



## Confrontation or co-ordination: joining up the food chain

Consumers: the most important link in the food chain

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# Consumers: the most important link in the food chain



- **Current challenges**
- **Consumer expectations**
- **Policy implications**

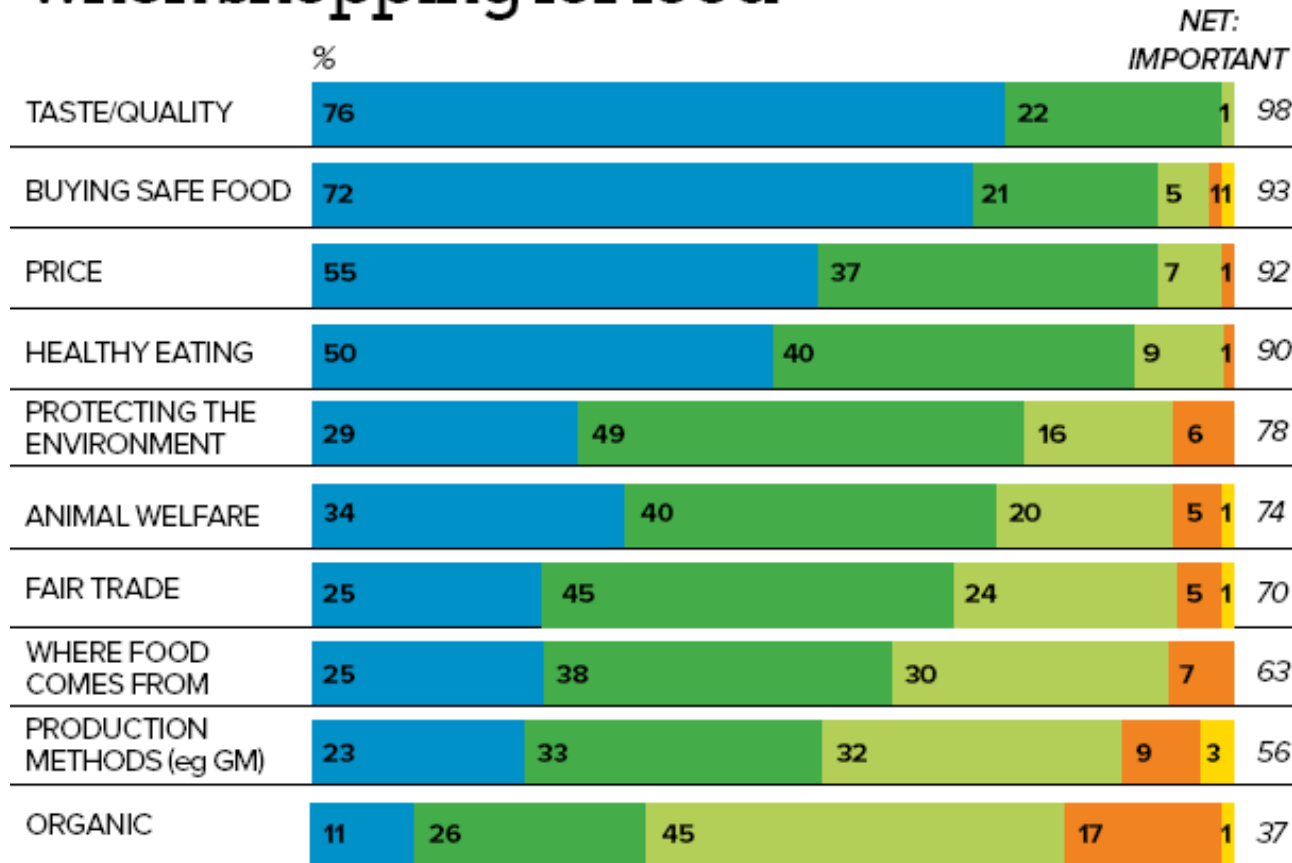
# Current challenges



- Rising and volatile food prices.
- Around a quarter of the population are obese and diet-related diseases are the major killers.
- Food security and sustainability - understanding how to produce more with less.
- Improving food safety.
- Ensuring consumer acceptability and meaningful choice.

# Consumer expectations

# Importance of different factors when shopping for food



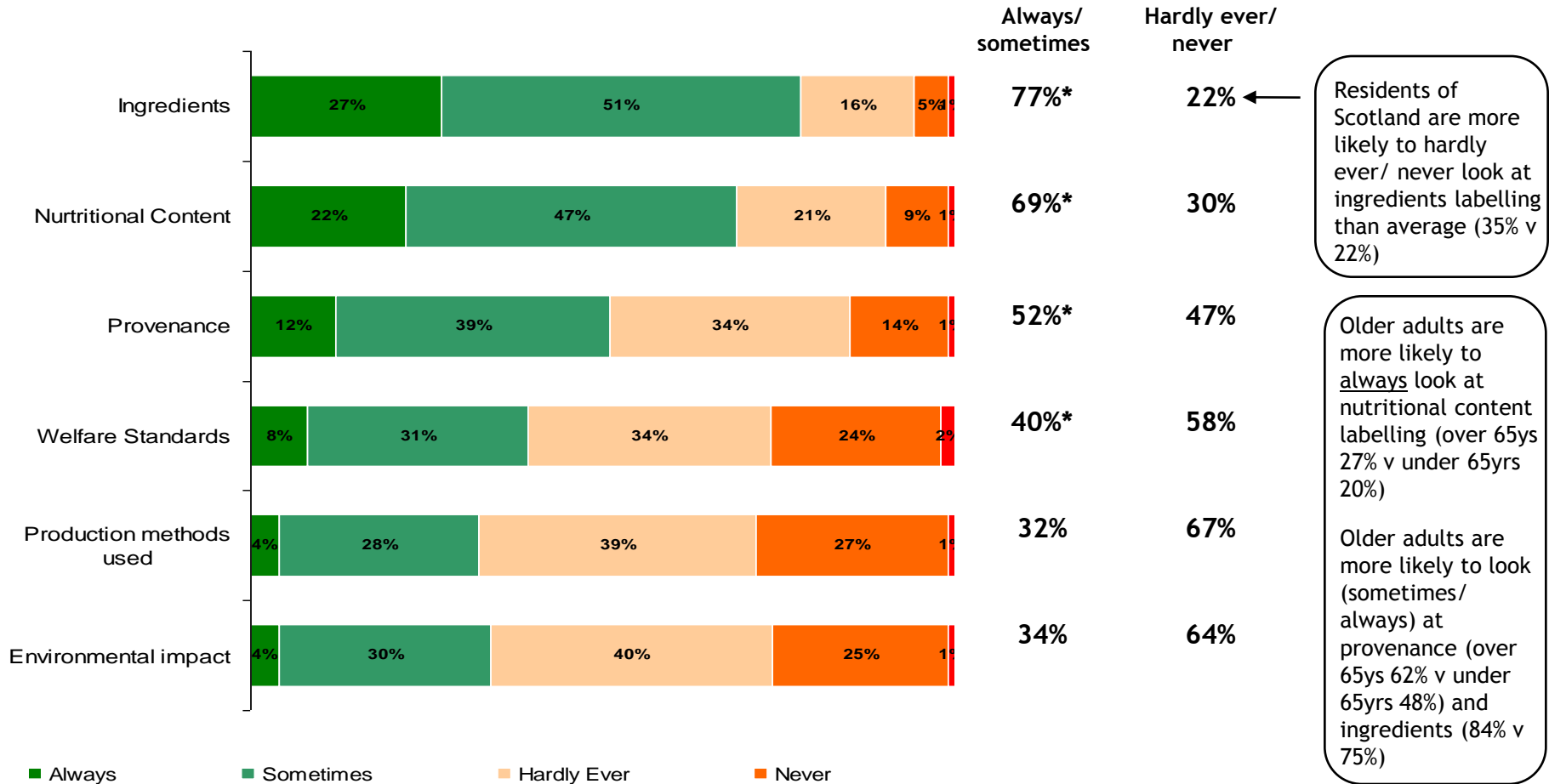
■ VERY IMPORTANT  
 ■ FAIRLY IMPORTANT  
 ■ NOT VERY IMPORTANT  
■ NOT AT ALL IMPORTANT  
 ■ DON'T KNOW

