The Public's Interests, Needs and Concerns Around Food in Wales

Qualitative and Quantitative Evidence on Public Interests, Needs and Concerns around Food in Wales

Conducted for the Food Standards Agency and Food Standards Scotland by Bright Harbour, in partnership with Esposito Research & Strategy and AndGood

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Table of Contents

Preface

A Welsh focus, drawing on UK-wide data and reporting

This research was commissioned by the Food Standards Agency (FSA) and Food Standards Scotland (FSS) to provide a detailed 'snapshot' of people's interests, needs and concerns around food. It explores what key food interests the public would like to see represented and protected on their behalf - in relation to food hygiene and safety but also more widely.

The main report for this piece, and the overall 'story' of project findings, draws on UK-wide data. This included qualitative research with 95 participants; a nationally representative survey of 6,175 UK respondents; input expertise from a 'People's Voice Board'; and input from academic Dr Christian Reynolds (Centre for Food Policy at City, University of London).

The below report highlights Wales-specific data. In general, the Welsh 'picture' is very similar to that reported in the wider data. Where useful, significant differences from the quantitative survey have been noted, and additional qualitative detail has been added to contextualise any regional differences in experiences or views.

A comprehensive view of public interests around food, building on previous evidence

In many ways, the topics, public needs and interests represented in this report are not 'new'. The concerns and priorities it documents are largely well evidenced in previous FSA/FSS[1] and wider research over the last decade or more. Plentiful citations to this foundational evidence are included throughout. However, the shape, intensity and breadth of these interests has varied and evolved, particularly under the rapid and deep change of the last few years - in ways that policy-makers will need to be aware of and account for in order to effectively represent and protect the public interest.

Key contextual drivers of public attitudes and views

The time and context of this work have shaped public experiences and views on multiple levels, as summarised below. Individually, each of these contextual drivers are complex, powerful and nuanced. Collectively, they reflect profound changes to public context generally and around food. We ask readers to keep this wider context of change, uncertainty and instability as shaping the views expressed in this report.

Context Level	**Influential social and media issues/drivers**	**Impact**
The 'Big Picture' UK and global economics and politics	Pandemic.[2] Brexit. Rising concern about climate change. Increasing social inequalities[3] and financial precarity.[4] Free school meals[5] campaign. Uneven public trust in Government and in food businesses.[6]	For many, a sense of instability, precarity, worry about the future.
Personal Context The context in which the public make food decisions	Financial insecurity. Food insecurity.[7] Shortages. Time pressure.[8] Need for convenience food. Information overload. Widespread challenges to 'healthy' eating.	Pressured decisions. Reduced sense of agency. Increasing insecurity. Feeling unsupported.
Fieldwork Window Nov/Dec 2021 (qualitative) then	Omicron restrictions.[9] Petrol shortages. Rising energy prices.[10] Government party 'scandal'.[11] Winter/holiday finance crunch. Food	Fieldwork moment of particularly high stress - in the

Context Level	Influential social and media issues/drivers	Impact
Jan 2022 (quantitative)	shortages.[12] End of £20 Universal Credit uplift.	shadow of prolonged crisis.

Public priorities are complex, fluid and multi-layered

As in previous FSA research, the public's experiences, views and concerns around food reported here are complex and multi-layered. People's food worlds are experienced holistically, as are priorities and concerns related to food affordability, quality, health, ethics and so on. This can be a challenge for policy-makers who typically operate in more clear-cut 'issue siloes', as public concerns and interests rarely exist in isolation.

Public priorities around food are also extremely fluid - even contradictory. People's views about 'what matters' shifts depending on their focus: immediate and personal needs and challenges on a typical day - or the more abstract and long-term (the future, the environment, and so on).

To aid the reader, after establishing contextual factors that shape views and needs across issue areas, 'wider interests' are discussed broadly in the order of public importance - flowing from the immediate to the longer-term. However, we ask the reader to remember that in practice, 'ranked' priorities were less clear cut. Unsurprisingly, people want support both for now and for the future; for policy-makers to support both their immediate and longer-term interests.

Thank you

To the members of our People's Voice Board for guiding this process throughout: sharing your lived experience; acting as our conscience around inclusivity and public respect; and reviewing materials and findings to ensure they felt fair and accessible.

Executive Summary

Introduction

The Food Standards Agency and Food Standards Scotland have a long-standing history of open policy-making, founded in rich evidence gathering and participatory discussions with the UK public about their experiences, needs, interests and concerns around food.

As a result, these agencies have amassed a substantial, evolving evidence base about public priorities and interests around food safety and hygiene issues - but also wider interests that shape public food worlds. FSA and wider research has clearly shown that the Welsh and wider UK publics care deeply about a wide range of 'wider interests' - including health and nutrition; environment and ethics[13]; consumer versus 'business' power; our potential 'food futures'[14]; and so on.

This research was commissioned to build on this evidence, providing up-to-date insights on the 'wider interests' around food that the public want represented and protected on their behalf. It explored the views of both the 'general public' as well as groups that are traditionally less heard by policy-makers.

Method and Sample

Data were gathered using multiple methods over several stages of research - including a total of 95 qualitative participants (12 in Wales) and 6175 survey respondents (507 in Wales).

A rapid mapping of existing evidence shaped project objectives and materials
A 'People's Voice Board' of 8 UK people guided the project throughout.
75 'general public' participants were engaged in qualitative research via group workshops, remote ethnography tasks, and 1-1 depth interviews

20 ‘targeted groups’ participants were engaged via mix of depth interviewing and remote ethnography, boosting understanding of typically ‘less heard’ groups
A nationally representative online survey, reaching 6175 respondents across the four nations of the UK validated and extended qualitative research findings

Key findings: Contextual Drivers Shaping Public Interests and Concerns
Below we present contextual issues and challenges that shaped public interests, attitudes and needs across different ‘issue’ spaces - such as food safety and hygiene, health and nutrition, and ethics and environment issues. These wider contextual drivers of public experiences and needs must be taken into account by policymakers seeking to support the public’s ‘wider interests’ around food, in order to ensure that policies engage with the realities of people’s lives.[15]

In general, the national picture in Wales is remarkably aligned with the wider UK ‘story’, both in terms of quantitative evidence and the lived experiences shared within qualitative discussions. Statistically, views on key issues tended to be within a few percentage points of the overall UK average. There also wasn’t any consistent direction to these differences, In contrast to other devolved nations (Northern Ireland, Scotland - where concerns and worries were often more pronounced, and differences from the UK average more consistently negative.

However, overall survey responses also suggested that Welsh residents may feel slightly less empowered to impact the food system, and less able to access certain food channels, than residents across the UK more widely. This may be reflective of a population which lives[16] predominantly in rural villages (18%), small towns distant from other towns (13%) or small towns close to other towns (25%) - adding to 56%, this is significantly higher than the UK average (42%). The data indicated:
Significantly more reliance on budget supermarkets: 25% mention this channel as their main source of food (vs 19% UK average).

Significantly less likelihood of feeling that their food choices can help shape the food system for the better: 55% agreed in Wales (vs 61% UK average).
Significantly less usage of food delivery apps / websites.
Significantly more concerns about the price of food in future (80% vs 76% UK average)

In addition, respondents in Wales were the most likely across all nations to feel they do not have a 'go to' source of information for food (34% saying 'none' vs 30% UK average). Welsh participants were also the least likely to use mainstream news for information on food - only 14% did (vs 22% UK average).

Key findings in detail:

This research evidences several areas in which our current food systems are judged as working well. For example, people generally feel their food is safe and hygienic; most have access to a degree of choice they are satisfied with; the public feel they know enough about how to keep themselves safe and well.

However, there was also a widespread sense that the food system is not working as well as it should for the UK public - particularly for those less financially secure. Concerns related to these perceived 'imbalances' and 'unfairnesses' in the system were often more dominant in people's minds than the elements they felt were going well. In particular:

Many feel pressured and unsupported in relation to their food choices
People found it difficult if not impossible to 'juggle' competing drivers (for example price, value, budget, convenience, health and so on) - and to make choices that align with both their short-term and long-term interests and concerns.
There was a sense that 'no choice is perfect': the tasty meal may not be healthy; the quality meal is too expensive; the healthy meal takes too long to make; and so on.

Price often won out as a driver of food choices, leading many to make compromises that feel uncomfortable - around health, environment, wider ethical values, but also for those who are most pressured around 'basics' like safety or even sufficiency. Many also found it harder than they would like to access trustworthy information and guidance to shape their food choices - making it harder to navigate these pressures.

Existing concerns are being amplified by wider uncertainty and pressure
Wider contextual uncertainty and pressure had a negative impact that was evident across all nations of the UK, equally in rural and urban areas, and across all levels of society - including amongst Welsh people.
Only 52% in Wales (vs. 53% UK average) of survey respondents reported that they were beginning 2022 feeling 'optimistic about the future'.
In some qualitative groups, financial pressures in particular were causing visible distress, with some groups being stopped for participant care reasons.
Concerns seemed to be amplified by an increasing lack of trust that key food decision-makers have their best interests at heart.
The public worried that our food systems and decision-makers (including food businesses and 'Government') prioritise profit over people.
Participants tended to feel business was the most powerful force in shaping our food systems, and 55% of survey respondents in Wales (vs. 56% UK average) expressed concern for the future over 'the power of big food manufacturers and retailers'.

Trust in Government decision-makers was even lower. Only 28% (vs. 32% UK average) said they trusted the Government to 'act in their best interests', falling to 9% (vs. 11% UK average) who would choose Government or local-authority as trusted sources of information about food.

Note that the specific role of the food regulator (FSA/FSS) in the food system was not discussed in depth. In previous research the FSA has attracted very high overall trust scores.[17]

Food security is under threat, particularly amongst more marginalised groups
Most people are feeling at least some level of financial pressure around food choices. Food prices are a 'flashpoint' of deep public concern and worry.
26% in Wales (significantly higher than the UK average of 20%) spontaneously mentioned food prices as an area of future concern – this is well ahead of any other spontaneous mentions.
Whilst people on higher incomes have more agency and are better able to afford food that fits their values and have greater access to wider choice, many have also experienced rising costs, food shortages and/or increasing financial pressure or uncertainty.

Prompted concern levels were even higher, with 80% in Wales selecting food prices as a major concern for the future of food across all UK nations (also significantly higher than the UK average of 76%).

A majority of people (67% in Wales vs. 65% UK average) had modified their food behaviours as a result of financial concerns[18]; only 52% (same as the UK average) said they are able to afford the quality of food they want at all times (down to 39% vs. 38% UK average among those on lowest income).

Many are food insecure - in ways that mirror existing social-inequalities:
Worryingly, 29% (vs. 28% UK average) of respondents in Wales reported behaviours associated with low or very low food security.[19] For example: reduced quality or variety of food, not eating when hungry, or skipping meals for financial reasons. These are much more prevalent among those on lower incomes or facing other socio-economic challenges.

Within the wider UK sample, low or very low food security was more prevalent among those on lower incomes; Millennial and Gen Z respondents; people living in larger households; and for Asian, Black, African and Caribbean people.

Key findings in detail: The Public's 'Wider Interests' around Food

As noted in the preface, the public's needs and concerns around food were experienced as connected and intertwined - topics that constitute distinct policy areas for the regulator were seen by the public as interconnected: for instance, animal welfare and food safety, or healthy nutrition and affordability. This made ranking their interests a challenging task for people.

Given the pressures outlined above, on a day-to-day basis, people tended to prioritise their immediate needs and interests: ensuring the food they ate was safe and as healthy as it could be for the budget they had to spend. For most, wider ethical, environmental and food systems interests took a backseat in their day-to-day food choices - as a result of financial or time pressures, lack of availability or accessibility. However, these systemic considerations were deemed by people as important to resolve in the long-term, and the frequent compromises made around these issues was a source of deep worry .

In this report we explore the public's 'wider interests' in broad order of priority. This rough order of priorities was true both for Welsh people and for the wider UK sample:

- Ensuring equitable, affordable access to safe, healthy food;
- Ensuring high quality UK food safety, hygiene and standards;
- Ethics, environment and systems issues; and
- Ease of making healthy, nutritious choices.

However, in practice, the public's priorities were not as clear cut as this simple 'ranking' would suggest. For example, many took passionate interest in long-term and future-facing issues; they just didn't feel they had the agency to act on these in their own personal choices, especially on a day-to-day basis.

Tangible, specific issues also sometimes attracted more public interest than complex concerns. For example, issues like 'plastics waste' or 'supporting farmers' were ranked as stand-out priorities for action - even though these were not necessarily the highest priority concerns overall.

The public wanted decision-makers to support both their immediate interests and concerns - to make it easier for them to make everyday food choices that align with their needs and values - and to protect the long-term interests of people and the planet.

Priority area 1: Equitable, affordable access to safe, healthy food

Issues related to rising prices, the affordability of healthy food and social inequalities dominated - in terms of the public's current worries; concerns for the future, and priority actions. This was seen as a space that affects all other public food interests. Concerns in this space were slightly higher in Wales than for the wider UK:
80% in Wales (vs. 76% UK average) chose 'the price of food' as a concern for the future of food over the next three years.[20]

70% (vs. 68% UK average) saw the cost of healthy food as a major concern for the future.

64% of people (same as the UK average) cited 'food poverty and food inequality' as a major concern for the future of food in the UK over the next three years.

Ensuring 'healthy food at affordable prices'[21] was the top priority for action for the food industry, and the second-highest priority action for 'Government'.[22]
For the wider UK sample, concerns around food prices were highest amongst those already food insecure; people with long-term health conditions; women; Asian, Black, African and Caribbean people; and people with food allergies or intolerances. Notably, this was a top priority area even for those who are highly food secure, likely reflecting both concern for others as well as an increasing sense of diminishing affordability even for the more 'well off.'

