

Consumer Views of Potential Regulatory Divergence in the Meat Sector

Ipsos UK

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FSA Research and Evidence

Executive Summary

About this research

- The FSA's Operational Transformation Programme (OTP) is modernising the ways in which the Official Controls process is delivered in the meat sector, ultimately aiming to increase standards across the industry, protect consumers and support businesses.
- To inform the programme and understand the potential impact of regulatory change if England and Wales were to diverge from inherited EU regulation, the FSA commissioned Ipsos UK to conduct qualitative research with the public to help them capture consumer views towards possible divergence.
- This report summarises the findings from qualitative research conducted with 76 participants from England, Wales and Northern Ireland, who took part in 14 online focus groups between the 19th of July and the 9th of August 2022. Each focus group lasted two hours.
- Our methodology was designed to capture public views towards the high-level proposals of regulatory divergence, highlighting areas of support and concern.

Understanding of the FSA

- Consumer awareness of the FSA was generally high, with participants recognising the FSA's role in ensuring food is safe to eat and hygiene standards are maintained, as well as mentions of animal welfare.
- There was less familiarity with precisely how regulations were enforced. For example, there were questions about how the FSA interacts with other government agencies and local authorities.

- There was also low awareness around the FSA's connection to healthy and sustainable food. Participants were supportive of this new role despite it seeming distinct and separate from the FSA's remit to ensure the safety and quality of food.
- Participants had not considered the scale of the Official Controls process and were surprised at the overall scale of the meat industry in the UK. The continuous presence of Official Veterinarians and Meat Hygiene Inspectors was reassuring and led to some initial resistance towards any potential changes that regulatory divergence might bring.
- It was argued that the FSA should tell the public more about their role and responsibilities and the extent of current regulations.

Views towards the concept of regulatory divergence

- Participants initially struggled to understand the need for regulatory divergence and what form it could take. This was especially true when it came to food safety. Participants tended to assume that food would either be 'safe' or 'not safe'.
- Trust in the FSA was very high and was reflected by participants' beliefs that food would continue to be safe regardless of the regulatory framework in place.
- Despite spontaneous resistance, there was greater support for divergence if it avoided complications for businesses or helped to reduce administration or save costs.
- Generally, participants did not believe that regulatory divergence would have a significant impact on them as individuals. There was indifference towards two products appearing for sale that followed two sets of regulations. Concerns arose when participants felt the impact of divergence could lead to negative changes in the quality of meat products.
- Attitudes towards regulatory divergence were influenced by three key factors:
 - The scale of the change and whether it was perceived as significant or more 'cosmetic'. Significant changes included those which could have a detrimental impact on animal welfare.

- Perceptions of whether an erosion of standards could increase the risks of food becoming unsafe.
- The perceived motivations behind divergence including if changes were being driven purely by a desire to reduce costs.
- Participants did not understand why there would be a need or desire for regulations to be different between the UK nations and argued that having a consistent regulatory regime would be less confusing for consumers, food businesses and for the FSA itself.

Regulatory divergence in practice

- Consumers believed they had the right to know about any changes in regulations and wanted the public to be made aware that regulatory divergence was taking place, for example, through a communications campaign.
- Once informed, participants felt individuals were personally responsible for understanding the effect of divergence and how this could impact them on a daily basis.
- There was less demand for information about specific details of regulatory changes, but signposting to the FSA website could help to streamline this process for consumers who wanted to know more without putting too much information on labels.
- Changing packaging to distinguish between products was felt to be an easy way for consumers to understand regulatory differences when shopping. This could include: sticker systems, traffic light systems, or QR codes that would be able to provide further detail if required. Clear packaging was seen as important to help consumers make an informed choice about what to buy.
- Where changes were perceived as leading to a reduction in standards, participants felt more strongly about the need to be informed. They felt that any divergence that led to a reduction in standards could lead to lower levels of overall trust in the FSA.

How to read this report

This report provides a summary of the insights from the Food Standards Agency's (FSA's) OTP Consumer Panels conducted during July and August 2022. Our findings have been organised in the following structure:

- In Chapter 1 we summarise the background and methodology of the study.
- In Chapter 2 we present participants' understanding of the FSA across the food journey and their role as regulators. We also summarise participants' reflections on the current Official Controls process.
- In Chapter 3 we detail participants' views towards the concept of regulatory divergence, including potential benefits and risks to consumers and businesses. We also detail their specific concerns related to food safety and animal welfare, as well as views on regulatory divergence between the EU and UK and between nations within the UK.
- Finally, in Chapter 4 we summarise participants' attitudes towards potential regulatory divergence in practice, detailing how consumers should be informed, the importance of consumer choice and views on packaging and labelling.

Note on the language used throughout the report

Throughout this report we have referred to “participants” as the individuals that have taken part in our research. We have also used several abbreviations reflecting the topic of discussion:

- AI – Artificial Intelligence
- Defra – Department for Environment, Food and Rural Affairs
- EU – European Union
- FSA – The Food Standards Agency
- MHI – Meat Hygiene Inspector
- OTP – Operational Transformation Programme
- OV – Official Veterinarian

Anonymised verbatim quotes have been used to help illustrate key findings, but these quotes do not necessarily summarise the views of all participants that we spoke to.

