

FSA – Strategy Omnibus Survey

Research Findings

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Background & Objectives

- Work is underway to develop the FSA Strategy 2015 – 2020.
- The FSA seeks to better understand the public perspective to inform the development of the strategy and to structure planned Citizens Forums.
- A key component of this first stage of research was to understand what is most important to the public in terms of the food they eat.
- Further to this, the research seeks to understand what the public believes the government should prioritise with regards to food issues. This should then help inform the FSA future strategy.
- To achieve these objectives, an Omnibus survey was conducted to canvass the opinions of a representative sample of UK citizens
 - The findings from this Omnibus survey are detailed in this presentation.

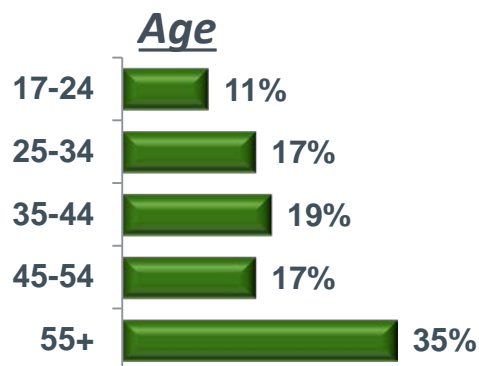
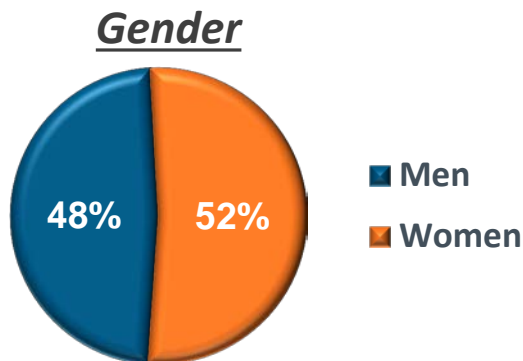
Approach & Panel

- We conducted an online omnibus survey with 2,060 adults aged 16+ across England, Scotland, Wales and Northern Ireland between 14th and 20th January 2014.
- The survey took place using the Harris Interactive online panel, the Harris Poll.
- The Harris Poll Global Omnibus consists of members of the general public who have opted in and voluntarily agreed to participate in online research studies. Through careful recruitment and management, we are able to rapidly survey large numbers of the general population and accurately represent the views of the nation.
- We have over 100,000 active panellists in the UK and our panel is used solely for market and opinion research. Members are contacted at random and invited to take part in a survey.



Omnibus Audience – a representative sample

- The results of the study were weighted to best reflect the size and shape of the population of the UK
- This means that the results in this report reflect an audience that is as true as possible of the population with the same age, gender and regional profile. The audience profile is detailed below.
- Of course not everyone in GB has internet access, but online panel research results are considered to be extremely accurate. In fact, according to the British Polling Council, Harris Interactive was the most accurate *online* polling company during the last UK elections in 2010:
<http://www.britishpollingcouncil.org/press100508.html>





Summary of Key Learnings

Summary – key learnings

- It is clear that the public is more concerned about having a healthy diet (12%) and processed food/preparing meals from scratch (11%) than any other single issue
 - The cost of healthy eating also ranks highly as an issue (9%)
- When asked to choose which food-related topics were important to them, worries about **food safety & hygiene** (85%) and **affordability** (84%) were the most common
 - When asked to rank the topics on importance, these two topics were ranked as most important
- However, relatively less interest was shown for the **environmental impact of food** (66%) and **food technology** (63%) in comparison to the other topics
- **Over a third** (38%) **worry** about the safety of the food they eat
- **Food fraud & lack of authenticity** (61%), **food technology** (55%) and **food safety & hygiene** (53%) are considered to be the top 3 issues falling within the responsibility of the Government
 - The public wish to see the Government **prioritise these three topics** the most
 - Although the public deem **freedom of choice** important, they do not believe it is the responsibility of the Government
- When asked what issues respondents would like to see the Government take greater responsibility for in the next 5-10 years, 64% gave no answer.
 - **Food safety, cost** and **promotion of British food** top the list but each has just 5% of mentions
- 93% are familiar with the FSA, with 37% 'familiar to some extent', and 58% saying they know just the name. 6% have never heard of the FSA.



