



FLEETWOOD
STRATEGY

**National
Food
Strategy**

NATIONAL FOOD STRATEGY QUANTITATIVE RESEARCH REPORT

June 2021

Methodology

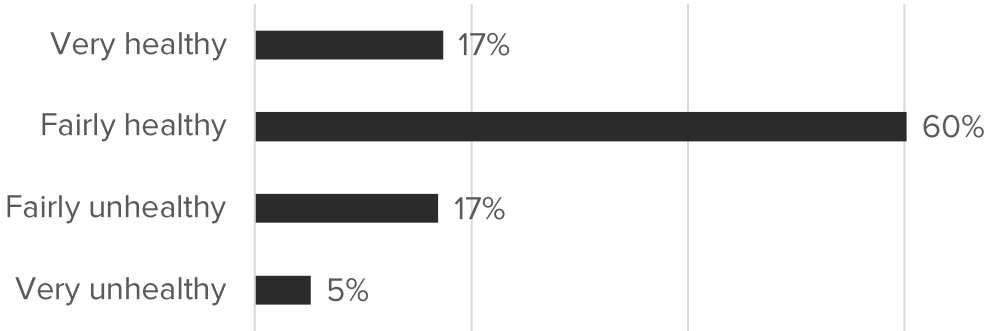
- Three online focus groups were conducted between 7 June 2021.
- The results of these focus groups were used to inform this quantitative survey.
- Survey completed between 11 – 12 June 2021.
- Online poll of n=2,000 respondents living in Great Britain
- Nationally representative of GB residents with quotas set by region, gender, age and education with minimal weighting applied where necessary
- Poll of n=2,000 has a margin of error of +/- 2.2% at a 95% confidence interval.



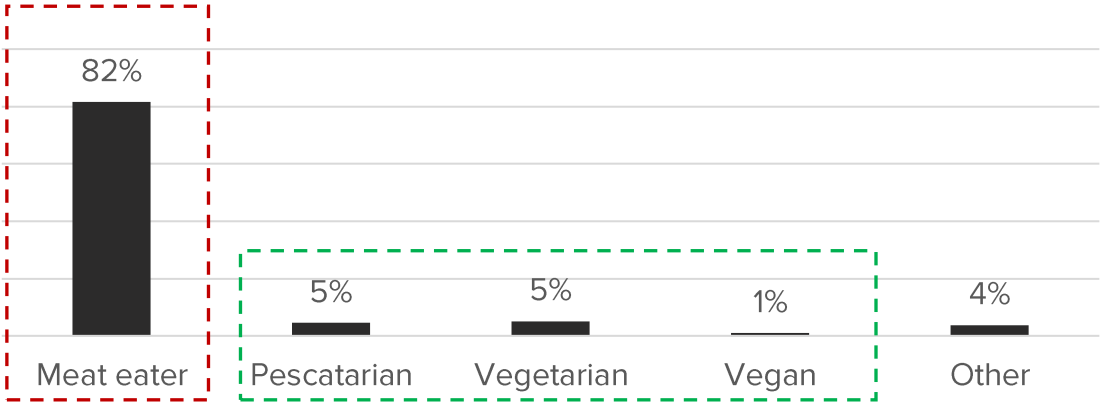
Context

Health and Diet

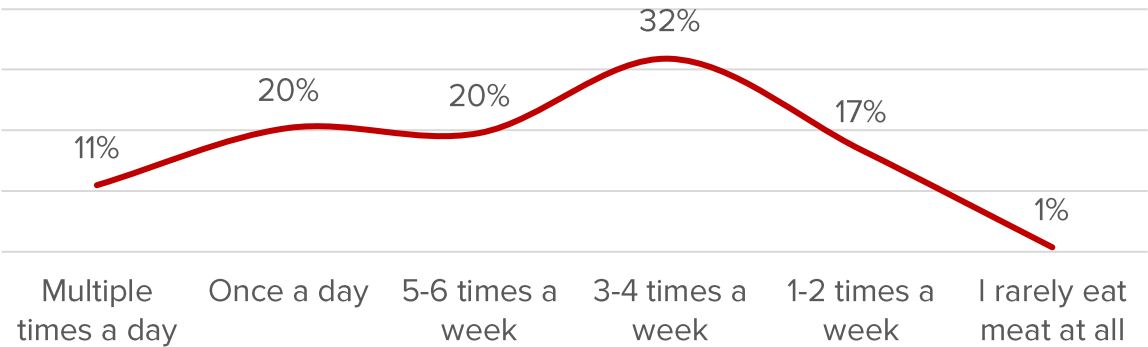
Personal Health



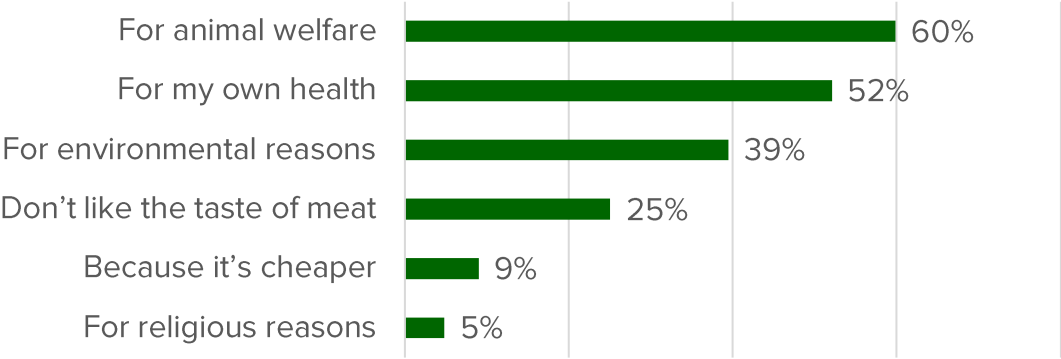
Diet



Meat Eating Frequency



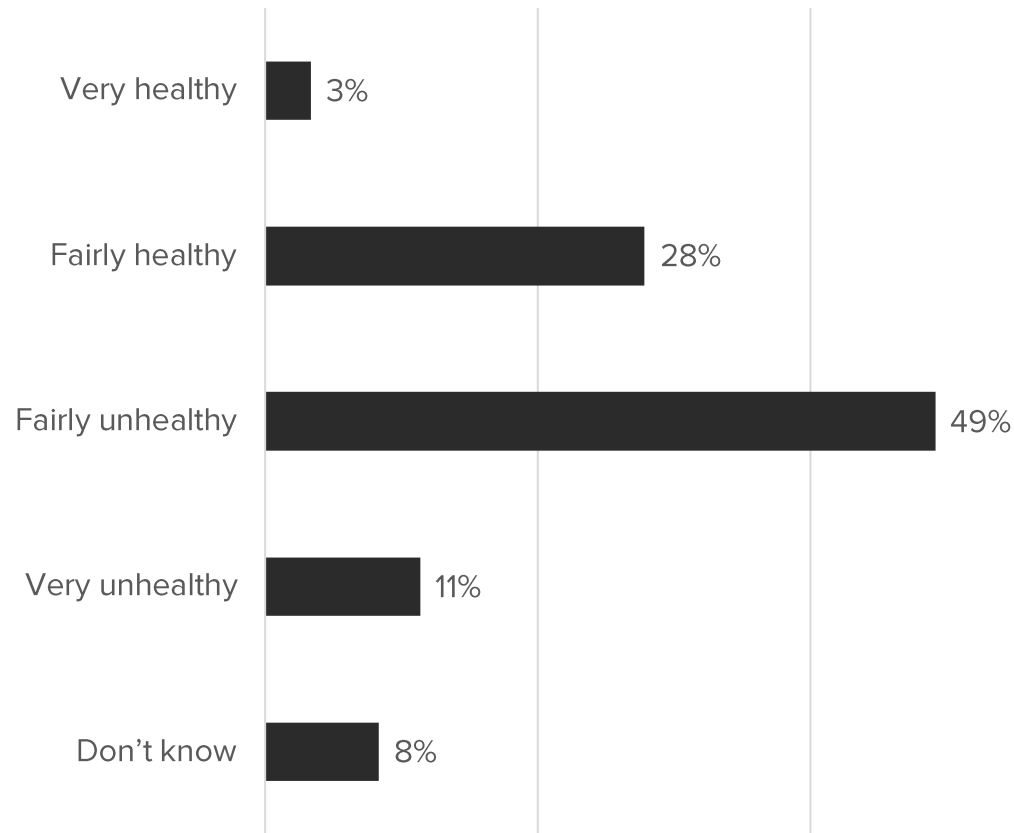
Reasons Not to Eat Meat



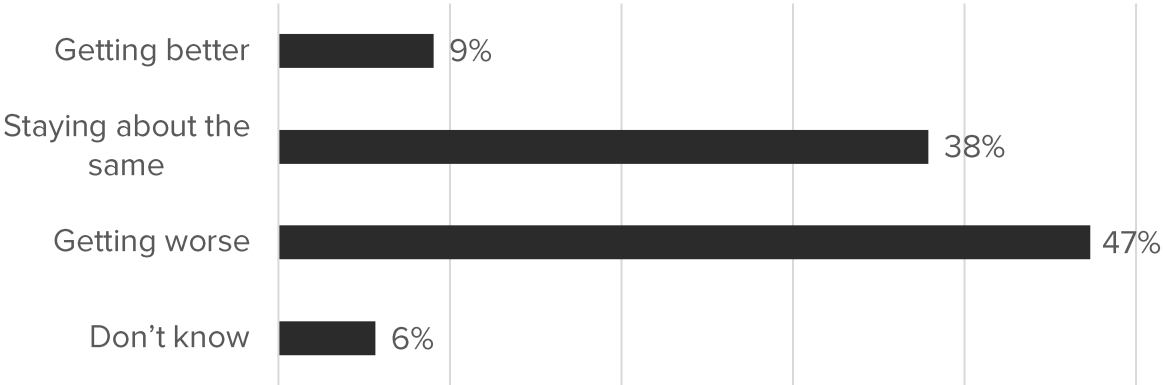
Q) How would you describe your own health?
Q) Which of the following best describes your diet?
Q) You indicated that you're a non meat-eater out of the following options, which ones best describe why you follow that diet? BASE = Non meat-eaters
Q) In a normal week, how often do you eat meat? BASE = Meat eaters

UK Healthiness

UK's Health



Direction of UK Health

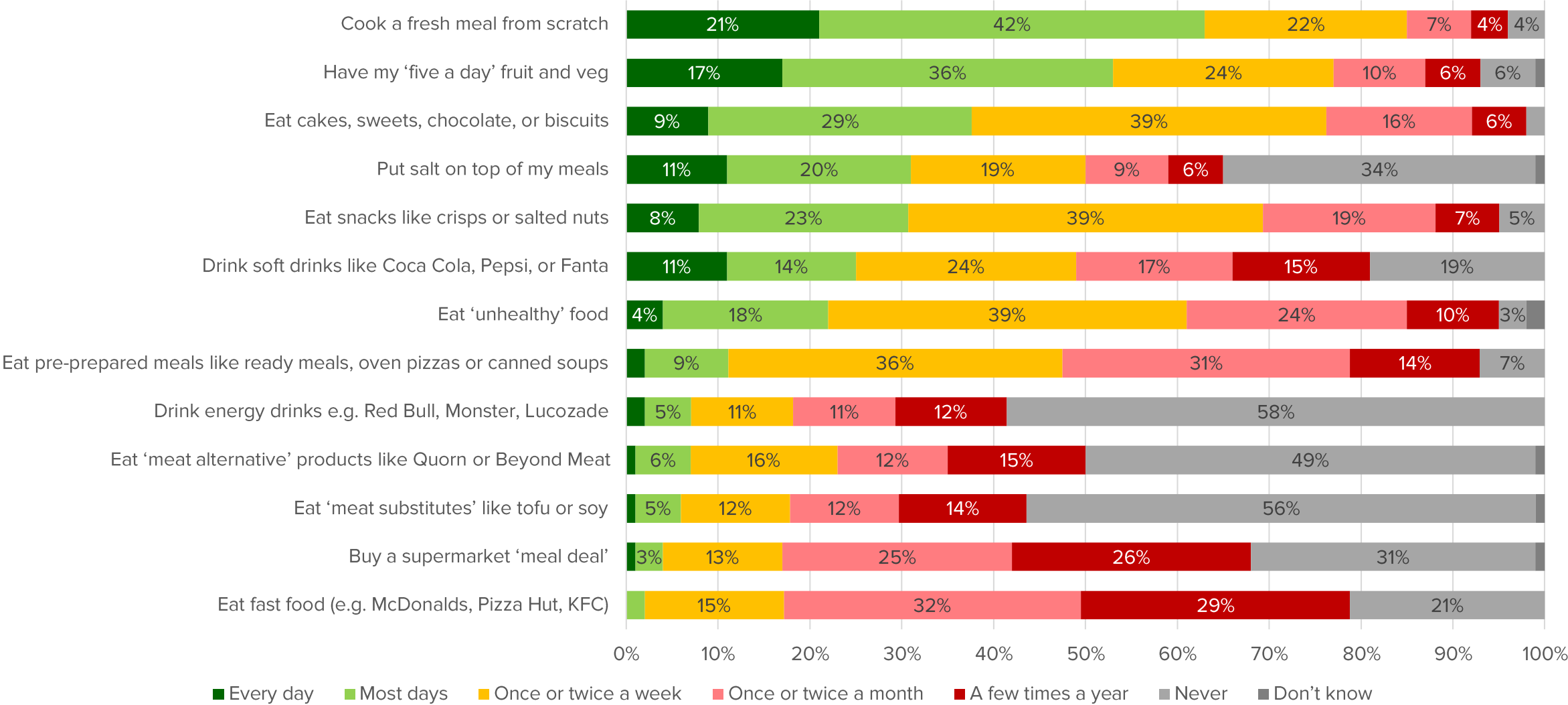


“People are trashing the NHS through eating. We all eat and drink too much.”

“I think a lot of people struggle to get healthy food once you focus on the bills you can’t avoid. It’s so hard to live a normal life.”

Q) Would you say that the UK population is generally healthy or unhealthy compared to other countries?
 Q) And would you say that in general, the health of people living in the UK is getting better or getting worse?