When shopping for food, how important would you say the following issues are to you when choosing what to buy  
 (Base all shopping for groceries at least once a month n = 854)

# The majority of people are interested in what they are eating.



Three quarters (77%) look at the ingredients on packaging & 7 in 10 (69%) look at nutritional content at least sometimes - June 2011 Which? survey (general public, online).



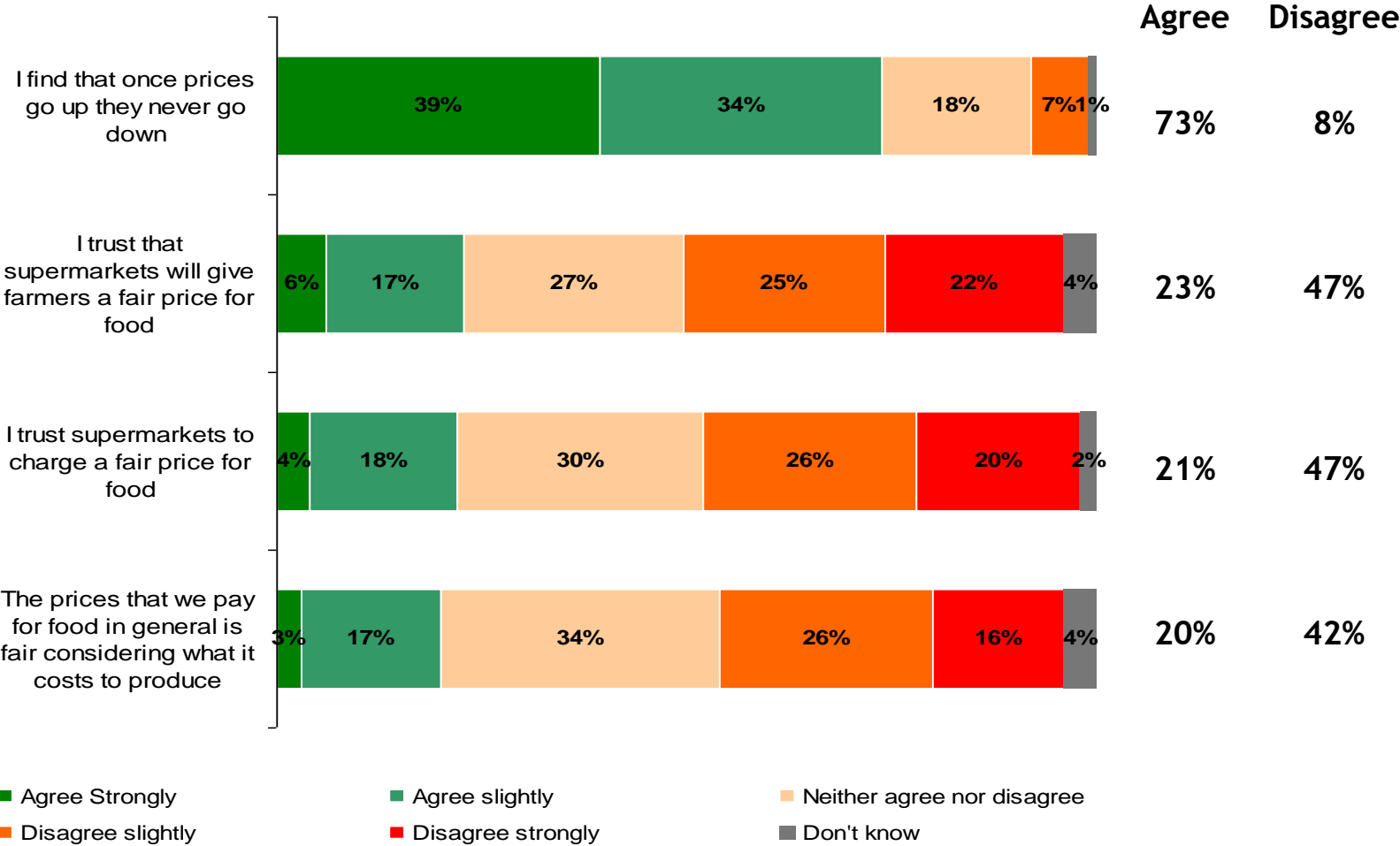
# Increased importance of price



A Which? on-line survey of 1009 members of the British public weighted to be representative of the population, June 2011.

- **92 per cent** have noticed an increase in food prices over the last 12 months.
- **84 per cent** are worried about food prices increasing over the next 12 months.
- People are relying on and checking the value of special offers and looking for reduced price food more often than they were in June 2010.
- People are trading down: **41 per cent** say they are buying more supermarket economy brands; **34 per cent** less supermarket own-brand premium and **31 per cent** less organic.
- **55 per cent** think that higher prices make it more difficult to eat healthily.
- Reasons for price rises are complex and price transmission along supply chains is not transparent.
- Which? is campaigning to make it easier to compare prices through clearer unit pricing.

