



Llywodraeth Cymru
Welsh Government

Community Food Strategy Consumer Survey

December 2021

Approach

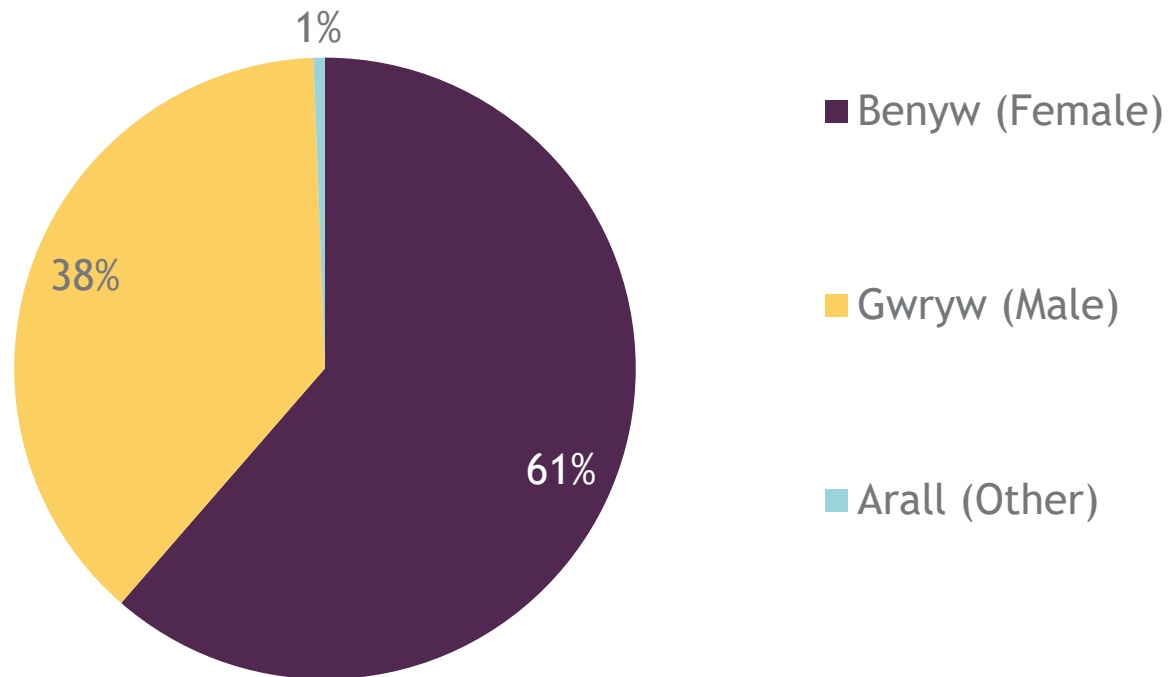
- This work was commissioned by Welsh Government from Four Cymru
- Online survey served bilingually (English/Welsh) to residents domiciled in Wales
- Used Cint panel to achieve results
- Number of completes: 1,018
- Top line analysis: 15 December 2021
- Full analysis and recommendations: 20 December 2021



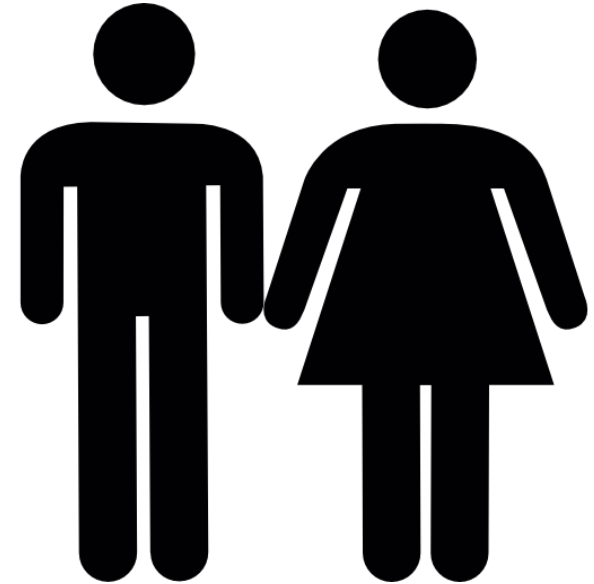
Survey results

Gender split

Q1. Do you identify as...