Limitations to the research

While every attempt has been made to recruit a varied sample of participants and design a robust methodology, possible limitations to the research include:

- **The research topic.** Talking about food regulation, including the processes involved in the meat industry, is not something participants would normally discuss. The focus groups explored complex regulatory structures and exposed participants to new information they were not aware of. To support meaningful discussions, participants were presented with simplified versions of the Official Controls process, and stimulus materials designed to provide them with the information they needed to engage in the topic. They were given the opportunity to ask questions. However, it is possible that participants' attitudes reflect misunderstandings about the processes involved and it is important to note that participants are not experts in food regulations. For example, participants often focused on quality standards rather than food safety regulations.
- **Generalisability.** The findings summarised reflect the self-reported views shared by the participants. Qualitative research is designed to be exploratory and provide insight into people's perceptions, feelings and behaviours. The findings are therefore not intended to be representative of the views of all people who may share similar characteristics.

Chapter 1. Introduction

Background

The FSA is committed to protecting consumers and ensuring food is safe and is what it says it is. In the meat sector, food businesses are responsible for making sure food is safe and meets required standards, and the role of the FSA is to provide assurance and support to make sure those standards are met through the delivery of Official Controls, ensuring consumer protection and food safety remain a top priority. The FSA's OTP is modernising the ways in which the Official Controls process is delivered in the meat sector to increase standards across industry, protect consumers and support businesses.

The FSA commissioned Ipsos UK to conduct qualitative research to explore and capture consumer views on the impact of potential divergence of a new model in England and Wales from the inherited EU regulation. The

findings of this research will be used to feed into a paper produced for the FSA Board and Business Committee. The main objectives of this research were to:

- Uncover whether consumers have any concerns about regulatory divergence or recognise any potential threats to food safety and/or animal welfare
- Discover potential benefits or opportunities in implementing regulatory divergence
- Understand the extent to which consumers are concerned about products meeting different production standards being available for sale under regulatory divergence
- Establish what assurances or limits would be required for regulatory divergence to be acceptable to consumers

Methodology

Our approach involved a series of fourteen online focus groups conducted between the 19th of July and the 9th of August, each lasting two hours. Focus groups were used rather than workshops because of the associated benefits of bringing together more homogenous groups for discussion given the potential sensitivities of the topic. The first two focus groups acted as a pilot to allow for refinement and development of the discussion guide structure and stimulus materials, based on participants' responses during these initial sessions.

Sample

We recruited 84 members of the public from England, Wales and Northern Ireland, with a total of 76 participants attending the focus groups. [Table 1](#) provides further details about the sessions. More information on the final sample breakdown is provided Appendix 1.

Table 1. Focus group schedule and total number of participants

Date	Region	Area Lived In	EU Referendum Vote / Political leaning	Total no. of participants
19 July 2022	England	Rural	Leave	6
19 July 2022	England	Rural	Leave	6
21 July 2022	England	Urban/Semi-Urban	Remain	6
21 July 2022	England	Urban/Semi-Urban	Remain	6
25 July 2022	England	Rural	Remain	6
25 July 2022	England	Urban/Semi-Urban	Neither Leave nor Remain	5
26 July 2022	England	Urban/Semi-Urban	Leave	6
26 July 2022	Wales	Urban/Semi-Urban	Remain	5

Date	Region	Area Lived In	EU Referendum Vote / Political leaning	Total no. of participants
27 July 2022	Wales	Urban/Semi-Urban	Leave	4
27 July 2022	Wales	Rural	Leave	5
28 July 2022	Northern Ireland	N/A	Unionist	5
28 July 2022	Northern Ireland	N/A	Nationalist	5
01 Aug 2022	Northern Ireland	N/A	Neither Union nor Nationalist	6
08 Aug 2022	Wales	Rural	Remain	5

Quotas were set on region of the UK. For those in England and Wales, there were quotas on the type of area lived in, how the participant voted in the EU referendum and on how positive or negative they feel towards the Brexit transition now. In Northern Ireland, groups were split by political affiliation as attitudes to Brexit are closely aligned with whether participants identify as Nationalist or Unionist. There were additional quotas on age, gender, ethnicity, socio-economic group, and number of children in the household. There were a mix of regular meat eaters, occasional buyers and vegetarians.

Session design

The first half of the focus groups explored awareness of the FSA and their role as a regulator. Participants discussed their current meat purchasing habits, after which we discussed the food journey and the current Official Controls process. We then introduced the concept of regulatory divergence and shared a definition of what regulatory divergence might look like in the UK.

The second half of the group discussions explored a number of possible examples of what future regulatory divergence could look like in practice. The first example discussed differently regulated products appearing together for sale; the second example described a change in water temperature used to disinfect meat handling tools and the third example described the potential greater use of AI or plant staff monitoring animal welfare instead of Official Veterinarians (OVs). Presenting the examples to each group allowed participants to explore the potential benefits and challenges of regulatory divergence within specific hypothetical scenarios. The sessions concluded with participants voicing their priorities and final reflections for the FSA.

