

FSA Strategy 2015-2020

TNS BMRB report

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Executive Summary

The FSA have a responsibility to represent consumer interests in their policy; when developing their strategy for 2015-2020, the FSA therefore commissioned a multi-method iterative research programme to understand consumers' concerns in relation to food. The FSA was keen to understand consumer interests both within their current remit (i.e. relating to food safety) and outside of this. Therefore a comprehensive list of consumer concerns was compiled, based on a review of past research including the Food and You survey; the FSA's Biannual Tracker survey and previous Citizens' Forums. A national omnibus survey captured strength of feeling in relation to each of these issues. This was followed by 10 Citizens' Forums across England, Northern Ireland and Wales, which are reported here. The Citizens' Forums used reconvened focus groups to explore consumers' interests in depth and enable consumers to deliberate on complex or challenging issues. The forums had three key aims:

1. Establish, explore and prioritise consumer concerns in relation to food – including food safety but also other interests raised by consumers (e.g., food price healthy eating; trust in the food industry; food chain management, etc.);
2. Explore and challenge consumer expectations regarding the FSA's/ Government's responsibilities for safeguarding consumer interests in relation to food – including any variations from the FSA's current remit and strategic priorities; and
3. Reflect on how consumer interests and concerns are changing, potential influencing factors, and any implications for the FSA's strategy and priorities from 2015-2020

Consumer Values and Expectations

The food choices consumers made were increasingly at odds with their values in relation to food. Although consumers believed that fresh produce prepared from scratch was inherently 'good', they increasingly chose processed foods, despite concerns that these foods contained potentially harmful chemicals and additives.

Consumers wanted the Government to intervene to create a fair choice between processed foods and *natural* home cooking. Although consumers recognised that their choices ultimately created demand for processed foods, they believed that large manufacturers and retailers actively promoted these choices through packaging, pricing and marketing of processed foods. Participants therefore advocated a combination of interventions including governance of the

food industry, to combat practices designed to encourage poor food choices (e.g. misleading packaging) and communications to cut through contradictory messages about healthy eating.

Priority areas of concerns

Through the quantitative survey and the focus groups, four areas of concern emerged as priorities for participants: affordability; healthy eating; fraud and food safety:

Affordability and healthy eating: Healthy foods including fresh meat and fish, nuts and certain fruit and vegetables were not considered affordable for everyone. Media coverage of the recession, rising cost of living and use of food banks reinforced participants' beliefs that the cost of maintaining a healthy diet was beyond many people's means. Contradictory messaging and marketing of food also compounded confusion around making healthy choices - for example low fat yogurts and diet products claimed to be healthy but contained high levels of sugar and / or chemicals.

Some argued that it was possible to maintain a good diet on a budget by making smart choices, for example buying cheaper cuts of meat, freezing and reusing leftovers. However, there was a perception that many people had lost necessary cooking skills to plan home cooked meals on a budget and that busy lifestyles meant consumers no longer had time to cook from scratch or seek out cheaper ingredients.

Consumers wanted Government / FSA to ensure there was a 'fair' choice between fresh and processed foods by making healthy meals appear comparable in terms of price and convenience. This required up-skilling the public on preparing healthy meals on a budget through community courses and home economics in schools. Participants also advocated direct intervention on pricing (e.g. taxing unhealthy foods) as they believed consumers were largely motivated by budget considerations. However, this was a divisive issue, with many participants strongly opposed to any intervention which increased the overall price of food given that consumers were currently struggling to deal with rising food costs.

Safe and Hygienic Food: Discussion of food safety was not restricted to food hygiene risk, consumers were in fact more concerned about possible long term harm that may be caused by chemicals in food (e.g. additives, preservatives, hormones and medication used in intensive farming) and increased consumption of processed foods.

Consumers believed they knew how to handle food safely when eating at home and could minimise risk when eating out by avoiding outlets which looked dirty, eating at places that were recommended or where they had eaten before. Some participants also mentioned FHRS as a quick and easy visual cue to make safe choices when eating out.

The potential long-term effects of consuming chemicals and additives used in processed foods were more salient to consumers. Many believed that levels of cancer and allergies were increasing due to dietary changes and that the long term consequences of modern food production processes would only come to light when it was 'already too late' i.e. when the effects had become widespread in the public.

Consumers expected stringent food safety and hygiene regulation backed up by regular inspections and heavy fines or prison sentences. Stringent enforcement would both drive standards and reassure consumers that regulation was robust enough to protect the public. There was considerable interest in the use of labelling to flag high levels of potentially 'harmful' chemicals in food to encourage consumers to think more carefully about the amount of processed food in their diet – in the same way that traffic light labelling raised awareness of high fat, salt and sugar content. Finally, the FSA had a responsibility to ensure consumers knew how to prepare food safely and there was a perception that the loss of cooking skills may lead to unsafe practices amongst less experienced or confident cooks at home.

Fraud and Authenticity: Press coverage of the horsemeat scandal highlighted to consumers that they knew very little about where food came from and that a lack of transparency around food production allowed the food industry to adopt deceptive practices. Discussion of fraud was not solely focussed on illegal activities; consumers discussed a range of practices which they considered deceptive including using filler and water to increase the weight of products, using a British flag on imported produce that has been packaged in the UK; using sell by dates to encourage consumers to throw away food and buy more; and using jargon and small print to hide unhealthy ingredients including high levels of salt and sugar.

Consumers wanted the Government to increase transparency by making rules about how food is labelled including ensuring manufacturers use familiar terminology, visual markers to flag high levels of chemicals and restrictions on the use of 'natural' imagery to sell processed foods.

Secondary areas of concern

Secondary issues such as the environmental impact of food production, animal welfare, availability of food and food technology were considered important but were less influential on everyday food choices. Although consumers thought it was important that food production was ethical and sustainable, making ethical choices was considered unaffordable for many and therefore only a few 'champions' raised these as priority areas of concern. Nonetheless, the following concerns were raised:

- **Environmental impact of food production:** Consumers recognised that intensive farming methods, importing exotic foods, food waste and food packaging may be harmful but that habit and marketing made it easy for consumers to make choices

without thinking about the impact on the environment. Consumers wanted better oversight of food production and farming to minimise the environmental impact of intensive farming and food manufacturing, a tax on food miles and subsidies for locally produced food to shift behaviours around buying local and seasonal produce.

- **Animal Welfare:** Consumers became increasingly concerned about animal welfare over the two waves as they linked poor welfare standards with disease which could travel up the food chain. Consumers believed the Government had a responsibility to ensure minimum standards were maintained and there was transparency about how animals were reared. However, blanket interventions to improve welfare standards across all meat was not considered appropriate as consumers should have a choice based on affordability and their own ethical beliefs.
- **Food technology:** Discussion of food technology was divisive, with many participants admitting they knew very little about how technology was used in food production. A few believed that food technology may have potential benefits in the future, by increasing the amount of food produced. However, consumers were concerned about safety and reacted negatively to practices which moved away from 'natural' food production processes. It was therefore considered vital that thorough testing was carried out before any commercial use of new production technologies.
- **Availability of food:** Food security was not a top of mind concern; rather consumers were worried about excessive choice which they believed was encouraging irresponsible choices (e.g. demand for foods out of season and waste.) Participants were concerned about the impact of intensive farming and cheap imported food on the UK farmers and therefore wanted the Government / FSA to do more to protect UK farming industry.

Consumers believed that large retailers were forcing significant changes in the food chain, for example by driving down costs to a point that small local producers cannot compete.

Encouraging consumers to buy more local produce was also considered a key mechanism to promote sustainability and therefore participants suggested marketing and subsidising of local produce. Participants recognised that consumer purchasing behaviour was shaping the market and therefore communications was considered important to encourage consumers to think about the choices they made.

Conclusions

Consumers lacked trust in the food industry and were concerned about deceptive practices used to sell food. Consumers expected the Government / the FSA to champion their interests, although they had limited awareness of what the Government / FSA already did to protect them - they were therefore eager for greater visibility of Government intervention.

There was strong support for heavy prison sentences and fines to act as a deterrent and reassure consumers that oversight of the food industry was sufficiently robust, particularly in the aftermath of the horsemeat scandal which had significantly undermined trust.

Consumers wanted a range of interventions including direct intervention to promote better choices e.g. via pricing or restrictions on production practices as well as communications to counteract deceptive marketing of 'bad' (i.e. processed) foods. There was strong support for point of choice interventions such as food mile labelling and traffic light labelling of 'unnatural' additives to interrupt habitual food choices.

Safeguarding the future of food was also considered a priority for the Government; in particular, consumers were concerned that food production and the food chain should not become so complex that it becomes impossible to access natural, local food without a price premium.

