

FULL REPORT



# OUR FOOD FUTURE

FEBRUARY 2016



TNS BMRB



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# 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.

The Food Standards Agency exists to put consumers first – to try and ensure that the interests of the people who eat food are properly understood and protected,

“ The Food Standards Agency exists to put consumers first – to try and ensure that the interests of the people who eat food are properly understood and protected ”

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](http://www.food.gov.uk/foodfuture)



# 1.0 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 2050<sup>1</sup>. Can consumers influence how decision-makers respond to these challenges?

This research was commissioned to add to a growing evidence base<sup>2</sup> 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 Sciencewise<sup>3</sup>, 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 2050<sup>1</sup>

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

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

<sup>3</sup> 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/>



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

# 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 nutraceuticals<sup>4</sup> 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



<sup>4</sup>Nutraceuticals, 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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**Ultimately participants wanted people to be educated about the challenges facing the food system, so that they can make more informed decisions about food**

## 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.



Participants varied in terms of how much responsibility and authority they thought consumers should have in terms of generating the Food Future we wanted

## 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

# 2.0 INTRODUCTION

## 2.1 Introduction and background

Today's population of about seven billion is likely to rapidly rise over the coming decades, potentially to over nine billion by 2050.<sup>5</sup> And, of course, all of those people will need to eat – and to do so in a way that is safe, sustainable, and ideally health-affirming.

The global citizens of today are faced with the urgent challenge of how to feed more people within the reality of finite resources. As we plan for the future, we need to respond to growing uncertainty and unpredictability in relation to global challenges around sustainability, climate change, water shortages, over-consumption and waste.

One of the driving principles of the FSA is that consumers have the right to the best food future possible, and should be empowered and informed to be active players in shaping that system.

Specifically, it wishes to support consumers to: 1) feel **empowered** to make informed decisions about food – now and in the future; and 2) consider how future changes might

**impact** them – in terms of both their immediate and longer-term interests.

In light of a desire to ensure that the consumer voice is included in ongoing decision making about Our Food Future, FSA commissioned research from specialist social research agency TNS BMRB.

This work was designed to understand the key consumer concerns, aspirations and values which characterise their current relationships with food – and to understand their priorities for how Our Food Future develops.

The evidence and insight reported here is gathered from a highly iterative research project, including both quantitative and qualitative scoping exercises, as well as a series of deliberative workshop events with public participants from across the country.

Further details of the exact research aims and approach taken are contained in Section 3.0.

## 2.2 Building on existing evidence and expertise

In conducting this research, we were supported by an extensive network of partners and contributors, all of whom have informed the questions asked and the materials used to explore the public's view.

This included the ongoing involvement of an expert Steering Group established by the FSA, including representatives from Defra, Which?, Government Office for Science, Wellcome Trust, Sense about Science, Sciencewise, Global Food Securities Programme and the Food and Drink Federation.

We have also benefitted greatly from a wide range of recent work on 1) the challenges facing our food supply, as well as emerging opportunities, and 2) consumer views on the future of food and the acceptability of potential solutions to safeguard the food supply.

We offer our thanks to the Government and scientific bodies who have recently undertaken extensive research on some of the challenges we face as we advance towards Our Food Future – including reports from the Government Office for Science,<sup>6</sup>

“This work was designed to understand the key consumer concerns, aspirations and values which characterise their current relationships with food – and to understand their priorities for how Our Food Future develops.”

5. Government Office for Science Foresight Report (2015). The Future of Food and Farming: Challenges and choices for global sustainability. [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/288329/11-546-future-of-food-and-farming-report.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/288329/11-546-future-of-food-and-farming-report.pdf)

6. Ibid.

“We also seek to represent the tensions, questions and viewpoints that emerged as a result of discussion, debate and reflection.”

the European Union’s Joint Research Centre<sup>7</sup> and WRAP (Waste, Resources and Action Programme).<sup>8</sup>

These works have offered clear-sighted insight on the range of urgent issues facing our food supply; the sustainability of production processes; and global environmental and economic pressures resulting from climate change.

Likewise, this work represents a further contribution to a steadily growing evidence base on the public perspective on the future of food. Since Which? called for more public engagement on food issues in 2013, several deliberative pieces of work have considered what citizens’ worry about and want in relation to the future of food.

These include reports from Which? and the Government Office for Science,<sup>9</sup> the Wellcome Trust and from the Food Standards Agency.<sup>10</sup> These reports have highlighted some of the gaps in consumer understanding and knowledge of the challenges and issues related to the future of food – for example, in relation to food security and resource scarcity.

This work also provided indications about the areas in which the public are most keen

“There are clear threads of commonality across the range of work conducted in this area.”

for further information and engagement from Government and the media.

As you will find in the reporting to follow, there are clear threads of commonality across the range of work conducted in this area. For example, both this and previous work indicates that consumers are only at the beginning of engaging with the complex issues of where their food comes from, and global impacts of this.

There was clear desire for increased information and education around food and the challenges facing us. In this reporting, where our findings have strongly resonated with work conducted previously, we have indicated this.

At the same time, this work also breaks new ground in terms of its focus. We have aimed to put consumer needs and priorities at the heart of the research process and reporting throughout.

In doing so, we have prioritised understanding consumers hopes, fears and concerns

related to where we are headed – not focusing on asking for their opinions about various challenges or potential solutions, but on what they hope the future will look like, and what they most care about as this future takes shape.

## 2.3 How to read this report

### Evidencing evolution in views

This report attempts to give the reader a sense of the overall ‘journey’ that our participants went on when thinking about Our Food Future. In doing so, we evidence participants’ spontaneous and most pressing concerns; to give light to the experiences and values which drove their first reactions to the challenges under discussion.

But we also seek to represent the tensions, questions and viewpoints that emerged as a result of discussion, debate and reflection.

This report begins in Section 3.0 by outlining our research methods, including a summary of the approaches and materials used to underpin discussions. Detail is provided separately in the Appendices.

7. European Commission, DG Joint Research Centre (2015). Global Food Security 2030: Assessing trends with a view to guiding future EU policies. <http://publications.jrc.ec.europa.eu/repository/bitstream/JRC94867/lbna27252enn.pdf>
8. Waste, Resources and Action Programme (WRAP). (2015). Food Futures: from business as usual to business unusual. <http://www.sciencewise-erc.org.uk/cms/assets/Uploads/Which-GOS-Food-Report-FINAL6.pdf>. From the 15 topics identified in the report as having importance in delivering a more sustainable, resilient UK food system in the coming decade, there are several that align quite closely with the areas explored in this research, including: *Unlocking new value from waste, Farming for the Future, Climate Risks to food chain resilience, Conscious food choices, Redefining grocery retail models, Food chain data revolution.*
9. Which? and Government Office for Science (2015). Food System Challenges: Public Dialogue on food system challenges and possible solutions. <http://www.sciencewise-erc.org.uk/cms/assets/Uploads/Which-GOS-Food-Report-FINAL6.pdf>
10. E.G. FSA and TNS BMRB (2014). FSA Strategy 2015-2020. <http://www.food.gov.uk/sites/default/files/fsa-strategy-research-report.pdf>



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In Section 4.0, we then focus on participants' views of 'Our Food Present'. This includes discussion of participants' immediate and personal perspectives about what characterises the world we live in now, but also their response to consideration of some of the key global challenges. In Section 5.0, we then explore views on Our Food Future. We evidence participants' immediate expectations about where we are headed and why, but also include detail on their more informed opinions. Finally, Section 6.0 provides a summary of informed views around what they wanted Our Food Future to look like – and what needs to happen to secure the future they want.

It is important to emphasise that this piece of research is not intended to be representative or statistically generalisable to the wider population.

There are of course some voices absent from the debate, and there is more work to be done to understand how various groups in the public space interrogate and engage with the challenges facing us as global citizens and individual UK consumers.

Likewise, we have no intention of presuming that there is one 'public', or one 'public view' in relation to Our Food Future. Instead, this report seeks to pull out the key themes that emerged across discussions with the participants involved in this research and highlighting key points of consensus and debate.

## Representation and representativeness

.....

In this research, we witnessed a rich variety of participant contexts – with differences in lifestyle, life-stages, values, social contexts, geography and so on all providing for vibrant discussion. However, we also observed points of striking similarity – both around what participants felt characterised 'Our Food Present' and the hopes and fears they shared around the potential shape of Our Food Future.

Participants across workshops, in different locations and from different walks of life, noted many of the same key trends; they heralded the same range of benefits of new technologies and opportunities, but also raised the same anxieties; and they tended to identify the same kinds of drivers as shaping our food landscape.

In the spirit of representing these points of commonality and shared vision, our reporting has not taken the path of drawing the reader's attention to every point of debate or difference of opinion. We ask you to take for granted that every participant added their own nuance to the collective view that you see represented at many points in reporting.

At the same time, where views have obviously diverged and split – for example as a factor of age, socioeconomic differences, or personal values around food – we have provided some indication of this.



.....

**“We ask you to take for granted that every participant added their own nuance to the collective view that you see represented at many points in reporting.”**

# 3.0 RESEARCH DESIGN

## 3.1 Research aims and objectives

The overarching aims for this work were to bring the consumer voice to the heart of conversations about food for the public, Government and industry, as well as establish a credible starting point for further dialogue with consumers about emerging risks, issues and questions posed by food systems.

This focus on core **consumer values** was key to the research design – with the idea that once established, these could have wider applicability to other food issues consumers may face in the future.

Rather than taking a broad approach to a vast and complex topic area – spanning climate change, food security, and global co-operation – the research focused in depth on a targeted number of topics<sup>11</sup> in relation to the future of food.

This focused approach allowed researchers to explore nuanced tensions in public views; to challenge and deepen views via discussion, debate and reflection; and to explore views on trade-offs and consumer priorities.

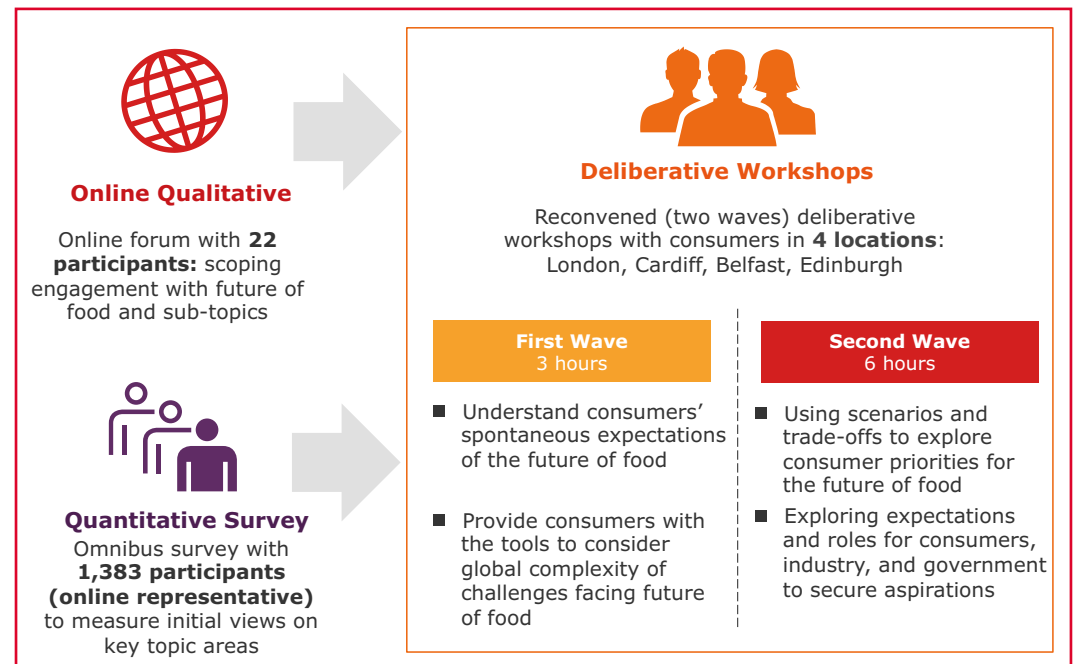
## 3.2 Methodology in summary

Research was conducted over three stages, as outlined below:

The benefits of taking this mixed-method, multi-phase approach was to:

- build on existing research in this area, utilising existing knowledge about how consumers engage with the issues (including where they might struggle);
- provide the opportunity to test stimulus ideas with consumers prior to the

“The overarching aims for this work were to bring the consumer voice to the heart of conversations about food for the public, Government and industry.”



