

EXECUTIVE SUMMARY



OUR FOOD FUTURE

FEBRUARY 2016



TNS BMRB



FOREWORD



CATHERINE BROWN

Chief Executive of the Food Standards Agency

There are huge pressures facing the food system. Increasing global demand and the impacts of climate change are already significantly affecting our food supply.

There is a high degree of consensus that the pace of change is likely to quicken, that its exact effects are hard to predict, and that all of us – citizens, the scientific and business communities, and government agencies – would do well to engage now to try to ensure that we are in the best place possible to take advantage of the opportunities that will come, and to mitigate the risks that are also coming.

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and that citizens are engaged with the issues that affect their food supply and empowered to help shape the system to meet their needs.

We are committed to playing our part effectively, and know that engaging with others who have different perspectives and overlapping objectives, to work out system wide approaches, is a key part of that.

We know that NGOs, citizens, industry and policy makers are already thinking about how they should contribute to a

future food system which provides enough safe, authentic food for us all to have healthy lives now and in the future.

We are looking forward to working in partnership with others as we start to fulfil the commitment we made in our recent strategy review to play our part in supporting the development of the best food future possible.

The Our Food Future project is our opening contribution to what we believe is an important discussion – we look forward to hearing your contribution.

A handwritten signature in black ink, reading 'Catherine Brown'.

ACKNOWLEDGEMENTS

The FSA would like to thank:

- **The steering group**

- Which?
- Wellcome Trust
- Sense about Science
- Sciencewise
- Defra
- Global Food Security
- Food and Drink Federation
- Food Standards Scotland

- **Research and evaluation partners**

- TNS BMRB
- Icarus

We are grateful to members of the FSA Social Science Research Committee for their challenge and scrutiny.

Full report, including a comprehensive literature review and methodology, can be found at www.food.gov.uk/foodfuture



EXECUTIVE SUMMARY

Understanding the public view on an urgent issue

We do not yet know what Our Food Future will bring. However, it is unlikely that we'll simply be able to continue as we are; the difficulties facing us are too great to ignore.

Current consumption patterns demand too much from finite resources; environmental pressures increasingly introduce instability and unpredictability into global supply chains; the global population is set to rise to over 9.5 billion by 2050¹. Can consumers influence how decision-makers respond to these challenges?

This research was commissioned to add to a growing evidence base² on UK consumers' views of the world we live in, where we are headed, and what we want to see from Our Food Future.

Co-funded by the Food Standards Agency, Food Standards Scotland and Sciencewise³, this work focuses on **understanding public hopes, fears and aspirations about what the future could**

look like; exploring people's **priorities and needs**; and their initial expectations about **what should be done**, and by whom.

In doing so, we have not asked our participants to solve the world's challenges for us, or even to offer views on all of the issues we face; our approach has been targeted and selective.

By focusing on consumers' needs and core values, we hope that this research provides an early roadmap for where the UK public would like to go, and how they would prefer to get there.

It is a next step in an ongoing journey – part of a crucial and ongoing effort to ensure public views count in decision making.



GLOBAL POPULATION
IS SET TO RISE TO OVER
9.5 BILLION
BY 2050¹

¹ 2015 Revision of World Population Prospects, United Nations <http://esa.un.org/unpd/wpp/>

² In particular, by the Government Office for Science, Which?, the Global Food Securities Programme, Defra, the Wellcome Trust and the Food Ethics Council.

³ Sciencewise is the UK's national centre for public dialogue in policy making involving science and emerging technology issues, funded by the Department for Business, Innovation and Skills (BIS). Sciencewise aims to improve policy-making involving science and emerging technology across

government by increasing the effectiveness with which public dialogue is used, and encouraging its wider use where appropriate to ensure public views are considered as part of the evidence base: <http://www.sciencewise-erc.org.uk/>



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KEY FINDINGS

People are not yet used to thinking globally about food – but recognise the importance of the challenges we face

- Though there was a wide range of engagement and knowledge levels about the global food system, in general, ‘thinking globally’ about food was new and challenging.

Participants were surprised and concerned to realise they knew so little about the complex global food system. There was a strong desire to know more about the processes that bring food to our tables, in particular:

- the links between our food production systems and climate change;
- the complexity of the global farm to fork process;
- the role of the food industry in shaping global food trends; and
- the role of Government in working with global industry.



