The UK Public's Interests, Needs and Concerns Around Food

Qualitative and Quantitative Evidence on Public Interests, Needs and Concerns around Food across the UK

Conducted for the Food Standards Agency and Food Standards Scotland by Bright Harbour, in partnership with Esposito Research and Strategy and AndGood

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Preface

A comprehensive view of public food interests, building on previous evidence

This research was commissioned by the Food Standards Agency (FSA) and Food Standards Scotland (FSS) to provide a detailed 'snapshot' of people's interests, needs and concerns around food. It explores what key food interests the public would like to see represented and protected on their behalf - in relation to food hygiene and safety but also more widely.

It draws on qualitative research with 95 participants; a nationally representative survey of 6,175 UK respondents; input expertise from a 'People's Voice Board'; and input from academic Dr Christian Reynolds (Centre for Food Policy at City, University of London).

In many ways, the topics, public needs and interests represented in this report are not 'new'. The concerns and priorities it documents are largely well evidenced in previous FSA/FSS[1] and wider research over the last decade or more. Citations to this foundational evidence are included throughout. However, the shape, intensity and breadth of these interests has varied and evolved, particularly under the rapid and deep change of the last few years - in ways that policy-makers will need to be aware of and account for.

Key contextual drivers of public attitudes and views

The time and context of this work have shaped public experiences and views on multiple levels, as summarised below. Individually, each of these contextual drivers are complex, powerful and nuanced. Collectively, they reflect profound changes to public context generally and around food. We ask readers to keep this wider context of change, uncertainty and instability as shaping the views expressed in this report.

Context Level	Influential social and media issues/drivers	Impact
The 'Big Picture' UK and global economics and politics	Pandemic.[2] Brexit. Rising concern about climate change. Increasing social inequalities[3] and financial precarity.[4] Free school meals campaign.[5] Uneven public trust in Government and in food businesses.[6]	For many, a sense of instability, precarity, worry about the future.
Personal Context The context in which the public make food decisions	Financial insecurity. Food insecurity.[7] Shortages. Time pressure. Mental health pressure.[8] Need for convenience food. Information overload. Widespread challenges to 'healthy' eating.	Pressured decisions. Reduced sense of agency. Increasing insecurity. Feeling unsupported.
Fieldwork Window Nov/Dec 2021 (qualitative) then Jan 2022 (quantitative)	Omicron restrictions.[9] Petrol shortages. Rising energy prices.[10] Government party 'scandal'.[11] Winter/holiday finance crunch. Food shortages.[12] End of £20 Universal Credit uplift.	Fieldwork moment of particularly high stress - in the shadow of prolonged crisis.

Public priorities are complex, fluid and multi-layered

As in previous FSA research, the public's experiences, views and concerns around food reported here are complex and multi-layered. People's food worlds are experienced holistically, as are priorities and concerns related to food affordability, quality, health, ethics and so on. This can be a challenge for policy-makers who typically operate in more clear-cut 'issue siloes', as public concerns and interests rarely operate in isolation.

Public priorities around food are also extremely fluid - even contradictory. People's views about 'what matters' shifts depending on their focus: immediate and personal needs and challenges on a typical day - or the more abstract and long-term (the future, the environment, and so on).

To aid the reader, after establishing contextual factors that shape views and needs across topic areas, 'wider interests' are discussed broadly in the order of public importance - flowing from the immediate to the longer-term. However, we ask the reader to remember that in practice, 'ranked' priorities were less clear cut. Unsurprisingly, people want support both *for now* and *for the future;* for policy-makers to support both their immediate and longer-term interests.

Thank you

To the members of our People's Voice Board for guiding this process throughout: sharing your lived experience; acting as our conscience around inclusivity and public respect; and reviewing materials and findings to ensure they felt fair and accessible.

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Executive Summary

Introduction

The Food Standards Agency and Food Standards Scotland have a long-standing history of open policy-making, founded in rich evidence gathering and participatory discussions with the UK public about their experiences, needs, interests and concerns around food.

As a result, they have amassed a substantial, evolving evidence base about public priorities and interests around food safety and hygiene issues - but also 'wider interests' that shape public food worlds. This research has clearly shown that the UK public care deeply about a wide range of food spaces - with often passionately felt interests and concerns around health and nutrition; environment and ethics;[13] our potential 'food futures;[14] and so on.

This research was commissioned to build on this existing evidence, providing up-to-date insights on the 'wider interests' around food that the public want represented and protected on their behalf. It explored the views of both the 'general public' as well as groups that are traditionally less heard by policy-makers.

Method and Sample

Data were gathered using multiple methods over several stages of research:

- **A rapid mapping of existing evidence** shaped project objectives and materials
- **A 'People's Voice Board'** of 8 UK people guided the project throughout.
- **75 'general public' participants** were engaged in qualitative research via group workshops, remote ethnography tasks, and 1-1 depth interviews

- **20 ‘targeted groups’ participants** were engaged via mix of depth interviewing and remote ethnography, boosting understanding of typically ‘less heard’ groups
- **A nationally representative online survey, reaching 6175 respondents** across the four nations of the UK validated and extended qualitative research findings

Key findings: Contextual Drivers Shaping Public Interests and Concerns

Below we present contextual issues and challenges that shaped public interests, attitudes and needs across different topic areas - such as food safety and hygiene, health and nutrition, and ethics and environment. These wider contextual drivers of public experiences and needs must be taken into account by policymakers seeking to support the public’s ‘wider interests’ around food, in order to ensure that policies resonate with the realities and challenges of everyday people’s lives.[15]

Many feel pressured and unsupported in relation to their food choices

- People found it difficult if not impossible to successfully ‘juggle’ competing drivers (for example price, value, budget, convenience, health and so on) - in order to make choices that aligned with both their short-term and long-term interests and concerns.
- There was a sense that ‘no choice is perfect’: the tasty meal may not be healthy; the quality meal is too expensive; the healthy meal takes too long to make; etc.
- Price often won out as a driver of food choices, leading many to make uncomfortable compromises around health, environment, and wider ethical values, - and for some more pressured groups, around ‘basics’ like safety or sufficiency.

- Many also found it difficult to access trustworthy information and guidance to shape their food choices - making it harder to navigate these pressures.

Existing concerns are being amplified by wider contextual uncertainty and pressure

- Wider uncertainty and pressure had a negative impact that was evident across all nations of the UK, equally in rural and urban areas, and across all levels of society.
    - Only 53% of survey respondents agreed they felt 'optimistic about the future'.
    - In some qualitative groups, financial pressures in particular were causing visible distress; some groups were stopped for participant care reasons.
- Concerns seemed to be amplified by an increasing lack of trust that key food decision-makers have the public's best interests at heart.
    - The public worried that our food systems and decision-makers (including food businesses and 'Government') prioritise profit over people.
    - Business was assumed to be the most powerful force in shaping our food systems, but trust was low - 56% of survey respondents expressed concern for the future over 'the power of big food manufacturers and retailers'.
    - Trust in 'Government' decision-makers was even lower. Only 32% of people trusted the Government to 'act in their best interests'. Only 14% saw the Government and 11% saw local authorities as a trusted 'source of information about food'.
    - Note that the specific role of the food regulator (FSA/FSS) in the food system was not discussed in depth. In previous research the FSA has tended to attract quite high trust rankings from the UK public.[16]

Food security is under threat, particularly amongst more marginalised groups

- Most people were feeling at least some level of financial pressure around food choices.[17] Food prices were a 'flashpoint' of deep public concern and worry.
    - 20% of survey respondents spontaneously mentioned food prices as an area of future concern - well ahead of any other spontaneous mentions.
    - Whilst people on higher incomes had more agency and were better able to afford food that fit their values and had greater access to wider choice, many had also experienced rising costs, food shortages and/or increasing financial pressure or uncertainty.
    - A majority of respondents (65%) had modified their food behaviours as a result of financial concerns.[18] Access to food seemed less taken for granted than it was a few years ago - for some a source of deep public concern.
- Many were food insecure - in ways that mirrored existing social-inequalities:
    - 28% of respondents in this research reported behaviours associated with low or very low food security[19]. For example: reduced quality or variety of food, not eating when hungry, or skipping meals for financial reasons.
    - Food insecurity was more prevalent among those on lower incomes; Millennial and Gen Z respondents; people living in larger households; and for Asian, Black, African and Caribbean people.

Key findings in detail: The Public's 'Wider Interests' around Food

As noted in the preface, the public's needs and concerns around food were experienced as connected and intertwined - topics that constituted distinct policy areas for the regulator were seen by the public as interconnected: for instance,

animal welfare and food safety, or healthy nutrition and affordability. This made ranking their interests a challenging task for respondents.

Given the pressures outlined above, on a day-to-day basis, people tended to prioritise their immediate needs and concerns: ensuring the food they ate was safe and as healthy as it could be for the budget they had to spend. For most, wider ethical, environmental and food systems interests took a backseat in day-to-day food choices - as a result of financial or time pressures, lack of availability or accessibility. However, these systemic considerations were deemed by people as important to resolve in the long-term, and the frequent compromises made around these issues was a source of deep worry .

In this report we explore the public's 'wider interests' in broad order of priority:

1. Ensuring equitable, affordable access to safe, healthy food;
2. Ensuring high quality UK food safety, hygiene and standards;
3. Ethics, environment and systems issues; and
4. Ease of making healthy, nutritious choices.

However, in practice, the public's priorities were not as clear cut as this simple 'ranking' would suggest. For example, many took passionate interest in long-term and future-facing topics, they just didn't feel they had the agency to act on these in their own personal choices, especially on a day-to-day basis..

Tangible, specific topics also sometimes attracted more public interest than complex concerns. For example, topics like 'plastics waste' or 'supporting British farmers' were ranked as stand-out priorities for action - even though these were not necessarily the highest priority concerns overall.

The public wanted decision-makers to support *both* their immediate interests and concerns - to make it easier for them to make everyday food choices that aligned

with their needs and values - and to protect the long-term interests of people and planet.

Priority area 1: Equitable, affordable access to safe, healthy food

- Concerns related to rising prices, the affordability of healthy food and social inequalities dominated - in terms of current worries; concerns for the future, and priority actions. This was seen as a topic space affecting all public food interests.
    - 76% chose 'the price of food' as a concern for the future of food over the next three years[20] - with even higher agreement amongst those already more likely to be food insecure; people with long-term health conditions; women; Asian, Black, African and Caribbean people; and people with food allergies or intolerances.
    - 68% saw the cost of healthy food as a major concern for the future
    - 64% of people cited 'food poverty and food inequality' as a concern for the future of food in the UK over the next three years.
    - Ensuring 'healthy food at affordable prices' was the top priority for action for food industry[21], and the second-highest priority action for 'Government'.[22]
- Notably, this was a top priority area even for those who were highly food secure, likely reflecting both concern for others as well as an increasing sense of diminishing affordability even for the more 'well off.'

Priority area 2: Ensuring high-quality food safety, hygiene and standards

Food safety, hygiene and standards were seen as priority public interests that needed to be represented and protected: no one wants food that will make them

unwell or is produced to questionable standards. In the minds of the public, 'high standards' were also associated with better health impact, and more ethical, sustainable practice. Key findings in this space were as follows:

In general, public trust in current UK food safety, hygiene and standards was high

- 79% agreed with 'I trust that the foods sold in shops are made and stored according to good food safety standards',[23]
- 78% agreed with 'I trust that the places I eat or buy from are handling food safely and hygienically'.
- Qualitatively, people perceived UK food hygiene and safety standards as 'higher' than those in other countries - especially around hidden ingredients, hormones and food cleaning (for example chlorinated chicken).

Participants in qualitative groups expressed a sense that 'someone' was looking after food safety, hygiene and standards for the greater good. However, knowledge of the specific remit and role of the regulators varied between individuals and was generally low. The most visible aspect of the regulators' role was perceived to be the safety inspection ratings on food outlets' doors, but many were interested in finding out more about the regulators' activities.

However, lower income and less food secure people expressed more concern

- Concerns around safety, hygiene and standards were higher across a number of measures for people on lower incomes (less than £19,000 annual household income) and/or those who were less food secure.
- This seemed linked to wider concerns and worries about 'risky' practices employed to help make money stretch: for example eating or freezing about-to-expire food; batch cooking; buying 'lower quality' foods, etc.
- Concerns might also have been influenced by a general sense of precarity more widely; many had nowhere else to compromise in their food budgets.

Many worried about whether standards will be maintained post-Brexit

- 50% expressed major concerns about food standards post-Brexit. In particular, many worried that post-Brexit, 'poor practice' from abroad will increasingly decrease the safety and quality of food available in the UK.
- Participants in the qualitative research widely wanted high standards upheld in the future. Amongst survey respondents, 44% explicitly stated that high standards of food safety and hygiene across the food chain are important to them for the future.

Many wanted action on wider 'safety' issues: processed food and animal welfare

- Concerns around the long-term health and safety implications of processed foods were widespread, with many wanting action in this space.
- 61% expressed concerns about the 'over-processing' of food in the future.
- 47% stated they would like to see regulatory action in order to 'reduce things added in the food process for example, E-numbers, preservatives'.
- 60% also rated treatment of animals in the food chain as a major concern.
- Qualitatively there was a sense that fair treatment of animals in the food chain goes hand-in-hand with good food safety and quality standards.

Priority area 3: Guiding fair, ethical and sustainable food systems and futures

The public didn't feel much agency in terms of their 'wider interests' around food system ethics and environment; their values in these spaces tended to be sacrificed for more immediate drivers, especially in response to financial pressure.

Accessing trustworthy information in this space felt hard. Many did not trust the information provided by food businesses, and on-pack information about environmental impact and animal welfare weren't easy to understand, or didn't include the kinds of information people wanted. For example, participants noted that it was hard to get a sense of things like 'food miles', land use, hormone or

pesticide use, and so on.

The public wanted the Government, food industry and the FSA/FSS to work together to guide fair, ethical, sustainable food systems and futures on their behalf.

Most immediately, people wanted to see protection for British farming post-Brexit - and were eager for support for more 'local' food systems (UK origin)

- 59% said they were worried over the future of British farming.
- 58% expressed concerns over the UK's dependency on food imports.
- 59% agreed with 'I trust local food producers to have higher quality standards than big business', but only 47% said they actively try to buy from local food producers.
- People wanted to see decision-makers maintain or strengthen ethical standards in the food chain, for example around animal rights - both for UK-made and imported food products.

More broadly, climate and animal welfare concerns dominated

- Qualitative research showed that interests and concerns in this space felt increasingly more immediate and more relevant to more people.
- 60% of people were worried about the environmental impact of our food systems.
- 58% cited the impact of climate change on food production as a major concern for the next 3 years.
- 41% chose 'a food system that treats animals in the food chain with dignity' as a key action area for the next 3 years.

Food waste and packaging waste were flashpoints for concerns:

- These issues seemed to 'push a lot of buttons' at once, with respondents already taking action at individual level.
- 78% reported finding it 'unacceptable' to throw food away at home.

- 67% agreed with 'I try to reduce or avoid food products that create plastic waste'.
- 65% said they worry about packaging waste in the food chain in future.
- 64% cited food waste in the food chain as a major concern for the future.

Ethical treatment of food system workers is potentially an emergent concern.

- 46% said that they saw treatment of workers in the food chain as a major concern.
- 32% cited fair treatment of these workers as a priority over the next 3 years.
- 48% chose 'ensure fair treatment for workers, farmers and small producers in the food chain' as a priority area for action from the food regulator.

Priority area 4: Making it easier to access and choose healthy, nutritious food

As above, price dominated within health and nutrition concerns, with many feeling 'priced out' of the food they thought was best for their health. Beyond price, the public also felt it was far harder than it should be to make healthy, nutritious choices; that the 'system was stacked against them.' However, guidance on healthy nutrition tended not to feature highly in ratings of priority actions. Key findings in this space:

Most wanted to eat healthily and feel they broadly know what 'healthy' food is

- People wanted to live healthy lives, even if this requires effort - 63% agreed they were 'prepared to make big changes to their lifestyle in order to be healthier'.
- Most (70%) also agreed that they felt 'confident I know what a healthy nutritious diet is for me' - qualitatively, a healthy nutritious diet was typically associated with 'fresh', minimally processed food and wide variety.

However, making healthy, nutritious food choices feels challenging in practice

- Price and other pressures often pushed out health and nutrition ideals
    - 53% agreed that they felt priced out of healthy food and 31% endorsed ‘it is difficult to find fresh foods that fit my budget’.
    - 54% agreed with ‘supermarkets encourage me to buy unhealthy foods’.
    - 25% agreed with ‘heavily processed foods are often the only option available to me.’
    - 50% reported worry about the long-term impact of their food choices on their health (significantly higher for those aged 18-44 (60%) or from BAME ethnicities (61%).
- A majority also felt confused or misled by industry information about ‘healthy food’.
    - A range of issues were raised around interpreting and navigating health information (for example overwhelm, text size, portion confusion, ‘hidden’ sugars’).
    - 61% stated they often felt ‘that foods labelled as ‘healthier options’ (for example, low fat, low sugar, plant-based meat alternatives) were unhealthy in other ways’.
- Guidance to support healthy choices often feels unhelpful or ‘too simplistic’
    - Advice often felt more theoretical than practical, not reflecting modern pressures, conflicts, tensions, health needs, personalised diets, and so on.
    - More financially pressured respondents particularly were interested in ‘real life’ guidance for eating on a budget: support to navigate abstract ‘rules’ into actual shopping decisions.

Chapter 1: Introduction

In this chapter we outline the context in which this work was commissioned and delivered; our key objectives; and the methods and samples used in our mixed-method qualitative and quantitative investigation. Please see the Technical Report for full methodology and sample detail.