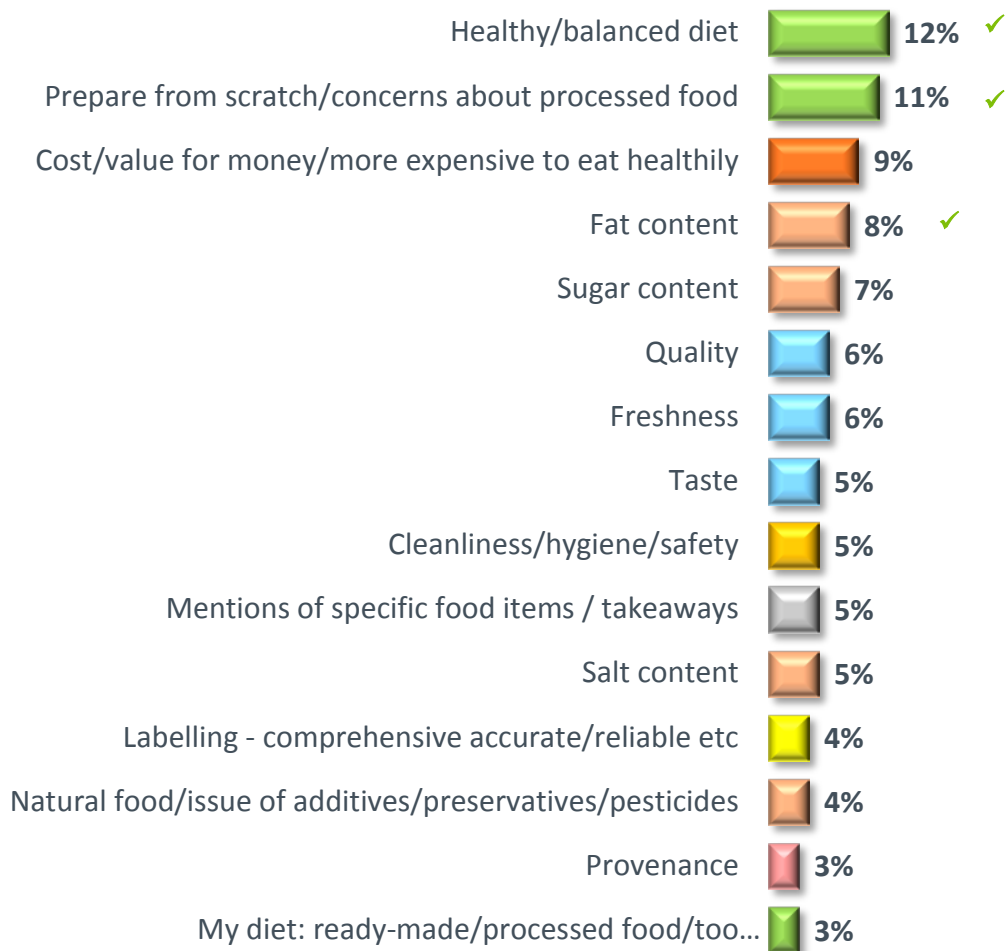
Section 1

What is top of mind when it comes to food?

How much do consumers worry and what is important to them?

When asked about their food issues, spontaneous mentions were highest for two topics : having a healthy diet (12%) and processed food/preparing meals from scratch (11%). The cost of healthy food also ranks relatively high as an issue (9%)

Top food issues



Theme mentioned	%
Healthy / natural	29%
Content – fat, sugar etc.	28%
Personal taste / diet	27%
Quality / taste	16%
Cost / value	9%
Provenance / ethics	9%
Hygiene / contamination	6%
Labelling	5%

Note – these figures include ALL mentions (including those not listed individually in chart)

- ✓ Female significantly higher than male
- ✗ Female significantly lower than male at 95% Confidence level

Note – this is the top 15 topics

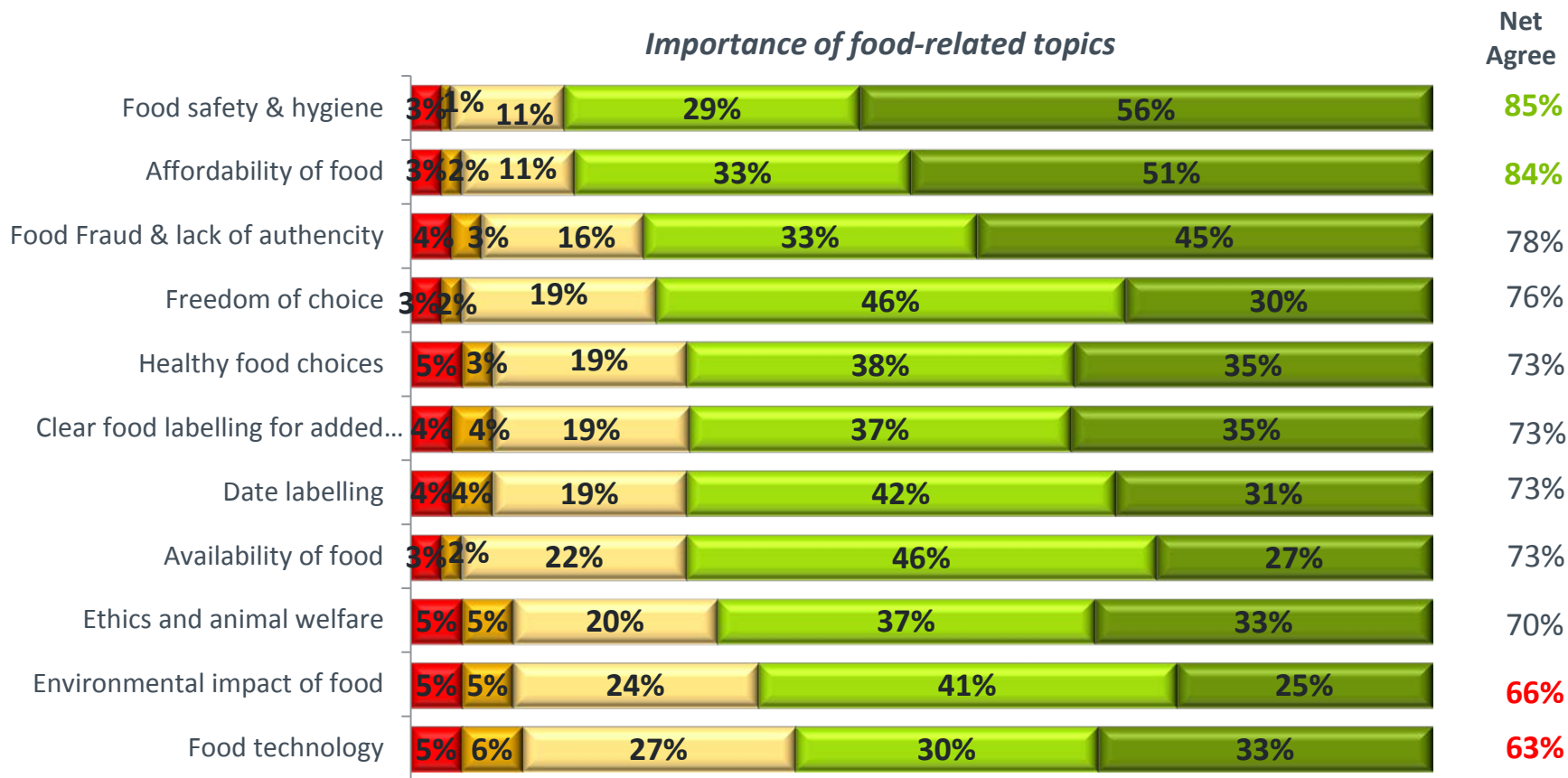
Word Cloud of Spontaneous Themes :
Health, Processed Food, Cost and nutritional aspects such as Fat, Sugar and Freshness dominate

