Although participants were not particularly concerned about regulatory divergence in principle, they argued it was important the FSA informed the public about the proposed changes to the regulatory framework. They emphasised the need for transparency, suggesting a communications campaign to inform people about the existence of regulatory divergence. However, participants felt it would be down to individuals to research the specific details of any changes related to particular products.

Participants did not see a problem with shops selling products following different regulations on the same shelf. However, they wanted clear labels on packaging so consumers could tell which regulations a product complied with. This could follow a traffic light system, related to the significance of a change, or include a QR code to signpost to wider information. Clear labelling was seen as important so that consumers could make an informed choice about what to buy.



Consumer views of potential regulatory divergence in the meat sector: Appendix 1

Table 3: Summary of achieved participant numbers by key quotas in the England participant sample

Gender	Area Live in	EU Referendum Vote	Age	Ethnicity	Working Status	Dietary Requirements	Cooking
3 x F 3 x M	6 x Rural	6 x Rural 6 x Leave	0 x 18-24 1 x 25-34 4 x 35-54 0 x 55+	5 x white participants 1 x ethnic minority participants	6 x full-time employment	4 x buy and consume meat regularly 2 x buy and consume meat occasionally	2 x I only prepare food for myself 4 x I prepare food for myself and others
3 x F 3 x M	6 x Rural	6 x Leave	1 x 18-24 1 x 25-34 3 x 35-54 1 x 55+	6 x white participants 0 x ethnic minority participants	6 x full-time employment	3 x buy and consume meat regularly 3 x buy and consume meat occasionally	3 x I only prepare food for myself 3 x I prepare food for myself and others
3 x F 3 x M	2 x Urban 4 x Semi-urban/suburban	6 x Remain	0 x 18-24 1 x 25-34 4 x 35-54 1 x 55+	4 x white participants 2 x ethnic minority participants	4 x full-time employment 1 x part-time employment 1 x retired	4 x buy and consume meat regularly 1 x pescatarian 1 x vegan	3 x I only prepare food for myself 3 x I prepare food for myself and others
3 x F 3 x M	2 x Urban 4 x Semi-urban/suburban	6 x Remain	0 x 18-24 1 x 25-34 4 x 35-54 1 x 55+	2 x white participants 4 x ethnic minority participants	4 x full-time employment 2 x part-time employment	3 x buy and consume meat regularly 3 x buy and consume meat occasionally	4 x I only prepare food for myself 2 x I prepare food for myself and others
3 x F 3 x M	6 x Rural	6 x Remain	0 x 18-24 2 x 25-34 1 x 35-54 3 x 55+	5 x white participants 1 x ethnic minority participants	4 x full-time employment 1 x part-time employment 1 x retired	5 x buy and consume meat regularly 1 x vegetarian	2 x I only prepare food for myself 4 x I prepare food for myself and others
2 x F 3 x M	3 x Urban 2 x Semi-urban/suburban	4 x Prefer not to say 1 x did not vote in the 2016 EU referendum	1 x 18-24 1 x 25-34 1 x 35-54 2 x 55+	3 x white participants 2 x ethnic minority participants	3 x full-time employment 1 x part-time employment 1 x full-time education/studying	2 x buy and consume meat regularly 2 x buy and consume meat occasionally 1 x pescatarian	2 x I only prepare food for myself 3 x I prepare food for myself and others
3 x F 3 x M	4 x Urban 2 x Semi-urban/suburban	6 x Leave	0 x 18-24 2 x 25-34 2 x 35-54 2 x 55+	4 x white participants 2 x ethnic minority participants	5 x full-time employment 1 x look after the home / children	4 x buy and consume meat regularly 2 x buy and consume meat occasionally	3 x I only prepare food for myself 3 x I prepare food for myself and others

Table 3: Summary of achieved participant numbers by key quotas in the Wales participant sample

Gender	Area Live in	EU Referendum Vote	Age	Ethnicity	Working Status	Dietary Requirements	Cooking
3 x F 2 x M	1 x Urban 4 x Semi-urban/suburban	5 x Remain	0 x 18-24 1 x 25-34 3 x 35-54 1 x 55+	3 x white participants 2 x ethnic minority participants	5 x full-time employment	3 x buy and consume meat regularly 1 x buy and consume meat occasionally 1 x vegetarian	2 x I only prepare food for myself 3 x I prepare food for myself and others