### Overview of the research method

11. These included 1) Global food **systems** and **supply chains**; 2) Food **production** processes, including potential innovations to increase yields in the future; 3) **Health and nutrition** – i.e., the challenge of how to feed a growing population a healthy, nutritious diet; 4) Food **innovation**, covering a number of technological solutions currently in development or relatively close to application; and 5) Issues of **food authenticity**, including issues such as mislabelling, food crime and fraud. These topic areas were agreed with the FSA and partners Oversight Group. Topic choices were based on gaps in the evidence base on consumer perceptions of the future of food, identified by the early stages of the literature review (see Appendices for detail).



deliberative workshops, and filter topic areas based on those respondents found most resonant and engaging;

- understand spontaneous views and concerns about the future of food; and
- allow the time and space for participants to deliberate on complex issues in the main stage deliberative workshops.

Each stage is briefly summarised as follows. Full details of our methodology for the events, including research materials used, are contained in the Appendices.

### 3.3 Scoping stage: Online qualitative forums

Before producing stimulus materials and final discussion guides for the deliberative workshops, TNS BMRB conducted an online qualitative research forum of **22 participants**<sup>12</sup> in order to:

- explore responses to some of the key themes and sub-topics that were to be included in the deliberative materials, in order to identify productive ways of introducing and discussing these;
- gain an initial understanding of consumer perceptions of the key topics, in order to inform and triangulate our understanding of the findings from the deliberative workshops.

Participants logged into an online forum and reviewed stimulus materials, recording their spontaneous responses in terms of their familiarity with the topic, level of concerns it raised, and any areas they found confusing or difficult to engage with. Findings from the qualitative scoping stages informed the questionnaire design for the survey.

### 3.4 Scoping stage: Online omnibus survey

The quantitative research was carried out via an online omnibus approach with an internet-representative panel of 1,383 participants.<sup>13</sup> Respondents completed a 10-minute questionnaire online, covering:

- spontaneous perceptions of the challenges facing the food system (if any)
- levels of current concern about each of the topic areas
- whether the issues were expected to become more or less prevalent over the next 10-20 years.

Results from both phases of the scoping stage were systematically analysed by researchers, and used to filter and refine the topic areas taken into the deliberative phase of research. Researchers identified ‘hooks’ for effective engagement (e.g. the ideas that were particularly effective in conveying a complex idea), and filtered out

issues that confused respondents or detracted from the overall topic.

### 3.5 Main stage: Deliberative workshops

The deliberative workshops were held in four UK locations: London, Cardiff, Edinburgh and Belfast.<sup>14</sup> They took place over two waves, with the same group of participants returning



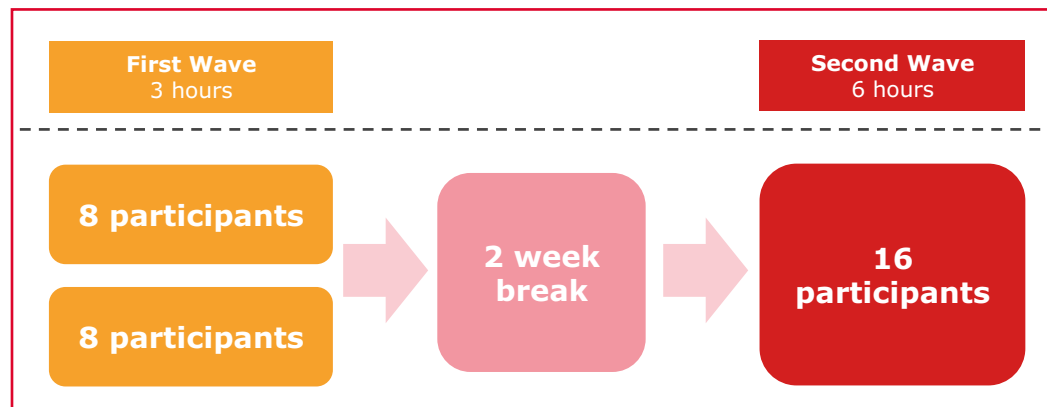
“The deliberative workshops were held in four UK locations: London, Cardiff, Edinburgh and Belfast.”

12. Participants were recruited to reflect a broad spread of demographic variables, including gender, SEG, age and ethnicity.

13. The quantitative sample was designed to be representative of the general population, based on the ONS Mid-Year Population Estimates 2014.

14. These locations were chosen to achieve coverage across UK nations. Full demographic breakdown is provided in the Appendices.

“Moderators used a range of stimulus materials, videos (representing the views of expert stakeholders, in lieu of having experts present in the room).”



## Structure of the workshops

after two weeks to attend the second workshop. A total of 63 participants took part, with 16 recruited in each location.

There were two groups of eight participants in the first wave of workshops. After two weeks, these groups came together in the second wave workshops as a large group of 16, for a full day. (See above).

## Wave 1 workshops

The first workshops aimed to:

- Explore participants' spontaneous perceptions and expectations about the future of food;
- Provide participants with information about food system challenges, and explore their responses to this;

- Provide participants with the knowledge and tools to engage with complex issues in the next wave of workshops, where they were likely to have little existing awareness or knowledge – particularly around the complexity of the food system and the role of Government and transnational corporations; and
- Understand how participants engage with complexity.

Moderators used a range of stimulus materials, a recorded video (representing the views of expert stakeholders, in lieu of having experts present in the room) and a topic guide to hold open, semi-structured group discussions. In the interim period between workshops, participants were given a short task to complete – to speak to a friend or family member about some of the issues discussed.

“Participants were encouraged to explore implications not only on UK consumers, but on the global consumer and food system.”

## Wave 2 workshops

The full day workshops brought the two groups together, and were run as a mixture of plenary sessions and moderated discussions. Wave 2 aimed to:

- Understand participant priorities for the future of food;
- Explore how priorities were weighed up in relation to specific scenarios and innovations in the food system;
- Understand how views had changed over the course of the process; and
- Explore participants' expectations for the roles of various players in the food system, including consumers themselves.



- Though there is a great deal of research activity around the future of food, this research is different in its usage of scenarios as a tool to help participants visualise and think through some of the future issues that consumers may face. Existing scenarios (developed by the Food Ethics Council<sup>15</sup>) were adapted to make them consumer-friendly, engaging and accessible (see below).

Participants explored three out of four scenarios adapted for this research, exploring within each how they would feel, what would be important to them, the perceived benefits, and what raised concerns.

Participants were encouraged to explore implications not only on UK consumers, but on the global consumer and food system. Certain technologies and future changes

(such as nutraceuticals,<sup>16</sup> DNA tracking,<sup>17</sup> and open data from supermarkets and the food industry<sup>18</sup>) were explored in the context of these future ‘worlds’.

Following in-depth exploration of the scenarios, participants were brought together for a final discussion of their priorities for the future and to reflect on how they had changed in terms of the way they viewed the food they bought and ate.

Workshop sessions were audio-recorded and the data analysed using researcher debriefs, notes and matrix-mapping techniques. Further analytical detail is provided in the Appendices.

In line with Sciencewise’s principles for effective public dialogue, the workshops were independently evaluated by Icarus, a consultancy organisation specialising in the design, facilitation, delivery and evaluation of similar dialogues and decision making processes. This evaluation will be published on the Sciencewise website once completed.

“Workshop sessions were audio-recorded and the data analysed using researcher debriefs, notes and matrix-mapping techniques.”



## Visuals of the scenarios used in workshops

15. Scenarios were adapted following guidance from experts from the Futures Company. Detail of our development process is contained in the Technical Appendix.
16. Scenarios were adapted following guidance from experts from the Futures Company. Detail of our development process is contained in the Technical Appendix.
17. Foods that (either due to natural or artificial processes) contain benefits other than purely nutritional value.
18. The use of trace DNA in food production in order to mark a product, allowing it to be traced through the supply chain. Food industry making available information about the transport and production of their produce.

“I’ve learnt a lot of things today and I’ll probably look at things slightly differently. Before we started talking about it, I wasn’t even thinking about the vast amount of people to be fed, the damage to our world that is happening.”  
(Female, Belfast, Wave 1)

## 4.0 WHAT DO PEOPLE SAY ABOUT FOOD?

### Key Findings

The global challenges facing Our Food Future are complex and often complex and difficult to talk about. At the same time, everyone has a personal investment in that future, because it will have real impact on our day-to-day lives. The personal and social perspective is a critical one when people consider our world and what they want the future to look like; people consider the future as individuals first, not as ‘global citizens.’

Food is an incredibly complicated issue – but also one that is highly personal, emotive and social.

Everyone eats, and everyone needs to make daily decisions about how they will use the time and money they have to buy, prepare and consume the food that will sustain and nourish them.

Although participants across this research recognised that food is an issue of global economic, political and environmental importance, it was the personal and social

side of food which tended to drive their spontaneous reactions, considerations and concerns.

That is, they initially judged the merits and downsides of ‘Our Food Present’ in terms of the perceived benefits and challenges it presented for them, their families, and their local communities.

When thinking about an issue of such personal importance, participants defaulted to the known and the personal as a way of making sense of the complex issues at hand. It is also a trend that we have seen repeated across a range of both quantitative and qualitative explorations of UK citizens’ interests, values and concerns in relation to food.<sup>19</sup>

It is critical that decision makers in this area recognise how people evaluate the current state and potential future of food. We must keep in mind that people think as humans first – not as ‘global consumers’ – with personal impact at the forefront.

That is not to say that participants in this research weren’t also interested in ‘macro’

food issues such as sustainability, environmental degradation, and scarcity.

However, engagement and knowledge varied widely across the sample. Most people were not used to – and were often less comfortable – thinking about and discussing issues such as the global production systems and supply chains which deliver the food that we eat here in the UK.

Although interested in issues like the impact of food production on the environment, global food waste and scarcity, many found it challenging to consider the means by which we might take action to achieve the global impacts we would want on these issues.