Overview of all food issues – Word Cloud



The bigger the word, the more important the topic

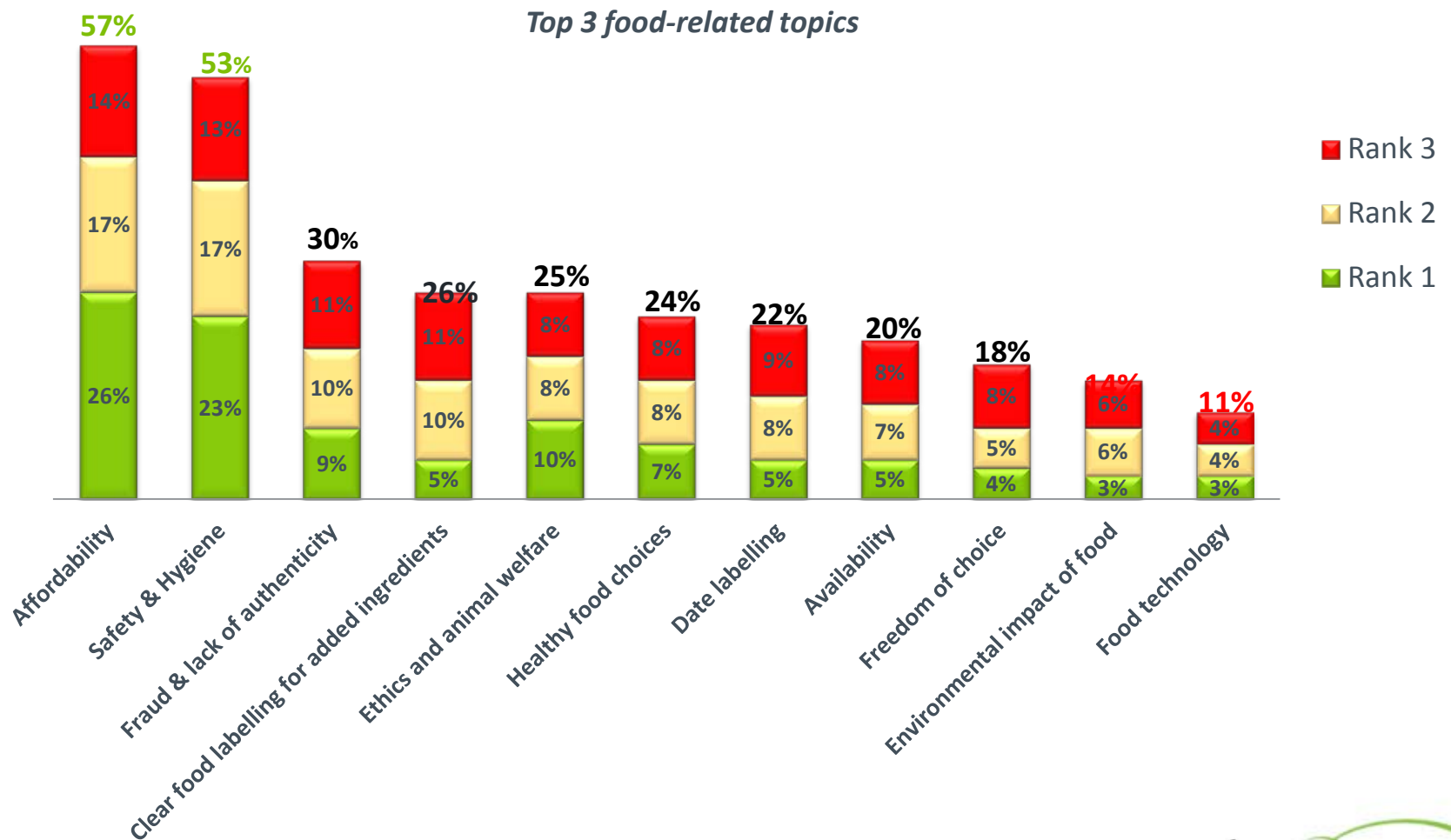
Although all food issues mentioned are deemed important (all over 63%), food safety & hygiene (85%) and affordability (84%) are clear leaders. On the other hand, the environmental impact of food (66%) and food technology (63%) are least important topics