1.1 Background to this research

The Food Standards Agency (FSA) and Food Standards Scotland (FSS) are independent Government departments tasked with ensuring 'food we can trust' for people in the UK and ensuring that food has a strong reputation for safety and authenticity both in the UK and abroad. Beyond food safety, their work also supports wider public interests around food - topics such as food price, availability, standards, and (some elements of) standards around environmental and animal welfare concerns.[24]

The FSA and FSS have amassed a rich evidence base[25] on what matters to the UK public in relation to food and food governance, including how their views, behaviours and needs have changed over time. This evidence base has consistently shown that the UK public have strong views and needs around wider food topics that stretch far beyond food safety. It also shows a clear public expectation that decision-makers should work collaboratively and proactively to ensure that these needs and interests are protected.[26]

The last several years have presented widespread and rapid change that has profoundly shaped both the evolving UK food system and the public's experiences within it:

- Pandemic disruption has often accelerated existing trends in changing people's food behaviours and attitudes. Over the last two years, many have

reassessed how they eat, where they shop and what their priorities are around food.[27]

- Brexit has caused profound shifts in UK supply chains and standards,[28] raising public awareness and discussion of these kinds of systems-level food issues.
- Food availability has been disrupted, especially in devolved nations and more rural locations.[29] 56% of UK people experienced some level of shortage in Q4 of 2021.[30]
- The UK public are increasingly interested in the environmental implications of our food systems - a majority of people reported feeling concerned about the impact of food production on the environment (sustainability) and the welfare of animals in the food industry (both 62%).[31] A similar pattern is observed in our findings.
- Half of UK families have experienced reductions in disposable income since 2019,[32] at the same time that food prices have risen, including sharp rises during periods of lockdowns[33] and higher rises for basic / budget food items.[34] Rates of food insecurity and food-bank dependence have increased substantially.[35] [36] [37]

In light of this rapid and widespread change, the FSA and FSS commissioned this research to provide up-to-date understanding of:

1. **how the public's wider interests around food are changing**, and the key experiences and influences that shape their views and needs;
2. **how experiences, views and needs vary**: what matters most to whom, and who is most affected by any current challenges in the system;
3. **expectations and priorities** in terms of how the FSA/FSS and others ensure these wider needs and interests are heard, represented and protected.

1.2 Developing the research aims and objectives

Our research was designed to explore the following six topic areas, all of which were consistently highlighted in previous research as shapers of UK food experiences:

1. **Food safety and hygiene** - exploring changing views or emerging challenges around the FSA/FSS core remit: ensuring food is safe to eat right now and in the future, and being able to trust that the places people eat are handling food safely.
2. **Health and nutrition** - what people feel makes it easier and harder to eat in ways that nourish them and support their health, and what they would like to see done in this space on their behalf.
3. **'Juggling' price, value, quality and convenience** - how easy people find it to make food choices that work for them whilst balancing sometimes competing drivers in terms of budget, food quality, nutrition and convenience needs.
4. **Trust and transparency** - whether people feel they can get clear, trustworthy information about their food and the food system - for example, in terms of information on food labels, but also more widely.
5. **Animal welfare, environment and future generations** - the impact of the food people eat and food systems on animals, the environment, and future generations.
6. **Regulation and communications** - whether people feel the Government is protecting their interests and needs around food, whether they feel they have the information they need to make decisions, and what they need to see, hear and believe to feel that their interests have been protected.

The specific objectives explored within each key topic area evolved over the course of the research.[38] Our approach and materials were also shaped by:

- **Rapid mapping of existing literature and insight**[39]
- **Input and guidance from a 'People's Voice Advisory Board'** [40]
- **Support from our academic partner: food systems expert Dr Christian Reynolds** (Centre for Food Policy at City, University of London).[41]

1.3 Qualitative primary research

A total of 95 participants were included via a mix of group workshops, remote ethnography tasks, and 1-1 depth interviews.[42] This included 75 'general public' participants, and 20 people from 'targeted groups - people typically less heard by policymakers.

Sample and approach summaries are provided below. Please see the Technical report for full methodological, sample and analysis details; copies of materials used; and information on participant safeguarding.

1.3.1 Sample and approach: 'general public'

Our 'general public' sample included a roughly representative spectrum of UK participants in terms of demographics (age, gender, lifestage, income, ethnicity, nationality and so on).

- **Total sample:**
    - **n=75; 40 England, 10 Wales, 10 NI, 15 Scotland**

- **Approach:**
    - **13 x 1.5 hour group workshops with a pre-task (n=75)** - the pre-task included two short 15-minute tasks to identify the core topic spaces to explore with participants in the group workshops.

- **Two week online ethnography (n=40)** - A selection of general public participants completed 5 online tasks each over the course of 2 weeks, exploring around 4 interest areas each.
- **13 x 1.5hr group workshops with a pre-task (n=70)** - all participants came together for a final workshop focussed on public priorities for policymakers.

1.3.2 Sample and approach: 'targeted groups'

- **Total sample: n=20; 11 England, 3 Wales, 3 NI, 3 Scotland**
    - 11 people with household health issues or disabilities shaping food choices;
    - 9 ethnic/religious minority participants;
    - 5 older adults (age 70 plus);
    - 6 very low income participants, and 9 who had experienced some level of food insecurity in the last year.
    - 4 people who were less digitally confident.

- **Approach:**
    - **20 x 1-1.5hr targeted depth interviews** - 1-1 sessions allowed focussed exploration of participant contexts and how these shaped interests and needs.
    - **6 x follow up tasks** - to explore topics in more depth.

1.4 Quantitative primary research

The approach and the contents of this phase of work were directly informed by the qualitative primary research described in section 1.3 above.

A summary of sample and approach, including details of the food security measure used, are outlined below. Please see the Technical Report for full methodological, sample, and analysis details plus full survey content.

1.4.1 Sample

Online research with 6175 participants was conducted between 14 and 28 January 2022 with adults aged 18+ across the four nations of the UK.

Within each nation, nationally representative quotas were set on age, gender, classification of Chief Wage Earner, as well as monitoring ethnicity and incidence of long-term chronic conditions. Data was then weighted to form a UK total representative of all nations in the right proportions.

1.4.2 Contents and approach

The online survey, lasting 20 minutes, was positioned as being on behalf of the FSA (in England, Wales and Northern Ireland) and FSS (in Scotland). The questionnaire collected information about people's socio-demographic situation, food shopping and food preparation behaviour, food security, and attitudes to a range of topics impacting food choices. The survey also explored people's concerns, areas of interest and priorities for Government, industry and the food regulators in the next three years.

1.4.3 Food security measure

Given the prevalence of public concerns around food prices and their impact on food choices identified in the qualitative stage, and with the input of the research's People Voice Advisory Board and academic validation from the Centre for Food Policy at City, University of London, a bespoke approach to food security was implemented in the quantitative stage. This approach built on the USDA food insecurity measure[43] but was designed to provide a comprehensive view of the range of food behaviours that people experience in relation to financial pressures.

Chapter 2: The UK public's wider context

Pressures, uncertainties and challenges shaping the public's food experiences, interests and concerns

Across this research, there was a sense that the UK public feel they are navigating an increasingly complex, challenging food system that often prioritises profit over people or planet. Their ability to consistently access and choose safe, healthy affordable food was under pressure, as was their ability to shop in line with their wider values. Most also did not trust or feel supported by either Government or industry, and information that should in theory support informed decision making often felt inaccessible or misleading.

In particular, financial pressure was causing increasing strain for many in the UK. Most reported that the price of food and, for many, limited food budgets,[44] often 'squeeze out' other high-priority and immediate considerations such as health and quality - let alone more systemic considerations around environment, fairness, welfare, etc. Many were experiencing reduced food security, in ways that tracked alongside existing social inequalities, and even higher-income people increasingly found their food choices shaped by financial concerns.

2.1 For the UK public, food choices often felt like 'an impossible juggle'

2.1.1 Core public interests driving food choices often conflicted in challenging ways

As evidenced consistently in previous FSA/FSS research,[45] the UK public felt that the core drivers of their food choices often exist in tension, which made it difficult to 'get it all right' in terms of their daily food choices. Conflicting food interests (price -

quality - health - convenience - values - taste - and so on) pulled them in different directions. For example:

- higher quality food was perceived as more expensive;
- food in the more convenient formats (such as semi-prepared, pre-prepared, ready to eat) was perceived as less healthy and/or safe;
- needs of one person in the household often conflicted with the needs of another;
- 'healthy' food felt more time-intensive to make, sometimes unrealistically so;
- figuring out an 'environmentally friendly' way to eat took more time and energy; etc.

The net result of 'juggling' these layered interests was that food choices felt pressured and complex for many. Most people wanted to meet as many needs as they could, but acknowledged that trying to reconcile multiple needs at once took time and energy. For example, people talked of the difficulty of weighing up the emotional, physical, financial and logistical impact of one option versus another; of investing more time and effort to 'stretch' food budgets by 'shopping around' across multiple suppliers; and of the emotional toll of feeling they were 'getting it wrong' despite their best efforts.

Those with caring responsibilities often felt the weight of this juggle particularly heavily, including parents (especially mothers, who were more likely to hold the domestic labour of meal planning and cooking) and those caring for adult dependents.

> "I have a fussy toddler who is very picky and clingy, so I can only cook once he's asleep. And I have a husband who has intolerances and although he does like to help with cooking, he creates more work for me. I know what I

want to do but I can't put it into practice. I stand at the kitchen sink and eat my food." F, 28, C1, London

2.1.2 The 'juggle' gets harder when there's more to balance or less 'give' in the system

People experienced this 'juggle' in very different ways depending on individual context. Some had more to balance, less time or emotional energy to 'spend' making choices, or smaller food budgets that restricted the options available. For example:

- parents were often balancing conflicting needs across the household (as above);
- people with pressured or unpredictable work schedules had less ability to plan ahead, invest in food preparation; or 'shop around' to help meet their needs;
- people with serious health issues often had a more urgent need for healthy food - but potentially more constraints on time or budgets' (see Ch. 6.3.3 for more detail);
- some more remote rural residents had more time cost involved in accessing food, or restricted access to choice because they were limited to a small number of local shops - meaning they had less 'flex' in terms of food options; and
- some neurodivergent participants talked about the emotional and physical 'costs' of visiting retailers and making food choices, limiting their decision 'bandwidth'.

"Supermarkets are a very stressful situation. To enable me to choose optimal healthy food, I need to see/feel/smell foods. This is difficult for me due to being on the [autistic] spectrum and time spent in the supermarket is limited.

Also unhealthy convenience foods are easily accessible." F, 40, C2, White British, Child 16+, LGBTQ+, Rural Wales

2.2 Profit and price pressures drove uncomfortable compromises

In the 'juggle' around food choices outlined above, food budgets and food price were often highly constraining factors. Those with more to spend had more 'flex' to use to make choices that met most or all of their needs; those with less to spend typically found their choices harder, and made more compromises around food.

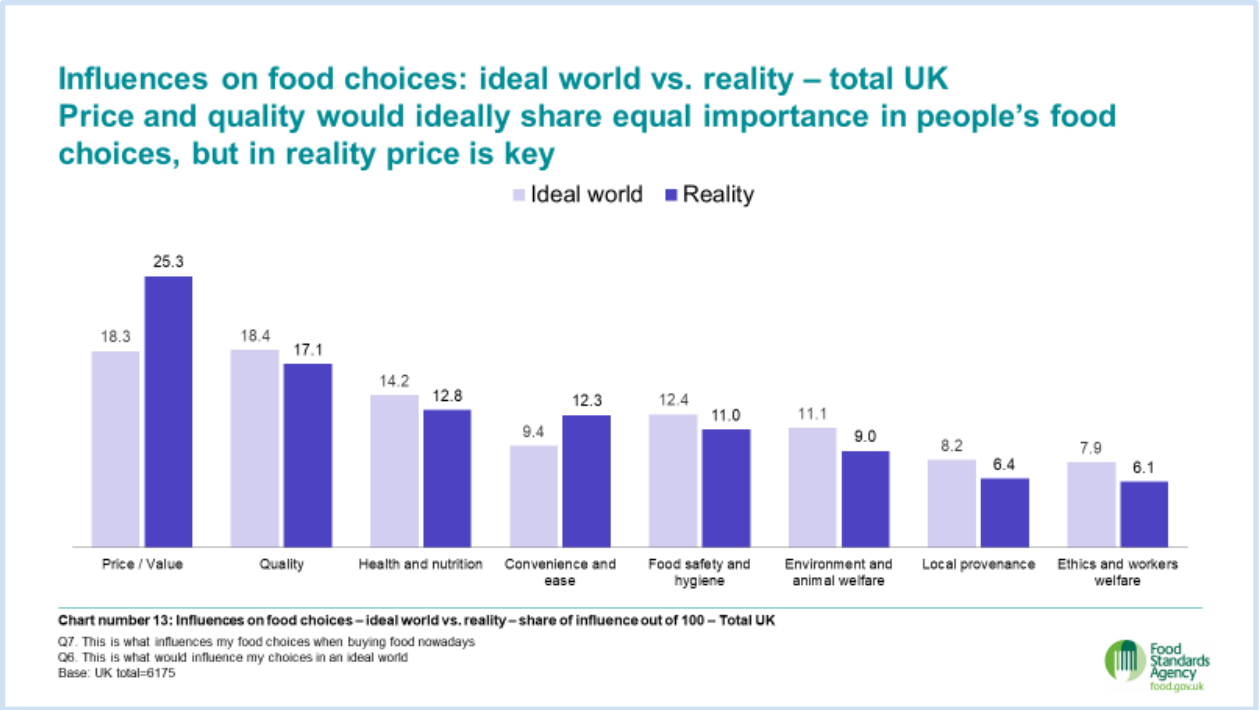
Most people in this research were experiencing financial constriction of their food choices in some way, with a sizable minority experiencing low food security (reduced quality, variety of desirability of diet for financial reasons) or very low food security (disrupted eating patterns or reduced food intake for financial reasons).[46] Food security levels tracked with wider established social inequalities in the UK.

2.2.1 Few felt able to make food choices that fully meet their needs and values

In the quantitative research, there was a clear disconnect between the role people wished price played in their choices, and the role it did play. Only 52% said they were able to afford the quality of food they want at all times. Although respondents wished that price and quality were fairly equal drivers in terms of their food choices, followed by health and nutrition, in actuality, food price trumped all other drivers.

Figure 1. Influences on food choices, ideal world vs. reality

This chart shows the average share of influence out of 100 for a range of factors - in terms of how people would choose foods in an ideal world, and the way they choose in reality.



2.2.2 Price pressures drive uncomfortable compromises for many

Many expressed deep frustration about the compromises they had to make in terms of food quality, health, nutrition or wider values as a result of limited budgets and/or financial pressure. Across age, gender, and income bands, it was clear that the food that people most valued in terms of health, and that felt most 'positive' in terms of wider impact on people and planet, generally felt unrealistically expensive.

> "All I want is to be able to feed myself and my family fresh healthy nourishing food that is sustainably produced without a huge negative impact on the planet. I can actually do this tomorrow but I will need to be on a six figure salary, but I'm not. So Waitrose and the Marks and Spencer food hall and the beautiful ruby and white butchers are a fantasy while I ponder the offerings of my local Iceland and Lidl." M, 47, D, British Asian, Children 8+, Bristol

Having to make consumer choices that felt out of line with their wider interests and values created a sense of "cognitive dissonance'[47] - a discomfort created by the gap

between what people said they wanted and valued versus what they actually bought and ate in practice. Health and nutrition interests in particular were often compromised when budgets tightened. For example, many lower income participants said they were often unable to afford even simple 'fresh' foods - which they wanted to prioritise in terms of health, safety and enjoyment, but more expensive than more processed options.

> "I wish I could afford to shop just purely fresh food items but the difference in cost in just the ingredients to make a lasagna for a family of 4 to buy an extra large family size prepared, convenience one is a lot of money. This is just one example. If I bought meat and vegetables to cook fresh dinners for 7 days a week it would cost me double in a weekly shopping bill." F, 41, D, White/Caribbean, Children 8+, Asthma and physical disability, 3 part-time jobs, Manchester

Sometimes, this feeling of being unable to afford fresh ingredients for cooking also resulted in reduced engagement and connection to cultural heritage or community, for example for minority ethnic participants who felt 'priced out' of cooking cultural favourites.

2.2.3 Financial pressures increasingly shaped food behaviour of 'more secure' people

Budget-driven compromises were not just affecting those who were financially 'worse off.' Only 35% of respondents reported their choices had not been affected at all by financial worries - with a majority (65%) modifying food behaviours as a result of financial concerns.[48] For example, higher income people often reported changing behaviours such as switching to cheaper brands or using budget retailers instead of their regular supermarket.