1,015 respondents

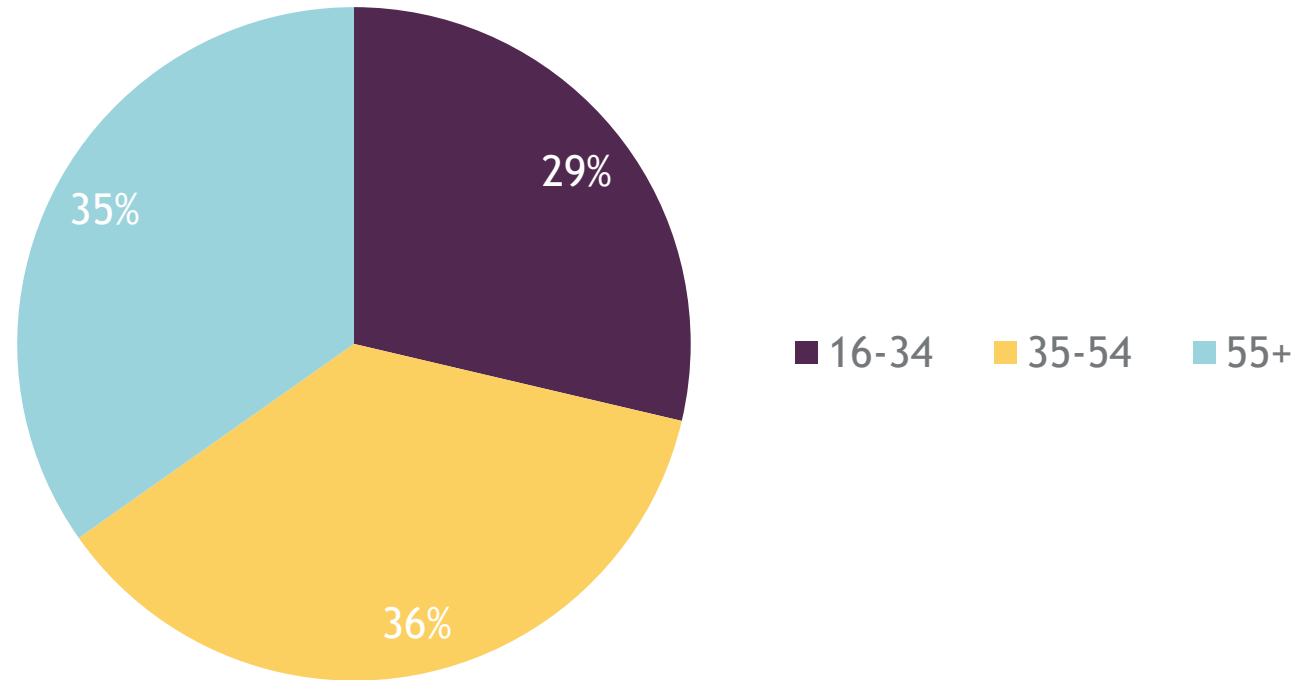


Females make up the majority of responders followed by males.
There was a very small amount of responders who identified as 'other'.

Age split

Q2. How old are you?

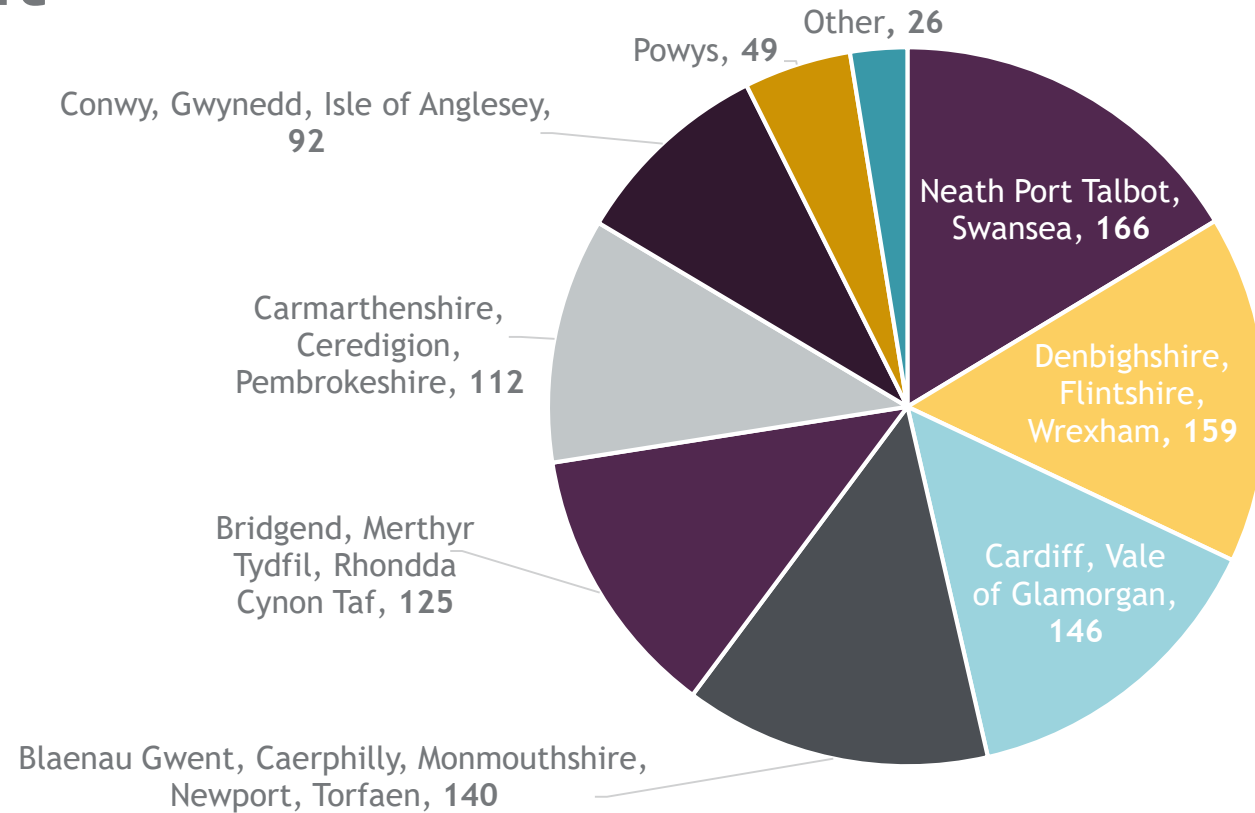
1,015 respondents



No major quantitative differences were observed among the responding age groups. The age group 35-54 made the majority of responders (36%) followed by the age group 55+ (35%). The age group 16-34 had the smallest amount of responders (29%), an indication that people aged over 35 may be slightly more receptive to initiatives around Welsh food and drink