Gender	Area Live in	EU Referendum Vote	Age	Ethnicity	Working Status	Dietary Requirements	Cooking
1 x F 3 x M	2 x Urban 2 x Semi-urban/suburban	4 x Leave	0 x 18-24 1 x 25-34 2 x 35-54 1 x 55+	3 x white participants 1 x ethnic minority participants	2 x full-time employment 2 x currently not in paid employment	1 x buy and consume meat regularly 1 x buy and consume meat occasionally 2 x vegetarian	2 x I only prepare food for myself 2 x I prepare food for myself and others
3 x F 2 x M	5 x Rural 5 x Leave		0 x 18-24 1 x 25-34 2 x 35-54 2 x 55+	4 x white participants 1 x ethnic minority participants	2 x full-time employment 1 x part-time employment	1 x currently not in paid employment	2 x buy and consume meat regularly 1 x buy and consume meat occasionally 2 x vegetarian 3 x I only prepare food for myself 2 x I prepare food for myself and others
3 x F 2 x M	5 x Rural	5 x Remain	1 x 18-24 1 x 25-34 1 x 35-54 2 x 55+	5 x white participants	3 x full-time employment 2 x part-time employment	1 x buy and consume meat regularly 3 x buy and consume meat occasionally 1 x vegetarian	3 x I only prepare food for myself 2 x I prepare food for myself and others

Table 4: Summary of achieved participant numbers by key quotas in the Northern Ireland participant sample

Gender	Area Live in	EU Referendum Vote/Political leaning	Age	Ethnicity	Working Status	Dietary Requirements	Cooking
2 x F 3 x M	1 x Rural 1 x Urban 3 x Suburban	(5 x Unionist) 2 x Leave 2016 EU referendum 3 x Remain 2016 EU referendum	0 x 18-24 1 x 25-34 3 x 35-54 1 x 55+	5 x white participants	4 x full-time employment 1 x currently not in paid employment	2 x buy and consume meat regularly 2 x buy and consume meat occasionally 1 x vegan	1 x I only prepare food for myself 4 x I prepare food for myself and others
3 x F 2 x M	2 x Urban 3 x Suburban	(5 x Nationalist) 3 x Remain 2016 EU referendum 2 x did not vote in the 2016 EU referendum	1 x 18-24 1 x 25-34 2 x 35-54 1 x 55+	5 x white participants	3 x full-time employment 1 x part-time employment 1 x look after the home / children	3 x buy and consume meat regularly 2 x buy and consume meat occasionally	3 x I only prepare food for myself 2 x I prepare food for myself and others
3 x F 3 x M	2 x Rural 3 x Urban 1 x Suburban	(5 x Neither Nationalist nor Unionist) 4 x Remain 2016 EU referendum 2 x did not vote in the 2016 EU referendum	0 x 18-24 2 x 25-34 2 x 35-54 2 x 55+	6 x white participants	4 x full-time employment 1 x currently not in paid employment 1 x look after the home / children	5 x buy and consume meat regularly 1 x buy and consume meat occasionally	3 x I only prepare food for myself 3 x I prepare food for myself and others



Consumer views of potential regulatory divergence in the meat sector: Appendix 2

Focus group discussion guide

Key:

- | Section | Timings | Questions and exercises | Objectives covered |
|---|------------|---|--|
| Arrival (before start) | 15-20 mins | Participants enter the 'zoom room' and any that have not already done so are asked to change their screen name to first name and initial of their surname and check their microphone and video are working | - |
| Section 1:
Introductions and warm-up | 5 mins | <p>SHOW STIMULUS: SLIDES 1-5</p> <p>Introduction:</p> <ul style="list-style-type: none"> • Thank participants for taking part. • Introduce self and Ipsos, any observers, tech support and note-takers. • The discussion will last two hours and we'll have a short break part way through. <p>Explain purpose of the discussion: This research is being carried out on behalf of the Food Standards Agency. The FSA are looking at the way the food industry currently regulated and thinking about ways in which this could change in the future. They have asked us to run this research as they are interested in gaining a better understanding of public views on proposed changes to the meat industry.</p> <ul style="list-style-type: none"> • talk through the ground rules/ housekeeping [SLIDES 3 and 4] • we will be audio-recording this discussion in line with the MRS Code of Conduct. The recording will be stored on our secure servers and no one outside of the research team will have access to this. • following these groups, we will be writing up our findings into a report for the FSA, and these will be published. However, no findings will be attributed to you, and we will not include your name in any reports. • any questions? • can I check you are all happy to take part in this research? • check if participants are happy for the discussion to be audio-recorded in line with the MRS Code of Conduct and that all recordings will be saved securely and securely deleted following the completion of the research project. | <ul style="list-style-type: none"> • introduce participants to the research • introduce moderators, observers and note-takers • clarify audio recording • collect informed consent for participation |
| | 6:05 | <p>Ask if everyone is happy for the recording to begin TURN ON RECORDING and record consent that everyone is happy to participate in the workshop, that they understand the aims of the research, that their participation is voluntary and that their responses will remain confidential and anonymous.</p> <p>WHEN INTRODUCING OBSERVERS, PLEASE SPECIFY: We're also joined tonight by observers from the Food Standards Agency, but please rest assured they don't have any other information about you, other than what can be seen on the screen.</p> | |

Section	Timings	Questions and exercises	Objectives covered
Section 2. Introductions and gaining level of awareness of the FSA	15 mins -6:20	<p>SHOW STIMULUS: SLIDE 5 Introductions around the group. Please tell us:</p> <ul style="list-style-type: none"> • your first name • where you're from • what's your favourite meal to eat, or cook at the moment <p>We want to start by talking a bit about the Food Standards Agency and what you think it is that they do/what they are responsible for. As a reminder, this is not a test, we are just interested in hearing about your awareness of the FSA.</p> <p>SHOW STIMULUS: SLIDE 6</p> <p>What initially comes to mind when you hear "the Food Standards Agency"? How many of you have heard of this organisation before?</p> <ul style="list-style-type: none"> • what kinds of things do you think the FSA does? • what do you think they are responsible for? • what does this look like in practice? • where do you think they operate/enforce standards (for example, what kind of businesses)? • is there anything else you think the FSA does? <p>Do you think anyone else is responsible for regulating the safety of food? What do you think they do? What do you think happens to make sure the food you buy in the shops is safe to eat?</p> <p>Do you think there are any differences in the way that different foods are regulated? For example, meat versus vegetables?</p> <p>SHOW STIMULUS: SLIDE 7 – Overview of role of the FSA</p> <ul style="list-style-type: none"> • how much of this information is familiar to you? Any surprises? • do you have any questions about the FSA's role? <p>What do you think about the FSA and their role as a regulator, now that you know a little more?</p>	<p>Ice-breaker exercise to get participants to know each other and build discussion dynamic.</p> <p>Gauge awareness levels of regulation in the food industry and the FSA's role in this</p>

Section	Timings	Questions and exercises	Objectives covered
Section 3. Exploring consumers' meat purchasing habits and introducing the food journey and official controls 20 mins	20 mins	<p>Now we'd like to talk about what you consider when you purchase food. How often do you go grocery shopping?</p> <ul style="list-style-type: none"> do you shop for anyone else? For example, family, neighbours do you tend to go to the same or different shops? <p>How often do you tend to buy meat? Moderator to note any vegetarians/vegans in the group and explain we're interested in their views even if they don't tend to buy meat for themselves.</p> <ul style="list-style-type: none"> where do you tend to buy meat from? do you tend to go to the same or different places? For what reasons? who are you buying for? Does this impact your decision making in any way? <p>What do you consider when buying meat? PROBE IF NEEDED: Price, where produced, company producing the meat, retailer, quality marks for example, Red Tractor, whether halal/kosher, anything else Does this differ in any way by the type of meat you are buying?</p> <p>How often will you look at the labels when buying meat? What sorts of things are you looking for?</p> <p>We're now going to move on to another area which is going to form the basis of what we'd like to discuss with you today.</p> <p>As you know the FSA want to understand people's attitudes to potential changes to regulations in the meat industry. Before we go into more detail on this, we'd like to briefly show you what the current food journey of meat products look like.</p> <p>SHOW STIMULUS: SLIDES 8 & 9 - INTRODUCE FOOD JOURNEY AND OFFICIAL CONTROLS</p>	<p>Understand current thinking when purchasing meat products</p> <p>Introduce brief overview of food journey and current official controls</p>
	6:40	<p>MODERATORS TO MAKE CLEAR THAT THE OFFICIAL CONTROLS PROCESS IS NOT THE ONLY PART OF THE FOOD JOURNEY THAT THE FSA ARE INVOLVED IN, BUT IT IS AN AREA THAT WE ARE FOCUSING ON IN THE DISCUSSION TODAY</p> <p>How much of this information feels familiar to you?</p> <ul style="list-style-type: none"> what had you heard about before? From where? is anything surprising to you? is there anything that you find confusing? do you have any questions about any of this information? 	