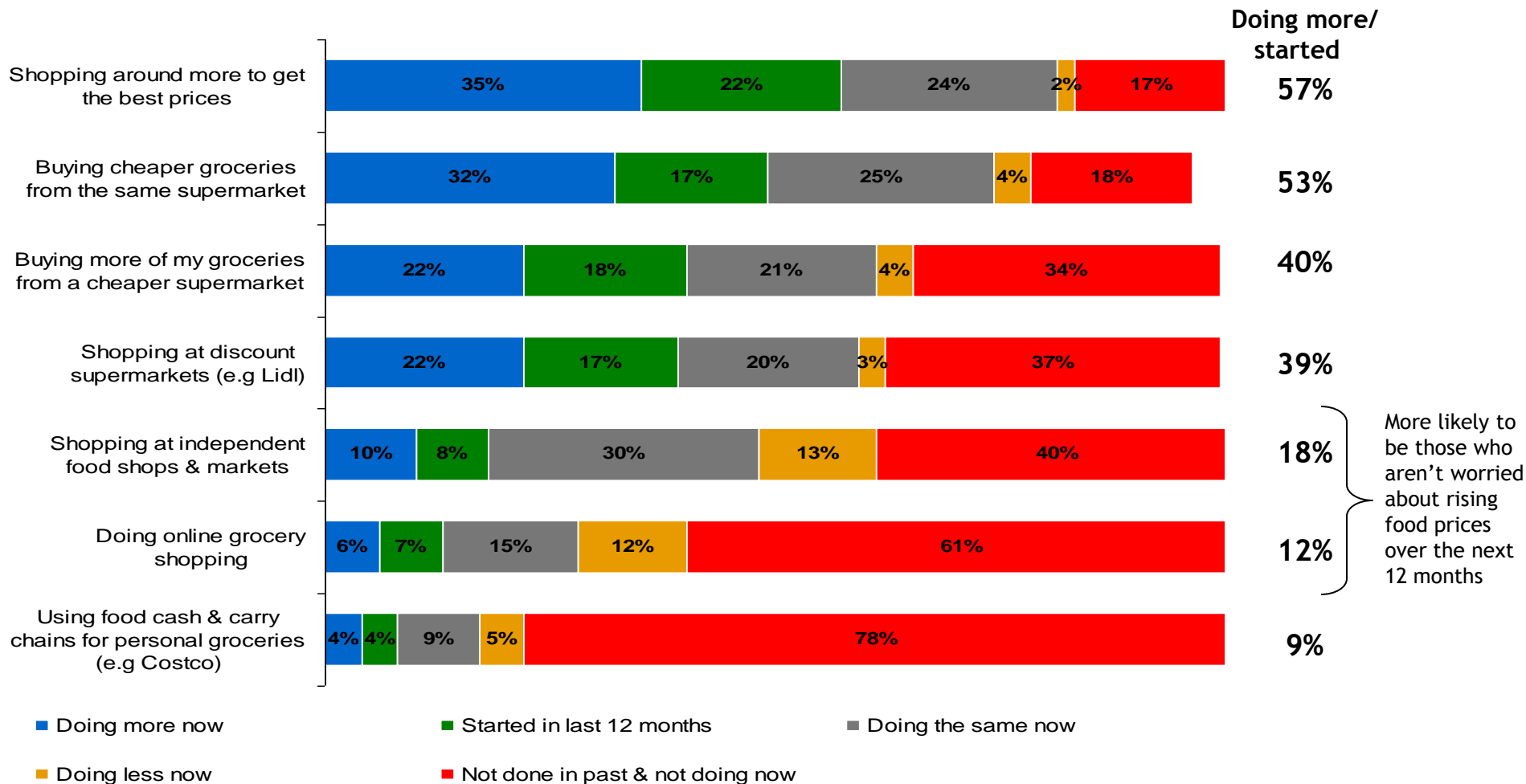
# Around half of consumers feel they are being treated unfairly when it comes to the cost of food.



# People are changing where they are shopping.



6 in 10 have started, or increased their shopping around, in order to get the best prices.



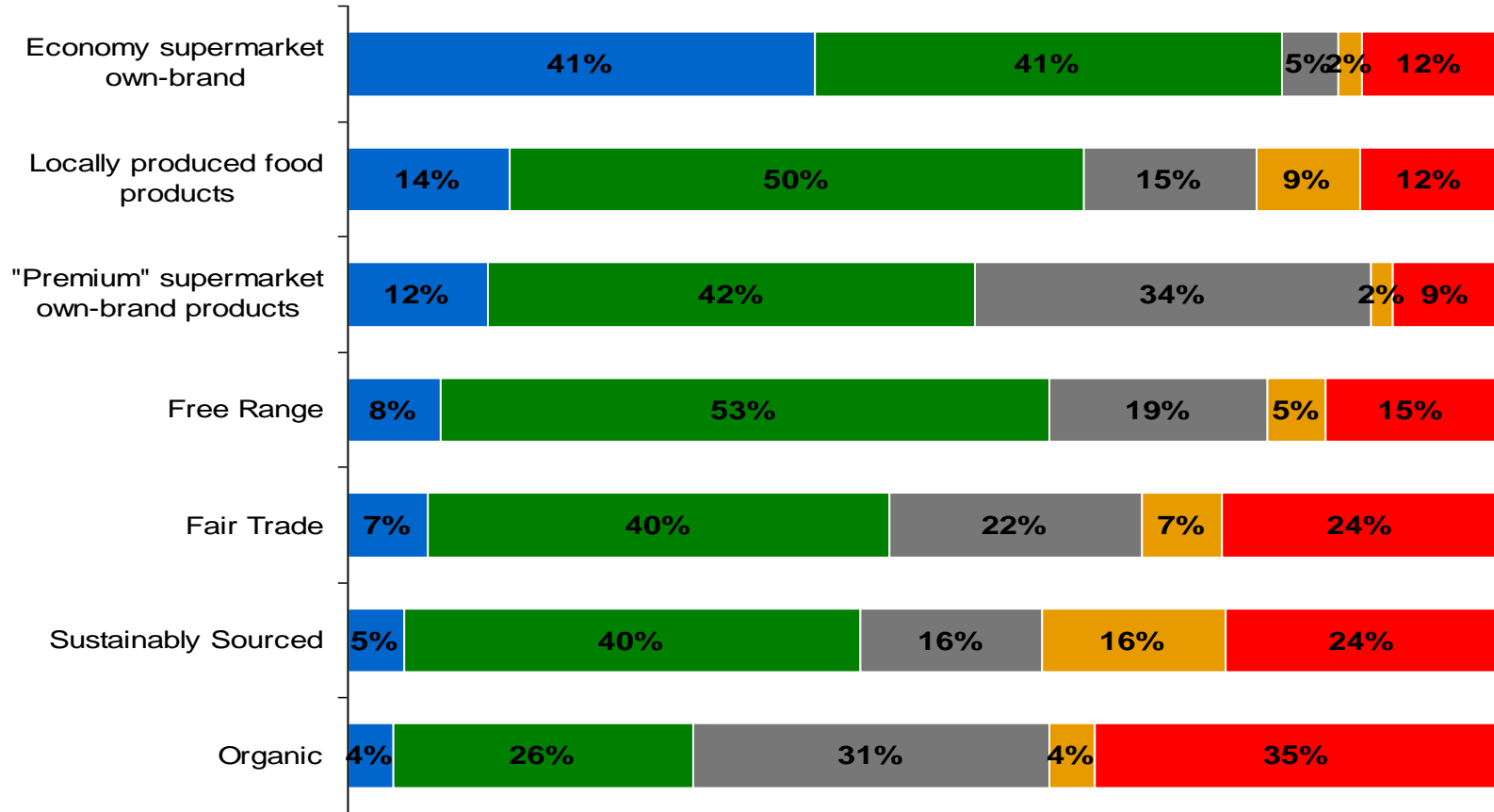
Due to the economic climate have you changed your habits in any of the following ways regarding where you do your food shopping, compared to 12 months ago? Base: All main/ joint grocery shoppers (1004)

3 January, 2012

# People are changing what they are buying.



4 in 10 shoppers are buying economy supermarket own range more now than 12 months ago and a third are buying less “premium” ranges.