Our proposed methodology reflected the low levels of consumer awareness about the Official Controls process and food regulation in general. Discussions focused on the meat industry as the largest sector

covered by the FSA's Official Controls. The design was aimed at capturing public views towards the high-level proposals of regulatory divergence, highlighting areas of support and concern.

Chapter 2. Understanding of the FSA

Participants had a general awareness of the FSA but queried more specific aspects of their work.

Across discussions, consumer awareness of the FSA was generally high, with most participants aware of the FSA as a government organisation and demonstrating an overall understanding of its remit. There was a recognition of the FSA's role in ensuring food is safe to eat and hygiene standards are maintained, as well as mentions of animal welfare. Participants believed the FSA checked processes throughout the production, distribution, and sale of food, although there was not often a clear understanding of this journey.

"I imagine they are present from the beginning to the packaging and sale of food, to the end of the line, the cooking and distribution of it." Northern Ireland, Unionist

There was a widespread belief that FSA standards and regulations are enforced at any location that prepares and sells food. For example, through routine testing, inspections, hygiene ratings and labelling such as best before dates on packaging. Participants also suggested the FSA would play a role in ensuring animals were treated and slaughtered humanely. For one participant, knowledge of this was aided by a connection to someone who worked in the industry. Another participant felt the FSA's work was particularly important for religious groups, who needed to trust that how their food is produced adheres to their beliefs.

"[It's important for] different religious groups who don't eat for example pork or different animals, to [not] end up having something that isn't what they thought it was." England, Urban/Semi-Urban, Neither Leave nor Remain

There was greater confusion about how the FSA enforced regulations.

Participants questioned how the FSA interacted with other government agencies and local authorities in applying regulations in practice. There was uncertainty about the FSA's role in hygiene ratings and how this interacted with council responsibilities. Participants were also unsure whether the

FSA could apply penalties as part of their work and how much power they had over enforcement. There was some concern the FSA would not be able to inspect the number of businesses involved in producing food.

“I’m not sure how much power they have, how physically they get involved in making things happen. My understanding is that they’re not really enforcers.” England, Rural, Leave

In some cases, participants discussed the FSA’s responsibilities for communication. There was a suggestion that the FSA was responsible for communicating any changes to legislation. One participant queried whether the UK leaving the EU would have an impact on the FSA’s remit.

“I’m intrigued now post-Brexit who they are answerable to. Who’s policing them? We never seem to get any public debate on their rules and what’s permitted. It concerns me that we don’t seem to have a public debate about it really.” England, Urban/Semi-Urban, Remain

There was less awareness of the FSA’s connection to healthy and sustainable food.

Participants were not surprised by the description of the FSA as “an independent government department working to protect public health and committed to protecting consumers by ensuring food is safe and is what it says it is”. This matched participants’ expectations, with a suggestion that the FSA’s role was often taken for granted. Participants felt this demonstrated an inherent trust around the governance of food production within the UK.

“We probably take it for granted and assume it’s going on in the background but haven’t given it a lot of thought.” England, Urban/Semi-Urban, Neither Leave nor Remain

In contrast, participants were less aware of the FSA’s involvement in ensuring food is healthy and sustainable for the future, a new pillar of the [FSA’s 2022-2027 Strategy](#). Participants noted they thought the FSA’s focus was around ensuring the safety and quality of food, with standardised procedures to inspect this. In contrast, sustainability seemed distinct from this remit, although participants were supportive of this new role.

“I’m impressed that they are here to make sure [food is] healthy and more sustainable. It’s nice [the FSA] doesn’t just stop to check the food is of high quality.” England, Urban/Semi-Urban, Leave

Participants from Northern Ireland questioned why Scotland is not covered under the FSA's remit. Questions were also raised about the crossover between the FSA and other government bodies like Defra, specifically in relation to goals around sustainability. These discussions were not seen as widely in the English and Welsh groups.

There was an acceptance that meat and vegetables would be regulated differently.

Participants believed that meat would be more closely monitored for diseases, and vegetables for pesticides, with a greater focus on the storage and transportation of meat given concerns about cross contamination. This resulted in a view that meat needed to be more stringently regulated compared to vegetables. This was due to the health risks being higher if something were to go wrong.

"Probably the meat industry is the place it needs to have the highest standard as we need to make sure the things we are eating aren't contaminated like mad cow disease. I suppose the [FSA] should be looking into that." Wales, Urban/Semi-Urban, Leave

Participants had not considered the scale of the Official Controls process.

The current official controls process



Every year, 2.6 million cattle, 10 million pigs, 14 million sheep and lambs and 950 million birds are slaughtered in the UK.