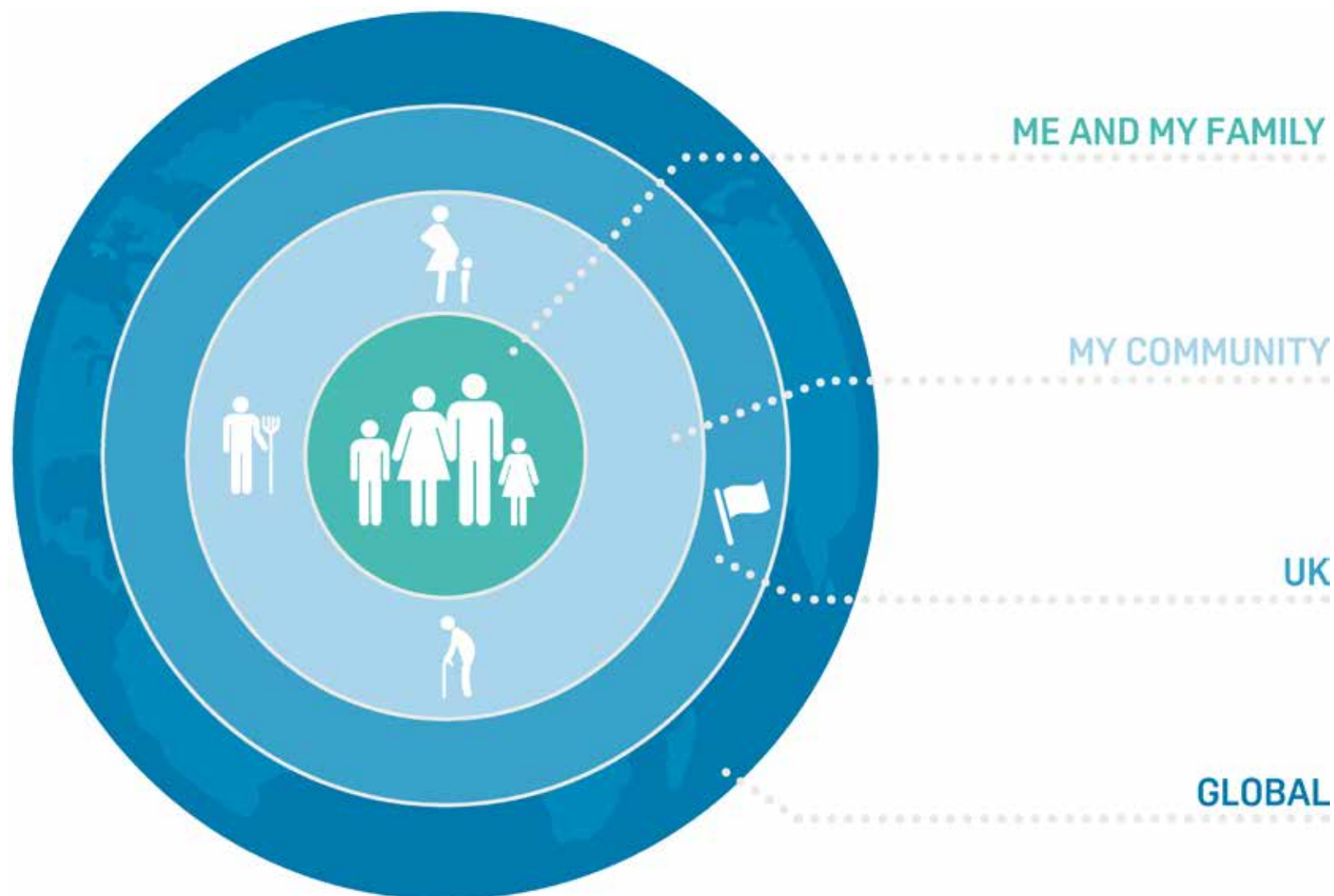
As we will discuss, this is in part because participants felt that these kinds of global perspectives are not currently part of the public consciousness in the UK. This meant that it was often the first time that participants had considered and begun to form views of some of the very complex issues and challenges at hand.

19. For example, in Which? and Government Office for Science (2015). Food System Challenges: Public Dialogue on food system challenges and possible solutions; and in FSA and TNS BMRB (2014). FSA Strategy 2015-2020.



Participants felt that exercises like this were only the beginning of a longer road in terms of a public conversation about food. Participants said they needed more conversation and greater awareness to

begin to think about how what we do as individuals and as a society interlink with global food economics, systems and processes.



“Everything we said earlier, it was only from our point of view. None of us were thinking about carbon footprint or anything like that... Maybe it comes down to educating us about what’s actually involved in the food we want to be put on our table.”

(Female, Edinburgh, Wave 1)



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“We asked people to brainstorm the biggest changes that people from a generation ago (or about 20-30 years) would notice about our world today.”

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## 5.0 PUBLIC PERSPECTIVES ON ‘OUR FOOD PRESENT’

Overall, this section discusses participants’ views of ‘Our Food Present’ – the characteristics which participants felt define our current attitudes, experiences and

values around food in the UK. Insight from this section is drawn from data across all research elements.<sup>20</sup>

### Key findings

The following themes emerged as participants considered the current UK population’s experiences and values in relation to food:

- A call for balance between convenience versus connection as key drivers for how we engage with food;
- Perceived tension between the health and quality levels of food versus the price we pay for it;
- A desire for education, information and empowerment around the food we eat; and
- Concerns about who holds the power which shapes the world we live in, and who people trust to keep people’s best interests in mind.

Discussions touching on the complexity of global food networks, or the production practices that bring food to UK consumers’ plates, were almost wholly new to participants when thinking about the current food system. Very few had considered the interdependencies between the countries or actors within the system, pressures on the availability of food, or the link between climate change and agriculture.

### 5.1 People’s experience of ‘Our Food Present’ – key themes

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As a way to prompt reflection on our current practices and challenges in relation to food, in Wave 1 of the deliberative workshops we asked people to brainstorm the biggest changes that people from a generation ago (or about 20-30 years) would notice about our world today. Prior to introducing any prompts, statistics or perspectives on the world we live in, participants shared thoughts and views, challenged and debated each other, and shared their own experiences.

Below we outline the key themes that emerged<sup>21</sup> when participants described UK citizens’ attitudes, experiences and values in relation to food in the present day. Where there were obvious differences in attitudes between people, these have been identified; where there were generally consistencies across the sample we present this as a combined public ‘voice’ accordingly.

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20. Including the online survey; online qualitative research; and Waves 1 and 2 of the deliberative workshops.

21. From across the deliberative sessions, as well as in the online qualitative forums.



## Convenience versus connection

Participants widely agreed that 'Our Food Present' offers a startling degree of **convenience** to the modern shopper – that both complements and influences how people shop for, prepare and consume food. For example, participants generally felt that today's consumer experience is in large part defined by:

- Increasing dependence on 'instant' or 'quick' foods – everything from microwave meals, pot noodles and take-aways to 'cook your own' ready-meals and 'posh fast food' outlets;
- The rise of online grocery shopping and other digital food ordering options that make it easier and faster to get food to your table when you need and want it, with reduced effort and time spend;
- An increase in 'eating out' and 'on the go' eating – with people consuming more restaurant meals, take-away meals and drinks, and convenience snacks and treats;
- Increased availability and variety of food – both in terms of 1) expanded retail and food business opening hours and 2) an ever-present variety of produce and packaged foods from around the globe, in every season – all year round;
- For some, an almost overwhelming amount of choice in terms of what to eat, in part enabled by the range of processed



“Our weekly food is not as boring as it was in the past, when you had mince and tatties on the same day every week.”

(Male, Edinburgh, Wave 1)

“I think more people will be concentrating on their careers, rather than staying home making food for their family. They want to be out working, earning money, rather than staying in and spend 2 or 3 hours at home cooking a meal.”

(Male, Cardiff, Wave 1)

“I’ve grown up with chickens and that real experience of the produce gives you real affinity with the product... whereas these days, children don’t have a clue.”

(Male, Cardiff, Wave 1)

# THE VALUE OF FOOD?

The significance of the family meal?



The amount of food we throw away?

“There is no more Sunday lunch and special family sharing. People now plan meals less.”

(Male, London, Wave 1)

- and packaged foods at relatively affordable prices.

Participants felt that this increased convenience of food was part and parcel with **modern lifestyles** which demand us to do more and at greater speed – that as a society, we have all become busier and with less time to focus on day-to-day food preparation and consumption. In many ways, they thus felt that the rise in convenience and ‘faster’ foods is a benefit.

For example, participants noted that convenience helps ensure people can fuel themselves during busy times, enables two-parent working homes (and the equalities advantages associated with this shift). It also helps ensure that people don’t have to spend as much of their non-work time shopping for and preparing food.

Some participants even noted that they didn’t feel that their current lifestyles would be sustainable without these evolutions in convenience.

*“[The food we have today is] convenient, quick, and good for those living or eating on their own.”*

(Female, Edinburgh, Wave 1)

For example, some parents wondered if they would have to make sacrifices in terms of their work/home balance if they needed to



.....

dedicate more time to meal planning and preparation. Some younger participants characterised themselves as highly dependent on this environment of convenience and availability, wondering if they would even ‘know where to begin’ if they needed to plan more in advance or cook more ‘from scratch’.

*“I wouldn’t know where to begin if I had to cook it all from scratch... I’d probably starve...!”*

(Male, London, Wave 1)

However, at the same time that people in this research heralded the benefits of convenience, they also raised concerns that some of the habits and behaviours it enables come at a cost.

People had a strong sense that as a society, a focus on pace and convenience has meant that we have sacrificed some elements of personal and social **connection** with and through food. This was in relation to what we eat and how we eat it, but also in terms of how deliberate our choices are. People raised concerns that we know less than we should about how the food we eat is produced, and about how connected we are to that process of production.

*“There is no more Sunday lunch and special family sharing. People now plan meals less”*  
(Male, Belfast, Wave 1)

For example, there was discussion about perceived loss in terms of home cooking as a common focal point for inter-generational education, connection, and sharing of time. In several workshops, people bemoaned the

perceived ‘loss of the Sunday dinner’. People reported a sense that families and friends are less likely to put aside the time to ‘make something special’ and gather together to share it than they used to. There was a sense that investing your own time and energy into food – particularly foods which are repeated, ritualistically, over time – is part of what makes them ‘special.’ Participants had strong emotive connections to recipes and meals that they had eaten as children, that helped them feel embedded and part of their families or cultural communities.

*“I think if you asked someone in twenty years’ time what traditional British food was they probably wouldn’t be able to answer you”*

(Female, Cardiff, Wave 1)

They were concerned that if we cook less and share less home-cooked food together, there is a risk that a key point of cultural sharing between generations via these ‘special’ meals together could be lost. They were also concerned about potential loss in terms of time spent talking, laughing and sharing that food together – although some did note that perhaps social time is changing location (e.g., from the home kitchen to the coffee shop) rather than disappearing.

Likewise, people noted that today’s consumers also seem increasingly disconnected from the **processes and practices** which help deliver food to their tables. There were often very nostalgic discussions about ‘the old ways’, where people relied less on the food industry and large retailers for their food shopping, and

more on local supply chains or even self-produced produce and meats.

There was a sense that at this moment in the process of global industrialisation, the modern UK citizen has little sense of where our food comes from; how food is produced and the systems which underpin that; or who is making decisions about our food. For example, participants noted that it is now rare for them to have any kind of real relationship with local suppliers or producers.