THINKING GLOBALLY
ABOUT FOOD WAS NEW AND CHALLENGING

- When confronted with potential future challenges, including scarcity, participants began to interrogate their own consumption patterns and whether these were sustainable in global context.

- Some were inspired to examine the UK consumer lifestyle and consider change, for example by buying less; eating less meat; or re-thinking their demand for non-seasonal food availability.
- Others were reluctant to change their own behaviour. They were most concerned that steps be taken to protect the future food supply in the UK, ideally so that we can maintain our current consumer lifestyles.

Food is a personal and emotive issue.

Throughout the research, participants used their personal experiences and priorities as a lens through which to understand and interrogate the often complex issues at hand.

They remained most comfortable thinking about the impact of global food challenges at the **consumer level**: the impact that developments were likely

to have on themselves, their loved ones, and their communities. In part, this was because the discussion was new territory for them.

With more time and more public discussion, participants thought we might be more ready as a society to change what we do.

THE GLOBAL CHALLENGES?



Participants were surprised and concerned to realise they knew so little about the complex global food system. There was a strong desire to know more

KEY THEMES

Across the research, we witnessed a broad range of opinions among participants – with differences in lifestyle, life-stages, values, social contexts, and geography providing for vibrant discussion and debate

However, both when thinking about what characterised Our Food Present, as well as what they hoped for in Our Food Future, discussion tended to crystallise around four key themes.

Convenience versus connection

- Participants felt that one of the key trends characterising Our Food Present was an increase in **convenience** in relation to food. They noted a rise in ‘instant’ or quick prepare foods; digital technologies enabling faster shopping; a rise in eating out and ‘on the go’ eating, and increased availability and variety of food.
- Convenience was seen to offer clear benefits – enabling modern, busy lifestyles and reducing the time spent on buying, preparing and eating food.



Participants neither wanted a ‘return to the old days’ – i.e. involving a sacrifice of convenience – nor a ‘connectionless future’



- However, there was also widespread concern that convenience can at times come at a cost: a **decrease in consumers' connection to and through the food they eat.**

For example, participants worried about:

- A perceived loss of social connection with food, a move away from making food from scratch and cooking and sharing special meals together. They worried that we are losing opportunities for cultural transmission via the food we eat;
- Increasingly complex, fragmented food production and retail processes. People felt that as the food system is becoming more opaque, consumers are losing connection with where their food comes from and how it gets to their tables.
- Increase in waste. There was concern that if we value and connect with food less, we are more likely to waste it – with obvious detrimental impact on the environment and the sustainability of the food supply.



PEOPLE FELT THAT THE FOOD SYSTEM IS BECOMING MORE OPAQUE



There was also widespread concern that convenience can at times come at a cost: a decrease in consumers' connection to and through the food they eat

- Looking to the future, participants largely expected that market forces (including the influence of the food industry and marketing, but also consumer demand) would result in a further shift towards convenience in our relationships with food. Some participants welcomed this, others expressed real concern and a sense of loss.
- The future scenarios explored in research helped to confirm that participants neither wanted a 'return to the old days' – i.e. involving a sacrifice of convenience – nor a 'connectionless future.' They felt it was critical that as Our Food Future develops, a careful balance is struck.



PARTICIPANTS WORRIED ABOUT

- **A LOSS IN SOCIAL CONNECTION**
- **AN INCREASE IN FOOD WASTE**
- **LOSING TOUCH**



Health and quality versus price

- A key issue that participants raised was around how to strike a balance between health and quality, and price:
 - On one hand, participants felt that it was critical that consumers have access to nutritious and 'healthy' food – associated with fresh, natural 'whole foods'.
 - On the other hand, people recognised that consumers are drawn to cheaper food and were concerned about potential long-term health impacts from processed food consumption.
- Participants expressed anxiety that food is becoming a 'class issue' – increasingly perceiving a divide between the 'haves' and 'have nots' in terms of the kind of food they eat.
- Participants expected that this trend would continue in the future, and even worried about a 'two-tier' food society. They were eager for intervention to help ensure that all consumers can make healthy choices and have access to whole, affordable, nutritious foods – even if they don't always choose to have them.

“Participants felt that it was critical that consumers have access to nutritious and 'healthy' food”



- Many were hopeful about the potential for nutraceuticals⁴ and technological developments to help us support global nutrition, although there were some concerns about the 'unnaturalness' of synthetic food production.

However, most viewed developments in this area positively, so long as development supplemented, rather than substituted, healthy diets – and consumers could choose to eat these kinds of foods or not.