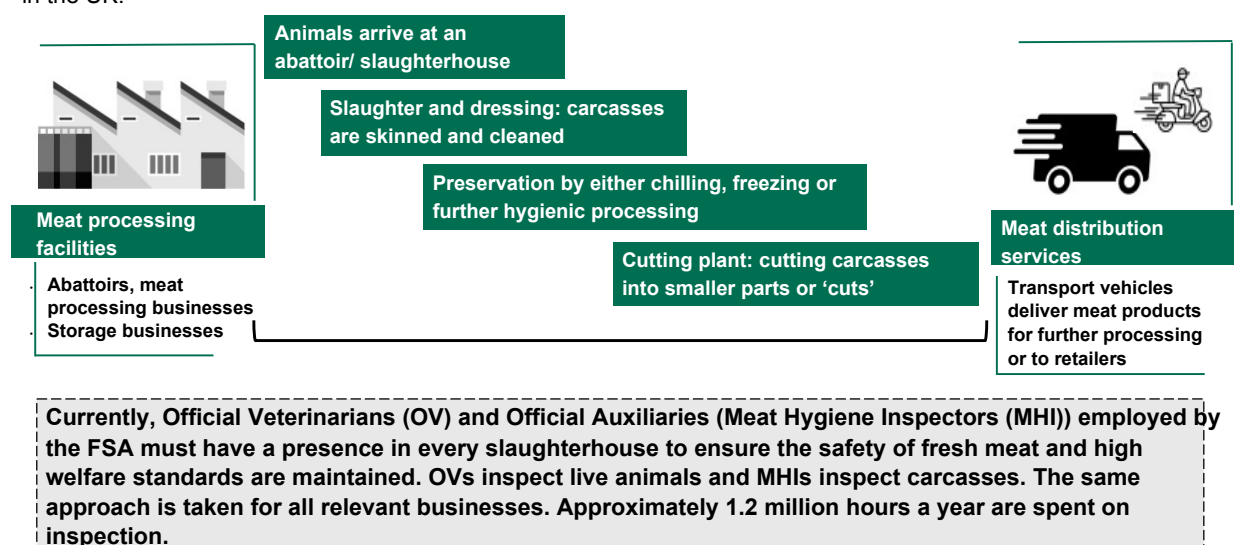


Figure 1. Stimulus shown to participants introducing the Official Controls process

Participants had not thought about the extent to which the FSA is actively involved in the Official Controls process. Although some of the information presented felt unfamiliar, there was a recognition that the procedures sounded appropriate and to be expected. However, participants were surprised at the sheer scale of the meat industry in the UK, both in terms of the number of animals slaughtered and the hours spent on inspection each year.

“950 million birds, oh my gosh. I didn’t know that much about it. I knew there was a standard and I trust in it to be done. For me, it’s just seeing the meat in its packet at the shops.”
England, Urban/Semi-Urban, Remain

The continuous presence of Official Veterinarians was reassuring.

Participants were largely unaware of the continuous presence of Official Veterinarians (OVs) and Meat Hygiene Inspectors (MHIs) at abattoirs, suggesting they believed businesses would be spot-checked by the FSA instead. This provided participants with reassurance that inspections were more stringent than previously believed. They supported the presence of OVs and MHIs to ensure consistency in the processes being followed and that standards would not fall at any time.

“It’s quite reassuring that I know what I’m feeding my kids is good quality.” England, Rural, Remain

In some cases, participants argued that the FSA should tell the public more about their role and responsibilities across the Official Controls process. They suggested the FSA’s work appeared broad and detailed, but that participants had very little understanding of the extent of the regulations in place.

“I think what they are doing is quite important, so I think it should be more advertised. It seems they are doing a good job and they are doing this much and spending so long, and we don’t know anything about it.” Wales, Urban/Semi-Urban, Leave

There was resistance to changes to the Official Controls.

As a result of learning the processes in place for regulating meat were higher than expected, participants felt something could be lost when suggestions were made about future changes. This may reflect an anchoring bias, where the first information one learns about a subject is then used as a strong ‘anchor’ for subsequent decision making, even when

new information is introduced.¹ In some cases, participants acknowledged this. They suggested other consumers would be in the position they were before taking part in the focus group, and so changes made to regulations may be less concerning to the general public.

Chapter 3. Views towards the concept of regulatory divergence

Participants initially struggled to understand the need for regulatory divergence and what form it could take.

What is 'regulatory divergence'?



Following the EU Exit, the FSA are interested in exploring opportunities that the UK now has to change and modernise how food is regulated. This could mean that different regulations apply in different parts of the UK. This could be because Northern Ireland will continue to follow EU regulations, while England, Wales and Scotland will follow UK regulation, or because England, Wales and Scotland do not make the same changes as each other.

Currently, most UK regulations are the same as EU regulations. However, this could change in the future if the EU made changes to their regulations, or if the UK changes our current regulation. This is known as 'regulatory divergence'. This could mean that some food businesses need to comply with both UK and EU regulations, depending on which market they are producing for. This could be expensive for businesses, as it could mean they need to run two production lines. In this scenario all products in UK shops will all be produced to UK regulations.

One alternative is that food businesses could be allowed to choose to comply with either UK or EU regulation for the UK market when these regulations are different. This would mean they could still sell their products in the UK by complying with EU regulations that could be different from those in the UK. In this scenario, two products that appear to be identical in a UK shop could be sold, even though they have been manufactured to different regulations.

It is worth mentioning that no decisions have been made about whether there will be any divergence from current controls, or the extent of any divergence. This work is currently underway and this research will feed into these considerations.

Figure 2. Stimulus material used in the groups to describe regulatory divergence.