Location split

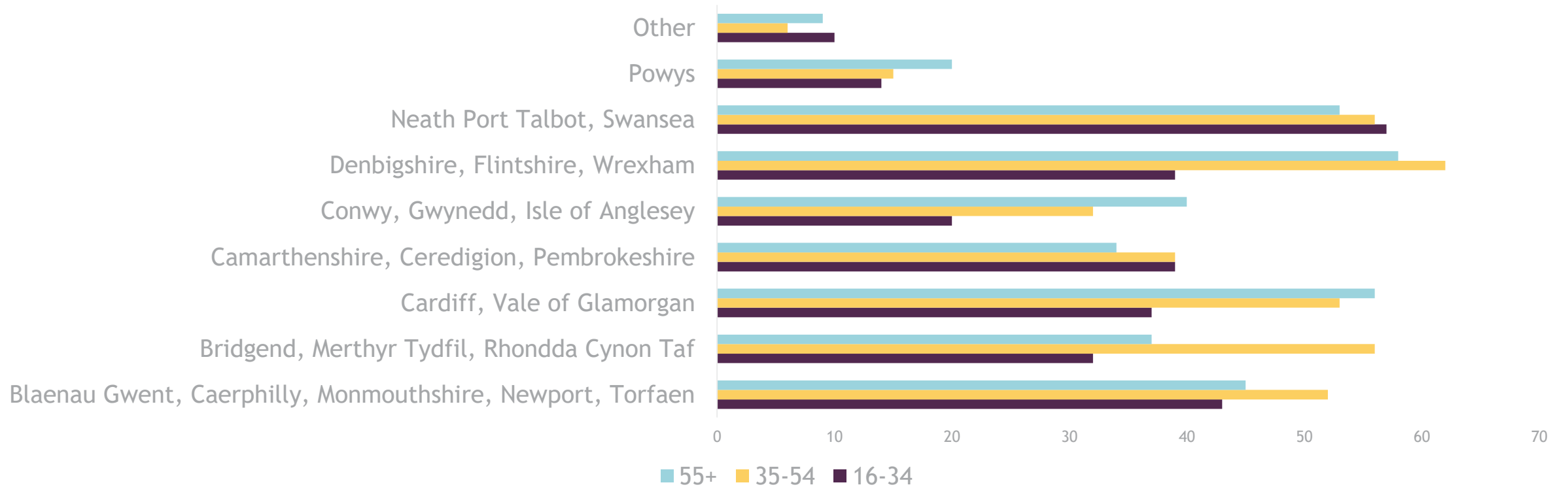
Q3. Where do you live?



The three areas with the greatest number of respondents are from 1. Neath, Port Talbot, Swansea; 2. Denbighshire, Flintshire, Wrexham; 3. Cardiff, Vale of Glamorgan

Age splits by location

Q3. Where do you live?



Age profile varied by region, but the largest amount of the age groups 35-54 and 55+ were from Denbigshire, Flintshire, Wrexham, and the largest amount of 16-34 participants were from Neath Port Talbot, Swansea

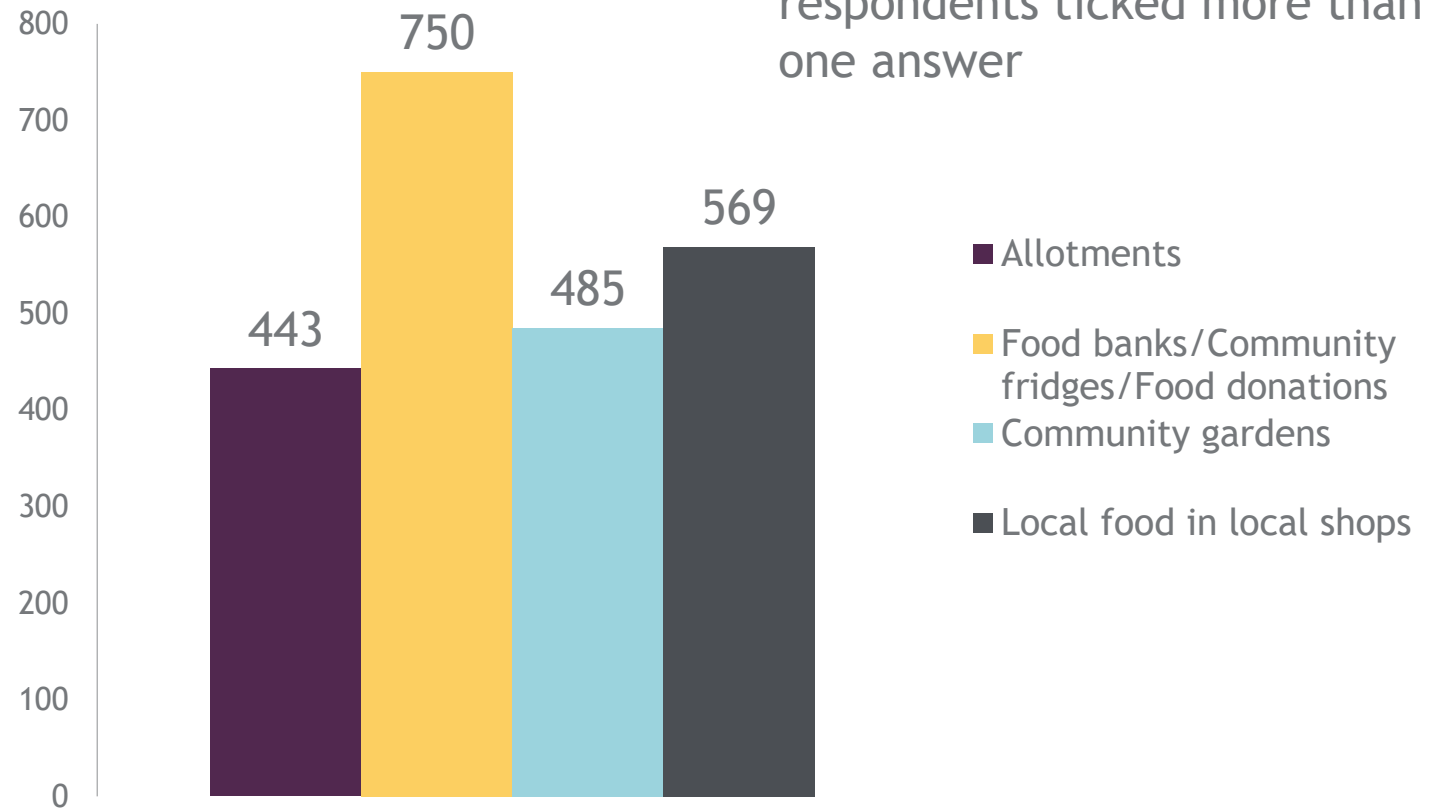
Community food organisations awareness

Q4. Which of the following do you think are part of Community Food ?

992 respondents - many of the respondents ticked more than one answer

Food banks/community fridges/food donations were the most recognisable types of food community 'parts', while local food and shops were the second most recognisable

Allotments received the smallest amount of 'Yes' responses, although there was only a small difference between allotments and community gardens



A small quantity of individuals made other suggestions with some specific projects mentioned

Q4. Which of the following do you think are part of Community Food (other)?