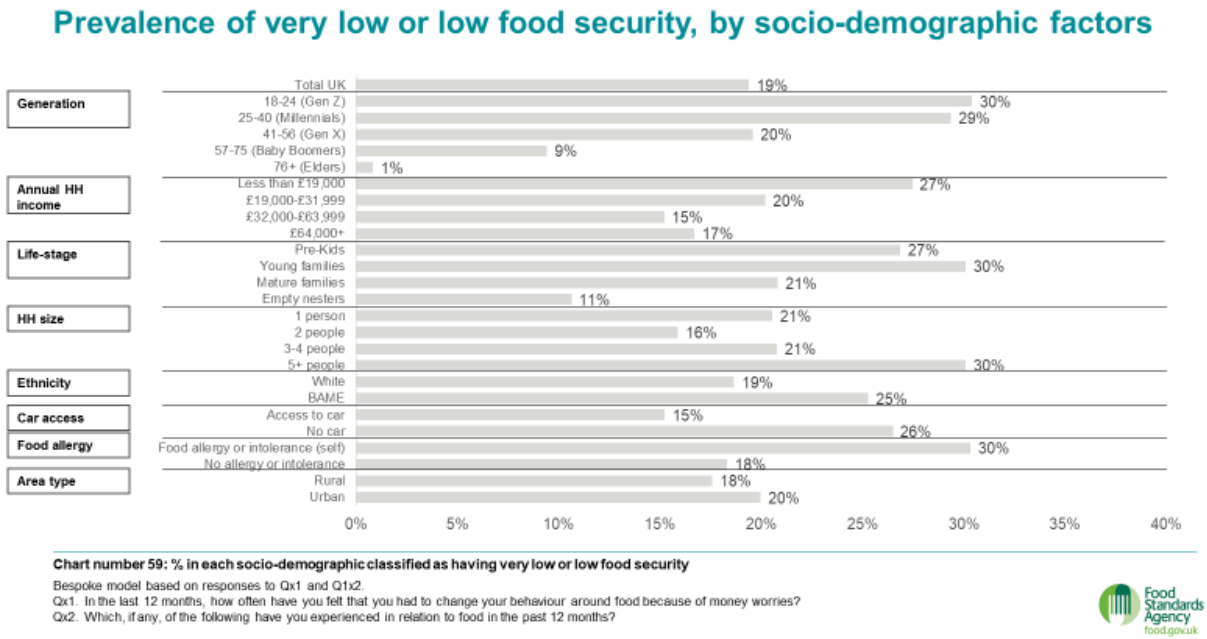
Researchers also noted that higher-income participants in the qualitative research often 'felt' much like the lower income groups in previous years in terms of the tone and content of discussions. For example, whereas discussions among financially 'better off' participants had often focused on things like the importance of good quality food and the benefits of 'premium' products, people on the same incomes were now sharing ideas for cutting food spend and 'getting more for less.'

2.3 Low food security drives compromises on basic sufficiency for many

It was not the aim of this research to provide robust estimates of food security levels for the UK population; readers particularly interested in this space may find tracking data provided by the FSA elsewhere useful.[49] However, our data does clearly show that many in the UK reported behaviours in line with low or very low food security.

Overall, 28% reported that financial concerns were reduced quality, variety or desirability of diet - or resulting in disrupted eating patterns or reduced food intake (for example skipping meals when hungry for financial reasons). Levels of very low or low food security were slightly (but statistically significantly) higher for people on low incomes, younger people, larger households, BAME respondents, people who were unemployed, people and people with food allergies or intolerances.

Figure 2. Prevalence of very low/low food security, by socio-demographic factors



In particular, age differences in food security were stark, with 'Gen X' representing a distinct general 'dividing line' in terms of generational food security levels. Those from 'Boomer' and above generations reported much higher levels of food security; for 'Millennials' and below, more people reported low or very low food security behaviours than not.

2.3.1 Low or very low food security has serious consequences on health and sufficiency

As explored in detail in previous FSA research on the lived experience of food insecurity,[50] negative impacts on people's health, wellbeing and basic sufficiency were serious and multiple. Among those classified as having very low or low food security:[51] [52]

- 52% said they had been unable to eat healthy balanced meals in the past 12 months (vs. 4% for those food secure[53]).
- 43% had skipped meals because there was not enough money for food (vs. 1% for those food secure).

- 40% said they had been unable to buy food due to lack of money (vs. 1% for those food secure).

"Fresh" (minimally processed) meat and produce were often amongst the first 'luxuries' to go when budgets tightened, which left many to worry about the impact of their food choices on health. People also worried that the food they could afford was low-quality and below minimum acceptable standard; tasting bad, nutritionally suspect, and low-enjoyment.

2.4 Covid pressures and supply shortages increased perceived precarity

Qualitatively, supply issues triggering food shortages at the start of the pandemic had led to a realisation among the public that food choice cannot be taken for granted - even among the more affluent groups in society. This sense of choice being precarious was further compounded by more recent food shortages linked to changes in import legislation and staff shortages in the supply chain (for instance lorry drivers).

As well as restricting the choices available, shortages often triggered rapid price rises even on basic or 'every day' food items, restricting options further for many people, especially those on tight budgets or in more rural areas.

> "I needed some green veg to go with my dinner and tender stem broccoli was £2, it's normally £1.50! I've noticed some products disappear from the shelves but I find alternatives. The only thing I'm missing out on is crab, which is incredible considering it's local to me… I know which fishing boat it comes off, and I see that fishing boat in the harbour all the time and I'm thinking…where is the crab?!" M, 58, C2, White British, Suburban Scotland

2.5 Trust was low that public interests will be protected in this space

Adding to perceived pressures around food choices was a sense that those who shape the UK food system do not act in the public interest, with fairly low trust in both Government and food businesses.

For most, there was an assumption that food businesses were highly influential in the food system - and that industry prioritised its own interests over people (both consumers and food system workers), animals and planet.

- 75% of survey respondents agreed that 'profit has become more important to the food industry than people's needs' - a perception that spanned social groups
- Only 39% believed that 'most big food companies treat their workers fairly'.
- Just 19% trusted food manufacturers or brands as information sources about food (Note - this is not the same as the degree of trust in FSA).

There was a widespread sense of public cynicism about whether 'Government' acted as an effective counterbalance to corporate interests in the food system. Trust in Government was low, with only 32% of people reporting they trusted the Government to act in their best interests generally. When it came to information about food specifically:

- Only 14% chose the UK Government, ministers and departments as trusted sources of information[54].
- Only 11% chose local authorities as trusted sources (consistent across all nations).

Trust amongst devolved nations' citizens was slightly higher, with 21% on average saying they trusted their Government for information about food: 18% in Wales, 15%

in Northern Ireland, 24% in Scotland. *Note that trust in the (devolved) Government was significantly higher in Scotland than in other nations.*[55] [56]

2.6 Implications for policy-makers and decision-makers

The wider contextual challenges outlined in this chapter are largely beyond the scope of any one body to address. Food poverty and social inequality can't be solved by a single Department or simple policy change; they are systemic challenges requiring collaborative, sustained action.

However, this report details people's experiences and needs around these wider tensions and concerns because the public wanted their worries to be heard. Policy-makers must account for these *across all areas of action they take on the public's behalf.* Acknowledging these challenges and incorporating them in planning and action is critical to representing and protecting the public interest around food.

It is also important to register that the widespread frustration and perceived lack of agency experienced by the public seemed to be contributing to a sense of unease about the UK food system as a whole. There was a sense from many that as our food systems evolved, they had become more global, more profit-driven, more influenced by big food businesses, and more focused on processed food - and that along the way we made natural, fresh, healthy food less accessible.

> "When did it happen that buying good, local food became something that only wealthy people could afford - when did that become artisanal rather than just the way that we eat? Why is it that in our system it's only the ultra processed stuff in boxes that you can afford, and the only stuff that's ever on sale?" - People's Voice Board member

Chapter 3: Equitable access to safe, healthy, affordable food

In this chapter, we explore a public desire for change that stretched across a range of 'wider interests': the desire for everyone to be able to access safe, healthy, affordable food. There was a strong belief that everyone 'should' have access to this, but concerns about rising food prices made many fear that the future of UK food would likely be more unequal.

We explore public views in this area, which were seen as influencing all other 'wider interests' and concerns (for example food safety, hygiene and standards; health and nutrition; and ethics and environment issues). Each of these specific 'wider interest' areas are then explored in depth in the Chapters that follow.

3.1 The public wanted everyone to have access to positive food choices

In line with recent evidence from the FSA /FSS and others[57], the majority of people in this research felt that everyone in the UK should have access to healthy, good quality nutritious food. People believed that regardless of personal circumstances, people should be able to eat food that keeps them in good health and able to function - and were frustrated that a 'well off' nation like the UK was far from realising this ideal.

> "I just believe that having good quality food for a good value should not depend on your pocket. Good quality food should be accessible to everyone at an affordable price." M, 69, B, White British, Household health issues, Bristol

When people were asked to outline positive food futures they expressed strong views that the UK should aim for more equitable access to healthy, affordable food.

> "'I'd really like to think that in five years' time, everybody, regardless of your background and economic status will be in a position to feed their family. You know, it's the very basics of human society. And I'd like to think that means, in real terms, I don't mean, you know, being able to buy pasta and having the same meal five out of seven nights, and the odd treat here and there. I mean actual good quality food that's affordable and convenient and people don't feel like they're begging simply to get access to it." M, 54, C1, White British, Scotland

Recent media coverage around inequalities in food access seemed influential in shaping these views, with the 'Free School Meals' campaign led by Marcus Rashford and partners (such as the Food Foundation) being particularly powerful. The idea of children going hungry during a public health crisis (Covid 19) proved highly evocative, as had social media coverage of 'sub-par' free school meals supplied by contracted providers. The strength of public opinion in this space had likely also been affected by personal experience. Given the number of people experiencing lowering food security themselves or feeling under pressure around food prices,[58] the fragility of food security was increasingly becoming a tangible reality in the UK public's daily lives rather than a point of abstract ethics.

> "What that lad Marcus Rashford did, like kids are not being fed, are in poverty and being starved in their own homes. Why did it take a footballer to do what the Government should have done?" Workshop Participant: Parent, Children under 7, Lower SEG

3.2 However, this aspiration seemed increasingly out of reach - and rising food prices proved a major 'flashpoint' of public concern

Despite the optimistic aspirations outlined above, fears about the future were prevalent. The public expressed widespread concern that their agency, choice and security around food will face increasing pressure in the future. 20% of survey respondents spontaneously raised the increasing price of food as something that worries them for the future - this far outweighs any other concern in terms of top of mind salience for the public. When asked to select from a list of topics (derived from the qualitative stage) 64% chose food poverty and inequality as a major concern over the next 3 years, with many also expressing this concern spontaneously in qualitative discussions:

> "Not for myself, but I worry about widespread food poverty for people caused by low wages and inflationary pressures, resulting in poorer diets and nutrition." Quantitative survey participant, Male, Upper SEG, Empty-nester, England.

In terms of prompted concerns over the future of food in the UK, affordability of food generally, cost of healthy food and inequality of access to food were dominant topics groups. Concern was higher amongst more pressured and/or marginalised public groups.

Future food concerns	**Total sample**	**Long term health conditions**	**Women**	**Less food secure**[59]	**BAME groups**
The price of food	76%	78%	80%	85%	79%
The cost of healthy food	68%	72%	74%	82%	75%
Food poverty or inequality	64%	67%	69%	77%	70%

For some lower income participants, price concerns were so dominant as to make discussion of other topics almost impossible. Several qualitative sessions with lower-income participants needed to be paused or stopped for safeguarding reasons in response to visible participant distress.

> "I worry about the affordability of buying food - with inflation and no pay rises for workers. Not being able to feed my family properly. Having to rely on rubbish unhealthy food which could compromise our health". Quantitative survey participant, Female, Lower SEG, Young family, England

Although people on higher incomes had more agency, they too have experienced rising costs and other issues that restricted choice (like food shortages). This seemed to be contributing to a sense of unease about whether their choice and agency would be protected in the future - with this realisation serving as a source of deep concern for many. Many who felt 'safe' themselves also expressed worries about widening social inequalities and the impact on UK society as a whole.

> "The price of food at the minute is becoming scary. My wages are not increasing as quickly as the price. I feel the same variety is not available to me post Brexit and availability of these things in the future hangs in the balance." F, 42, B, White British, Child 16+, Northern Ireland

3.3 Representing and protecting people's interests around equitable access to safe, healthy, affordable food

3.3.1 Future focus

The public wanted their ability to access safe, healthy, affordable food to be protected. They saw this as a priority area for Government and regulator

intervention; they did not believe food businesses would prioritise public interests without external pressure.

Among the UK public, 50% saw access to healthy food products at affordable prices as important to them for the future (34 % cited this as a priority area). Furthermore, 41% mentioned access to good quality, low priced-food that is not over-processed (24 % cited this as a priority area). As reported above, this is set in a context of wider concern over the price of food in general: 76% of the total sample indicated that the price of food was a concern for the future; 64% cited concerns over food poverty and inequality when considering the next three years ahead.

However, qualitative evidence suggested that there was real cynicism about whether Government and regulators could or would actually take action in this space, which may have influenced how respondents chose which actions they would like to be prioritised.

3.3.2 Action areas for the regulator (working with partners)[60]

Overall, the public wanted the regulator to work with partners in order to deliver genuine choices for them in terms of quality, healthy and affordable options. The number one priority participants wanted to see actioned was to ensure that low-priced foods meet a good baseline level of quality, and conversely, that good quality food (including local and fresh produce) was also affordable, The public also wanted to see action around ensuring that promotions include fresh produce and fresh foods, not just processed foods.

In addition, there was greater emphasis in Scotland on wanting the regulator and its partners to provide healthy nutritious meals for children and in public sector care settings.

Whilst activities in this space may not fall directly within the regulator's remit, the pressures on the public described in this chapter, not least price pressures and increasing food insecurity, are informing the public's desire to see access to affordable healthy nutrition to be safeguarded in some form.

Chapter 4: Food Safety, Hygiene and Standards

The UK public clearly cared about the safety, hygiene and standards of the food they eat and wanted to see their interests in this space protected. Most believed that the food they eat is safe and hygienically handled, and many expressed a high degree of pride in UK food standards. Experiences were less positive and trust was lower amongst lower income and less food secure participants.

However, many worried about the maintenance of our standards in the future (post-Brexit) and about the long-term safety of things 'added to food' like hormones, pesticides and additives. Allergen management and information was also an area of concern for many.

Participants were eager to see a 'strong' regulator who represents and protects their interests in this space - for example, by clearly prioritising people over profit. They were eager to see the safety, hygiene and standards of the food we eat in the UK maintained and-or strengthened in future, particularly in terms of protecting standards post-Brexit.

4.1 Public interest in hygiene, safety and standards

4.1.1 Hygiene, safety and standards remain core interests for the UK public

Food safety, hygiene and standards were all topics that clearly mattered to participants, viewed as foundational food issues that affect everyone in the UK; no-one wishes to have unsafe, unhygienic or low-standard food. In the qualitative research, this was ranked as the top topic area in terms of public priorities - and was also consistently chosen by participants as a priority topic for discussion in the group workshops.

In line with previous evidence[61] people in this research tended to conflate questions of 'safety,' 'hygiene' and 'standards' - and their responses to one or more of these topics were often deeply emotive.

On a personal level, participants spoke about the importance of avoiding food poisoning and ill health; their responsibilities to keep children or loved ones safe; managing allergen exposure risk, and so on. As discussed elsewhere, for some participants this topic also encompassed concerns around 'things added to food' such as pesticides or hormones (see Ch 4.2.3), or the long-term sustainability and environmental impact of our food systems, especially around animal welfare standards (see Ch 4.2.4).

> "I find it hard sometimes determining what is healthy as I am sometimes cautious of what is in the food we consume and if everything they say is in the food is actually there. We have to trust farmers and the people responsible for sourcing the food to ensure that they are following all protocols and procedures in place to help guarantee this." - M, 33, C1, White British, London

For participants with health issues, disabilities, and/or allergies food safety often felt particularly urgent. For example, some participants noted that food poisoning or allergen exposure might have serious and/or long-term consequences - reducing their ability to work, or worsening sometimes already precarious health.

> "My main concern is the lack of information on the effect on people like myself who have allergies to most vegetables almost being forced to eat fake meat products". Quantitative survey participant, Male, Higher SEG, Mature family, Northern Ireland.

4.1.2 Covid and Brexit may have heightened public consideration of this space

The Covid-19 pandemic seemed to have heightened public awareness of safety and hygiene. There was a sense that the pandemic had made many participants more conscious about hygiene in relation to food preparation, packaging and delivery. Notably, in contrast to FSA research conducted in early 2020,[62] there was no sense that people thought the pandemic or associated financial pressures had resulted in 'slipping standards' for food businesses.

> "The whole culture at the minute throughout the UK, and the whole world really, is about hygiene. With the whole COVID thing, I think we've become very paranoid." Workshop Participant: F, Parent, Children under 6, Higher SEG

Brexit media discussion and lived experience of the impact of Brexit on food transport and availability also seemed to have driven more consideration of topics such as international food standards or global supply chains, with many participants in the qualitative research spontaneously raising examples of 'lower' standards elsewhere. For example, participants referenced concerns around 'chlorinated chicken' or 'hormone injected beef'. These were much lower profile topics in FSA research discussions in earlier years, often requiring substantial education and prompting to enable discussion.

> "When you compare EU standards to American standards, the EU on the face of it would appear to be significantly higher. I would worry that after Brexit our Government would ditch the EU regulations in favour of a less robust process that generates more revenue for the economy." F, 42, B, White British, Child 16+, Northern Ireland

4.1.3 However, safety, hygiene and standards were not core decision making drivers

For most survey respondents, safety and hygiene considerations did not play a big role in everyday food purchasing decisions. We measured this quantitatively by asking survey participants to consider 8 major drivers of choice[63] - identified in the qualitative stage - and allocate 100 points however they wanted, to show the relative share of influence of each factor on their day to day food choices, In terms of day to day decisions, health and safety considerations attracted on average 11 points out of 100, meaning that its weight on the decision, or share of influence, was 11%. This is significantly below factors of: price (25%), quality (17%), and marginally below health and nutrition (13%) and convenience (12%).

As explored below, this was likely because of people's assumptions that the food they eat is generally safe, hygienically handled, and governed by strong standards. They appreciated being able to trust that their interests are represented in this space and value food safety, but did not think much about it day-to-day. In effect, food safety, hygiene and standards were quite literally 'hygiene factors' in their day-to-day food choices.

4.2 The general public view on current food safety, hygiene and standards

In general, in line with previous research,[64] public experiences around UK food safety, hygiene and standards were positive, and trust in the safety of the food they eat was high. However, there were some common areas of concern, centring around enforcement, the long-term safety of more heavily processed foods, and allergens regulation and information provision.