**“If you’re buying strawberries seasonally they will taste better... whereas if you’re buying them in from Spain in December – what are they going to taste of?”**

(Female, Belfast, Wave 1)

People recognised that they may be viewing the past with rose-tinted glasses; a generation ago, the processes of industrialisation and fragmentation of the food production, purchase and distribution process was already well underway. And yet, participants worried: Will we go too far? Will we lose a way of relating to food that we enjoy, and part of how we relate to each other as people?

One particular trend that was concerning to participants across research was a perceived increase in **food waste**. For example, participants noted that they themselves were guilty of throwing food

“1000s of tonnes of fish dragged out in one go...if it's the wrong fish, it doesn't get used... It's terrible.”

(Male, Cardiff, Wave 1)

“Even if I only wanted three tomatoes I could go in and ask for them. In a supermarket you have to have a whole packet”

(Female, London, Wave 1)

away at the end of the week, particularly things like produce and packaged salads, which were purchased but never actually consumed. There was also some engagement with social conversations around wastage by retailers – for example, via the disposal of ‘ugly foods’.

Waste of food was seen as, in large part, a logical outcome of increased food availability and decreased ‘specialness’ and value of food. Participants thought it was wrong for edible food to be thrown away when there are individuals going hungry both within the UK and in other nations.



### Health and quality versus price

When thinking about the world we live in now, two other key issues consistently emerged in participants’ discussions: 1) whether the food that we tend to eat is as healthy and as high ‘quality’ as it once was, and 2) whether and how our food budgets dictate our decisions around the food we eat. As we will explore, participants tended to see these issues as inextricably linked.

In each of the four geographical areas included in this research, there was spontaneous discussion around whether we now eat as ‘healthily’ as we used to – and whether the food we eat is of the same ‘quality’ as it once was.

‘Quality’ for participants was often linked to a sense of ‘naturalness’ and ‘freshness’ – with ‘whole foods’ such as produce, meats

and poultry considered of higher quality than packaged and processed foods.

Underlying this notion was concern about the long-term health consequences of consumption of more processed foods, which were perceived to be sold at cheaper price points and thus readily available to consumers on a budget.

For example, participants raised anxieties around the potential long term impact of consumption of additives or E numbers, and around the higher levels of sugar, fat and salt that processed foods generally contain.

They wondered if rising levels of obesity and nutrition-related illnesses were in part driven by increased consumption of processed and ‘less nutritious’ foods, and if the types of foods we eat, as well as the volume, might be impacting our wellbeing and health.

“When I was growing up cakes and biscuits were treats... [now] people eat more, the portions are bigger.”

(Female, Belfast, Wave 1)

Some participants also framed their discussion of food ‘quality’ in terms of its taste – which divided opinion according to individual preferences and values. Some participants were perfectly happy to consume convenience foods as long as they tasted good and were satisfying – with taste

taking priority over the health considerations outlined above.

Others felt there was a qualitative difference between convenience foods which might be immediately satisfying, but didn’t taste healthy and nourishing, and whole foods which are produced ‘naturally’.

However, they questioned whether the produce and meats available in modern supermarkets taste the same as they used to. Some raised concerns that modern processing methods meant that even ‘whole foods’ may not be as ‘healthy and quality’ as they used to. However, few were able to articulate exactly how and whether processing methods had changed.

“I used to eat loads of fruit, but now because it's so tasteless, I don't really enjoy it. And because convenience food is cheaper than cooking home foods, it does encourage you in that way”

(Female, Cardiff, Wave 1)

Twinned with these concerns about the health impacts of modern food – and particularly convenience foods – were anxieties about how food budgets impact the kinds of foods we choose to eat.

Across all areas included in this research, participants raised concerns that we are increasingly seeing a ‘social divide’ in relation to food. That is, there were concerns



that people who are more financially pressured tend to eat more processed and convenience foods, and people with more financial freedom tend to eat more 'whole' foods with presumed higher nutritional value. Participants worried that whether you can buy the foods that are most conducive to health might be a matter of what you can afford – that increasingly you need to be in a higher income bracket to afford to 'eat well'.<sup>22</sup>

These concerns were also compounded by a perception that fast-paced modern lifestyles meant that some individuals were too busy to cook and eat healthier, less processed foods. For example, some people felt that organic produce which was exempted from some of this 'modern processing' was healthier and tastier, but that you paid for the privilege.

**“People feel pressured and overwhelmed, which leads to silly choices around food and in supermarkets. The people who eat convenience foods are those under more financial and time pressure.”**

(Female, London, W1)

However, this view was also sometimes challenged during discussions. For example, participants and moderators asked whether it might be possible to eat more whole foods

**“[The food industry] are the ones that made it available to us in the first place. We can't buy it if it's not there. So they entice us with it and we want it more... I think we're controlled more by corporations... we haven't got as much power as we think.”**

(Female, Cardiff, Wave 1)

on a budget, but that people might just not choose to do so.

When challenged in this way, participants generally acquiesced that eating healthily on a budget was not impossible, but it was challenging. To orient your food spend in this way required conscious deliberation and more time investment in terms of planning and preparing food.



### Education, Information and Transparency

One of the areas where participants were most positive about 'Our Food Present' was in relation to the amount of information and education available for the modern consumer about the food we eat. This conversation centred on two distinct but related issues.

First, participants felt that there was much higher **consumer awareness and engagement** with food and nutrition than there had been in the past. They noted that



as a society we have more information available to us in terms of cooking education – e.g. in terms of the rise of the 'celebrity chef' and range of popular media dedicated to cooking, and in terms of the ever-present availability of advice, information and recipes available online.

Participants also generally felt that modern consumers were more aware of and engaged with information related to health and nutrition than they had been in the past.

For example, they noted the rise of media coverage on issues like the health impact of consumption of sugar, fat and salt; increasing awareness of and public conversation about organic options; and the rise of 'special diets' or nutritional choices (e.g. gluten free; vegetarian; dairy-free; and so on). People also positively noted that

**“I think generally things are regulated well... I've never had food poisoning from contamination!”**

(Male, Belfast, Wave 1)

**“Even going into the supermarket to buy a tomato sauce, you need a degree!”**

(Female, London, W1)

22. Recent evidence supports the notion that healthier foods are becoming more expensive. Jones et al. (2014) recently found that since 2002, healthy foods and beverages in the UK have been consistently more expensive than unhealthy ones – and the gap is widening. <http://journals.plos.org/plosone/article?id=10.1371/journal.pone.0109343>

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“If [the Government] loses unhealthy products [fizzy drinks, unhealthy foods] they lose the tax on that revenue. So where do they replace that money they’ve lost to keep up the economy? It’s not there.”

(Male, Edinburgh, Wave 1)

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“Consumers have so little power – whoever has the money is in control, really.”

(Female, Cardiff, Wave 1)

schools had begun to prioritise food and nutrition education for our young people. They were pleased that ‘healthy eating’ messaging was becoming firmly embedded in the nation’s youth.

Second, participants appreciatively noted the **increase in labelling information** about food ingredients, nutritional value, and some aspects of food processing. They praised recent initiatives like the ‘traffic light’ labelling (for fat, saturated fat, sugars and salt) and increased clarity of allergen labelling for helping enable better consumer choices and increasing clarity.

Participants valued the information that these types of labels provided in so far as it allowed them to gain a clearer understanding both of the contents of their food and what was safe for them to consume. For some people the mere presence of labels and information was found to be reassuring, due to the implicit suggestion of regulatory oversight.

However, at the same time that participants praised this perceived increase in information about food, they also

questioned whether consumers always have the **education** they need to make smart choices and to eat well. For example, participants worried that as a society we are less skilled in home cooking than we once were. They raised that having information available – about nutrition, or about how to cook – wasn’t the same as knowing how to make choices confidently.



### Power, trust and empowerment

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Overall, participants felt that **the food industry and market forces** were the dominant force in terms of shaping ‘Our Food Present’ and how we plan for, purchase, eat and share food in the modern age. However, many participants were also highly suspicious of transnational corporations.

They assumed that the profit motive and shareholder needs would generally trump considerations around consumer health or wellbeing.<sup>23</sup> There was slightly more trust of smaller producers, as participants assumed that they would have relatively closer relationships with consumers, and would be more likely to sell fresh, local produce.

Conversations around the role of the food industry in shaping the world we live in were complex and varied. However, participants

assumed a strong role for big businesses in shaping both individual consumer experiences and more complex consumption trends. For example, some participants recognised the role of food marketing and retailing in their own purchasing decisions – feeling that they were susceptible to buying more than they needed, or buying less healthy options in response to offers and promotions.

Participants were less aware of and engaged with the role of **Government** in relation to the food they ate; there was a general sense that the visibility of what is done on the public’s behalf is fairly low.<sup>24</sup> Awareness was highest in relation to the role of these bodies in terms of working with industry to ensure that the food we eat is safe and hygienic. Some participants raised distinct initiatives like the Food Hygiene Rating Scheme, or discussed UK tests and controls on food coming into the country from other areas. Even those unsure of the specific actions that were taken on behalf typically felt that ‘someone’ was protecting the public’s interests in this way – in large part because their personal experience had been of a safe food environment.

Some also had awareness that the Government was responsible for supporting improvements in labelling clarity and transparency. Again, any increase in

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23. This finding is in line with the findings of the Which? and GO Science report – where participants mistrusted manufacturers and retailed to be transparent about food production practices, and felt strongly that the drive for profit was greater than the desire to provide healthy foods at affordable prices. Which? and Government Office for Science (2015). Food System Challenges: Public Dialogue on food system challenges and possible solutions; and in FSA and TNS BMRB (2014).

24. This reflects the findings of previous work conducted for the Food Standards Agency by TNS BMRB, including Balance of Risk and Responsibility (2014); Perceptions of Chemicals (2015). In both pieces of research, participants expressed similar assumptions that ‘someone’ was likely to be responsible for regulating food and ensuring consumer safety, even if they lacked specific knowledge about who this was.

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**“I thought we’d be in a better place in the future – I didn’t expect that amount of people to still go hungry.”**

(Female, Cardiff, Wave 2)

information was welcomed, as participants felt they had a right to information – even if it was the right to ignore that information when actually choosing food to eat. They wanted to know that as and when they needed information to inform their decision making, it would be available to them.

More transparent detail around what was in the food they eat helped people feel that ‘someone’ was looking after their interests. It helped them feel more confident that there was a check and balance system in relation to how industry engaged with the public.

However, overall participants were unsure about exactly how much was being done beyond supporting information provision to protect the public’s wider interests – and how much realistically could be done.

There was a hope that Government intervened or worked within industry to counteract some of the negative trends they saw as shaping our relationships with food. For example, some participants wondered if Government might help to work with industry to shape the nation’s diet, for example by discouraging marketing of unhealthy foods.

At the opposite end of the spectrum, the most cynical participants wondered if Government really ‘intervened’ at all; some

individuals for example expected that the sale of unhealthy foods generated tax revenue for the Government, and that the Government would therefore be reluctant to take action against retailers selling these products.

**“I’m not so sure that they really work separately – is Government just in cahoots with big business?”**

(Male, London, Wave 1)

Regarding the role of the public in shaping Our Food Present, there was a mix of opinion depending on participant context. Some participants raised that our purchasing and consumption patterns help to shape the world we live in, and had more faith in public empowerment as a driver of change.

