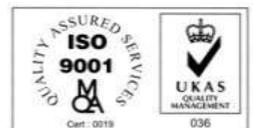


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Food Standards Agency

Synthesis report of consumer engagement insight in Wales

Kantar Public January 2017



Introduction

The FSA has commissioned a wide range of research into attitudes and behaviour around food, to inform policy decisions and communications and to build a strong evidence base around what UK citizens feel, think and do with food. This includes a wide range of work across:

- Deep explorations of public responses to complex policy and communications issues via Citizen's Forum dialogues and workshops;
- Face-to-face focus groups and depth interviews;
- Online forum research and 'diaries';
- Message testing – including online and in-restaurant sessions;
- Tracking data;
- Ad-hoc policy and PR surveys;
- Social media analysis; and
- Desk research and literature reviews.

The following report is a summary of key research conducted by Kantar Public (formerly TNS) for the FSA with participants in Wales and across the UK. Research insight spans areas across a range of broad and more specific subject areas relating to food, drawn from both qualitative and quantitative research methods. The research reports and original data, where available, were re-analysed to identify insights specific to Wales.¹ These are compared to data for England² throughout. The aim of this analysis was to understand food interests and concerns of citizens in Wales.

The quantitative data that forms this analysis is drawn from a range of sources, including standalone research for the FSA as well as research conducted as part of omnibus research, with some projects conducted online and others conducted face to face. This includes data from Wave 3 of the Food and You survey³, the FSA's flagship consumer survey, conducted on biennial basis in 2014 using random probability sampling.

The qualitative data is drawn from published research reports, secondary analysis of analysis charts and transcript data from individual projects. The projects include Citizens Forums (comprising workshops, groups or dialogues with the public), interviews with individuals or food businesses, and online research such as online communities and discussion boards.

Please note that this report summarises *existing research insight* - it does not report on the results of stand-alone, primary research. Further details on the approach for each research piece can be found in Appendix A.

¹ Key differences that are specific to Wales have been drawn out and reported in as much detail as possible, based on the existing data. In some cases, insight from research conducted in Wales reflects and supports overall UK findings – in these cases the UK data is reported.

² NB. It is not possible to compare to 'rest of UK' for most of the projects in this report, as Scotland was not included in the original research (except for Food and You). In order to ensure consistency in analysis between projects, and to avoid confusion or misrepresentation, data is compared to England throughout.

³ Food and You Wave 3. FSA and TNS BMRB (2014).

Convenience

The Our Food Future qualitative research⁴ showed that people across the UK recognise the trend towards more convenient access to food in recent years. This includes access to a wider variety of different foods, convenience foods that are quick to prepare at home, digital technologies enabling faster shopping and an increase in eating out. Participants in Wales felt that convenience foods were more necessary in the modern world because of the increased pace of life and the change in work patterns, such as an increase in women in the workplace and people focusing on their careers.

"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)

However, concerns were raised among participants across the UK about the loss of connection through convenience food, including a perceived loss of social connection, increasingly complex, fragmented food production and retail processes and an increase in waste.

"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)

"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 than home foods, it does encourage you in that way." (Female, Cardiff)

Affordability and healthy eating

One of the main concerns for people in the UK related to food is being able to access to healthy food at an affordable price. The Our Food Future research⁵ found that people across the UK wanted fresh, natural, whole foods, which they felt were less affordable than processed foods. However, they raised concerns about the long-term health implications of eating processed food. There was also some anxiety about food becoming a class issue and a feeling that there is a need for intervention to give everyone a choice of food they consume.

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

The FSA Strategy report⁶ revealed the challenges that people in the UK experience when trying to eat healthily. They considered processed foods to be unhealthy but felt that many people rely on them because they have busy lifestyles or lack the skills to cook from scratch. Some felt that food labelling can confuse people who might be trying to eat a balanced diet because they often display contradictory messages, such as using the phrase 'low fat', while containing a large amount of sugar.

⁴ Our Food Future. FSA and TNS BMRB (2016).

⁵ Our Food Future. FSA and TNS BMRB (2016).

⁶ FSA Strategy 2015-2020. FSA and TNS BMRB (2014).

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Welsh citizens were more likely to agree than those in England that ‘the price of food means I don't always buy what I want to’ (48% vs. 40% respectively) and to buy frozen meat, which tends to be cheaper (41% vs. 33% respectively). Possibly reflecting price sensitivity, Welsh citizens were also more likely than those in England to do most of their shopping in a large supermarket (92% vs. 87% respectively) and less likely to do most of their shopping in a mini supermarket (3% vs. 5% respectively)⁷.