98% of respondents were not aware of any other community food projects

18 individuals gave an answer apart from “n/a” - the majority mentioned farmers markets, while supermarket food donations and free school meals were also mentioned

18 respondents

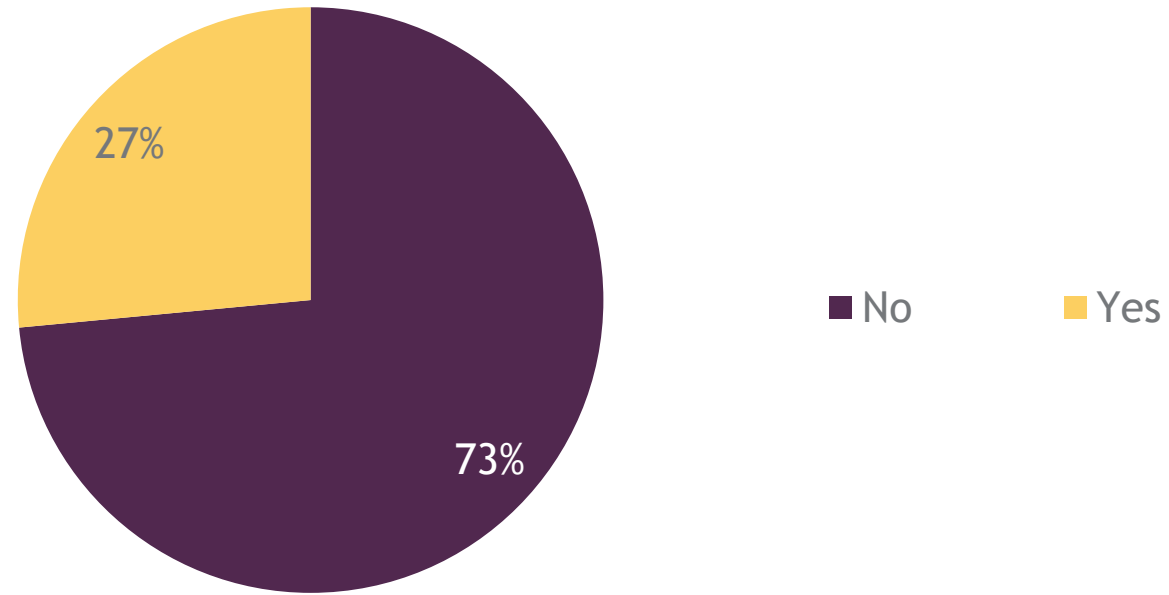
For all regions, Food banks/Community fridges/Donations were most widely known

Area	Allotments	Food banks/Community fridges/Food donations	Community gardens	Local food in local shops
Neath Port Talbot, Swansea	69	130	80	95
Denbighshire, Flintshire, Wrexham	66	115	83	90
Cardiff, Vale of Glamorgan	64	108	67	77
Blaenau Gwent, Caerphilly, Monmouthshire, Newport, Torfaen	68	102	67	71
Bridgend, Merthyr Tydfil, Rhondda Cynon Taf	63	93	59	70
Carmarthenshire, Ceredigion, Pembrokeshire	46	80	55	77
Conwy, Gwynedd, Isle of Anglesey	39	71	45	50
Powys	22	31	23	26
Other	5	17	5	13

Community food initiatives awareness

Q5. Are you aware of any 'community food' initiatives in your local area?
Please add details if known e.g. Castle Acre Allotments, Mumbles, Swansea