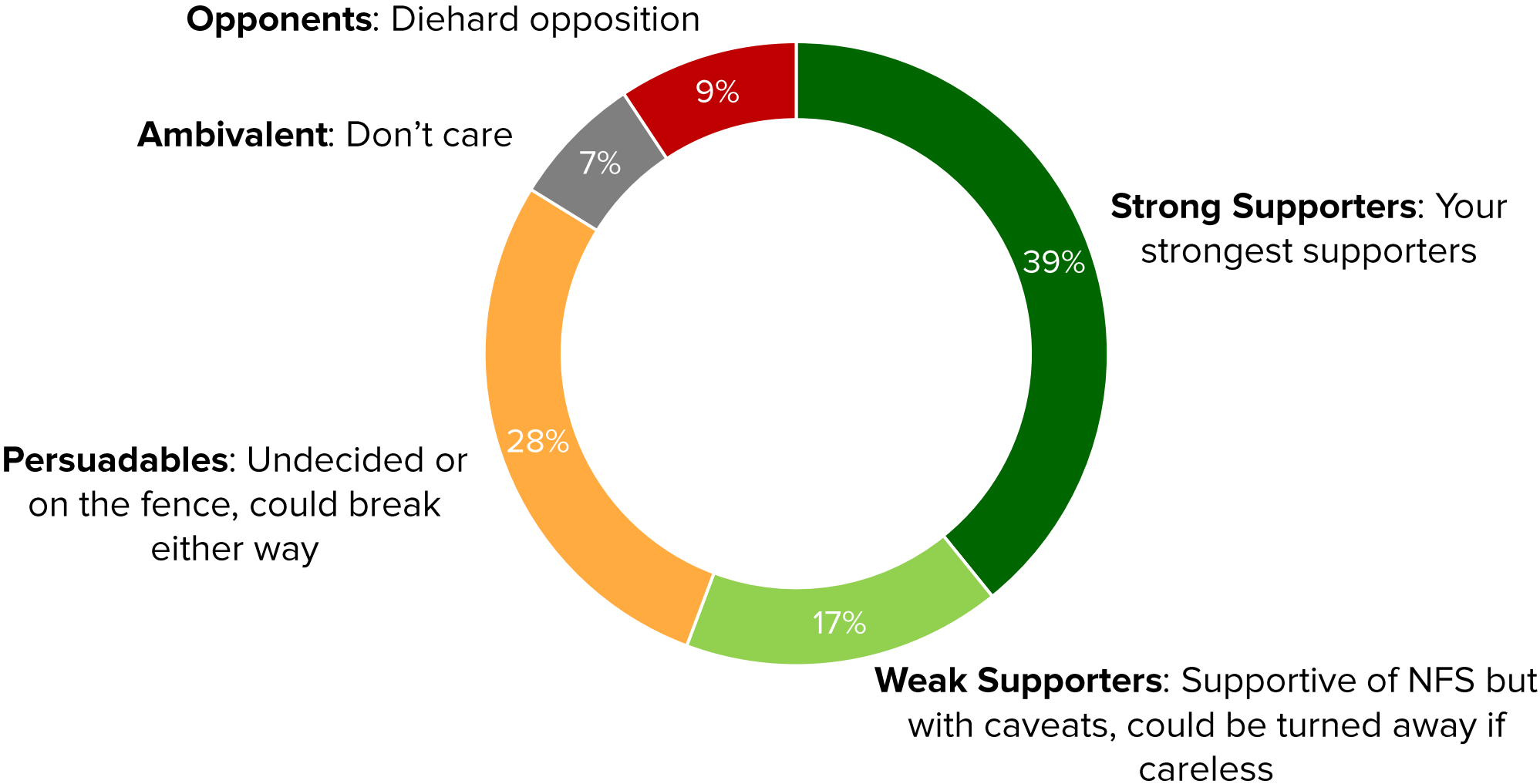
Health Lifestyle Habits





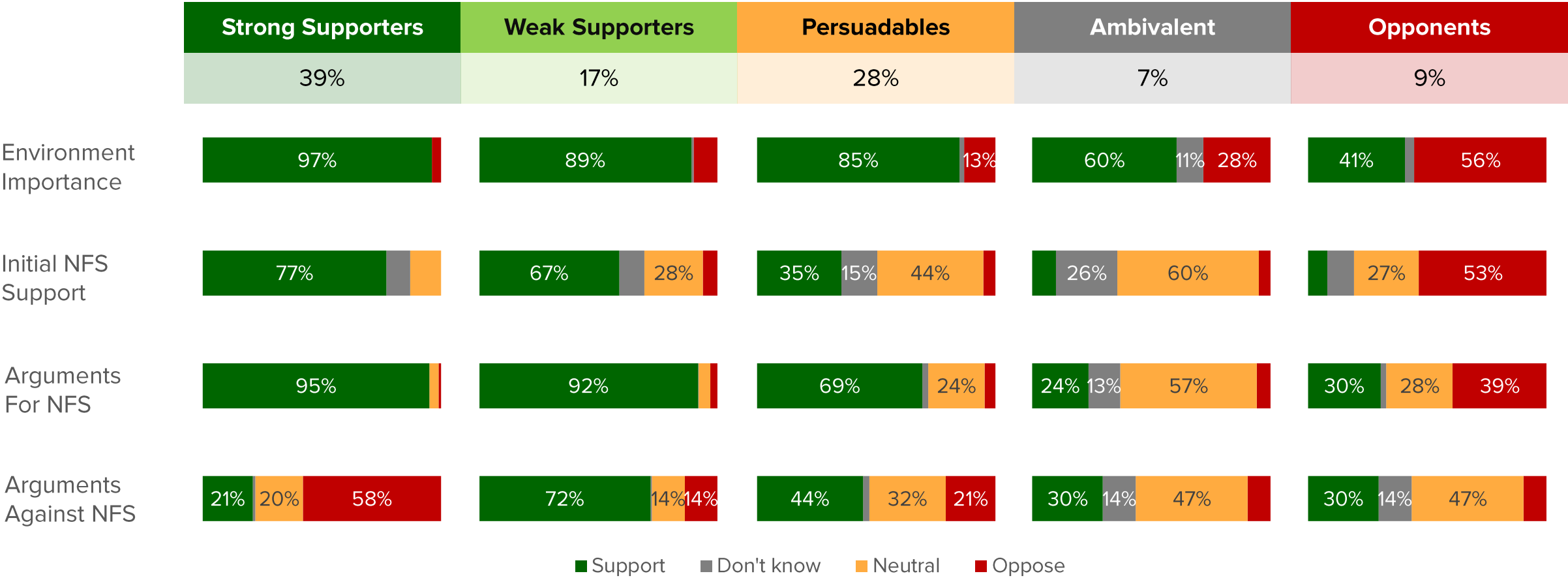
Attitudinal Segmentation

Attitudinal Segmentation



Q) To what extent do you support or oppose the 'National Food Strategy' review?
 Q) Listed below are some statements IN SUPPORT of implementing a new National Food Strategy. Please indicate to what extent you agree or disagree with each one.
 Q) Listed below are some statements IN OPPOSITION to implementing a new National Food Strategy. Please indicate to what extent you agree or disagree with each one.

UK Healthiness



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Attitudinal Segmentation

	Strong Supporters	Weak Supporters	Persuadables	Ambivalent	Opponents
Size of Sample	39%	17%	28%	7%	9%
Demographics	Female (+5) University Educated (+6)	25-34 (+8) Employed (+11) Have Children (+9) Have young children (+16)		Under £15k Income (+9) No children (+10)	Male (+18) 55+ (+12)
Issues and Opinions	Think UK is unhealthy (+9) Think food system is broken (+16) Vegan / Vegetarian (+4) Like Greenpeace (+27) Like Greta Thunberg (+33)	Consider themselves healthy (+8) Think UK is healthy (+14)	Only think environment 'fairly' important (+15) Think food system is fine (+8)		Consider themselves fairly unhealthy (+9) Think food system is fine (+21) Regular Meat Eaters (+12)
Psychographics	Remain (+7) Labour 2019 (+5)			Non voters (+12)	Leave (+19) Brexit Party 2019 (+7)
Media Use	TV (+7) Radio (+7) Newspapers (+4) BBC News (+10) Channel 4 (+5) Guardian (+7)	Facebook (+13) Twitter (+5)			



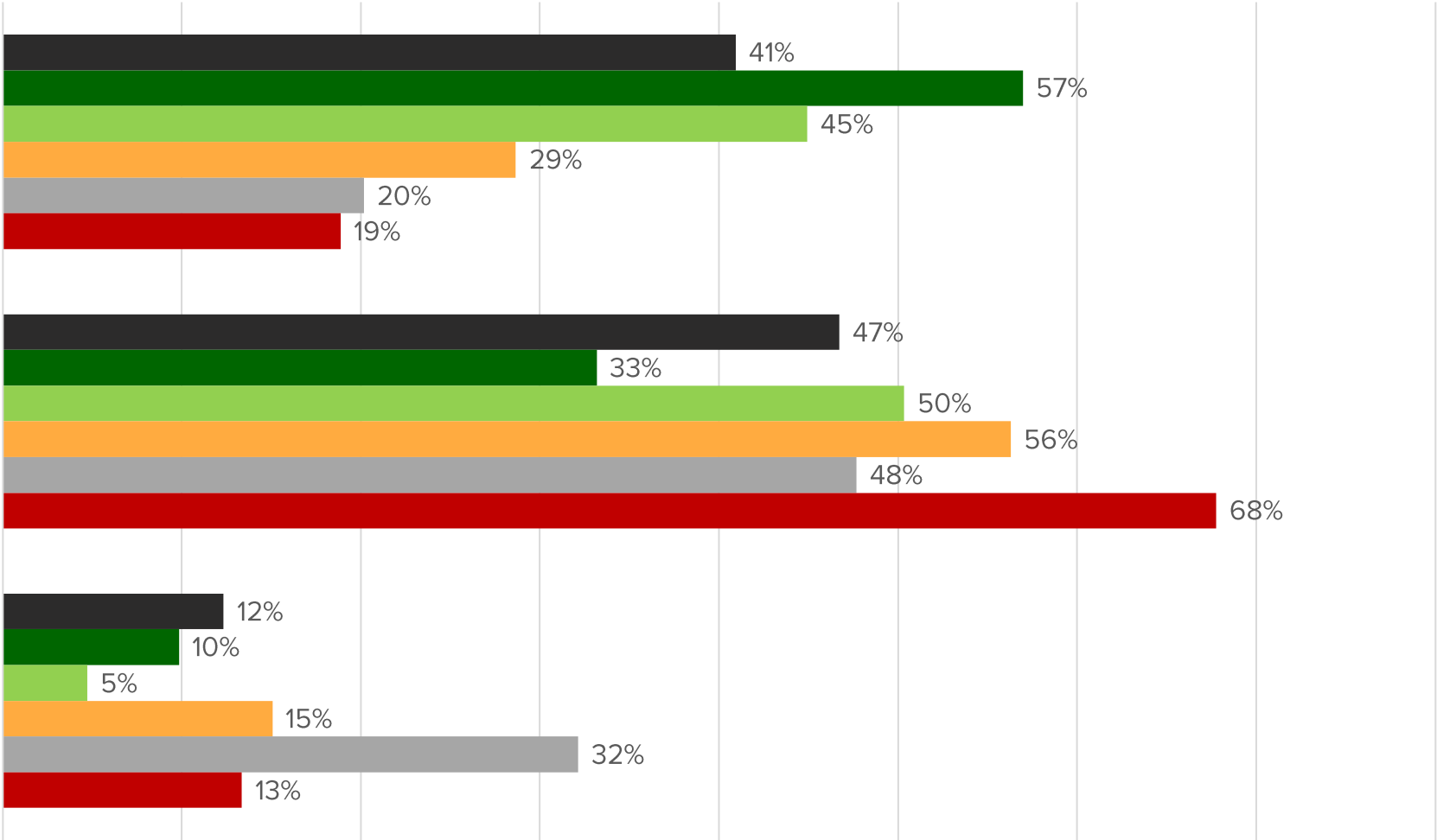
National Food Strategy: Motivations

Current UK Food System

The food system in the UK is broken - making people fat, sick and ill. It's harming the environment and urgent action is needed to fix it

The UK food system may have its flaws but it is not broken. It is fine as it is and urgent action is not needed