“I don't think we can have an effect on the price as a community but nationally if we boycott and if the whole of Wales said we are not buying your lamb anymore then it would.”
(Female, Aberystwyth)

“I've looked at some many ways to cut costs at home and it just works out cheaper for me to buy convenience foods.” (Male, Aberystwyth)

Food safety in the home

People across the UK have concerns about food safety, but this typically relates to how chemicals in food can affect your long-term health, the authenticity of packaged foods and the risks of poor hygiene when eating out.⁸ Eating at home was of lesser concern in general, although Welsh citizens in the Risk, Rare Burgers and Chemicals survey⁹ were marginally more likely to be concerned about food hygiene at home than those in England (59% vs. 54% respectively). While they may have had a higher level of concern about food hygiene, Welsh consumers in the Food and You survey were less likely to need to worry about what they eat; they were less likely than those in England to have dietary restrictions, which included food allergies, being on a diet, avoiding foods for religious or cultural reasons or being vegetarian/vegan (Net ‘any’ restrictions: 26% vs. 34% respectively).

Findings from the Food and You research highlight that in terms of learning about food safety, those in Wales were less likely than those in England to have done so at school (24% vs. 29% respectively). If looking for information about safe food preparation and cooking in the future, Welsh participants were more likely than their English neighbours to talk to family and friends (22% vs. 18% respectively) but less likely than those in England to go to an internet search engine (37% vs. 49% respectively).¹⁰ In fact, the FSA Strategy report¹¹ found that people across the UK wanted the FSA to continue educating the public about how to handle food safely. They were concerned that people were losing their cooking skills and some were therefore at risk of unhygienic or dangerous food handling practises.

Eating outside the home

Across the FSA Strategy and Our Food Future research, Welsh citizens said that when eating out, they felt they were ‘treating themselves’. According to the Food and You survey, those in Wales were less likely than those in England to think that healthy choices are

⁷ Food and You Wave 3. FSA and TNS BMRB (2014).

⁸ FSA Strategy 2015-2020. FSA and TNS BMRB (2014).

⁹ Risk, Rare Burgers and Chemicals. FSA and TNS BMRB

¹⁰ Please note that these results may be influenced by access to the Internet. During the time of research (F&Y Wave 3, 2014), Internet access in Wales was lower compared to England. See Ofcom research <https://www.ofcom.org.uk/about-ofcom/latest/media/media-releases/2015/cmr-wales-2015>

¹¹ FSA Strategy 2015-2020. FSA and TNS BMRB (2014).

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important when eating out (25% vs. 32% respectively) and were less concerned about the price (42% vs. 49% respectively considered it important).

The food hygiene standards of an eating establishment are very important to people in Wales as highlighted by the Food and You research: Those in Wales were more aware of, and utilised more formal food hygiene standards when eating out compared to those in England:

- they were **more likely** to say that a **good hygiene rating is an important factor** when deciding where to eat out (38% vs. 30% respectively)
- they felt **more strongly that food hygiene rating schemes are very helpful** when choosing where to eat (69% vs. 49% respectively)
- they were **more likely to judge the cleanliness of an establishment by a hygiene sticker** (41% vs. 27% respectively)
- they were more likely (35%) than those in England (20%) and Northern Ireland (28%) to have checked Food Hygiene Ratings before visiting food establishment in past year.

Food risks and food production

Education

Citizens across the UK welcome the trend for increased education about food, especially in schools, and being better informed than previous generations about what is in our food through food labelling. The Our Food Future research¹² found that people want to know more, including what challenges are faced by the food system.

Food poisoning

According to the Food and You survey¹³, those in Wales were less likely than those in England to have experienced food poisoning in the past (35% vs. 40% respectively), including within the past year (4% vs. 7% respectively). This could explain why those in Wales were less likely than those in England to be concerned about food poisoning such as Salmonella and E.Coli (46% vs. 56% respectively)¹⁴.

Although the 'Experimental Testing of Risk Messages Around Rare Burgers' report found that Welsh citizens were more likely than those in England to think that there is a risk with eating rare/medium burgers (70% vs. 61% respectively) even after exposure to risk messaging, they were actually less likely to be concerned about eating an undercooked burger in a pub/restaurant (31% vs. 44% in England). The risk messages shown to research participants also seemed to have less impact with Welsh citizens; they were less likely than those in England to want to find out more about the risks of eating undercooked beef burgers (40% vs. 52% respectively for one of the messages) and less likely to think that it is important the public is made aware of this issue (72% vs. 81% respectively for one of the messages).

In similar research, participants explained that if they ate rare burgers, they felt they would be minimising the risks by buying good quality meat to cook at home or they would eat out in a 'posh' burger restaurant where they expected standards to be higher.