PARTICIPANTS EXPRESSED ANXIETY THAT FOOD IS BECOMING A **'CLASS ISSUE'**



A key issue that participants raised was around how to strike a balance between health and quality, and price



⁴Nutraceuticals, or 'functional foods' – food with natural or artificially added nutritional value or health benefits.



Information, education and transparency

- Participants felt that one of the most positive evolutions in Our Food Present is the trend for increased information and education available about the food we eat:
 - People felt they were more aware of their food than people had been in the past – e.g., a rise of interest in health and nutrition, and discussion of food and health in schools. Some hoped that this would produce more educated consumers in the future.
 - Increased clarity in labelling was widely praised (e.g., around allergies; fat; salt and sugar; and additives). This kind of information was considered a key consumer right, even if sometimes this was a ‘right to ignore.’ Clear labelling helped consumers feel confident that they could make empowered choices about their food – and reassured them that the food industry was being encouraged to act in consumers’ interest.
- In the future, consumers hoped the food industry might provide additional information to support decision making on a wider range of food issues – e.g. food labelling including information about the global environmental impacts of production.
- Ultimately participants wanted people to be educated about the challenges facing the food system, so that they can make more informed decisions about food. And they wanted the skills and education to be able to navigate the food market and make healthier choices.



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HOPES AND FEARS?



Power, trust and empowerment

- Participants tended to ascribe the most influence and power to market forces in shaping Our Food Future; followed by Government; and then the public. However, this hierarchy was the reverse of who they most trusted to keep the public's best interests to heart.
- As they reflected on the global food market, participants typically became more concerned about the role of large food businesses. They sought reassurance that limits could be set around the proportion of the food chain influenced by profit, seeing this as potentially detrimental to consumers, public health and the environment.
- Participants were largely unaware of the exact role of Government and regulators in relation to protecting consumers' interests – in the UK or globally. Although there was a sense that 'someone' was protecting food safety, there was much less certainty about what was being or could be done around ensuring the availability of affordable, safe, healthy food, or ensuring transparency in food marketing.
- Looking forward, people wanted much more visibility from Government in terms of its role in protecting consumer interests – particularly in terms of providing checks and balances to corporate power.
 - People hoped that Government would push harder to support public interests via education and information support, but also intervention in marketing and retailing that promoted unhealthy or wasteful food choices.
 - Participants expected that global governments would work together cooperatively to address the global challenges facing the food supply. However, they also had concerns about the feasibility of impact given limited budgets and the complexity of the challenge.
- Participants had divergent views regarding the role of consumers in shaping the world we live in. Some took a very passive approach, assuming that nothing they could do would result in any real change. Others viewed food more

politically, assuming more impact of both individual choices and coordinated consumer action. Regardless, participants widely hoped that consumer interests would be taken into account as Our Food Future develops – and relied on Government to protect their interests on their behalf.



THEY SOUGHT REASSURANCE THAT LIMITS COULD BE SET AROUND THE PROPORTION OF THE FOOD CHAIN INFLUENCED BY PROFIT



People wanted much more visibility from Government in terms of its role in protecting consumer interests



Participants expected that global governments would work together cooperatively to address the global challenges facing the food supply

What do consumers want done to secure the future they want?

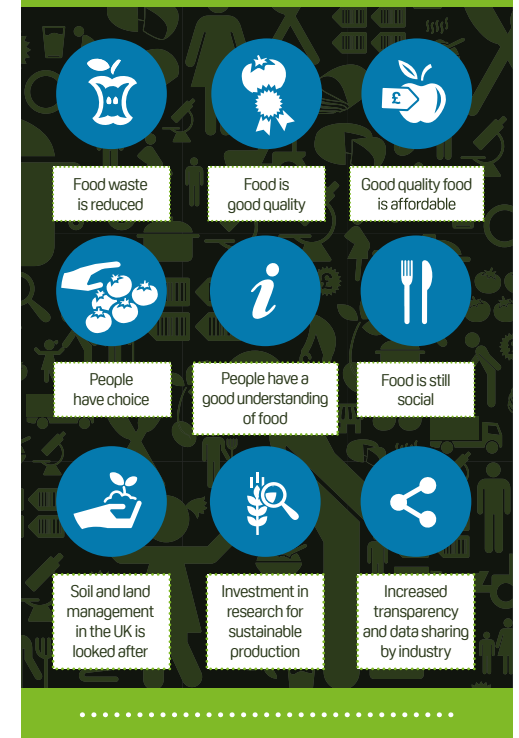
- After reflection, debate and discussion, participants generally shared the same vision for a positive Food Future. They wanted:
 - To ensure that consumer interests are protected even amidst growing complexity and the rising influence of transnational power;
 - To preserve a balance between convenience and connection with food;
 - A reduction in food waste – at every stage of production and consumption;
 - To ensure that consumers are able to afford good quality food that supports consumer health;
 - To be provided continued access to safe and healthy food, as well as variety and easy availability of food;
 - Consumers to have access to the information and education they needed to make empowered choices about food;
 - Increased transparency and awareness of what is in our food, and how it gets to our plates;
 - Continued investment in research for sustainable production techniques and new food innovations; and