After being presented with a description of what regulatory divergence is, participants understood the options being considered by the FSA. However, they were cautious about revealing any strong opinions without first understanding why regulatory divergence might be desirable and what the impact could look like in practice. They felt their views would depend on what differing regulations meant for processes or behaviours in the meat industry, and for them as consumers.

¹ Furnham, A., and Chu Boo, H. (2011) A literature review of the anchoring effect, The Journal of Socio-Economics, Vol 40, pp. 35-42

Especially when it came to food safety, participants tended to see standards as either 'safe' or 'not safe'. This meant they did not understand why there were differences between the way products were regulated in different countries in general. This reflected participants' limited understanding of risk-based assessments and their trust in the FSA that UK food would continue to be safe to eat regardless of the regulatory framework.

"It isn't an opinion, these are facts. You have to keep meat at a certain temperature, you have to feed sheep in a certain way and cut it in that way. These aren't people's opinions... these are scientific facts... I don't get it." Wales, Urban/Semi-Urban, Leave

Political attitudes shaped perceptions, although both Leave and Remain groups were initially resistant to divergence.

In the Remain voting groups, as well as the Northern Irish groups across voting tendencies,² there was a strong belief that consumers trust current regulations developed by the UK and other member states whilst in the EU. Participants questioned why the FSA would change the UK's approach to regulation if the rules were fit for purpose and were felt to suit the landscape of producers supplying meat both within and beyond the UK. This meant they were reluctant to accept regulatory divergence, preferring the UK continued to align with EU regulation. There was limited understanding that divergence would also occur through the EU making changes which were not applied to the UK regime.

"It seems complex for complexity's sake. I understand we are diverging from the EU but wouldn't it make sense to align with the EU? Then, nobody has to worry if one of the two different regulation layouts is more stringent than the other. If it's good enough for the EU, it's good enough for the UK." England, Urban/Semi-Urban, Remain

The idea that businesses might be able to choose between EU and UK regulations strengthened the view of participants in some Remain voting groups that regulatory divergence was essentially redundant. These participants found it difficult to understand why the UK would decide to

² Northern Irish groups were not split by Leave/Remain vote but by Unionist/Nationalist voting tendency. All Northern Irish groups felt negatively towards the idea of regulatory divergence from the EU.

implement different regulations if it did not believe all businesses should follow these rules. As such, they argued the UK should instead continue to follow EU regulations, avoiding the need for divergence.

“I think it undermines the point of having divergence if you can pick.” England, Urban/Semi-Urban, Remain

Participants in Leave voting groups in England often argued that if food was to be sold in the UK it should be produced to UK standards. As such, they did not feel that businesses should be able to choose between different sets of regulations. These participants felt that divergence meant regulations could be better targeted to UK needs, although no specific examples of this were given. They also argued that the UK could be more responsive to new scientific research because of no longer having to go through EU processes for changes to be made. However, Leave voting groups in Wales were less concerned about the need for regulations to be set by the UK.

“If it’s in the UK, you need to adhere to these regulations.”
England, Rural, Leave

There was greater support if divergence avoided complication for businesses.

Although there was spontaneous resistance to the concept of regulatory divergence, on further discussion participants could see some benefits. They tended to feel that having two sets of accepted regulations in the UK was preferable to businesses maintaining two production lines, if producing food for both UK and EU markets. Participants felt that two production lines would add complexity and cost for businesses, which would make food prices more expensive. They felt a potential benefit of regulatory divergence would be reduced administration or saved costs for food producers, in particular farmers, emphasising the need for savings to be passed down to consumers.

“Personally, if there was enough of those criteria where the safety is still met, like the 72 and 82 degrees, and those costs that could be saved by the farm or abattoir, and then also some of that could be passed to us that would be even better so we can afford the food.” England, Urban/Semi-Urban, Remain

Participants did not believe regulatory divergence would have a significant impact on them as individuals.

There was a degree of indifference towards products following two sets of regulations being available in UK shops. Participants did not believe this would have a significant impact on them as individuals as they expected there to be few differences between the two regulations and assumed both would ensure food safety.

“As long as it’s safe to eat, and the regulation aren’t going to make a big difference, I don’t see it being a big problem, as long as it’s clearly marked, UK or EU. If I wanted to feed my kids a chicken breast that is EU or UK, it’s down to me to make that decision. They’re both safe to eat but there will be slight changes. As long as they’re clearly identified, it’s not a problem.” England, Rural, Remain

Participants’ views on regulatory divergence were more strongly negative if changes to regulations were seen as significant, or if they felt it would lead to reduced standards. Participants tended to conceptualise regulatory divergence as resulting in either better or worse standards. The idea that changes to regulation might be considered different rather than necessarily higher or lower was difficult for most participants to grasp. Those who did accept this, were content with a difference as long as they were informed. This meant that, in general, participants felt consumers might not care or notice if changes in regulations led to overall improvements. However, consumers would likely be more concerned if changes led to reductions in standards.

Views were influenced by perceptions of the scale of the change and the risk of a reduction in standards.

Participants distinguished between changes that might seem more ‘cosmetic’ and those which could have a greater impact on consumers. However, they struggled to articulate with certainty what was a big or a small change, reflecting their limited understanding of the Official Controls process.