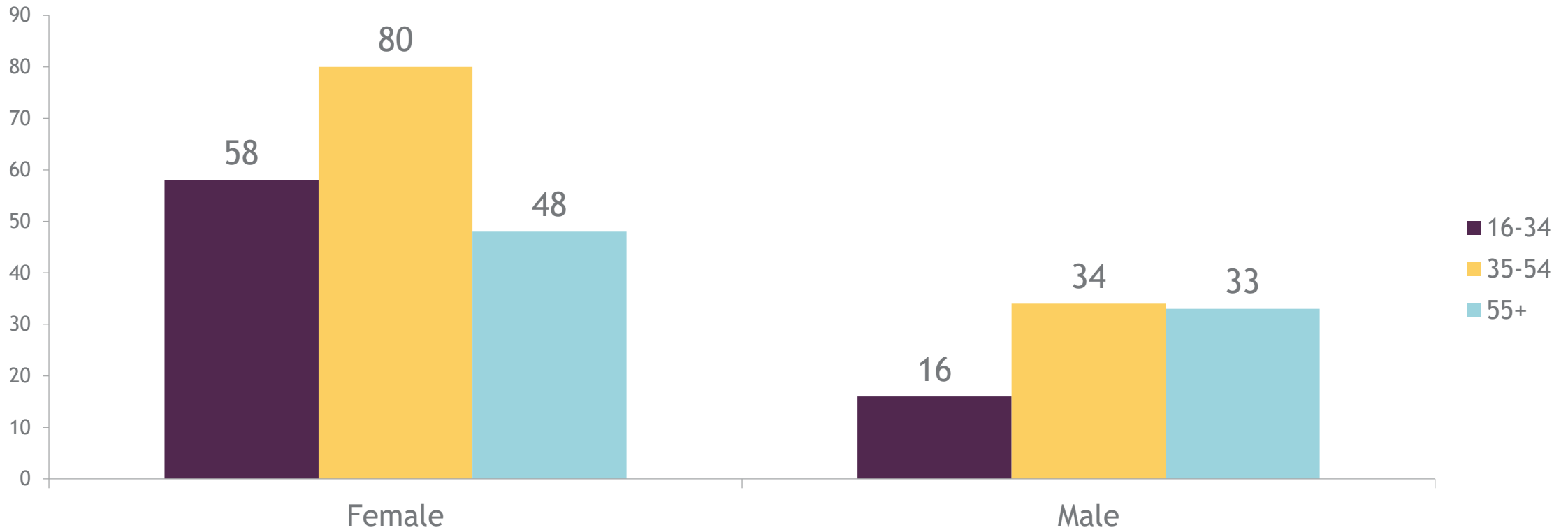
1,015 respondents



Majority of responders were not aware of local community food initiatives

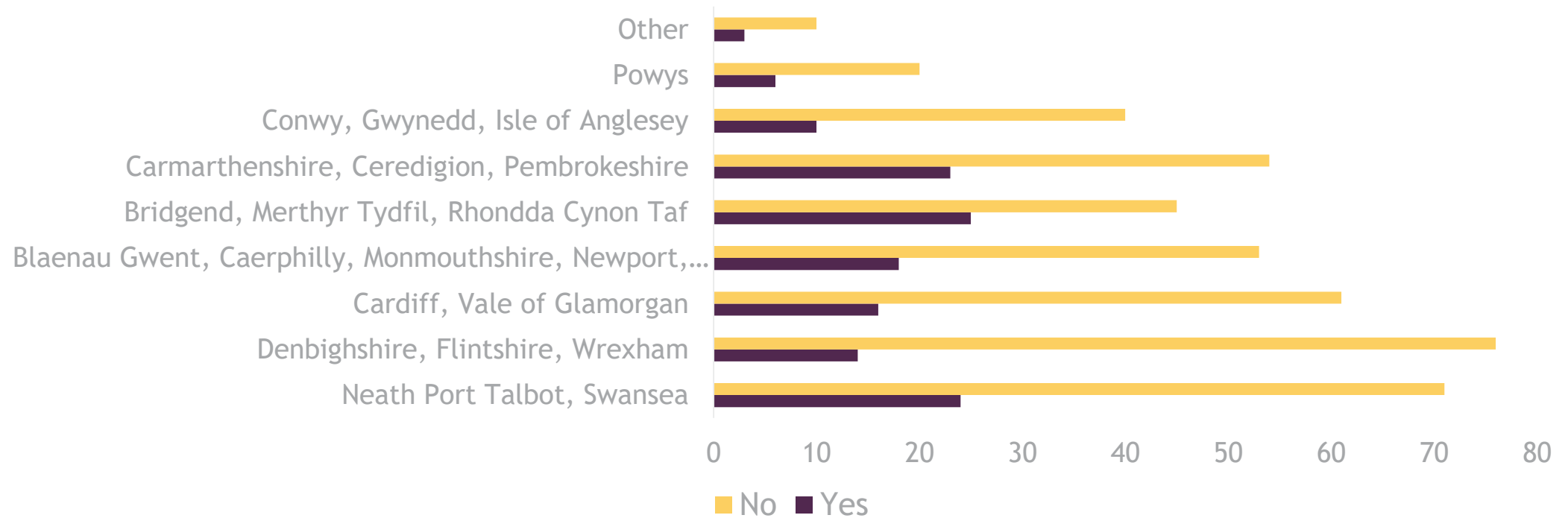
30% of women respondents gave a positive answer, making it the most aware of the two genders

Q5. 'Are you aware of any 'community food' initiatives in your local area?' Those answering 'yes' split by gender and age group



The demographic groups that gave the highest amounts of positive answers were female aged 35-54 and 16-34
Male responders aged 16-34 were the most unaware group around local community food projects

On average 76% of those who answered were unaware of any schemes but this was as high as 84% in Denbighshire, Flintshire, Wrexham



Community food initiatives awareness

Q5. Are you aware of any 'community food' initiatives in your local area? Please add details if known e.g. Castle Acre Allotments, Mumbles, Swansea

From those responding Yes (27%) - they were aware of the following:

- Foodbanks 38%
- Community projects 23%
- Allotments 12%
- Non specific 7%
- Don't know/no comment 20%



Q5. Women who are more aware of community food initiatives are also able to name more examples than men.

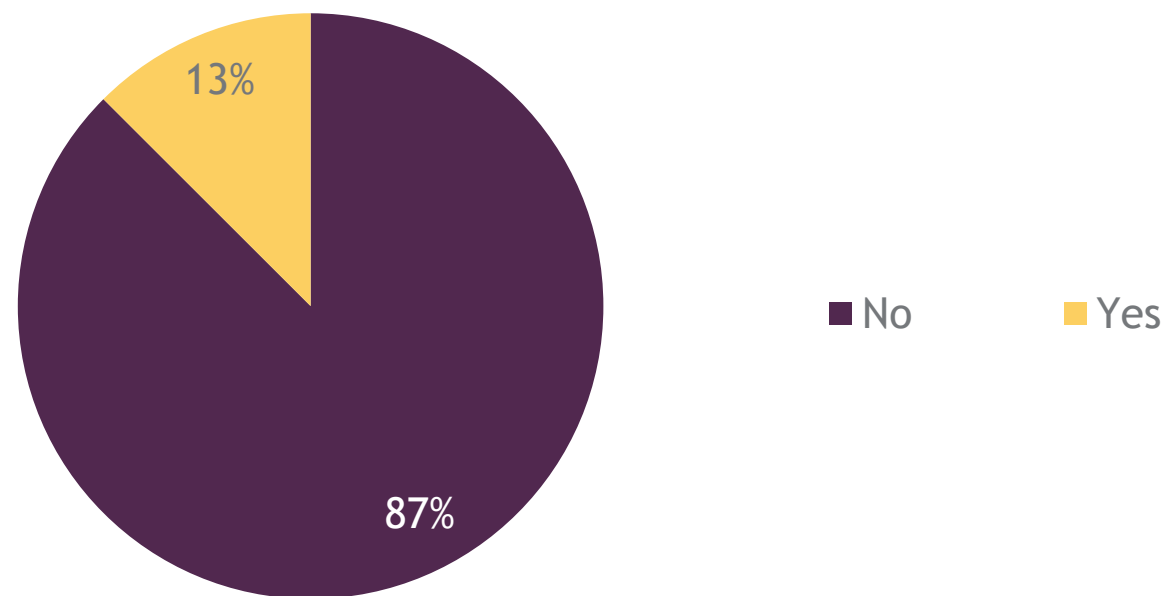
Types of projects ranged from supermarkets taking donations, local food banks and named allotments to specific projects and groups. A number of schemes were named more than once. Below provides a snapshot:

Allotments in Gowerton and Gorseinon. Food bank in Gorseinon. 5 foodbank center in Pembrokeshire. A community kitchen in Swansea. Alive Church. Allotments - Ruabon, Wrexham, Holt etc, Incredible Edible in Wrexham, and the community fridge in Caia Park. Allotments Denbighshire and Fairbanks Sir Ddinbych. Allotments in old Vetch Field. Anglesey County Council run a Christmas food parcel scheme. Lidl have a box next to the tills where they accept donations for local food banks. At the local fairshare they provide you with locally grown fruit and vegetables. Banc bwyd Llandysul. Bank bwyd Wrexham. Beddau Foodbank, Tonteg Foodbank. Bettws food bank Birchgrove and Allensbank allotments. Food bank at Pontyclun. Paradise Run. Brecon food bank. Bwyd banc. Cardiff Foodbank. Castle Acre Allotments, Commuunity Gardens Southend; Local butchers; Mumbles Farmers Markets. CBSA- Llanelli. Russell trust. Circulate. Community Food Bank, Glyn Ceiriog Community Centre. Community fridge and food bags in Morrisons. Community fridge etc, growing gardens being developed, spar doing out of date foods. Community fridge in Fishguard, Food bank in Fishguard. COMMUNITY FRIDGE IN SWANSEA. BLAENYMAES FOOD BANK. Cadlle allotments. COMMUNITY FRIDGE, NEWTOWN. Community fridge, Newtown, Powys. Cultivate, Newtown. Community garden on corpa rd. Community pantry in Cefn cribwr and CAD in north cornelly. Also foodbank facilities in the county. Coop. Croesyceiliog food bank. Cultivate. Cwtch up. Dragon meals for the homeless. Plas Madoc centre gives out £5.00 boxes of fruit and veg, great value. Ecological Land Cooperative, Lunnion. Fairfield allotments. FairShare. Farmer's market at the Butcher's arms. Fforest hub on carmarthen road. Fforestfach community farm. Flintshire council delivered food parcels to pensioners during lockdown. Flintshire food bank. Flintshire Foodbank. Food bank at Gilfach Goch and tonyrefail. Food bank Caernarfon. Food bank cardigan. Community fridge, fishguard. Food bank collected at Pontlloftyn Church. Foodbank collected at Tesco Ebbw Vale. food bank ebenezzer church. Food bank Fishguard. Food bank Glyn Ceiriog. Food bank in kidwelly. Food bank in Mold. Food bank in Newport Town and one on malpas Road. Food bank in Pembrey. Food bank in Pontarddulais and soup kitchen in Swansea. Allotments in Swansea. Food Bank run by local church. Food bank the lighthouse project. Food banks across the county; referrals to such food banks by Pembrokeshire Citizens Advice. Food Banks Cardiff. Food company. Food for Families in need, operating off of food donations. Food Pantry. Food Share. Foodbank in Ammanford. Foodbank in Sketty park. Gardd guminol. Gilfach goch foodbank. Gilfach goch foodbank. Gilfach hoch community centre food initiative. Global Gardens, Heath; Oasis Centre, Splott; StarGar Allotment, Pengam Allotments; soup run in city centre, food provision at homeless shelters, farmers markets. Goo. Gorseinin food bank. Hafod Estate Gardens. Penparcau community hub. Jesus cares. johnstown allotments - Food Banks. Know of the allotments in Castle Acre. Llandrindod food growers. Llanfairfechan community allotment. Llanharan Allotments. Llath a llan. Llefydd i adael bwyd i pobl digatref. Llwyhendy food bank tyisha food bank. Local food bank rhyll. Local group had money from Co-op in the news yesterday but can't recall name. Local produce, including locally brewed beer and cider, is available in the Buckley Co-Op shop. mach maethlon. Mae'n felly pert. Matts house. Mencap gardens. Moelyci allotments and farm shop. Monmouth food bank. Myrtle house food bank. Myrtle house food bank. Need to Feed. Newport food bank. Newport food bank. Newport tin bloom. Newport veterans Hub has an allotment at Ringland. Npt allotments. PATCH. Pengam stargarrallot. Pentreban Food Bank. Pop up vegetable shops, Newcastle emlyn. Rhayader allotments. rogerstone allotments. Salvation army Morriston and Llanelli and Skewen. Several allotment areas around Barry. St John's food bank, food bank in local supermarkets. St Peters allotments. Summit good. Swansea City Community Garden. taff-ely food bank. Tairgwaith foodbank. Tesco customers donating food items. tesco in deganwy are actively working with foodbanks. food donated that would otherwise be wasted. The community garden in Swansea where the Vetch Field used to be. There are several food banks, a fareshare project and olio is active in the area of Aberdare as well. There are some allotments in Rhos on Sea, near the Bryn Eryn Nature Reserve. Tesco is part of the Trussell Trust and has a place in store for customers to donate food. There is a community food garden. In Mayhill Judy off North hill road. There is a donation box in my local Co-op. Tin on the wall. Tir-y-berth. Tonypandy allotments. Too good to go. Ty hapus. Tyshia food bank, burry port food bank, pembrey food bank. Winston road church. yes locally on Anglesey. Yrdd center and local schools. Ystrad mynach church offers affordable products where you can fill a bag for £2.50