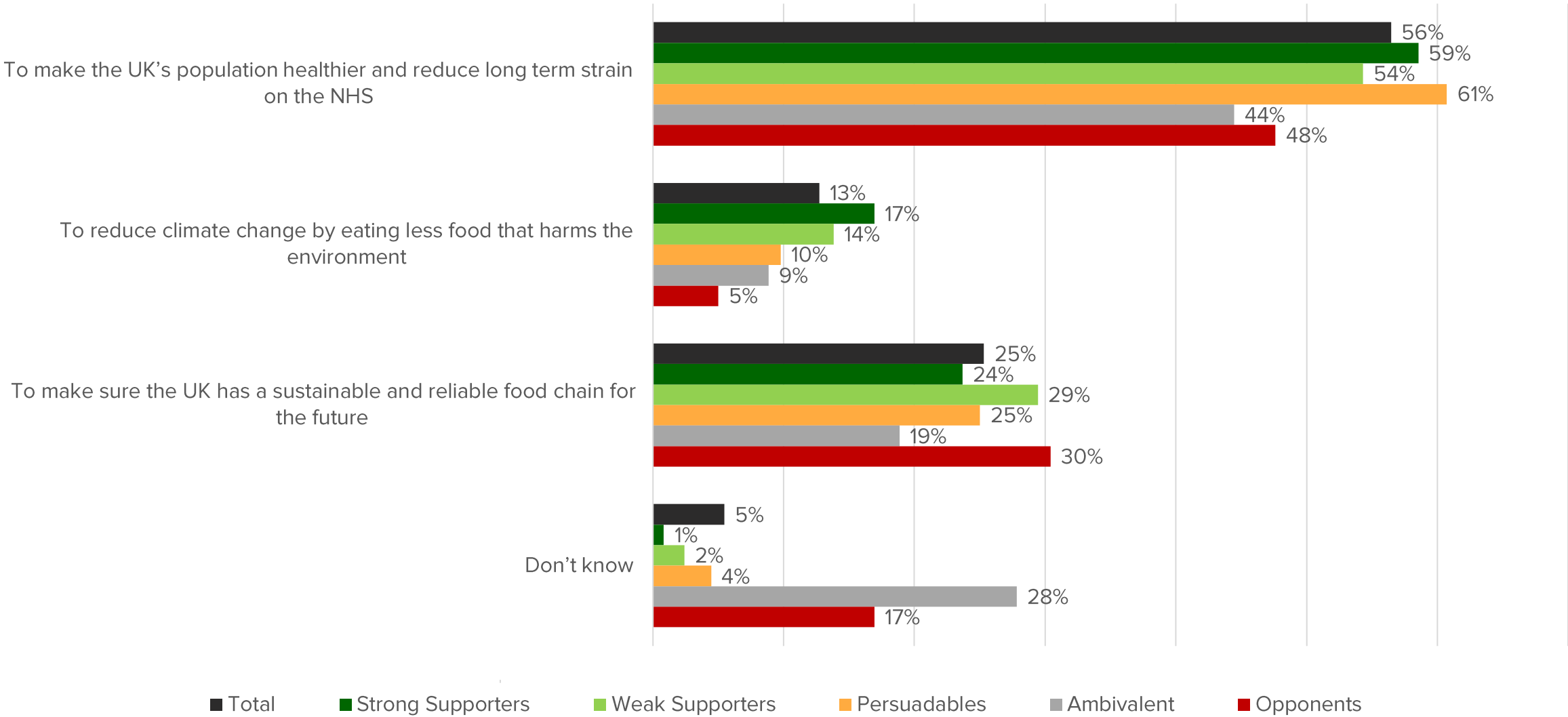
Don't know



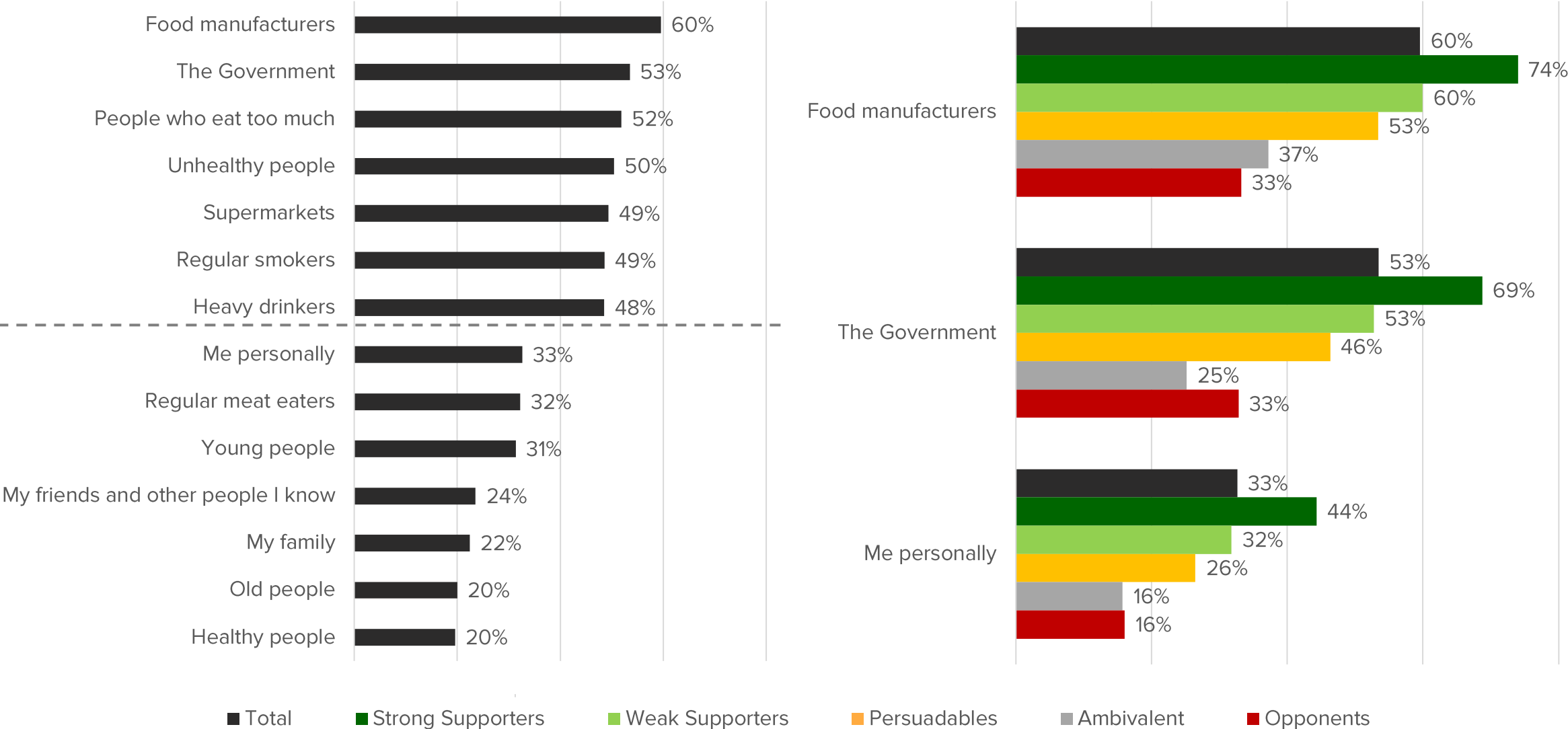
■ Total ■ Strong Supporters ■ Weak Supporters ■ Persuadables ■ Ambivalent ■ Opponents

Q) Which of the following comes closest to your views?

Motivations for a New Food System



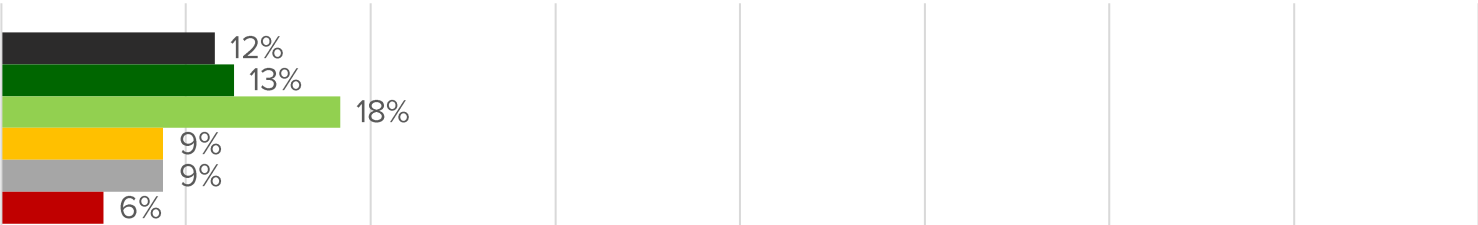
Who Needs to Change?



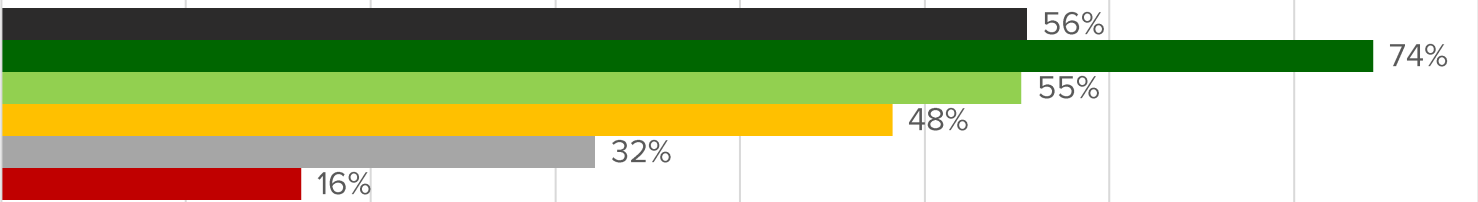
Q) Out of the following people and organisations listed, please select who needs to change the way they behave in order to make the UK's food system better.

How to get them to change?

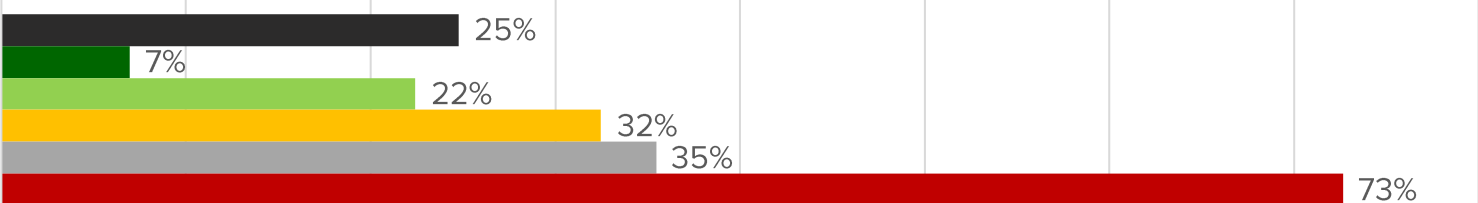
The Government should force people to change their eating habits by introducing new laws that ban certain foods and limit consumption of 'bad foods'



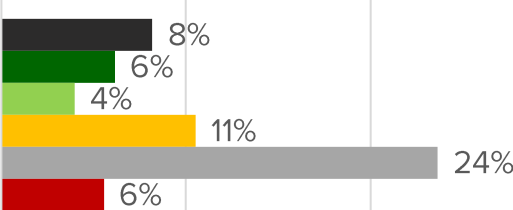
The Government should encourage people to change their eating habits by introducing taxes on 'bad foods' and by promoting healthy eating



The Government shouldn't try to change people's eating habits, it's none of their business



Don't know



■ Total ■ Strong Supporters ■ Weak Supporters ■ Persuadables ■ Ambivalent ■ Opponents

Q) Which of the following comes closest to your view about changing eating habits in the UK?

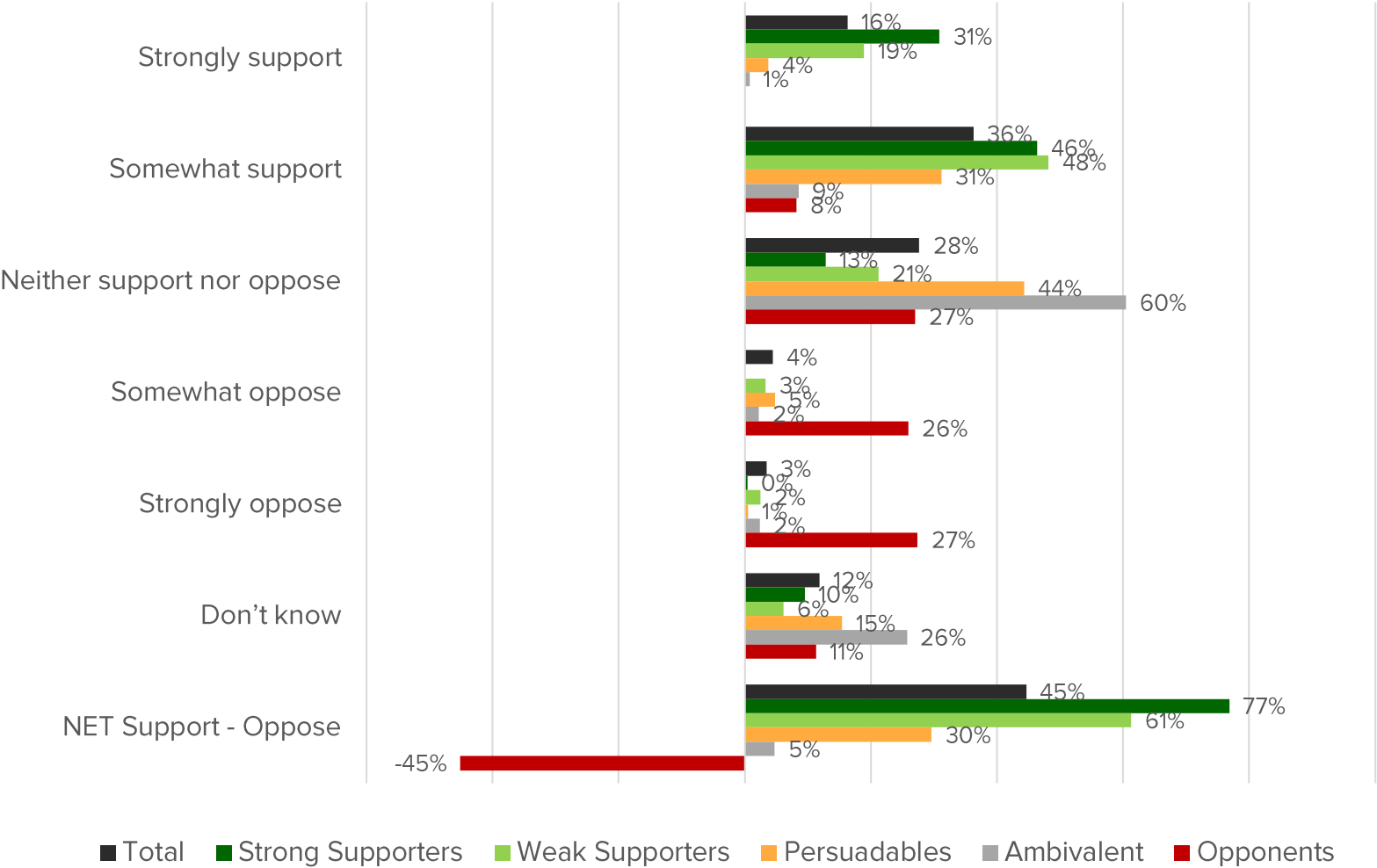


Message Testing

NFS Support (Before Message Testing)

The Government has launched an independent review into the UK’s food system to understand the impact of our current food system on national health, the environment and nature.

This review, called the ‘National Food Strategy’ will set out a plan for a better food system in the UK.

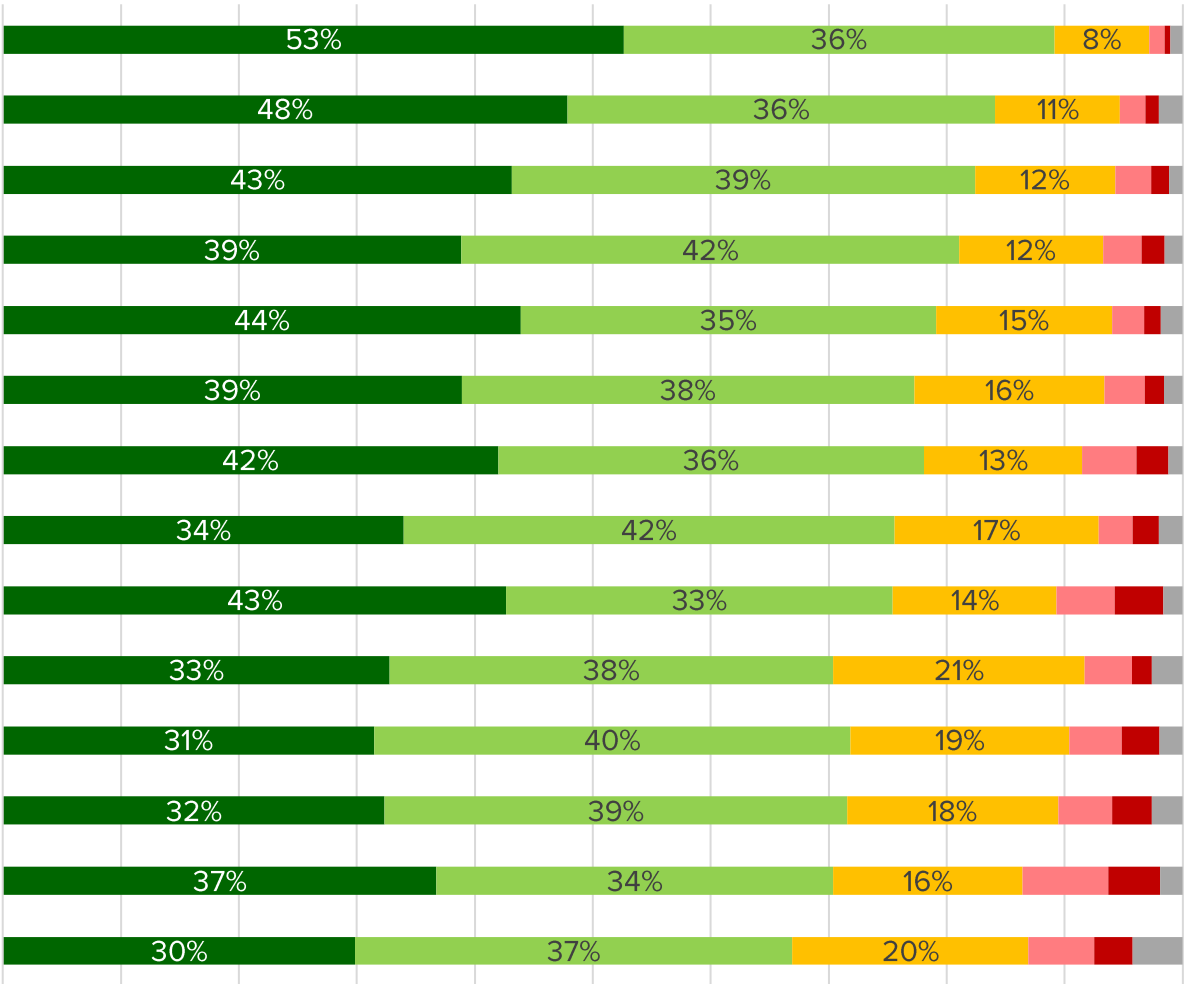




Arguments for the NFS

% (NET Agree – Disagree)

- We need to support our farmers to make the best use of our land (+87)
- The UK must cut down the amount of waste it creates and having a better national food system can help achieve that (+81)
- The best way to protect the NHS in the future is for the public to become healthier through healthy eating so they don't require as much treatment in the future (+78)
- If everyone makes small sacrifices our combined effort will have a significant positive impact on the world (+76)
- It's vital that we leave our children a better world than the one we live in and proposals like these are exactly the way to do that (+75)
- A new food system that makes food more affordable will contribute to a fairer society (+72)
- We need to break the junk food cycle for everyone (+71)
- We need to encourage a long term shift in our national food culture (+70)
- Climate change is a real and pressing issue. Radical and rapid action is needed to save the planet (+66)
- The UK should be a world leader in innovation and technology, creating a world-beating food system is one way to get there (+65)
- The Government needs to make tough and sometimes unpopular decisions now to build a better and sustainable future (+64)
- In the wake of the pandemic there is no better time than now to start a new food strategy so that we can 'Build Back Better' as a nation (+64)
- It's too difficult to make good food choices when unhealthy options are so much cheaper and more convenient. The Government should intervene so it's the other way round. The good choice should be the easy choice (+59)
- The way food is produced is harming the countryside and killing off wildlife. We need to act to save nature (+58)



■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree ■ Somewhat disagree ■ Strongly disagree ■ Don't know / Never heard of

Q) Listed below are some statements IN SUPPORT of implementing a new National Food Strategy. Please indicate to what extent you agree or disagree with each one.