For example, some participants made reference to specific boycotts of products that they were aware of, or noted more hypothetically that if people stopped buying particular products, it would not be possible for food businesses to continue stocking them. Overall, those with more faith in consumer action tended to be participants from higher socioeconomic groups – and particularly those who were already more engaged with the idea of food as a political issue. For example, these participants referenced previous consumer political action and campaigning efforts to influence food markets:

*“People can stop buying produce and make a difference – recently in relation to Israeli goods, people stopped buying produce because they believed human rights in the country weren’t as they should be.”*

(Female, Belfast, Wave 1)

Others felt that the public lack the power to be real change drivers, because they believed that 1) people are more likely to default to the ‘easy’ option rather than take action as a result of conscious deliberation, or 2) because coordinated effort at a level that would actually influence the market is rare and hard to achieve. There was also a general sense that people are ultimately constrained by the choices that are made available to them by food retailers and Government; that real power lay in the hands of those who were providing the range of choices to consumers. Regardless, participants widely wished that the public had more power – given that they were perceived as most likely to have their own best interests at heart.

## 5.2 Confronting complexity and global challenges

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Overall, participants were not very aware of and did not spontaneously consider the global food systems and production practices which bring food to UK citizens’ plates. That is, they were not in the habit of thinking about global interdependencies which allow us the degree of choice and availability that we have become accustomed to.

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**“[I feel] more confused now, I feel this dilemma between what I would like to see in Britain and things that are geographically a long way away. Changes in this country will affect people elsewhere.”**

(London, Follow-up interviews)

**“It’s all driven by profit. It shouldn’t be driven by profit; it should be driven by the impact on people.”**

(Male, Belfast, Wave 1)



“That’s why organisations like [the FSA] are extremely essential...there needs to be single initiatives that have control.”

(Male, Belfast, Wave 1)

“The most important thing is information and being able to make choices. ... I want to have food from all the different sources.”

(Female, London, Wave 2)

For example, many had relatively unexamined assumptions that food sold in the UK was largely grown, processed and packaged there too. Likewise, participants tended not to be aware of the complexity of the global process which brought ‘simple’ foods like bread or a chocolate bar to their table. They had not considered issues like importation and the risks involved around global dependencies in the supply chain – or potential impacts on the rest of the world of our consumption patterns here in the UK.

As part of the deliberative process, participants were presented with a wide variety of stimuli and perspectives on the global challenges facing the food system – with impacts beyond the individual experience of people in the UK.<sup>25</sup> Though some individuals expressed strong initial scepticism, the typical response was one of surprise and concern and, in the face of the scale and inevitability of the problem, a desire for people to know more about such important issues.<sup>26</sup>



25. For example: via the online survey questions; during the online qualitative forum research; or during Wave 1 of the deliberative dialogues. Details of the statistics, perspectives, case studies and other stimuli used to support conversations around global challenges are contained in the Appendices.

26. This more sceptical group reflects more generally the responses observed in the Which? and GO Science dialogues, where participants were initially sceptical about whether the challenges and changes to the food system would affect the UK, in reality. Which? and Government Office for Science (2015). Food System Challenges: Public Dialogue on food system challenges and possible solutions. <http://www.sciencewise-erc.org.uk/cms/assets/uploads/Which-GOS-Food-Report-FINAL6.pdf>

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*"I've never really thought about any of this before, to be honest. All of this. I've never had to think about it. So now I'm thinking God I can't believe it takes all of these steps!"*

(Female, Edinburgh, Wave 1)

This section outlines four key moments where participants' views and frames of reference began to shift significantly in response to information. We also highlight the issues that stood out most to participants between workshops; the facts and perspectives that were most powerful in making them reflect on their own practices and role in the food system, and which changed their views about where the food system might be headed.<sup>27</sup>

### Population increases and the pressures on availability

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In the dialogues, **the impact of population growth** on the global availability of food was mentioned spontaneously by only a handful of participants, despite the relatively high incidence observed in the survey. However, once population projections and other information about future scarcity were presented, participants quickly began to question their previous assumptions around continuing abundance and choice.

Food scarcity as a result of changing consumption patterns in developing nations caused participants to start thinking in terms of 'us' and 'them' – for some in terms

of fairness, i.e. 'we shouldn't try and stop them having what we have'. In others, the topic sparked wariness that developing demand abroad could threaten food supply for future generations in the UK.

*"It's all about resource, and if you have more people on the planet, you need more resources... There's going to be uncertainty because we need food and water to survive."*

(Male, Edinburgh, Wave 2)

### The link between climate change and food production

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Though participants were familiar with the impacts of transport and heavy industry on climate change, they had not previously made connections between CO<sub>2</sub> emissions and food production and agriculture. A small number of climate change 'sceptics' tended to dismiss some of the information and, as a result, feel less concerned about challenges overall. However, participants generally felt their 'eyes had been opened'. They were particularly concerned in relation to information about the vulnerability of global agriculture (and consequently food supply) to environmental conditions.

*"Earlier we were talking about technology and opportunities. But instead, it seems the experts are focused on the climate and what is actually going to be available. We weren't really thinking about that."*

(Female, Edinburgh, Wave 1)

### The length and complexity of the farm to fork process

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This concept was central to shifting participant views and challenging their assumptions about the food system. Participants were commonly startled by how little they knew about the complex journey involved in getting food on their table. As they became more familiar with the stages involved, participants quickly began to think of risks inherent in complex food systems, specifically around the increased possibility of things going wrong, difficulties enforcing safety and quality standards, and the negative impact on the environment.

Simplification of the food chain was identified as a key opportunity. For some, the complexity within the food system prompted them to feel that the role for individual people was limited. Higher-level intervention and oversight was deemed necessary to help individuals to navigate this system.

*"If they knew how much hard work went into it [food production], people wouldn't be so wasteful."*

(Female, Cardiff, Wave 1)

Discussions quickly became reflective as participants attempted to connect understanding of global and structural complexity with their own experience. As participants considered the **scale of inputs and processes** required to produce food, some began to question their previous

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*"We've become complacent. We're so used to everything being there and being readily available when you want it that you really don't need to think... You just go and get it."*

(Female, Edinburgh, Wave 2)

*"I can't believe how vast an [amount of resources] just to make a chocolate bar!"*

(Female, Belfast, Wave 1)

27. This section draws on findings from both waves of the deliberative workshops.



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“For example, some participants raised that they would be unwilling to purchase ‘ugly vegetables’ if retailers sold these in an effort to reduce waste. They indicated that, used to purchasing produce which looked ‘fresh’ and appealing, change might make them worry that ‘ugly’ food was somehow lower quality.”

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expectations. In particular, discussions emerged around whether 1) making food as cheap as possible is always right; 2) foods should be available all year round if people desire it; and 3) current consumption patterns are sustainable, without far-reaching impacts.

*“The vastness of the process worldwide... all the ingredients coming from all over the place and all the processes involved, yet we want things to be as cheap as possible.”*  
(Female, Belfast, Wave 1)

For example, in response to information about how much food and water was required to raise the cattle that we eat, people questioned whether current meat consumption patterns are sustainable or ethical. Different positions emerged here in relation to how much importance was placed on consumer choice. Younger participants typically felt that the preservation of choice and access to variety was something they were uncomfortable with giving up.

However, older participants often expressed the view that people should be willing to make sacrifices around choice. Views also varied according to the inherent value that participants placed on convenience and availability in their lives. Some participants who were more dependent on these characteristics were less willing to consider altering their consumption patterns.

Learning more about the scale of resources required to produce food also galvanised

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“I’m not sure it’s really my job to think about that, to be honest. It’s too complex. Surely things sort themselves out.”

(Male, London, Wave 1)

participants’ condemnation of food waste. After the first wave of workshops, some participants in each of the workshop locations explained that they had become more aware of their own individual waste, and had changed their behaviour as a result – by buying less food and using leftovers that would have otherwise been thrown away.

As discussions progressed, participants began to place responsibility for waste on industry as much as, if not more than, the consumer. For example, some felt strongly that supermarkets ought to respond to their willingness to buy food that would otherwise be thrown away. Others said that the food industry should be looking to simplify supply chains and production processes so that there was less opportunity for wastage overall. However, calls for change were always tempered with scepticism from people who did not want to be impacted or have to change their own personal behaviour.

For example, some participants raised that they would be unwilling to purchase ‘ugly vegetables’ if retailers sold these in an effort to reduce waste. They indicated that, used to purchasing produce which looked ‘fresh’ and appealing, change might make them

worry that ‘ugly’ food was somehow lower quality.

### Power of food businesses

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As outlined previously, participants varied in terms of their spontaneous views about the role of the food industry in shaping the world we live in. There was also a great deal of uncertainty about how they felt Government supported or provided ‘checks and balances’ against these bodies.

*“They make as much money as they possibly can even if it’s bad for consumers – so that’s where someone has to step in and say ‘this isn’t about money any more!’”*

(Female, Edinburgh, Wave 2)

Considering global supply chains and processes shifted people’s perspectives, as they understood the true scope of power of the most influential of global corporate bodies. Whilst participants were generally familiar with the dominance of the ‘big 4’ supermarkets in the UK, this idea that there were monopolies elsewhere in the global food system was eye-opening for many. In response to thinking about the role of the food industry in shaping global food trends, groups often became more concerned.

The same lack of trust they often had about corporate power in terms of shaping UK consumption patterns was amplified when thinking about global impact.

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“There are two extremes. If you look at Zimbabwe which has hyper-inflation and we’re sitting in the UK with negative inflation. How does that work? We are still buying stuff in as cheaply as possible and they’re the ones suffering.”

(Male, Belfast, Wave 1)

### Global distribution and inequality

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Overall, participants had difficulty thinking about the impact of global food chains on the lives, livelihoods and ‘Food Futures’ of citizens in other countries.

Their focus when considering global complexity was on potential implications for UK citizens, or on more general global issues like inefficient production processes or environmental degradation. Some participants were quite worried about the potential for the way we eat to have equality impacts elsewhere on the globe.

Others felt this was beyond their responsibility, and that it was up to individual governments to be accountable to their own citizens.<sup>28</sup>

*“I’m not sure it’s really my job to think about that, to be honest. It’s too complex. Surely things sort themselves out.”*

(Male, London, Wave 1)



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28. This stands in slight contrast to the Global Food Security (GFS) research into food security conducted by TNS BMRB, where participants were very concerned with fairness and global distribution, who benefits, and how their actions as consumers impact global supply chains. TNS BMRB and Global Food Security (2012). Global Food Security Programme – Exploring public views.

# 6.0 WHERE ARE WE GOING?

This section explores participants' expectations, aspirations and concerns for the future of food. It begins with the vision of the future participants spontaneously constructed via personal reflection and discussion. We then outline where participants thought our future is headed, and what underpinned these predictions.

## Key findings

Unprompted expectations about Our Food Future were markedly similar across the wide range of participants included in research. People expected current trends to continue and become more extreme: with convenience becoming increasingly important; processed food becoming the norm for the majority of the population and concerns that healthy food could become a luxury; transnational corporations and retailers growing more powerful; with hopes that people would be more educated about food and nutrition.