■ Very unimportant
 ■ Unimportant
 ■ Neither important nor unimportant
 ■ Important
 ■ Very important

Q7406 (Q2). How important are the below food related topics to you?
 Base: All respondents: 2,060

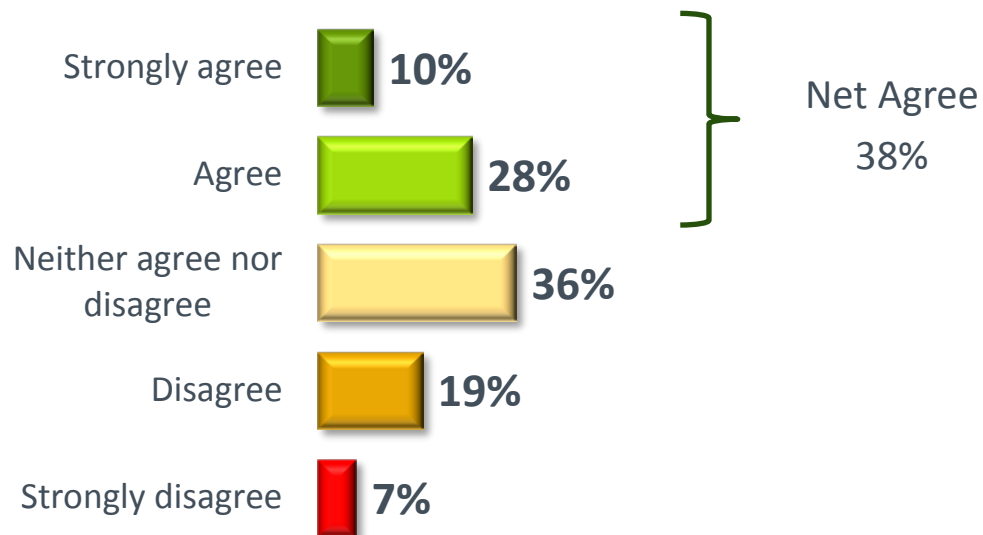
When asked to rank the topics on importance, both affordability and safety & hygiene are ranked as the topics of highest importance by over half (57% and 53% respectively)



Q7410 (Q3) Looking at the same list, please rank the 3 topics that are most important to you, where 1 is most important.
Base: All respondents: 2,060

Over a third (38%) worry about the safety of the food they eat; however a substantial number (36%) don't have a strong opinion

"I worry about whether the food I have is safe to eat"



Women are considerably more subject to worry about food safety than their male counterparts (men 34%, women 42%).

In addition, those aged 16-24yrs are more concerned about whether the food they have is safe to eat than those from the older age categories (46% for 16-24yrs, significantly higher than older age groups)

Q7415 (Q4) To what extent do you agree with the statement: "I worry about whether the food I have is safe to eat"
Base: All respondents: 2,060



Section 2 – Role of Government

What do the public believe the government is responsible for?

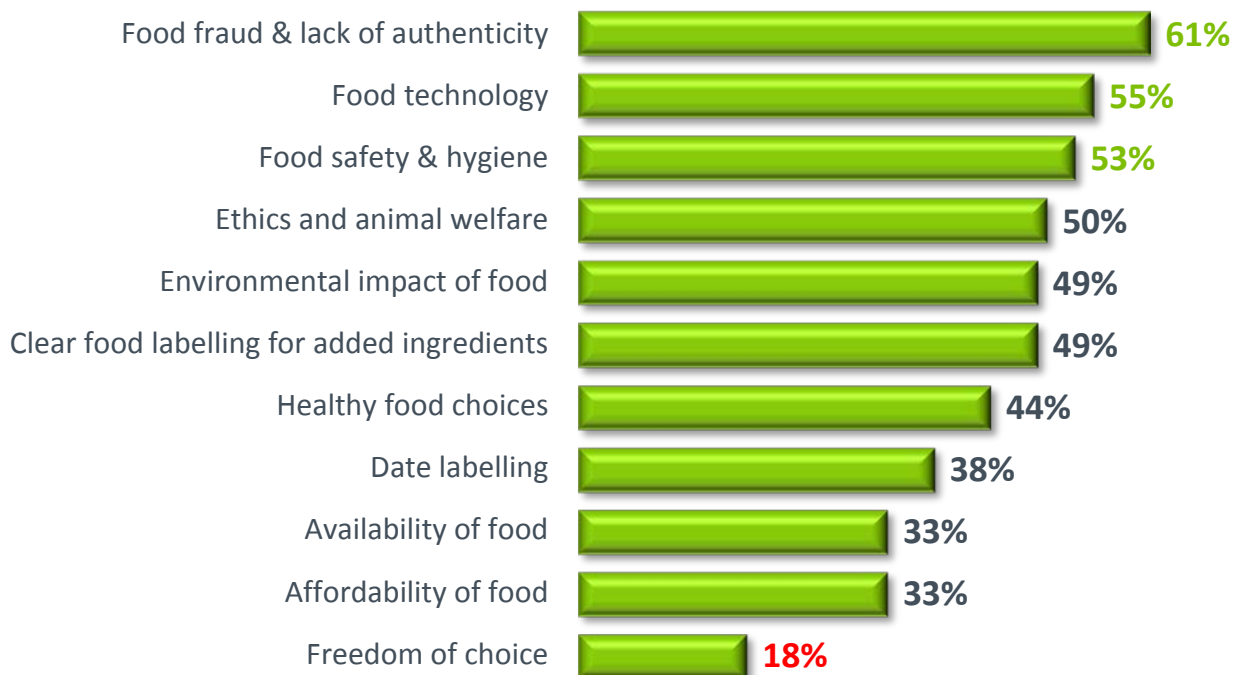
What should the government prioritise?