Arguments against the NFS

% (NET Agree – Disagree)

Reducing plastic use and switching to renewable energy is a much better way to tackle climate change than making us change our diets (+54)

These types of plans only ever make things more expensive for the consumer, they never actually change behaviours (+43)

Proposals like these are only ever suggested by the liberal elite who have no idea about the everyday struggles of normal people (+32)

What right does the government have to tell me what I can and can't eat? It's up to me (+22)

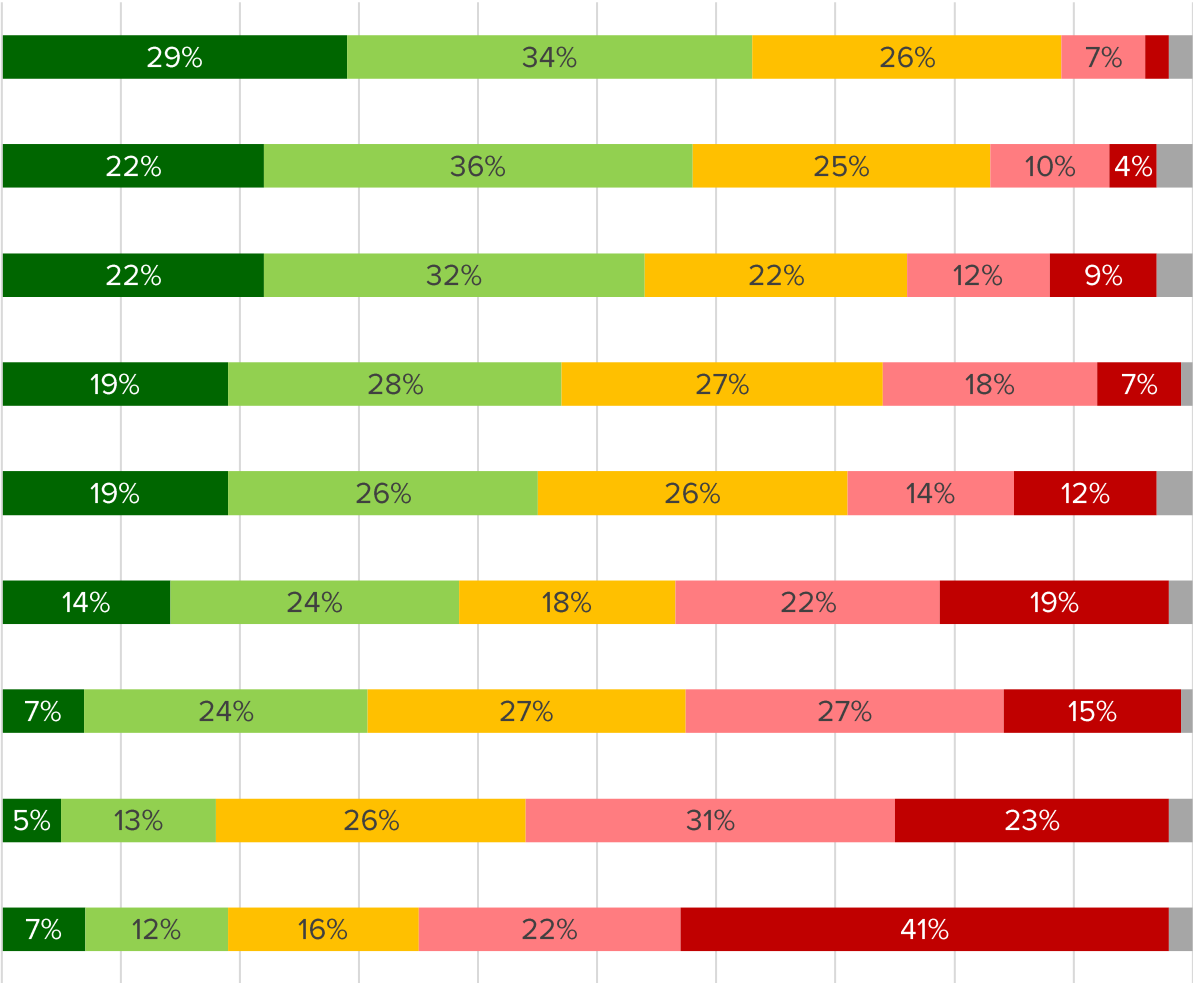
I don't want to switch to meat alternatives, they're unproven and might end up causing negative side effects in years to come (+20)

What's the point in changing our lifestyle when countries like China will never change theirs? Any action we take is futile in comparison (-3)

I know I ought to be doing more to improve my eating habits, but I'm set in my ways and I'm not going to change my behaviour (-10)

There's nothing wrong with the current food system so let's not change it (-37)

Climate change is overemphasised, we don't need to worry about it as much as people say (-44)

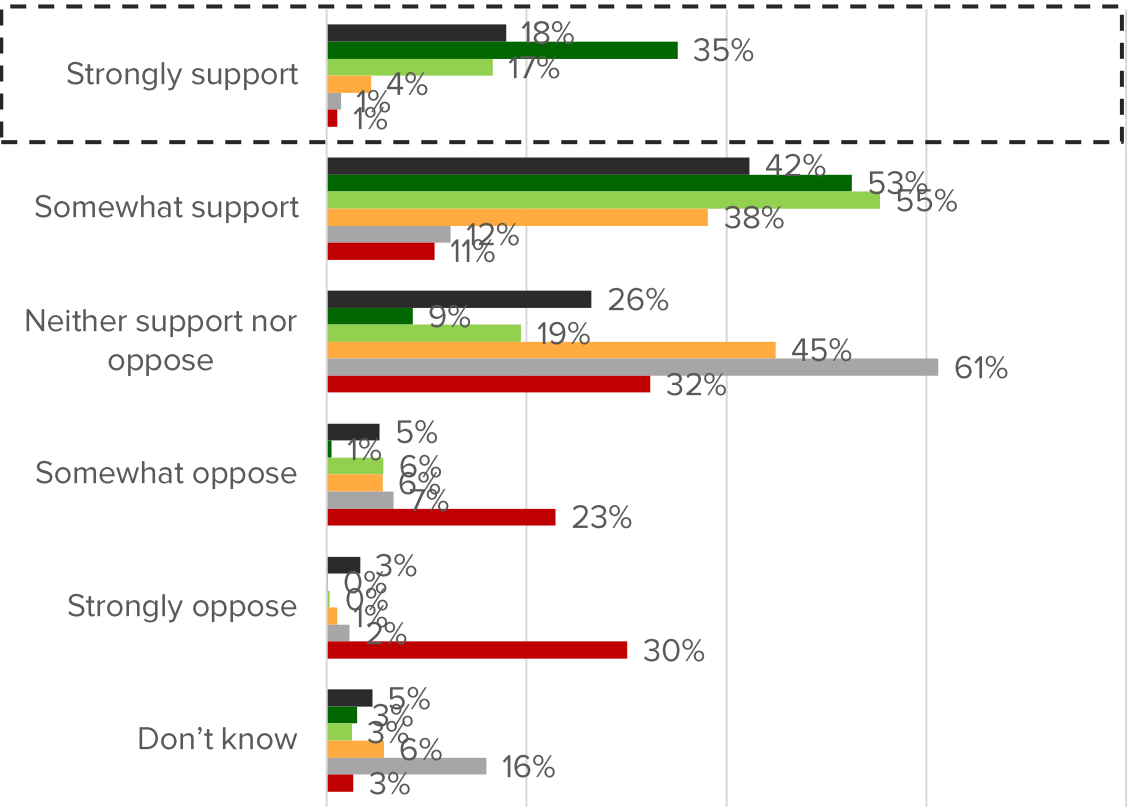


■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree ■ Somewhat disagree ■ Strongly disagree ■ Don't know / Never heard of

Q) Listed below are some statements IN OPPOSITION to implementing a new National Food Strategy. Please indicate to what extent you agree or disagree with each one.

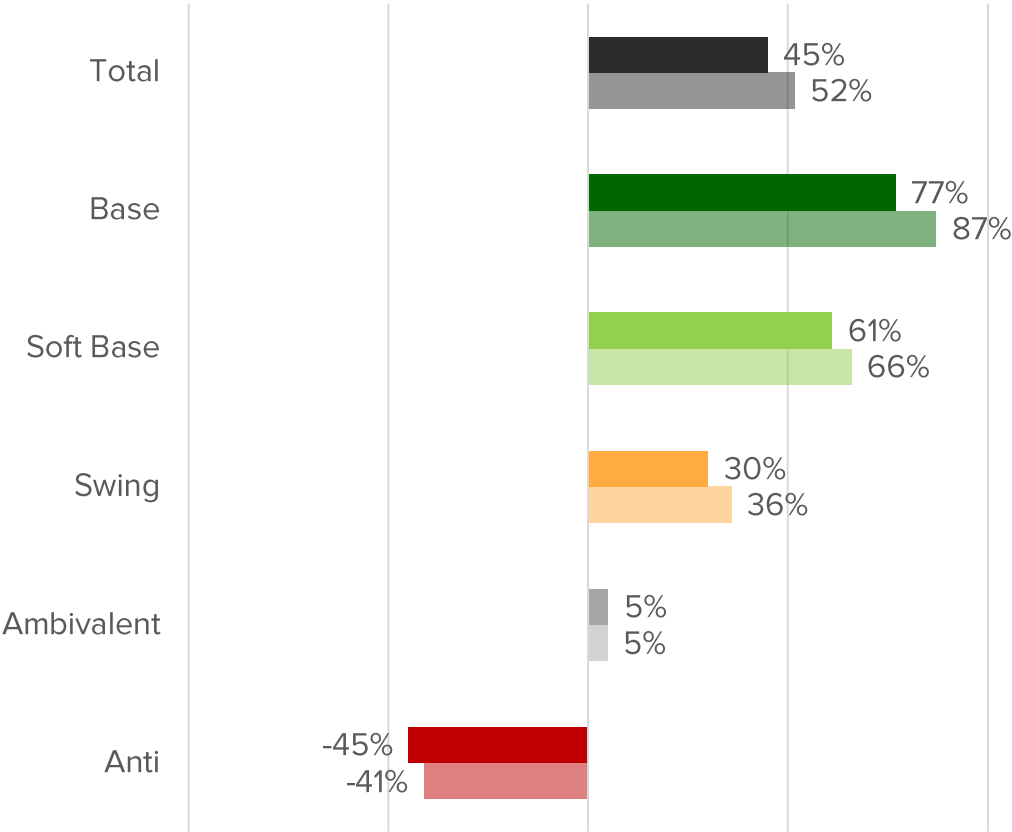
How Messaging Impacts NFS Support

NFS Support: After message testing



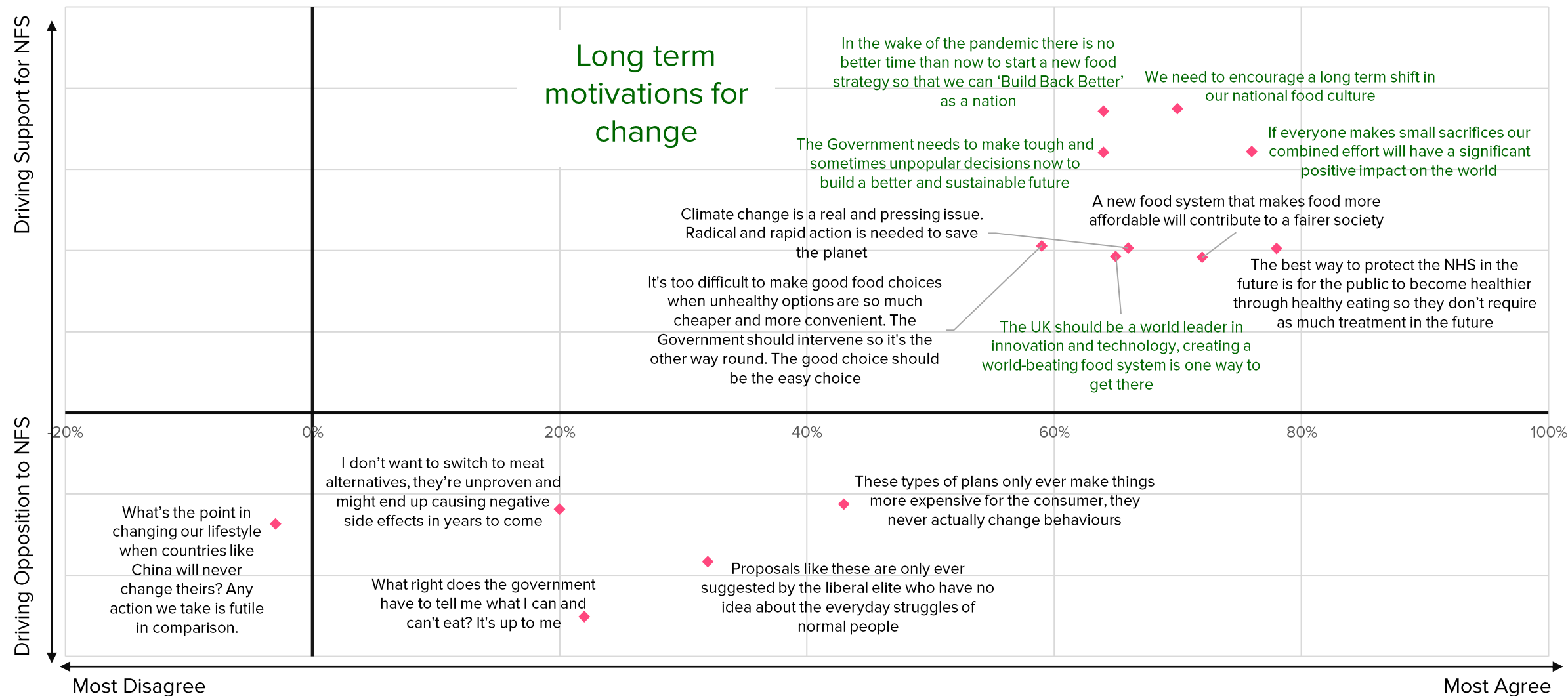
■ Total
 ■ Strong Supporters
 ■ Weak Supporters
 ■ Persuadables
 ■ Ambivalent
 ■ Opponents