4.2.1 Most have high confidence in UK food safety, hygiene and standards

In general, the public believed that the food they eat is governed by high standards, handled and stored hygienically, and safe to eat. 78%[65] trusted that the places where they eat or buy from are handling food safely and hygienically. 79% trusted that the foods sold in shops are made and stored according to good safety standards.[66]

In line with previous evidence,[67] qualitative discussions suggested that this high consumer confidence was rooted in generally positive personal food experiences, supported by signals that 'someone' (the FSA/FSS and its partners) was looking after public interests in this space. For example, most felt that:

- Hygiene ratings showed safety and hygiene standards are regulated and enforced
- Supermarket shopping and most restaurant experiences were safe and hygienic.
- Sell-by dates show 'someone' wants to help keep people safe.

Likely furthered by Brexit media discussions (as detailed earlier), UK food standards were sometimes a source of visible pride. For example, when one Scottish participant commented, *"Our food safety and hygiene standards are 'world class,'"* this was met with fast agreement from the rest of the group.

4.2.2 Enforcement was a concern for some: 'are regulators upholding the rules?'

Despite the public's general trust and confidence in this space, they did express some concerns - often about whether the 'signals' they saw that 'someone' was looking after their interests were actually supported in practice. For example, participants raised questions around:

- Why businesses with low safety/hygiene ratings were allowed to stay open
- Whether 'bad businesses' were 'really' being made to improve practice
- Why supermarkets were allowed to send short-dated food to online shoppers
- The safety and hygiene practices of smaller or independent businesses.

> "I've had bad experiences with some farmers' markets and small stores where they aren't storing the food properly. It's easier to trust supermarkets in keeping food safely and hygienically, but I don't want to shop there." F, 38, B, Scotland

When asked about these concerns, participants' discussions often centred around low levels of trust that 'Government' had enough power - and/or enough will - to enforce rules and penalise poor practice. These discussions often aligned with wider concerns about who 'Government really cared about protecting': the public or businesses. This was enforced by the survey results, where the vast majority of respondents (95%) wanted the Government to take action on at least one issue related to food.

> "These big food companies have way too much control over what happens. They kind of run it and there's definitely backhanders, like the big supermarkets give the Government backhanders and things get swept under the carpet and unfortunately, that's the world we live in. It has got to be stopped." Workshop Participant: Parent, Children 8+, Lower SEG

4.2.3 Many worried about the safety of ultra processed foods and wanted transparency

In line with previous FSA and wider evidence[68], a large proportion of the UK public was worried about the safety of things 'added to' the food they eat, and/or highly processed foods. In the context of food safety and standards, 47% of respondents

stated they would like to see regulatory action in order to 'reduce things added in the food process for example E-numbers, preservatives'.

Concerns centred around the long-term health and safety implications of things like additives, preservatives, pesticides, hormones, chemicals, fertilisers, and so on. Many worried that although these might not individually present any detectable short-term harm, they have more long-term and/or collective impact - for example via increased risks of cancer or other health harms.

> "They're having to wear hazmat suits to spray fish with all these deadly chemicals. Is there a way they can regulate that? Can they tell us if it's safe to eat? Because I don't believe it is... why would you need a hazmat suit?"
> Workshop Participant: Parent, Children under 8, Higher SEG

These concerns seemed to be exacerbated by a feeling that exposure to things 'added to' food was out of their control on multiple levels. Fresh, organic, 'unprocessed' or minimally processed food was too expensive and/or time consuming to be a realistic choice for many. 40% of respondents said they 'often rely on quick to prepare convenience foods (ready meals, frozen pizza, fish fingers, nuggets etc.)' and 25% agreed that heavily processed foods were often the only option available to them.

Participants also expressed frustration about a perceived lack of transparency about exactly 'what is in our food'. Information on labels (for instance about additives or preservatives) felt hard to understand; looking up information about things like pesticide or hormone use was challenging; many felt uncertain that they could find 'the truth' regardless. In responding to this statement, "I find it difficult to understand what a product contains", only 37% disagreed. This suggests that for 63%, there was a degree of difficulty in understanding what is in the food that people buy. For many,

this sense that the food system has 'opaque' and 'black box' elements contributed to concerns about whether public interests were being adequately protected.

> "It is virtually impossible to get a clear picture of what is allowed to be labelled as food - so many additives and fillers which cannot be described as food are allowed." F, C1, White British, Scotland

Qualitative participants also voiced frustration about the fact that, since this information is not easily traceable, no one can be held accountable. As elsewhere, concerns felt amplified for those that had lower general trust in business, and in Government/regulators to prioritise public over business interests.

> "I am worried that food in the UK will become filled with other substances that are bad for our health and everyone will get sick". Quantitative survey participant, Male, C1/C2, No Children, England

4.2.4 People saw animal welfare as a key part of food safety and hygiene

Animal welfare had a fairly high mention rate amongst participants in the qualitative research as a concern area in food, with 60% of survey respondents selecting the treatment of animals in the food chain as a major concern. It seemed that for most people, this was raised primarily in relation to questions of food trust, safety and transparency than in terms of ethics or animal rights per se. As per the discussion around processed food, above, there was a sense that things 'done to' animals used for food production might have a range of negative impacts - including on long-term human health.

Ethical (not 'safety') concerns around animal welfare are discussed in more depth in Ch 5.2.6.

4.2.5 More support was wanted for allergen information, regulation and enforcement

Ensuring protection for people with allergies and hypersensitivities also emerged as a substantive area of concern, particularly, but not only, for those directly affected.

In line with recent FSA research in this area,[69] many participants in the qualitative research reported they found it difficult to access the information they needed to make safe, informed decisions about allergenic ingredients and/or cross-contamination risks. Whether eating out, food shopping or preparing food at home, participants often found allergen information hard to access, inconsistent and/or unclear.

For example, participants raised examples of restaurant staff making people with allergies feel unwelcome or not being able to distinguish critical allergen information from wider 'lifestyle choice' ingredient notices. Precautionary allergen labelling such as 'may contain' notices were reported as particularly confusing,

> "['May contain'] is a blanket term that appears on a huge number of food products that would never otherwise contain that. And it's just basically manufacturers covering their own backs." Workshop Participant: Pre-family, Higher SEG

These qualitative reports were supported by the survey data. Around 9% of respondents reported living with food allergies or hypersensitivities. A much higher percentage (39%) of respondents agreed that they were 'concerned that the way allergens are labelled on food products is unclear.' 'Enforcing clearer labelling of food ingredients and allergens' was also cited by 43% of respondents as a priority action area for regulators.

These clarity and access issues, coupled with a perception that food businesses seemed not to take people's allergen concerns seriously, had the effect of making people feel less safe, unsupported, and less trusting of food businesses and regulation alike. In discussions, there was a palpable sense of frustration from some participants.

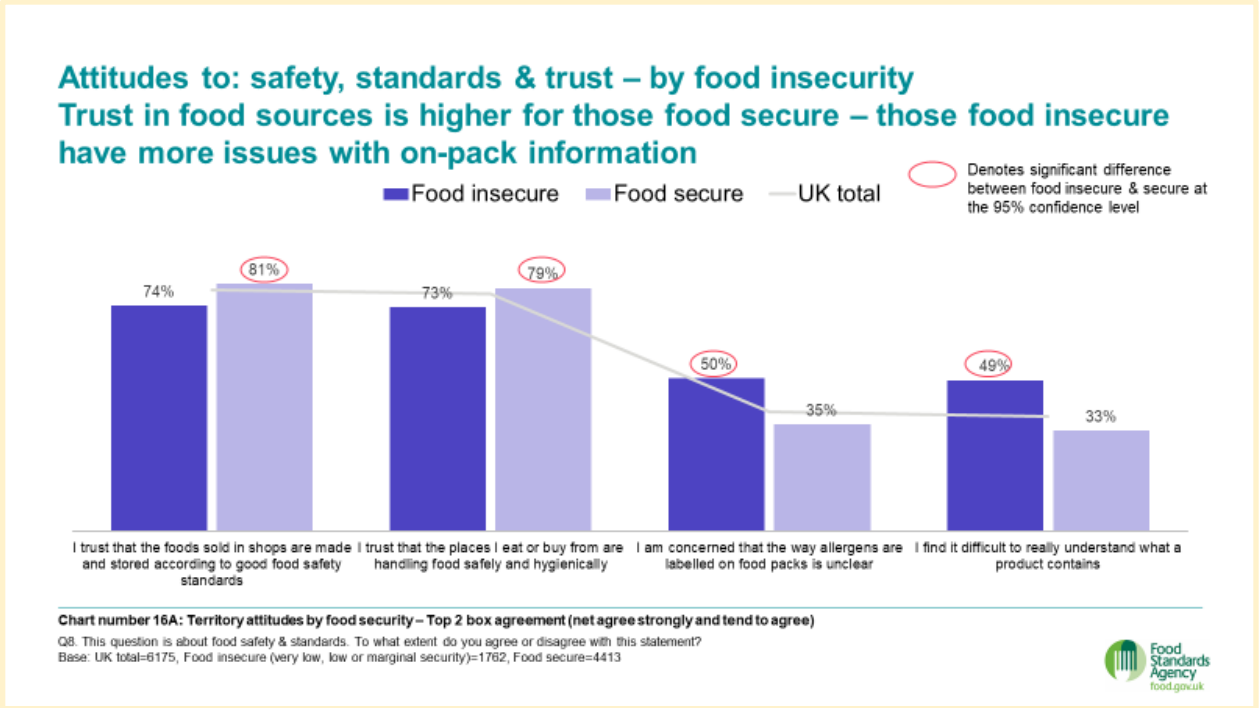
> "This issue is interesting and matters to me because.... I cannot afford to be ill as I am a carer to my wife. Even if I wasn't then I would be interested in food safety for my and my family's health." M, 61, B, White British, Suburban Manchester

4.3 Audience differences in views on food safety, hygiene and standards

4.3.1 Lower income people have lower trust and higher levels of concern

Overall, those living on lower incomes or with food insecurity had more negative experiences with regard to trusting the food they ate was safe and hygienic, including around minimising risk of exposure to allergens.

Figure 3. Attitudes to: safety, standards & trust - by food insecurity groups



81% of food secure respondents agreed that the foods sold in shops are made and stored according to good safety standards, falling to 74% of those food insecure. Similarly, 79% of food secure respondents agreed that the places they ate or bought food from were handling food safely and hygienically, falling to 73% for those food insecure. These gaps in agreement levels between people who are secure and those who are less secure are statistically significant.

4.3.2 Lower income people feel more exposed to risk because of price pressure

Qualitative discussions suggested that this lower sense of trust was driven by increased 'exposure' to poor business practice for lower income participants, plus wider concern about the safety of 'cheap foods'. As explored extensively in Chapter 2.2, there was a feeling across the participants in the qualitative research that buying cheaper foods meant compromising on food quality in ways that might impact immediate safety and/or long term health.

> "I feel I have to accept lower safety standards because of how much things cost so I'm exposed to more risk, like with cheaper meat and leaking blood." F, 72, C, Mixed Ethnicity, Food intolerances and Amyloidosis, Bristol

Many expressed concerns about whether supermarkets were storing items such as budget ready meals, sandwiches and frozen foods as safely as other more 'premium' food items. This group also reported taking more risks and/or having less 'room for error' in terms of food safety. For example, lower income participants reported sometimes buying food and freezing food on the day of its 'use by' date[70]. Once that food was cooked, it might potentially be cooked and eaten over several meals during the week.

These participants thus felt more conscious of and concerned about how safely and hygienically food had been treated before they took it home. 'Bending the rules' might be ok if food was 'safe' when they bought it, but less so if food was already 'risky' because of poor business practice prior to sale.

> "I wonder about when it was frozen, how many times, and whether it defrosted on my long shopping trip and how this impacts my ability to refreeze it. Also different places have different use by dates, so Lidl will be 6 days and others will be 3 days." F, 36, C2, White Irish, Children under 8, Suburban Belfast

Food insecure participants[71] were statistically significantly more likely to feel 'concerned that the way allergens are labelled on food packs is unclear' than food secure participants (50% agreement[72] compared to 35% among those classified as food secure).

In addition, those with low or very low food security are more likely to face these food safety and hygiene dilemmas in a context of poorer health: 34% of those

classified as very low or low security had a long-term chronic or mobility issue, allergy, or health conditions; this is significantly higher than for those in marginal or secure food situations (27%).

4.4 The public worry about whether standards will be maintained in future

The public's worries in this space centred around whether the standards food is held to in the UK will change as supply chains and trade agreements evolve post-Brexit. 50% of survey respondents reported concern about food standards post-Brexit. As previously mentioned, media coverage of post-Brexit trade deals and standards seemed to have been influential in shaping views. For some, concerns around increasing travel times for food to reach the shelves also played a role; thinking about trade deals seemed to have increased consideration of 'food miles', transport and 'freshness..

> "Brexit is a real concern for me as I think the Government and American food giants will use this as an excuse to reduce the food quality in this country." M, 41, C1, White British, Child 8+, Manchester

> "I mean since leaving the EU and lockdown. I feel like food is taking longer to reach the shops so it's having an impact on shelf life. Meaning if you shop weekly or monthly you don't have as long with fresh produce like you once did." F, 37, C2, Black British, Children 8+, Bristol

Concerns over less stringent food safety standards post-Brexit were significantly higher amongst women, people under 45, and ethnic minorities. The reason for this is uncertain, although some conjectures can be made from the wider evidence about potential drivers. Across the research, these groups tended to express more concerns and worry overall, potentially driven by the sense of more 'pressure'

around food (as explored in Ch 2.2). These demographic variables are also associated with risk factors in terms of lower food security - aligning with the increased sense of risk exposure in terms of food safety, as above.

4.5 Summary: representing and protecting people's interests around food hygiene, safety and standards.

4.5.1 Future focus

Participants in the qualitative research were keen to ensure that food safety, hygiene and wider standards 'don't slip' or are strengthened as the global landscape changes. Quantitatively, 'high safety and hygiene standards' was respondents' fourth-highest rated topic in terms of UK priorities over the next 3 years, chosen by 44% of respondents - after 'reducing food waste', 'healthy food at affordable prices' and 'supporting British farmers/producers'.

> "UK Government and policymakers...they should be ensuring that food safety is maintained, these standards in the UK are high so it is important to keep it this way and not end up putting fake hormones into our meat and dairy products, or use dangerous pesticides or flavourings and preservatives!!!" F, 37, C1, White British, Children under 8, Rural Ireland

As above, key concern areas centred around ensuring:

- standards are maintained or strengthened post-Brexit
- strong UK food business safety and hygiene via strong regulator enforcement
- transparent guidance and information about long-term safety of processed foods
- strong animal welfare standards in the food chain.

> "I'm nervous about the consequences of leaving the EU. Less good food will be imported in future. Further this Government may well sacrifice food

standards in reaching trade deals with other countries, tho' this will take longer. It also is likely to reduce what it's prepared to pay for regulation and inspection - see the current furore about the Environment Agency." Quantitative survey participant, Male, Upper SEG, Empty Nester, England.

4.5.2 Action areas for the regulator[73]

When asked to rank their priorities for regulator action with regard to food safety, standards and transparency (choosing a maximum of 3 from a list of 6), respondent's top-3 desired actions were as follows:

- Hold companies to account in a visible way (50% mentions)
- Take action to reduce 'things' added in the food process like e-numbers or preservatives (47% mentions)
- Enforce clearer labelling of food ingredients and allergens (43% mentions).

Chapter 5: Ethics, environment and systems

Impact on people, animals, country and planet

In this chapter, we discuss wider food topics that many in the public care about, but often don't feel they can prioritise on a personal, day-to-day level. In the context of a deep gap between people's interest and their perceived agency, the public were eager for decision-makers to take action and drive positive, sustainable food futures.

There was widespread public engagement and worry about environmental issues, including around how our food systems can help or harm the planet, and how we can minimise and/or adapt to the increasing threats of climate change. However, people reported a variety of barriers to consumer engagement and action in this space, ranging from price pressure to information availability to a sense of overwhelm or eco-anxiety.

More widely, there was evidence of public interest in more 'systemic' food system topics, linked for many with concerns around the future of British agriculture. There was strong engagement with questions of how to support and protect British farmers and UK agriculture post-Brexit, and widespread interest around questions of what more 'local' agricultural systems could look like in the UK. Specific topics around worker rights and agricultural innovation were less common but potentially emergent interests.

5.1 Public interest and engagement around food ethics and environment

5.1.1. Food ethics and environmental considerations intertwined with other interests

Participants tended to express needs and interests around ethical and/or environmental topics as connected to other interests and concerns discussed

previously. What was assumed to be bad for the planet was often assumed also bad for people at multiple levels. In the long term, this was due to the negative impacts of intensive or mass production food systems on climate change and therefore on the human population, whilst in the short term, due to mass-market food production impacting public health and wellbeing.

For example, participants tended to associate a number of negative issues with more processed food: less ethical and environmentally friendly food production practices; more use of additives, pesticides and hormones; reduced 'quality' and 'safety' for consumers; potentially poorer worker treatment; lower animal welfare; and so on.

> "I am concerned about the environment and how some foods could affect the way we eat. I prefer to eat meat that is organically produced with no added preservatives and animal welfare is taken into consideration." Quantitative survey participant, Female, Higher SEG, Children 16+, England.

Interests in this space were often two-fold: the public were eager to see food systems that feel fair and positive for people and the planet in general, and they also often had concerns about how 'unfair', 'unethical' or 'unsustainable' practices affect them now.

5.1.2 The public were highly interested in the future of British agriculture

Many in this research were keen to discuss systemic food system topics which in previous research have been areas that raised interest only among a minority. Qualitatively, spontaneous reference to what have previously been seen as 'abstract' food topics were notably higher than in previous FSA research, and spread amongst a broader spectrum of public audiences.