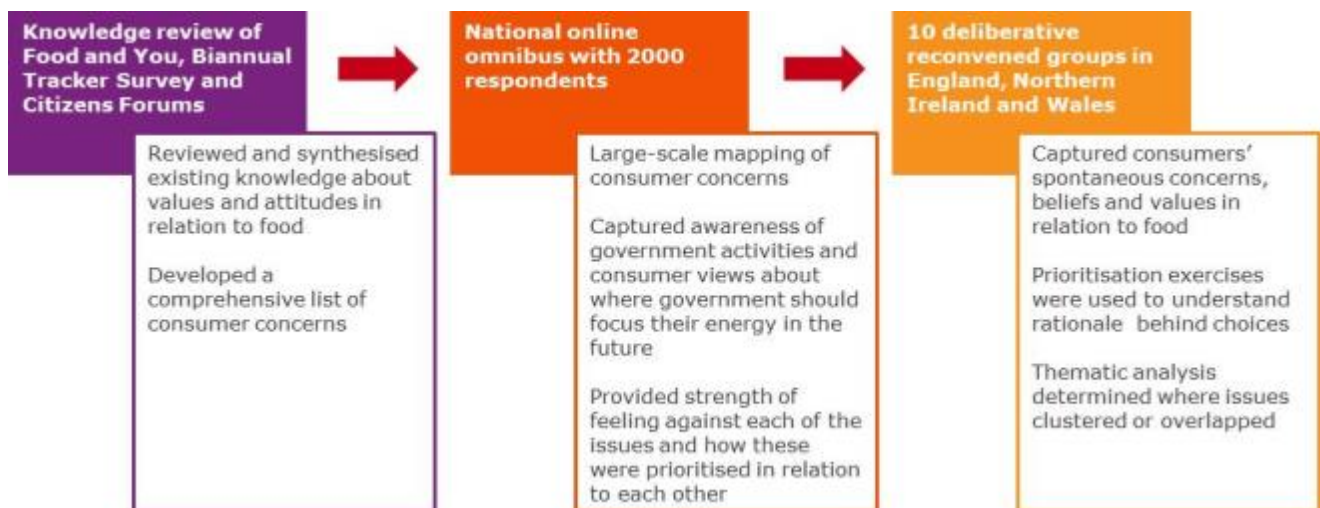
1. Introduction

1.1 Research Background

This research was commissioned to inform the development of the Food Standards Agency (FSA) strategic plan for 2015-2020. The FSA has a responsibility to place consumer interests at the heart of policy making. Its current remit has a number of broad objectives for maintaining food safety standards – ensuring that: food producers and caterers prioritise consumer safety; that imported food is safe to eat; consumers have the information and understanding required to make informed choices; food is safe to eat; and business compliance is supported in order to ensure consumer protection.

To inform its strategic planning, the FSA wanted to gather up-to-date understanding of consumer concerns in relation to food – as well as consumer expectations for how the Government should protect their interests. Importantly, the FSA wanted to understand the full range of consumer concerns, without limiting discussion to the issues or activities which fall within their current remit.

To achieve this, the FSA engaged in multi-method, iterative research to understand the consumer context around food issues – of which the research reported here is part. The various stages and aims of the FSA's overarching research process are summarised as follows.



This iterative process ensured that the FSA drew on what it knew already about consumers' interests and concerns, while enabling more exploratory and consumer-driven definition of key issues. Each stage of the process is described briefly below. The remainder of this report then

focuses on the final stage of the research – the qualitative, deliberative research conducted by TNS BMRB.

Knowledge Review

First, the FSA engaged in a knowledge audit via a review of existing evidence – from the Biannual Tracker, Food and You surveys, and previous Citizens' Forum research. This stage of research clearly evidenced a wide range of consumer concerns and interests in relation to food– some of which go beyond the FSA's current remit. From this review, a comprehensive list of issues was compiled which was used as a starting point for this research (see chapter 3 – priority areas of concern) Findings from previous forums are referenced throughout this report, where these are consistent with or relevant to findings from this research.

However, this early stage of research could not provide direct evidence against up-to date prioritisation and contrasting of issues – to understand which are currently the most crucial from the consumer perspective. A robust sample was also required to ensure capture of representative consumer views.

Online survey research

The list of consumer concerns was further explored via online survey testing conducted by Harris Interactive. The survey was conducted via an online omnibus approach, with a representative sample of 2060 consumers. This provided scaled-up data on customer prioritisation of concerns, and initial indications of consumer expectations about Government's responsibilities in acting upon these. A summary of key findings is presented in Section 3.1, below. The full report of survey findings are available at: www.food.gov.uk

Qualitative Citizens Forums research

Finally, the FSA commissioned qualitative, deliberative research – via 10 Citizens Forums held across the England, Northern Ireland and Wales - to provide depth of insight on the consumer context. The aim of the Citizens Forum element of research was to understand how the range of issues identified played out in peoples' day-to-day lives, how they interpreted and experienced each of these, and where consumers thought that Government priorities lay for the future.

Whilst the intention was to inform the FSA's strategic thinking and planning, these forums were not designed to provide recommendations per se on the FSA's future strategy. Instead, the qualitative research focused on understanding *why* consumers held the views identified in previous research stages – providing insight about the beliefs and values underpinning responses observed in the survey and other previous research. It also aimed to capture any

additional issues or concerns not yet surfaced by other research methods, to ensure these were considered alongside other known concerns.

1.2 Specific aims and objectives of the Citizens Forums research

Across the above overarching aims, the specific objectives of the research were to:

4. Establish, explore and prioritise consumer concerns in relation to food – including food safety but also other interests raised by consumers (e.g., food price; healthy eating; trust in the food industry; food chain management, etc.);
5. Explore and challenge consumer expectations regarding the FSA's/ Government's responsibilities for safeguarding consumer interests in relation to food – including any variations from the FSA's current remit and strategic priorities; and
6. Reflect on how consumer interests and concerns are changing, potential influencing factors, and any implications for the FSA's strategy and priorities from 2015-2020

1.3 Methodology

This research comprised ten Citizens' Forums – reconvened over two Waves – in five locations across England, Wales and Northern Ireland. Each Citizens Forum lasted for 90 minutes, and involved 10 participants, for a total of 100 participants overall. Fieldwork was conducted by TNS BMRB from 10th February – 14th March 2014.

The Citizens Forums used a deliberative approach, ensuring that consumers had the time and space to discuss, debate, and reflect on a wide variety of issues and concerns in relation to food. In each wave, moderators used interactive exercises to encourage participant to engage with the issues.

Wave 1 sessions focused on:

- providing a brief introductory mapping of consumer priorities and interests in relation to food;
- introduction of consumer concerns as evidenced through quantitative research; the gathering of participants' responses to this (e.g., why the public might have expressed the concerns they did; what each area meant to them);
- whether the data 'fit' with their own experience; and
- initial discussion on consumers' views about what issues the FSA/Government should prioritise in terms of safeguarding consumer interests.

Reflection and homework: Between Wave 1 and Wave 2 participants were asked to collect images and video to illustrate how the issues discussed impacted their day to day lives. (See Appendix 2 for examples of materials produced).

Wave 2 research extended and refined findings around what consumers thought the key priority issues were – after having reflected about how various issues played out in their own personal context – and what the Government should be responsible for in safeguarding consumer interests. The depth of discussion on each issue was dictated by the strength of feeling participants expressed. In this sense, consumers were allowed to take the lead with regards to topic coverage. To enable prioritisation, sessions included an interactive ‘mock town hall meeting’ scenario. Consumers were asked to decide what issues were most important for them to take action on, to develop a spending plan, and then debate their plans in two opposing ‘parties.’ This allowed for in depth discussion of peoples reasoning in a fun and interactive way, ensuring greater consideration and ‘reality testing’ of consumer views.

Data capture: The Citizens Forums were digitally recorded and analysed with TNS BMRB’s matrix mapping approach, drawing on elements of Grounded Theory analysis. This robust analysis method allows researchers to draw out the diversity of opinions as well as identify common themes across discussions (see Appendix B for a more detailed description). Video footage was also collected in both Waves of research via recorded group discussions and through ‘vox pop’ interviews. This footage was used to develop standalone summary videos illustrating key themes from the research, provided separately for internal dissemination in the FSA.

1.3.1 Sampling and recruitment

The Citizens’ Forums took place in Aberystwyth, Birmingham, Leeds, London and Newtownabbey, with two Forums held in each location. Participants were recruited using free-find methods using a screening questionnaire developed in agreement with the FSA.

Deliberative research aims to capture a wide range of views – rather than seeking to achieve a representative sample. Groups were split by SEG (ABC1 versus C2DE) (see appendix 1 for full description of the sampling frame), as previous Citizens’ Forum research had surfaced clear income-related differences in views and circumstances regarding food choices. Groups were also recruited to include a mix of:

- **Gender** – roughly equal ratio of male and female
- **Age** – a range reflecting the local population
- **Ethnicity** – include mix of ethnicities in each group (approx. 10% of total sample)
- **Rural / urban** – recruit a range to reflect local and surrounding area

2. Consumer values and expectations

In this section, we discuss overarching consumer values and concerns in relation to food expressed during the Citizens Forums which informed responses to a variety of specific issues and concerns. We go on to consider how these views broadly influenced their expectations of Government and the types of interventions consumers wanted Government to employ to safeguard consumer interests at an industry level.

2.1 Consumer values versus consumer choice

Before providing detail on specific areas of concern for consumers explored in this research, it is important to understand their emotional starting point – that is, the overarching beliefs and values which underpin consumer considerations around food.

MY VALUES



Food is a fundamentally personal and emotional issue for consumers, and this was reflected in Forum discussions. Consumers discussed food as deeply tied to their own and their families' **health and wellbeing**. They expressed a need to know the food they were eating was *safe* – but were also keenly interested in whether food was *nourishing*.

Alongside this, there was a core belief that 'natural' food was healthier, safer and of higher quality – and 'processed' food was unhealthy, potentially unsafe and low quality. This tied to considerations about food preparation and production processes.

Home-cooking raised associations with family and parenthood, with participants talking nostalgically about home-cooked meals their mothers had made for them. Cooking from scratch at home was also preferred as participants believed this ensured better understanding of and more control over what was in the food they ate.

Conversely, packaged and pre-prepared foods were viewed with more suspicion – and consumers expressed concerns about how the foods they ate might harm them – particularly foods which contained ingredients or additives which were considered unhealthy or potentially harmful. Furthermore, consumers believed that changes to diet, in particular increasing consumption of processed foods, were leading to a rise in health problems including diabetes and heart disease. Processed food was viewed as not particularly nourishing, but also suspect in terms of safety; consumers worried much more about the long-term implications of

chemicals and additives than they did short-term safety issues such as hygiene or chemical contamination.