Priority area 2: Ensuring high-quality food safety, hygiene and standards

Food safety, hygiene and standards were seen as priority public interests that needed to be represented and protected: no one wants food that will make them unwell or is produced to questionable standards. In the minds of the public, 'high standards' were also associated with better health impact, and more ethical, sustainable practice. Key findings in this space were as follows:

In general, public trust in current UK food safety, hygiene and standards was high 82% in Wales (vs. 79% UK average) said they trusted their food is made and stored according to good safety standards.[23] 80% (vs. 78% UK average) reported that they trusted the places they eat or buy from to handle food safely and hygienically. Qualitatively, people perceived UK food hygiene and safety standards as 'higher' than those in other countries - especially around hidden ingredients, hormones and food cleaning (such as chlorinated chicken).

Participants in qualitative groups expressed a sense that 'someone' is looking after food safety, hygiene and standards for the greater good.

However, knowledge of the specific remit and role of the regulators varied between individuals and was generally low. The most visible aspect of the regulators' role was the safety inspection ratings on food outlets' doors (Food Hygiene Rating Scheme). Many were interested in knowing more about the regulators' activities.

However, lower income and less food secure people expressed more concern

Across the UK sample, concerns around safety, hygiene and standards were higher across a number of measures for people on lower incomes (less than £19,000 annual household income) and/or those who were less food secure.

This seemed linked to wider concerns and worries about 'risky' practices employed to help make money stretch: for example eating or freezing about-to-expire food; batch cooking; buying 'lower quality' foods, etc.

Concerns might also have been influenced by a general sense of precarity more widely; many had nowhere else to compromise in their food budgets.

Many worry about whether standards will be maintained post-Brexit

47% in Wales (vs. 50% UK average) expressed major concerns about food standards post-Brexit In particular, many worried that post-Brexit, 'poor practice' from abroad will increasingly decrease the safety and quality of food available in the UK. Participants in the qualitative research widely wanted high standards upheld in the future. Amongst survey respondents, 43% (vs. 44% UK average) explicitly stated that high standards of food safety and hygiene across the food chain are important to them for the future.

This issue was rated as significantly more important amongst Welsh people aged 45 or older.

Many want action on wider 'safety issues': processed food and animal welfare

In line with previous FSA and wider evidence, a large proportion of the public in Wales, as in the wider UK, worried about the long-term safety of things 'added to' the food they eat, and/or highly processed foods.

Many were concerned that although these foods are 'safe right now' they may cause long-term or more subtle negative impacts on health and well-being. 60% in Wales (vs. 61% UK average) expressed concerns about the 'over-processing' of food in the UK's food future.

45% (vs. 47% UK average) stated they would like to see regulatory action in order to 'reduce things added in the food process for example, E-numbers, preservatives'. 60% of survey respondents (same as the UK average) rated treatment of animals in the food chain as a major concern. Qualitatively, there was a sense that fair treatment of animals in the food chain goes hand-in-hand with good food safety and quality standards.

Priority area 3: Guiding fair, ethical and sustainable food systems and futures

The public didn't feel much agency in terms of their 'wider interests' around food system ethics and environment; their values in these spaces tended to be sacrificed for more immediate drivers, especially in response to financial pressure.

Accessing trustworthy information in this space also felt hard. Many did not trust the information provided by food businesses, and on-pack information about environmental impact and animal welfare weren't easy to understand, or didn't include the kinds of information people wanted. For example, participants noted that it was hard to get a sense of things like 'food miles', land use, hormone use, and so on.

The public wanted the Government, food industry and the FSA/FSS to work together to guide fair, ethical, sustainable food systems and futures on their behalf.

Most immediately, people wanted to see protection for British farming post-Brexit - and were eager for support for more 'local' food systems (of UK origin)

- 62% (vs. 59% UK average) said they worry about the future of British farming
- 56% (vs. 58% UK average) expressed concerns over UK 'dependency on food imports
- 56% (vs. 59% UK average) said they trust local food producers to have higher quality standards than big business
- 47% (same as the UK average) said they actively try to buy from local food producers.

People wanted to see decision-makers maintain or strengthen ethical standards in the food chain, for example around animal rights - both for UK-made and imported food products.

More broadly, climate and animal welfare concerns dominated

Qualitative research showed that interests and concerns in this space feel increasingly more immediate and more relevant to more people.

- 59% in Wales (vs. 60% UK average) said they worry about the environmental impact of our food systems.
- 56% (vs. 58% UK average) cited the impact of climate change on food production as a major concern for the next 3 years.
- 39% (vs. 41% UK average) choose 'a food system that treats animals in the food chain with dignity' as a key action area for the next 3 years.

Food waste and packaging waste were flashpoints for concerns:

- 65% (same as UK average) said they worry about packaging waste in the food chain
- 66% (vs. 67% UK average) reported that they try to reduce or avoid food products that create plastic waste.
- 77% (vs. 78% UK average) said they find it unacceptable to throw food away at home
- 66% (vs. 64% UK average) reported worry about food waste in the food chain.

Ethical treatment of food system workers was potentially an emergent concern.

- 43% (vs. 46% UK average) said they see treatment of workers in the food chain as a major concern
- 33% (vs. 32% UK average) said that they see fair treatment of these workers as a priority over the next 3 years.
- 47% (vs. 48% UK average) chose 'ensure fair treatment for workers, farmers and small producers in the food chain' as a priority issue for action from the food regulator.

Priority area 4: Making it easier to access and choose healthy, nutritious food

As above, price dominated within health and nutrition concerns, with many feeling 'priced out' of the food they thought was best for their health. Beyond price, the Welsh (and wider UK) public felt it was far harder than it should be to make healthy, nutritious choices. However, guidance on healthy nutrition tended not to feature highly in ratings of priority actions. Key findings in this space:

Most want to eat healthily and feel they broadly know what 'healthy' food is
Welsh people wanted to live healthy lives even if this requires effort - 63% (same as the UK average) said they are prepared to make big changes to their lifestyle in order to be healthier.

66% of survey respondents in Wales (vs. 70% UK average) also said they feel that they know what a healthy, nutritious diet is - typically, associated with 'fresh', minimally processed food and wide variety.

However, making healthy, nutritious food choices feels challenging in practice
Price and other pressures often push out health and nutrition ideals

- In Wales, 53% of survey respondents (same as the UK average) felt priced out of healthy food
- 32% (vs. 31% UK average) said they find it difficult to find fresh foods that fit their budget (also significantly higher than the 31% UK average).
- 54% (same as the UK average) said that they think supermarkets encourage the purchase of unhealthy foods.
- 25% (same as the UK average) agreed that heavily processed foods are often the only option available to them
- 51% (vs. 50% UK average) reported worry about the long-term impact of their food choices on their health (significantly higher for those aged 18-44 (59% vs. 60% UK average).

A majority also felt confused or misled by industry information about 'healthy food'.

- A range of issues were raised around interpreting and navigating health information (overwhelm, text size, portions confusion, 'hidden' sugars', etc).
- 57% (vs. 61% UK average) felt that foods labelled as 'healthier options' (for example. low fat, low sugar, plant-based meat alternatives) are unhealthy in other ways.
- Guidance to support healthy choices often felt unhelpful or 'too simplistic'
- Advice often felt more theoretical than practical, not reflecting modern pressures, conflicts, tensions, health needs, personalised diets, and so on.

- More financially pressured people particularly were interested in ‘real life’ guidance for eating on a budget: support to navigate abstract ‘rules’ into actual shopping decisions.

Chapter 1: Introduction

Background and objective

In this chapter we outline the context in which this work was commissioned and delivered; our key objectives; and the methods and samples used in our mixed-method qualitative and quantitative investigation. Please see the Technical Appendix for full methodology and sample detail.

1.1 Background to this research

The Food Standards Agency (FSA) and Food Standards Scotland (FSS) are independent government departments tasked with ensuring 'food we can trust' for people in the UK, and ensuring that food has a strong reputation for safety and authenticity both in the UK and abroad. Beyond food safety, their work also supports wider public interests around food - issues such as food price, availability, standards, and (some elements of) standards around environmental and animal welfare concerns.[24]

The FSA and FSS have amassed a rich evidence base[25] on what matters to the UK public in relation to food and food governance, including how their views, behaviours and needs have changed over time. This evidence base has consistently shown that the UK public, including Welsh people, have strong views and needs around wider food issues that stretch far beyond food safety. It also shows a clear public expectation that decision-makers should work collaboratively and proactively to ensure that these needs and interests are protected.[26]

The last several years have presented widespread and rapid change that has profoundly shaped both the evolving UK food system and the public's experiences within it:

- Pandemic disruption has often accelerated existing trends in changing public food behaviours and attitudes. Over the last two years, many people have reassessed how they eat, where they shop and what their priorities are around food.[27]
- Brexit has caused profound shifts in UK supply chains and standards,[28] raising public awareness and discussion of these kinds of systems-level food issues.
- Food availability has been disrupted, especially in devolved nations and more rural locations.[29] 56% of UK people experienced some level of shortage in Q4 of 2021.[30]
- The UK public are increasingly interested in the environmental implications of our food systems - people report feeling concerned about the impact of food production on the environment (sustainability) and the welfare of animals in the food industry (both 62%).[31] A similar pattern is observed in our findings.
- Half of UK families have experienced reductions in disposable income since 2019[32], at the same time that food prices have risen, including sharp rises during periods of lock-downs[33] and higher rises for basic / budget food items.[34] Rates of food insecurity and food-bank dependence have increased substantially.[35] [36] [37]

In light of this rapid and widespread change, the FSA and FSS commissioned this research to provide up-to-date understanding of:

1. **how the public's wider interests around food are changing**, and the key experiences and influences that shape their views and needs;
2. **how experiences, views and needs vary**: what matters most to whom, and who is most affected by any current challenges in the system;
3. **expectations and priorities** in terms of how the FSA/FSS and others ensure these wider needs and interests are heard, represented and protected.

1.2 Developing the research aims and objectives

Our research was designed to explore the following six topic areas, all of which were consistently highlighted in previous research as shapers of UK food experiences:

1. **Food safety and hygiene** - exploring any changing views or emerging challenges around the FSA/FSS core remit: ensuring that food is safe to eat right now and in the future, and being able to trust that the places people eat are handling food safely.
2. **Health and nutrition** - what people feel makes it easier and harder to eat in ways that nourish them and support their health, and what they would like to see done in this space on their behalf.
3. **'Juggling' price, value, quality and convenience** - how easy people find it to make food choices that work for them whilst balancing sometimes competing drivers in terms of budget, food quality, nutrition and convenience needs.
4. **Trust and transparency** - whether people feel they can get clear, trustworthy information about their food and the food system - for example, in terms of information on food labels, but also more widely.
5. **Animal welfare, environment and future generations** - the impact of the food people eat and food systems on animals, the environment, and future generations.
6. **Regulation and communications** - whether people feel the Government is protecting their interests and needs around food, whether they feel they have the information they need to make decisions, and what they need to see, hear and believe to feel that their interests have been protected.

The specific objectives explored within each key issue area evolved over the course of the research. For example, during the qualitative research it became clear that concepts like 'trust and transparency' or 'regulation and communications' were deemed as lenses through which to view other issue areas - rather than areas of focus in their own right.

The specific objectives explored within each key issue area evolved over the course of the research.[38] Our approach and materials were also shaped by:

- **Rapid mapping of existing literature and insight**[39]
- **Input and guidance from a 'People's Voice Advisory Board'**[40]
- **Support from our academic partner: food systems expert Dr Christian Reynolds** (Centre for Food Policy at City, University of London).[41]

1.3 Qualitative primary research

A total of 95 participants were included via a mix of group workshops, remote ethnography tasks, and 1-1 depth interviews.[42] This included 75 'general public' participants, and 20 people from 'targeted groups - people typically less heard by policymakers. Sample and approach summaries are provided below. Please see the Technical report for full methodological, sample and analysis details; copies of materials used; and information on participant safeguarding.

1.3.1 Sample and approach: 'general public'

Our 'general public' sample included a roughly representative spectrum of UK participants in terms of demographics (age, gender, lifestage, income, ethnicity, nationality and so on).

- **Total sample:**
  - **n=75; 40 England, 10 Wales, 10 NI, 15 Scotland**

- **Approach:**

- **13 x 1.5 hour group workshops with a pre-task (n=75)** - the pre-task included two short 15-minute tasks to identify the core issue spaces to explore with participants in the group workshops.
- **Two week online ethnography (n=40)** - A selection of general public participants completed 5 online tasks each over the course of 2 weeks, exploring around 4 interest areas each.
- **13 x 1.5hr group workshops with a pre-task (n=70)** - all participants came together for a final workshop focussed on public priorities for policymakers.

1.3.2 Sample and approach: 'targeted groups'

- **Total sample: n=20; 11 England, 3 Wales, 3 NI, 3 Scotland**
    - 11 people with household health issues or disabilities shaping food choices;
    - 9 ethnic/religious minority participants;
    - 5 older adults (age 70 plus);
    - 6 very low income participants, and 9 who had experienced some level of food insecurity in the last year.
    - 4 people who were less digitally confident.

- **Approach:**
    - **20 x 1-1.5hr targeted depth interviews** - 1-1 sessions allowed focussed exploration of participant contexts and how these shaped interests and needs.
    - **6 x follow up tasks** - to explore issues in more depth.

1.4 Quantitative primary research

The approach and the contents of this phase of work were directly informed by the qualitative primary research described in section 1.3 above.

A summary of sample and approach, including details of the food security measure used, are outlined below. Please see the Technical Report for full methodological, sample, and analysis details plus full survey content.

1.4.1 Sample

Online research with 6175 participants was conducted between 14 and 28 January 2022 with adults aged 18+ across the four nations of the UK.

Within each nation, nationally representative quotas were set on age, gender, classification of Chief Wage Earner, as well as monitoring ethnicity and incidence of long-term chronic conditions. Data was then weighted to form a UK total representative of all nations in the right proportions.

1.4.2 Contents and approach

The online survey, lasting 20 minutes, was positioned as being on behalf of the FSA (in England, Wales and Northern Ireland) and FSS (in Scotland). The questionnaire collected information about people's socio-demographic situation, food shopping and food preparation behaviour, food security, and attitudes to a range of topics impacting food choices. The survey also explored respondent's concerns, areas of interest and priorities for government, industry and the food regulators in the next three years.