NET Support – Oppose

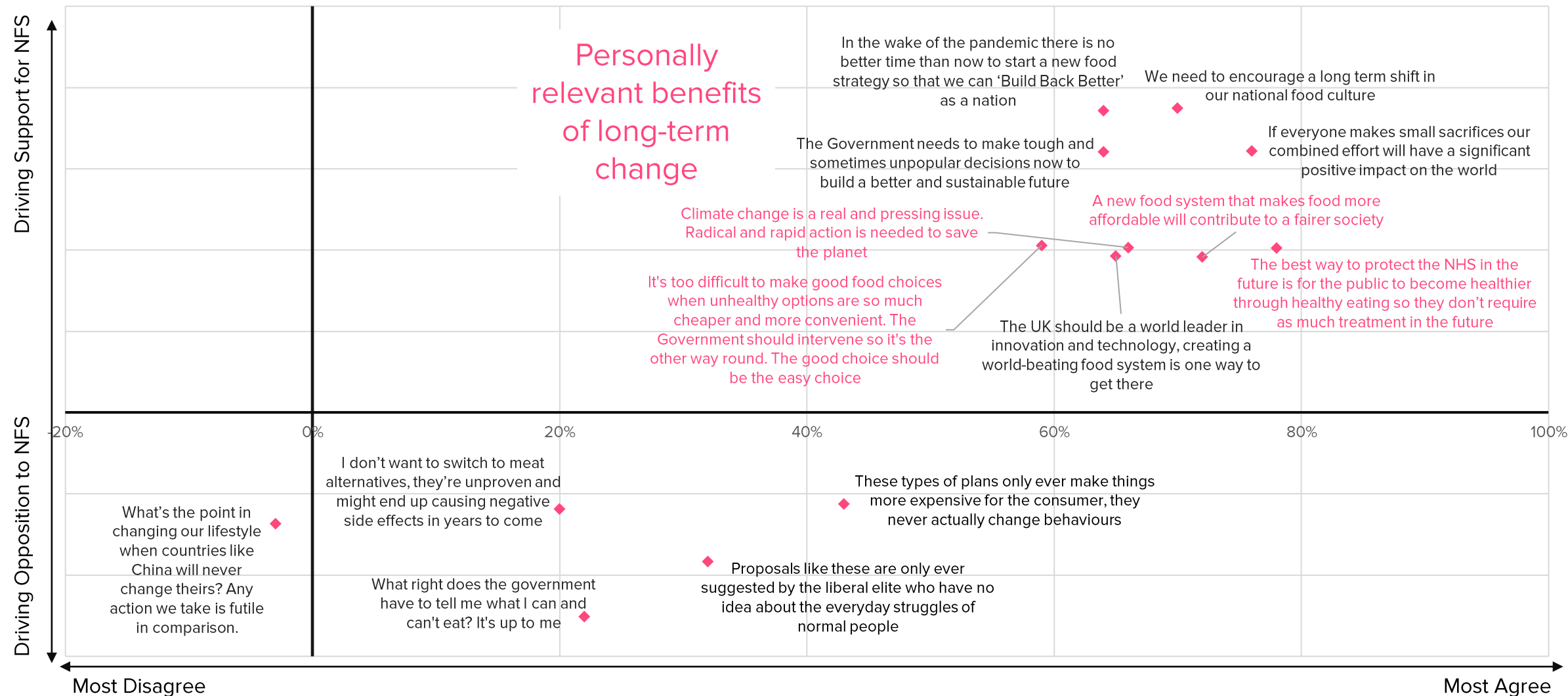


■ Before message testing
 ■ After message testing

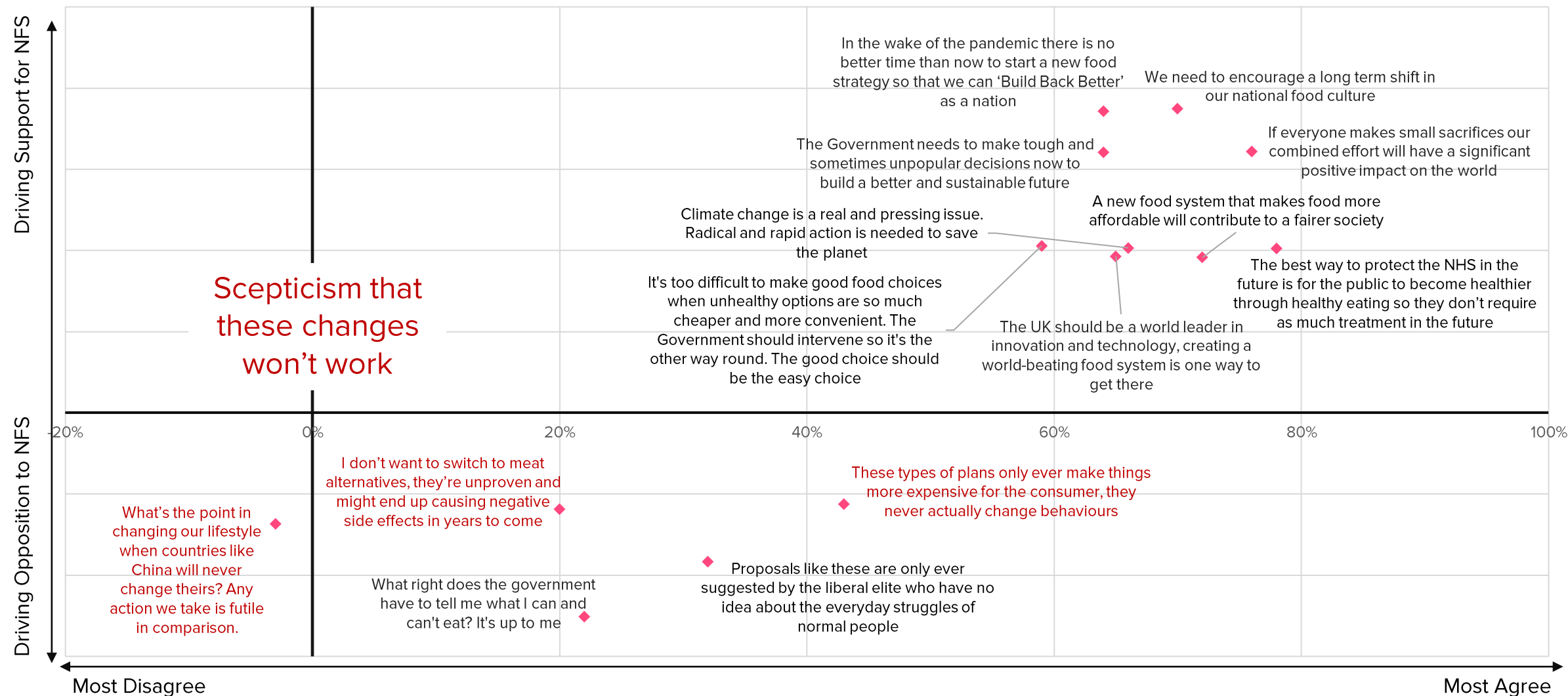
Opinion Drivers: What is moving opinions?



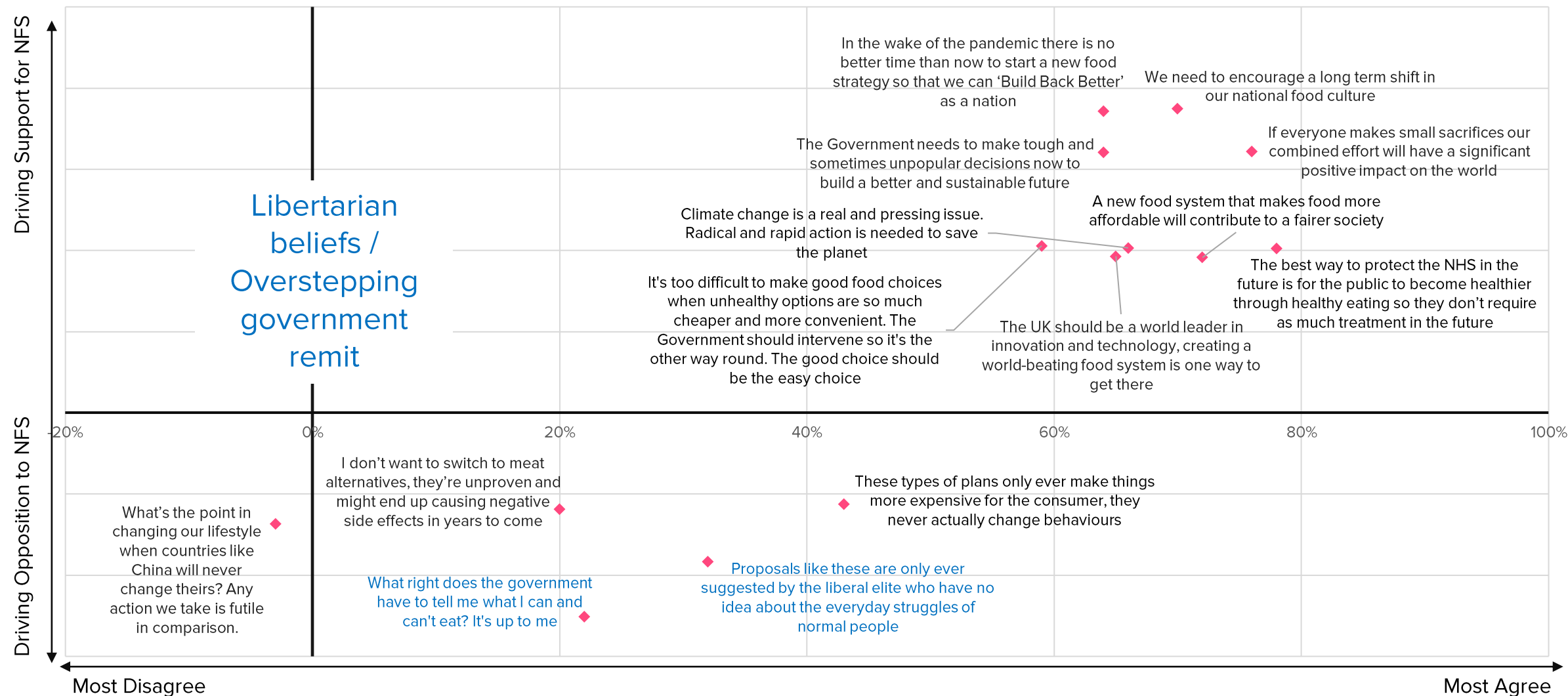
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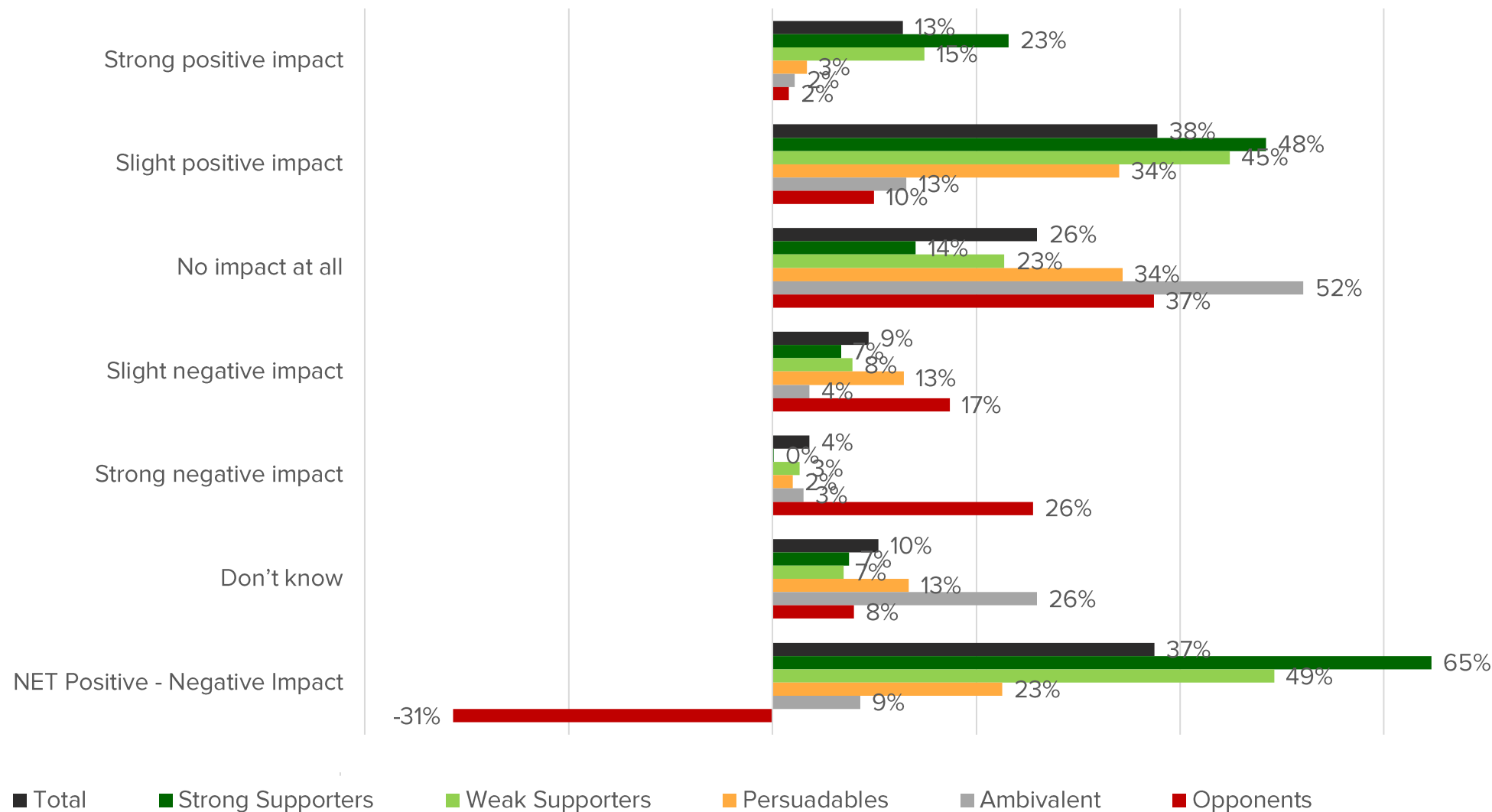
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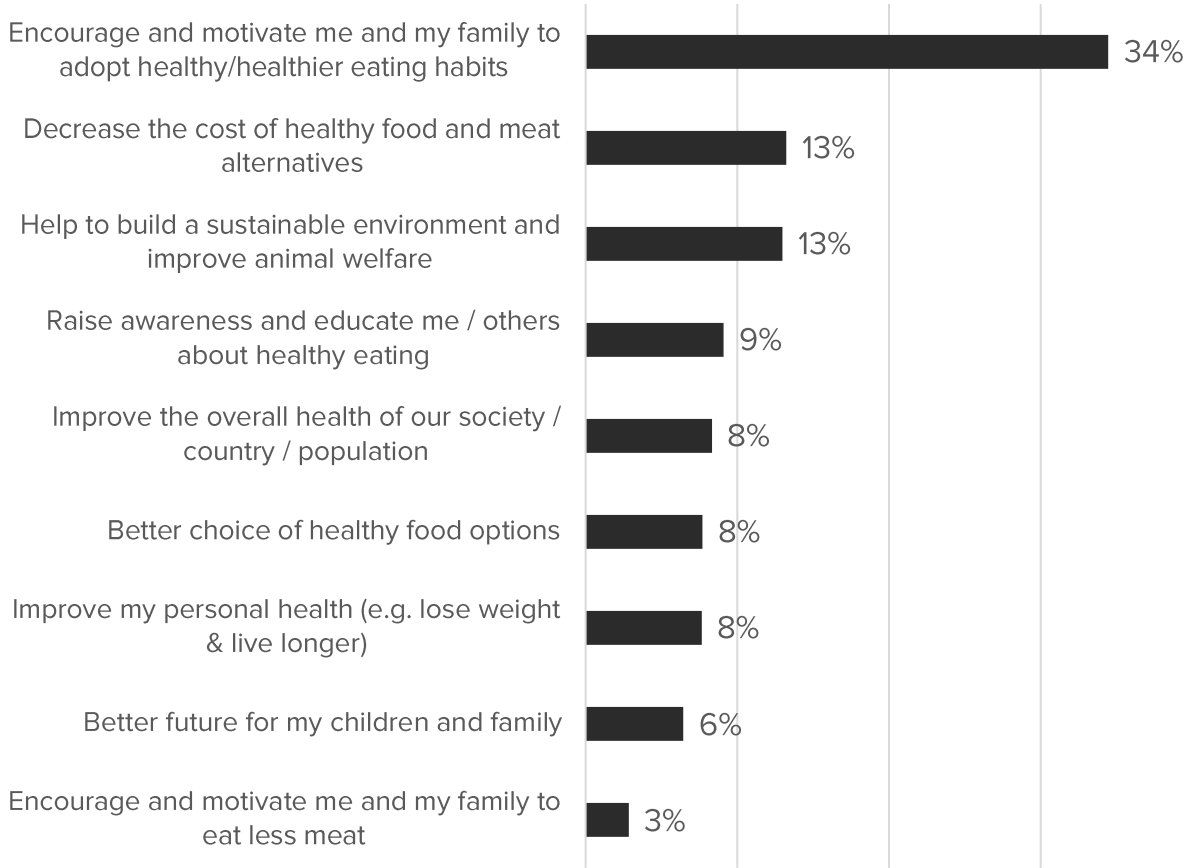