“Everything that’s manmade has got crap in it. It’s got salt, sugar, preservatives and starch in it. If you eat naturally then you’re not putting all those artificial things in your body.” (London, ABC1, Wave 1)

“You’re messing around with nature in a way. Which is a bad thing in the long term, because you don’t know what it’s going to do to your children, their children.” (London, C2DE, Wave 1)

Consumers’ preference for home-cooked food as opposed to processed foods went hand-in-hand with nostalgic beliefs about ‘simpler times’ and simpler food production processes. There was a perception that in previous generations, the food supply chain was less complex – with more local supply and purchasing.

MY CHOICES

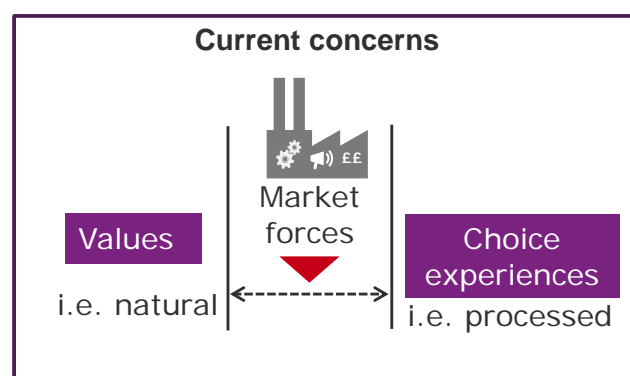


However, consumers believed that market forces (i.e. the way that food is produced, sold and marketed) had created an uncomfortable and widening gap between their values and the choices they made. Similar findings have emerged in previous Citizens’ Forums – When discussing food scares (Trace DNA¹), the use of novel technology²

(nanotechnology) or changes to oversight of the food industry (FHRS, Delivery of Official Controls), consumers consistently spoke about their concern at having lost touch with food production and where their food came from. They therefore felt increasingly at risk from deceptive or unsafe practices going unchecked within the food industry.

Although participants recognised that consumers ultimately had control over the foods they chose to buy, there were four driving factors which they felt, when taken in conjunction, presented real barriers to being able to make the kinds of choices they wanted to in relation to food purchasing and preparation.

- reliance on **convenience** due to limited free time for preparing food;
- **tightening budgets** which can limit overall choice;
- the **opacity and complexity** of food production processes and supply chains; and
- **marketing and price promotion** of convenience food.



¹ Acceptability of Trace DNA (2013) <http://multimedia.food.gov.uk/multimedia/pdfs/tracedna-viewsc.pdf>

² Nanotechnology and food (2011)

<http://multimedia.food.gov.uk/multimedia/pdfs/publication/fsacfnanotechnologyfood.pdf>

Consumers reported that modern lifestyles left little time for food shopping and preparation, and made it difficult to spend time preparing meals from scratch. Many expressed feelings that resulting habits of convenience were closing the door on traditional and 'good' food behaviours and pushing consumers to make food choices they were not always comfortable with.

At the same time, consumers perceived that cooking healthy, nourishing food was expensive – and expressed frustration and anxiety about the difficulties of food shopping on a budget. Many reported that they were still keenly feeling the impact of the recession, and reported difficulty feeding themselves and their families the way they would like.

“With a small family, I have to budget from week to week. And a lot of the time it is just hoping that you have enough from week to week to cope.” (Birmingham, C2DE, Wave 2)

Although pre-prepared and processed foods often seemed the more convenient or affordable option – one that consumers widely relied on – they also expressed discomfort with this choice. They did not understand current food production processes, which happened in a 'black box', and were deemed unnatural, mechanised and alien. They likewise expressed lack of trust in large retailers and manufacturers, who were assumed to be motivated solely by profit.

“I think we're getting tricked more often now. I think the bigger supermarkets are just consumed with making profit at any cost.” (London, ABC1, Wave 1)

“They [food producers/big supermarkets] are greedy and they get away with it. They're allowed to get away with it.” (Leeds, C2DE, Wave 1)

While participants accepted that consumer-demand (i.e., their purchasing choices) drove supply, they also believed 'big business' encouraged poor decision making via aggressive pricing and marketing. They perceived that large food retailers and manufacturers used packaging, special offers and advertising to promote unhealthy foods (see Section 3.5).

“Somehow they make you buy something you don't need as much of [...] mainly junk” (London, C2DE, Wave 1)

“We've talked about it in terms of packaging, the misleading labelling. Supermarkets do just seem to be able to control consumers to an alarming degree. ... It's getting more and more obvious how that is the case and more and more difficult to see what can be done about it.” (Newtownabbey, ABC1, Wave 2)

2.2 Needs and expectations for Government

Consumers fundamentally believed that the Government had a duty to help keep them safe,

and also to protect their interests around food more widely. They were eager for a visible Government presence in this space, and were not sure what was being done currently on their behalf.

“Big business is pressuring people like the food agency just like energy companies are pushing Ofcom, and I think our agencies aren’t strong enough, and don’t stand up to these people.” (Leeds, ABC1, Wave 1)

Keeping food safe

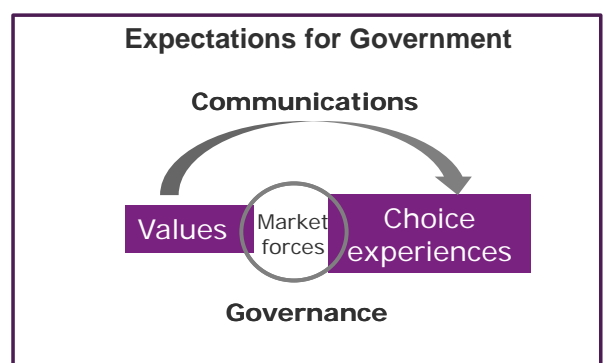
Consumers expected that food should be safe for themselves and their families, and expected Government to help ensure this. This included an expectation of protection from harm in the most extreme sense – e.g., in terms of keeping poisoning substances out of the supply chain. However, consumers also conceptualised safety in terms of long-term risk and *potential* harm – e.g., in terms of potential negative health impact of long-term ingestion of processed foods, additives, ‘unhealthy’ foods, etc. They expected Government to help protect consumers’ safety in both respects.

“I’m quite strict when it comes to preparing food, and I expect the hygiene of the food that I’ve bought to be up to standard as well, so it’s really key – because I don’t want the ones that I love to become sick.” (London, C2DE, Wave 2)

It was broadly assumed that ‘someone’ was *looking out for* consumers and ensuring that safety standards were maintained. However, when probed, consumers had little or no understanding of Government’s role in monitoring or enforcing food safety standards. They tended to be reassured to learn of the FSA’s current role in this space, although sometimes had higher expectations than what is done currently (or would be feasible).³

Enabling better consumer choice

Participants also expressed an underlying need to feel comfortable about the food choices that they make, and were keen for the Government to play some role in aligning consumer choices and value. And, as discussed above, they worried that changes to food supply and consumer habits were happening at the expense of consumer values and health.



Consumers wanted Government intervention to create a fair or real choice between perceived ‘good’ foods, which aligned with consumers’ expressed values, and ‘bad’ processed foods. They

³ For example, with regards to oversight of food outlets, consumers tended to expect more frequent inspections, higher fines and a greater number of business closures than is currently the case.

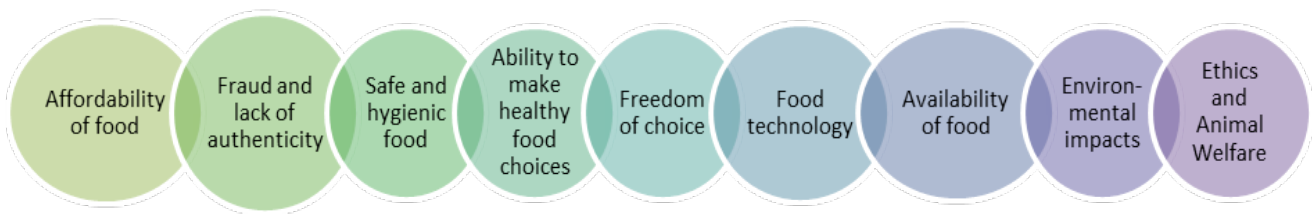
raised two types of intervention: **governance** of the industry to drive transparency and to minimise fraud and other 'deceptive' practices such as disguising high salt content (see Section 3.5); and **communications** to enable informed choice and counteract powerful marketing of 'bad' foods. Government communications around healthy food were considered particularly important given an experience of contradictory advice around healthy eating, and a sense that 'you don't know who to trust.'

"I think the brief for a government organisation has to be to give the information over to people so that they can make those choices. You can't make the supermarkets change because they're money driven." (Leeds, ABC1, Wave 2)

In the next chapter we outline consumer priorities in relation to food and provide further detail on consumer expectations for Government intervention to address these.