1.4.3 Food security measure

Given the prevalence of people's concerns around food prices and their impact on food choices identified in the qualitative stage, and with the input of the research's People Voice Advisory Board and academic validation from the Centre for Food Policy at City, University of London, a bespoke approach to food security was implemented in the quantitative stage. This approach built on the USDA food insecurity measure[43] but was designed to provide a comprehensive view of the range of food behaviours that people experience in relation to financial pressures.

Chapter 2: The UK public's wider context

Pressures, uncertainties and challenges shaping the public's food experiences, interests and concerns

In this chapter, we outline some of the key pressures and tensions around money, profit and public needs that shaped public decision-making around food in Wales.

As in the rest of the UK, in Wales we saw that the public felt they were navigating an increasingly complex, challenging food system that often prioritises profit over people or planet. Their ability to consistently access and choose safe, healthy affordable food was under increasing pressure, as was their ability to shop in line with their wider values. Most also did not trust or feel supported by either government or industry, and information that should in theory support informed decision making often felt inaccessible or misleading.

In particular, financial pressure was causing increasing strain for many in Wales, as in the wider UK. Most reported that the price of food and, for many,[44] limited food budgets, often 'squeezed out' other high-priority and immediate considerations such as health and quality - let alone more systemic considerations around environment, fairness, welfare, etc. Many were also experiencing reduced food security, in ways that tracked alongside existing social inequalities, and even higher-income people increasingly found their food choices shaped by financial concerns.

Overall, Welsh findings were generally in line with the UK overall. Qualitatively, there was slightly less sense of 'pressure' on the public as compared to other devolved nations or to the UK picture overall. However, given the small sample sizes this may not reflect any true difference in experiences or needs.

2.1 For the Welsh public, food choices often felt like 'an impossible juggle'

2.1.1 Core public interests driving food choices often conflicted in challenging ways

As evidenced in previous FSA/FSS research[45], the public in Wales, as across the rest of the UK, often felt that the core drivers of their food choices often exist in tension, which made it very difficult to 'get it all right' in terms of their daily food choices. Core drivers (price - quality - health - convenience - values - taste - and so on) often pulled them in different directions.

For example:

- higher quality food was perceived as more expensive;
- food in the more convenient formats (for instance semi-prepared, pre-prepared, ready to eat) was perceived as less healthy and/or safe;
- needs of one person in the household often conflicted with the needs of another;
- 'healthy' food felt more time-intensive to make, sometimes unrealistically so;
- figuring out an 'environmentally friendly' way to eat took more time and energy; etc.

The net result of 'juggling' these layered interests was that food choices felt pressured and complex for many. Most people wanted to meet as many needs as they could, but acknowledged that trying to reconcile multiple needs at once took time and energy. For example, people talked of the difficulty of weighing up the emotional, physical, financial and logistical impact of one option versus another; of investing more time and effort to 'stretch' food budgets by 'shopping around' across multiple suppliers; and of the emotional toll of feeling they were 'getting it wrong' despite their best efforts.

As in the wider UK, people in Wales with caring responsibilities often felt the weight of this juggle particularly heavily, including parents (especially mothers, who were more likely to hold the domestic labour of meal planning and cooking) and those caring for adult dependents.

2.1.2 The 'juggle' gets harder when there's more to balance or less 'give' in the system

People experienced this 'juggle' around food choices in very different ways depending on individual context. Some had more to balance, less time or emotional energy to 'spend' making choices, or smaller food budgets that restricted the options available. For example:

- parents were often balancing conflicting needs across the household (as above);
- people with very pressured or unpredictable work schedules had less ability to plan ahead, invest in food preparation; or 'shop around' to help meet their needs;
- people with serious health issues often had a more urgent need for healthy food - but potentially more constraints on time or budgets' (see Ch. X for more detail);
- some more remote rural residents had more time cost involved in accessing food, or restricted access to choice because they were limited to a small number of local shops - meaning they had less 'flex' in terms of food options; and
- some neurodiverse participants talked about the extra emotional and physical 'costs' of visiting retailers and making food choices, limiting their decision 'bandwidth'.

2.2 Profit and price pressures drove compromises and insecurity

In the 'juggle' around food choices outlined above, food budgets and food price were often highly constraining factors. Those with more to spend had more 'flex' to use to make choices that met most or all of their needs; those with less to spend typically found their choices harder, and made more compromises around food.

Most people in this research, both in Wales and in the UK more widely, were experiencing financial constriction of their food choices in some way, with a sizable minority experiencing low food security (reduced quality, variety of desirability of diet for financial reasons) or very low food security (disrupted eating patterns or reduced food intake for financial reasons).[46] Food security levels tracked with wider established social inequalities in the UK.

2.2.1 Few felt able to regularly make food choices that fully meet their needs and values

Fewer than half of respondents in Wales (52%, same as the UK average) said that they can afford the quality of food they want at all times. Although respondents wished that price and quality were fairly equal drivers in terms of their food choices, followed by health and nutrition, in actuality, food price trumped all other drivers.

Figure 1. Influences on food choices, ideal world vs. reality [CHART 13]

This chart shows the average share of influence out of 100 for a range of factors - in terms of how people would choose foods in an ideal world, and the way they choose in reality.

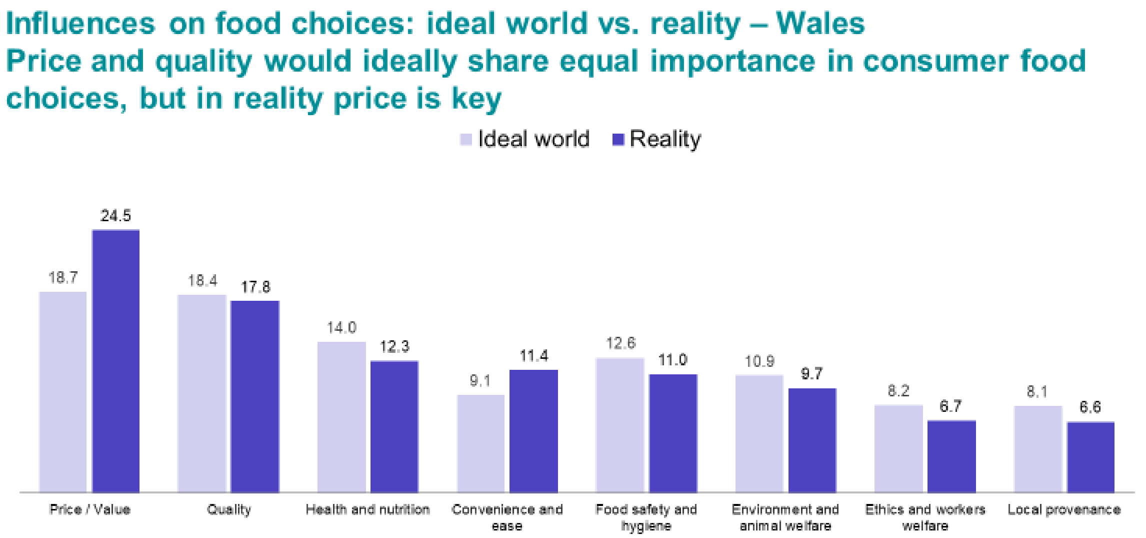

Chart number 13: Influences on food choices – ideal world vs. reality – share of influence out of 100 – Wales

Q7. This is what influences my food choices when buying food nowadays
Q6. This is what would influence my choices in an ideal world
Base: Wales total=507

This sense of restricted choice and agency was a source of widespread public frustration, especially among those on lower incomes.

2.2.2 Price pressures drove uncomfortable compromises for many

Many expressed deep frustration about the compromises they had to make in terms of food quality, health, nutrition or wider values as a result of limited budgets and/or financial pressure. Across age, gender, and income bands, it was clear that the food that people most valued in terms of health, and that felt most 'positive' in terms of wider impact on people and planet, generally felt unrealistically expensive.

This feeling of having to make consumer choices that felt out of line with their wider interests and values created a sense of ''cognitive dissonance'[47] - a discomfort created by the gap between what people *said they wanted and valued* versus what they *actually bought and ate in practice.* Health and nutrition interests in particular were often compromised when budgets tightened. For example, many lower income participants said that they were often unable to afford even simple 'fresh' foods - which they want to prioritise in terms of health, safety and enjoyment, but these are more expensive than the more processed or convenience options.

Sometimes, this feeling of being unable to afford fresh ingredients for cooking also resulted in reduced engagement and connection to cultural heritage or community, for example for minority ethnic group participants who felt 'priced out' of cooking cultural favourites.

2.2.3 Financial pressures increasingly shaped food behaviour even of 'more secure' people

Only 52% of Welsh respondents (same as the UK average) felt that they could afford the quality of food they want at all times . Indeed, price pressures were having a significant impact on people in Wales. In the last 12 months:

33% of people (vs. 35% in the UK as a whole) had not had to make any changes to their behaviours whatsoever in the last 12 months as a result of money worries: (67% vs 65% in UK as a whole) modifying their food behaviours as a result of financial concerns.[48]

2.3 Low food security drove compromises on basic sufficiency for many

It was not the aim of this research to provide robust estimates of food security levels for the UK population; readers particularly interested in this space may find tracking data provided by the FSA elsewhere useful.[49] However, our data do clearly show that many in Wales, as in the UK more widely, reported behaviours in line with low or very low food security. Figures were roughly in line with the UK overall.

Table 1. Prevalence of very low/low food security in Wales

Food security	Wales	Total UK
Very low security	9%	8%
Low security	10%	12%
Marginal security	9%	9%
High risk	7%	6%
Low risk	30%	31%
No risk	33%	35%

As explored in detail in previous FSA and wider research[50], for these individuals the consequences of low food insecurity were often serious and multiple - with Welsh residents did meet criteria for low/low food security seeming to be slightly more likely to be experiencing negative impact as compared to the UK overall. Among those classified as very low or low food secure in Wales: [51] [52]

- 58% (vs. 52% UK average) said they had been unable to eat healthy balanced meals in the past 12 months (vs. 4% for those food secure[53] (same as the UK average).
- 51% (vs. 43% UK average) had skipped meals because there was not enough money for food (vs. 2% for those food secure (1% UK average).
- 48% (vs. 40% UK average) said they had been unable to buy food due to lack of money (vs. 1% food secure (same as the UK average).

"Fresh" (minimally processed) meat and produce were often amongst the first 'luxuries' to go when budgets tightened, leaving many to worry about the impact of their food choices on health. People also worried that the food they could afford was low-quality and below minimum acceptable standard; tasting bad, nutritionally suspect, and low-enjoyment.

Moreover, financial pressures increasingly shaped food behaviour even of 'more secure' people: only 33% of Welsh residents (vs. 35% in the UK as a whole) reported that their choices had not been affected at all by financial worries - with a significant majority (67% vs 65% in UK as a whole) modifying their food behaviours as a result of financial concerns.[54]

2.4 Trust was low that public interests in this space were being protected

As in the wider UK, the public in Wales expressed low trust in food businesses. As is explored in detail in the overall UK report, across almost every topic area there was an assumption that business was highly influential in the food system - and that it prioritised its own interests over people (both consumers and food system workers), animals and planet.

- Across all socio-demographic groups, 75% of survey respondents in Wales (same as the UK average) reported feeling that 'the food Industry is putting profits before people's needs.'
- Only 40% (vs. 39% UK average) believed 'big food companies treat their workers fairly'.
- 19% (same as the UK average) trusted food manufacturers and brands as sources of information about food.

Worryingly, there was a widespread sense of public cynicism about whether 'Government' acts as an effective counterbalance to corporate interests in the food system. Trust in Government was low, with 28% (vs. 32% UK average) of Welsh people reporting they trusted the Government to act in their best interests generally.

When it came to information about food specifically:

- 18% of Welsh residents said they trust their Government for information about food (compared to 15% in Northern Ireland and 24% in Scotland.) [55]
- Only 9% (vs. 14% UK average) said they trust the UK Government, ministers and departments[56].
- Only 9% (vs. 11% UK average) said they trust their local authorities (consistent across all nations).

2.5 Implications for policy-makers and decision-makers

The wider contextual challenges outlined in this chapter are largely beyond the scope of any one body to address. Food poverty and social inequality can't be solved by a single Department or simple policy change; they are systemic issues requiring collaborative, systemic, sustained action.

However, this report details people's experiences and needs around these wider tensions and concerns because the public wanted their worries to be heard. Policy-makers must account for these across all areas of action they take on the public's behalf. Acknowledging these challenges and incorporating them in planning and action is critical to representing and protecting the public interest around food.

It is also important to register that the widespread frustration and perceived lack of agency experienced by the public seemed to be contributing to a sense of unease about the UK food system as a whole. There was a sense from many that as our food systems evolved, they had become more global, more profit-driven, more influenced by big food businesses, and more focused on processed food - and that along the way we made natural, fresh, healthy food less accessible.

Chapter 3: Equitable access to safe, healthy, affordable food

In this chapter, we briefly explore a public desire for change that stretches across a range of 'wider interests': the desire for everyone to be able to access safe, healthy, affordable food. There was a strong belief that everyone 'should' have access to this, but concerns about rising food prices made many fear that the future of UK food would likely be more unequal.

We explore public views in this area, which were seen as influencing all other 'wider interests' and concerns (for example food safety, hygiene and standards; health and nutrition; and ethics and environment issues). Each of these specific 'wider interest' areas are then explored in depth in the Chapters to follow.

In general, Welsh views were strongly in line with the wider UK averages, although concerns about price were spontaneously higher than the UK average overall.

3.1 The Welsh public wanted everyone to have access to positive food choices

In line with recent evidence from the FSA/FSS and others[57], the majority of Welsh people in this research felt that everyone should have access to healthy, nutritious food. Most believed that regardless of personal circumstances, people should be able to eat food that keeps them in good health and able to function - and were frustrated that a 'well off' nation like the UK was far from realising this ideal. When people were asked to outline positive food futures they thought that the UK should aim for, more equitable access to healthy, affordable food featured strongly.