Any further topics of importance the government should take ownership for?

Awareness of the FSA

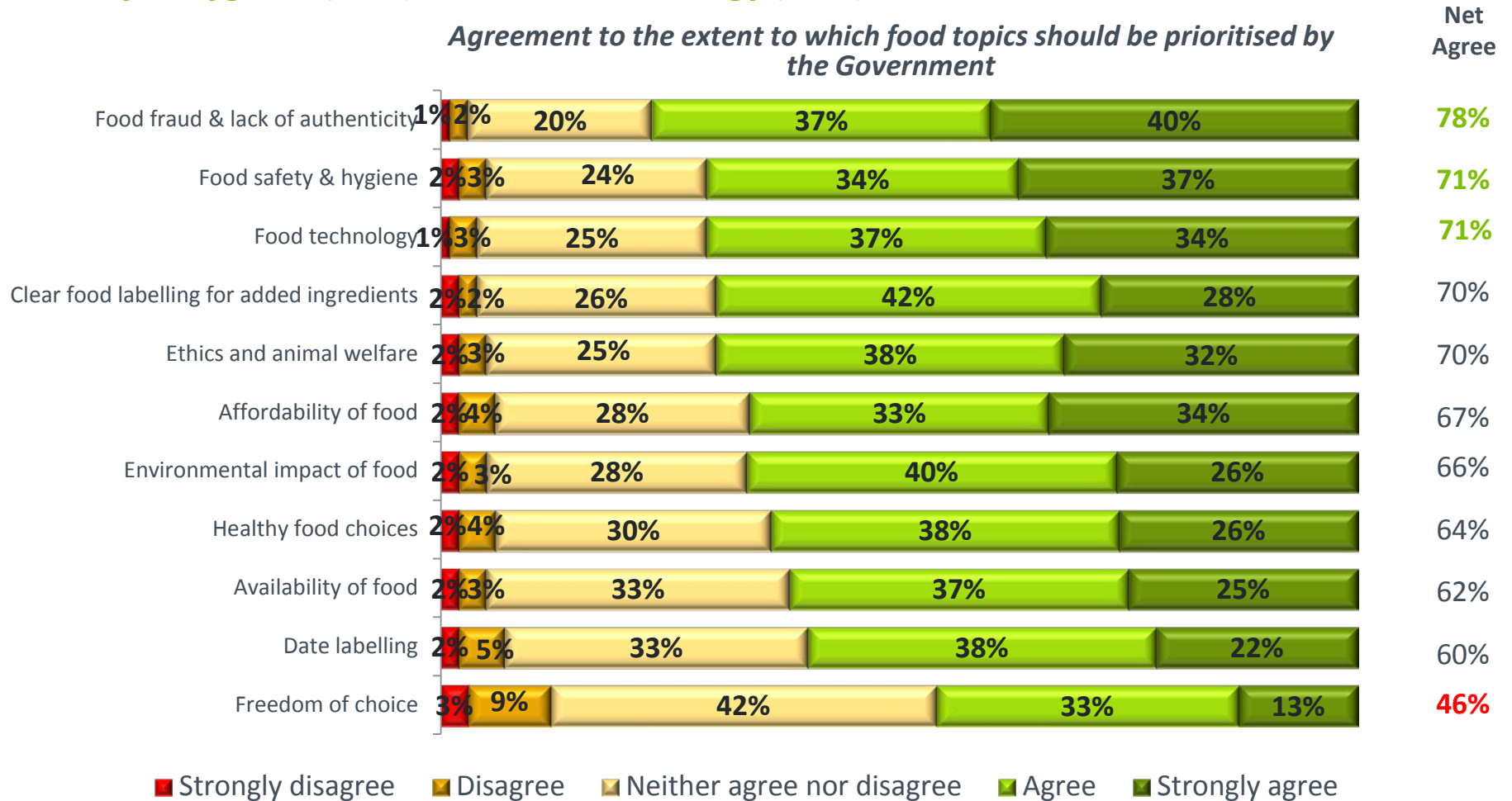
Food fraud & lack of authenticity (61%), food technology (55%) and food safety & hygiene (53%) are considered to be the top 3 issues falling within the responsibility of the Government.