3. Priority areas of concern

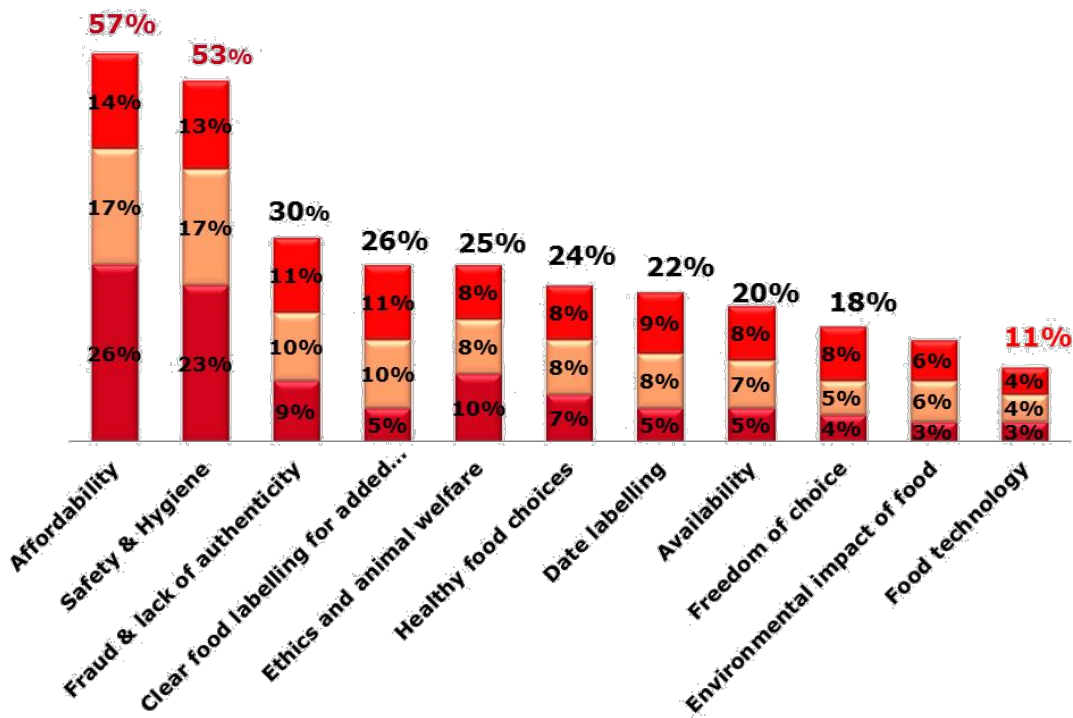
This section explores priority areas of concern for consumers in relation to food in more detail. We begin by summarising findings from the quantitative work carried out by Harris Interactive,⁴ which gauged consumer strength of interest and concern against the comprehensive list of issues which emerged from the literature review, these were:



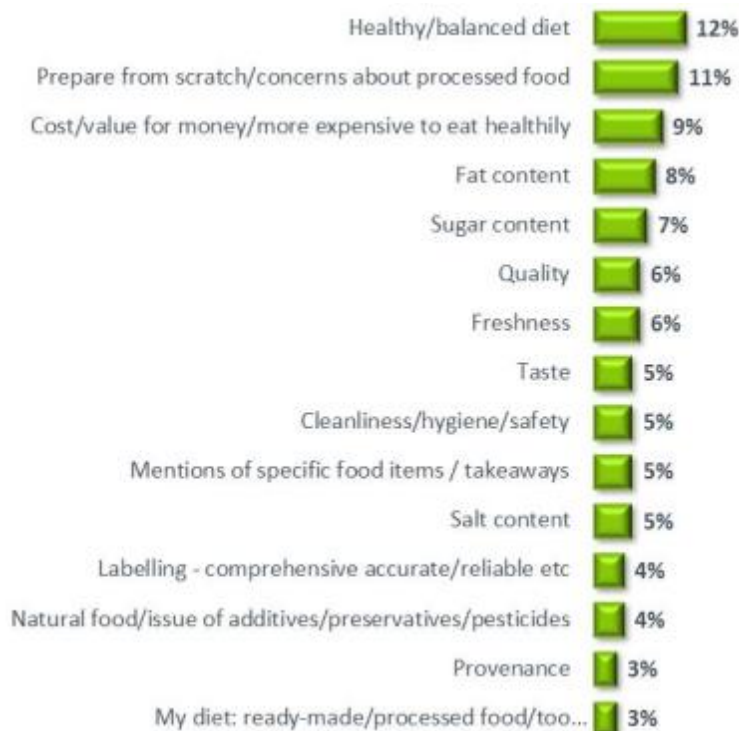
Drawing on insight from the citizens' forums, these issues were grouped to identify three priority areas of concern: affordability and healthy eating; food safety; and fraud. These are discussed in turn including how these issues impact people in their day to day lives and their expectations of what Government should do to address consumer concerns.

3.1 Survey findings

Prompted prioritisation exercises on the omnibus survey research revealed two clear stand-out issues in terms of consumer concerns: 1) affordability, and 2) safety and hygiene. Almost a third of the sample also indicated concerns around fraud and authenticity.



Open-response questions in which customers spontaneously identified their own priority issues around food (without prompting with the categories above) also reveal a high degree of interest in issues related to healthy eating and affordability of healthy food specifically.



3.2 Citizen Forum insight

The prioritisation of concerns that emerged from the survey was largely consistent with findings from prioritisation exercises carried out during the consumer groups, with affordability, safety and fraud emerging as priority issues.



The qualitative work then sought to understand what these issues meant in practice and determine the principles which underpinned consumer concerns and expectations.

This research showed that these issues meant different things to different people - and there was considerable overlap across them. For example, affordability often emerged as a barrier to making healthy eating choices; safety concerns overlapped with concerns about unhealthy eating, and about perceived fraud or 'deceitful' marketing practices.

In the sections below, we discuss each of these priority areas of concern in more depth, providing further insight into consumer concerns and what they expect Government to do to address these.

We then discuss consumers' secondary concerns around food – issues which they felt were important, but less influential overall on their day-to-day decision making and experiences. These included animal welfare, environmental impacts of food, availability of food and food technology (See Section 4).

3.3 Affordability and Healthy Eating

Healthy eating and affordability consistently emerged as key areas of concern for consumers. Participants recognised healthy eating was a 'hot topic' in that it was well publicised by Government, celebrities and the press. Many reported that they wanted to eat healthily but felt this was not a realistic, affordable choice. Participants said that certain 'healthy' foods – like fresh meat and fish, nuts and certain fruits and vegetables – were unaffordable for many people, particularly those living on tight budgets. The recession, the rising cost of living and growing use of food banks had reinforced their view that food costs are rising beyond many people's means. As a result, people felt they were priced out of making 'healthy' choices despite being worried about the potential health consequences of a poor diet.

"I would like to [eat healthier/more ethical food] if I could afford to. I feel quite stuck now, because I want to do things the right way but I can't. I can't afford to."
(Birmingham, C2DE, Wave 2)

"Nobody wants to eat junk, everybody wants to eat healthy foods. But it's just too expensive." (Aberystwyth, C2DE, Wave 2)

"It's difficult if you've got a crowd of kids, you work, you've got little money, you're trying to do all these things. [Supermarkets] should be transparent and honest but it won't make everybody go that way and buy the best because they can't afford to." (London, ABC1, Wave 1)

However, there were differing views about whether 'healthy foods' were in fact more expensive. Some participants argued that it was possible to make 'healthy' meals at low cost if you had cooking skills and were able to plan ahead. Participants identified a number of smart shopping and food preparation behaviours which enabled consumers to prepare healthy foods at low cost.

These included: cooking in bulk and freezing the excess, using leftovers to make lunch or dinner in the week, buying cheap cuts of meat and cooking these appropriately (i.e. in a stew), planning your meals based on which fresh produce was on offer. However, consumers recognised that these behaviours were more time consuming and required a good level of cooking skills and forward planning. Eating healthily was considerably more time consuming than buying processed foods and ready meals.

"When you look at what's good for you, how you should cook it, how you should not cook it ... it's a lot to take in, it's a lot of material to get right. ... And it [depends on] how much in your mind you want to hear what's being pushed out at you." (Birmingham, C2DE, Wave 1)

Participants also believed that many consumers lacked the necessary cooking skills to prepare food themselves from scratch. Therefore they would have to learn new culinary skills and change their routines in order to adopt a more healthy diet – and were eager for support in this. Likewise, many expressed frustration and overwhelm around the complexity and lack of consistency around healthy eating advice – for example, although eating too much fat and sugar was widely perceived as bad for you, consumers raised questions around what this meant in relation to 'good fats,' or fruit consumption. They also expressed cynicism around

healthy eating messages from industry and retailers – questioning whether low fat or low sugar products were actually healthy, because they often contained chemicals and additives.

“Then they’re saying to you in the next breath that too much carbohydrates are actually quite good for you: it’s not that less is not good, it’s better. So it’s a lot of mixed messages.” (Birmingham, C2DE, Wave 2)

“I worry more since I’ve had my kid. I’m more paranoid about ... even things like meat, hormones that have been injected... and what chemicals they’re putting in to food.” (Birmingham, ABC1, Wave 1)

What Consumers Want FSA/Government to do

Participants desired Government support to enable or persuade consumers to make healthier choices. To some extent, this was considered an easy sell as the public already had a good understanding of what they needed to do to eat healthily and people generally recognised the benefits of a healthier diet. However, it was considered important that there was a real or fair choice between healthy eating and processed foods – which meant making healthy meals appear comparable in terms of price and convenience and up-skilling consumers so they feel confident preparing meals from scratch.

There was strong support for the Government taking a lead on refreshing traditional skills in the kitchen around cooking, making meals stretch and household budgeting. This included reintroducing home economics at school – so that young people know how to cook and what is good for them – or community courses for adults wanting to change their food habits.

“My wife is an ex-home economics teacher, back when it was an intrinsic part of the curriculum. It’s a fundamental of life. They didn’t just teach them how to cook, they taught them how to do budgets and all sorts of things. How much has the country wasted because the youngest generations don’t know anything about it?” (Leeds, ABC1, Wave 2)

“Community courses can pick up those who’ve left school... cooking and healthy eating on a budget. We don’t think there’s enough education – people live a very takeaway kind of lifestyle, put a microwave meal in, ping, it’s done – and people need to be educated about how fast it is to make a meal from scratch for your family.” (London, ABC1, Wave 2)

Aside from persuading or enabling consumers to make the choices, consumers also believed that direct intervention was required to make healthy foods comparable in terms of price.

“[The government] should be making it more affordable, putting them on a level playing field. ... Why can't the government make junk food more expensive, and healthy food cheaper?”
 (Birmingham, C2DE, Wave 2)

There was strong support for the Government to influence pricing, although consumers questioned whether this would be possible. Many consumers advocated placing a tax on unhealthy foods, arguing that many consumers are motivated primarily by their budgets and therefore they would only change their behaviour where they found that they were no longer able to afford certain foods. However, there was also opposition to any measures which would increase the *overall* cost of food, given concerns that low income households were already struggling to meet rising food costs.