Perceived Impact of NFS on Individuals

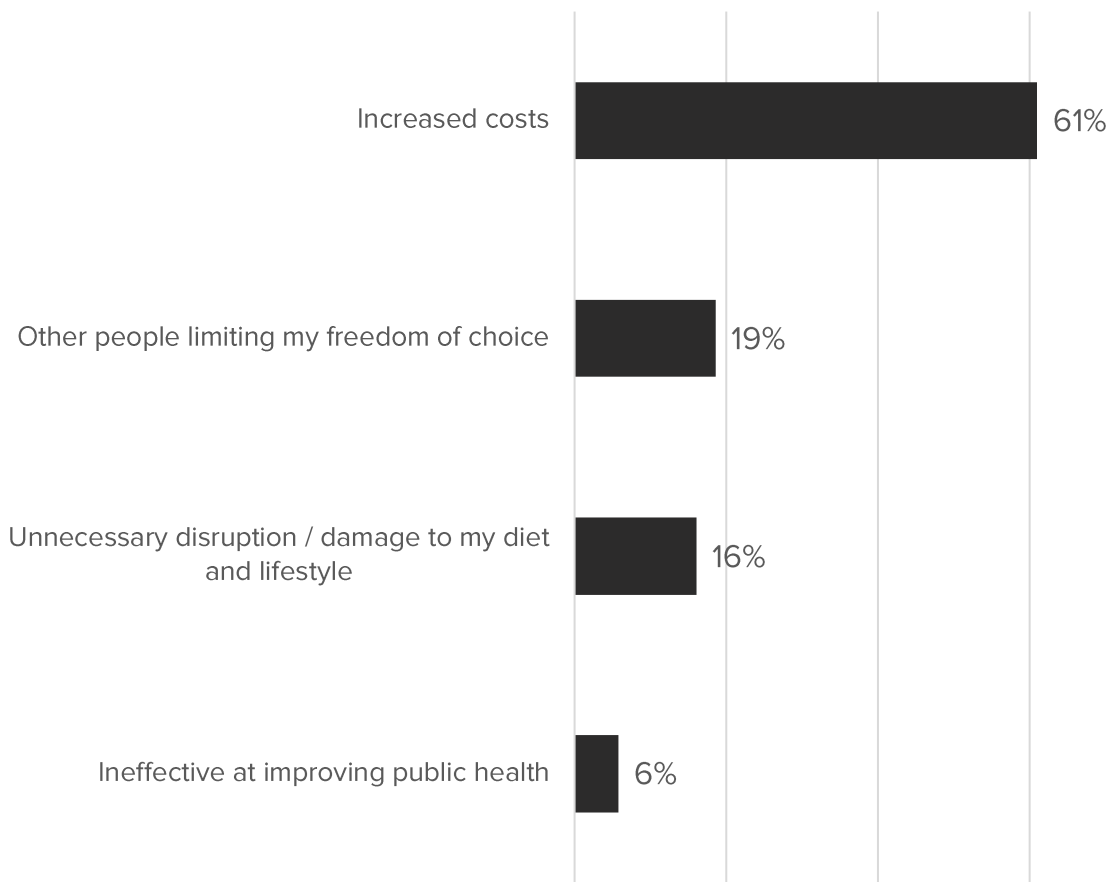


Perceived Impact of NFS on Individuals

Those who said it would positively impact them said...



Those who said it would negatively impact them said...

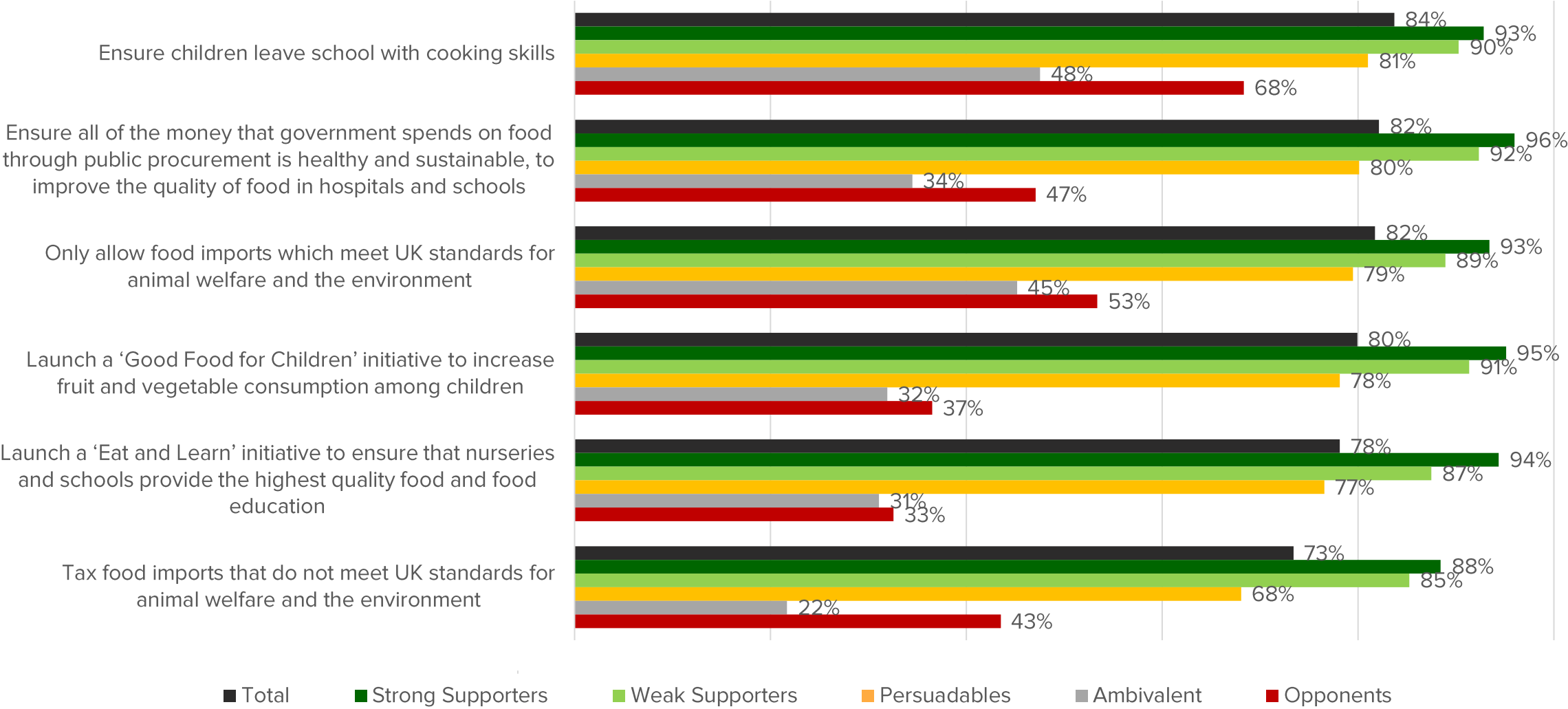


Q) In your own words, how would these policies have a POSITIVE impact on you? BASE = Those positively impacted
 Q) In your own words, how would these policies have a NEGATIVE impact on you? BASE = Those negatively impacted

Support for Individual NFS Policies

Policy Support (1 of 5)

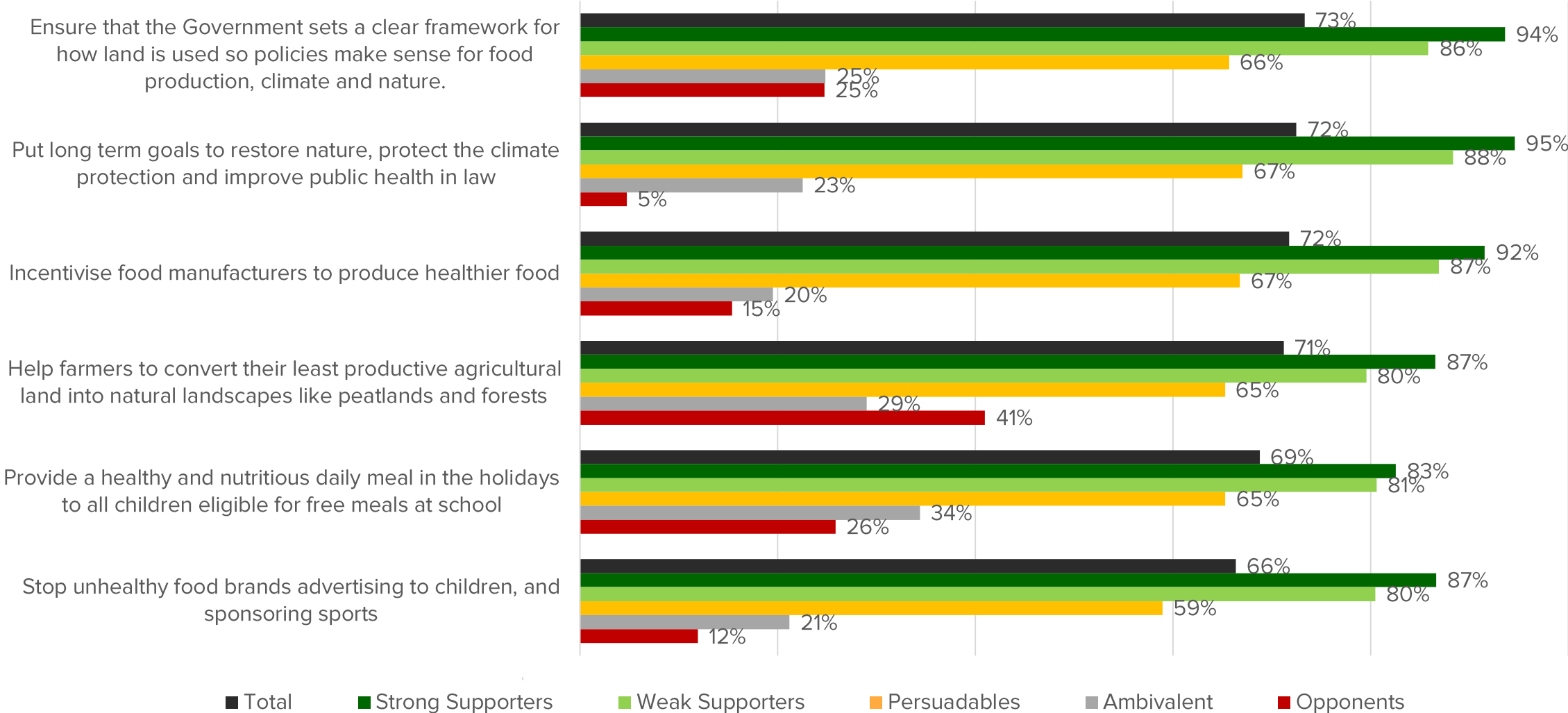
% NET Support – Oppose



Q) Listed below are some policies that the National Food Strategy might propose. Please indicate to what extent you support or oppose each one.

Policy Support (2 of 5)

% NET Support – Oppose



Q) Listed below are some policies that the National Food Strategy might propose. Please indicate to what extent you support or oppose each one.