Food-related topic perceived to be the responsibility of the Government



Q7420 (Q5) Looking at the same list of food-related topics, which, if any, do you believe the Government is responsible for?
Base: All respondents: 2,060

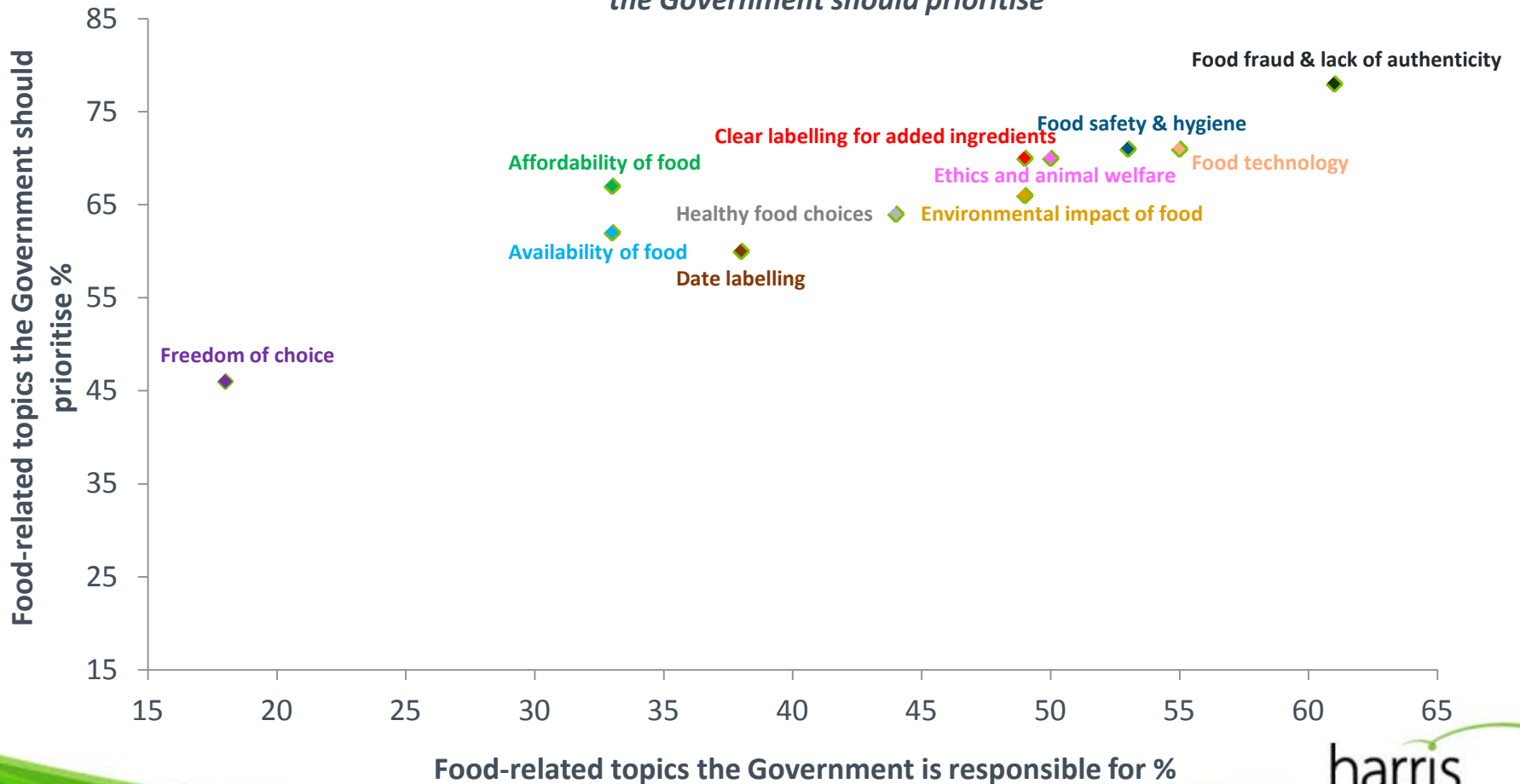
When asked which topics the government should prioritise, the same 3 areas identified in the previous question top the list: food fraud & lack of authenticity (78%), food safety & hygiene (71%) and food technology (71%)