3.4 Safe and Hygienic Food

When consumers thought about ‘safety’ in relation to food they tended to talk in broad terms about the harm caused by food, both in the short and long term. They tended to be more concerned about ‘unknown’ health risks (e.g., potential long-term harm of poor diet or processed foods) than clearer risks such as food poisoning – although Consumer views are summarised below:

	Natural / short term	Unnatural / long term
In home	Consumers trusted their own practices but believed that other people may have dirty practices and need education. Trusted their experience and sensory cues (look smell) to judge safety	Concern that foods contain additives, hormones, pesticides and nobody knows the long term health problems – i.e. cancer and allergies
Out of home	Risk of food poisoning considered greater when eating out – as consumer have no control over hygiene practices, trusted experience, recommendation and visual cues to judge safety	Food production processes are so complex / alien consumers question whether it is even possible to test long term effects of processed foods/food production practices

Food hygiene risks

As we know from previous research consumers tended to see the risk from food poisoning as quite low. This was supported by research conducted by TNS BMRB on consumer attitudes to risk in relation to food safety⁵. This work comprised of both Citizens’ Forums research and a review of literature on attitudes to risk and found that consumers tended to underestimate

⁵ Balance of Risk and Responsibility (<http://www.food.gov.uk/science/research/ssres-0/foodsafetyss/balance-of-risks-and-responsibilities>)

risk from food borne disease or believed that risk was overstated – there was a strong counter-narrative that some exposure to germs was important to maintain a good immune system⁶. Consumers were also resistant to any information or evidence which challenged their deeply held beliefs and habitual behaviours about managing risk from food poisoning⁷. They tended to perceive the impact of food poisoning as relatively minor, to have low awareness of more serious potential consequences, and were confident in their own ability to control risk from food borne illness when cooking at home..

“Food hygiene isn’t such an obvious issue for me. I eat out less, and I don’t eat a lot of meat, I mean I eat a bit of chicken or fish. Things I buy are things I generally can, I feel, trust.” (Newtownabbey, ABC1, Wave 2)

Consumers tend to instead believe they are most likely to experience food poisoning from food cooked and consumed out-of-home, due to poor hygiene practices by the food business operator. When eating outside the home, consumers said they relied on experience, recommendations and sensory cues to judge safety. Despite perceiving eating out as being more risky than eating at home, consumers still believed that they were able to protect themselves by avoiding outlets they perceived to be riskier. There was a tendency to assume that outlets were safe if they had eaten many times before or the outlet had been recommended. Otherwise, consumers would look for visual cues which indicated that hygiene standards were good and maintained. These included whether the dining area and toilet looked clean, staff appearance and good practice e.g. washing hands, wearing gloves and hair net, clearing and wiping surfaces promptly.

“I think when you’re going out, you tend to be thinking more in terms of the hygiene quality of the place. I’m an absolute swine for going to look in the toilets in the restaurants. Because I’m a big believer that if you can’t keep the toilets clean, then I’m not going to eat in the place.” (Leeds, ABC1, Wave 1)

Whilst consumers were largely confident in their own ability to judge the safety of an outlet themselves, in some cases participants spontaneously raised the Food Hygiene Rating Scheme (FHRS) as a useful tool to inform decisions when eating out. As we have seen from previous FHRS research⁸, the key perceived benefits of the rating were that it was visual; easy to interpret and use; and that it was based on an inspection of the kitchens (an area which

⁶ Taché J., Carpentier B. “Hygiene in the home kitchen: Changes in behaviour and impact of key microbiological hazard control measures”, *Food Control* 35 (2014) 392-400

⁷ Maarten J. et al, “Food Safety in the Domestic Environment: The Effect of Consumer Risk Information on Human Disease Risks”, *Risk Analysis* 28 (2008), No. 1

⁸ FHRS reports 2012 and 2013

consumers often could not see for themselves). Therefore there was considerable support for FHRS as a mechanism for helping consumers distinguish between safe and risky outlets.

“We want to see a rating for every restaurant we eat at. I want a rating for cleanliness, for preparation of food. This needs to be listed and visible for everyone to see.” (London, ABC1, Wave 1)

Long-term health and wellbeing

The long term or unknown risk associated with increased consumption of processed foods was more salient and concerning for consumers than risk associated with poor food hygiene practices. When asked about food safety, consumers tended to focus on the possible long-term harm caused by the chemicals and additives used in processed foods and intensive farming (i.e. pesticides and growth hormones). Consumers believed that increased incidences of cancer and allergies were caused by the chemicals used in food production.

“I’m thinking about pesticides and stuff like that now. There are unexplained increases in cancer so you’re wondering is it to do with food chain, or what they’re spraying on crops and so on.” (Newtownabbey, C2DE, Wave 2)

Consumers’ concerns were compounded by the belief that it was not possible to test for the long term impacts of food production practices. Therefore, although they believed that novel technology was tested to ensure there was no immediate harm, they were not confident that there was any certainty around the long term health impacts. There was a perception that long term harm will only come to light when ‘it is already too late’, i.e. when the public have been consuming harmful produce for many years or decades and then the effects will be widespread.

“It’s too late for me now, I think I am probably already genetically modified. I’ve been eating processed food, things that have been coming from over abroad: it’s in my genes.” (Birmingham, C2DE, Wave 1)

What Consumers Want FSA/Government to Do

Consumers were strong advocates for robust inspection and testing to ensure that food is safe to eat. This went beyond checking that hygiene was properly maintained - ongoing testing of processed foods was also considered critical, to check for short and long term harm.

“What I would like to see is some sort of impingement on how we look at food and how we understand what is in food, and how we can be comfortable about... what affect that

food has on us, particularly in terms of the additives and preservatives that are put in food.” (Leeds, ABC1, Wave 2)

Consumers were also keen to see evidence of stringent enforcement penalties, such as fines, business closures and prison sentences, where food businesses were found to have knowingly placed the public at risk – for example, by repeatedly contravening food hygiene and safety rules or by knowingly using unsafe substances. This was both to act as a deterrent for food businesses and also to reassure the public that enforcement of food safety regulation was sufficiently robust. Evidence from previous forums has shown that consumers also expect that oversight of the food industry should go beyond ensuring that safety standards are maintained by encouraging or requiring the food industry to improve practices where possible.⁹

“There need to be company standards, and more of a risk for businesses: three strikes and you’re out; clearer grading for restaurants. Heavy fines and closures for businesses that are not up to standard. We feel like it’s very easy to pay your way out of trouble or let things slip through the net.” (London, Wave 2, ABC1)

Importantly, participants rarely had a good understanding of the current measures in place for ensuring food safety, in particular, how chemicals and additives were passed for human consumption. It may be therefore that the call for more robust testing and enforcement actually reflects a need for reassurances around the robustness of current practice.

“Ordinary people’s knowledge doesn’t allow them an insight to what’s really going on, so you really are depending on the government to do that for you - the people who do have the knowledge and are paid to do it. I think that ordinary people do have to place an enormous amount of trust in the government.” (Newtownabbey, ABC1, Wave 2)

Aside from direct interventions at an industry level, participants also suggested a range of interventions designed to highlight risk in relation to food. These included full roll out of mandatory FHRs display across all FBOs and use of labelling to flag the presence of ‘harmful’ chemicals. This second point reflects a perception that unnatural foods present a safety risk (in terms of long term harm) and therefore consumers should be prompted to consider this when choosing these items – in the same way that traffic light labelling flags high sugar, salt and fat content. As a secondary benefit, there was a perception that these interventions would drive standards among manufacturers and food businesses.

Finally, consumers argued that the FSA should continue to educate the public about safe food handling practices. As discussed above, there was a perception that people were losing cooking

⁹ Acceptability of Trace DNA (2013) <http://multimedia.food.gov.uk/multimedia/pdfs/tracedna-viewsc.pdf>; Earned Recognition (2011) <http://multimedia.food.gov.uk/multimedia/pdfs/earnedrecog.pdf>; Mandatory Display of FHRs 2012 <http://multimedia.food.gov.uk/multimedia/pdfs/earnedrecog.pdf>

skills which may put some people at risk of unhygienic or dangerous food handling practises. Therefore they felt the FSA has a responsibility to communicate with and educate the public to ensure everybody knows how to handle food safely. These attitudes echoed previous research on *Campylobacter* where consumers said they wanted practical advice on how to manage food risk, but were unwilling to pay more to reduce risk where they were able to control this themselves through better food handling..¹⁰

“Education in many, many aspects of food is the key to having a healthy population in the future: people who rely less on the health service because they’ve eaten more wisely.” (Leeds, C2DE, Wave 2)

3.5 Fraud and Authenticity

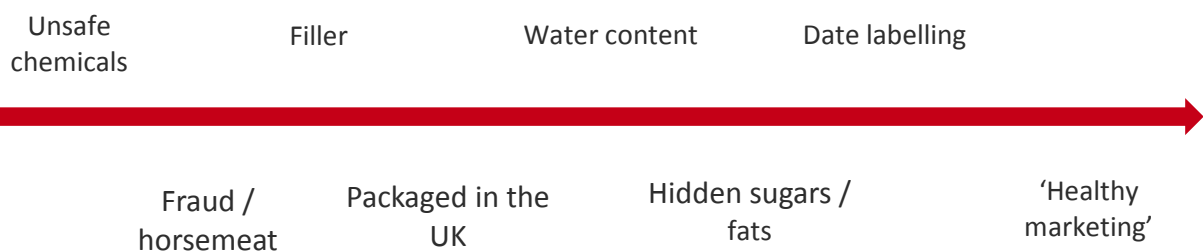
Whilst consumer interest in fraud and authenticity was triggered by media coverage of the horsemeat scandal, discussion of this issue was not isolated to illegal practices. Consumers expressed wider concerns about deceptive practices used to increase profit. Whilst not illegal, consumers believed that more should be done to reign in deceptive practices to increase consumer confidence that the food they buy *‘is what it says on the tin’*.