When asked about their concerns for the future of food, respondents in the quantitative stage spontaneously mentioned topics such as British farming and imports (7%), Brexit (5%) and animal welfare (6%). These topics were often interlinked in people's minds. The concerns participants raised in this space are explored in detail in the sections to follow.

> "[I worry about] the availability of some foods due to supply chain issues. We [in the UK] don't grow as much of our own anymore, so there is an extra concern about the 'carbon footprint' of our food. The meat/dairy industry is a concern regarding welfare and environment." Quantitative survey participant, Male, C1/C2, No children, Scotland

5.1.3 Many aspired to a more eco-friendly diet, but there were widespread barriers to public action and engagement

Regardless of their personal interest levels, most people in this research prioritised more immediate, personal interests and needs in their day-to-day decisions. For example, 54% of survey respondents reported they would like to have a more eco-friendly diet - but only 28% said that they tended to look for food that was 'organic or 100% natural' (assumed by participants in the qualitative research to be more 'eco-friendly'). 46% reported being prepared to pay more for food that is 'environmentally-friendly' or made to high welfare standards.[74]

Barriers described by participants included the need to prioritise other decision-making factors (especially price); a lack of easily accessible, trusted information; and feeling that the problem was 'too big' for individual consumer decisions to make a difference. It was striking that 'tangible' environmental issues like food and packaging waste often acted as flashpoints for engagement, likely in part because they felt more contained and feasible to tackle.

> "I think these topics do matter to ensure that we are treating the planet respectfully, however I would be lying if I said this was my main focus whilst shopping." M, 27, C2, Scotland

5.1.4 The public had a wider interest of the mutual impact between our food system and the environment in the long-term

The public sees a relationship where the food system impacts on the environment, and the environment impacts on the food system. While they appreciated that these impacts have the potential to be positive, at present the majority believed that the current relationship does more harm than good: 60% of survey respondents reported worrying about the impact of our food system on the environment; 58% cited the impact of climate change on food production as a major concern for the next 3 years.

> "I believe that the general public and the Government are demonstrating increasing concern regarding climate change and sustainability and that this will be reflected in the demands on the food industry in the next 5-10 years." F, 40, B, White British, Children under 8, London

This concern was widespread across the sample in terms of age groups, demographics, lifestages, and so on.[75] In the qualitative research, only a minority (primarily older and more rural participants) reported having not considered the environmental implications of food systems and choices previously.

5.2 The general public view on food ethics and environment

5.2.1 Many felt priced out of making food choices that align with their wider values

There was a widespread sense that 'ethical' and environmentally friendly foods come at a price premium - making these wider consumer interests particularly vulnerable to price pressure. For example, this was assumed to include organic produce, 'ethically reared' meat, Fair Trade products, locally produced foods, etc. Buying food that felt ethically sound thus felt like a privilege available to the few, not an option for the many.

This made environmental and ethical concerns particularly vulnerable to price pressure, leaving many feeling that they could not fully 'shop their values' in this space. For others, it seemed to simply reduce engagement; why worry about something you couldn't do anything about? Amongst the most price-concerned participants in the qualitative research there was sometimes visible discomfort when environmental issues were raised; it felt like a luxury compared to more pressing issues around affordability and access.

> "I'm concerned about the two tier system being created, because there's always gonna be some people who can't afford to worry about environmental issues and need to buy the cheapest products on the market." Workshop Participant: Parent, Children aged 8-15, Higher SEG

5.2.2 Understanding 'the right choice' in terms of ethics and environment was a challenge

Despite generally high interest in environmental issues and food ethics, there was a high degree of confusion about what was a 'right choice' for them in this space. Participants found it difficult to determine what specifically they could do to align with their interests.

> “I feel this is an area I don't feel too close to as I don't think there is anything I can do” Female, 28, B, Scotland

The public reported that information on food products’ environmental or ethical credentials was not always clear or easy to understand, and qualitatively indicated they did not always trust that information when it was available. Only 43% agreed that finding on-pack information about a product’s environmental impact easy to understand; similarly, only 42% agreed that finding on-pack information about animal welfare easy to understand.

Participants in the qualitative research also spoke about feeling that the ‘true’ environmental or ethical implications of the foods they ate were hard to determine. The kind of information they wanted was typically not available on-pack, and information provided by businesses was often not trusted - with some highly environmentally engaged participants mentioning concerns about ‘greenwashing’.

> "I know there's a lot of lobbyists that are paid millions to lobby on behalf of these companies to tell us what we want to hear. ... So you never know what's real anymore." Workshop Participant: Parent, Children under 8, Higher SEG

Although a lesser priority than other action areas outlined in this report, some members of the public (20%) expressed interest in having guidance in future to make it easier to make eco-friendly food choices in their day to day lives. This interest was significantly higher among younger women (under 45) and those in higher socio-demographic groups. It was notable that whilst, as described earlier, 54% express an interest in having a more eco-friendly diet, only 20% expressed an interest in receiving guidance to achieve this in the future - this implies the issue for people is less one of guidance and education, and more one of access and trust in labelling. It is worth noting that when it comes to the public’s priorities for the regulator, 29% cite 'Providing clear guidance on how to make eco-friendly food

choices on a budget' - this higher endorsement in the context of affordability underlines the fact that eco-friendly choices face a perceived cost barrier.

> "Sometimes we're hidden from data, sometimes we like to be hidden from that as well. We have to face the music. The more that's discussed, the more that is brought to the front page, the better for everyone and certainly the better for me, because I can make better choices." M, 56, B, Asian British, Manchester

5.2.3. The public wanted a secure future for British farming and local producers

The future of British farming was a strong area of public engagement across this research. Qualitatively, there was a sense of 'exposure due to Brexit', with people worried that we would need to adopt 'lower' standards from other countries in future, or that local producers would come under increasing pressure in future. This was often linked to beliefs that 'local' food produced in the UK (or, for many devolved nations residents, within their 'home' nation) was likely higher quality than foods imported from abroad.

Quantitative evidence confirmed the public interest and concern in this space.

- 59% cited the future of British farming as a major concern
- 58% cited UK's dependency on food imports as a major concern.
- 34% of people chose access to locally produced foods as a priority area for the future
- 42% of people would like the regulators to work with partners to ensure access to affordable locally produced foods.

More optimistically, some participants saw Brexit as a chance to change the system for the better - investing in local agriculture and making it easier for UK citizens to access local meat and produce. 72% of people said they can access a wide range of

good quality foods locally but only 47% said that they actively try to buy local (often sacrificed for a lower price).

5.2.4 Some also questioned whether personal action can make a difference

More widely, many questioned whether their choices can have any 'real' impact on topics like environmental sustainability or the 'fairness' of our food systems - feeling that corporate interests had much more influence in this space.

Though 61% agreed that 'as a consumer, my food choices can help shape the food system for the better', 75% endorse the view that profit drives the food system[76]. Qualitatively, some expressed a sense that businesses and decision-makers will only make change if 'forced to' by consumers, which for these participants meant consumer choices were very important. However, others challenged that under consumer pressure, businesses will often only do 'just enough' to be seen as taking action - but not enough to create any real change.

> "If Government and big industry are not accepting responsibility, or willing to make any changes and put profits first, then it's unfortunate, it's down to us, as consumers to act with our feet" Workshop Participant: Parent, Children under 8, Higher SEG

This sense of disempowerment, coupled with worry whether food businesses would 'do the right thing' in terms of moving towards more ethical sustainable practice, was a source of clear concern and anxiety for some participants. There was a strong desire from these participants for 'Government' or regulators to take action on their behalf - sometimes coupled with cynicism about whether this was achievable in practice.

> "Expecting the consumer to take action when we are constantly being told we are on a ticking clock with climate change is a bit brave. Until the Government takes that first step, nothing is going to change." Workshop Participant: No Children, Lower SEG

5.2.5 Food and packaging waste serve as tangible flash-points for wider abstract topics

Waste was one area of the food system where most people felt they had tangible power to take action. Waste was also an emotive topic which strongly engaged a majority of the public, both in terms of food and packaging waste - often discussed in the same breath by participants in the qualitative research.

Amongst survey respondents:

- 78% reported finding it unacceptable to throw food away at home[77].
- 64% cited food waste in the food chain as a major concern.
- 65% cited 'packaging waste in the food chain as a major concern.
- 67% said they try to reduce or avoid food products that create plastic waste[78].

Qualitative research suggested this high public interest was driven by multiple factors:

- Substantial recent media attention on waste issues (particularly around plastics).
- A feeling that waste was a tangible symptom of larger issues (environmentally unfriendly practices; wasteful processes; etc.).
- Belief that some progress has been made (for example around plastics waste) and that further change is possible.
- Sense of ethical discomfort or moral outrage that some are left hungry whilst elsewhere food went to waste.

Waste felt like an issue that individuals could have some individual impact on - but there was also eagerness for more systemic change. Many in the qualitative research were critical of the ways in which current food systems encouraged what they saw as 'poor practice' on waste. For example, participants raised discussions around:

- Participants feeling 'pressured' by promotions which encouraged food waste.
- Food being wasted by retailers that could go to those in need.
- Low-waste options being positioned as more premium and expensive.
- Low-waste options being unrealistically inconvenient for many.

> "Pack size is an issue for many people, in my house there is just me and my husband and we don't always need the full pack size for a lot of recipes, so the food goes to waste." M, 41, C1, White British, Child 8+, Manchester

5.2.6 Animal welfare and worker rights are also part of a more sustainable future

As discussed elsewhere, animal welfare was a concern for the majority of survey respondents: 60% saw treatment of animals in the food chain as a major concern for the future of food, though a smaller proportion (41%) wanted, in the next 3 years, to prioritise action towards treating animals in the food chain with dignity. The gap between these two figures underlines that many of those concerned about treatment of animals in the food chain were motivated by the benefits of good animal welfare practices on food hygiene & safety standards rather than motivated by animal wellbeing per se. Indeed, for many in the qualitative discussions, the topic of welfare in the food chain seemed to be about assumed 'safety' as much as ethics or animal rights.

For some, particularly vegan and vegetarian participants, animal welfare was experienced as an urgent concern. These participants tended to think of animal

welfare standards as 'necessary but not sufficient' - also wanting to see promotion of food systems which reduced meat consumption more widely.

> "My wish for the food system and the next generation would be for animal product consumption to reduce dramatically, for the sake of the planet and the animals. Improvements and innovations in plant based foods have increased recently however it would be good in future to have even more options." M, 36, C1, Vietnamese, London

The treatment of workers in the food chain was spontaneously raised in the qualitative research surprisingly often in comparison to previous research, in which this was rarely if ever spontaneously referenced. Quantitatively, 46% saw treatment of workers in the food chain as a major concern, and 32% saw fair treatment of these workers as a priority over the next 3 years. This may be an emergent concern worth monitoring by the FSA/FSS and other decision makers.

In contrast, when farmers and small producers were brought into scope in addition to workers, respondent interest rose: 48% cited 'ensure fair treatment for workers, farmers and small producers in the food chain' as an area for action from the food regulator working with partners. This difference was likely influenced by public desire to see a 'fair deal' for UK agriculture, as discussed previously.

> "Whenever I buy some food that seems really cheap I do wonder how much money actually goes to the farmers. As an example when milk is always around £1.10 I do wonder how the Dairy Farmers earn a living." M, 24, E, White British, Cardiff

5.3 Audience differences around food ethics and environment

5.3.1 Differences in concern around environmental topics

Concerns around the environment were heightened in Northern Ireland and Scotland,[79] among younger respondents (under 45), among rural residents, among BAME participants and those with food allergies or intolerance - as well as among those who were less food secure. It is thus striking that those whose choices were already under pressure were more concerned about the impact of climate change, rendering their food choices even more challenging in future.

5.3.2 Many younger people have strong views - but most have weak purchasing power

Concerns over the impact of climate change on food production were significantly higher among the under 45s, and within that, highest among 18-24 year olds: 65% of people aged 18-24 cited this topic as a major concern for the future of food, against 56% of those aged 55 or more. In contrast, concerns over packaging waste and food waste were equally important across all age groups, averaging at 65/66%.

Qualitatively, the research highlighted that younger people:

- were generally more comfortable talking about 'future of food systems' topics and more educated about/interested in things like sustainable agriculture, vertical farming, local food systems, changing public food habits.
- had higher interest in more structural topics about worker treatment and other 'negative' impacts of global supply chains.
- saw crossover in terms of income pressure: they are frustrated that they can't shop according to their values and worry about contributing to 'harmful' systems. Plus many young people on very low incomes are struggling to afford enough healthy food and without the 'luxury' of caring about wider concerns like sustainability.
- However, their interests around all of these topics were markedly higher than in previous similar qualitative investigations (for example Our Food Futures).[80]

5.3.3 Rural participants are more likely to support more 'local' food economies

Many rural participants expressed strong feelings of connection to local 'place' and agriculture (especially high among those living in rural hamlets or isolated dwellings). They were eager to see farmers and agricultural workers considered and protected by decision-makers, and were particularly supportive of more localised UK food economies.

Data from the quantitative stage for instance showed that, among people in rural areas, there was statistically significantly higher interest in locality and farming preservation:

- 62% described the future of British farming as a major concern (vs. 58% urban areas).
- 61% expressed major concerns over the impact of climate change on food production (vs. 58% urban areas).
- 52% cited support for British farmers and producers as important to them for the future (vs. 45% urban areas).
- 40% mentioned access to locally produced foods as important to them for the future (vs. 33% urban areas).

5.4 Public views on the future of food ethics and environment

In the qualitative research, there was a clear sense of urgency for many around the future of food in relation to ethics and environment topics. Many participants expressed deep worry and anxiety about the increasing impact of climate emergency - and that we might act 'too late' in terms of changing our food systems and choices to avoid or mitigate harm.

For example, when completing 'future of food' tasks and asked to describe the food futures they feared for the UK, some participants described fairly dystopian outcomes, in which profit motives and lack of public engagement had failed to mitigate climate disaster. Many also expressed concern about disproportionate impact on those already vulnerable, both in the UK and globally.

> "I personally see nothing but poverty and famine in respect of the future for our country when it comes to food if nothing is done. People will end up substituting most meals for the cheapest option." F, 41, D, White/Caribbean, Children 8+, Asthma and physical disability, 3 part-time jobs, Manchester

More widely, there was a sense that people 'hoped' for a future in which food systems generally felt 'more safe and ethical'. Ideally, they wanted to see a food system which served the best interests of animals, people and the planet. Some expressed optimism that a strong consumer voice, smart investment in innovation, and/or dedicated action from decision-makers to support more ethical and environmentally sound practice could help achieve this. However, this was countered by a sense of despair and cynicism from others that meaningful change could be achieved.

> "Healthy and nutritious food would be available to everyone at a fair price, allowing us all to live the best lives we can. Food sources such as our oceans would be protected and we would be sustainably fishing trying to limit the amount of marine life deaths as well as ensuring we aren't fishing species to extinction which is currently an issue. I also believe that farmers and growers etc would be looked after well and suitably rewarded for their efforts. I would have more trust in the suppliers of the food and trust that all ingredients in the products are labelled for full transparency to take the worry out of shopping wondering if there are hidden aspects in the products we buy." M, 28, C1, White British, Northern Ireland

5.5 Summary: what people wanted done on their behalf

5.5.1 Future focus

The public wanted Government, the food industry and regulators to work together towards developing a more sustainable system that is fair, ethical and respectful of animals, people and the planet. This was particularly important in the current context where many people feel they can't prioritise or take action on more abstract issues themselves.

In prioritising areas for the regulators, participants mirrored the high concerns they expressed for the future[81], described earlier and summarised below.[82]

- 51% of people saw reducing food waste in the food chain as important to them for the future.
- A high proportion (47%) wanted to see support for British farmers and producers over the next three years.
- A substantial minority (41%) wanted to have a food system that treats animals in the food chain with dignity - though as we have seen this topic related more to food safety than exclusively to ethics and animal wellbeing.

5.5.2 Action areas for the regulator[83]

The key sustainability issues that respondents would like the food regulator to work with partners on were to: 'ensure high standards of animal welfare including imports' (57%), 'ensure fair treatment of workers, farmers and small producers' (48%) and 'set standards to minimise food waste in the food chain' (46%).

This suggests their focus on reducing food waste was not entirely addressed by the possibility of setting standards around it (qualitative feedback suggests they are looking for more pressure on big brands and retailers to take action).

Chapter 6: Health and Nutrition

As explored previously, there was a strong sense in this research that everyone in the UK should have access to 'fresh', healthy, nutritious, good quality food. More widely, there was broad interest in health and nutrition from the public - with perceptions of 'good food' typically meaning food that was 'minimally processed' and nutritious (rather than just satiating hunger by being filling, regardless of nutritional benefits).

The public wanted to live in a world in which it is easy to understand what food is healthy and nutritious, and in which it is easy to make healthy choices. In practice, this ideal was felt to be unachievable for many, with barriers at every level: understanding what 'healthy' foods to prioritise; navigating food labelling and marketing; and eating healthily within budget and time constraints. There was interest in actions from policy-makers and others that would make it easier for people to choose healthy, nutritious food in practice.

6.1 Public interest and engagement around health and nutrition

6.1.1 A majority aspired to eat well and valued access to healthy, nutritious food

Participants varied as to how much they personally prioritised healthy eating (as defined in more detail below) or how easy they found it to put their ideals into practice. However there was strong evidence at all stages that health and nutrition mattered to a majority of respondents: for instance, 63% said they were prepared to make big changes to their lifestyle in order to be healthier.