Recent media coverage around inequalities in food access seemed influential in shaping these views, with the 'Free School Meals' campaign led by Marcus Rashford and partners (such as the Food Foundation) being particularly powerful. The idea of children going hungry during a public health crisis (Covid 19) proved highly evocative, as had social media coverage of 'sub-par' free school meals supplied by contracted providers.

The strength of public opinion in this space had likely also been affected by personal experience. Given the number of people experiencing lowering food security themselves or feeling under pressure around food prices[58], the fragility of food security was increasingly becoming a tangible reality in the UK public's daily lives rather than a point of abstract ethics.

3.2 However, this aspiration seemed increasingly out of reach - and rising food prices proved a major 'flashpoint' of public concern

Despite these optimistic aspirations, fears about the future were widespread. The public expressed widespread concern that their agency, choice and security around food will face increasing pressure in the future.

In the quantitative survey, 26% of people in Wales (significantly higher than the UK average of 20%) spontaneously raised the increasing price of food as something that worries them for the future - this far outweighed any other concern in terms of top of mind salience for respondents. 64% of people (same as the UK average) chose food poverty and inequality as a priority area of focus over the next 3 years, with many also expressing concern about this issue spontaneously in the qualitative research.

For some lower income participants, price concerns were so dominant as to make discussion of other issues almost impossible. Several qualitative sessions with lower-income participants needed to be paused or stopped for safeguarding reasons in response to visible participant distress.

Although people on higher incomes had more agency, they too have experienced rising costs and other issues that restrict choice (like food shortages). This seemed to be contributing to a sense of unease about whether their choice and agency would be protected in the future - with this realisation serving as a source of deep concern for many. Many who felt 'safe' themselves also expressed worries about widening social inequalities and the impact on UK society as a whole.

3.3 Representing and protecting people's interests around equitable access to safe, healthy, affordable food

3.3.1 Future focus

The Welsh public - and UK public at large - wanted their ability to access safe, healthy, affordable food to be protected. They see this as a priority area for government and regulator intervention, as they do not believe that food businesses will prioritise public interests in the absence of external pressure.

A majority of people (53% in Wales vs. 50% UK average) saw access to healthy food products at affordable prices as important to them for the future (36% cite this as a priority area vs. 34% UK average). 40% (vs. 41% UK average) mentioned access to good quality, low priced-food that is not over-processed. 25% (vs. 24% on average in the UK) cited this as a priority area.

Note that as reported above, interest in this issue registered elsewhere in the survey was even higher: 80% of the total sample (significantly higher than 76% UK average) indicated that the price of food is a concern for the future; 64% (same as the UK average) said the same for food poverty and inequality. However, qualitative evidence suggested that there was real cynicism about whether Government and regulators could or would actually take action in this space, which may have influenced how survey respondents chose which actions they would like to be prioritised.

3.3.2 Action areas for the regulator (working with partners)[59]

Overall, the public wanted the regulator to work with partners in order to deliver genuine choices for people in terms of quality, healthy and affordable options. The number one priority people wanted to see actioned was to ensure that low-priced foods meet a good baseline level of quality, and conversely, that good quality food (including local and fresh produce) is also affordable, The public also wanted to see action around ensuring that promotions include fresh produce and fresh foods, not just processed foods.

Whilst activities in this space may not fall directly within the regulator's remit, the pressures on the public described in this chapter, not least price pressures and increasing food insecurity, were informing the public's desire to see access to affordable healthy nutrition to be safeguarded in some form.

The first column below shows the action areas in priority order of mentions

FSA	England, Wales and Northern Ireland	Wales
1	Ensure greater choice of basic low-priced foods of good quality (48%)	Ensure greater choice of basic low-priced foods of good quality (48%)
2	Ensure promotions include fresh produce and fresh foods, not just processed foods (42%)	Ensure children receive the nutrition they need at school and at home (45%)

FSA	England, Wales and Northern Ireland	Wales
3	Ensure access to affordable, locally produced foods (41%)	Ensure meals served in nurseries, schools, care homes, hospitals are healthy and nutritious (43%)
4	Ensure meals served in nurseries, schools, care homes, hospitals are healthy and nutritious (40%)	Ensure access to affordable, locally produced foods (40%)
5	Ensure children receive the nutrition they need at school and at home (39%)	Ensure promotions include fresh produce and fresh foods, not just processed foods (39%)
6	Encourage food brands to offer a greater choice of healthy products (33%)	Encourage food brands to offer a greater choice of healthy products (30%)
	Only 6% did not want the FSA to take any action in this policy area.	Only 5% did not want the FSA to take any action in this policy area.

Chapter 4: Food Safety, Hygiene and Standards

4.1 Overview

Overall, as in the rest of the UK, the public in Wales clearly cared about the safety, hygiene and standards of the food they eat and wanted to see their interests in this space protected. Most believed that the food they eat is safe and hygienically handled, and many express a high degree of pride in UK food standards. Experiences were less positive and trust was lower amongst lower income and less food secure participants.

However, many worried about the maintenance of our standards in the future (post-Brexit), about the long-term safety of things 'added to food' like hormones, pesticides and additives, and about the safety implications of animal welfare standards. Allergen management and information was also an area of concern for many.

Participants were eager to see a 'strong' regulator who represents and protects their interests in this space - for example, by clearly prioritising people over profit. They are eager to see the safety, hygiene and standards of the food we eat in the UK maintained and-or strengthened in future, particularly in terms of protecting standards post-Brexit.

In general, Welsh views were strikingly in line with wider UK averages, with no significant differences in views quantitatively.

4.2 Public interest in hygiene, safety and standards issues

4.2.1 Hygiene, safety and standards remain core interests for the UK public

Food safety, hygiene and standards were all issues that clearly mattered to participants, viewed as foundational food issues that affect everyone in the UK; no-one wishes to have unsafe, unhygienic or low-standard food. In the qualitative research, this was ranked as the top issue area in terms of public priorities - and was also consistently chosen by participants as a priority issue for discussion in the group workshops.

In line with previous evidence[60] people in this research tended to conflate questions of ‘safety,’ ‘hygiene’ and ‘standards’ - and their responses to one or more of these issues were often deeply emotive.

On a personal level, participants spoke about the importance of avoiding food poisoning and ill health; their responsibilities to keep children or loved ones safe; managing allergen exposure risk, and so on. As discussed elsewhere, for some participants this topic also encompassed concerns around ‘things added to food’ such as pesticides or hormones (see Ch 4.2.3), or the long-term sustainability and environmental impact of our food systems, especially around animal welfare standards (see Ch 4.2.4).

For participants with health issues, disabilities, and/or allergies, food safety often felt particularly urgent. For example, some participants noted that food poisoning or allergen exposure might have serious and/or long-term consequences - reducing their ability to work, or worsening sometimes already precarious health.

4.2.2 Covid and Brexit may have heightened public consideration of this space

The Covid-19 pandemic seemed to have heightened public awareness of safety and hygiene issues. There was a sense that the pandemic had made many participants more conscious about hygiene issues in relation to food preparation, packaging and delivery. Notably, in contrast to FSA research conducted in early 2020,[61] there was no sense that people thought the pandemic or associated financial pressures had resulted in 'slipping standards' for food businesses.

> "I'm a lot more cautious with loose products. Before Covid it would never have gone through my head to wash vegetables, you'd assume it'd be done for you." M, 27, C2, White, Rural Wales

Brexit media discussion and lived experience of the impact of Brexit on food transport and availability also seemed to have driven more consideration of issues such as international food standards or global supply chains, with many participants in the qualitative research spontaneously raising examples of 'lower' standards elsewhere. For example, participants referenced concerns around 'chlorinated chicken' or 'hormone injected beef'. These were much lower profile issues in FSA research discussions in earlier years, often requiring substantial education and prompting to enable discussion.

4.2.3 However, safety, hygiene and standards are not core decision making drivers

For most survey respondents, safety and hygiene considerations did not play a big role in everyday food purchasing decisions. We measured this quantitatively by asking survey participants to consider 8 major drivers of choice[62] - identified in the qualitative stage - and allocate 100 points, however they wanted, to show the relative share of influence of each factor on their day to day food choices, In terms of day to day decisions, health and safety considerations attracted on average 11 points out of 100, meaning that its weight on the decision, or share of influence, was 11% (same as the UK average). This was significantly below factors of price (25%, same as the UK average) and quality (18% vs. 17% UK average), on par with factors of health and nutrition (12% vs. 13% UK average) and on a par with convenience (11% vs. 12% UK average).

As explored below, this is likely because of respondents' assumptions that the food they eat is generally safe, hygienically handled, and governed by strong standards. They appreciate being able to trust that their interests are represented in this space and value food safety, but do not think much about it day-to-day. In effect, food safety, hygiene and standards are quite literally 'hygiene factors' in people's day-to-day food choices.

> "The only time I think food is unsafe is when you get MPs saying chickens give you salmonella - then you start thinking is our food fit for purpose." M, 39, C2, White, Older Children, Suburban Wales

4.3 The general public view on current food safety, hygiene and standards

In general, public experiences around UK food safety, hygiene and standards are positive, and trust in the safety of the food they eat is high. However, there are some common areas of concern, centring around enforcement, the long-term safety of more heavily processed foods, and allergens regulation and information provision.[63]

4.3.1 Most have high confidence in UK food safety, hygiene and standards

In general, the Welsh and wider UK publics believed that the food they eat is governed by high standards, handled and stored hygienically, and safe to eat. 80% in Wales (vs. 78% UK average)[64] trusted that the places where they eat or buy from are handling food safely and hygienically. 82% (vs. 79% UK average) trusted that the foods sold in shops are made and stored according to good safety standards.[65]

In line with previous evidence,[66] qualitative discussions suggested that this high participant confidence was rooted in generally positive personal food experiences, supported by signals that 'someone' (the FSA/FSS and its partners) was looking after public interests in this space. For example, most felt that:

- Hygiene ratings show that safety and hygiene standards are regulated and enforced
- Supermarket shopping and most restaurant experiences were safe and hygienic
- Sell-by dates show 'someone' wants to help keep them safe.

> "I've worked in a supermarket… you can mostly trust the food if you use your common sense. And I know there's a 95% chance that the food I'm going to buy is going to serve its purpose, and that I'm not going to give it a sniff and chuck it in the bin…. Also, there hasn't been a backlash around food safety in the news, so they must be doing a pretty ok job." M, 27, C2, White, Rural Wales

Where concerns were raised, these tended to be sparked by personal, immediate experiences in retail environments (usually supermarkets) rather than more deeply rooted concerns - as for this generally trusting but occasionally ‘spooked’ Welsh participant:

> “To be honest, I would say they're doing the best as they can. You see a lot of things on news and if there's anything that goes wrong (like with food recalls), obviously they alert you straight away. And if you go in the supermarket in the afternoon you see them checking things, not just things in the fridge but even canned things, keeping everything up to date… But I did see a mouse once running around in the supermarket where they have bread rolls and things. It’s not his fault because that’s where his food is, but it’s not nice to see!” F, 41, C1, Pakistani, Grown Children, Religious Dietary Restrictions, Suburban Wales

4.3.2 Enforcement was a concern for some: ‘are regulators actually upholding the rules?’

Despite the public’s general trust and confidence in this space, they did express some concerns - often about whether the ‘signals’ they saw that ‘someone’ was looking after their interests were actually supported in practice. For example, participants raised questions around:

- Why food businesses with low safety and hygiene ratings were allowed to stay open
- Whether ‘bad businesses’ were ‘really’ being made to improve practice
- Why supermarkets are allowed to send short-dated food to online shoppers
- The safety and hygiene practices of smaller or independent businesses.
- Whether use-by dates were reliable given ‘other people’s behaviour’ in stores

> “You know, in the superstores, you see these things that are still in date, but the ready-meals and things, they don’t feel that fresh. And also, you know, maybe sometimes customers are maybe taking things out of the fridge and they are being in trolleys, or you know, like people change their mind or

something that makes it go funny as well. So then I have to think... what do I really want to be buying?" F, 41, C1, Pakistani, Grown Children, Religious Dietary Restrictions, Suburban Wales

When asked about these concerns, participants' discussions often centred around low levels of trust that 'Government' had enough power - and/or enough will - to enforce rules and penalise poor practice. These discussions often aligned with wider concerns about who 'government really cared about protecting': the public or businesses.

One Welsh participant who had worked in a supermarket said he thought that the wider public would be very reassured if they understood more about what goes into audits and the standards that food was held to:

> "It would be great to have info about FSA audits at the front of supermarkets so it's visible to a customer's naked eye. As a customer you don't know anything about the background of an FSA audit. People would have a lot more trust in what they buy if they did." M, 27, C2, White, Rural Wales

4.3.3 Many worried about the safety of highly processed foods and wanted transparency

In line with previous FSA and wider evidence,[67] a large proportion of the Welsh (and wider UK) public expressed worry about the long-term safety of things 'added to food' like hormones, pesticides and additives. 45% of people in Wales (vs. 47% UK average) stated they would like to see regulatory action in order to 'reduce things added in the food process e.g. E-numbers, preservatives'.

Concerns centred around the long-term health and safety implications of these additives. In contrast, fresh, organic, 'unprocessed' or minimally processed food was too expensive and/or time consuming to be a realistic choice for many. 42% of respondents in Wales (vs. 40% UK average) said they 'often rely on quick to prepare convenience foods (such as ready meals, frozen pizza, fish fingers, nuggets etc.)' and 25% (same as the UK average) agreed that heavily processed foods are often the only option available to them.

Participants also expressed frustration about a perceived lack of transparency about exactly 'what is in our food'. Information on labels (for example about additives or preservatives) felt hard to understand; looking up information about things like pesticide or hormone use was challenging; many felt uncertain that they could find 'the truth' regardless.