More deliberated responses in the workshops uncovered the following principles, important for protecting the future of food:

- **Desire to retain food knowledge** and generational transmission of skills
- **Choice and agency:** no one should be forced to eat only processed or modified/functional foods – everyone should have access to an affordable, 'natural', healthy option
- **Food innovations** should be designed to supplement and enhance quality of life (e.g. to fight disease), rather than be a substitute for basic nutrition
- **Increased information provision** about food systems and processes is desired – to help raise awareness and engagement with global issues
- **Shift from corporate power to government control:** As a future dominated by local suppliers appeared unrealistic, participants wanted government to have more power over the food industry

## 6.1 How views developed during research

Participants' immediate, spontaneous visions of the future were typically driven by an expectation that perceived current trends were likely to continue. As before, their initial discussions and expectations about Our Food Future also centred around what we might expect this to look like from a UK citizen perspective; that is, what the future might look and feel like to them, their families and communities.

Though there were small differences between groups in terms of whether certain trends were anticipated to get better or worse, and the extent to which global challenges formed part of these initial conversations, there was a remarkable degree of homogeneity in participants' initial expectations for the future.<sup>29</sup> This shared future vision is presented on the next page, against the four key themes.

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The deliberative discussion approach used for this work allowed us to challenge participants' initial assumptions and responses – and to see how views changed and developed over time.

To aid this reflection, we worked with participants through four very different future 'scenarios', and participants debated and discussed implications for them as individuals and for the global food context more widely.

Each scenario raised different challenges and personal experiences around things like 1) health, 2) food authenticity, 3) food systems and production methods, and 3) food innovations (e.g. 'nutraceuticals' or traceable food technologies).

This use of scenarios was extremely useful in helping participants reflect on and challenge some of their initial assumptions about what the future could and should look like. Below, we explore participant views – both spontaneous and more reflective – against each of the four key themes.

## 6.2 Public view – key themes

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### Convenience versus connection

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People in this research almost universally expected that the current drive for convenience would continue to influence how and what people ate in the future – both because people will continue to demand this, and because the market will cater for their demand.

Participants' ambivalence about the potential impact of this drive for convenience, as discussed previously, became even more pronounced when they imagined what this might mean for our future.

Discussions surfaced some optimism but also real concerns and anxieties about how we might relate to food in the future – with variation in opinions depending on how much people currently valued and relied on convenience in their current relationships with food.

On one hand, there was a hopeful expectation that the choice and variety people had enjoyed in the UK in recent decades would continue, with all of the benefits to ease, comfort and efficiency implied. Some said that they enjoyed variety – and expected that they would continue to see new, exciting food options arriving on UK shelves in years to come. Some participants also hoped for a maturation of the convenience market; that is, that the market may shift to provide more high-quality and sophisticated quick-to-prepare foods – for example, 'healthier' ready-meals. People also welcomed potential advances in digital services which would help them spend less time and effort on shopping and meal planning.

For example, in London participants discussed prototype fridges which would monitor what foods you were running out of and order more, without any need for monitoring or intentional purchase. At the more extreme end of the convenience scale,

some participants even spontaneously suggested that meals might begin to take pill-form, a form of quick and fuss-free nutrition. All of these advances posed the welcome promise – for those that wanted or needed it – of a further reduction in the time, effort and planning required to feed themselves and their families. For others, it was not necessarily a positive potential future – but one they expected would be required to match busy lifestyles.

*"In the future we won't have any time to cook anything. It could go the way of pills, potions and vitamins."*

(Male, Cardiff, Wave 1)

However, across the participant groups, conversations about the influence of convenience in shaping Our Food Future was intertwined with fear, anxiety and some sadness. For example, many participants raised concerns that younger generations growing up in an 'age of convenience' would lack 1) basic knowledge in cooking and preparing foods using 'traditional' methods, and 2) understanding of the production processes, supply chains and practices that helped food arrive at their tables. This also raised related concerns about the loss of the social aspect of food – some participants worried about a move away from the traditional 'family dinner', fearing the loss of opportunities for family bonding and for children to develop a deeper connection with food.

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**“In the community I was brought up in, if a family was struggling we'd get a bag of stuff and give them that – everyone rallied round. There's a lack of that nowadays.”**  
(Male, Edinburgh, Wave 2)



“We know the population growth is going to be massive and we’re going to have to find ways to feed people. We’ll have to accept that some people will have to eat burgers grown in labs. If you want protein, if you want meat, we’ll have to accept that is the way it is.”

(Male, Belfast, Wave 1)

*“Today’s kids want to buy any unhealthy food. It’s there by the checkouts and kids demand it from parents. ... Skills and knowledge about food could be lost.”*

(Female, Cardiff, Wave 1)

Participants also expressed concern that a continued trend towards convenience may result in a rise in the amount of processed foods being consumed – with linked concerns about the long-term health impacts of eating ‘less wholesome’ foods. This raised questions for participants about potential impacts on public health, particularly in relation to diet-related illness such as diabetes and cardiovascular diseases.

Some participants worried that consumption of more processed foods may also mean continued rises in packaging waste, with potential detrimental effect on the environment – for example, if single-serving meals were to become the norm.

*“We let [producers] put things in that make it last longer, but it’s not good for you so we’re going around in circles on that one.”*

(Female, Edinburgh, Wave 1)

Two of the scenarios used in this research helped participants reflect on whether they would actually be willing to sacrifice convenience in search of more connected relationships with food.

In one, participants imagined what it would be like to live in a future where we had returned to more localised food production practices – where individuals or local

producers grow and sell much of their own food, and have a closer connection to the food system.

In another, food had come to play a much more functional role for the majority of UK society, and people know little about where their food came from or what is in it.

Although the first scenario embodied many past food practices and values participants had previously expressed nostalgia for, few said that they would actually be willing to sacrifice the lifestyles they had become accustomed to in order to achieve it.

For example, thinking about sacrificing more complex and global food production raised concerns about limited availability of food, the potential insecurity of the food supply, and a likely loss of technical sophistication and innovation in UK agriculture.

Participants also worried about the social impact of having to spend more time and energy on food production and preparation.

Thinking about this future helped participants realise that whatever their concerns about convenience, they valued its benefits and did not want to ‘take a step backwards’ to simpler production times.

*“Growing your own must be so time-consuming. What about lower income families? Will they have the time to grow their own food and veg? What about the elderly and disabled?”*

(Male, London, Wave 1)

On the other hand, a second scenario which presented an almost total disconnect between food and the individuals who consumer it was, for many, a nightmare imagining of the future.

Though there were a few participants, for whom food was already largely ‘a function’, who expressed little regret at this breakdown, participants on the whole viewed it as unacceptable. Participants were clear that there was a careful balance to be struck, and that different people would occupy different places on the spectrum, depending on what was personally important to them.

The key principle that emerged was that **people could have a choice** about the degree of connection they had to food – and that individuals would not be forced into this position through a lack of knowledge or finances.



## Health and quality versus price

Concerns about the convenience impulse as a driver of future change linked closely to concerns about the health and quality of the food we will eat – and what kinds of foods will be affordable and accessible in Our Food Future.

As noted in Section 7.0, participants perceived socio-economic differences in Our Food Present around the kinds of foods that people eat, and the perceived nutritional value of people’s diets. Looking forward, there was spontaneous consensus that this trend may continue.



Participants worried that Our Food Future may be one in which food was a marker of a **'two-tier society'**: where healthy and less processed foods are increasingly a luxury, and people who are more financially pressured relying more on convenience foods. Given beliefs that processed foods were less likely to be nutritious and health-

**“It’s the fear of the unknown, not knowing what’s going into it. That’s a worry. We want to be able to know in the future. We don’t want to end up in the future where you don’t know [what is in your food] and you’re just taking things to stay alive.”**

(Male, Belfast, Wave 2)

affirming, participants thus worried about obesity and diet-related illnesses becoming more common in groups with less money and time to spend on food.

*“I think things are going to go in two directions, there’s going to be a split. Some people will always be able to eat healthy food – but there are other working families where that’s not going to be an option. There’ll be a big gap between families.”*

(Female, Cardiff, Wave 2)

This common fear was not necessarily based on an expectation that food will become more expensive in the future. Few participants felt able to comment on what might happen to food **prices** in the future, viewing this as a somewhat inscrutable picture of complex market forces. Participants were able to imagine both a proliferation of cheap, processed foods, and sharp rises in prices due to shifts in the global economy or in response to shortages. The expected separation between the ‘haves’ and ‘have nots’ was driven in part by the expected proliferation of cheap, processed foods available,

meaning the price gap between healthy and unhealthy foods would become wider.

**“Why should we have to pay more for good quality food? ... Some people who want to eat healthily just won’t be able to afford it.”**

(Male, Belfast, Wave 1)

Despite some of these concerns, participants were also hopeful about how society might respond to these trends. As they perceived current knowledge and awareness about the importance of nutrition on the increase in the UK, they hoped the public and Government alike would be focussed on securing a balanced diet in the future.

This was viewed both in terms of individual choices – with people seeking healthier options, and Government interventions – in the form of regulation, subsidies, and educational campaigns.

*“The Government needs to start taxing companies that use sugar and e-numbers... If they do nothing else I’d like them to do that. Make it harder to be unhealthy.”*

(Female, London, Wave 2)

During the second waves of workshops, participants also explored potential innovation space that could alter the future of food via the introduction of

**“We’re already using this type of thing – I’m on cholesterol-lowering tablets and eat a certain type of margarine that reduces cholesterol, and I eat yoghurts with good bacteria.”**

(Female, Cardiff, Wave 2)



30. Nutraceuticals are foods which include health and nutritional benefits – some of these are ‘naturally’ present (e.g. probiotic yoghurts) while others have been added by producers (e.g. margarine that has been modified to reduce cholesterol). The stimulus materials used to introduce nutraceuticals are shown in the Appendices.

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“You’re losing the identify of food, it just becomes colour...it’s like having porridge and putting green food dye in it so it’s green coloured.”  
(Male, Cardiff, Wave 2)

“Generally speaking if you’re having to vitamin enhance something it’s because there’s something wrong with it. Maybe it’s been processed so much that you’re having to put the good stuff back in again.”  
(Male, Belfast, Wave 2)

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‘nutraceuticals’ or ‘functional foods.’<sup>30</sup>  
This was a topic that participants were highly engaged by.

Participants recognised a need for food options that were both healthy and convenient, and felt that nutraceuticals could help busy people maintain a nutrient-rich diet. Some participants were supportive of the idea that they could ‘get their five a day’ with minimal effort, giving the example of parents using nutraceuticals to help with feeding their children in a healthy way.

They were also generally positive about the potential for medical benefits delivered through nutraceuticals, seeing this as an effective way to tackle public health issues such as diabetes in the future.<sup>31</sup>

However, participants also raised a number of concerns in relation to nutraceuticals, particularly when thinking about nutraceuticals in the context of other pressures on the food system. These centred around:

- The idea that functional foods would be ‘unnatural’,<sup>32</sup> and that synthetically or chemically produced food supplements would be ‘missing something’, potentially contributing to illness;

- Discomfort that functional foods would be masking a fundamental **deficiency** in foods, and a concern that nutraceuticals could be an artificial substitution of vitamins lost in excess processing of foods;
- Fear that people in the future would not be **aware** if supplements had been added to foods, or would not have **access** to ‘whole’ or natural foods so would be forced to rely on this to obtain essential nutrients.