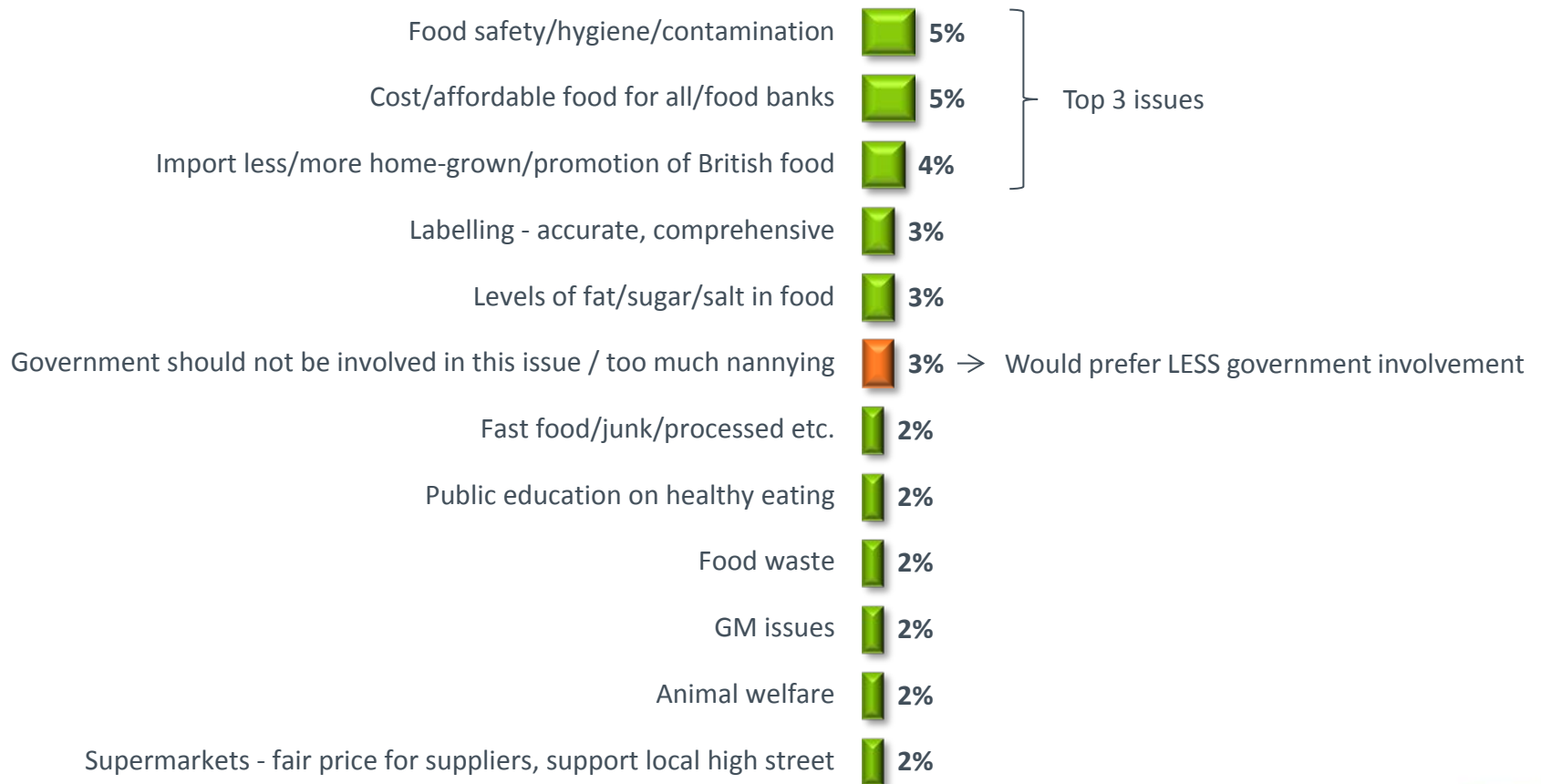
Q7426 (Q6). To what extent do you agree that the Government should prioritise each of these topics?
Base: All respondents: 2,060

Overall, food topics the public think the Government should prioritise are consistent with topics perceived to be the responsibility of the Government, these are : food fraud & lack of authenticity, food safety & hygiene and food technology

Food-related topics the Government is responsible for compared to food-related topics the Government should prioritise



When asked what issues respondents would like to see the Government take greater responsibility for in the next 5-10 years, 64% gave no answer. Food safety, cost (each 5%) and promotion of British food (4%) top the list, but the percentages are very low



Q7430 (Q7) Are there any other food related areas you would like to see the Government take greater ownership for in the next 5-10 years?

Word Cloud of mentions for further food related topics the government should take greater ownership of in the next 5-10yrs

Overview of all other food-related topics of concern perceived to be the responsibility of the government



The bigger the word, the more important the topic

Q7430 (Q7) Are there any other food related areas you would like to see the Government take greater ownership for in the next 5-10 years? Wordcloud based on coded responses

Base: All respondents: 2,060

Verbatim Comments on why the key 3 topics the public think the Government should take greater responsibility for in the next 5-10 years are important

Food Safety/Hygiene (5%)	Affordable Food (5%)	Promotion of British Food (4%)
"Because I don't want to ingest poisonous substances."	"Because if prices were cheaper people would be able to afford a healthy diet and there wouldn't be so much obesity."	"It would stop British farmers being forced out of business by being undercut by foreign imports."
"Ensuring that cleanliness is upheld & that diseased animals do not enter the food chain."	"Everybody should be able to purchase fresh healthy food whatever their budget."	"We should ensure that local produce is available because imported food has a negative effect on our deficit."
"Need to be sure what I'm eating is what I think I'm eating and is safe and wholesome."	"The producers tend to discount unhealthy foods making them more attractive but we should all be eating more healthy diets which are normally more expensive."	"So we keep our farming community alive and thriving."
"I like to know and trust where the food I eat comes from."	"Having enough money to buy food, there should not be one single person in the UK who relies of 'Food Banks' The UK is not a poverty stricken country but those with the wealth will always try to keep it."	"We shouldn't need to import fruit and veg that can be grown locally it's a waste of money, environmentally unsound and means that the produce we access is not so fresh."
"To find out where foods have been produced, prepared and packaged."	"It is important to allow more people to more easily afford food, particularly children who currently receive very little nutritional food."	"Supports local farmers and makes the food more accessible to everyone and also provides a healthier outlook on the food we eat on a daily basis."