> "Being honest I don't think food is healthy or safe to eat in this day and age. Some items I used to eat as a child don't taste the same as now. Food and the way it is grown and processed is becoming more and more dangerous. Meat produce is mass produced and pumped to up the weight. Vegetables are being grown genetically modified. There are a whole heap of additives and preservatives in certain foods. More and more people are getting allergies to certain foods. But factories are producing and packaging food items around certain food items which cause allergies." F, 30, C2, Pakistani, Children under 8, Asthma, Suburban Wales

In responding to the statement, "I find it difficult to understand what a product contains", only 33% disagreed (vs. 37% UK average). This suggested that for 66%, there was a degree of difficulty in understanding what is in the food that people buy. For many, this sense that the food system has 'opaque' and 'black box' elements contributed to concerns about whether public interests were being adequately protected.

Some participants also voiced frustration about the fact that, since this information is not easily traceable, no one can be held accountable. As elsewhere, concerns felt amplified for those that had lower general trust in business, and in government/regulators to prioritise public over business interests.

4.3.4 People saw animal welfare as a key part of food safety and hygiene

Animal welfare was also a concern area in food, with 60% of survey respondents (same as the UK average) seeing the treatment of animals in the food chain as a major concern. It seemed that for most people, this was raised primarily in relation to questions of food trust, safety and transparency than in terms of ethics or animal rights per se. As per the discussion around processed food, above, there was a sense that things 'done to' animals used for food production might have a range of negative impacts - including on long-term human health.

Ethical (not 'safety') concerns around animal welfare are discussed in more depth in Ch 5.1.

4.3.5 More support was wanted around allergen information, regulation and enforcement

Ensuring protection for people with allergies and hypersensitivities also emerged as a substantive area of concern, particularly, but not only, for those directly affected.

42% of respondents in Wales (vs. 39% UK average) agreed that they were 'concerned that the way allergens are labelled on food packs is unclear' - notably much higher than the 7% of respondents (vs. 9% UK average) who themselves lived with allergies or hypersensitivities. 'Enforcing clearer labelling of food ingredients and allergens' was cited by 39% of respondents (vs. 43% UK average) as a priority action area for regulators.

> "The biggest factor for me is allergens in food. I myself suffer from a nut allergy (all nuts) and this can be a large issue when choosing food to eat as many food producers like to put labels on foods stating 'may contain traces of nuts.' And that leaves the responsibility on me to decide if I want to consume that food, because it would in theory remove the liability from the food producer if I were to have a reaction." M, 24, C1, White, No Children, Urban Wales

Likewise, many participants in the qualitative research reported they found it difficult to access the information they needed to make safe, informed decisions about allergenic ingredients and/or cross-contamination risks. Whether eating out, food shopping or preparing food at home, participants often found allergen information hard to access, inconsistent and/or unclear.

For example, participants raised examples of restaurant staff making people with allergies feel unwelcome or not being able to distinguish critical allergen information from wider 'lifestyle choice' ingredient notices. Precautionary allergen labelling such as 'may contain' notices were reported as particularly confusing,

These clarity and access issues, coupled with a perception that food businesses seemed not to take allergen concerns seriously, had the effect of making people feel less safe, unsupported, and less trusting of food businesses and regulation alike. In discussions, there was a palpable sense of frustration from some participants.

4.4 The public worried about whether standards will be maintained in future

The effect of Brexit was of lower concern in Wales as compared to England and especially in relation to the other devolved nations, although still substantial. The public's worries centred around whether the standards food is held to in the UK will change as supply chains and trade agreements evolve post-Brexit. 47% of survey respondents (vs. 50% UK average) reported concern about food standards post-Brexit. As previously mentioned, media coverage of post-Brexit trade deals and standards seemed to have been influential in shaping views in this space. For some, concerns around increasing food travel times also played a role.

UK wide, concerns over less stringent food safety standards post-Brexit were significantly higher amongst women, people under 45, and ethnic minorities. The reason for this is uncertain, although some conjectures can be made from the wider evidence about potential drivers. Across the research, these groups tended to express more concerns and worry overall, potentially driven by the sense of more 'pressure' around food (as explored in Ch 2.2). These demographic variables are also associated with risk factors in terms of lower food security - aligning with the increased sense of risk exposure in terms of food safety, as above.

4.5 Summary: representing and protecting people's interests around food hygiene, safety and standards

4.5.1 Future focus

As seen in the UK as a whole, the public in Wales were keen to ensure that food safety, hygiene and wider standards 'don't slip' or are strengthened as the global landscape changes. In Wales, 43% (vs. 44% UK average) of people wanted to see high standards of food safety and hygiene across the food chain in the future - and 22% (vs. 24% UK average) cited this as a priority area for them..

As above, key concern areas centred around ensuring standards are maintained or strengthened post-Brexit, ensuring strong UK food business safety and hygiene via strong regulator enforcement, and more widely around ensuring transparent guidance and information about the long-term safety of processed foods and current animal welfare standards in the food chain.

4.5.2 Action areas for the regulator[68]

Overall, it was clear that respondents wanted the regulator to take a stronger stance against corporate failure to uphold standards, and to enforce stricter standards on additives and labelling - they were looking to the FSA to take action with the food industry as a higher priority to providing guidance to individuals.

The first column below shows the action areas in priority order of mentions

FSA	England, Wales and Northern Ireland	Wales
1	Hold companies account in a visible way (50%)	Hold companies account in a visible way (52%)
2	Take action to reduce additives (47%)	Take action to reduce additives (45%)
3	Enforce clearer labelling of food ingredients and allergens (43%)	Enforce clearer labelling of food ingredients and allergens (39%)
4	Ensure the public can easily report unsafe food handling in places that serve food (36%)	Ensure the public can easily report unsafe food handling in places that serve food (36%)

FSA	England, Wales and Northern Ireland	Wales
5	Make it easier to under understand best before/use by dates (30%)	Make it easier to under understand best before/use by dates (34%)
6	Communicate more about food inspections of places that serve food (27%)	Communicate more about food inspections of places that serve food (29%)
-	Only 7% did not want the FSA to take any action in this policy area.	Only 6% did not want the FSA to take any action in this policy area.

Chapter 5: Ethics, environment and systems

Impact on people, animals, country and planet

In this chapter, we discuss wider food issues that many in the public care about, but often didn't feel they can prioritise on a personal, day-to-day level. In the context of a deep gap between people's interest and their perceived agency, the public were eager for decision-makers to take action and drive positive, sustainable food futures.

There was widespread public engagement and worry about environmental issues, including around how our food systems can help or harm the planet, and how we can minimise and/or adapt to the increasing threats of climate change. For the public, food ethics and environmental considerations were intertwined with other interests discussed previously: what was assumed to be bad for the planet was often assumed also bad for people at multiple levels.

More widely, there was evidence of public interest in more 'systemic' food system issues, linked for many with concerns around the future of British agriculture. There was strong engagement with questions of how to support and protect British farmers and UK agriculture post-Brexit, and widespread interest around questions of what more 'local' agricultural systems could look like in the UK. Specific issues around worker rights and agricultural innovation were less common but potentially emergent interests.

In Wales, there was a sense of very slightly lower participant engagement around the idea of eco-friendly or sustainable eating, and significantly lower sense of consumer power to shape the food system as compared to the UK average. However, in general, views were strongly aligned with the wider UK averages.

5.1 Public interest and engagement around food ethics and environment

5.1.1. Food ethics and environmental considerations intertwined with other interests

Participants tended to express needs and interests around ethical and/or environmental issues as connected to other interests and concerns discussed previously. What was assumed to be bad for the planet was often assumed also bad for people at multiple levels. In the long term, this is due to the negative impacts of intensive or mass production food systems on climate change and therefore on the human population, whilst in the short term, due to mass-market food production impacting public health and wellbeing.

For example, participants tended to associate a number of negative issues with more processed food: less ethical and environmentally friendly food production practices; more use of additives, pesticides and hormones; reduced ‘quality’ and ‘safety’; potentially poorer worker treatment; lower animal welfare; and so on.

Interests in this space were often two-fold: the public were eager to see food systems that feel fair and positive for people and the planet *in general*, and they also often had concerns about how ‘unfair’, ‘unethical’ or ‘unsustainable’ practices affect them *now.*

5.1.2 The public were highly interested in the future of British agriculture

Across the UK sample, participants in this research were keen to discuss systemic food system issues which in previous research have been areas that raised interest only among a minority. Qualitatively, spontaneous reference to what have previously been seen as ‘abstract’ food issues was notably higher than in previous

FSA research, and spread amongst a broader spectrum of public audiences - albeit slightly less pronounced amongst Welsh participants overall.

Quantitatively, Welsh views were broadly in line or slightly lower than the UK averages, and somewhat lower than for the other devolved nations.

When asked about their concerns for the future of food in the UK, respondents in Wales spontaneously mention issues such as Brexit (6%, vs. 5% UK average), animal welfare (5% vs. 6% UK average) and British farming and imports (4% vs. 7% UK average). These issues were often interlinked in people's minds.

5.1.3 Many aspired to a more eco-friendly diet, but there were widespread barriers to public action and engagement

Regardless of their personal interest levels in terms of sustainable eating, most people in this research prioritised more immediate, personal interests and needs in their day-to-day decisions. Overall, Welsh respondents also seemed to be slightly less driven by ecological considerations or 'organic' foods as compared to others in the UK.

For example, 51% of survey respondents in Wales (vs. 54% UK average) reported they would like to have a more eco-friendly diet - but only 23% (significantly below the 28% UK average) said that they tend to look for food that is 'organic or 100% natural' (assumed to be 'eco-friendly' amongst qualitative participants). 40% (also significantly below the 46% UK average) reported being prepared to pay more for food that is 'environmentally-friendly' or made to high welfare standards.[69]

Barriers described by participants include the need to prioritise other decision-making factors (especially price); a lack of easily accessible, trusted information; and feeling that the problem is 'too big' for individual decisions to make a difference. It was striking that 'tangible' environmental issues like food and packaging waste often acted as flashpoints for engagement, likely in part because they felt more contained and feasible to tackle.

5.1.4 The public had a wider interest of the mutual impact between our food system and the environment in the long-term

When they think about the future over the next three years, it is clear that the public in Wales, as in the rest of the UK, see a relationship where the food system impacts on the environment, and the environment impacts on the food system.[70]

While they appreciated that these impacts have the potential to be positive, the majority believed that the current relationship does more harm than good: 59% in Wales (vs. 60% UK average) reported worry about the impact of our food system on the environment; 56% (vs. 58% UK average) cited the impact of climate change on food production as a major concern for the next 3 years.

5.2 The general public view on food ethics and environment issues

5.2.1 Many felt priced out of making food choices that align with their wider values

There was a widespread sense that 'ethical' and environmentally friendly foods come at a price premium - making these wider public interests particularly vulnerable to price pressure. For example, this was assumed to include organic produce, 'ethically reared' meat, Fair Trade products, locally produced foods, etc. Buying food that felt ethically sound thus felt like a privilege available to the few, not an option for the many.

This made environmental and ethical concerns particularly vulnerable to price pressure, leaving many feeling that they could not fully 'shop their values' in this space. For others, it seemed to simply reduce engagement; why worry about something you couldn't do anything about? Amongst the most price-concerned participants in the qualitative research there was sometimes visible discomfort when environmental issues were raised; it felt like a luxury concern compared to more pressing issues around affordability and access.

> "[Farmer's markets] are sort of seen as, you know, the organic stuff, and the more expensive stuff, better for the environment. I know lots of people won't even be able to afford to buy at the farmers market. I tend to go and look at lots of things, but I don't really buy much there, as much as I'd like to. There's a split with healthy food, and it always seems to be a lot more expensive than you know the potato waffles. So there is a fine line between splitting what people would like to do for the environment and then what they can actually afford to do." M, 62, B, White, Grown Children, Asthma, Suburban Wales

5.2.2 Understanding 'the right choice' in terms of ethics and environment is a challenge

Despite generally high interest in environmental issues and food ethics, there was a high degree of confusion about what was a 'right choice' for people in this space.

Even finding information they could trust seemed to be a challenge for many. Only 77% (vs. 78% UK average) reported finding on-pack information about a product's environmental impact easy to understand; 38% (vs. 42% UK average) said they find on-pack information about animal welfare easy to understand.

Participants in the qualitative research also spoke about feeling that the 'true' environmental or ethical implications of the foods they ate were hard to determine.

The kind of information they wanted was typically not available on-pack, and information provided by businesses was often not trusted - with some highly environmentally engaged participants mentioning concerns about 'greenwashing'.

Although a lesser priority than other action areas outlined in this report, some members of the public (20%) expressed interest in having guidance to make it easier to make eco-friendly food choices in their day to day lives. It was notable that whilst 51% (vs. 54% UK average) expressed an interest in having a more eco-friendly diet, only 19% (vs. 20% UK average) expressed an interest in receiving guidance to achieve this in the future - this implies the issue for respondents is less one of guidance and education, and more one of access and trust in labelling.

5.2.3. The public wanted a secure future for British farming and local producers

The future of British farming was a strong area of public engagement across this research. Qualitatively, there was a sense of 'exposure due to Brexit', with people worried that we would need to adopt 'lesser' standards from other countries in future, or that local producers would come under increasing pressure in future. This was often linked to beliefs that 'local' food produced in the UK (or, for many devolved nations residents, within their 'home' nation) was likely higher quality than foods imported from abroad.

Quantitative evidence confirmed the public interest in this space.

- 62% (vs. 59% UK average) chose the future of British farming as a major concern
- 56% (vs. 58% UK average) reported worry over the UK's dependency on food imports.

Local provenance was a similar influence on purchase decisions in Wales - both in terms of what people do and what they would like to do - as in the other nations of the UK:

- 47% (same as the UK average) reported that they actively look to buy from local producers
- 40% said they food from independent retailers, farm shops or vegetable box schemes at least once a month (significantly higher than all other nations; UK average 30%)
- Although only 3% use these local channels as a main source of food - similar to other UK nations.
- 56% of Welsh respondents (vs. 59% UK average) trusted local food producers to have higher quality standards than big business.