■ Doing more now ■ Doing same ■ Doing less ■ Don't know ■ N/A- don't currently & haven't in the past bought

Thinking about the following types of products, how regularly do you purchase them now,

3 January, 2012

compared to 12 months ago? Base: All main/ joint grocery shoppers (1004)

## CHANGES TO MEAT AND MEAT PRODUCTS BOUGHT OVER 12 MONTHS

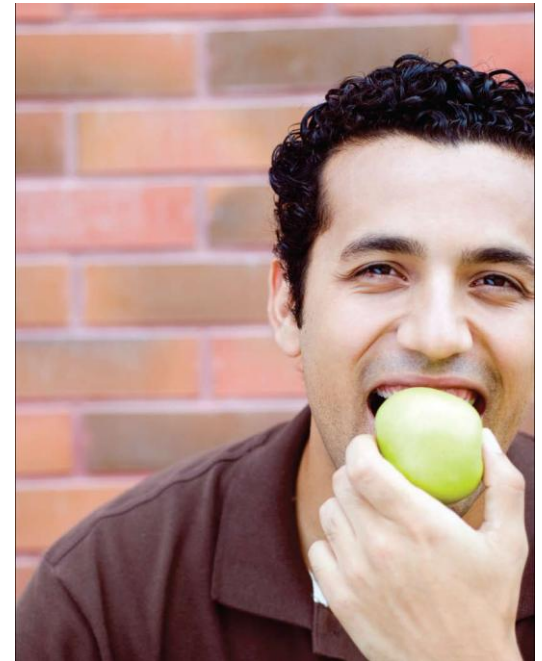
	MORE LIKELY	LESS LIKELY
FROM DISCOUNT SUPERMARKETS	31%	14%
VALUE BRAND	30%	16%
FROZEN	29%	14%
UK PRODUCED	25%	11%
FROM INDEPENDENT BUTCHERS/ FARMERS MARKETS	21%	26%
TINNED	15%	19%
FARM ASSURED	14%	22%
FREE RANGE	11%	32%
FROM PREMIUM SUPERMARKETS	10%	42%
ORGANIC	6%	38%

(Thinking specifically about meat products, due to the economic climate, would you be more or less likely to buy the following compared to 12 months ago? Base: All main/ joint grocery shoppers (1004)

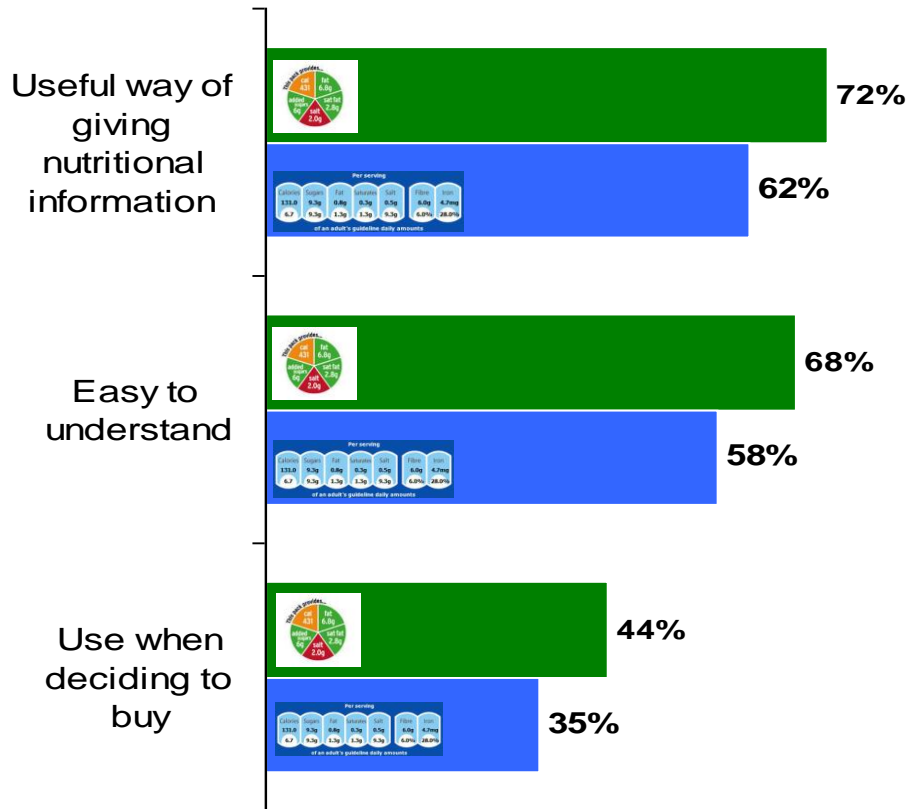
# Making healthier choices easier



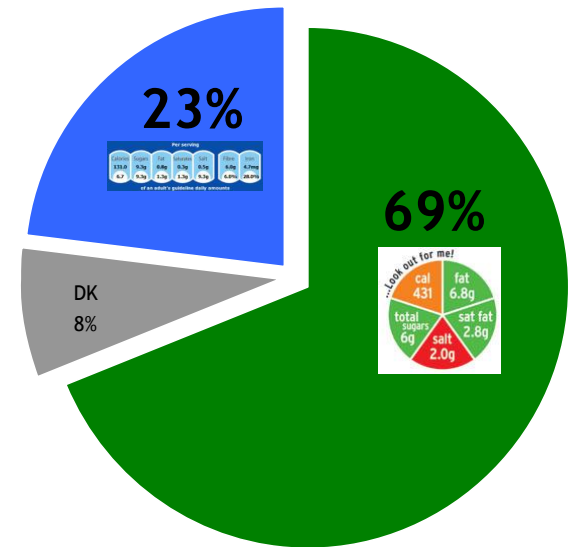
- **Made a start on some issues, but need to go further:**
  - Consistent nutrition labelling with traffic light colour coding
  - Calorie information in chain restaurants
  - More responsible food marketing to children
  - Further reductions to salt, saturated fat and calorie levels where feasible
  - Using price promotions and other financial incentives
  - Improving the food offered in public institutions
  - Ensuring genuine health claims are made about foods