Policy Support (3 of 5)

% NET Support – Oppose

Tackle food poverty by providing food vouchers for those who can't afford to put food on the table

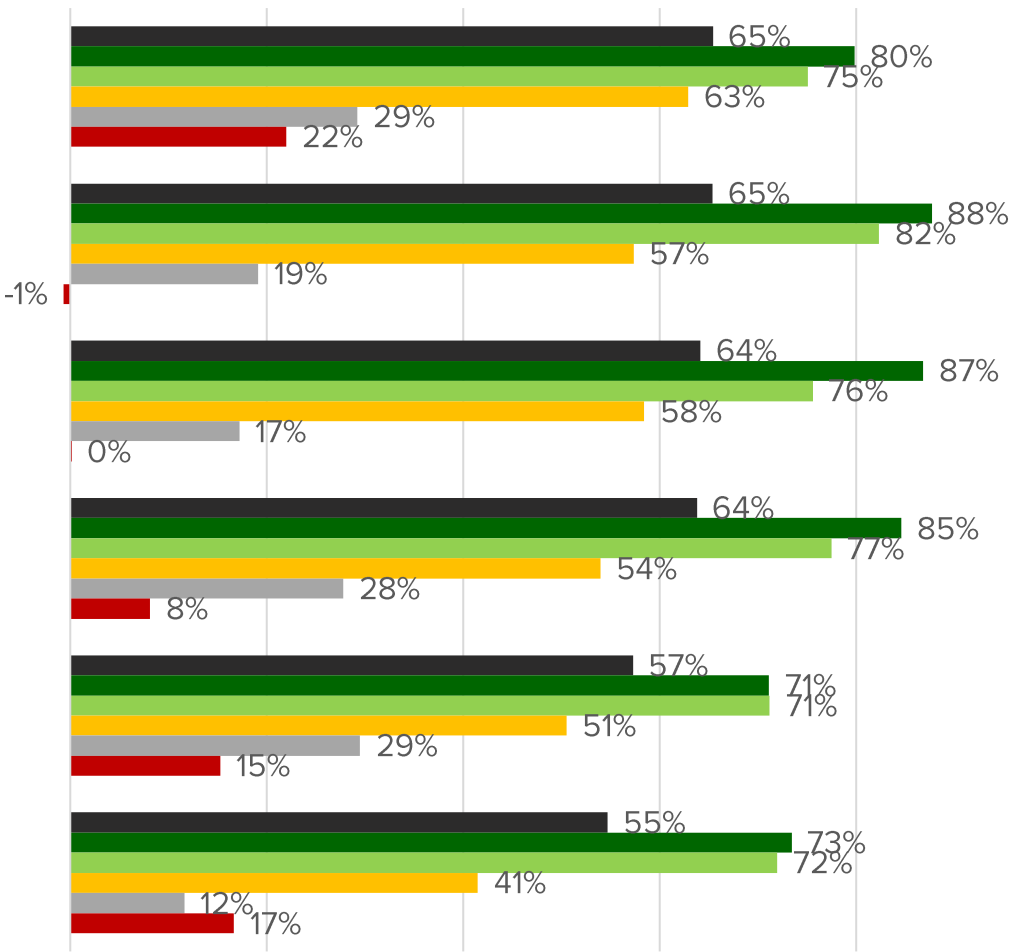
Incentivise supermarkets to sell healthier food

Increase tax on big corporations that encourage unhealthy eating

Set up a campaign to increase the consumption of fibre in food such as wholemeal bread, pasta and breakfast cereals

Extend free school meals to all children whose families earn less than £20,000 per year

Support the development and uptake of methane suppressing technologies and practices for livestock

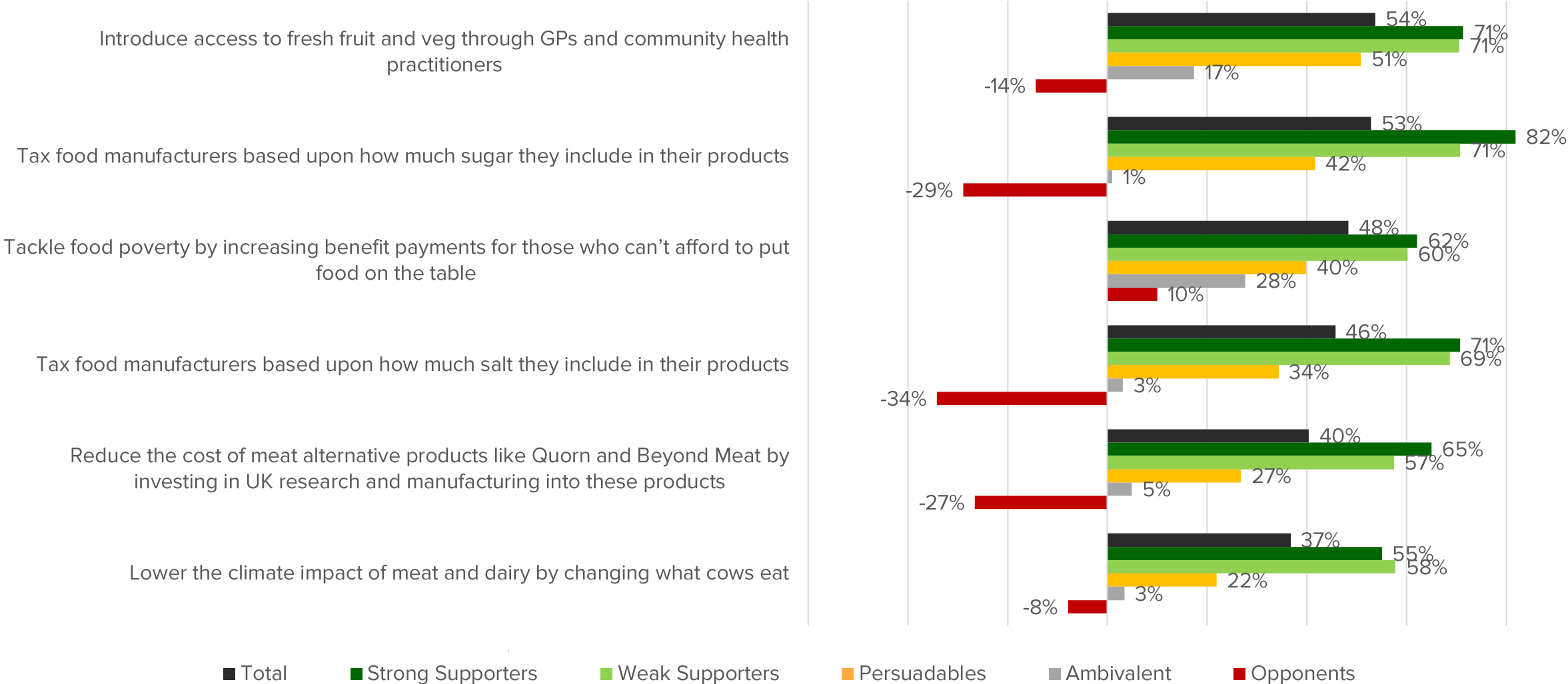


■ Total ■ Strong Supporters ■ Weak Supporters ■ Persuadables ■ Ambivalent ■ Opponents

Q) Listed below are some policies that the National Food Strategy might propose. Please indicate to what extent you support or oppose each one.

Policy Support (4 of 5)

% NET Support – Oppose



Q) Listed below are some policies that the National Food Strategy might propose. Please indicate to what extent you support or oppose each one.

Policy Support (5 of 5)

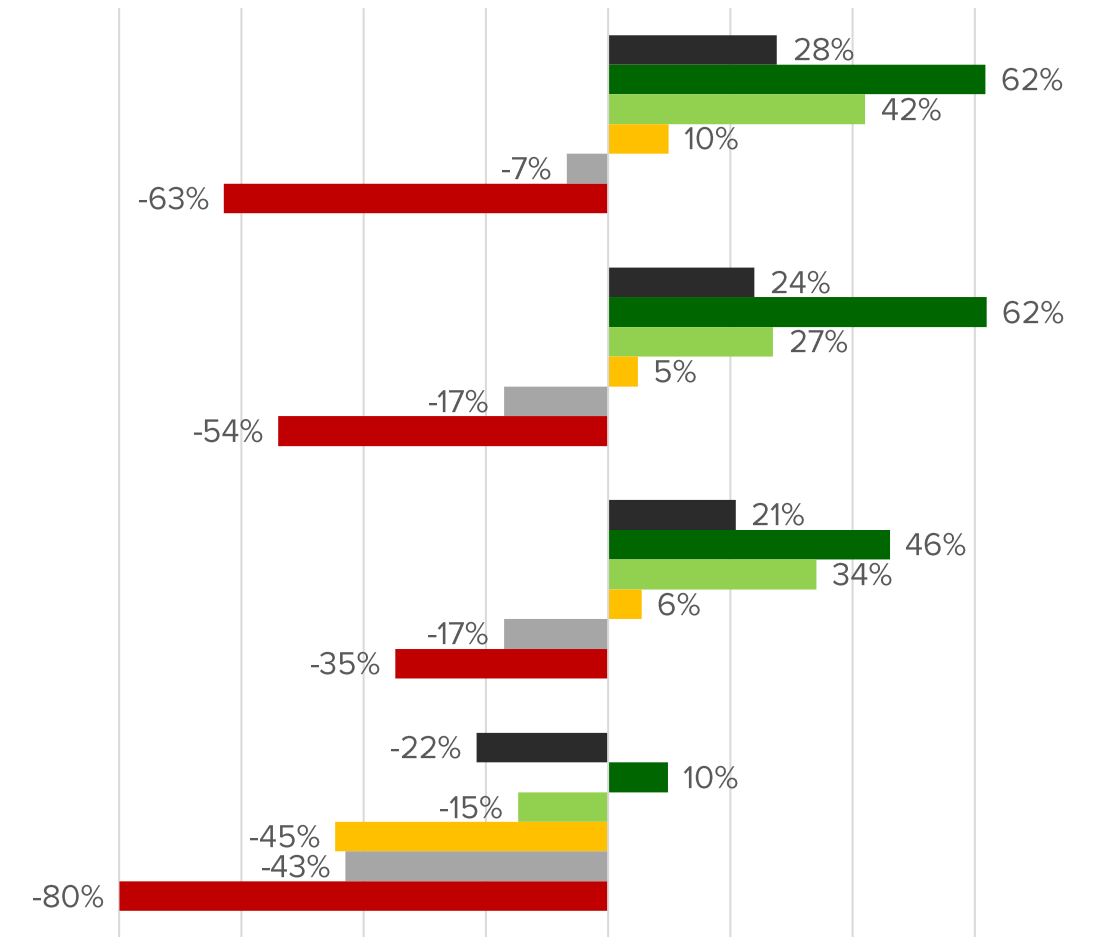
% NET Support – Oppose

Set a target for supermarkets and fast food chains to sell 10% less meat by 2030 to tackle climate change

Increase taxes on processed meat

Ban the ‘Buy One Get One Free’ promotions on all unhealthy foods

Increase taxes on fresh meat



■ Total ■ Strong Supporters ■ Weak Supporters ■ Persuadables ■ Ambivalent ■ Opponents

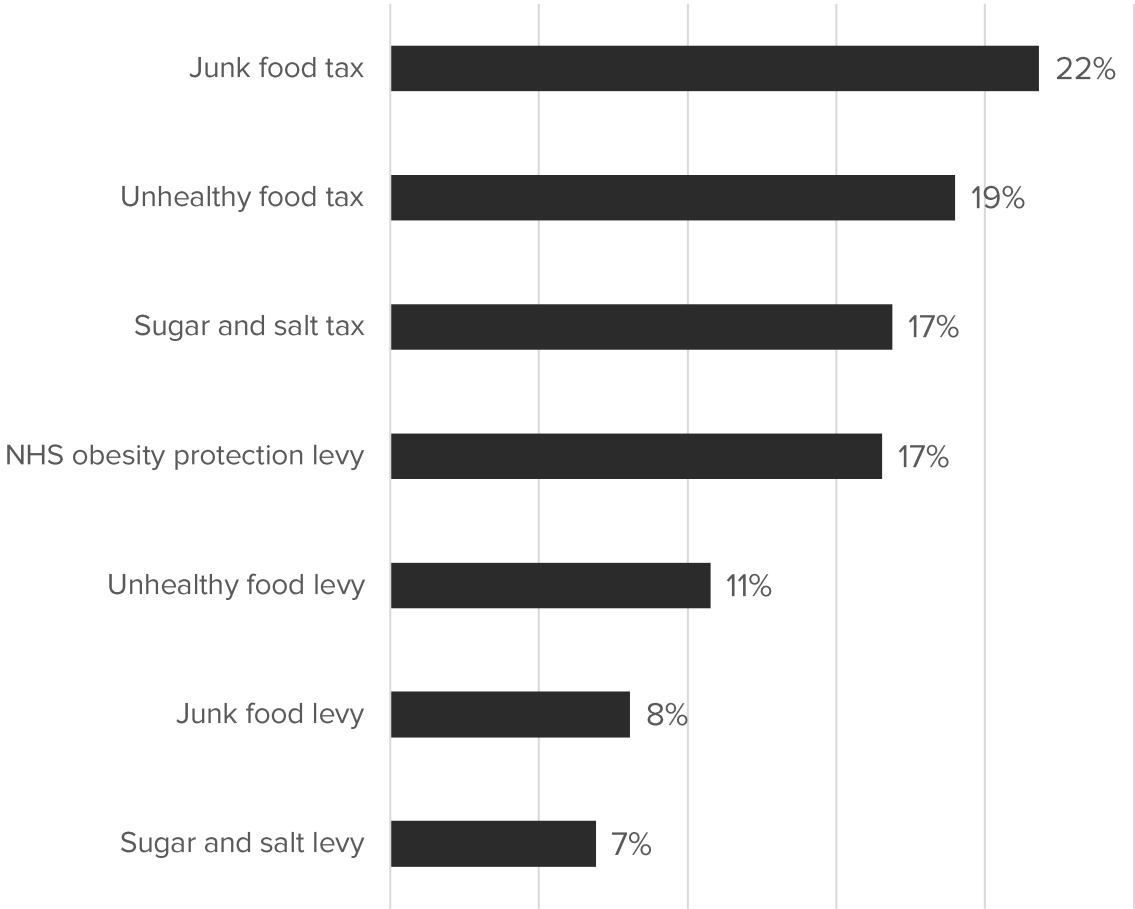
Q) Listed below are some policies that the National Food Strategy might propose. Please indicate to what extent you support or oppose each one.