Several Welsh participants raised concerns about whether Welsh agricultural businesses were being adequately supported, for example raising questions of whether they were being 'squeezed out' by financial pressures or perceived retailer dominance:

> "I recently started to go to my local butchers more for food… I'm a big believer in supporting local businesses and farmers because they've had a tough time through Covid… We have to support farmers so that every farmer in Britain can survive and enjoy life as much as everyone else, so they don't burn themselves into the ground trying to produce stuff for Britain while being at a loss. Every litre of milk that a farmer produces, they get 25p, while a litre of milk in the supermarket can cost you 50p - where is the rest of it going? Is it the government? Is it the supermarket?" M, 27, C2, White, Rural Wales

Looking ahead, 33% (vs. 34% UK average) identified access to locally produced foods as a priority area in the future and 40% (vs. 42% UK average) of people said they would like the regulators to work with partners to ensure access to *affordable* locally produced foods.

5.2.4 Some also questioned whether personal action can make a difference

More widely, many questioned whether their choices can have any 'real' impact on issues like environmental sustainability or the 'fairness' of our food systems - feeling that corporate interests often have much more influence in this space.

Many questioned whether their choices can have any 'real' impact on issues like environmental sustainability or the 'fairness' of our food systems - feeling that corporate interests have much more influence in this space. Only 55% (significantly lower than 61% UK average) agreed that 'as a consumer, my food choices can help shape the food system for the better', 75% (vs. 75% UK average) endorsed the view that profit drives the food system.[71]

Qualitatively, some expressed a sense that businesses and decision-makers will only make change if 'forced to' by consumers, which for these participants meant personal choices were very important. However, others challenged that under consumer pressure, businesses will often only do 'just enough' to be seen as taking action - but not enough to create any real change.

> "Lots of the big chains like Tescos and Asda can make a lot more of a difference if they weren't so profit oriented rather than doing more to help with the environment. … [It] could be working with the companies to help them towards using the biodegradable plastic, because they obviously haven't been forced to use better things…I want the companies who sort of use the products we're all talking about to have a bit more thought for the world." M, 62, B, White, Grown Children, Asthma, Suburban Wales

This sense of disempowerment, coupled with worry whether food businesses would ‘do the right thing’ in terms of moving towards more ethical sustainable practice, was a source of clear concern and anxiety for some participants. There was a strong desire from these participants for ‘Government’ or regulators to take action on their behalf - sometimes coupled with cynicism about whether this was achievable in practice.

> “Whenever I buy some food that seems really cheap I do wonder how much money actually goes to the farmers. As an example when milk is always around £1.10 I do wonder how the Dairy Farmers earn a living.” M, 24, E, White British, Cardiff

5.2.5 Food and packaging waste served as tangible flash-points for wider abstract issues

Waste was one area of the food system where most people felt they had at least some tangible power to take action. Waste was also an emotive issue which strongly engaged a majority of the public, both in terms of food and packaging waste - often discussed in the same breath by participants in the qualitative research.

Amongst survey respondents, Welsh views were in line with wider UK averages:

- 77% (vs. 78% UK average) reported finding it unacceptable to throw food away at home.[72]
- 66% (vs. 64% UK average) said they worry about food waste in the food chain.
- 65% (same as the UK average) said they worry about packaging waste in the food chain.
- 66% (vs. 67% UK average) said they try to reduce or avoid food products that create plastic waste.[73]

Qualitative research suggested this high public interest is driven by multiple factors:

- Substantial recent media attention on waste issues (particularly around plastics);
- A feeling that waste is a tangible symptom of larger issues (environmentally unfriendly practices; wasteful processes; etc.);
- Belief that some progress has been made (such as around plastic waste) and that further change is possible; and
- Sense of ethical discomfort or moral outrage that some are left hungry whilst elsewhere food goes to waste.
- Participants' own habits of avoiding waste (in part due to price rises, and in part due to traditional values of making good use of food)

  "The prices for food have gone really up. Yeah. And literally everything - like petrol and other stuff as well… So you have to think in other ways, like. You can't just be spending all your money on food, food, food, there's other stuff as well. So you try to keep food as much as you can as long as it's good and healthy and eatable… I don't want to be wasting food." F, 41, C1, Pakistani, Grown Children, Religious Dietary Restrictions, Suburban Wales

Waste felt like an issue that individuals could have some individual impact on - but there was also eagerness for more systemic change. Many in the qualitative research were critical of the ways in which current food systems encouraged what they saw as 'poor practice' on waste. For example, participants raised discussions around:

- Feeling 'pressured' by deals/promotions which encourage food waste.
- Food being wasted by retailers that could go to those in need.
- Low-waste options being positioned as more premium and expensive.
- Low-waste options being unrealistically inconvenient for many.

5.2.6 Animal welfare and worker rights are also part of a more sustainable future

As discussed elsewhere, animal welfare was a concern for the majority of survey respondents - although for many in qualitative discussions, this seemed to be about assumed 'safety' as much as ethics or animal rights. 60% in Wales (same as the UK average) saw treatment of animals in the food chain as a major concern, though a smaller 39% (vs. 41% UK average) wanted, in the next 3 years, to prioritise action towards a food system that treats animals in the food chain with dignity (as the bigger inference from animal welfare is to do with safety standards and not with ethics).

> "I want to see better safety of the animals on the farms by farming more natural, more organic farming and better quality of foods… like, in the abattoirs they should put more CCTV in to keep records on the hygiene. This makes me feel that my meat is safer to eat if abattoirs and butchers are keeping clean" F, 40, C2, Child Under 18, Rural Wales

For some, particularly vegan and vegetarian participants, animal welfare was experienced as an urgent concern. These participants tended to think of animal welfare standards as 'necessary but not sufficient' - also wanting to see promotion of food systems which reduced meat consumption more widely.

Amongst Welsh participants, there was often more 'closeness' to local agriculture in comparison to the UK sample more widely - for example, with several participants either living near farmland or having worked directly in the agricultural industry at one point in their lives. This caused some discomfort for some of these participants around animal welfare issues, regardless of their own dietary choices.

> "I won't be anywhere near the butchers or the abattoirs, so I won't be anywhere near the killing of animals. I'm just going to be driving around in a forklift picking orders for companies. Although I'm a big meat eater, I don't condone the killing of animals at all, so it's not something I'd like to witness, but it's not enough to make me want to stop eating meat." M, 27, C2, White, Rural Wales

The treatment of workers in the food chain was spontaneously raised by qualitative participants surprisingly often in comparison to previous research, in which this was generally quite a marginal issue. Quantitatively, 43% (vs. 46% UK average) saw treatment of workers in the food chain as a major concern, and 33% (vs. 32% UK average) saw fair treatment of these workers as a priority over the next 3 years. Although not a priority as compared to the other issues outlined above, this may thus be an emergent concern worth monitoring by the FSA and other decision makers.

In contrast, if farmers and small producers are brought into scope, respondents' interest in Wales rose: 47% (vs. 48% UK average) cited 'ensure fair treatment for workers, farmers and small producers in the food chain' as an area for action from the food regulator. This difference was likely influenced by public desire to see a 'fair deal' for UK agriculture, as discussed previously.

5.3 Public views on the future of food ethics and environment issues

In the qualitative research, there was a clear sense of urgency for many around the future of food in relation to ethical and environmental issues, including amongst Welsh participants. Many participants expressed deep worry and anxiety about the increasing impact of climate emergency - and that we might act 'too late' in terms of changing our food systems and choices to avoid or mitigate harm.

For example, when completing 'future of food' tasks and asked to describe the food futures they feared for the UK, some participants described fairly dystopian outcomes, in which profit motives and lack of public engagement had failed to mitigate climate disaster. Many also expressed concern about disproportionate impact on those already vulnerable, both in the UK and globally.

More widely, there was a sense that people 'hoped' for a future in which food systems generally felt 'more safe and ethical'. Ideally, they wanted to see a food system which served the best interests of animals, people and the planet. Some expressed optimism that a strong consumer voice, smart investment in innovation, and/or dedicated action from decision-makers could help achieve this. However, this was countered by a sense of despair and cynicism from others that meaningful change could be achieved.

5.4 Summary: what people want done on their behalf

5.4.1 Future focus

The public wanted the Government, the food industry and regulators to work together towards developing a more sustainable system that is fair, ethical and respectful of animals, people and the planet.[74] This was particularly important in the current context where many people feel they can't prioritise or take action on more abstract issues themselves.

5.4.2 Priority action areas for regulators[75]

The key sustainability issues that respondents in Wales would like the food regulator to work with partners on were to: 'ensure high standards of animal welfare including imports' (55%), 'ensure fair treatment of workers, farmers and small producers' (47%) and 'set standards to minimise food waste in the food chain' (46%).

This suggests their focus on reducing food waste is not entirely addressed by the possibility of setting standards around it (qualitative feedback suggested that in the

UK generally, many people were also looking for more pressure on big brands and retailers to take action).

The first column below shows the action areas in priority order of mentions

FSA	England, Wales and Northern Ireland	Wales
1	Ensure high standards of animal welfare, including for imported foods (57%)	Ensure high standards of animal welfare, including for imported foods (55%)
2	Ensure fair treatment for workers, farmers and small producers in the food chain (48%)	Ensure fair treatment for workers, farmers and small producers in the food chain (47%)
3	Set standards to minimise food waste in the food chain (46%)	Set standards to minimise food waste in the food chain (46%)
4	Ensure ‘food miles’ information is clearly given on food products (29%)	Provide an ‘eco-label’ on food products to show their environmental impact (31%)
5	Provide an ‘eco-label’ on food products to show their environmental impact (29%)	Provide clear guidance on how to make eco-friendly choices on a budget (30%)
6	Provide clear guidance on how to make eco-friendly choices on a budget (28%)	Ensure ‘food miles’ information is clearly given on food products (26%)

FSA	England, Wales and Northern Ireland	Wales
-	Only 7% did not want the FSA to take any action in this policy area.	Only 7% did not want the FSA to take any action in this policy area.

Chapter 6: Health and Nutrition

As explored previously, there was a strong sense in this research that everyone in the UK should have access to ‘fresh’, healthy, nutritious, good quality food. More widely, there was broad interest in health and nutrition from the public - with perceptions of ‘good food’ typically meaning food that was ‘minimally processed’ and nutritious (rather than just satiating hunger by being filling, regardless of nutritional benefits).

The Welsh and wider UK public want to live in a world in which it is easy to understand what food is healthy and nutritious, and in which it is easy to make healthy choices. In practice, this ideal was felt to be unachievable for many, with barriers at every level: understanding what ‘healthy’ foods to prioritise; navigating food labelling and marketing; and eating healthily within budget and time constraints. There was interest in actions from policy-makers and others that would make it easier for people to choose healthy, nutritious food in practice.

There were no notable differences between Welsh views and priorities in this space as compared to the UK average.

6.1 Public interest and engagement around health and nutrition

As seen in the rest of the UK:

- A majority in Wales aspired to eat well and valued access to healthy, nutritious food - 63% (same as the UK average) said they were prepared to make big changes to their lifestyle in order to be healthier.

- Covid had increased awareness of health but added pressures on parents, leading to compromises around food due to lack of budget and time.

- People placed a high value on **'fresh', 'unprocessed' and 'nourishing' foods - typically described as including** fruit and vegetables, 'traditional staples' (milk, bread) and 'good quality' meat, as well as home cooking.

- 'Unhealthy foods' were often assumed to be more 'processed', less nutritionally 'balanced', and higher in saturated fat/sugar/salt and 'additives'. They were perceived as less transparent and more opaque: with ingredients that felt unclear, hard to pronounce, and more 'chemical' or 'man made.' 45% (vs. 49% UK average) reported making specific efforts to avoid buying foods that contain ingredients such as trans fats/palm oil/preservatives/E numbers.[76]

6.2 The general public's view on health and nutrition in Wales

Although some participants felt very at peace with their choices, overall very few people in this research felt fully able to consistently access and eat the food they most aspired to in terms of health and nutrition; there were often large gaps between what they wanted to do in theory and the choices they made in practice. These gaps were driven by challenges and barriers at multiple levels.

Individually, these barriers made decision-making around health and nutrition harder. Collectively, they led many to feel that the UK food system was 'stacked against' them - with modern consumers driven to make choices that don't align with their health ideals. Eating healthy thus felt to many, like a privilege - not a right.

6.2.1 Navigating 'what's healthy' felt complex in practice

Many people in this research felt that they had a good sense of what it meant to 'eat healthy', and felt it was fairly easy to identify foods which were 'nutritious'. This instinctive perception was evidenced by 66% of survey respondents in Wales (vs. 70% UK average) stating they were 'confident I know what a healthy nutritious diet is for me'.

However, at a more granular level, the public often felt that deciding what is healthy for them and the people they shopped and cooked for was a challenge. Many found it hard to know which 'experts' to trust, or how to navigate conflicting views - for example, with some extolling the virtues of protein for health and strength, and others viewing meat consumption as a public health disaster. Health trends were seen as shifting over time; what was 'true' today in terms of the health value of a given food might change tomorrow.

Priorities and needs around health and nutrition were also experienced as dynamic, multiple and often conflicting. Within individuals, needs evolved over time in response to shifting health status, work and family dynamics, moods and mental health states, and so on. Within households, health and nutrition needs are often conflicted; one parent might be shopping for a red-meat restricted partner with heart issues; a gym-going, protein hungry teen; a young picky eater whose vegetables were 'snuck into' food, and so on.

6.2.2 For many, healthy eating guidance felt unhelpful and/or outdated

In the face of these layered and complex challenges to healthy eating, the guidance available to the public often felt insufficient, on multiple levels:

- 'Simple' guides (like the EatWell plate) were useful in cutting through overwhelm, but felt hard to translate into actual shopping choices.
- Guidance did not feel helpful in navigating layered and conflicting health needs within households.
- Guidance was not seen to take into account financial constraints, or to support people to make realistic healthy choices on constrained budgets.
- Some guidance felt patronising or stigmatising - for example, with some participants citing BMI health guidelines as 'flawed' or biassed towards white ethnicities.
- To some, guidance felt overly focused on calories rather than nutrients - this being unhelpful in terms of more holistic health, and harmful in terms of eating disorder management.