High profile press coverage of illegal practices, like the horsemeat scandal, highlighted the uncomfortable truth to consumers that they have very little knowledge of the journey their food has taken prior to consumption. Food production seemingly happens in a ‘black box’ and this raised anxiety given that consumers must rely on the food industry and government to ensure that their food is handled appropriately and they are getting what they paid for. As we found in the trace DNA work, which was conducted in the immediate aftermath of the horsemeat scandal, these types of event highlighted to consumers that oversight of industry was not sufficiently robust to prevent ongoing endemic fraud..¹¹

These kinds of scandals also confirm people’s worst fears about the food industry - that manufacturers and retailers are actively deceiving the public to increase profits. They reported feeling ‘hoodwinked’ by – concerned about overt fraud but also frustrated about legal but deceptive practices, such as using filler to bulk up products or using unknown terms and jargon to hide the presence of unnatural or unhealthy ingredients. The full range of deceptive practices discussed included:

¹⁰ *Campylobacter* (2010) <http://multimedia.food.gov.uk/multimedia/pdfs/citforumcampy.pdf> ; *E.coli*

¹¹ Acceptability of Trace DNA (2013) <http://multimedia.food.gov.uk/multimedia/pdfs/tracedna-viewsc.pdf>



Filler / water content – consumers were acutely aware of practices to increase weight and bulk using cheaper produce. As a result, product descriptions were often considered deceptive when compared to the ingredients— e.g. sausages which contain less pork than expected, or chicken pie which contain other cheaper meats.

‘Packaged’ in the UK – Participants believed that manufacturers were profiting from consumers preference for British produce by using the British flag on packaging (or in some way indicating the product is British) when in fact the product was processed or packaged in the UK and much of the content was imported.

Date labelling – There was mixed views and understanding of sell by date labelling and use by date labelling; some respondents did not understand the difference, others said they paid attention to the use by date by not the sell by date, and others still said that they ignored both. However, date labelling was raised spontaneously as a concern, because consumers believed that retailers used date labelling to trick consumers into throwing away food and buying more.

Hidden sugars/fats and healthy marketing – Food packaging was considered highly opaque and deceptive. Consumers believed that manufacturers used scientific terms and jargon to disguise unhealthy ingredients for example using terms like fructose and sucrose for sugars. Additives and chemicals were written in small print on the back of packaging, the assumption being that this was to discourage consumers from scrutinising these too closely. Finally, processed foods often used natural imagery or pictures which made food appear home cooked in order to defer attention from ingredients which consumers would consider unnatural.

As a result of feeling ‘hoodwinked,’ consumers said they had lost confidence in the food they buy and eat. They often didn’t feel confident in their ability to understand exactly what a food contains, and were not sure that the regulatory system is protecting them to the extent it should.

What Consumers Want FSA/Government to do

Consumers said they wanted the Government to ensure greater transparency through the use of consistent rules around labelling and marketing, and to ensure that any businesses that don't follow these rules are penalised. It was suggested that an 'independent agency' should develop rules around how food is labelled and also marketed – as with traffic light labelling.

"How do you know when you look at a package, who has put what down? Is it the company, who's arbitrarily put down this information themselves? Or has it been overseen by an agency which you trust? Make it simpler – have one particular way of doing things which is structured and which is uniform." (Leeds, ABC1, Wave 2)

They also said that rules around food labelling / packaging would help increase transparency. Manufacturers should be made to use familiar terminology and provide clear indicators so consumers are made aware of high levels of potentially 'harmful' chemicals or ingredients – e.g., via easy identification of any additives, sugars, 'chemicals', etc. Consumers believed they would be more able to use information that was presented in a consistent way. Some also raised that the Government should prevent manufacturers from using 'natural' imagery to sell processed foods.

"We want more information on the origin, more monitoring. Because there are so many companies out there nowadays, so many producers – it just comes into the supermarkets left, right and centre. And if there was just a little more legislation, or the government was just able to control it a little more and say 'it's not going into a supermarket unless it says ... you're buying this salmon from the west side of Scotland' or things like that." (Leeds, ABC1, Wave 2)

"The objective is for everyone to have clarity about what's actually in food. So if there's horse in it, we'll say that there's horse in it. If there's sucrose in it, it will be called sugar; if there's fructose in it, it will be called sugar. That's the key thing and that would just be legislation: this is the law, this is what you call stuff. ... How many people here believe genuinely that what they're eating is what it says on the label? We don't understand it." (Birmingham, ABC1, Wave 2)

Consumers said there should be heavy fines or prison sentences for manufacturers and retailers who use fraudulent or deceptive practices to mislead consumers about what they are buying. There was a perception that not enough was being done currently.

"You need to hit them with a lying tax, an honesty tax. Make sure they're not allowed to sell their products for six months." (Leeds, C2DE, Wave 2)

"We need really harsh fines for repeat offenders. Businesses pay their fines but then they just carry on again." (Aberystwyth, C2DE, Wave 2)

4. Secondary Areas of Concern

This section explores secondary areas of concern for consumers – issues which did not seem to have the same level of day-to-day importance to consumers, but which they still considered important. These included environmental impacts of food, animal welfare, food technology and availability of food.

4.1 Environmental impact

Environmental impact was not a top of mind concern for consumers. However, when it arose during discussion or through prompting by the moderator, consumers were uncomfortable about the potential for environmental damage caused by modern food production and consumption. Consumers raised a broad variety of environmental issues including: deforestation (slash and burn) for farming, waste and environmental damage caused by food packaging, food miles, and the use of chemicals like pesticides during food production. However, even when consumers were conscious of these issues, most acknowledged that their own habits and the way food was marketed made it easy for consumers to make choices that were damaging to the environment without necessarily being aware of this. Food waste was considered a key behaviour to be addressed, participants believed that through BOGOF deals and misleading date labelling the food industry promoted waste to increase their profits – this was considered a key area where consumers could be made more aware of the negative impact of their behaviour and take more responsibility for their choices.

“We waste so much, it’s not really acceptable, we need to take responsibility” (London, C2DE, Wave 1)

“Who sets the sell by dates? It’s in the industry’s interest to set them short so we throw away and buy new.” (Leeds, ABC1, Wave 1)

What Consumers Want FSA/Government to do:

Primarily, consumers were keen for the FSA (or the government more generally) to take a regulatory role and help enforce controls on the food industry to ensure that responsible practice was adopted. Some suggested legislating against wasteful packaging and harmful chemicals, or against the excessive importation of food from abroad. Some suggested a potential tax on the miles food travels to reach supermarket shelves. Others felt that subsidies

for farming in the UK could be used to encourage domestic food production and said that they would seek to buy locally sourced food where this was available.

"If there was a supermarket which said that all our meat and all our vegetables came from the local areas of Yorkshire, minimum transportation, I would buy from there' (Leeds, ABC1, Wave 2)

Consumers also felt that the government could engage in communications activities to influence and inform consumer behaviour. Consumers approved of the idea of labelling that could encourage engaged and informed choices regarding the miles travelled by a product, or the chemicals involved in its production. Consumers also wanted communications campaigns from the government that could broadcast messages about 'eating British food' or minimising environmental impacts.

4.2 Animal welfare

As with the environmental impacts of food production, consumers felt uncomfortable about the potential results of their choices in terms of poor animal welfare – but felt that there were few viable ways for themselves as consumers to affect the practice of food producers other than by paying a premium. Some respondents stated that they were unable to purchase free range produce, and other more 'ethical' food choices, due to the pricing – and for some consumers, their sense of disengagement and distance from the food production process meant that it was easier not to become overly concerned about these issues.

"You just have to stop thinking about chickens packed in don't you. It's a boiled egg at the end of the day. It's an egg. It might sound callous but that's what they were bred for." (Birmingham, C2DE, Wave 1)

In the first wave, animal welfare was a low priority in comparison to other issues, largely because consumers said they had to prioritise eating safe and healthy foods within their budget. However, in some instances there was a shift in attitudes in wave 2 where consumers' own research led them to make a link between animal welfare standards and the health of animals, with concern that disease from animals could make its way up the food chain to consumers. Concern around animal welfare was also (as with concerns around environmental impacts) linked with broader preferences for buying British produce, as welfare standards were perceived to be higher in the UK than abroad.

What Consumers want FSA/Government to do:

The scope for Government intervention was considered limited as participants said it was essential that consumers could choose whether to spend more money on ethically produced foods based on affordability and their own ethical standpoint. Therefore blanket changes to improve animal welfare standards would not be appropriate where this increased food prices. However, consumers believed the Government had a responsibility to ensure that the food industry maintained minimum animal welfare standards, the treatment of animals had no adverse impact on the quality and safety of the food produced and that there was transparency around welfare standards and how animals were reared, particularly where this attracted a price premium.

Among those consumers who were concerned about animal welfare, there was a general sense that this issue was more in the hands of food producers than it was something that the Government could affect. Their primary concern was that government should implement regulations to ensure ethical standards of food production; but for many there was an expectation that this kind of activity was already taking place, and that ultimately government's ability to control 'unethical' but legal practices (such as battery farming of chickens) was limited.

Beyond this, some felt that there might be room for government communications informing the public about unethical practice, or further promotion of food that was free range. However, this was again felt to be an area in which alternative considerations (such as price and availability) would ultimately drive consumer choices.

4.3 Food technology

When approaching the issue of potential changes in food technology, most consumers admitted that they were speaking from a position of ignorance. The main issues that were discussed included genetic modification and the use of new chemical additives and preservatives. A few consumers discussed further issues such as the use of nanotechnology in food production.