Health and nutrition often sparked vibrant and emotional discussion amongst participants in the qualitative research because these topics connected to multiple factors that mattered to them deeply: their physical health and fitness; their energy; their mental health; their ability to nourish and protect the people they cared for; the ability of their children to function at school and learn effectively, and so on. Demographics often powerfully shaped interests in this space: for example, younger people were generally more motivated by fitness or sport goals; parents focused on providing nourishing food for children; and older people often prioritising management or prevention of health concerns.

> "Good food equals good health. It is not just about healthy food… it's about having a healthy relationship with food - more than one slice of cake is good health if that is what you need on that day to make you feel better. Food is a lot more than diet - it is linked to our feelings, communication and mental health as well as physical. " F, 30, C2, Pakistani, Children under 8, Asthma, Suburban Wales

There was a sense that more people than ever are aware of how important it is to eat healthily, driven largely by general nutrition education and popular media exposure, including via influential food documentaries. The disruptions of the Covid-19 pandemic had also led many to experiment with new ways of eating or to re-evaluate their dietary choices, even if temporarily - heightening engagement around healthy eating. However, it had often also introduced new pressures, for example with parents having to negotiate conflicting health needs for the family multiple times a day, potentially also whilst working, often leading to more compromises.

> "My partner and I are currently trying to get healthier and fitter after suffering from COVID-19 last year. We are being adventurous and trying new and exciting foods while at the same time trying to ensure we are eating enough

fruit, vegetables and ensuring that our portion sizes are correct to avoid overeating." M, 28, C1, White British, Northern Ireland

6.1.2 High value was placed on 'fresh', 'unprocessed' and 'nourishing' foods

Although individual interpretations varied according to personal priorities and context, there was general agreement about the basics of what constituted 'healthy and nutritious' food: fresh food, minimally processed, and offering a good variety of 'natural' nutrients.

The foods assumed to be most able to deliver 'healthy and nutritious' benefits included fruit and vegetables, 'traditional staples' (milk, bread) and 'good quality' meat. Many also had strong associations between 'healthy' food and home-cooking. 'Healthy' foods were also those judged to be more 'transparent': you knew what you were eating, could pronounce the ingredients, and understood where it came from.

> "Healthy to me is eating fresh fruit and vegetables along with fresh cooked wholesome dinners on a daily basis." F, 41, D, White/Caribbean, Children 8+, Asthma and physical disability, Manchester

In contrast, 'unhealthy foods' were often assumed to be more 'processed', less nutritionally 'balanced', and higher in saturated fat/sugar/salt and 'additives'. They were perceived as less transparent and more opaque: with ingredients that felt unclear, hard to pronounce, and more 'chemical' or 'man made.' 49% reported making specific efforts to avoid buying foods that contain ingredients such as trans fats/palm oil/preservatives/E numbers[84].

> "One thing that worries me regarding food is the amount of processed food that is around. It feels quite difficult to find natural foods now without masses of additives and also at a reasonable price." M, 36, C1, Vietnamese, London

Beyond this, individual interpretations and priorities of what constituted 'healthy and nutritious' foods varied - for example with some prioritising or eliminating certain foods because of health issues; to support physical activity or energy; to manage allergies and hypersensitivities; because of ethical beliefs around meat and dairy consumption, and so on.

6.2 The general public's view on health and nutrition in the UK

Few people in this research felt able to consistently access and eat the food they most aspired to in terms of health and nutrition; there were often large gaps between what they wanted to do in theory and the choices they made in practice. These gaps were driven by challenges and barriers at multiple levels.

Individually, these barriers made decision-making around health and nutrition harder. Collectively, they led many to feel that the UK food system was 'stacked against' them - with modern consumers driven to make choices that don't align with their health ideals. Eating healthy thus felt to many, like a privilege - not a right.

6.2.1 Navigating 'what's healthy' felt complex in practice

Many people in this research felt that they had a good sense of what it meant to 'eat healthy', and felt it was fairly easy to identify foods which were 'nutritious'. This instinctive perception was evidenced by 70% of survey respondents stating they were 'confident I know what a healthy nutritious diet is for me'.

However, at a more detailed level, the public often felt that deciding what is healthy for them and the people they shopped and cooked for was a challenge. Many found it hard to know which 'experts' to trust, or how to navigate conflicting views - for example, with some extolling the virtues of protein for health and strength, and

others viewing meat consumption as a public health disaster. Health trends were seen as shifting over time; what was 'true' today in terms of the health value of a given food might change tomorrow.

> "It can be difficult to decide what is healthy and I always read the labels. However, there is a lot of confusion at times about what is healthy as diet food can contain high levels of sugar, salt etc." F, 57, B, Black Caribbean, Household heath issues, Manchester

Priorities and needs around health and nutrition were also experienced as dynamic, multiple and often conflicting. Within individuals, needs evolved over time in response to shifting health status, work and family dynamics, moods and mental health states, and so on. Within households, health and nutrition needs were often conflicted; one parent might be shopping for a red-meat restricted partner with heart issues; a gym-going, protein hungry teen; a young picky eater whose vegetables were 'snuck into' food, and so on.

> "As a working mum, I always try to prepare food in advance so that food is ready quickly. For others in my household it plays out in these ways - our eldest son is very health conscious and prepares healthy meals at university, however he also enjoys some fast food/takeaways. Our 2 younger children are more interested in fast food! My husband and I are trying to eat less red meat and more chicken, fish and vegetable dishes." F, 40, B, White British, Children under 8, London

6.2.2 For many, healthy eating guidance felt unhelpful and/or outdated

In the face of these layered and complex challenges to healthy eating, the guidance available to the public often felt insufficient, on multiple levels:

- ‘Simple’ guides (like the EatWell plate) were useful in cutting through overwhelm, but felt hard to translate into actual shopping choices.
- Guidance did not feel helpful in navigating layered and conflicting health needs within households.
- Guidance was not seen to take into account financial constraints, or to support people to make realistic healthy choices on constrained budgets.
- Some guidance felt patronising or stigmatising - for example, with some participants citing BMI health guidelines as ‘flawed’ or biassed towards white ethnicities.
- To some, guidance felt overly focused on calories rather than nutrients - this being unhelpful in terms of more holistic health, and harmful in terms of eating disorder management.

> "There’s a huge marketing thing on low-calorie food [but] you can have a low-calorie food but it’s got no nutritional value. Like rice cakes have no nutritional value, but young people think it's OK to eat but they’re not getting anything out of it. Something more nutrient dense and higher calorie might be healthier. People should be educated on this more." Workshop Participant: Pre-family, Higher SEG

Some participants noted that, collectively, these gaps sometimes made them feel as if guidance was being provided by people that were ‘out of touch’ with the modern-day realities facing the UK public.

> “I think it's important to understand that the people making decisions have the power to make decisions for people who don't have power and who don't have money. They will never understand what we experience day to day just dealing with regular life, and it's very hard for a person who doesn't know what it's like to live like this to make decisions around how we live. So I think they need to get more involved in the community, and to see what the

community needs." F, 48, DE, White Irish, Food intolerances and disability, Northern Ireland

6.2.3 Food marketing and promotions were perceived as 'pushing' unhealthy food

In general, the UK public did not feel that food marketing and promotions encourage them to make healthy choices. 54% agreed that they feel supermarkets encourage them to buy unhealthy foods[85] - with participants in the qualitative research often reporting frustration that promotions tend to centre on more processed products.

> "I try to purchase products which are on offer or multi-buy deals. This allows me to buy higher quality food for a lower price … This is how I wish things would change - deals and offers were on more healthy foods than junk foods." F, 35, C1, Scotland

Many also reported feeling that it was often difficult to tell if a food was 'actually' good for you from the claims made by the brand or the look and feel of the product, with 61% of survey respondents reporting that they often felt that foods labelled as 'healthier options' were unhealthy in other ways[86].

For example, participants spoke about feeling 'misled' by products that were 'vegan' or 'organic' but included perceived unhealthy levels of fat/salt/sugar and so on. Some also expressed cynicism about the health value of reformulated products - i.e., whether companies were reducing fat/sugar/salt on one side but increasing other 'unhealthy' ingredients at the same time.

> "Producers and manufacturers will put stuff in food in a way that we're not aware of what they really mean - like sugar being renamed glucose or sucrose or whatever. I think it's just unfortunate that you can go and buy an

> item and think you understand what you're buying and what you're putting in your body to only then find out with more research that you were lied to and fooled into that false sense of security." M, 33, C1, Black British, Bristol

As a result, many felt as if they were being at best unsupported by the food industry in terms of making healthy choices, and at worst actively misled. Labels and marketing seemed to look as if they were providing useful information for people - whilst actually making their decisions harder. Some participants, primarily younger, voiced these concerns explicitly in terms of social inequalities - worried that poorer UK people were 'targeted' by fast food and convenience food brands that may contribute to worse health outcomes for worse-off social groups.

6.2.4 Many found health and nutrition labelling hard to interpret or unhelpful

In theory, there is a great deal of health and nutrition information available on food labels to guide personal choices. 'Traffic light' type labels were also considered useful for many; often raised as a gold-standard of clear, simple, visual communication, and generally easily understood.

However, beyond this many found health and nutrition information on labels confusing, hard to read, or unhelpful in terms of actually making informed decisions. 37% of survey respondents reported difficulties in fully understanding what a product contains[87]. Qualitative evidence also suggested people faced challenges on many fronts simultaneously, for example in terms of:

- Reading and interpreting scientific and technical terms - particularly given the small text of most label information.
- Accessing clear information about food processing methods used - for example around the use of pesticides, preservatives, hormones, and so on - and their impact

- Understanding the 'actual' amount of fat, sugar or salt in a product. For example, people perceived sugars as being 'hidden' in labels by appearing under less familiar names (for instance dextrose, corn syrup) - or that multiple different forms of sugar were being used in the same product.
- Identifying the actual amount of calories included in a 'realistic' portion of food; 'scaling up' calculations from portion size to packet size/meal size felt difficult.
- Understanding the nutritional density and total 'health value' of a given food
- Using labels to assess information relevant to personal lifestyle or health needs - for example, anti-inflammation diets, 'heart health' and so on

> "It's the labelling around the ingredients that are in the food, it's not in plain simple English. And a lot of people don't understand it. Well, I don't. And it has those codes like EC1 or something." Workshop Participant: Parent, Children 16+, Lower SEG

Even where overcoming these barriers felt theoretically possible, it added friction during an already pressured moment of decision making for participants. This had the effect of lowering their ability to make choices in line with their personal health priorities:

> "Unfortunately, there's an awful lot of people that are running 100 miles an hour. And they don't have the time to stop and check all these things. They just pick things up." F, 63, B, Scotland

6.2.5 Eating healthily was perceived as a matter of privilege

The public felt that eating in a healthy and nutritious way almost inevitably involved spending more money, more time and effort, or both. The trade-offs between health interests, price and convenience were familiar to many[88]:

- 53% of survey respondents felt priced out of healthy foods;

- 50% reported worry about the long-term impact of their food choices on their health;
- 31% said they found it difficult to find fresh foods that fit their budget;
- 25% felt heavily processed foods were often the only option available to them.

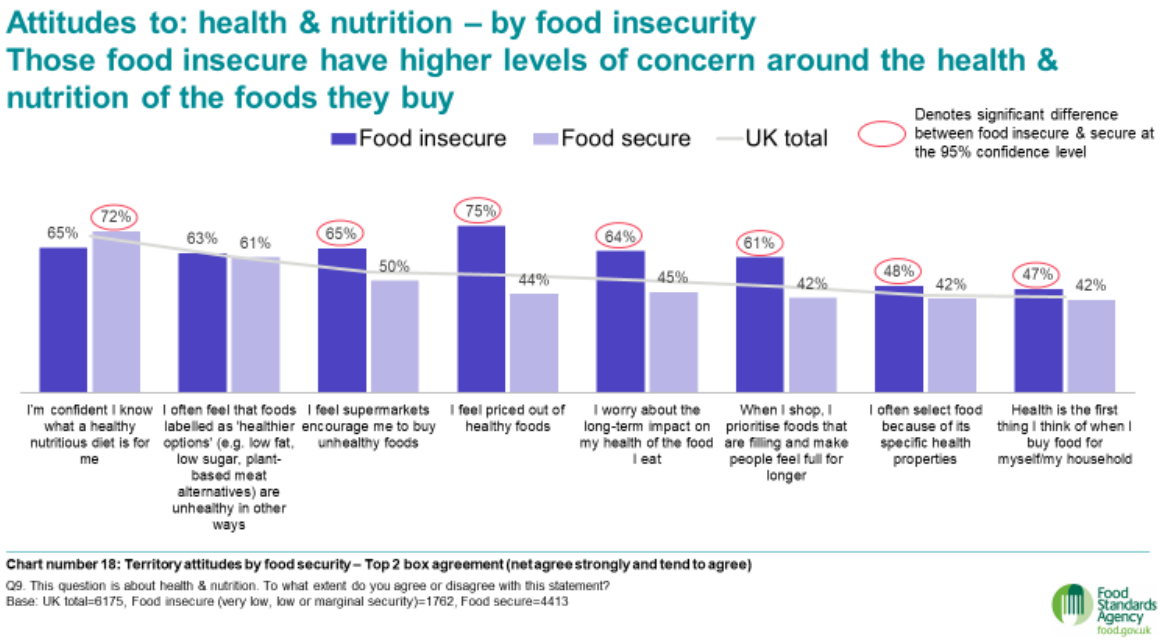
"I try to have healthy food because it's really important, but a lot of times I can't afford it. So we stick to chicken and chips because it's so much cheaper to go and spend five pounds and all of us can have a proper dinner at the end of the evening. Whereas when I have to get something healthy, it turns out to be about 20 to 30 pounds" Workshop Participant: Parent, Children 16+, Lower SEG

6.3 Audience differences in priorities and needs around health and nutrition

6.3.1 Less food secure people face more barriers to eating healthily

As explored in Ch 2, price was widely considered a barrier to healthy eating - and challenges around access to healthy, nutritious food were amplified for lower income respondents, less food secure people, BAME respondents and (for some measures) younger families.

Figure 4. Attitudes to health and nutrition, by food insecurity



Statistically significant differences were observed between those less secure[89], compared to those more secure. Among the less food secure respondents:

- 75% agreed that they feel priced out of healthy food (vs. 44% of food secure respondents)
- 56% reported finding it difficult to access fresh food (for example fruit, vegetables, meat) that fits their budget (vs. 21% of food secure respondents)
- 65% felt encouraged by supermarkets to buy unhealthy food (vs. 50% of food secure respondents)

> "I think fresh produce will be on a very steep decline unfortunately."
> Quantitative survey participant: Male, C2/D, No Children, England

More widely:

- 60% of people aged 18-44 (significantly higher than 43% among those aged 45+) and 61% of BAME respondents (significantly higher than 49% among White respondents) said that they were worried about the long-term impact of their food choices on their health (v. 50% overall)

- 57% of respondents with young families (significantly higher than all other life-stages) and 48% of BAME respondents (significantly higher than 39% among White respondents) reported worry that their diet lacked variety (versus 40% overall).

  "As much as they shove healthy eating down your throat it's still not made affordable." Workshop Participant: Parent, Children 8+, Lower SEG

6.3.2 Serious illness, allergies and/or disabilities increased barriers for many

For people with chronic conditions, disabilities, or allergies in the household, eating well was often at the forefront of their mind, either because their condition significantly impacted what they could eat, or because they saw eating as a way to heal. Many also needed to take a more bespoke approach to 'healthy eating' to avoid unhelpful or harmful ingredients; accommodate nutritional or texture needs; fuel recovery or maximise functioning; and so on.

However, even as healthy eating was often experienced as more urgent or important in this group, for many it was also less financially feasible. For some, health problems significantly restricted income (for example, due to having to reduce or abandon work). For all, costs were higher, for example in the form of:

- Having to buy ergonomic utensils or pre-chopped packaged foods (more expensive than loose fruits and vegetables).
- Needing to rely on more expensive speciality and free-from foods.
- Increased cost of shopping for those with mobility issues (transport, car fuel, minimum spend of £40 for deliveries, food delivery costs).
- Not being able to shop around for more affordable options because of energy deficits, cognitive or sensory overload, brain fog, and so on.

> "I used to be the sort of person for whom food was all about enjoyment and I wouldn't question really what I was putting in my body but then I started feeling unwell. It's more about nutrition now and about what feels comfortable and doesn't flare up my condition. Because of my esophageal condition, I need softer foods, like mash or soup. I try to batch-cook on days I am well, but that takes a toll on me." F, 38, B, White British, Multiple chronic health issues, Scotland

In particular, people experiencing energy-limiting chronic illnesses (ELCI) or disabilities[90] (for example, Long Covid or ME/CFS) faced pronounced barriers to eating well, often needing to sacrifice their nutritional ideals to preserve their energy. This group might be particularly important for food policy-makers to be mindful of given the substantial percentage of people with Covid that go on to develop energy-limiting chronic illness.[91]

> "I wonder if there will be enough foods to cater for coeliac disease and someone like myself with a blood disorder." Quantitative survey participant, Female, Pre-Kids, Lower SEG, Northern Ireland

Preparing food from scratch - in theory, a helpful way to meet bespoke dietary needs and to manage food budgets - took time and energy these participants simply didn't have. Participants in this group thus faced the dilemma of spending the little energy they have on preparing food that suited their needs or eating convenience foods such as pre-chopped foods or ready meals. However, their options felt unsatisfactory on one or more levels: more expensive, more processed, less fresh, and more likely to contain allergens like dairy or gluten. Some reported skipping meals due to feeling too unwell to shop or cook.