“It depends on the difference in the regulations. If they’re small, get on with it. If it’s big, then maybe it’s a problem.” England, Urban/Semi-Urban, Neither Leave nor Remain

When introduced to specific examples, participants often argued that lower water temperatures for washing tools was a small change compared to trained plant staff or AI replacing the inspection role of OV's in abattoirs. This reflected whether they felt the change could have a detrimental impact on food safety or animal welfare. For example, participants trusted that a water temperature change would not make a difference to the safety of the meat being prepared, as there was scientific evidence to prove the food would still be safe. In contrast, participants did not trust that changing the way animal welfare was monitored would leave animals unaffected.

Participants did not distinguish between changes to standards and changes to the way standards were enforced or monitored. In the example of trained plant staff or AI replacing OV's in abattoirs, there was repeated criticism that this would lead to an erosion of standards, without high-skilled external and independent monitoring. This was despite reminders that the standard itself had not changed.

"We don't know enough about it, and although it says the animal welfare standards would remain unchanged, I don't know. Something of me doesn't trust that." England, Urban/Semi-Urban, Remain

Participants who accepted safety as a spectrum (rather than a binary 'safe' or 'not safe'), framed their views in terms of risk. For example, one participant spoke about the need for a 'benchmark' referring to the lowest standard to ensure food would be safe. Participants generally wanted there to be some distance between this lowest safe standard and where the regulations were set. They feared that regulatory divergence was an ongoing process, which could result in a gradual lowering of standards. This was because they were concerned that reducing costs would be prioritised against safety.

"I wouldn't want them to cut costs and cut corners and think, 'We'll try [water temperature] at 64 [degrees].'" Northern Ireland, Nationalist

There were concerns about changes that were motivated by cost savings alone.

Participants were sceptical about the motivations for regulatory divergence and felt more strongly negative if changes were being driven to save costs for businesses. They expressed concerns about changing regulations to reduce costs, especially where they felt these outweighed other priorities such as animal welfare. There was an assumption that the UK would be more likely to change regulations to decrease rather than increase costs for businesses, as this was an argument made by those campaigning for EU Exit. Participants felt that making changes on this basis would result in

decreasing public trust in food safety. Similarly, there were also concerns that changes were being made for political reasons to visibly enact EU Exit, rather than to support UK businesses or consumers.

“You trust the regulation for a reason, they are doing things for the right reason. But if it’s about cost, then the trust has been eroded and changes need to be for the benefit of the consumers.” England, Rural, Leave

In contrast, participants were more supportive of measures seen as motivated by sustainability concerns, for example reducing water temperatures for washing tools. They recognised the potential reduction in energy usage and costs, highlighting how this could support the UK’s Net Zero commitment and reduce financial burdens on businesses.

“It sounds like there isn’t a negative for going to 72 [degrees – water temperature]. It’s equivalent in health, saving energy, potentially making the meat cheaper and it’s more sustainable. There’s no negatives.” England, Urban/Semi-Urban, Remain

Participants worried about the impact of regulatory divergence on the quality of meat products.

A key concern focused on the perception that the quality of food products could decrease, where quality also related to animal welfare. This reflected participants’ views that regulatory divergence would be focused on cost-cutting. It was less common for participants to mention concerns about a reduction in food safety standards, as there was an assumption the FSA would continue to ensure food was safe to eat.

“If you could choose to comply with UK or EU, you’ll probably go with the one that is less regulatory and cheaper to implement. Which is not necessarily of higher standards. So, you might be getting food that’s not of the right standard, and you wouldn’t know, unless it’s highlighted.” Northern Ireland, Neither Unionist nor Nationalist

Although, the possibility of the UK increasing quality standards compared to the EU was mentioned, this was not a view commonly held by participants who tended to be sceptical about the UK implementing regulations that raised standards. In some cases, participants felt divergence could lead to an increase in consumers buying British meat, as long as there were not large differences in price as a result.

“The benefit has to come from more quality standards, more premium meat, but I doubt that would ever happen.” England, Rural, Leave

Participants wanted regulations to be the same across the four nations of the UK.

Participants did not understand why there would be a need or desire for regulations to be different between the UK nations. They argued that having a consistent regulatory regime would be less confusing and reduce complexity for food businesses and the FSA. Participants found it difficult to understand why different regulations would be needed, given food safety affects consumers equally across each of the four nations.

“If the FSA is set up to protect public health, why would it be different in different regions? Would public health not be the same in all regions?” Northern Ireland, Neither Unionist nor Nationalist

Very few participants were aware of current differences between nations, although variation in the regulation of Genetic Modification (GM) in food was raised in one group. There was little specific mention of the Northern Ireland protocol or further devolution in Wales. Although, those in Northern Ireland sometimes raised concerns about the competitiveness of Northern Irish producers when exporting to the rest of the UK and concerns about food price rises for Northern Irish consumers.

Participants felt that having different regulations between nations would be difficult in practice because of the porosity of national borders and high levels of trade across them. They were concerned about this leading to an unfair playing field between the different nations, with some getting a competitive advantage, if regulations in one nation were less costly to adhere to. There was also concern that differences would come down to cost, rather than the context of each of the nations, and that this could erode food standards.