Opinion on these topics was split. Some consumers reacted fearfully to any suggestion that 'technology' might be used to move food away from its natural state, whether this be through the use of nanotech or via genetic modification – this reflected fear both about immediate impacts on food and the ecosystem, but also fear about potential long term impacts of additives and genetically modified food on the health of those who consumed it. However, there were other consumers who reacted more neutrally to potential future developments in food technology, assuming that scientists and the government would not allow anything unsafe

to enter the food chain. A few even saw these developments as potentially positive, helping to increase levels of food production.

"As long as it's safe to eat, I don't see why we can't take pigs from 20lb and make that pig 500lb. That's great because you're going to feed a lot more people." (Birmingham, C2DE, Wave 1)

What consumer want FSA/Government to do:

As with ethical food and animal welfare, consumers largely expected that the government would have a role to play in enforcing safety standards, and ensuring that harmful food was not consumed by the public. In the case of new technologies such as GM food and nanotechnology, many respondents were keen that the government ensure that sufficient scientific testing was done prior to any commercial use of these technologies.

Some respondents expressed a desire for greater information about these technologies, and felt that the government might have a role to play in providing reliable information about the impact of technologies on food and consumers' health.

4.4 Availability of food

Food security was also not a top of mind concern for participants. When prompted by the moderator to discuss the availability of food, consumers tended to raise the negative consequences of having too much choice and the quantity of food available. There was a perception that excessive choice in supermarkets was encouraging irresponsible food choices and wasteful practices. This in turn was creating an environment where consumers expected to be able to source any foods they wanted at any time of year.

Food security in the future was not perceived to be a pressing risk in the UK - rather this was considered to be a greater threat in developing countries or countries more susceptible to extreme weather events. However there was some anxiety about the long term impact that modern food production would have in the future if intensive food production damaged farming land reducing our capacity to produce food crops in the UK. Similarly consumers were concerned that the UK farming industry was at risk from lower cost imported food, forcing UK farmers to reduce their prices. Consequently, there was some support for Government intervention to ensure that the UK maintains capacity to produce a sufficient amount of food should imported food sources become less reliable in the future.

What Consumers Want FSA/Government to do:

Whilst consumers strongly believed that the Government had an obligation to ensure that there would continue to be enough food to sustain the country, they recognised that this was extremely difficult to predict or control. Promoting sustainable practices was considered key, this included changing the food choices consumers made, supporting the UK farming industry and changing food manufacturing and retail practices to promote, rather than undermine, sustainability – all of which would require radical Government intervention to revolutionise food production and choices. Consumers questioned whether such change would be viable, not least because consumers themselves may be reluctant to give up the convenience and level of choice they currently enjoy.

Consumers believed that food technologies may present a solution for example using genetic modification to produce better yields or more hardy crops. Therefore consumers argued that Government had a responsibility to fund or promote research into the viability and safety of food technology to ensure food security and to engage with the public to allay concerns.

4.5 Views about the future of food production

Ultimately, consumers felt it was important that food was produced in a way that was ethical and sustainable – and each of these secondary concern areas tended to have individual issue ‘champions’ that felt strongly about them. However, for most participants these issues felt further away from their day-to-day considerations and practices around food, and less pressing than the primary issues as discussed in Section 3. Furthermore, participants argued that ‘ethical’ choices such as buying organic, free range, fair trade or only local produce (e.g. from farmers markets) attracted a premium both in terms of price and convenience. Making ethical choices as a consumer was considered a luxury – consumers said they cared about these issues, but could not afford to make choices to reflect these attitudes.

“In our little bubble when we’re doing our weekly shopping we’re not thinking are people in so-and-so getting enough food, we choose to ignore that. Packaging, the look of food – that comes immediately to face, so that’s your main priority.” (London, Wave 1, C2DE)

However, as research progressed, many consumers became increasingly concerned about these secondary issues – considering that these issues would have significant impact on their choice and decision making *in the future*. Consumers were concerned that food production was becoming increasingly industrialised and that, without intervention, the market forces they currently saw as driving poor food choices would ultimately damage the food chain and make ‘good choices’ even more difficult. They believed that large retailers were adopting unethical practices that were changing the food chain in the long term – both by driving intensive

farming practices in order to meet low prices and becoming increasingly reliant on imported foods to meet demand all year round.

In particular, participants expressed concern about the impact of supermarket pricing on British farmers. There was a perception that food manufacturers and retailers were putting too much pressure on farmers to meet low prices and consumers feared that small local producers would be unable to compete against international suppliers and large producers using intensive farming practices. If these practices were to continue, consumers believed that the environmental damage and changes to the food supply chain would become irreversible – reducing consumer choice for local or ethical produce.

“Supermarkets are putting more and more pressure on the farmers to make the food cheaper just isn’t right [...]it’s not a level playing field which means the EU countries can produce pork cheaper and supermarkets can sell it at a lower cost thus driving out the UK pig framers so we do have a choice in buying British and buying meat from farms with good levels of welfare but we don’t have a choice if the Supermarkets don’t stock it.” (Wales, Wave 2, ABC1)

This concern typically went hand in hand with recognition that consumer behaviour often contributed to perceived unsustainable practices. For example, they noted that by demanding food out of season, imported foods and buying multipacks of perishable foods which then go to waste, consumers were creating demand for excessive choice at low prices. There was a strong view across all groups that increasing consumption of locally produced foods was a key mechanism for returning to a ‘simpler’ system of food supply and production, which better aligned to consumer values. However, as elsewhere, they felt the British public needed support to change their practice.

What Consumers want FSA/Government to do:

Participants expressed a desire for a number of interventions to prompt consumers to reflect on the wider impacts of choices they made. This included communications or education campaigns which encouraged the public to source more local produce and food miles labelling to flag at point of purchase the environmental impact of purchasing imported or out of season foods.

They also desired more direct intervention – believing that behaviour change would be difficult without shifting the current choice architecture. Participants discussed subsidising farmers to make local foods more affordable and banning buy one get one free deals on perishable foods. Importantly there were also strong views against banning buy one get one free deals as these did make ‘healthy’ choices such as fresh fruit and vegetables more affordable and an attractive option for large households. However, it was considered important that more was done, again

through labelling or education, to make consumers think about their choices when in the shop and plan how they will use all the produce to avoid waste.

Finally, there was also strong support for tighter control of the food industry, including: oversight of the food supply chain to support British farmers; implementation of basic standards for animal welfare and sustainability; and Government intervention to drive more responsible and environmentally sound practices by UK suppliers.

5. Conclusions

Overall, there was a clear **lack of trust in the food industry**; consumers felt they were being hoodwinked and could not trust food packaging and labelling to accurately explain what was in the food they ate. At the most extreme end, consumers were concerned that food retailers and manufacturers were using deceptive packaging and labelling to sell foods they knew to be harmful in order to make a profit. Consumers expected that someone (FSA or the Government) would champion their interests.

Consumers had **limited awareness of the Government /FSA's role around food** and as a result they either believed that nothing was being done, reinforcing the view that consumers were at the mercy of large corporations, or their expectations exceeded current practice. They were eager for a more visible 'voice' and presence.

There was **strong support for heavy fines and prison sentences** for illegal, fraudulent or unsafe practices on behalf of retailers and businesses involved in the food production or supply chain. Issues like the horsemeat scandal had significantly undermined trust, both in the industry to protect consumers and in the regulatory framework to prevent unlawful practice. Consequently, tough measures were sought both to act as a deterrent to food industry and to reassure consumers that regulation of food is sufficiently robust.

Beyond clamping down on fraudulent practices, consumers were also strong advocates for interventions to **rein in deceptive marketing and packaging of 'bad' food** designed to encourage consumers to buy more processed foods.

Many of the **communications interventions suggested were intended to interrupt habitual choices behaviour** and make people think about what they are buying. This indicates that consumers recognise at some level that food choices are often automatic with little thought. There was also strong support for point-of-choice interventions, like traffic light labelling, that flag good or bad choices (e.g. food miles, FHRS and traffic light labelling for 'unnatural' foods).

Consumers readily welcomed **a combination of interventions in order to both encourage better consumer choices and rein in the food industry**. There was strong support for government intervention, indicative of a strongly held belief that food supply had already

moved too far from the ideal. Participants identified a range of necessary interventions including:

- Reassurance messages – here's what we are already doing to protect you
- Education – here's how you can make safe, affordable and healthy choices
- Advice- providing a trusted voice on what is 'good' or 'bad' to counter inconsistencies and media hype
- Direct intervention and regulation – to control what food is made available and how this is presented to promote positive choice e.g. via labelling, pricing, restrictions on marketing/packaging and monitoring of retailer practices.

In addition, consumers spoke more broadly about the Governments responsibility to **safeguard the future of food**, meaning that the food chain does not become so complex that consumers can no longer access 'simple' foods that align with their values without a large price premium.

Appendix 1 – Sampling and recruitment

Ten re-convened workshops were held in London, Birmingham, Leeds, Aberystwyth and Newtown Abbey over two waves. Each workshop comprised a group of approximately 10 participants, and discussions in each wave lasted 90 minutes. Locations were selected to include a geographical spread across England, Northern Ireland and Wales. The sample profile of each group sought to reflect the local population in each location, including a spread of gender, age, and ethnicity (see breakdown below).

The recruitment was managed by TNS BMRB's in-house qualitative field team. Field managers were fully briefed on the project and provided with detailed recruitment instructions and a screening questionnaire in order for the recruiter to assess participants' eligibility to take part in the research. All recruiters are members of IOCS (Interviewers Quality Control Scheme), adhere to MRS guidelines at all times, and have signed data security agreements in line with ISO27001 the data accreditation held by TNS BMRB.

Participants were identified using 'free-find' techniques, where contacts are identified using 'on the street' recruitment. Following recruitment, all sample details were verified by our internal team.