“Ultimately, participants worried that innovations in food technology left unchecked could lead to nutraceuticals being used as **substitutes rather than supplements**. The key principle underpinning this was again that people **legitimately retained access to alternatives**, which meant there would need to be healthy, ‘natural’ convenience foods that were affordable (that is, comparable in price to nutritionally enriched foods). Participants hoped that should the market begin to welcome nutraceuticals, Government would have a key role in securing safe and affordable alternatives – for example by subsidising healthy, whole foods.

“I think it’s fantastic the amount of information available now about where food has come from. ... It gives consumers the choice of which product to buy.”  
(Male, London, Wave 2)



### Education, information and transparency

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Many participants were initially quite optimistic about the information that people would have access to in the future.

For example, some hoped that the trend for increased information available on labelling would continue, with future food having clear and consistent indications of sugar content of food, or potentially signposting around any health concerns in relation to additives. There was also some hope that current trends around in-school education and national conversation about healthy eating (e.g., the ‘Jamie Oliver’s School Dinners’ campaign) would produce a more educated consumer base.

One of the scenarios also helped participants think through the level and kind of information they would really want about their food. Participants discussed the opportunities for data provision to

31. This is in contrast to the Which? and GO Science dialogues, where participants remained fairly against non-natural, technological solutions, wishing instead to focus primarily on demand-side, behavioural change solutions. Which? and Government Office for Science (2015). Food System Challenges: Public Dialogue on food system challenges and possible solutions.

32. This reflects the findings of other research about consumer perceptions of naturalness/synthetic food production, including research into public perceptions of chemicals in food conducted by TNS BMRB for FSA: Risk and Chemicals, TNS BMRB and FSA (2015).

support people in making more informed decisions about food in the future.

For example, some were interested in the potential for information provided on labelling to be expanded to include some of the new food issues they had learned about – such as the complexity of supply chains involved, or the global environmental impacts of food production.

These participants thought that the collection and publication of this kind of data would be of benefit to people. It would allow them to check how their food was produced, potentially help them make more informed decisions about what they were eating, and help them assess quality and authenticity.

On the whole, participants still supported the idea of open data for food systems being shared by the food industry, as they felt the mere fact that the data was published would bolster the public's trust,<sup>33</sup> as well as increase visibility of the food system.

However, questions arose about:

- The degree of leverage that having additional data actually afforded to individuals;
- Whether many participants would themselves use this data in reality, in the context of the time it would take to check individual items;<sup>34</sup> and

**“We’ll get to a point where kids don’t even know how to make a sandwich ... I’d much rather see us go back to those basic skills – we need to influence our children and have them learn to cook from us.”**

(Female, Belfast, Wave 2)

- Amongst some, concern that digital data might be ‘easy to fake’.

Despite hopes that information provision would increase, people also raised anxieties about whether people in the future would have the education they needed to support informed choices and behaviours around food. Many participants expressed real worry that although people may have more information in the future they may actually have less skill in terms of choosing and preparing food. As discussed previously, they worried that unless we invest in education now, our younger generations would increasingly lack basic knowledge about cooking, eating healthily, and where food comes from.

Key to this tension was the perception that informal, home-based sharing of food knowledge is being replaced by formal in-school education and Government campaigns. This concern about state

intervention in a traditionally familial domain again highlights the importance of social and emotional connections in the public's connections with food.



## **Power, trust and empowerment**

Participants tended to believe that **the food industry** would continue to be major drivers of our food markets in the future – in combination with consumer demand. They had mixed opinions about the extent to which they would be able to trust in supermarkets and the food industry in the future. Overall, younger people and those in higher socio-economic grades were typically less trustful of the food industry, and slightly more sceptical that things will improve in the future.

In relation to the role of the food industry in Our Food Future, participants initially raised three main areas of concern.

These included: 1) whether we would really achieve an increase in information provided to the public via the food industry, and whether this information could be trusted; 2) whether the food industry would take responsibility for waste at a retail level; and 3) whether the food industry would change marketing practices and offers perceived to encourage over-consumption, and consequent household waste.

**“With so many local growers all operating – it would be impractical to regulate them all.”**

(Female, London, Wave 2)

33. This reflects other research conducted TNS BMRB has conducted for the FSA, where consumers find transparency in labelling to be reassuring, in that it implicitly suggests regulatory oversight: for example: FSA Strategy 2015-2020 <http://www.food.gov.uk/sites/default/files/fsa-strategy-research-report.pdf>; FSA Risk and Rare Burgers <http://www.food.gov.uk/sites/default/files/fsa-risk-rare-burgers.pdf>

34. This reflects previous research conducted by TNS BMRB for the FSA, for example, Balance of Risk and Responsibility (2014), in which participants highlighted the importance of receiving additional information and education from government, whilst also maintaining their ‘right to ignore’ information that was not directly relevant to them.

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“In the future there could be something dangerous and you end up eating something and they’re telling you it’s this but it’s not really. That’s been proved in the horsemeat scandal.”

(Male, Belfast, Wave 2)

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As participants reflected on the role of the food industry in our global food system over the course of research, they almost universally called for further regulation and restriction. Participants wanted reassurance that food businesses with influence over what and how we eat not only maintained quality and safety standards, but were also limited in terms of the proportion of the food ‘chain’ that they owned or controlled.

For example, participants disliked the idea of large agri-businesses or corporations in the future owning farmland, seeing this as a way to exert power over farmers. There was also some concern that the food industry should not be the only bodies investing in research and development, given concerns that they would not share potential solutions to global challenges ‘for the greater good.’

Participants ascribed the more negative outcomes to the development of the technology being driven by profit.

Another theme explored throughout the scenarios was the trade-off between localised production and power on one hand, and transnational and complex production on the other. Participants liked the idea of local food and shorter supply chains supporting the public in knowing where their food came from, yet identified a number of issues:

- The regulation of numerous small producers would be resource intensive for Government, meaning consumers would be more reliant on trust. Though some felt this could be a positive move for

building stronger communities and relationships between producers and the public, others were less comfortable forfeiting safety standards;

- Smaller producers with fewer resources may be more tempted to commit food fraud, or relax standards;
- Some worried this method of food production could not deliver a secure enough supply (e.g. worrying about vulnerability to disease);
- Mixed reactions to the impact on individuals’ access to variety and availability – with younger participants tending to reject this future, at least initially, and some other participants perceiving it as a positive step towards more seasonal consumption.

In light of these challenges, participants conceded that transnational corporations enabling global co-ordination of supply chains might be necessary to retain in the future – and that the notion of small, local businesses having a large role in the UK’s future was unfortunately perhaps unrealistic. Transnational corporations would need to yield some of their power – submitting to Government pressure to act in the public interest, and empowering people through data and education.

The more participants considered the balance of power in the food system, the more they wanted the role of the **state** to grow – driven by the growing unease around corporate power as outlined above. Even those participants who were originally

“If you relax regulations... that can lead to food fraud, and people producing food by means which aren’t quite proper, just to make targets.”

(Female, London, Wave 2)

cynical about Government came to prefer that they held power and oversight of the food system, in lieu of corporate power.

They hoped for a very active and visible role of Government and regulators in the future of food, particularly in terms of supporting actions beneficial to citizen health.

For example, participants hoped that:

- Public health campaigns and regulation would be in place to ban advertising of sugary foods to children;
- Government and regulatory protection would continue to support public safety and health – via regulation but also the provision of education and information;
- Regulatory protection would expand to further limit the use of additives and preservatives; and
- Government would invest in independent research and technology to support sustainable intensification and innovative farming methods.

However, some people raised concerns about whether Government would have the resources required to maintain health and



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safety, whilst also achieving against the goals outlined above.

For example, they pointed to recent 'scares' or scandals to suggest that it was already difficult to detect and prevent fraud or illegal activity. They raised concerns about the feasibility of protecting the food supply in the future given perceptions of reduced Government budgets – and increasing fragmentation and complexity of the food supply.

**“You’d need some kind of authority – Food Police. [Food innovations] would need to be authorised, they’d need to tell us: ‘that is what it says it is’, ‘it meets the recommended daily amount of what you’re allowed’.”**

(Female, Edinburgh, Wave 2)



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**“Ultimately we need to be able to trust what is in our food.”**

(Female, London, Wave 2)



“If you didn’t have the choice, if you weren’t able to have your fresh fruit and vegetables alongside your mass-produced processed food – that would be terrible.”  
(Male, Belfast, Wave 2)

# 7.0 WHAT NEEDS TO BE DONE?

This section outlines what participants thought needed to be done in order to bring about the food future they wanted, as well as what they thought needed to be avoided. This section draws on all elements of research, though particularly from findings from the second wave of deliberative workshops, where participants were most able to comment on what they wanted and how to get there.

## 7.1 What is the Food Future people want to avoid?

Looking ahead, the ‘worst case’ scenario participants imagined was a future

characterised by a struggle to achieve basic standards, where many people did not have enough food to eat, where regulation on food additives and other technologies had been relaxed, and the UK response to food

challenges was one of managing a crisis rather than enacting a sustainable strategy. In this future, people had lost a fundamental connection with and enjoyment of food.

Participants’ fears also centred on a decline in UK self-sufficiency and power in the global food system. Instead, large transnational corporations with monopolies on global networks would hold the power over how we eat – with little incentive to be accountable to public values, or to maintain high quality standards.

This was not a future that most participants thought was likely to happen, though there were some (less extreme) elements that they thought could be probable. These tended to be around the rise of highly processed and artificial foods being consumed, as the changes required to reverse current trends were perceived as difficult to achieve.

Some felt that given increased convenience food and global supply chain complexity, it was inevitably an increased risk of food fraud and ‘tampering’, which would need

### Key findings

Participants’ most optimistic vision for the future was one where technology supported sustainability; regulatory bodies and Government provided checks and balances against corporate influence; and citizens were empowered to make positive decisions.

In order to achieve this, and avoid a future crisis in the food system (typified by artificiality, poor connection to food, and unchecked corporate power), participants outlined roles for different actors in the food system:

- **Governments:** work cooperatively to develop an overarching global strategy for safeguarding food supply; help educate people and ‘nudge’ them to make more informed and healthy food choices; ensure that the food industry acts in the public’s best interests;
- **Consumers:** reduce waste; ensure transfer of skills to the next generation; and consider changing their consumption habits now – although some participants were reluctant to accept this responsibility;
- **Media and Communications:** raise profile of challenges facing the food system in a way that ‘cuts through’ and persuades;
- **Food Industry:** reduce waste and help educate the public.

careful regulation given the complexity in policing this. Participants were also wary about the loss of choice, driven by availability, income and future food prices.

On the other hand, their more optimistic vision for the future included positive technological developments, influential regulatory powers, and educated and empowered citizens. Participants' best hopes for technology lay in advances in sustainable intensification of farming, helping to improve food production whilst managing environmental impact.

In an ideal world, they hoped people would be knowledgeable about food and able to make informed decisions about the food they ate, benefitting from open data sharing by the food industry. Some placed hope in the potential for individuals to be able to use carefully controlled nutraceuticals to help manage medical conditions, or to supplement diets to ensure meals were nutritionally balanced.

Others hoped individuals or consumer groups would also be able to successfully grow their own produce, becoming less reliant on retailers (though these tended to be limited to those already growing food).

For some, the hopes for the future was simply maintain the status quo, and that people of the future would enjoy the same options and abundance of the present day.