> "It does sound pathetic to someone who is quite healthy, but sometimes even the motion of mashing through it in a pot, my arms get quite weak at times." F, 38, B, White British, Multiple chronic health issues, Scotland

6.3.3 Parents felt under pressure to provide healthy food and unsupported in doing so

Many parents in this research felt our current food systems do not support them well enough to provide healthy food for their families. Many expressed frustration about 'unhealthy' foods being marketed to children and young people; about the additional difficulty of navigating 'misleading' marketing as a busy parent; and the perceived absence of effective food education in schools.

> "I think if you just take everything at face value, it's easy to get bought into buying stuff that appears to be better for you but is not. […] They advertise a lot of things as 'this is great for your kids, this is healthy for your kids'. But when you get into what's actually in that, it's all hidden sugars and stuff like that. It's not clear." Workshop Participant: Parent, Children under 7, Higher SEG

6.4 Summary actions: representing and protecting people's interests around health and nutrition decision-making

6.4.1 Future focus

As explored in more depth in Ch 3.1, ensuring the affordability of healthy food was the public's core concern in this space - in line with concerns about the negative impacts of rising financial pressures and rising food prices more generally. We also saw a level of mistrust from participants that foods labelled as healthy options may be harmful in other ways.[92]

Although not featuring in the quantitative survey results, participants in the qualitative research were eager for more action to be taken on food marketing aimed at young people, and for support to help their children establish good habits early. There was also a sense that future guidance needed to be more 'up to date' and tailored in terms of helping navigate modern life pressures and barriers to healthy eating.

> "It would be good if there was guidance that says we are all unique and discuss all the ways you can approach your food - anti-inflammatory, organic only, etc." F, 20, D, White British, Food intolerances, Scotland

6.4.2 Action areas for the regulator[93]

Many people were unsure of exactly what bodies like the FSA/FSS could achieve to support their aspiration to healthier food choices. Respondents' priority actions for regulators focused more on the delivery of transparent and trustworthy food labelling and health information.

People wanted action taken to represent and protect their interests in this space. Respondents' main priority for the FSA/FSS was to ensure food health claims genuinely deliver a healthier choice - 51% of survey respondents wanted the FSA/FSS to ensure that food labelled as 'healthy' is genuinely a healthier option.

However, in qualitative research there was a sense of frustration and powerlessness about this challenge, with people feeling unsure whether the FSA/FSS or their partners would have any power over issues like these, where drivers of supply and demand became complicated.

Chapter 7: Priority next steps in summary

What interests the public most want to see represented and protected around food

This chapter focuses on what people see as the priorities for the future of food in the UK over the next 3 years, and how decision-makers might approach meeting the public's varied and multi-layered expectations for the future. It is important to highlight that the actions explored with the public may not be deliverable by the food regulators acting in isolation, but may require a coordinated approach between different actors in the food system (for example Government agencies, departments, local authorities, food industry, retailers etc). The public do not see it as their responsibility to identify who is best placed to act; but it is clear that they want 'someone' to look after them and their interests. Detailed data tables supporting the findings summarised in this Chapter can be found in Appendix A.

7.1 Summary of interests the public want protected

All four of the 'wider interest' issue areas identified in the qualitative research and explored in more depth in the quantitative research were shown as important to the UK public. As outlined previously, ranking these in strict priority order is difficult if not impossible. Public priorities varied even within the same person depending on whether taking the perspective of priorities *right now* or *for my future* - and more tangible 'actions' often attracted greater support than more abstract ones, even for issues that people had otherwise ranked as very high priority for them.

However, the key areas of interest for the public, as detailed in the earlier chapters of this report, are roughly ranked as follows (see Appendix A for fuller data tables) - drawing on combined qualitative rankings and prioritisations; quantitative issue prioritisations and strength of response within these and so on. As seen throughout

this report, there was also a lot of commonality in these priorities between people across the four nations.[94]

1. **Supporting equitable access to safe, affordable food.** The public wanted to see Government action to ensure that everyone can access healthy food at affordable prices - and access to low-priced food that is not over-processed and meets good quality standards. This issue was most highly-rated across all future actions areas in the quantitative research, and qualitatively seen as cutting across all other 'wider interests' and concerns: if you can't afford to eat in a safe and healthy way, the other actions taken on your behalf fade in importance in comparison.

2. **Ensuring high standards of food safety and hygiene:** although participants trusted current standards, they wanted the level of food safety and hygiene in the food chain to remain high in future as the UK food trade evolves. Ensuring 'high standards across the food chain' was the second-highest interest area in the quantitative research, and consistently the highest-rated interest area in the qualitative research.

3. **Ensuring ethical, sustainable food systems:** People wanted decision-makers to ensure that our food systems felt fair, ethical and sustainable. A big 'flashpoint' for participants was the need to reduce food waste in the food chain; but this complex topic also linked to supporting British provenance and ensuring safe and ethical treatment of animals in the food chain, As discussed in earlier chapters, provenance and animal treatment cut across both environmental concerns (lower transport, lower pollution, avoiding intensive animal farming and its perceived negative impact on nature) and safety concerns (more control of quality standards, food inspection, clarity of labelling, more trust that safety standards and food hygiene have been respected).

4. **Supporting easier choice-making around health and nutrition:** As above, the public's primary interests in this space were around equitable access to healthy, affordable, fresh food. However, there was also substantial interest in supporting the public to more easily make healthy, nutritious choices - particularly amongst lower-income people and other disadvantaged groups who were more likely to report low-trust and feeling 'misled' or confused by food information and marketing. Quantitatively, ensuring clear information is provided about the food people eat; ensuring foods labelled 'healthy' actually are; and providing guidance to make healthy food choices more easily were top interest areas for future action.

7.2 Priority actions for Government and industry

Using the same list of topics used to assess the public's interests, people also indicated which issues they wanted the Government[95] and the food industry to prioritise in the next three years. In both cases respondents were asked to select up to 3 issues.

There was a lot of commonality in respondent priorities for Government and industry, with the same patterns observed overall in the UK, and between the different UK nations.[96] This suggests an expectation that Government and food businesses should work together as part of a common framework. This fits a landscape where both parties are seen as not currently protecting people's interests: to address these interests in the future, both need to be involved in action.

The public's view of priorities for Government and industry should be viewed in the context of their perception that neither entities truly represent the public's interests in the food system at present. The public have expressed clearly the issues that matter to them (see 7.1); within that there are topics on which they feel Government and the industry can play a part.

7.2.1 People's priorities for Government

Across all issue spaces, people's priorities for Government were, in order of interest:

1. Support for British farmers and producers/fewer imports
2. Access to healthy food products at affordable prices
3. High standards of food safety and hygiene across the food chain
4. Access to low-priced food that is not over-processed and meets good quality standards
5. Reducing food waste in the food chain

7.2.2 People's priorities for the food industry

Across all issue spaces, people's priorities for the food industry were, in order of interest:

1. Providing access to healthy food products at affordable prices
2. Support for British farmers and producers/fewer imports
3. Reducing food waste in the food chain
4. Access to low-priced food that is not over-processed and meets good quality standards
5. High standards of food safety and hygiene across the food chain

Appendix A: Additional data tables

Future interests and priorities: additional data tables

This Appendix contains data tables of potential interest to readers in terms of priority public actions and concerns. Separately, the project Technical Appendix contains full details of project samples, method, analytic approach and so on.

The priorities and interests summarised below were presented in a randomised list derived from participants' discussions held at the qualitative stage and categorised into themes during the qualitative research analysis stage. In the survey, from the options presented respondents selected up to 3 topics they felt were the most important to them.

Strength of index measure

An index was calculated to measure the 'strength of interest'. This showed the proportion of people who expressed an interest in a topic and who then also selected it as one of their 'most important' area of interest[97].

While the baseline measure of interest gives a clear measure of the reach of a particular topic, the 'strength of interest index' provides an important indication of prioritisation for the public.

How to read these tables

Below, data tables on consumer priorities are presented separately for UK-wide data; England, Wales and Northern Ireland priorities (excluding Scotland); and Scotland only.

For all tables, the most important interests as calculated using the strength of interest index are indicated in bold. An index of 50+ denotes high strength of interest for those interested in this topic.

Future interests and priorities data tables: UK-wide data on priorities for Government and the food industry

All the below tables are based on all-respondent data (total N=6175).

Table A1.1: UK - Priority for Government and the food industry - Food Safety and Hygiene

Survey statement	Consumer interests - All mentions	Consumer interests - Top 3 mentions	Consumer priorities for Gov - Top 3 selection	Consumer priorities for industry - Top 3 selection	Strength of interest INDEX
High standards of food safety and hygiene across the food chain	**44%**	**24%**	**27%**	**25%**	**55**

Table A1.2: UK - Priority for Government and the food industry - Access to affordable, good quality, healthy foods

Survey statement	Consumer interests - All mentions	Consumer interests - Top 3	Consumer priorities for Gov - Top 3	Consumer priorities for industry - Top 3	Strength of interest INDEX
Access to healthy food products at affordable prices	**50%**	**34%**	**34%**	**34%**	**69**
Access to low-priced food that is not over-processed and meets good quality standards	**41%**	**24%**	**25%**	**26%**	**59**

Survey statement	Consumer interests - All mentions	Consumer interests - Top 3	Consumer priorities for Gov - Top 3	Consumer priorities for industry - Top 3	Strength of interest INDEX
Access to locally produced foods	34%	15%	11%	13%	42

Table A1.3: UK - Consumer future interests, priority for Government and the food industry - Health, nutrition and labelling

Survey statement	Consumer interests - All mentions	Consumer interests - Top 3	Consumer priorities for Gov - Top 3	Consumer priorities for industry - Top 3	Strength of interest INDEX
Clear information I can trust about the food I eat	37%	15%	12%	14%	39
Confidence that food products labelled as healthy are what they claim to be	35%	12%	13%	15%	36
Guidance to make it easier to make healthy food choices	23%	8%	9%	9%	33

Table A1.4: UK - Consumer future interests, priority for Government and the food industry - Environment, ethics and welfare

Survey statement	Consumer interests - All mentions	Consumer interests - Top 3	Consumer priorities for Gov - Top 3	Consumer priorities for industry - Top 3	Strength of interest INDEX
Reducing food waste in the food chain	**51%**	**28%**	**24%**	**28%**	**55**
Support for British farmers and producers/fewer imports	**47%**	**28%**	**38%**	**30%**	**59**
A food system that treats animals in the food chain with dignity	**41%**	23%	22%	24%	**56**
A food system that respects the environment or the climate	38%	20%	21%	20%	**54**
A food system that treats workers in the food chain fairly	32%	11%	14%	15%	35
Guidance to make it easier to make eco-friendly food choices	20%	5%	6%	6%	26

Outside of the data represented in the tables above, other consumer interests in 'all mentions': Something else: 1%; None: 7%

Future interests and priorities data tables: England, Wales and Northern Ireland data on priorities for Government and the food industry

All of the below tables are based on data from England, Wales and Northern Ireland only, excluding Scotland (total N=6175).

Table A2.1: EWNI - Priority for Government and the food industry - Food Safety and Hygiene

Survey statement	Consumer interests - All mentions	Consumer interests - Top 3 mentions	Consumer priorities for Gov - Top 3 selection	Consumer priorities for industry - Top 3 selection	Strength of interest INDEX
High standards of food safety and hygiene across the food chain	**44%**	**24%**	**27%**	**25%**	**55**

Table A2.2: ENWI - Priority for Government and the food industry - Access to affordable, good quality, healthy foods

Survey statement	Consumer interests - All mentions	Consumer interests - Top 3	Consumer priorities for Gov - Top 3	Consumer priorities for industry - Top 3	Strength of interest INDEX
Access to healthy food products at affordable prices	**50%**	**34%**	**34%**	**34%**	**68**

Survey statement	Consumer interests - All mentions	Consumer interests - Top 3	Consumer priorities for Gov - Top 3	Consumer priorities for industry - Top 3	Strength of interest INDEX
Access to low-priced food that is not over-processed and meets good quality standards	**41%**	**24%**	**25%**	**26%**	**59**
Access to locally produced foods	34%	14%	11%	13%	42

Table A2.3: UK - Consumer future interests, priority for Government and the food industry - Health, nutrition and labelling

Survey statement	Consumer interests - All mentions	Consumer interests - Top 3	Consumer priorities for Gov - Top 3	Consumer priorities for industry - Top 3	Strength of interest INDEX
Clear information I can trust about the food I eat	37%	15%	12%	15%	39
Confidence that food products labelled as healthy are what they claim to be	35%	12%	12%	15%	36
Guidance to make it easier to make healthy food choices	23%	8%	9%	9%	33

Table A2.4: ENWI - Consumer future interests, priority for Government and the food industry - Environment, ethics & welfare

Survey statement	Consumer interests - All mentions	Consumer interests - Top 3	Consumer priorities for Gov - Top 3	Consumer priorities for industry - Top 3	Strength of interest INDEX
Reducing food waste in the food chain	**51%**	**28%**	**24%**	**28%**	**55**
Support for British farmers and producers/fewer imports	**47%**	**28%**	**39%**	**30%**	**60**
A food system that treats animals in the food chain with dignity	**41%**	23%	22%	24%	**56**
A food system that respects the environment or the climate	38%	20%	21%	20%	**54**
A food system that treats workers in the food chain fairly	32%	11%	14%	15%	35
Guidance to make it easier to make eco-friendly food choices	20%	5%	6%	6%	26

Outside of the data represented in the tables above, other consumer interests in 'all mentions': Something else: 1%; None: 7%

Future interests and priorities data tables: Scotland data on priorities for Government and the food industry

Table A3.1: Scotland - Priority for Government and the food industry - Food Safety and Hygiene

Survey statement	Consumer interests - All mentions	Consumer interests - Top 3 mentions	Consumer priorities for Gov - Top 3 selection	Consumer priorities for industry - Top 3 selection	Strength of interest INDEX
High standards of food safety and hygiene across the food chain	**44%**	**25%**	**29%**	**25%**	**57**

Table A3.2: Scotland - Priority for Government and the food industry - Access to affordable, good quality, healthy foods

Survey statement	Consumer interests - All mentions	Consumer interests - Top 3	Consumer priorities for Gov - Top 3	Consumer priorities for industry - Top 3	Strength of interest INDEX
Access to healthy food products at affordable prices	**52%**	**36%**	**33%**	**37%**	**70**

Survey statement	Consumer interests - All mentions	Consumer interests - Top 3	Consumer priorities for Gov - Top 3	Consumer priorities for industry - Top 3	Strength of interest INDEX
Access to low-priced food that is not over-processed and meets good quality standards	**41%**	**25%**	**26%**	**27%**	**61**
Access to locally produced foods	38%	17%	13%	14%	43

Table A3.3: Scotland - Consumer future interests, priority for Government and food industry - Health, nutrition and labelling

Survey statement	Consumer interests - All mentions	Consumer interests - Top 3	Consumer priorities for Gov - Top 3	Consumer priorities for industry - Top 3	Strength of interest INDEX
Clear information I can trust about the food I eat	39%	15%	10%	14%	39
Confidence that food products labelled as healthy are what they claim to be	35%	13%	14%	14%	37
Guidance to make it easier to make healthy food choices	23%	8%	10%	9%	33

Table A3.4: Scotland - Consumer future interests, priority for Government and food industry - Environment, ethics & welfare

Survey statement	Consumer interests - All mentions	Consumer interests - Top 3	Consumer priorities for Gov - Top 3	Consumer priorities for industry - Top 3	Strength of interest INDEX
Reducing food waste in the food chain	**51%**	**27%**	**24%**	**30%**	**52**
Support for British farmers and producers/fewer imports	**45%**	**25%**	**37%**	**25%**	**55**
A food system that treats animals in the food chain with dignity	**41%**	24%	23%	23%	**57**
A food system that respects the environment or the climate	38%	19%	23%	20%	**50**
A food system that treats workers in the food chain fairly	32%	11%	15%	17%	35
Guidance to make it easier to make eco-friendly food choices	21%	6%	6%	6%	30

Outside of the data represented in the tables above, other consumer interests in 'all mentions': Something else: 1%; None: 6%

In more detail: priority regulator actions for the future of food

The FSA holds the regulatory remit for England, Wales and Northern Ireland. The FSS holds the regulatory remit for Scotland. Survey questions to the public regarding regulator actions were slightly different for each audience and have been reported separately.

In each of the 'issue areas' reported below, participants were asked to pick a maximum of three desired actions from a total of 6 potential choices.

Price and food choices

Regulator	FSA (EWNI)	FSS (Scotland)
1	Ensure greater choice of basic low-priced foods of good quality (48%)	Ensure greater choice of basic low-priced foods of good quality (47%)
2	Ensure promotions include fresh produce and fresh foods, not just processed foods (42%)	Ensure meals served in nurseries, schools, care homes, hospitals are healthy and nutritious (45%)[98]
3	Ensure access to affordable, locally produced foods (41%)	Ensure access to affordable, locally produced foods (44%)
4	Ensure meals served in nurseries, schools, care homes, hospitals are healthy and nutritious (40%)	Ensure children receive the nutrition they need at school and at home (43%)[99]

Regulator	FSA (EWNI)	FSS (Scotland)
5	Ensure children receive the nutrition they need at school and at home (39%)	Ensure promotions include fresh produce and fresh foods, not just processed foods (41%)
6	Encourage big food brands to offer a greater choice of healthy products (33%)	Encourage big food brands to offer a greater choice of healthy products (30%)
	Only 6% did not want the FSA to take any action in this policy area.	Only 5% did not want FSS to take any action in this policy area.