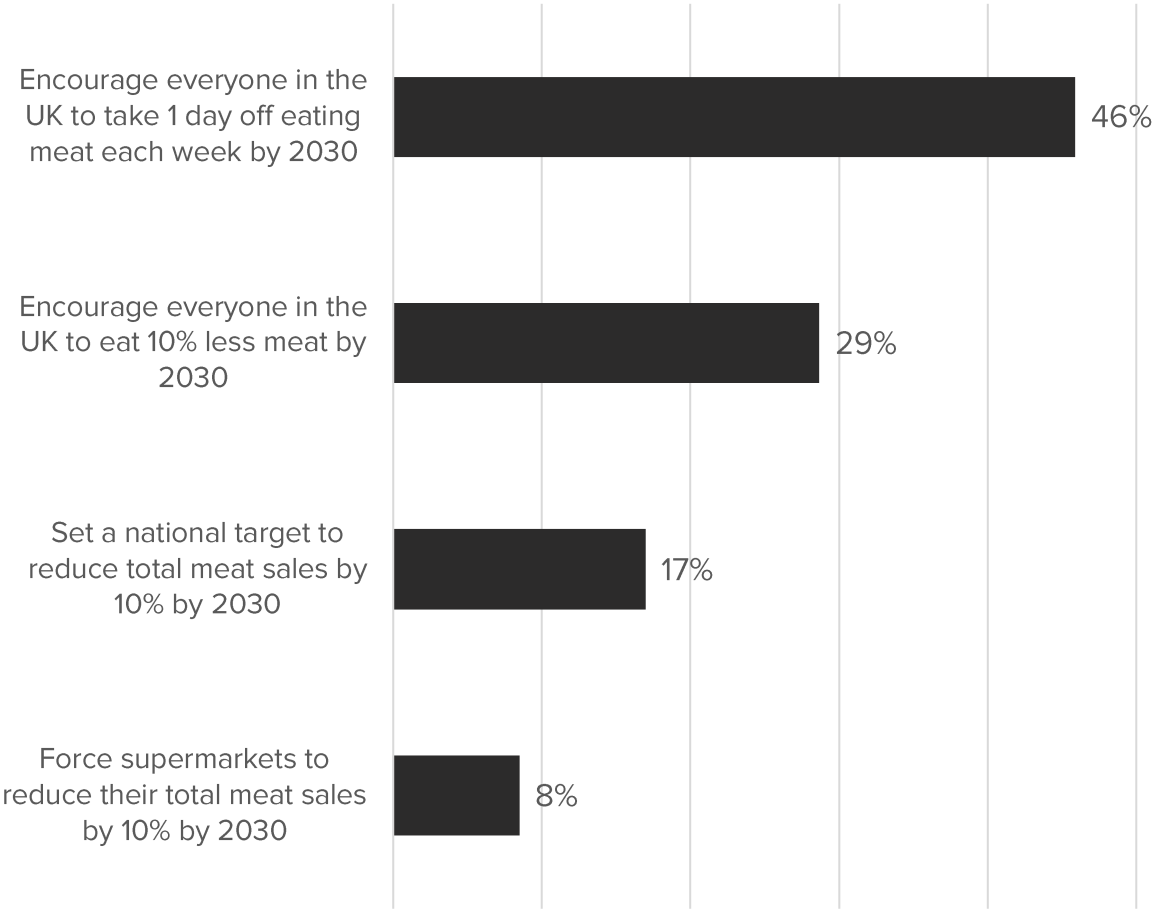
Language Testing

Language Testing (Tax & Targets)

Food Tax

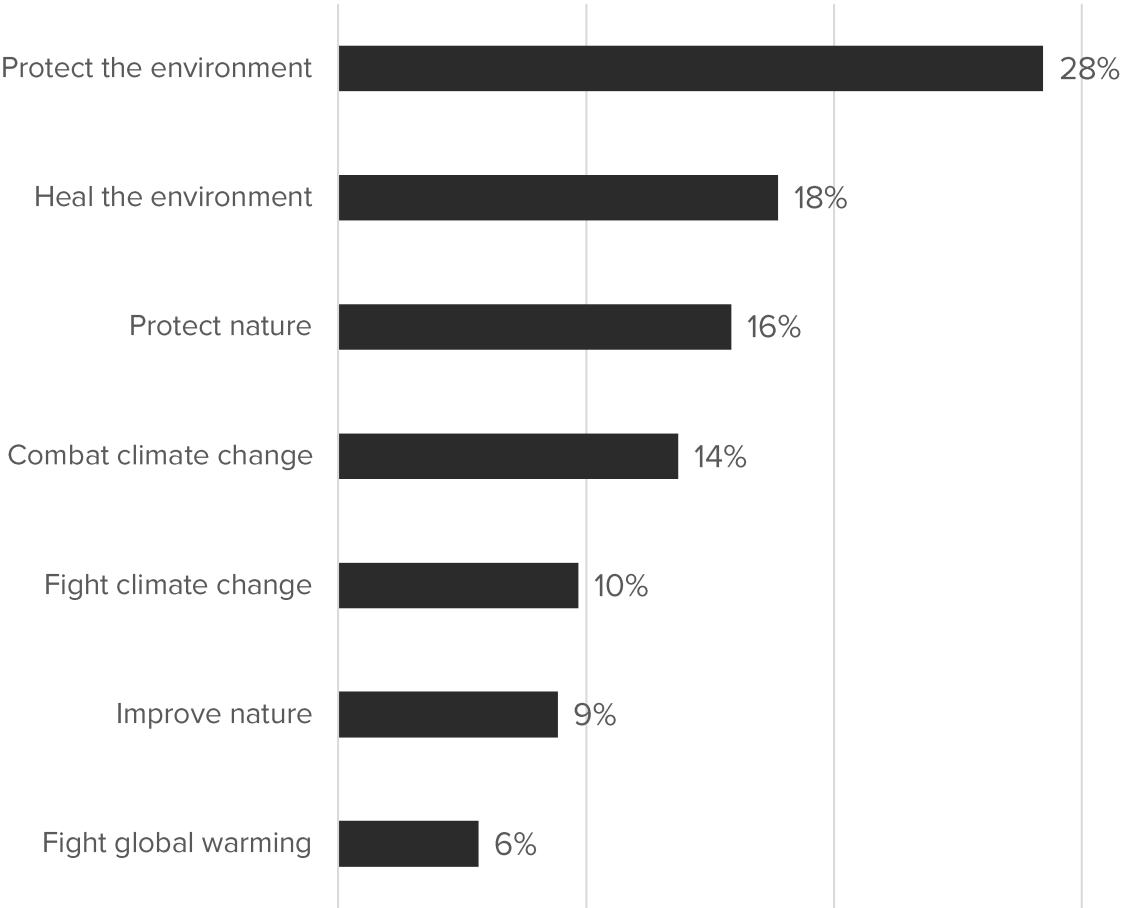


Meat Reduction Targets

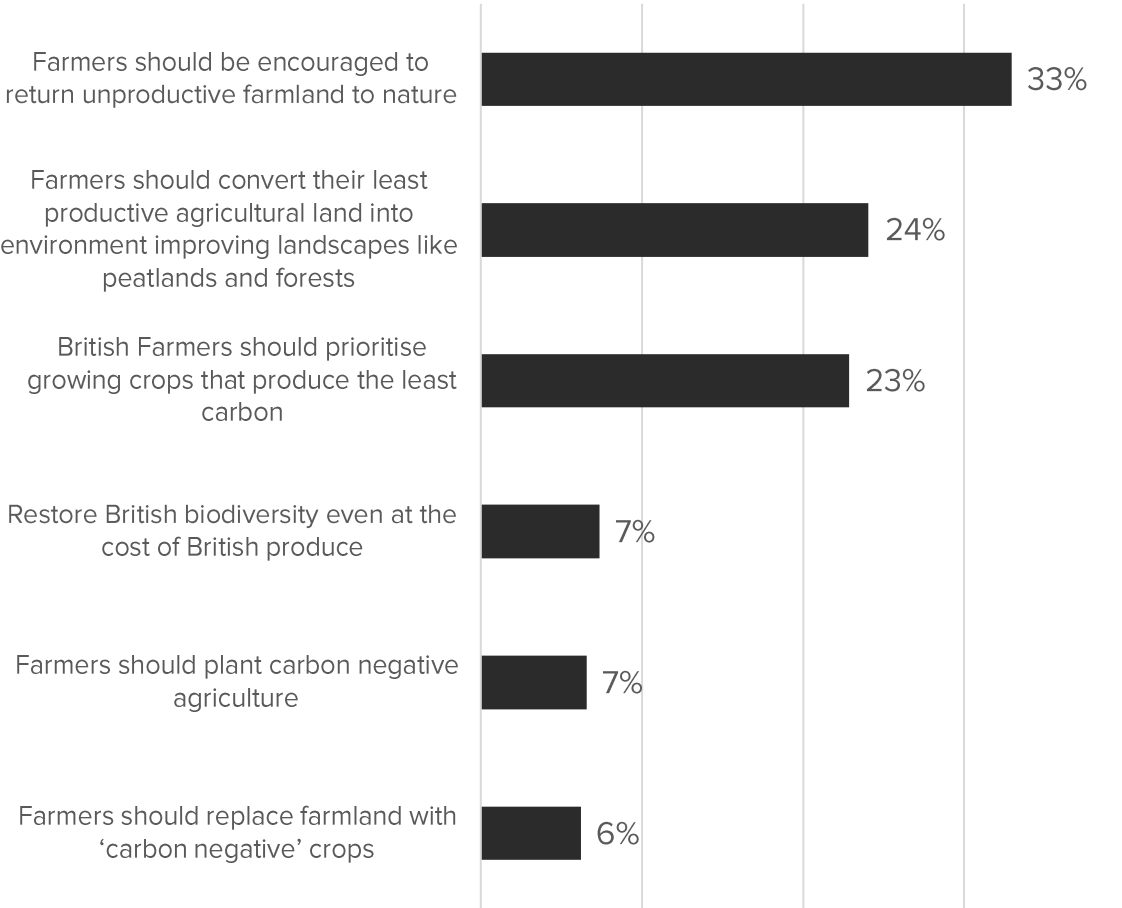


Language Testing (Environment & Nature)

Environment

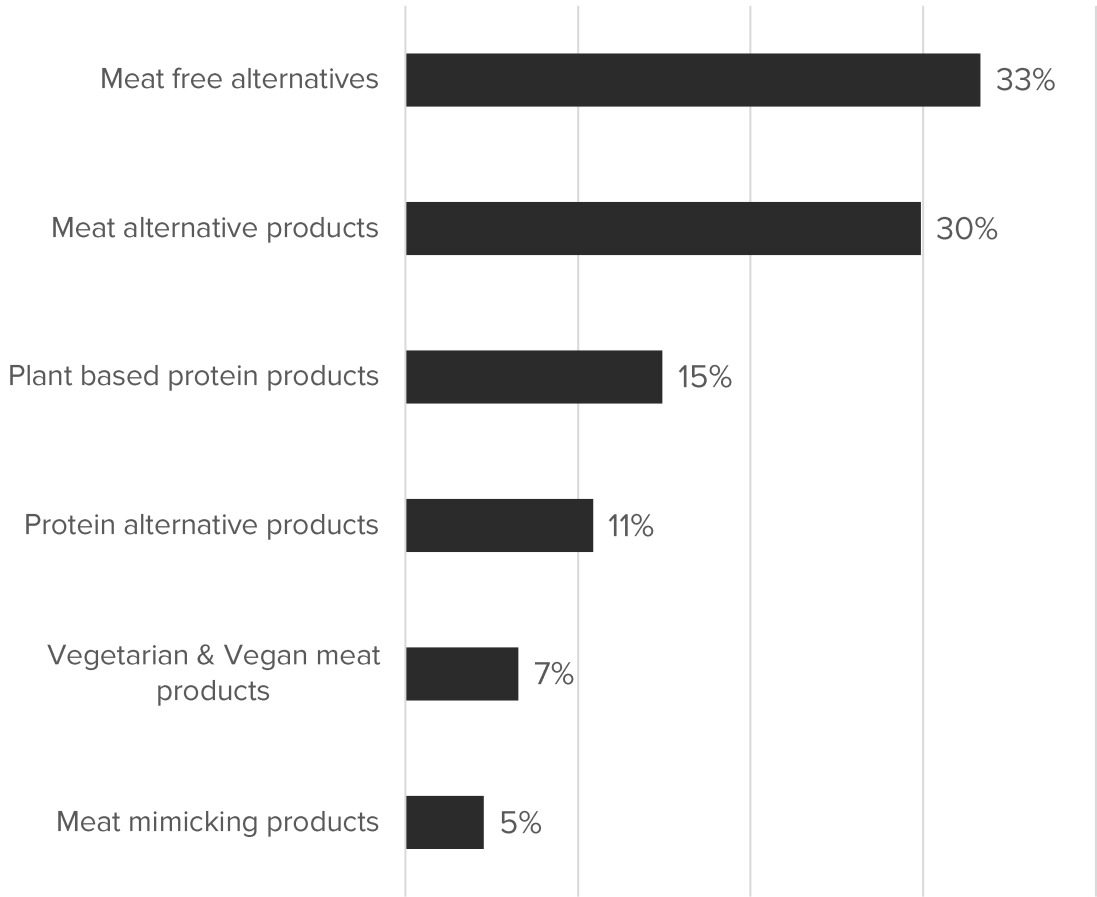


Naturalising Farmland

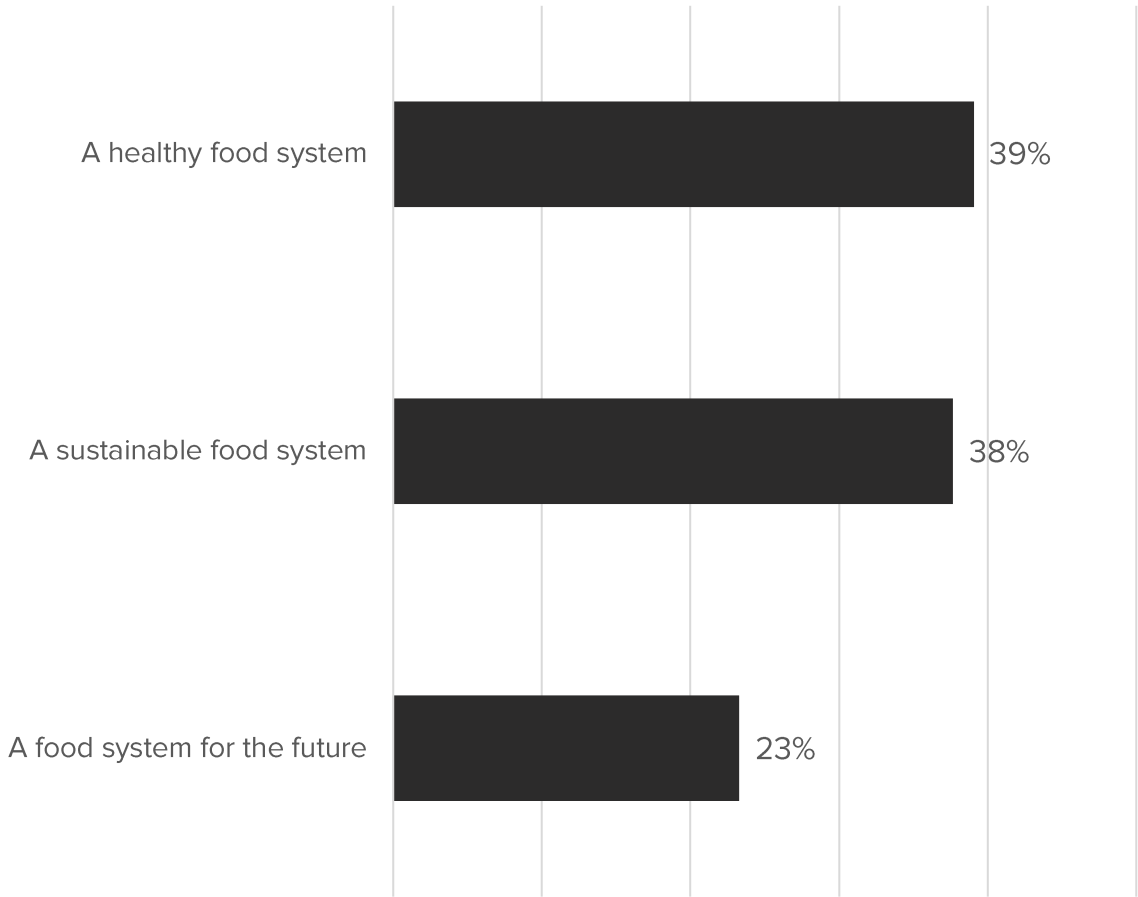


Language Testing (Food Phrasing)

Meat Alternatives



Food System





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