Participants outlined several drivers that could bring about the 'worst case' future scenario. These included:

- Inadequate safeguarding and future-proofing for the future of food – that is that those responsible at the highest levels do not recognise how critical the situation is, and fail to act now to tackle some of the challenges.
- At the level of UK Government, poor outcomes were perceived to be the result of 1) resource pressures curtailing regulation; and 2) Government bowing to pressure from the food industry to relax regulation. In short, participants feared the implications of allowing transnational corporations too much power in the food system.
- Finally, low awareness among individuals of the issues facing the food system, and limited knowledge of the wider impact of consumption choices, would do little to shift consumer demand in the right direction.

## 7.2 What are people's key priorities for the future?

In order to bring about the best possible food future, participants overall pointed to a greater role for Government, checks on corporate influence, and collaboration between the various players in the food system. Positive change would also need to be underpinned by an educated and empowered public. The roles participants envisaged for each of these groups are outlined below.

### Role for the public

In general, participants struggled to see how the public could affect significant change in the context of the global, structural challenges facing the food system. As discussed in Section 4.0, and as seen in other research, participants tend to start with changes they believe they can make in their own lives. Participants identified several changes that individuals could make to start to build a better food future for themselves, their families and the public more widely.

This primarily focussed on reducing food waste at a household level – buying and throwing away less. It also meant a commitment to transferring knowledge and educating their children and young people to ensure cooking skills and food traditions were not lost.

Some participants, though by no means all, felt strongly that individuals should change their consumption patterns – for example, buying more locally or seasonally, buying less meat, or choosing food that has been sustainably produced. Whilst some participants thought these would be relatively easy changes to make (and some had already considered them at the time of the workshops, if not already made them), others felt they would need more of a 'push' to get there – placing shared responsibility for changing consumption on Government and industry.

“Regardless of how the future turns out, I know that I want to be kept informed. I want this to be on the news, I want to see what's happening in the world. ... If you have information about food, you have choices.”

(Male, London, Wave 2)

“People also saw Government as having a key role in relation to securing and protecting public health (though there was some overlap in terms of whether it was also the responsibility of industry).”

*“If you aren’t able to actually cook anything for yourself and you’re eating all these fast foods what are we going to be like as a nation?”*

(Edinburgh, Follow-up interviews)



“People know that things are bad for them, they’re unhealthy, but they’ll still go ahead and eat it. You can only tell somebody so much, and obviously there’s a part of the population that doesn’t care! People can’t solve it all by themselves.”

(Male, London, Wave 2)

*“I’ve been thinking more about waste. We were talking about food shortages and so I’m looking at my kids’ plates and what they’re leaving, and I’m trying to encourage them to eat it all. Myself as well.”*

(Male, Edinburgh, Wave 2)

*“I didn’t ever, ever think about the whole journey and the whole process of how food starts as a seed and gets to my plate and I must admit, we waste a lot less now because I’m thinking about it.”*

(Cardiff, Follow-up interview)

There were mixed views about the possibility of collective action. Some participants were very sceptical about effectively mobilising the public as a group to put pressure on Government or industry to make changes. Participants debated the malleability of consumer demand, with some perceiving changes in shopping patterns as a key way for people to shape what products are available, and others characterising demand as a somewhat intractable force.

Even participants more optimistic about the power of the public to ‘vote with their feet’

felt uncertain about how to organise and harness this power, feeling it would take a lot to change the minds of enough people to make a real difference.

*“How hard would it be to get everyone together [to pressure Government or industry about food]. We all have different opinions on things – some want healthy, some want cheap – so is it ever going to be possible to get us all on the same page?”*

(Female, Belfast, Wave 2)

## Role for media and communications

To ensure positive action at both the individual and collective level, participants felt people would need to know more than they currently do about the challenges facing the food system. Yet few felt it was up to the public to ‘educate themselves’.

Participants across the areas expressed a desire for ‘media’ to have a role in triggering and facilitating public dialogue, in the form of documentaries, TV programmes, etc., in order to make some of the issues discussed at the workshops more familiar territory for the UK citizen.

The principle here is not that there is more media coverage of the issues necessarily, but just that they become part of public debate and enter the public consciousness. Echoing discussions on the difficulties shifting consumer demand, participants admitted that they were unlikely to readily engage on these issues in the real world. As such they wanted ‘media’ to be convincing, engaging, and to ‘force them to

care' about things that might be uncomfortable to confront.

## Role for the food industry

Participants' rationales for wanting to reduce corporate control of the food system were based on **mistrust of profit** as the underlying driver of corporate behaviour.

In the context of learning about the size of some transnational corporations, participants on the whole became increasingly cynical about the role of the food industry in the food system, even after discussing the benefits of large corporations (e.g. in co-ordination and securing global food supply, or ability to significantly invest in R&D to support sustainable solutions to production).

This was in part driven by the idea that in the face of immense pressure on the food system, corporate social responsibility would become lower priority – big food business would be less answerable to the public voice. That is not to say that participants did not trust the food industry to produce and sell food that is safe to eat – rather it was distrust that they would voluntarily act in the public's best interest.

Despite expressing a desire for increased controls and checks on the food industry however, participants also outlined some specific, positive opportunities, and were hopeful that positive changes could be achieved. Mirroring their expectations for the public, participants wanted to see evidence of industry's commitment to

## reducing waste at all stages of the food

**chain:** from production techniques to retail and marketing practices. Examples included relaxing quality standards that prevent food that is aesthetically abnormal (but otherwise fine) from reaching supermarket shelves; another was for retailers to stop using offers such as *'buy one, get one free'* that were perceived to encourage over-consumption and food waste.

Publication of production and manufacturing data was also regarded as a positive opportunity for industry. Participants felt that making this data transparent would help reassure people that there were controls at each stage, as well as support regulatory bodies in effectively tracking production and improving food authenticity.

Further to this, participants hoped the food industry could begin to have a role in **educating the public** about the food system. Participants wanted the food industry to go a step further than just providing data, and make use of their proximity to consumers to raise awareness on issues such as sustainability, the environmental impact of food production, and the processes involved in getting food on the shelves. Industry was seen as ideally placed to help close the gap between the public and 'the food chain', but also to empower people to make better decisions about food. Participants suggested using consistent, clear labelling to communicate, for example, the amount of water required to produce a product.

## Role for Government

Participants perceived there to be numerous roles for Government in relation to achieving the best possible food future. These related to 1) their relationship and power over the food industry, 2) their overall strategy and visibility, 3) accountability to public health, and finally 4) as a public educator.

Participants on the whole trusted Government to act in the public interest, and wanted them to persuade industry to follow suit. Participants had little visibility of how 'Government' and 'industry' might interact currently, and struggled to articulate exactly how they wanted this to happen – but felt strongly that they wanted Government to 'hold industry to account' should they fail to act in the public interest.

In light of future challenges, participants wanted reassurance that there was an over-arching strategy for UK Government to intervene in these challenges. As discussed in Section 6.0, participants wanted to avoid a situation of managing rather than tackling problems in the future – and wanted to see a clear strategic plan to avoid this.

A related point raised was around increasing visibility of Government action in this space. Participants struggled to imagine what Government might be doing already in this space, or what they might have authority to do. There is a clear mandate for more communication with people about Government's role in the future of food.

**“I didn't ever, ever think about the whole journey and the whole process of how food starts as a seed and gets to my plate and I must admit, we waste a lot less now because I'm thinking about it.”**



“Government need to listen to the people. The big corporations are just in it for themselves. The rich are just about making themselves richer and don’t care about how they do this and the cost to the environment or the world.”

People also saw Government as having a key role in relation to securing and protecting public health (though there was some overlap in terms of whether it was also the responsibility of industry). This was in terms of maintaining food safety standards (which were currently perceived to be very high), protecting shorter and longer term safety by continuing to regulate and test health impacts of various food technologies and processes, and addressing public health challenges.

Participants felt Government should be focussing on tackling obesity and improving overall public health by ensuring people have easy access to healthy, convenient food options – achieved via subsidising certain foods, regulating retailer and food businesses, and encouraging people to buy them.

Overall, participants identified a number of critical aspirations for the future of food:

- Food waste is **reduced** at every stage of production and consumption
- Food is **good quality** – not only safe but ‘natural’, without additives, pesticides, and tastes good
- Good **quality food is affordable** – there is a cheaper option available for healthy foods (e.g. ugly vegetables). Doesn’t need to be ‘cheap’ but needs to be accessible



.....

“I’ve been looking more closely at the ingredients in food and what chemicals they put in – stuff like that.”

- People have **choice** in the foods they consume – in terms of health (which they need to be educated and nudged to make) and for some, **variety**
- People have a good **understanding** of food, cooking and the food system – through good education and information provision
- Food is still **social** and a site for cultural transmission
- Increased **transparency** and data sharing by the food industry
- **Soil and land management** in the UK is looked after
- There is **investment in research** for sustainable production techniques, crop resistance, etc.

It was recognised that achieving these priorities would not be possible without concerted action from all of the different groups outlined above (including the public, government, media and the food industry), but these principles provide an outline for what our participants hoped to see in the future of food.

### 7.3 Deliberation changes minds, and sometimes behaviour

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As part of the evaluation of this piece of deliberative research, brief follow-up interviews were undertaken with participants after the end of the research process. The independent evaluation group Icarus called participants to ask about what they were thinking and doing after the research process – once they were back in their ‘real lives.’<sup>35</sup>

These follow-up interviews suggest that the issues, challenges and tensions raised during the research process had not been forgotten by the participants. Some people reported that they had changed their behaviour as a result of discussions – for example, reducing waste or purchase more locally produced food. Others had defaulted to old habits – continuing to think about the issues raised, but not taking on responsibility for change.

*“I’d like to say that I’ve gone home and reduced my waste and everything, but I haven’t. I’m so busy at the moment that I just go on as I normally am.”*

However, participants widely reported that even if they hadn’t changed their own behaviour, their time together thinking about our Food Future had been eye-opening and

“I hope there’s enough people who care about their food and for the food industry to take note.”

(Female, London, Wave 2)

influential. People had kept thinking and deliberating - even outside of the research context. And they had begun to take more notice of some of the challenges facing us when issues were raised in the media.

*“Because of what I learnt I’ve been taking more notice of things about food on the TV and in the paper.”*

*“It made me think about my children and their children. They may be competing for food and we never had that, at all.”*

*“If people are more aware and they have the information, they can make more informed decisions for themselves.”*

And at the end of the process, it was clear that participants acknowledged that things need to change – and that they felt that Government, the food industry, the public and the wider media all need to play a role in shaping Our Food Future.

*“If they can do TV programmes for the election, surely they can do programmes on something that’s far more important – like food.”*

.....

“I was in Sainsbury’s yesterday and there was a packet of apples with a Union Jack sticker on them; I picked these apples over another packet of apples that had been grown somewhere else in the world. I wouldn’t have done this in October/ November before I came to the session. It was about 10 or 15 pence more – before I would have gone for the cheapest. I did this because it had all been explained to me on the course. It’s made me think different; that was just me, if you spread that to everybody it would make that wee bit of difference.”



“Why waste the [foods] that don’t look appetising. They should have a shelf in the supermarket in my opinion... where you have the ones that are not quite the right shape or 100% and they should be knocked down in price – it all tastes the same.”