All discussions were moderated by independent facilitators, and representatives from the FSA were on hand to answer questions and help clarify any areas of uncertainty. Stimulus materials and exercises were used to encourage discussion and provoke debate. The findings were subject to full analysis, which forms the basis for this report.

Within each location, we recruited homogenous groups in terms of socio-economic group and ensured a spread across age, ethnicity and gender to reflect the local population. The table below indicates the breakdown of participants recruited to participate in this research.

Gp	Area (total)	Gender	Age	Rural/Urban	SEG	Ethnicity
1	London: 10	Male: 5 Female: 5	18-24: 0 25-54: 9 55+: 1	All Urban	ABC1: 10	White: 8 Non-white: 2
2	London: 10	Male: 5 Female: 5	18-24: 0 25-54: 8 55+: 2	All Urban	C2DE: 9	White: 7 Non-white: 3
3	Birmingham: 10	Male: 5 Female: 5	18-24: 0 25-54: 9 55+: 1	Urban - 7 Rural - 3	ABC1: 10	White: 9 Non-white: 1
4	Birmingham: 10	Male: 5 Female: 5	18-24: 2 25-54: 6 55+: 2	Urban - 8 Rural - 2	C2DE: 10	White: 6 Non-white: 4
5	Leeds: 10	Male: 5 Female: 5	18-24: 1 25-54: 5 55+: 4	Urban - 6 Rural - 4	ABC1: 10	White: 10
6	Leeds: 10	Male: 5 Female: 5	18-24: 1 25-54: 5 55+: 4	Urban 6 Rural - 4	C2DE: 10	White: 8 Non-white: 2
7	Aberystwyth: 10	Male: 4 Female: 6	18-24: 3 25-54: 4 55+: 3	Urban - 3 Rural - 7	ABC1: 10	White: 10
8	Aberystwyth: 10	Male: 6 Female: 4	18-24: 2 25-54: 4 55+: 4	Urban - 6 Rural - 4	C2DE: 10	White: 10
9	Newtown Abbey: 10	Male: 5 Female: 5	18-24: 0 25-54: 8 55+: 2	Urban - 4 Rural - 6	ABC1: 9	White: 10
10	Newtown Abbey: 10	Male: 5 Female: 5	18-24: 0 25-54: 9 55+: 1	Urban - 5 Rural - 5	C2DE: 10	White: 10

Appendix 2 – Homework exercises


Between the first and second wave, participants were asked to collect information about issues which they were interested in. Participants produced a range of materials, examples of which are contained here.

What is healthy eating?


- A balanced diet which includes, protein, unsaturated fats, fibre, carbohydrates vitamins and minerals. Foods to avoid are those high in sugar, salt and fat.

Advice About Healthy Eating Habits


- Eat a variety of healthy eating
- Large plate of starchy grains, fruits and vegetables
- Eat moderate portions
- Maintain a healthy weight
- Reduce, don't eliminate certain foods
- Balance your food choices over time
- Make changes gradually




I try to avoid processed food as it contains too much fat salt and sugar.



I do still enjoy a glass of wine



I've reduced the amount of green leafy vegetables as they interfere with the warfarin and I've cut back on the amount of cheese I eat as it affects my cholesterol. I feel that some of the changes are difficult as I really enjoy these foods, but my health is more important.





My son is slight and very active yet according to his BMI he is overweight. School sent a letter advising 'healthy eating' and exercise. WHAT A WASTE OF MONEY - why didn't they (the government) invest in providing price reductions for healthy food?



5 A DAY
We are now being told to cut down on fruit and fruit juices. My Children love apple juice and apples. Guidelines are ever more unclear

JUICE DIET; I love to squeeze fresh juice - not only do I like the taste but you feel like you are 'drinking yourself healthy'!



change
4 life
Eat well Move more Live longer

My kids eat butter, carbs, sugar - hopefully not to excess



I remember seeing these adverts all the time but not so much now.



Every new piece of advice seems to contradict the old. Apparently a diet high in carb (especially processed ones) and sugar is the cause of most diseases (degenerative ones) - HELP! What to do?!

It is expensive to do and is therefore extra satisfying if you manage to pick up reduced fruit and veg.

Apparently there is no proof that a low fat diet has any positive effects on health?

I have no qualms about buying reduced food as long as there are no signs of mould.



HEADLINE:
"Pizza Hut's 2,880 calorie monster"
REALLY? Could this be true?
We like Pizza Express. I always have superfood salad (love it) but everyone else has 'carb-tastic' without fail.

FOOD LABELING.

Labelling comes in numerous sizes and shapes.
From Cereal Boxes to Chewing Gum packets.
From Cylindrical Cans to Plastic Bottles.
It bears a variety of messages.
It is designed to attract the consumer.

MUST BY LAW/EE.

Clear and easy to read
Permanent
Easy to understand
Easily visible
Not be misleading

For food sold pre-packed labelling must display :-

The name of the food
A 'best before' or 'use by' date (or where to find it)
Quantity
Any necessary warnings e.g. with sweetener

Labelling must also display :-

A list of ingredients (if there are more than 2)
The name and address of the manufacturer, packer or seller
The lot number (or use-by date)
Any special storage conditions
Instructions for use or cooking, if necessary

Other types of labelling:-

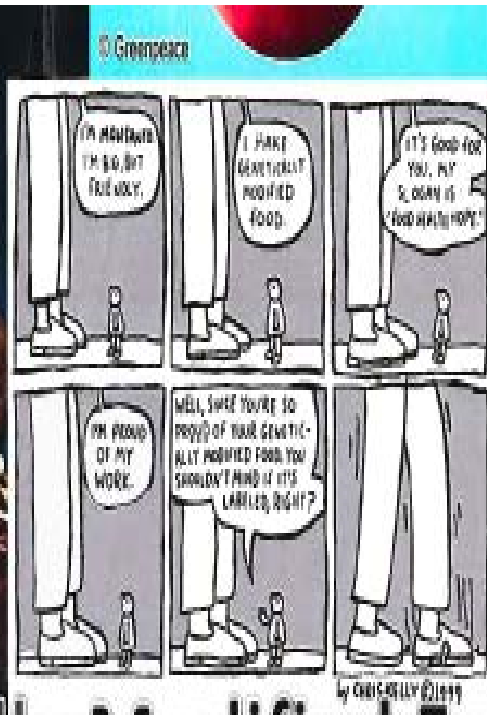
Nutrition labelling
Health claims labelling
Medical claims labelling
Produce labelling

However beware of misleading labelling

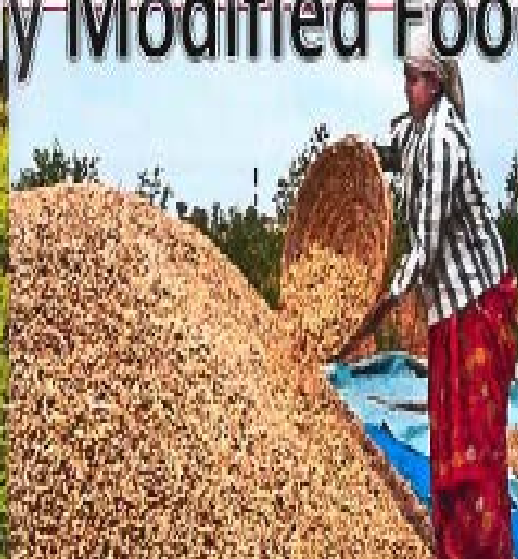
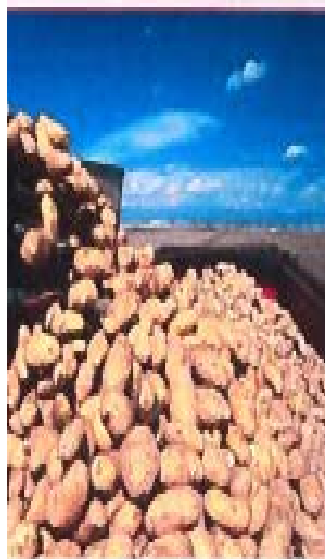
Checks on hundreds of food samples, which were taken in West Yorkshire recently, revealed that more than a third were not what they claimed to be, or were mislabelled in some way.

<p>I only read the instructions for use or cooking</p> <p>I consider likely allergy information important.</p> <p>Consider most labels too cluttered or printed too small</p> <p>Details should aid ethical choice</p> <p>Should be more clarity as to nutritional contents</p> <p>Nutritional content should be shown in one standard form</p>





Genetically Modified Foods



Food Fraud and lack of Authenticity



TRUE OR FALSE?

Food businesses have to be inspected before they sell to the public

FALSE

Although 99% of you think they should be, Food businesses should register with their local authority 28 days before they begin trading so their risk can be assessed. But many local authorities are struggling to visit at all, let alone ahead of opening. In March 2013, 33.6% of food businesses in Wycombe hadn't been risk assessed.



Local authorities are legally required to take samples for microbiological contamination

FALSE

The FSA expects them to, especially as they receive funding to do this. Yet several took no samples in 2012/13 (see right). In the UK around a million people suffer a food-borne illness each year - of these around 20,000 require hospital treatment and 500 die. Food-borne illnesses cost the UK economy around £1.5 billion every year.



Horsemeat in our food was a health risk

FALSE

The health risk was not with the horsemeat itself but more with a pinkiller called botul that is used on horses. This can be harmful to humans. In this instance, none was found at unsafe levels so the problem was the food fraud - substitution of an expensive ingredient (beef) with a cheaper one (horses). But food fraud can carry high risks, for example, adulterated alcohol containing harmful methanol can have serious health effects, including blindness.



Most people have doubts about the safety and the contents of our food since last year's horsemeat scandal. We are no longer confident that the food we buy is stated on the ingredients. Some unscrupulous companies are cutting corners by replacing expensive ingredients with cheaper ones. Trading Standards and environmental health depts need to do more testing on our food. We as a family make sure we buy locally produced food.