“I do think it could be potentially dangerous, [each nation] having different rules. I think it’s going to be down to costing and what’s going to be cheaper instead of what’s best for the consumer.” England, Urban/Semi-Urban, Remain

In contrast, it was felt that regulatory divergence within the UK opened the possibility of a more localised food system, which was seen as a potential benefit. Participants described shorter food chains, more shops selling local produce, and greater control and supervision over where food has

come from. One participant also felt that Northern Ireland needed different regulations due to the unique position they are in related to the EU.

There were no clear differences in views across groups in England, Wales and Northern Ireland.

Participants across the UK identified potential benefits and downsides of regulatory divergence for businesses, consumers and the FSA. They also described the potential implications for animals and the natural environment, seeing this as an area where the UK could develop regulations that reflected the context and priorities of the country.

Table 2. Summary table of potential benefits and downsides identified by participants.

Affected group	Potential benefits	Potential downsides
Businesses	• Potential for savings in cost and administration if UK regulations are less costly or stringent to adhere to • Regulations could be more tailored to the UK context and needs of UK businesses • Choice for businesses to follow regulations that reflect their needs and export markets	• Increased complexity • Northern Irish producers could become less competitive if UK regulations are less costly or stringent to adhere to, but this is not implemented in Northern Ireland • Competitive disadvantages for businesses in some nations if regulatory divergence occurs between UK nations
Consumers	• Potential for cheaper food prices if savings are passed onto consumers • Potential for UK regulations to improve standards in food processing	• Complexity when shopping if two sets of regulations accepted • Potential for higher food prices. This was attributed to increased complexity and the cost of implementing any change for producers (e.g. new labelling systems), or if regulations were made more stringent and required investment in processes • Potential risk to public health and safety if regulations on food safety and animal welfare were relaxed

Affected group	Potential benefits	Potential downsides
Animals and the natural environment	• Potential for the UK to be more responsive to new science and research in setting regulations, including towards sustainability goals • Potential for UK regulations to improve how animals are looked after • Potential for a more localised food system or reduced food miles, with more locally produced food being consumed locally	• Potential for a reduction in animal welfare standards which was seen as unacceptable

Chapter 4. Regulatory divergence in practice

Participants wanted to be informed about the existence of regulatory divergence.

Generally, consumers believed they had the right to know about any changes in regulations and wanted the public to be made aware that regulatory divergence was taking place. This was linked to their feelings about the importance of consumer choice and being able to decide exactly what they purchased. Participants argued that if divergence were to proceed, consumers should have both awareness of what was changing and an active role in deciding what regulations are acceptable. They felt there was a risk that consumer trust in the FSA could decrease if the FSA was not transparent about any changes.

“All the information the consumer has gives them the option to decide what’s best for them. Not that we know a lot about the different regulations. You may have to look into that more but at least you have the information.” Northern Ireland, Neither Unionist or Nationalist

There was a recognition that most consumers are unaware of the Official Controls process or the detail of current food regulations, reflecting participants’ own limited awareness before the discussion group. This led

some participants from apathetic voting groups to argue that it would not be important to inform customers about any changes. These participants did not feel that their choice between two products produced to different regulations on sale together was important, as long as both products were considered safe.

“If the change is small, I probably wouldn’t even bother looking at it.”

England, Urban/Semi-Urban, Neither Leave nor Remain

Participants suggested a communications campaign to tell the public about the changes.

Participants suggested the FSA should develop a communications campaign, mostly through television adverts, to inform consumers that a change to the way their food is regulated would be about to take place. Details of regulatory divergence would not be required, but the campaign could be designed simply to tell the public about the upcoming change.

There were also suggestions of a social media campaign designed for the same reason, not to provide in-depth information about the specifics of regulatory divergence, but to build awareness amongst consumers. It was noted that not everybody has social media, nor watches live television, so the awareness campaign would need to reach the widest audience by being launched across multiple channels. Participants felt these adverts, placed across a variety of media sources, could then signpost the most concerned consumers to the FSA website. There they would be able to read more detailed information about specific changes to regulations and what it would mean for them as a consumer.

“This information should be made public, and people should be aware where it’s coming from and what the standards are.

It shouldn’t be hidden but it should be out there for everyone to know.” England, Rural, Leave

Consumers were seen as responsible for researching the detail of how divergence affected specific products.

Once told about the changes, participants felt they would be personally responsible for understanding the effect of regulatory divergence and would have to research it themselves. Signposting to the FSA website would help to streamline this process for consumers. Participants wanted any divergence to be explained in basic terminology and expected the FSA to make any changes to regulations both visible and in the public domain.

“It has to be clear on the pack what the regulations are. Then it’s up to me to research what those differences might be. The only choice is to do research.” England, Urban/Semi-Urban, Remain

Participants felt the level to which they would want to be informed about specific regulatory changes would depend on the extent of any difference. They felt that smaller changes to regulations that were mostly viewed as cosmetic would have little impact on purchasing habits. This meant participants did not always feel the need to be highly informed of these changes, for example a change in the temperature tools were washed at. As long as food remained safe to eat, groups agreed that their main concerns would be alleviated.