Community food initiatives participation

1,015 respondents

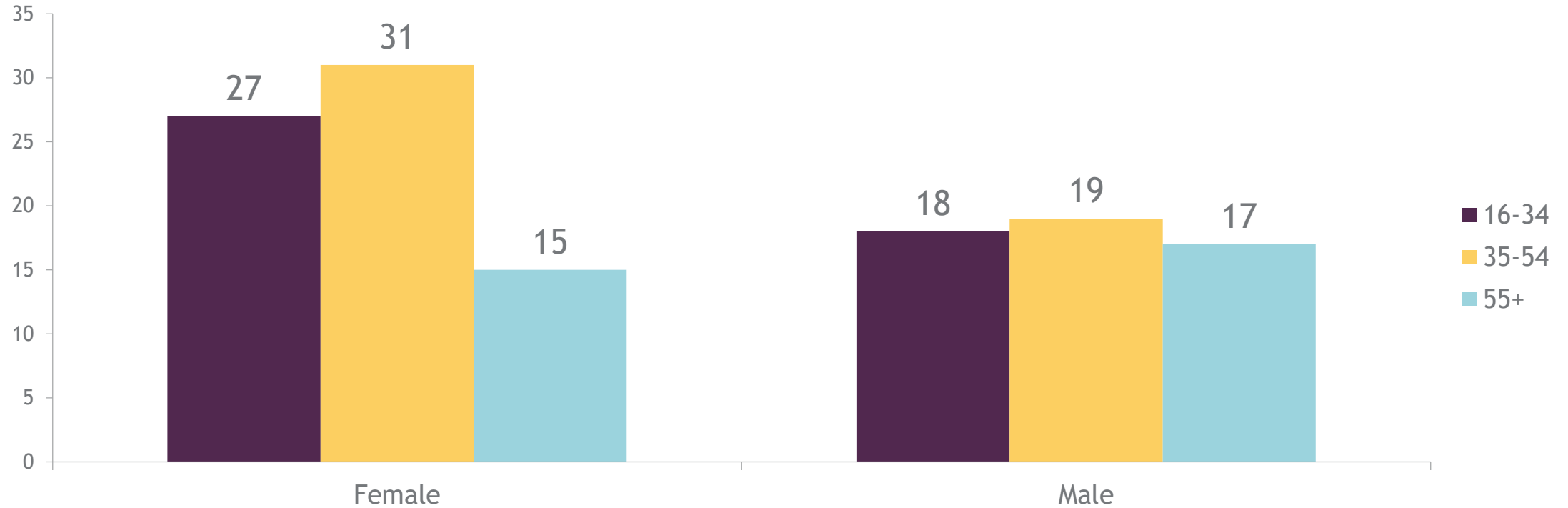
Q6. Do you currently participate in any 'community food' initiatives/activities?



87% of respondents were not participating in any local community food initiatives

12% of all female responders and 14% of all male responders participate in community food initiatives

Q6. 'Do you currently participate in any 'community food' initiatives/activities?' Those answering 'yes' split by gender and age group



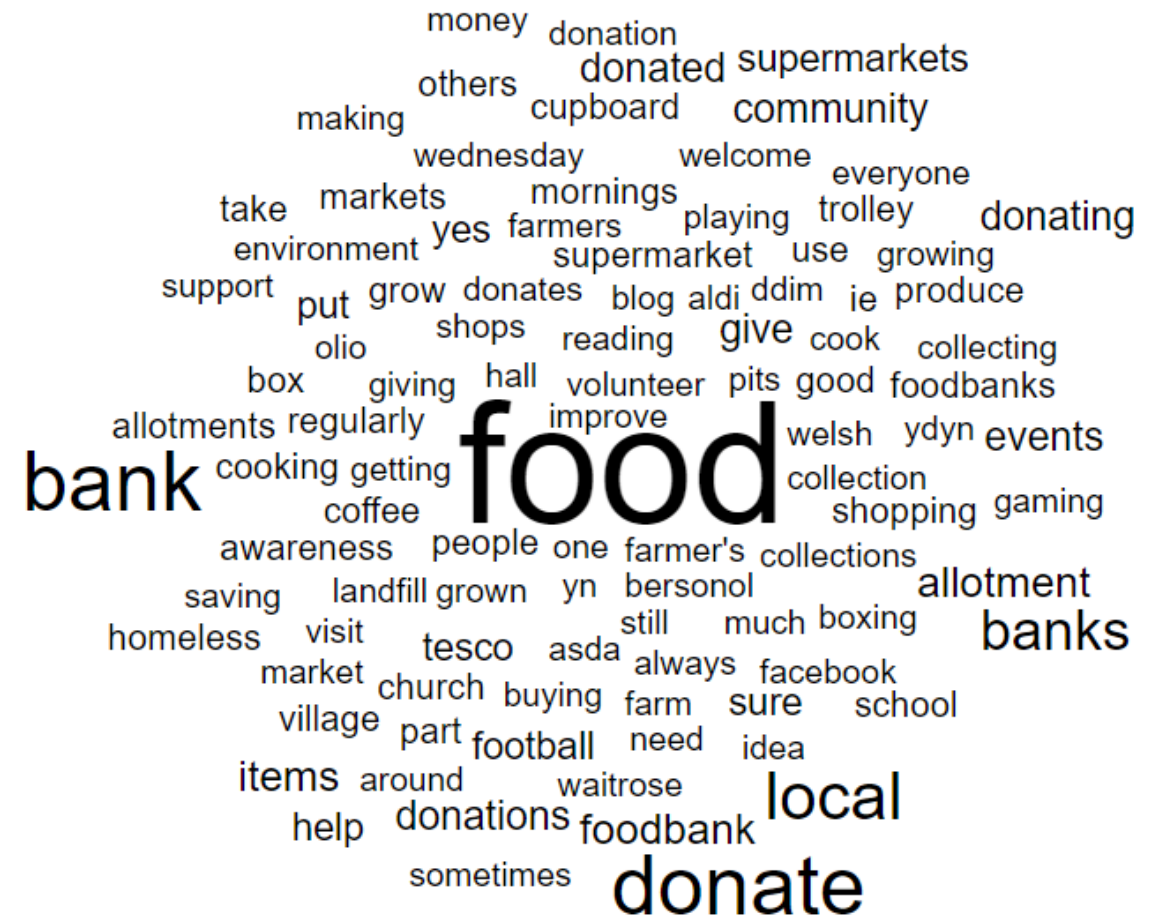
The most participatory female age group was 35-54 followed by 16-34
Female 55+ shown the lowest level of participation in community food projects

Foodbanks had the highest level of participation

Q7. If yes for Q6, what activities do you participate in?