Note – These are the top 3 topics,

Verbatim comments from those saying the Government should not be involved in this issue / there is too much nannyng

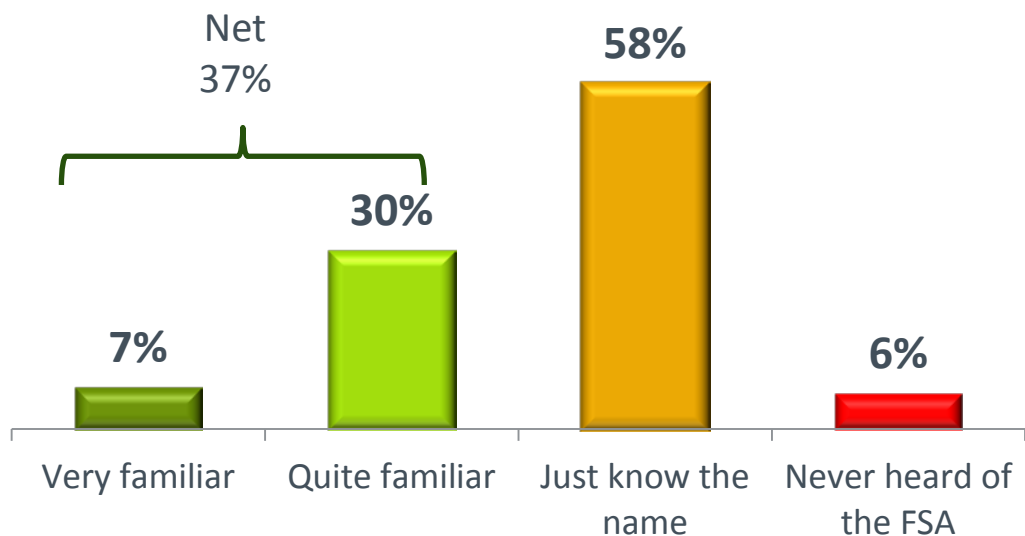
<p>Are there any other food related areas you would like to see the Government take greater ownership for in the next 5-10 years? Government should not be involved in this issue/too much nannyng (3%)</p>	<p>Why is this particularly important to you? Those who said Government should not be involved in this issue/too much nannyng (3%)</p>
<p>"I would just like Government to take great responsibility for the areas they deal with at the moment."</p>	<p>"I think that Government is very good at passing the buck - but they are where the buck stops, and they should make sure that the whole food chain from the products and farmers, through manufacturing and sales, are carefully, humanely, intelligently and effectively controlled."</p>
<p>"I want to see the government take less notice of the demands of the food industry and pay more attention to the opinions of the public"</p>	<p>"too many decisions taken under pressure from the food industry"</p>
<p>"No, I think the Government has enough say in what we can and cannot do or have."</p>	<p>"It should be important to everyone"</p>
<p>"no, there is already too much government interference in our lives"</p>	<p>"because the government has more important things to sort out, such as the economy and unemployment, care for the elderly etc."</p>
<p>"No I don't! They interfere too much now!"</p>	<p>"That I can eat what I want, when I want, how I want without any nanny state interference. "</p>
<p>"I think government already meddles too much in our lives"</p>	<p>"Because we should have freedom of choice"</p>
<p>"don't know, it is also up to people to regulate their own food intake."</p>	<p>"Because companies & governments get blamed because some people cannot stop eating the wrong foods"</p>
<p>"I don't like to see the government getting involved in anything. It's bloated and inefficient already, and running a massive deficit.... People should be treated as adults and allowed to make their own decisions."</p>	<p>"Have you noticed the size of the deficit lately?"</p>

Q7430 (Q7) Are there any other food related areas you would like to see the Government take greater ownership for in the next 5-10 years? / Q7435 (Q8) Why is this particularly important to you?

Base: All saying Government should not be involved in this issue / there is too much nannyng (67)

Over a half (58%) are aware of the existence of the Food Standards Agency, but only know the name. 37% claim to be familiar with the FSA to some extent.

Familiarity with the role of the Food Standards Agency



Those aged 25+ are more likely to be familiar with the FSA compared to those under 25yrs. The majority of respondents totally unaware of the FSA are more likely to be found within the 16-24 age group.

Q7440 (Q9) How familiar are you with the role of the Food Standards Agency (FSA)?
Base: All respondents: 2,060

AHEAD OF WHAT'S NEXT.

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For any questions please contact

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