Section	Timings	Questions and exercises	Objectives covered
<p>Section 3.</p> <p>Introducing the concept of regulatory divergence and exploring examples of this in practice</p>	20 mins-	<p>SHOW SLIDE 10</p> <p>As you may know, the UK left the European Union in January 2020. Following this, the FSA is interested in exploring the potential opportunities the UK now has to change and modernise how food is regulated.</p> <p>This could mean different regulations apply in different parts of the UK. This could be because Northern Ireland will continue to follow EU regulations, while England, Wales and Scotland will follow UK regulation. Or it could be because England, Wales and Scotland do not make the same changes as each other.</p> <p>Currently, most UK regulations are the same as EU regulations. However, this could change in the future if the EU made changes to their regulations, or the UK changes our current regulation. This is known as 'regulatory divergence'. This could mean that some food businesses need to comply with both UK and EU regulations, depending on which market they are producing for, because the requirements are different. This could be expensive for businesses, as it could mean they need to run two production lines to meet different rules for EU exports and supply of the UK market. In this scenario all products in UK shops will all be produced to UK regulations.</p> <p>One alternative is that food businesses could be allowed to choose to comply with either UK or EU regulation for the UK market when these regulations are different. This would mean they could still sell their products in the UK by complying with EU regulations that could be different from those in the UK. In this scenario, two products that appear to be identical in a UK shop could be sold, even though they have been manufactured to different regulations.</p> <p>The FSA wants to explore consumer attitudes towards these potential changes to regulation and what it would mean for food businesses and consumers.</p> <p>What do you think of the information you've just heard? Do you have any questions? Is anything unclear?</p> <p>What do you think about the idea that food businesses could decide which legislation to comply with? Do you think there could be any positives to this? What about downsides?</p> <p>What do you think about the idea that regulations could be different across each of the four nations in the UK? Do you think there could be any positives to this? What about downsides?</p> <p>What do you think this could mean to consumers? Do you have any concerns? How do you think this might affect you? Could it change what you consider when buying meat?</p> <p>INTRODUCE EXAMPLES: We have developed some hypothetical examples of what regulatory divergence could look like in the future, with regards to meat products.</p> <p>SHOW SLIDE 11</p> <p>Example 1. Jameson's, a UK food business, has sold meat to the EU and UK markets for the last fifty years. Following changes to UK regulations in the meat industry, Jameson's decides to continue to produce meat which adheres to EU regulations, rather than produce products which adhere to both regulations. This means that, in some cases, the meat they produce may not comply with the revised UK regulations but can still be sold in the UK. Their meat products are sold across the UK, using the same packaging they've always used. They do not look any different to other meat products being sold in line with the revised UK regulations.</p>	<p>Introducing regulator divergence to participants and gathering initial views on this.</p> <p>Exploring hypothetical example of what proposed changes to regulations could look like in practice</p>

Section	Timings	Questions and exercises	Objectives covered
Break	7:pm 10 mins	SLIDE 12	-