# Traffic Light Labelling: opinion survey backed up independent research that it performs better on format and ease.

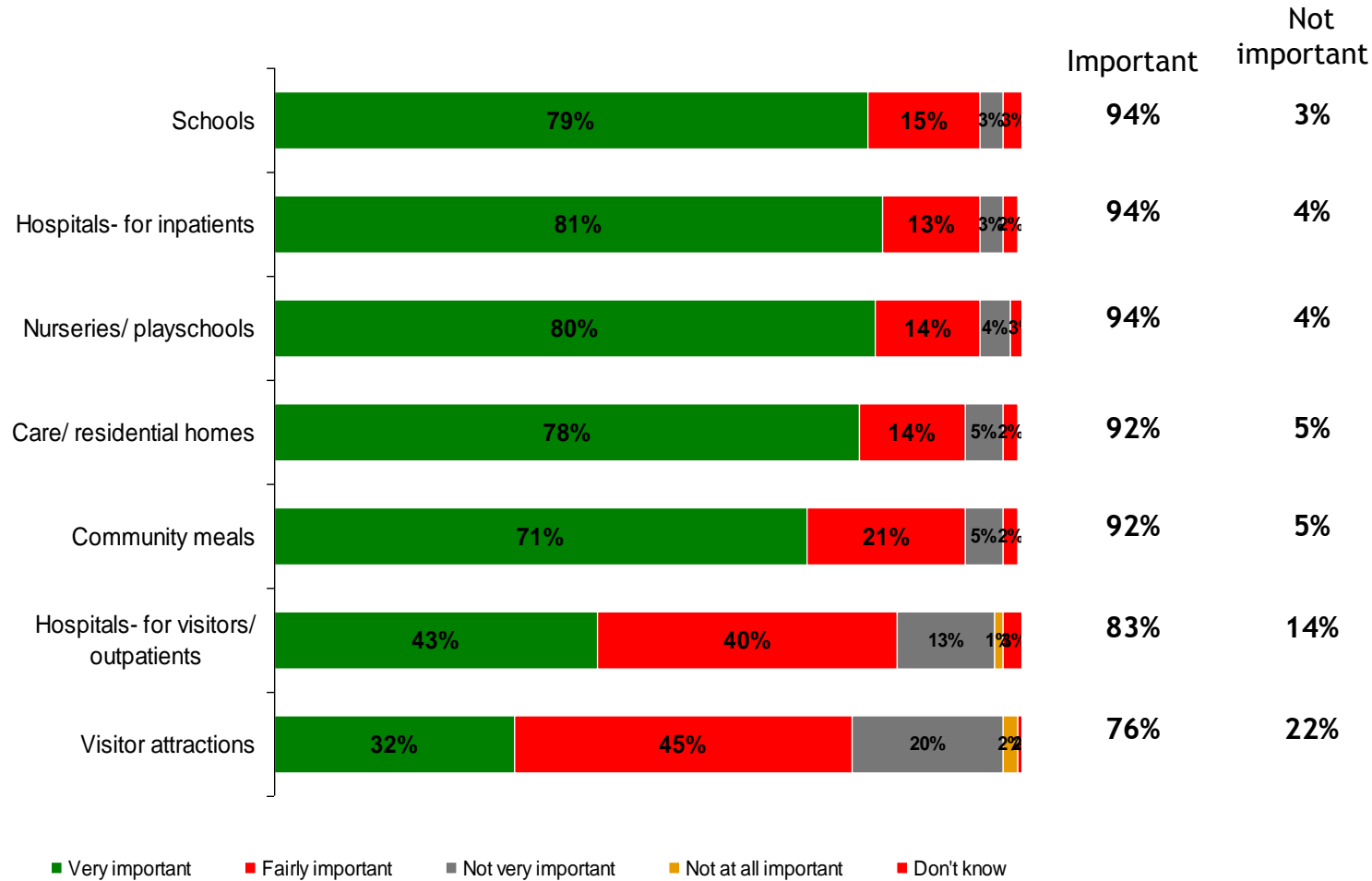


And when asked directly which is easiest to understand, 7 in 10 said Traffic Light labelling.



To what extent, if at all, do you agree with the following statements ...I use traffic light labels/ GDD labels when deciding what food to buy. I think traffic light labels/ GDA labels are easy to understand. I think traffic light labels/ GDA labels are easy to understand. [See appendix 3 for full chart.](#) Base: All who replied to survey (1009). Q24. Which do you think is easiest to understand? Base: All who have seen nutritional labels (973)

Nearly everyone thinks it's important to have to have standards to ensure that healthy food is provided in key public institutions.



# Producing more with less

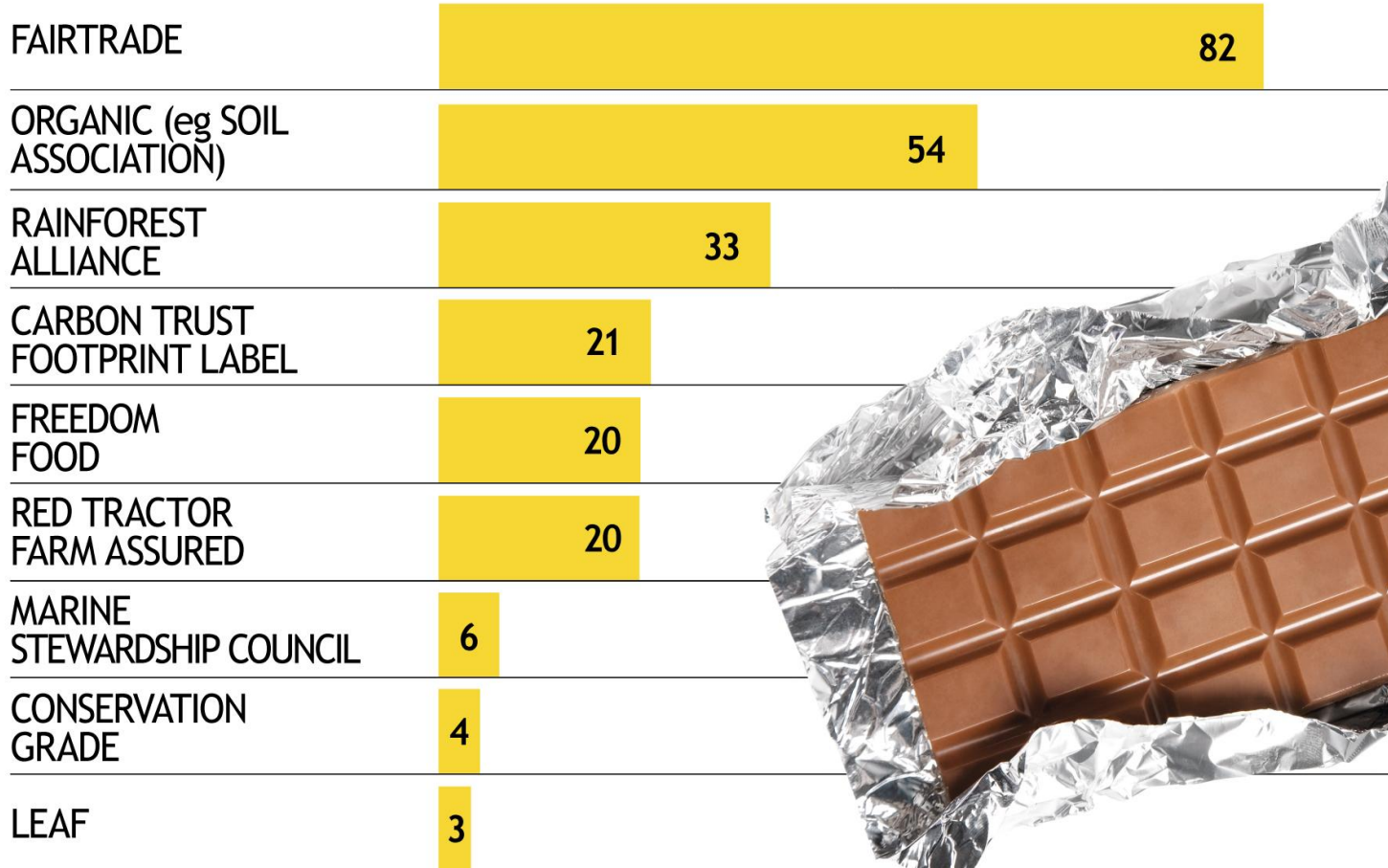


## Attitudes towards environmental and ethical choices

(Which? research 2010, qualitative hall test and focus groups, survey of general public)

- A lot of confusion and even more motivated consumers struggled.
- A lack of awareness of broader environmental impacts.
- Sustainability issues come below key overall issues such as taste and quality, food safety, price and healthy eating for food shoppers.
- But 3 in 4 still feel that ‘protecting the environment’ is an important issue when choosing what to buy.
- Shoppers from lower social groups generally attach less importance to sustainability issues when choosing foods (and more importance to price).
- Greater importance is attached to healthier eating and the environmental impact of food choices as you move South.