¹² Our Food Future. FSA and TNS BMRB (2016).

¹³ Food and You Wave 3. FSA and TNS BMRB (2014).

¹⁴ Experimental testing of risk messages around rare burgers. FSA and TNS BMRB (2016).

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"I don't think the lower star places (food outlets) would risk doing rare burgers because they'd probably end up giving someone food poisoning." (Female, Cardiff)

The trend for rare burgers was attributed to food outlets, such as gourmet burger restaurants or farmers' markets where staff offered to cook the burger 'medium' or recommended that method of cooking as most flavoursome and juicy. This gave some participants the idea to cook rare burgers at home.

Chemicals in food

As noted in the FSA Strategy report¹⁵, people across the UK are concerned about the potential long term harm caused by chemicals in food and the increased consumption of processed food. Those in Wales were particularly concerned about chemicals in food. They were:

- **More concerned** than those in England **about chemicals present in food** (70% vs. 61% respectively)
- **More likely to disagree that 'the benefits of adding chemicals to food outweigh any risks'** (43% vs. 35% respectively)
- **More likely to agree that 'man-made chemicals in food are more dangerous than natural chemicals'** (51% vs. 44% respectively)¹⁶

The 'Risk and Rare Burgers' research¹⁷ found that people in Wales were concerned about a range of issues regarding chemicals in food, including short term and long term risks to human health and risks to the environment.

"I would say pesticides and chemical washes would be most (concerning)." (Female, Cardiff)

"In terms of my health, I'd say that one is most concerning, the veterinary medicines, antibiotics, you can become immune to them...it can cause all sorts of fungus problems...but from an environmental perspective the pesticides (are most concerning)." (Female, Cardiff)

There's always a risk because you don't know what the effect of it will be 10, 20, 30 years down the line...' (Male, Cardiff)

"My Gran couldn't feed my brother or sister anything made with that (additive) in it...it was the food that was making them absolutely berserk." (Female, Cardiff)

In order to ease concerns about the potential risks involved with chemicals in food, the FSA Strategy research¹⁸ revealed that citizens across the UK expected stringent food safety and hygiene regulations backed up with regular inspections and heavy fines or prison sentences. They would also like food labelling to be clearer when a product contains potentially harmful chemicals.

Power, Trust and Empowerment

Citizens across the UK tend to think that market forces have the most influence and power in shaping the food industry, followed by Government and then the public¹⁹. The opposite was true in terms of the order in which they feel the public's best interest would be served. When

¹⁵ FSA Strategy 2015-2020. FSA and TNS BMRB (2014).

¹⁶ Risk, Rare Burgers and Chemicals. FSA and TNS BMRB

¹⁷ Risk, Rare Burgers and Chemicals. FSA and TNS BMRB).

¹⁸ FSA Strategy 2015-2020. FSA and TNS BMRB (2014).

¹⁹ Our Food Future. FSA and TNS BMRB (2016).

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specifically questioned about it, people worried about the influence of large food businesses and the potentially negative effect they can have on consumers, public health and the environment.

"Whoever has the money is in control really." (Female, Cardiff)

"They're 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)

"If they (supermarkets) decided not to import them then we wouldn't be all that bothered about having strawberries out of season... How can we get them to change their policies... you'd have to have a ground swell of hundreds of thousands of people." (Male, Aberystwyth)

The 'horsemeat scandal' revealed that a lack of transparency around food production allowed the food industry to adopt deceptive practices, including using fillers to increase a product's weight, labelling imported food as British when it has only been packaged in the UK and using jargon and small print on food labels to hide unhealthy ingredients²⁰. This FSA Strategy research concluded that people want the Government to increase transparency by ensuring food is labelled using familiar and consistent terminology, visual markers to flag high levels of chemicals and restrictions on the use of 'natural' imagery to sell processed foods.

The Our Food Future research also found that although the public feel that 'someone' is looking out for their interests regarding food safety, they are unsure about what the Government or regulators' roles are more widely in terms of ensuring the availability of affordable, safe, healthy food, or ensuring transparency in food marketing. The Regulating our Future research²¹ demonstrated that the public rely on the FSA and Government to know how to protect them in terms of food hygiene at food establishments. Overall, people felt that the regulatory system must be working well as they were not getting ill from eating out and incidents like the 'horsemeat scandal' are rare, but when considering changes to the system they wanted to maintain strict procedures such as regular (annual) inspections by local authority personnel in restaurants.

Thinking ahead, citizens wanted more visibility from the Government in protecting their interests, providing information and education and intervening in marketing and retailing that promoted unhealthy or wasteful food choices²². They believed that governments around the world would work together to address the global challenges facing the food supply but felt that budgets and the complexity of the challenge could limit their impact.