Some participants noted that, collectively, these gaps sometimes made them feel as if guidance was being provided by people that were 'out of touch' with the modern-day realities facing the UK public.

6.2.3 Food marketing and promotions were perceived as 'pushing' unhealthy food

In general, the Welsh (and wider UK) public did not feel that food marketing and promotions encourage them to make healthy choices.

- 54% in Wales (same as the UK average) agreed that they 'feel supermarkets encourage me to buy unhealthy foods'[77] - with participants in the qualitative research often reporting frustration that promotions tend to centre on more processed products.
- 57% (somewhat lower than the 61% UK average) agreed that they 'often feel that foods labelled as 'healthier options' (e.g., low fat, low sugar, plant-based meat alternatives) are unhealthy in other ways'.[78]

Many also reported feeling that it was often difficult to tell if a food is ‘actually’ good for you from the claims made by the brand or the look and feel of the product, with 61% of survey respondents agreeing that they ‘often feel that foods labelled as ‘healthier options’ (e.g., low fat, low sugar, plant-based meat alternatives) are unhealthy in other ways’.

For example, participants spoke about feeling ‘misled’ by products that were ‘vegan’ or ‘organic’ but included perceived unhealthy levels of fat/salt/sugar and so on. Some also expressed cynicism about the health value of reformulated products - i.e., whether companies were reducing fat/sugar/salt on one side but increasing other ‘unhealthy’ ingredients at the same time.

As a result, many felt as if they were being at best unsupported by the food industry in terms of making healthy choices, and at worst actively misled. Labels and marketing seemed to look as if they were providing useful information for people - whilst actually making their decisions harder. Some participants, primarily younger, voiced these concerns explicitly in terms of social inequalities - worried that poorer UK people are ‘targeted’ by fast food and convenience food brands that may contribute to worse health outcomes for worse-off social groups.

6.2.4 Many found health and nutrition labelling hard to interpret or unhelpful

In theory, there is a great deal of health and nutrition information available on food labels to guide choices. ‘Traffic light’ type labels were also considered useful for many; often raised as a gold-standard of clear, simple, visual communication, and generally easily understood.

However, beyond this many found health and nutrition information on labels confusing, hard to read, or unhelpful in terms of actually making informed decisions.

However, label confusion was also high: In responding to this statement, “I find it difficult to understand what a product contains”, only 33% disagreed (vs. 37% UK average). This suggests that for 67% of Welsh people (vs. 63% UK average), there is a degree of difficulty in understanding what is in the food that people buy.

Qualitative evidence also suggested people faced challenges on many fronts simultaneously, for example in terms of:

- Reading and interpreting scientific and technical terms - particularly given the small text of most label information.
- Accessing clear information about food processing methods used - for example around the use of pesticides, preservatives, hormones, and so on - and their impact
- Understanding the ‘actual’ amount of fat, sugar or salt in a product. For example, people perceived sugars as being ‘hidden’ in labels by appearing under less familiar names (such as dextrose, corn syrup) - or that multiple different forms of sugar were being used in the same product.
- Identifying the actual amount of calories included in a ‘realistic’ portion of food; ‘scaling up’ calculations from portion size to packet size/meal size felt difficult.
- Understanding the nutritional density and total ‘health value’ of a given food
- Using labels to assess information relevant to personal lifestyle or health needs - for example, anti-inflammation diets, ‘heart health’ and so on

Even where overcoming these barriers felt theoretically possible, it added friction during an already pressured moment of decision making for participants. This had the effect of lowering their ability to make choices in line with their personal health priorities.

6.2.5 Eating healthily was perceived as a matter of privilege

The public felt that eating in a healthy and nutritious way almost inevitably involved spending more money, more time and effort, or both. The trade-offs between health interests, price and convenience were familiar to many.[79] In Wales:

- 53% of survey respondents (same as the UK average) reported feeling priced out of healthy food;
- 32% (vs. 31% UK average) said they find it difficult to find fresh foods that fit their budget; and
- 25% (same as the UK average) reported feeling that heavily processed foods are often the only option available to them.

For many Welsh people, this was clearly a source of direct worry and concern:

- 51% (vs. 50% UK average) expressed worry about the long-term impact of their food choices on their health. This worry was also significantly higher for those aged 18-44 (59% vs. 60% UK average).
- 41% (vs. 40% UK average) agreed that they worry that their diet lacks variety; this was also significantly higher for those with young families (56% vs. 57% UK average).

This sense of unequal access also sparked a profound sense of unfairness for many, and a feeling that more should be done to ensure all can eat healthily.

> "I have a very rigid routine with as little change as possible. I do however try to make healthier choices as an example to my child. I would choose to give my children the healthier option above myself, as it can cost more. With myself and children being picky eaters I try and offer as many healthy options as possible. I worry that healthier food costs more and fresh foods are often imported so not as fresh as they state. Healthy options should not cost more."
> F, 40, C2, White British, Child 16+, LGBTQ+, Rural Wales

6.3 Audience differences in priorities and needs around health and nutrition

6.3.1 Serious illness, allergies and/or disabilities increased barriers for many

For people with chronic conditions, disabilities, or allergies, eating well was often at the forefront of their mind, either because their condition significantly impacted what they could eat, or because they saw eating as a way to heal. Many also needed to take a more bespoke approach to 'healthy eating' to avoid unhelpful or harmful ingredients; accommodate nutritional or texture needs; fuel recovery or maximise functioning; and so on.

However, even as healthy eating was often experienced as more urgent or important in this group, for many it was also less financially feasible. For some, health issues significantly restricted income (for example, due to having to reduce or abandon work). For all, costs were higher, for example in the form of:

- Having to buy ergonomic utensils or pre-chopped packaged foods (more expensive than loose fruits and vegetables).
- Needing to rely on more expensive speciality and free-from foods.
- Increased cost of shopping for those with mobility issues (transport, car fuel, minimum spend of £40 for deliveries, food delivery costs).
- Not being able to shop around for more affordable options because of energy deficits, cognitive or sensory overload, brain fog, and so on.

> "Supermarkets are a very stressful situation. To enable me to choose optimal healthy food, I need to see/feel/smell foods. This is difficult for me due to being on the autistic spectrum and time spent in the supermarket is limited. Also unhealthy convenience foods are easily accessible." F, 40, C2, White British, Child 16+, LGBTQ+, Rural Wales

In particular, people experiencing energy-limiting chronic illnesses (ELCI) or disabilities[80] (for example, Long Covid or ME/CFS)[81] faced pronounced barriers to eating well, often needing to sacrifice their nutritional ideals to preserve their energy. This group might be particularly important for food policy-makers to be mindful of given the substantial percentage of people with covid that go on to develop energy-limiting chronic illness.[82]

Preparing food from scratch - in theory, a helpful way to meet bespoke dietary needs and to manage food budgets - took time and energy these participants simply didn't have. Participants in this group thus faced the dilemma of spending the little energy they have on preparing food that suited their needs or eating convenience foods such as pre-chopped foods or ready meals. However, their options felt unsatisfactory on one or more levels: more expensive, more processed, less fresh, and more likely to contain allergens like dairy or gluten. Some reported skipping meals due to feeling too unwell to shop or cook.

6.3.2 Parents felt under pressure to provide healthy food and unsupported in doing so

Many parents in this research felt our current systems do not support them well enough to provide healthy food for their families. Many expressed frustration about 'unhealthy' foods being marketed to children and young people; about the additional difficulty of navigating 'misleading' marketing as a busy parent; and the perceived absence of effective food education in schools.

> "I put off buying healthy foods such as avocados because I always think I could use that extra money to buy the kids a treat or I can buy another box of meat which would make another meal for my family. It's simple, healthy food should be made more affordable to those that have to budget." F, 30, C2, Pakistani, Children under 8, Asthma, Suburban Wales

6.4 Summary actions: representing and protecting people's interests around health and nutrition.

6.4.1 Future focus

As explored in more depth in Ch 2, ensuring the affordability of healthy food was the public's core concern in this space - in line with concerns about the negative impacts of rising financial pressures and rising food prices more generally. We also saw a level of mistrust from participants that foods labelled as healthy options may be harmful in other ways.[83]

Although not featuring in the quantitative survey results, participants in the qualitative research were eager for more action to be taken on food marketing aimed at young people, and for support to help their children establish good habits early. There was also a sense that future guidance needed to be more 'up to date' and tailored in terms of helping navigate modern life pressures and barriers to healthy eating.

6.4.2 Action areas for the regulator[84]

People wanted action taken to represent and protect their interests in this space. Welsh people's main priority for the FSA was to ensure food health claims genuinely deliver a healthier choice.

However, in qualitative research there was a sense of frustration and powerlessness about this issue, with people feeling unsure whether the FSA or their partners would have any power over issues like these, where drivers of supply and demand became complicated.

The first column below shows the action areas in priority order of mentions

FSA	England, Wales and Northern Ireland	Wales
1	Ensure food labelled as 'healthier option' is genuinely healthier for you (51%)	Ensure food labelled as 'healthier option' is genuinely healthier for you (52%)
2	Give more clarity on fat, salt and sugar content in food products (38%)	Give more clarity on fat, salt and sugar content in food products (37%)
3	Develop a simpler, consistent system across stores to label health information on packs (37%)	Provide clear guidance on how to make healthy choices on a budget (36%)
4	Provide clear guidance on how to make healthy choices on a budget (36%)	Create a single score to show on food packaging how nutritious the product is (35%)
5	Create a single score to show on food packaging how nutritious the product is (34%)	Provide clear guidance on the health impact of processed foods (35%)
6	Provide clear guidance on the health impact of processed foods (32%)	Develop a simpler, consistent system across stores to label health information on packs (33%)
-	Only 8% did not want the FSA to take any action in this policy area.	Only 8% did not want the FSA to take any action in this policy area.

Chapter 7: Priority next steps

Medium-term actions for government, industry and the FSA

This chapter focuses on what people in Wales saw as the priorities for the future of food in the UK over the next 3 years. It summarises what people saw as important to them as individual decision-makers in the food system, and how this related to what they would like the wider government and industry to prioritise.

7.1 Summary of interests the public want protected

The public expressed their wider interests across a range of topics concerning the future of food over the next three years. These topics were presented in a randomised list derived from discussions held at the qualitative stage and categorised into themes at the analysis stage. From these, they also selected up to 3 topics they felt were the most important to them. An index was calculated to measure the strength of interest - this showed the proportion of people who expressed an interest in a topic and who then also selected it as one of their 'most important' area of interest[85]. While the baseline measure of interest gives a clear measure of the reach of a particular topic, the strength of interest index provides an important indication of prioritisation for the public.

All four of the 'wider interest' issue areas identified in the qualitative research and explored in more depth in the quantitative research were shown as important to the UK public. As outlined previously, ranking these in strict priority order is difficult if not impossible. Public priorities varied even within the same person depending on whether taking the perspective of priorities *right now* or *for my future* - and more tangible 'actions' often attracted greater support than more abstract ones, even for issues that people had otherwise ranked as very high priority for them.

However, the key areas of interest for the public, as detailed in the earlier chapters of this report, are roughly ranked as follows (see Appendix A for fuller data tables) - drawing on a combination of qualitative rankings and prioritisations; quantitative issue prioritisations and strength of response within these and so on. As seen throughout this report, there was also a lot of commonality in these overall priorities between people across the four nations - and the priorities in Wales generally reflected those of the UK as a whole.[86]

1. **Supporting equitable access to safe, affordable food.** The public want to see Government action to ensure that everyone can access healthy food at affordable prices - and access to low-priced food that is not over-processed and meets good quality standards. This issue was most highly-rated across all future actions areas in the quantitative research, and qualitatively seen as cutting across all other 'wider interests' and concerns: if you can't afford to eat in a safe and healthy way, the other actions taken on your behalf fade in importance in comparison.

2. **Ensuring high standards of food safety and hygiene:** although people trust current standards, they want the level of play in the food chain to remain high in future as the UK food trade evolves. Ensuring 'high standards across the food chain' was the second-highest interest area in quantitative research, and consistently the highest-rated interest area in qualitative research.

3. **Ensuring ethical, sustainable food systems:** People want decision-makers to ensure that our food systems feel fair, ethical and sustainable. A big 'flashpoint' for people is the need to reduce food waste in the food chain; but this complex topic also links to supporting British provenance and ensuring safe and ethical treatment of animals in the food chain, As discussed in earlier chapters, provenance and animal treatment cut across both environmental concerns (lower transport, lower pollution, avoiding intensive animal farming

and its perceived negative impact on nature) and safety concerns (more control of quality standards, food inspection, clarity of labelling, more trust that safety standards and food hygiene have been respected).

4. **Supporting easier choice-making around health and nutrition:** As above, the public's primary interests in this space were around equitable access to healthy, affordable, fresh food. However, there was also substantial interest in supporting the public to more easily make healthy, nutritious choices - particularly amongst lower-income participants and other disadvantaged groups who were more likely to report low-trust and feeling 'misled' or confused by food information and marketing. Quantitatively, ensuring clear information is provided about the food people eat; ensuring foods labelled 'healthy' actually are; and providing guidance to make healthy food choices more easily were top interest areas for future action.

7.2 Priority actions for Government and industry

Using the same list of topics, respondents also indicated the issues they wanted the Government[87] and the food industry to prioritise in the next three years. In both cases respondents were asked to select up to 3 issues.

There was a lot of commonality in people's priorities for government and industry, with the same patterns observed overall in the UK,[88] as well as across England, Wales and Northern Ireland on the one hand and Scotland on the other.

This suggested an expectation that Government and food businesses should work together as part of a common framework. This fits a landscape where both parties are seen as not currently protecting public interests: to address public interests in the future, both need to be involved in taking action.