# Prompted awareness of different labelling schemes



Before today, which, if any of the following food labelling schemes had you heard of?  
(Base: all shopping for groceries once a month or more n=854)

# Making choices easy



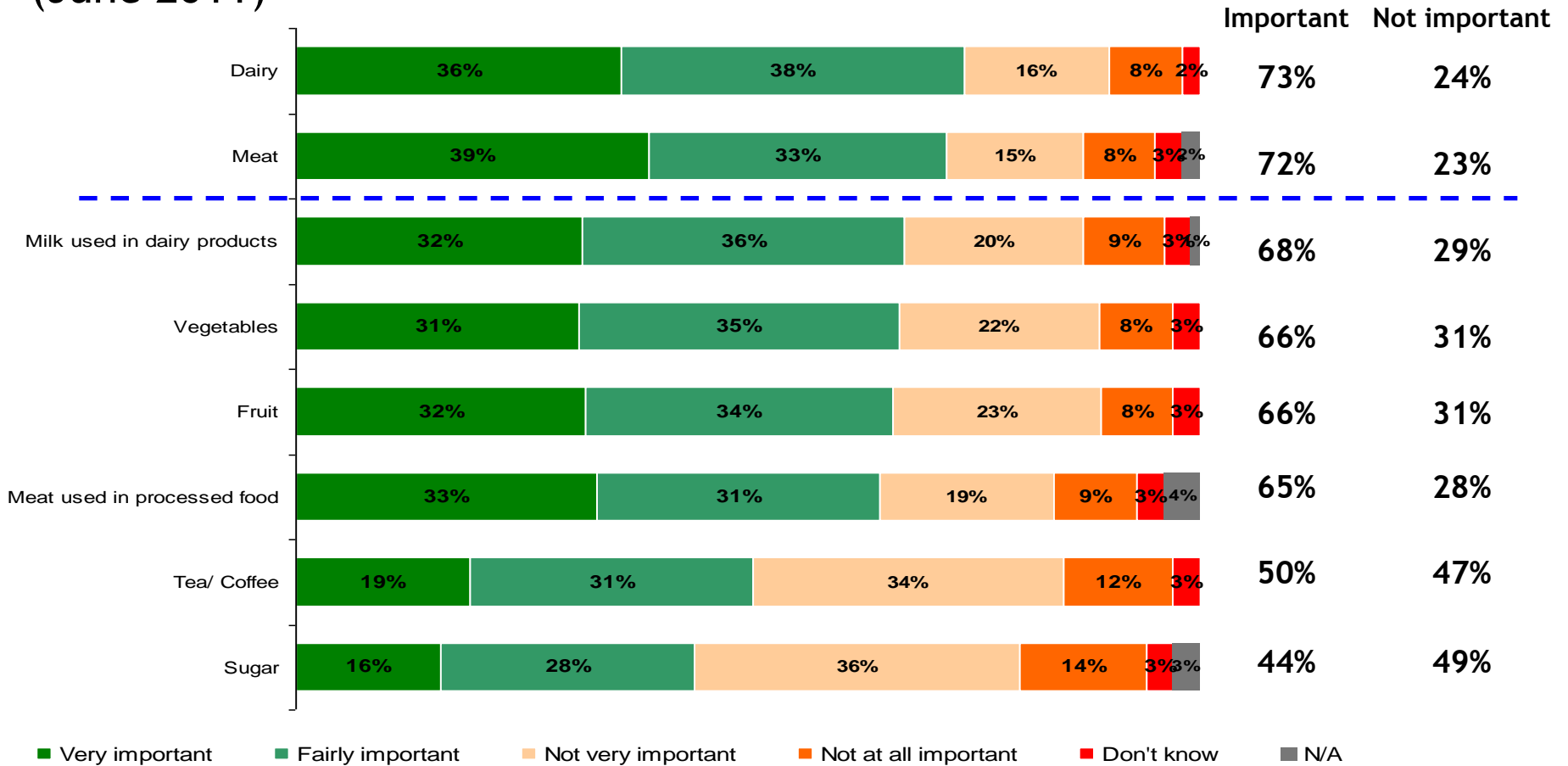
- 7 in 10 said that they would pay more attention to the environmental impact of the foods they buy if labels were clearer.
- This was reinforced by respondents in our qualitative research:
  - *“I tend to do my shopping on the basis of what I can see, rather than having to pick up all of the items and search for labels.”* (Female, younger family group)
  - *“I’m actually quite open to this. The government just needs to promote it. I’ve bought that bread millions of times, but the footprint is just lost in a sea of information. I think that once you know about it you’d actually look for it though.”* (Male, younger family, hall test)
  - *“We come from a generation that if it’s easy for us to do then we do it.”* (Female, younger family group)



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# Importance of origin

The majority of people want to see provenance labelling on dairy and meat especially, but also fruit and vegetables (June 2011)



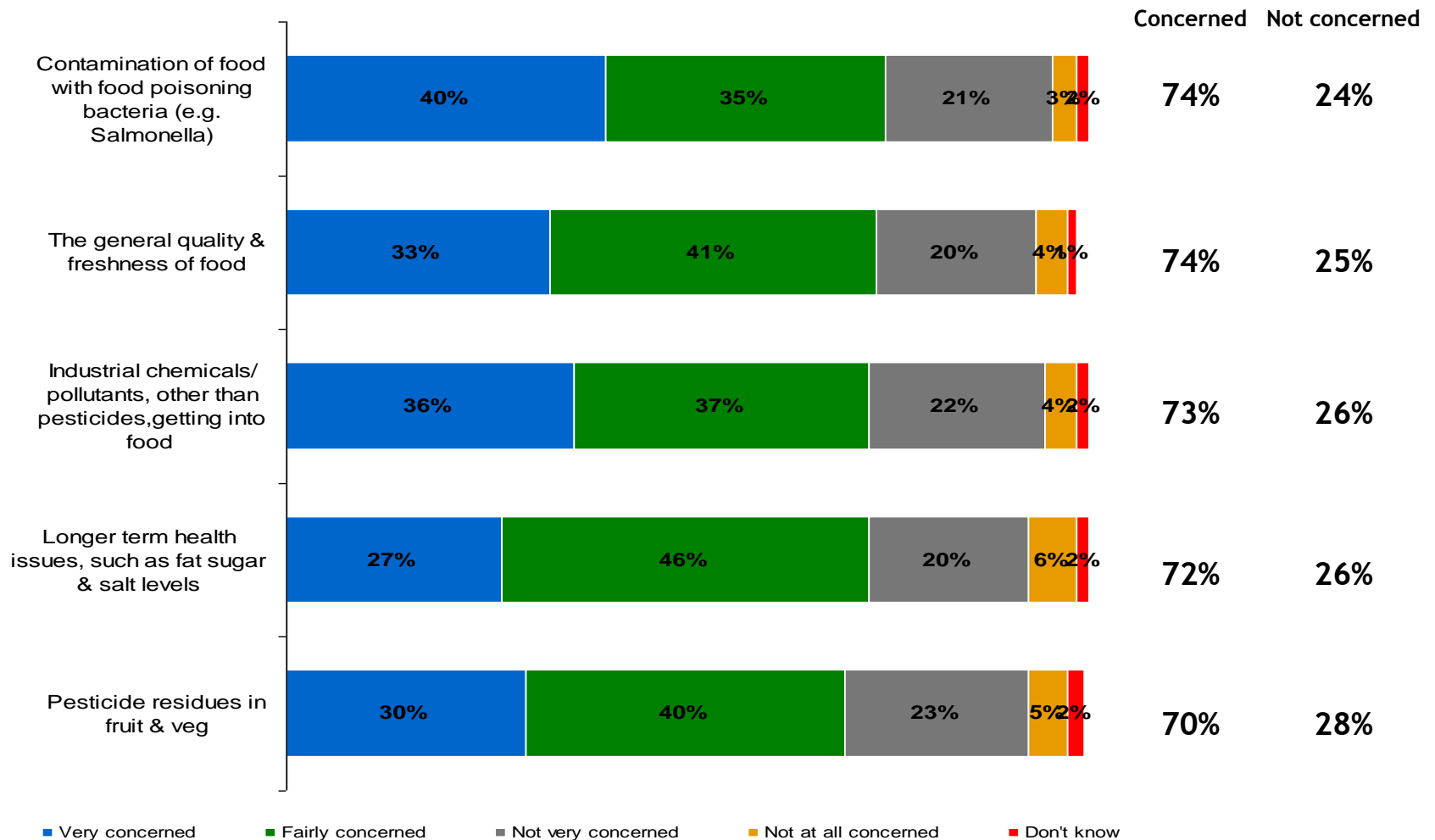
Older adults think it is more important to have origin info on dairy, meat, fruit & veg than younger adults.