Hopes for the future

Analysis of recent FSA research demonstrates that although there were some differences in experiences and attitudes to food in Wales, their priorities remained broadly consistent with other UK nations. Citizens want:

- Access to safe and healthy food that is affordable

²⁰ FSA Strategy 2015-2020. FSA and TNS BMRB (2014).

²¹ Regulating our Future. FSA and TNS BMRB (2016).

²² Our Food Future. FSA and TNS BMRB (2016).

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- Access to information about food – including clear and consistent labelling on products and transparency about food production
- Stringent food safety and hygiene regulations
- Investment in sustainability
- Government and the FSA to visibly champion their interests, especially against ‘big business’

Summary

On the whole, citizens in Wales share similar views with other UK consumers in terms of what is important to them about the food they buy and eat. Compared to consumers in England, citizens in Wales are more likely to be sensitive to price when considering food purchasing decisions at home, although less likely to be concerned about price (or healthy food choices) when eating out.

Despite the fact they were less likely to have experience of food poisoning or be concerned about Salmonella or E.Coli, Welsh citizens also tend to be more likely to use formal food hygiene tools such when eating out and to find these helpful. Compared to England, citizens in Wales tend to hold slightly more concern about the chemicals in their food.

The following research pieces were included in this insight summary:

- **FSA and TNS BMRB (2014). Food and You Wave 3.**
 - Key question: How do the public understand and engage with the Agency's aim of improving food safety, what is their response to messages and interventions aimed at raising awareness and changing behaviour, what are the target groups for future interventions and what changes are there in reported attitudes and behaviour over time.
 - Method: Face to face in-home interviews with 3453 participants UK-wide (including 524 in Northern Ireland)

- **FSA and TNS BMRB (2016). Our Food Future.**

<https://www.food.gov.uk/newsupdates/campaigns/ourfoodfuture>

 - Key question: What are the public's priorities in relation to the future of food – to inform how we respond to pressing challenges facing the global food supply.
 - Method: Iterative, mixed method approach including:
 - Scoping exercise: online quant survey of 1,383 UK participants
 - Online qualitative forum with 22 participants
 - Deliberative 'Citizen's Forum' research consisting of:
 - 63 participants x 2 waves of research
 - 190 research contact points total
 - England, Scotland, Wales and Northern Ireland

- **FSA and TNS BMRB (2014). FSA Strategy 2015-2020.**

<http://www.food.gov.uk/sites/default/files/fsa-strategy-research-report.pdf>

 - Key question: What are citizens' key concerns in relation to food? What do they expect from the FSA/Government in terms of safeguarding these interests? What drives these interests and concerns?
 - Method: Iterative, mixed method approach including:
 - Knowledge review of Food and You, Biannual Tracker Survey and Citizens' Forum data
 - Review of findings from national online omnibus with 2000 respondents (conducted by Harris Interactive)
<https://www.food.gov.uk/sites/default/files/fsa-strategy-omnibussurvey.pdf>
 - Citizen's Forum research with 100 participants X 2 waves of research across England, Wales and Northern Ireland

- **FSA and TNS BMRB (2016). Regulating our Future.**
 - Key question: What do the public think about future changes to the food regulation system?
 - Method: Deliberative 'Citizen's Forum' research consisting of:
 - 35 participants x 2 waves of research
 - England, Wales and Northern Ireland

- **FSA and TNS BMRB (2016). Experimental testing of risk messages around rare burgers. (in publication).**
 - Key question: What kinds of on-menu messages will best help us support the public to 'stop, think and choose' before eating rare burgers, without adversely impacting industry?
 - Method: Online experimental message testing and questionnaire of 2,000 participants via the FSA Consumer Panel

- **FSA and TNS BMRB (2015). Consumer understanding of food risk: rare burgers.**

<http://www.food.gov.uk/sites/default/files/fsa-risk-rare-burgers.pdf>

 - Key question: How can we support people to 'stop, think and choose' in relation to rare burger consumption?
 - Method: Iterative, mixed method approach including:
 - Citizen's Forum research consisting of 80 participants x 1 wave of research

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- 23 in-restaurant mobile message testing and interviewing sessions – whilst participants ordered burgers
 - Online discussion follow-up with all in-restaurant participants
 - An online survey of 2,708 participants using the FSA's Consumer Panel
 - All strands of research engaged participants from England, Wales and Northern Ireland
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- **FSA and TNS BMRB (2015) Risk, Rare Burgers and Chemicals**
 - Key question: What are consumer attitudes and behaviours around rare burger consumption.
 - Method: Survey of 2,708 consumers using the FSA's Consumer Panel