Food safety, hygiene and standards

Regulator	FSA (EWNI)	FSS (Scotland)
1	Hold companies account in a visible way (50%)	Hold companies account in a visible way (51%)
2	Take action to reduce additives (47%)	Enforce clearer labelling of food ingredients and allergens (44%)
3	Enforce clearer labelling of food ingredients and allergens (43%)	Take action to reduce additives (43%)
4	Ensure the public can easily report unsafe food handling in places that serve food (36%)	Ensure the public can easily report unsafe food handling in places that serve food (38%)
5	Make it easier to under understand best before/use by dates (30%)	Communicate more about food inspections of places that serve food (31%)
6	Communicate more about food inspections of places that serve food (27%)	Make it easier to under understand best before/use by dates (30%)
	Only 7% did not want the FSA to take any action in this policy area.	Only 6% did not want FSS to take any action in this policy area.

Health and nutrition

Regulator	FSA (EWNI)	FSS (Scotland)
1	Ensure food labelled as 'healthier option' is genuinely healthier for you (51%)	Ensure food labelled as 'healthier option' is genuinely healthier for you (49%)
2	Give more clarity on fat, salt and sugar content in food products (38%)	Provide clear guidance on how to make healthy choices on a budget (40%)[100]
3	Develop a simpler, consistent system across stores to label health information on packs (37%)	Develop a simpler, consistent system across stores to label health information on packs (37%)
4	Provide clear guidance on how to make healthy choices on a budget (36%)	Give more clarity on fat, salt and sugar content in food products (36%)
5	Create a single score to show on food packaging how nutritious the product is (34%)	Provide clear guidance on the health impact of processed foods (34%)
6	Provide clear guidance on the health impact of processed foods (32%)	Create a single score to show on food packaging how nutritious the product is (33%)
	Only 8% did not want the FSA to take any action in this policy area.	Only 7% did not want FSS to take any action in this policy area.

Ethics and environment issues

Regulator	FSA (EWNI)	FSS (Scotland)
1	Ensure high standards of animal welfare, including for imported foods (57%)	Ensure high standards of animal welfare, including for imported foods (56%)
2	Ensure fair treatment for workers, farmers and small producers in the food chain (48%)	Ensure fair treatment for workers, farmers and small producers in the food chain (48%)
3	Set standards to minimise food waste in the food chain (46%)	Set standards to minimise food waste in the food chain (44%)
4	Ensure 'food miles' information is clearly given on food products (29%)	Ensure 'food miles' information is clearly given on food products (31%)
5	Provide an 'eco-label' on food products to show their environmental impact (29%)	Provide an 'eco-label' on food products to show their environmental impact (30%)
6	Provide clear guidance on how to make eco-friendly choices on a budget (28%)	Provide clear guidance on how to make eco-friendly choices on a budget (30%)
	Only 8% did not want the FSA to take any action in this policy area.	Only 7% did not want FSS to take any action in this policy area.

Endnotes

1. Food Standards Agency. Social Science. Gov.uk.

2. Blundell R & et al. Inequality and the Covid crisis in the United Kingdom. Institute for Fiscal Studies. 2022; Sweetland J, Lasko-Skinner R. Food in a Pandemic. Demos. 2021.

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7. Connors C, Malan, L, Canavan S, Sissoko F, Carmo M, Sheppard C, Cook F. The lived experience of food insecurity under Covid-19. Bright Harbour and Food Standards Agency. 2020; Ferguson R. New map shows where millions of UK residents struggle to access food. University of Sheffield. 2021.

8. Perry S. Latest data highlights a growing mental health crisis in the UK. The Health Foundation. 2021; Mental Health Foundation. Teenagers' mental health under severe pressure as pandemic continues - new research.

9. UK Health Security Agency. Omicron daily overview: 31 December 2021. 2021.
10. Office for National Statistics. Energy prices and their effect on households. February 2022.
11. Woodcock A. Trust in UK politicians hits all-time low in wake of sleaze scandal. Independant. 2021.
12. Henley J. Food shortages hitting Britons more than many in EU, poll finds. The Guardian. December 2021; Munbodh E. Families warned food shortages in UK 'inevitable' this summer due to lack of staff. The Mirror. June 2021; Food Standards Agency, Ipsos Mori. Consumer Insights Tracker. November 2021.
13. Lasko-Skinner R, Sweetland J. Food in a Pandemic. From Renew Normal: The People's Commission on Life After Covid-19. Demos. 2020: 57; TNS BMRB. FSA Strategy 2015-2020. Food Standards Agency. 2014.
14. Food Standards Agency, TNS BMRB. Our Food Future. Food Standards Agency, Food Standards Scotland, Sciencewise. 2016.
15. As noted in the FSA's Transparency report in 2019: "Participants believed that the strength of the UK food system relies on the cooperation of various stakeholders. Food businesses (farmers, producers, manufacturer, and retailers), Government (local, regional and national), regulators, consumers, and others (the third sector, the media etc.) all have a role to play in protecting the consumer, as participants felt no single body has a full view of the whole food system."
16. For example, in 2019, 73% of respondents (of those who were aware of FSA) reported trusting the FSA to do its job. Food Standards Agency. Public Attitudes Tracker. Food Standards Agency & Government Statistical Service. February 2020.
17. This feeling of price pressure has long been noted in previous research, though it felt heightened in this piece of work. Food Standards Agency, Ipsos Mori. Healthy and Sustainable Diets: Consumer Poll. Food Standards Agency. 2021.
18. QX2. Which, if any, of the following have you experienced in relation to food in the past 12 months? - 35% selected "None", 65% selected one or more changes of behaviour.

19. See Chapter 1 and the Technical Report for more information about how this measure was calculated. Definition of food security aligned with that of the United States Department of Agriculture, see USDA measures.
20. Here and elsewhere when reporting 'concerns over the future of food', reported percentages combine 'Extremely concerned' and 'Quite concerned' responses.
21. Q20b. Which of these issues would you want the food industry (for example, retailers, food producers and suppliers) to prioritise in the next 3 years? Maximum 3 issues selected. 34% selected as a top-3 issue.
22. Q20b. Which of these issues would you want Government to prioritise in the next 3 years? Maximum 3 issues selected. 34% select as a top-3 issue.
23. Here and elsewhere when reporting agreement, reported percentages combine 'Agree strongly' and 'Agree slightly' response.
24. The FSA and FSS missions and remits differ - with the FSS holding much more responsibility around the promotion of public health via healthy eating.
25. FSA Research Evidence Database: This includes deep deliberative investigation of informed public views; innovative behaviour science and consumer psychology research; longitudinal tracking data of consumer behaviours, needs and views; and rapid response data on public needs in times of crisis.
26. TNS BMRB, Harris Interactive. Consumer research to inform the development of the FSA strategy 2015-2020. Food Standards Agency. 2014.
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29. Carr E. Food shortages could be permanent, warns industry body. BBC News. September 2021. ; Rivington M et al. UK food and nutrition security during and after the COVID-19 pandemic. Nutrition Bullet. 2021; 46(1): 88-97 ; McCabe S. How is Brexit impacting food shortages in Northern Ireland? Centre for Brexit Studies. 2021.
30. Smith M. How many people have been hit by the global supply chain crisis in Europe and the US? YouGov. December 2021.

31. Food Standards Agency, Ipsos Mori. Consumer Insights Tracker. November 2021.
32. Caddick D, Sterling A. Half Of Uk Families Are £110 Worse Off A Year Since 2019 General Election. New Economics Foundation. December 2021.
33. Office for National Statistics. Consumer price inflation, UK: December 2021. January 2022.
34. See for example Jack Monroe's recent Twitter thread exploring their lived impact of low-budget food price rises. Monroe J, @bootstrapcook. Twitter thread on cost of living & cost of inflation. January 2022. The Office of National Statistics (ONS) will be adjusting the way it tracks inflation for low-income families to reflect these kinds of disparities.
35. The Trussell Trust. End of Year Stats. December 2021.
36. Food Standards Agency, Ipsos Mori, Bright Harbour. The COVID-19 consumer research. Food Standards Agency. July 2021.
37. Food Standards Agency, Ipsos Mori. Consumer Insights Tracker. November 2021.
38. For example, during the qualitative research it became clear that concepts like 'trust and transparency' or 'regulation and communications' were deemed as lenses through which to view other issue areas - rather than areas of focus in their own right.
39. 16 key documents were reviewed and implications for our method, sample and materials were mapped, to ensure we built on existing data instead of repeating it.
40. 8 UK people reviewed the development of our approach and materials and vetted our participant care approach throughout the project lifecycle. The board included a mix of life-stages, ages, genders, ethnicities and household incomes. After a project onboarding session, we engaged with the board through a mixture of reviewing periods, group feedback sessions and 1-1 interviews. This helped us ensure the public had the opportunity to shape not just our findings, but our approach and questions for the research.
41. Our academic partner provided general support throughout the project design process, and reviewed and consulted on key materials and outputs (for example survey design, interim findings, food security investigations and final reporting). In

particular, support was provided in terms of developing our bespoke food insecurity measure, adapting USDA measures to also capture 'softer' measures of financial pressure and insecurity.

42. Fieldwork was conducted between 15th November and 17th December 2021. In total, the qualitative findings in this report were built from consumer data from a total of 218 completed online tasks and 60 hours of group workshop and depth interview data.

43. USDA Economic Research Service. Survey Tools: Six-Item Short Form of the Food Security Survey Module. United States Department of Agriculture.

44. In response to: ' I am financially comfortable and can afford to buy things I want without worrying about the cost': 39% disagree, 40% agree, with the remainder saying they 'neither agree nor disagree'.

45. Food Standards Agency & TNS BMRB. Our Food Future. Food Standards Agency. 2016; Food Standards Agency. Food we can trust: Food Standards Agency Strategic Plan 2015-20. Food Standards Agency. April 2015.

46. We have applied USDA definitions in this research when using the terms 'low' or 'very low' food security. Low food security: "Reports of reduced quality, variety, or desirability of diet. Little or no indication of reduced food intake." Very low food security: "Reports of multiple indications of disrupted eating patterns and reduced food intake." See USDA Economic Research Service. Definitions of Food Security. United States Department of Agriculture. for more detail about these definitions.

47. Festinger's 'cognitive dissonance' describes the feeling of discomfort we experience when we hold two conflicting thoughts, or when our behaviours and thoughts are out of alignment. This sense of discomfort often drives us to change our views or behaviour to promote alignment. However, in the case of food choices often there is no 'change' that can be made given price and other constraints - leading to sustained discomfort.

48. QX2. Which, if any, of the following have you experienced in relation to food in the past 12 months? - 35% selected "None", 65% selected one or more changes of behaviour.

49. See the following research from the Food Standards Agency: Food Standards Agency & Ipsos Mori. Consumer insights tracker. Food Standards Agency. November 2021; Ipsos Mori. Food and You 2 - Wave 2. Food Standards Agency. July 2021; Food Standards Agency, Ipsos Mori, Bright Harbour. The COVID-19 consumer research. Food Standards Agency. July 2021.

50. Connors C, Malan, L, Canavan S, Sissoko F, Carmo M, Sheppard C, Cook F. The lived experience of food insecurity under Covid-19. Bright Harbour and Food Standards Agency. 2020.

51. Bespoke food security classification model - see Technical Appendix

52. Based on responses to 'Qx2. Which, if any, of the following have you experienced in relation to food in the past 12 months?'

53. In the analysis detailed here, the term 'food secure' is used to describe collectively those people classified as having marginal food security, being at risk of insecurity or fully secure.

54. 15% in England, 9% in Wales, 9% in Northern Ireland, 13% in Scotland.

55. Based on responses to 'Q14b. Which do you trust for information about food (even if you don't use it for information at present)? (In Scotland: The Scottish Government / In Wales: The Welsh Government / In NI: The Northern Ireland Government)

56. While we do not have directly comparable figures from other surveys for trust in Government for information about food across the UK nations, the Scottish Government's Scottish Social Attitudes Survey (SSA) 2017 reported that '61% trusted the Scottish Government to work in Scotland's best interests compared to 20% for the UK Government' - this suggests the significant greater trust in the devolved Government observed in Scotland is genuine.

57. Lasko-Skinner R, Sweetland J. Food in a Pandemic. From Renew Normal: The People's Commission on Life After Covid-19. Demos. 2020: 57.

58. As indicated earlier, 65% have modified their food buying behaviour in the last 12 months as a result of worries over money / finance.

59. Including those with very low, low or marginal security.

60. See detailed data in Appendix A for Total UK, England/Wales/Northern Ireland combined, and Scotland.

61. Food Standards Agency, TNS BMRB. Messaging for food safety communications. Food Standards Agency. May 2014; Food Standards Agency, Kantar Public. Consumer perception of food risk. Food Standards Agency. 2021.

62. Food Standards Agency, Ipsos Mori, Bright Harbour. The COVID-19 consumer research. Food Standards Agency. July 2021.

63. These 8 factors were: Food safety and hygiene; Health and nutrition; Environment and animal welfare; Price / Value; Quality; Convenience and ease; Local provenance; 'Ethics and workers welfare. Each factor was accompanied by a short description on-screen, please see Technical Appendix for more detail.

64. Community Research & 2CV. Trust in a Changing World. Food Standards Agency. 2018; Kantar Public. Consumer Perceptions of Food Risks. Food Standards Agency. 2017.

65. 78% agree strongly or agree slightly with: "I trust that the places I eat or buy from are handling food safely and hygienically" (N.B. if we include those saying "Neither agree nor disagree", the proportion is 95%.

66. 79% agree strongly or agree slightly with: "I trust that the foods sold in shops are made and stored according to good food safety standards" (N.B. if we include those saying "Neither agree nor disagree", the proportion is 94% - this is similar to the 90% of people in Food And You 3 who were "very" or "fairly" confident that "the food you buy is safe to eat"; Ipsos Mori. Food and You 2 - Wave 3. Food Standards Agency. January 2022.

67. Community Research & 2CV. Trust in a Changing World. Food Standards Agency. 2018.

68. Food Standards Agency, TNS BMRB. Our Food Future. Food Standards Agency, Food Standards Scotland, Sciencewise. 2016.

69. Food Standards Agency, TNS BMRB. Our Food Future. Food Standards Agency, Food Standards Scotland, Sciencewise. 2016.

70. There was a significant difference in participants reporting that they check the dates on food products to make sure they buy food with the freshest, longest dates possible (87% percent food secure, 83% food insecure).
71. Defined as having very low or low or marginal food security.
72. Proportion of quantitative participants who agreed strongly or agreed slightly with 'I am concerned that the way allergens are labelled on food packs is unclear'
73. See detailed data in Appendix A for Total UK, England/Wales/Northern Ireland combined, and Scotland.
74. All figures cited in this paragraph are based on the proportion of people who agree strongly or agree slightly with the statements mentioned.
75. Based on % people reporting being 'extremely concerned' or 'quite concerned' about the impact of climate change on food production.
76. Proportion who agree strongly or agree slightly with 'I feel that profit has become more important to the food industry than people's needs'.
77. Proportion who agree strongly or agree slightly with 'I find it unacceptable to throw food away at home'.
78. Proportion who agree strongly or agree slightly with 'I try to reduce or avoid food products that create plastic waste''.
79. Not statistically significant but directionally more prevalent than in England and Wales.
80. Food Standards Agency, TNS BMRB. Our Food Future. Food Standards Agency, Food Standards Scotland, Sciencewise. 2016.
81. Based on responses to 'Q19a. Thinking about the next 3 years, which of these issues, if any, do you see as important to you for the future of food?'
82. See also table in appendix
83. See detailed data in Appendix A for Total UK, England/Wales/Northern Ireland combined, and Scotland.
84. Proportion who agree strongly or agree slightly with 'I avoid buying foods that contain ingredients such as trans fats / palm oil / preservatives / E numbers'.

85. Proportion who agree strongly or agree slightly with 'I feel supermarkets encourage me to buy unhealthy foods'

86. Proportion who agree strongly or agree slightly with 'I often feel that foods labelled as 'healthier options' (for example, low fat, low sugar, plant-based meat alternatives) are unhealthy in other ways'

87. Proportion who agree strongly or agree slightly with 'I find it difficult to really understand what a product contains'

88. All based on proportion who agree strongly or agree slightly with these dimensions.

89. Defined as those having very low, low or marginal food security. See Technical Appendix for further information on the food security classification.

90. See Chronic Illness Inclusion for more information.

91. See for example Kedor C et al. Chronic COVID-19 Syndrome and Chronic Fatigue Syndrome (ME/CFS) following the first pandemic wave in Germany - a first analysis of a prospective observational study. Cold Spring Harbor Laboratory Press. February 2021; Davis H et al. Characterizing long COVID in an international cohort: 7 months of symptoms and their impact. eClinicalMedicine. 2021; 38; Wong T & Weitzer D. Long COVID and Myalgic Encephalomyelitis/Chronic Fatigue Syndrome (ME/CFS)—A Systemic Review and Comparison of Clinical Presentation and Symptomatology. Medicina. 2021; 57(5): 418.

92. 61% agree with 'I often feel that foods labelled as 'healthier options' (for example, low fat, low sugar, plant-based meat alternatives) are unhealthy in other ways'.

93. See detailed data in Appendix A for Total UK, England/Wales/Northern Ireland combined, and Scotland.

94. See detailed UK figures in Appendix A: Table 1; EWNI figures in Table 2; Scotland figures in Table 3.

95. "Government" was intentionally not defined further, as the purpose was to establish what respondents saw as falling broadly under the remit of the state (whatever the level or agency involved) versus the remit of private industry.

96. See detailed UK figures in Table 1; EWNI figures in Table 2; Scotland figures in Table 3.

97. Index calculation: (% people selecting a topic in top 3 at Q19b)/(% people expressing an interest in this topic at all at Q19a)

98. The proportion selecting this aspect as a priority area in Scotland (45%) is statistically significantly higher than the 40% observed overall in EWNI.

99. The proportion selecting this aspect as a priority area in Scotland (43%) is statistically significantly higher than the 39% observed overall in EWNI.

100. The proportion selecting this aspect as a priority area in Scotland (40%) is statistically significantly higher than the 36% observed overall in EWNI.