How important is it to you that country of origin information is labelled on packaging on the following foods? Base: All who responded to survey (1009)

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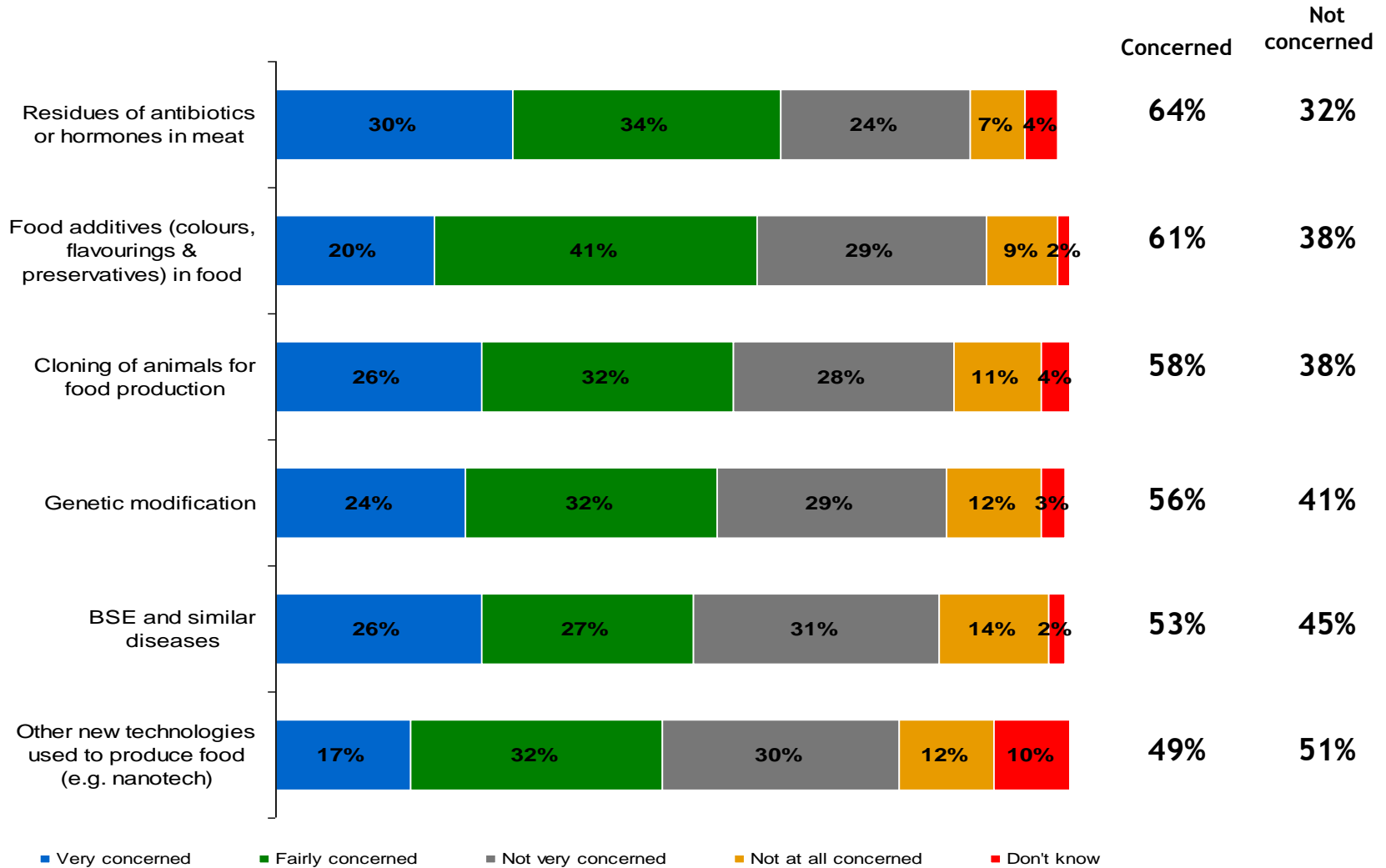
# Improving food safety

## Issues of most concern (February 2011)



Thinking about food safety, how concerned are you, if at all, about each of the following issues? Base: All who responded to survey (1406) 3 January 2012