Section	Timings	Questions and exercises	Objectives covered
	7:10-7:40 30min	<p>SHOW SLIDE 13</p> <p>Example 2. Under the new regulations, one of the main areas another food business, Gregory's Meat, makes changes to is their approach to disinfecting tools which are used to prepare meat safely. The water for disinfecting tools must be supplied at no less than 82oC . However, research is commissioned and demonstrates that equivalent results are achieved using water at 72oC. The FSA accepts the research and amends their legislation to permit the lower temperature to be used in England and Wales. Due to regulatory divergence, two steaks could appear next to each other on the shelves, one prepared at a facility disinfecting with water temperatures of 82C and the other at 72C.</p> <p>What do you think about this scenario? Do you have any immediate concerns?</p> <p>What could this mean for:</p> <ul style="list-style-type: none"> • consumers? • food businesses? • retailers? <p>How would you feel about some businesses using water at a lower temperature to disinfect tools, compared to others? What might be the benefits? What concerns do you have?</p> <p>How would you feel about the change in regulations only applying to England and Wales (and not Northern Ireland)? What might be the benefits? What concerns do you have?</p> <p>Would you want this to be communicated to consumers? If so, in what way?</p> <p>Would this affect your decision-making in any way when purchasing meat? Why/why not?</p> <p>To what extent would you trust that food adhering to these revised standards was safe to eat?</p> <p>How would you feel about two meat products that are packaged the same being available for purchase, but they have been prepared on production lines using different water temperatures?</p> <p>SHOW SLIDE 14 Example 3. Currently under retained EU regulations, Official Veterinarians should be physically present at abattoirs at all times to ensure no animal welfare breaches are made.</p> <p>Potential changes in the future could involve a greater use of artificial intelligence to assist with remote welfare monitoring for animals, or training staff within the meat processing plants to report and investigate breaches to animal welfare. This would be instead of Official Veterinarians carrying out inspections of animals to check for any injuries or cause of death.</p> <p>In both of these scenarios, animal welfare standards would remain unchanged, but the staff responsible, or way in which monitoring standards is delivered could be different from the current regulations.</p> <p>What do you think about this scenario? Do you have any immediate concerns?</p> <p>What could this mean for:</p> <ul style="list-style-type: none"> • consumers? • food businesses? • retailers? <p>[FOR MODERATORS IF NEEDED: benefits of this could include freeing up the time of Official Veterinarians to concentrate on higher risk businesses or tasks.]</p> <p>How would you feel about the introduction of more artificial intelligence or technology to ensure welfare standards are monitored and met?</p> <ul style="list-style-type: none"> • what might be the benefits? • what concerns do you have? 	Continuing to explore hypothetical example of what proposed changes to regulations could look like in practice
	7.25		

Section	Timings	Questions and exercises	Objectives covered
Wrapping up and reflections	7:40 -7:55 15mins	<p>IF NOT ALREADY COVERED: How important is it that consumers are told about the change in regulations? How should consumers be told about this? Who do you think should be providing this information?</p> <p>Overall, what do you think any proposed changes to regulation might mean for:</p> <p>The FSA? Are there any additional controls/resources/admin which you think the FSA will need, should they progress with these proposed plans?</p> <ul style="list-style-type: none"> • food businesses? • consumers? <p>Moderator to go round group and ask individually if participants are struggling at section</p> <p>What would you say would be the ONE main benefit of potentially diverting from retained EU regulation?</p> <p>What would you say would be the ONE key risk or challenge of potentially diverting from retained EU regulation, if any?</p> <ul style="list-style-type: none"> • who may be most affected here? • what concerns do you have? • do you have any concerns with regards to food safety? • do you have any concerns with regards to animal welfare? • are there any other risks you can think of? <p>What do you now think about the idea that regulations could be different across each of the four nations in the UK? Do you think there could be any positives to this? What about downsides?</p> <p>What is the ONE thing you would want to be in place to reassure you that meat produced under different regulations is safe to eat? What would these assurances or limits look like in practice? Who would be best place to communicate this?</p> <p>What would you want the FSA to prioritise as they develop their plans?</p> <p>Do you have any final thoughts for the FSA? Moderator to decide if would work best to go round group individually here</p> <p>Do you have any questions about what we've discussed today?</p>	Summarise discussions and provide a chance to reflect.
Section 4: Final reflections	5 mins	<p>MODERATOR TO SHARE SIGNPOSTING SLIDE ON SCREEN SHOW SLIDE 15</p> <p>If anyone has any questions about food safety at home, you can contact these places. I'm going to leave this slide up, so you can take a note of their names and contact details if of interest. Please let me know if you would like me to send you a copy of this.</p> <p>THANK AND CLOSE</p>	Thank participants for time and signpost to relevant organisations