7.2.1 Public priorities for Government

Across all areas of interests, public priorities in Wales for Government were, in order of interest:

1. Support for British farmers and producers/fewer imports
2. Access to healthy food products at affordable prices
3. Access to low-priced food that is not over-processed and meets good quality standards
4. High standards of food safety and hygiene across the food chain
5. Reducing food waste in the food chain

7.2.2 Public priorities for the food industry

Across all areas of interests, public priorities in Wales for the food industry were, in order of interest:

1. Providing access to healthy food products at affordable prices
2. Support for British farmers and producers/fewer imports
   (significantly higher than the UK as a whole)
3. Access to low-priced food that is not over-processed and meets good quality standards
4. Reducing food waste in the food chain
5. High standards of food safety and hygiene across the food chain

Link to main UK Technical Appendix with full data tables for the above.

Endnotes

1. Food Standards Agency. Social Science. Gov.uk.
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6. Davies B et al. Changes in political trust in Britain during the COVID-19 pandemic in 2020: integrated public opinion evidence and implications. Humanities and Social Sciences Communications. 2021; 8(166); Edelman. 2022 Edelman UK Trust Barometer; Carnegie UK. Lack of trust in politics threatens democracy: New report and poll. Collective Wellbeing Carnegie UK. 2022; Kings College London. Trust in government fell in second year of Covid – but public still receptive to obeying rules that restrict freedoms. 2022.
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10. Office for National Statistics. Energy prices and their effect on households. February 2022.
11. Woodcock A. Trust in UK politicians hits all-time low in wake of sleaze scandal. Independant. 2021.
12. Henley J. Food shortages hitting Britons more than many in EU, poll finds. The Guardian. December 2021; Munbodh E. Families warned food shortages in UK 'inevitable' this summer due to lack of staff. The Mirror. June 2021; Food Standards Agency, Ipsos Mori. Consumer Insights Tracker. November 2021.
13. Lasko-Skinner R, Sweetland J. Food in a Pandemic. From Renew Normal: The People's Commission on Life After Covid-19. Demos. 2020: 57.
14. Food Standards Agency, TNS BMRB. Our Food Future. Food Standards Agency, Food Standards Scotland, Sciencewise. 2016.
15. As noted in the FSA's Transparency report in 2019: "Participants believed that the strength of the UK food system relies on the cooperation of various stakeholders. Food businesses (farmers, producers, manufacturer, and retailers), Government (local, regional and national), regulators, consumers, and others (the third sector, the media etc.) all have a role to play in protecting the consumer, as participants felt no single body has a full view of the whole food system."
16. Based on self-classification at question S6. 'Which of the following best describes the area you live in?' - see Technical Appendix for questionnaire
17. For example, in 2019, 73% of respondents (of those who were aware of FSA) reported trusting the FSA to do its job. Food Standards Agency. Public Attitudes Tracker. Food Standards Agency & Government Statistical Service. February 2020.
18. QX2. Which, if any, of the following have you experienced in relation to food in the past 12 months? - 33% selected "None", 67% selected one or more changes of behaviour.
19. See Chapter 1 and the Technical Report for more information about how this measure was calculated. Definition of food insecurity aligned with USDA measures:

Healthypeople.gov. Food Insecurity. Office of Disease Prevention and Health Promotion.
20. Here and elsewhere when reporting 'concerns over the future of food', reported percentages combine 'Extremely concerned' and 'Quite concerned' responses.
21. Q20b. Which of these issues would you want the food industry (e.g., retailers, food producers and suppliers) to prioritise in the next 3 years? Maximum 3 issues selected. 34% selected as a top-3 issue.
22. Q20b. Which of these issues would you want the Government to prioritise in the next 3 years? Maximum 3 issues selected. 34% select as a top-3 issue.
23. Here and elsewhere when reporting agreement, reported percentages combine 'Agree strongly' and 'Agree slightly' response.
24. The FSA and FSS missions and remits differ - with the FSS holding much more responsibility around the promotion of public health via healthy eating.
25. FSA Research Evidence Database: This includes deep deliberative investigation of informed public views; innovative behaviour science and consumer psychology research; longitudinal tracking data of consumer behaviours, needs and views; and rapid response data on public needs in times of crisis.
26. TNS BMRB, Harris Interactive. Consumer research to inform the development of the FSA strategy 2015-2020. Food Standards Agency. 2014.
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31. Food Standards Agency, Ipsos Mori. Consumer Insights Tracker. November 2021.

32. Caddick D, Sterling A. HALF OF UK FAMILIES ARE £110 WORSE OFF A YEAR SINCE 2019 GENERAL ELECTION. New Economics Foundation. December 2021.
33. Office for National Statistics. Consumer price inflation, UK: December 2021. January 2022.
34. See for example Jack Monroe's recent Twitter thread exploring their lived impact of low-budget food price rises. Monroe J, @bootstrapcook. Twitter thread on cost of living & cost of inflation. January 2022. The Office of National Statistics (ONS) will be adjusting the way it tracks inflation for low-income families to reflect these kinds of disparities.
35. The Trussell Trust. End of Year Stats. December 2021.
36. Food Standards Agency, Ipsos Mori, Bright Harbour. The COVID-19 consumer research. Food Standards Agency. July 2021.
37. Food Standards Agency, Ipsos Mori. Consumer Insights Tracker. November 2021.
38. For example, during the qualitative research it became clear that concepts like 'trust and transparency' or 'regulation and communications' were deemed as lenses through which to view other issue areas - rather than areas of focus in their own right.
39. 16 key documents were reviewed and implications for our method, sample and materials were mapped, to ensure we built on existing data instead of repeating it.
40. 8 UK people reviewed the development of our approach and materials and vetted our participant care approach throughout the project lifecycle. The board included a mix of life-stages, ages, genders, ethnicities and household incomes. After a project onboarding session, we engaged with the board through a mixture of reviewing periods, group feedback sessions and 1-1 interviews. This helped us ensure the public had the opportunity to shape not just our findings, but our approach and questions for the research.
41. Our academic partner provided general support throughout the project design process, and reviewed and consulted on key materials and outputs (e.g. survey design, interim findings, food security investigations and final reporting). In particular, support was provided in terms of developing our bespoke food insecurity measure,

adapting USDA measures to also capture 'softer' measures of financial pressure and insecurity.

42. Fieldwork was conducted between 15th November and 17th December 2021. In total, the qualitative findings in this report were built from consumer data from a total of 218 completed online tasks and 60 hours of group workshop and depth interview data.

43. USDA Economic Research Service. Survey Tools: Six-Item Short Form of the Food Security Survey Module. United States Department of Agriculture.

44. In response to: ' I am financially comfortable and can afford to buy things I want without worrying about the cost': 44% disagree (vs. 39% UK average), 36% agree (vs. 40% UK average), with the remainder saying they 'neither agree nor disagree'.

45. Food Standards Agency & TNS BMRB. Our Food Future. Food Standards Agency. 2016; Food Standards Agency. Food we can trust: Food Standards Agency Strategic Plan 2015-20. Food Standards Agency. April 2015

46. We have applied USDA definitions in this research when using the terms 'low' or 'very low' food security. Low food security: "Reports of reduced quality, variety, or desirability of diet. Little or no indication of reduced food intake." Very low food security: "Reports of multiple indications of disrupted eating patterns and reduced food intake." See USDA Economic Research Service. Definitions of Food Security. United States Department of Agriculture. for more detail about these definitions.

47. Festinger's 'cognitive dissonance' describes the feeling of discomfort we experience when we hold two conflicting thoughts, or when our behaviours and thoughts are out of alignment. This sense of discomfort often drives us to change our views or behaviour to promote alignment. However, in the case of food choices often there is no 'change' that can be made given price and other constraints - leading to sustained discomfort.

48. QX2. Which, if any, of the following have you experienced in relation to food in the past 12 months? - 33% (vs. 35% UK average) selected "None", 67% (vs. 65% UK average) selected one or more changes of behaviour. This included being unable to

buy food due to lack of money, cutting meal sizes and swapping from branded to cheaper alternative products.

49. See the following research from the Food Standards Agency: Food Standards Agency & Ipsos Mori. Consumer insights tracker. Food Standards Agency. November 2021; Ipsos Mori. Food and You 2 - Wave 2. Food Standards Agency. July 2021; Food Standards Agency, Ipsos Mori, Bright Harbour. The COVID-19 consumer research. Food Standards Agency. July 2021.

50. Connors C, Malan, L, Canavan S, Sissoko F, Carmo M, Sheppard C, Cook F. The lived experience of food insecurity under Covid-19. Bright Harbour and Food Standards Agency. 2020.

51. Bespoke food security classification model - see Technical Appendix

52. Based on responses to 'Qx2. Which, if any, of the following have you experienced in relation to food in the past 12 months?'

53. In the analysis detailed here, the term 'food secure' is used to describe collectively those people classified as having marginal food security, being at risk of insecurity or fully secure.

54. QX2. Which, if any, of the following have you experienced in relation to food in the past 12 months? - 26% (vs. 35% UK average) selected "None", 74% (vs. 65% UK average) selected one or more changes of behaviour. This included being unable to buy food due to lack of money, cutting meal sizes and swapping from branded to cheaper alternative products.

55. Based on responses to 'Q14b. Which do you trust for information about food (even if you don't use it for information at present)? (In Scotland: The Scottish Government / In Wales: The Welsh Government / In NI: The Northern Ireland Government)

56. 15% in England, 9% in Wales, 9% in Northern Ireland, 13% in Scotland.

57. Lasko-Skinner R, Sweetland J. Food in a Pandemic. From Renew Normal: The People's Commission on Life After Covid-19. Demos. 2020: 57.

58. As indicated earlier, 65% have modified their food buying behaviour in the last 12 months as a result of worries over money / finance.

59. See detailed data in Appendix A for Total UK, England/Wales/Northern Ireland combined, and Scotland.

60. Food Standards Agency, TNS BMRB. Messaging for food safety communications. Food Standards Agency. May 2014; Food Standards Agency, Kantar Public. Consumer perception of food risk. Food Standards Agency. 2021.

61. Food Standards Agency, Ipsos Mori, Bright Harbour. The COVID-19 consumer research. Food Standards Agency. July 2021.

62. These 8 factors were: Food safety and hygiene; Health and nutrition; Environment and animal welfare; Price / Value; Quality; Convenience and ease; Local provenance; 'Ethics and workers welfare. Each factor was accompanied by a short description on-screen, please see Technical Appendix for more detail.

63. Community Research & 2CV. Trust in a Changing World. Food Standards Agency. 2018; Kantar Public. Consumer Perceptions of Food Risks. Food Standards Agency. 2017

64. 77% (vs. 78% UK average) agree strongly or agree slightly with: "I trust that the places I eat or buy from are handling food safely and hygienically" (N.B. If we include those saying "Neither agree nor disagree", the proportion is 94% (vs. 95% UK average).

65. 79% (same as UK average) agree strongly or agree slightly with: "I trust that the foods sold in shops are made and stored according to good food safety standards" (N.B. if we include those saying "Neither agree nor disagree", the proportion is 95% (vs. 94% UK average) - this is similar to the 90% of people in Food And You 3 who were "very" or "fairly" confident that "the food you buy is safe to eat"); Ipsos Mori. Food and You 2 - Wave 3. Food Standards Agency. January 2022.

66. Community Research & 2CV. Trust in a Changing World. Food Standards Agency. 2018.

67. Food Standards Agency, TNS BMRB. Our Food Future. Food Standards Agency, Food Standards Scotland, Sciencewise. 2016.

68. See detailed data in Appendix A for Total UK, England/Wales/Northern Ireland combined, and Scotland.

69. All figures cited in this paragraph are based on the proportion of people who agree strongly or agree slightly with the statements mentioned.
70. Based on % people reporting being 'extremely concerned' or 'quite concerned' about the impact of climate change on food production.
71. Proportion who agree strongly or agree slightly with 'I feel that profit has become more important to the food industry than people's needs'.
72. Proportion who agree strongly or agree slightly with 'I find it unacceptable to throw food away at home'.
73. Proportion who agree strongly or agree slightly with 'I try to reduce or avoid food products that create plastic waste''.
74. Based on responses to 'Q19a. Thinking about the next 3 years, which of these issues, if any, do you see as important to you for the future of food?'
75. See detailed data in Appendix A for Total UK, England/Wales/Northern Ireland combined, and Scotland.
76. Proportion who agree strongly or agree slightly with 'I avoid buying foods that contain ingredients such as trans fats / palm oil / preservatives / E numbers'.
77. Proportion who agree strongly or agree slightly with 'I feel supermarkets encourage me to buy unhealthy foods'
78. Proportion who agree strongly or agree slightly with 'I often feel that foods labelled as 'healthier options' (e.g., low fat, low sugar, plant-based meat alternatives) are unhealthy in other ways'
79. All based on proportion who agree strongly or agree slightly with these dimensions.
80. See Chronic Illness Inclusion for more information.
81. Myalgic Encephalomyelitis or Chronic Fatigue Syndrome
82. See for example Kedor C et al. Chronic COVID-19 Syndrome and Chronic Fatigue Syndrome (ME/CFS) following the first pandemic wave in Germany - a first analysis of a prospective observational study. Cold Spring Harbor Laboratory Press. February 2021; Davis H et al. Characterizing long COVID in an international cohort: 7 months of symptoms and their impact. eClinicalMedicine. 2021; 38; Wong T &

Weitzer D. Long COVID and Myalgic Encephalomyelitis/Chronic Fatigue Syndrome (ME/CFS)—A Systemic Review and Comparison of Clinical Presentation and Symptomatology. Medicina. 2021; 57(5): 418.

83. 61% agree with 'I often feel that foods labelled as 'healthier options' (e.g. low fat, low sugar, plant-based meat alternatives) are unhealthy in other ways'.

84. See detailed data in Appendix A for Total UK, England/Wales/Northern Ireland combined, and Scotland.

85. Index calculation: (% people selecting a topic in top 3 at Q19b)/(% people expressing an interest in this topic at all at Q19a)

86. See detailed UK figures in Appendix A: Table 1; EWNI figures in Table 2; Scotland figures in Table 3.

87. "Government" was intentionally not defined further, as the purpose was to establish what people saw as falling broadly under the remit of the state (whatever the level or agency involved) versus the remit of private industry.

88. See detailed UK figures in Table 1; EWNI figures in Table 2; Scotland figures in Table 3.