- Government to intervene to ensure that consumer interests are protected as necessary – e.g., in terms of protecting the stability of UK soil and agriculture and our food supply chains.
- Participants varied in terms of how much **responsibility and authority they thought consumers should have** in terms of generating the Food Future we wanted. Those that were willing to take responsibility believed consumers should:
 - Start to reduce waste at a household level;
 - Use education to transfer key cooking skills and food traditions; engage in more sustainable consumption patterns (e.g., buying locally or seasonally, or eating less meat);
 - Use the information provided to them to ‘vote with their feet’ to place pressure on industry (e.g., wastage, perceived unhealthy foods, or practices with negative impact on the global environment); or
 - Potentially even organise consumer efforts to demand action from Government and industry to respond to global challenges.



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WHAT PEOPLE WANT?



WHO SHOULD DO WHAT?

Help reduce waste at all stages of the food production journey and help educate consumers



INDUSTRY

Join up to develop strategy for safeguarding food supply, production and sustainability in the future



GOVERNMENT

Reduce waste, teach the next generation and consider changing their consumption habits



CONSUMERS

Start a conversation that informs better choices



MEDIA

- There was a strong desire for more **national conversation** about the challenges facing our food system. Participants recognised that it was unlikely that the UK public would spontaneously educate themselves, and so were eager for ongoing and widespread dialogue via all forms of consumer media and information support.

- They hoped that broad and continuing coverage – across documentaries, TV programmes, newspapers, political messaging, food labelling and so on – would help ‘cut through’ and force our society to face uncomfortable issues.

- Participants thought that the food industry's responsibilities centred on working collaboratively to reduce food waste at all stages of the food chain – from production techniques to retail and marketing practices.

They also desired increased transparency about what is in our food, and about the processes and systems which bring food to our tables.

Participants wanted more than just data provision; they hoped that the food industry would play a critical role in consumer education, raising awareness of global challenges and empowering consumers to make better decisions about food.

- Finally, participants hoped that **Government** would play a highly visible role in Our Food Future, in terms of:

- Holding industry to account and protecting consumer and global interests – in relation to health and safety; food quality; sustainability of the food supply; and environmental impact;
- Increased communication with consumers about any actions taken to protect consumer interests;
- Efforts to tackle public obesity and overall public health by ensuring access to healthy, convenient food options;
- Support for education around cooking skills, making healthy choices, and understanding the challenges we face; and
- Coordinating global strategy and action to intervene in global challenges to the food supply.



INCREASED COMMUNICATION WITH CONSUMERS ABOUT ACTIONS TAKEN TO PROTECT THEIR INTERESTS



Participants hoped that Government would play a highly visible role in Our Food Future

METHOD AND APPROACH

The research was developed in an iterative fashion across:

- **a scoping exercise**, consisting of
 - an online quantitative survey of 1,383 UK participants, and
 - online qualitative forum research with 22 participants
- **a deliberative dialogue** involving a total of 63 participants across London, Cardiff, Edinburgh and Belfast – with participants engaging in two in-person workshops in each location.

A range of stimuli and perspective-taking exercises were used to help encourage and inspire debate.

This included the use of ‘scenario’ exercises in which participants were asked to imagine living in four very different projections of Our Food Future – in order to help challenge assumptions, identify priorities, and encourage participants to consider the implications of differing trade-offs within and between the scenarios.

1,383 UK

ONLINE QUANTITATIVE
SURVEY PARTICIPANTS



22 ONLINE QUALITATIVE
FORUM RESEARCH PARTICIPANTS



A range of stimuli and perspective-taking exercises were used to help encourage and inspire debate



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