“I think most people wouldn’t care about small changes. Big changes, people do care about, but small things, I can’t imagine how that would affect many people, to know about that.” Wales, Rural, Remain

When changes to regulations were seen as more significant, for example related to perceived changes to animal welfare standards, participants wanted more information to be available about what this would mean for consumers. Across the groups, if regulatory divergence led to a drop in standards, there was agreement that this would impact whether they would continue to buy meat. As such, participants wanted to be able to identify which products followed alternative regulations so they could make an informed decision. While they felt that information should be available on these changes, it should not be done in a way to overwhelm the public.

“It’s down to what’s the change they’re making. And if it does make a difference, what the difference would be compared to what it is now. If it’s something big, then let us know why they’re changing it as well.” Wales, Rural, Leave

Participants argued that packaging should be used to distinguish between products following different regulatory regimes.

Participants generally felt the clearest way to distinguish between products complying with different regulations would be noticeable differences in packaging and labelling. This was felt to be easy for consumers to understand when shopping. They argued it would not be necessary to display items in different sections of supermarkets, but a clear distinction between different products would be essential to keep consumers informed.

"I would want some kind of packaging for [knowing the difference]. Whether it's a blue star for EU and a red one for UK, it gives the consumer an at-a-glance way to know what standard is being adhered to." Northern Ireland, Neither Unionist or Nationalist

The most popular choice mentioned across groups was for a sticker system. This could be through a colour code or a flag system, using the EU or UK flags to highlight which regulatory regime is being followed. There were some concerns this could confuse consumers if meat produced in the UK could have an EU flag on the label as a result of following EU regulations. However, overall participants felt it was more important to be clear what regulations products were adhering to. This reflected the need to provide consumers with choice and help keep them informed of changes in policy.

"I think if we can look at the product and see a logo telling us which regulations it's following and there's a breakdown that would give us the information we need to know." England, Urban/Semi-Urban, Remain

Alternatively, participants described a 'traffic light system', which could inform customers of the level of change, reflecting their distinction between more cosmetic and significant differences. Participants imagined how smaller changes with a green light would symbolise changes of least concern whereas changes labelled as red would highlight to consumers that they may want to look into the regulations before choosing what to purchase. Participants mentioned they currently look for labels such as the Red Tractor symbol, and similar icons or clear systems would help them to make an informed decision on what to buy.

"Maybe what they could do is say, 'Here is a red, amber, green scale'. Red is 'our change is going to be completely different' and a green one, something like 'we're going to wash our tools at a different temperature', and we find out about the red ones because it's a drastic change." England, Rural, Remain

However, there was also a sense that current packaging already contains too much information for consumers to comprehend. Participants described how they are often only looking at the sell-by or best-before date, or the origin of meat, for example whether it is British. They argued that consumers are not always interested in reading detailed information when in a supermarket. Despite this, the consensus was that information should still be on packaging for people who would be interested in finding out more.

“There is so much information on a packing, do you need anymore? Do you need another sticker saying it is from the EU or England? I think there is enough.” Wales, Urban/Semi-Urban, Leave

QR codes could provide a further level of detail for those most concerned.

Participants suggested a potential workaround to the extent of information on packaging would be to include a QR code on labels that links to the FSA or meat producers’ website. This could provide more detailed information to the shopper about the specific regulations for that individual product. Participants felt that using QR codes would balance the requirements of those who just want to buy meat, regardless of the regulation, and those who wanted to be more informed.

“If it had a QR code on each package and we had the regulations of each one and it came up with the comparison thing, that would be a good way.” England, Rural, Remain

Conclusions

Overall, participants did not believe regulatory divergence would have a significant impact on them as individuals. They widely felt food would remain safe irrespective of whether products followed the same or different regulatory regimes. Although spontaneous reactions resisted the concept of regulatory divergence, participants were more accepting if they felt divergence could reduce the burden on food businesses. There were no clear differences in attitudes across the nations, with political views seeming to have a greater influence on perspectives.

A distinction was drawn between more cosmetic changes, which could have a limited impact on consumers, and more significant changes related to a reduction in quality standards or animal welfare. Participants felt the public would be more concerned about significant changes, often assuming there would be reduction in standards. This was influenced by widespread scepticism that regulatory divergence was being motivated by a need for cost saving.

Although participants were not particularly concerned about regulatory divergence in principle, they argued it was important the FSA informed the public about the proposed changes to the regulatory framework. They emphasised the need for transparency, suggesting a communications campaign to inform people about the existence of regulatory divergence. However, participants felt it would be down to individuals to research the specific details of any changes related to particular products.

Participants did not see a problem with shops selling products following different regulations on the same shelf. However, they wanted clear labels on packaging so consumers could tell which regulations a product complied with. This could follow a traffic light system, related to the significance of a change, or include a QR code to signpost to wider information. Clear labelling was seen as important so that consumers could make an informed choice about what to buy.



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Supplementary Materials

Appendices

Download: <https://science.food.gov.uk/article/127179-consumer-views-of-potential-regulatory-divergence-in-the-meat-sector/attachment/257226.docx>