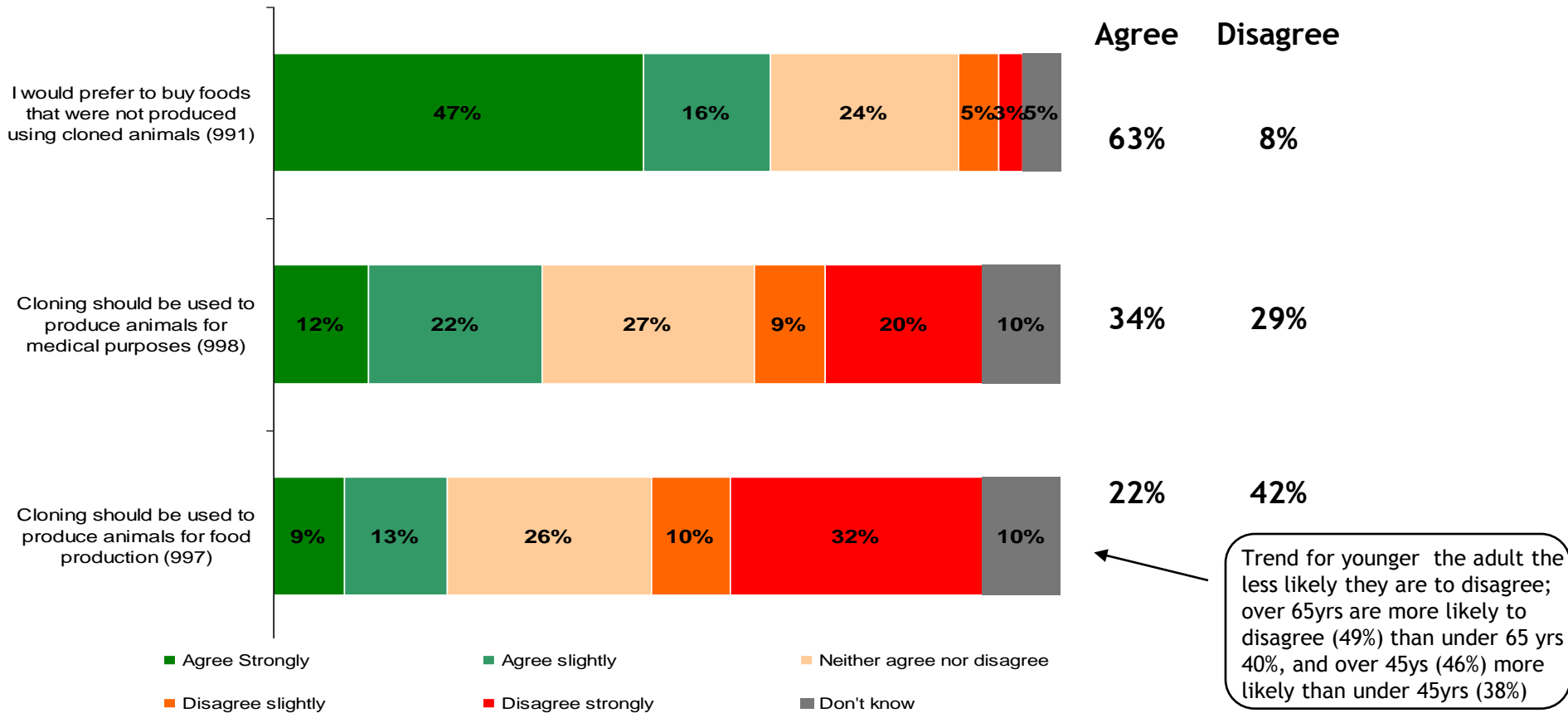
# Food safety issues of most concern



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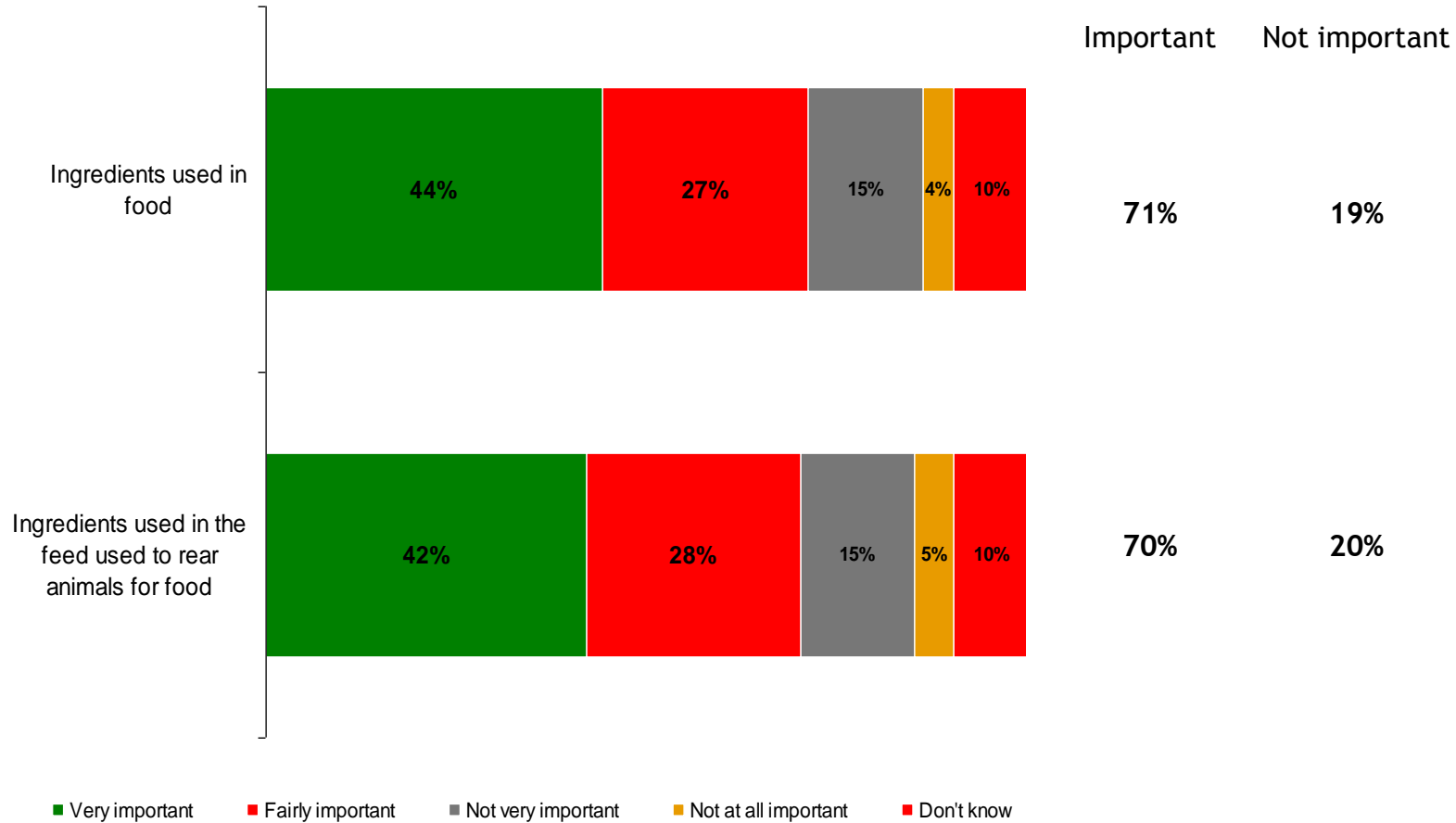
# Ensuring consumer acceptability and meaningful choice (June 2011)

Around 3 in 5 people would prefer to buy food that was not produced using cloned animals.



To what extent do you agree or disagree with the following statements? Base: all who responded to survey, excluding N/A (sample sizes in brackets)

The majority of people think it's important that retailers have policies not allowing GM in ingredients used in food, or in feed of animals.



## Foresight:

*‘Food production and the food system must assume a much higher priority in political agenda across the world. To address the unprecedented challenges that lie ahead the food system need to change more radically in the coming decades than ever before, including during the industrial and green revolutions’.*

- Reorganisation of policy responsibilities across government - greater fragmentation, less transparency and less focus on consumer interests.
- Agriculture policy (eg. CAP) still continues to be developed in isolation from wider consumer and public health priorities.
- The challenges the food chain and consumers face present synergies but also require trade-offs, but there is no over-arching food strategy (eg. health, environment, welfare).
- Sustainable intensification is being looked at (Defra Green Food project) but has to be in line with consumer expectations, eg. acceptability of different types of production.
- Deregulation agenda (eg. meat controls) must take account of long-term as well as short-term costs.

# A joined up approach



- Enormous challenges we face require action across the supply chain.
- Need to have a wider and more open debate about the trade-offs that we face and what are people's priorities and 'non-negotiables' when it comes to food choices.
- Debates about increasing food production cannot take place in isolation.
- Failure to address consumer issues at the outset can result in rejection.
- Enormous opportunities in responding to consumers' demands.
- Greater transparency around food prices is needed to help mitigate the impact eg. on ability to make healthier choices.
- Efforts to tackle obesity and diet-related disease need to be reinvigorated with greater Government leadership.
- Need to have a cross-cutting food strategy and a joined up approach to food policy.