127 participants provided a valid answer to this question:

- 36% mentioned foodbanks
- 9% mentioned supermarket donations (no particular supermarket was mentioned more frequently than others and the ones mentioned included Tesco, ALDI, Waitrose and ASDA)
- 7% mentioned allotments
- Words relevant to 'donations' were mentioned in 33% of the answers, making it the dominant form of community food activity. In the majority of cases donations were given to food banks
- 14% of answers shown a preference for activities around local community food organisations



Q7. For those who are already participating in initiatives the majority are donating, whilst others are more actively involved in schemes or growing their own food. Below provides a snapshot:

I visit local Waitrose and ALDI and take food to the bank. a supervisor for one of the foodbank center in Pembrokeshire. as a clergyman I have been involved with foodbanks. Banciau bwyd. Buying from farmer's market. Church food bank. Community allotment. Community food cupboard- saving from landfill. Cooking for homeless. Distribution. Donate food to food bank. donate food to food banks.grow our own vegetables and share them when ripe with neighbours. Donate in supermarkets. Donate items. donate to food bank. Donate to food bank. Donate to food bank collections. Donate to local food bank. Donate to the local food bank. Donating food to tesco, cooking cakes, making sandwiches for coffee mornings where everyone is welcome. Farmers markets food banks local food shops. Food Bank. Food bank Caernarfon. Food bank donation. Food blog for sustainability. Food donations. food shelter in tesco. Gardening. Give to a playgroup who donates to a local food bank. Giving to food banks. Grow food and donate to Foodbank (Pant), Cook and grow food for Country Markets and other community events. Use food that we have grown to thank people or swap for items. Harvest festival. Have donated food via events at local church. helping with food banks. I donate. I donate food at Tesco for the food bank.. I donate food in supermarkets. I donate food to the food bank. I donate to local foodbanks in supermarket. I donate unwanted food to the homeless. i have an allotment. I help and give as much as I can. I sometimes donate to food banks. Improve the local environment. Local collection of food. Oel droed. raising awareness for cancer, and getting donations. Regularly donate food. School allotment. Shopping for others. Village Cans /food in events le coffee mornings.. Volunteer in Food Bank. We have donated food to them

Lack of knowledge was the key barrier for participating in community food initiatives

Q8. If no for Q6, what is currently preventing you from participating ?



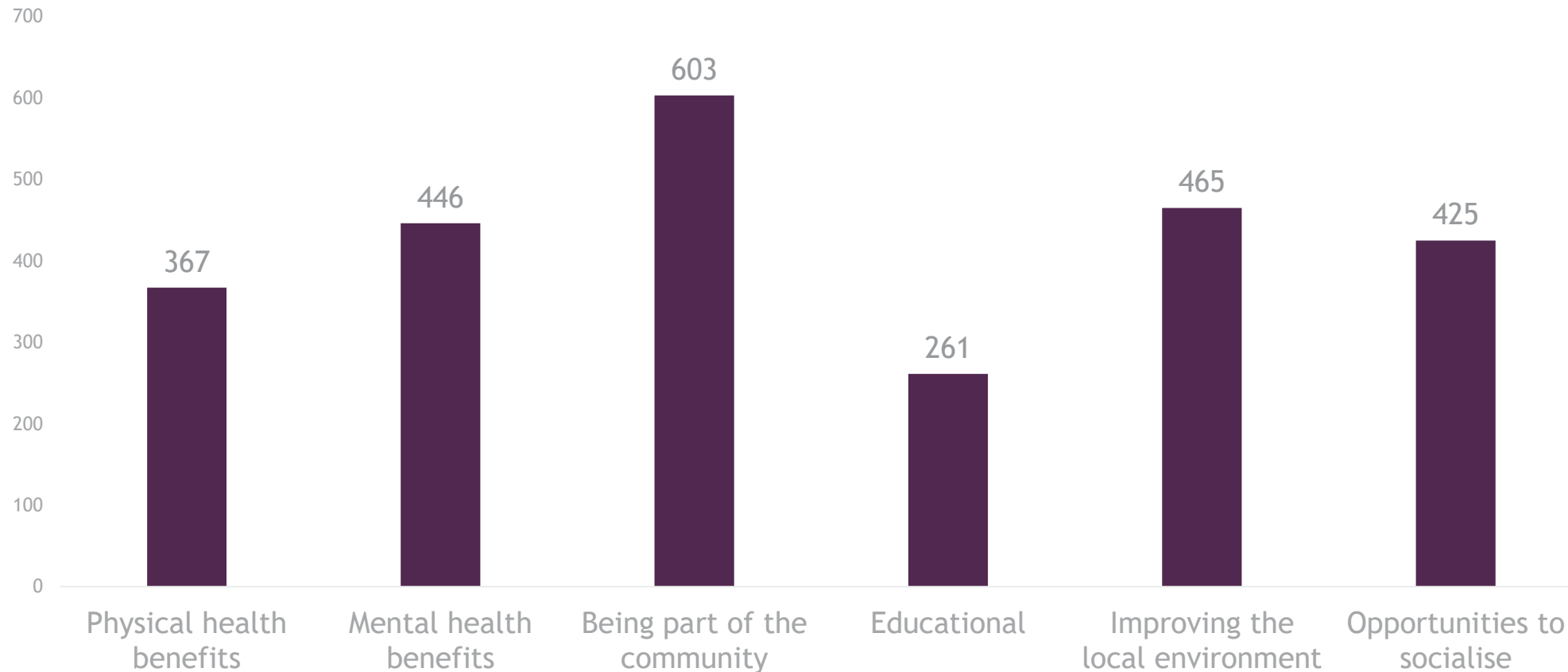
45% of participants did not provide an answer, although we did get **560** answers:

- 43% mentioned lack of knowledge as the key barrier for participating in community food initiatives (majority said that they weren't aware of any initiatives, whilst many also stated that they weren't aware of how to get involved)
- 17% mentioned lack of time as a key barrier inhibiting participation
- 6% mentioned health issues, disability and old age

Being part of the community is key, but the environment and health benefits (mental and physical) play a significant role

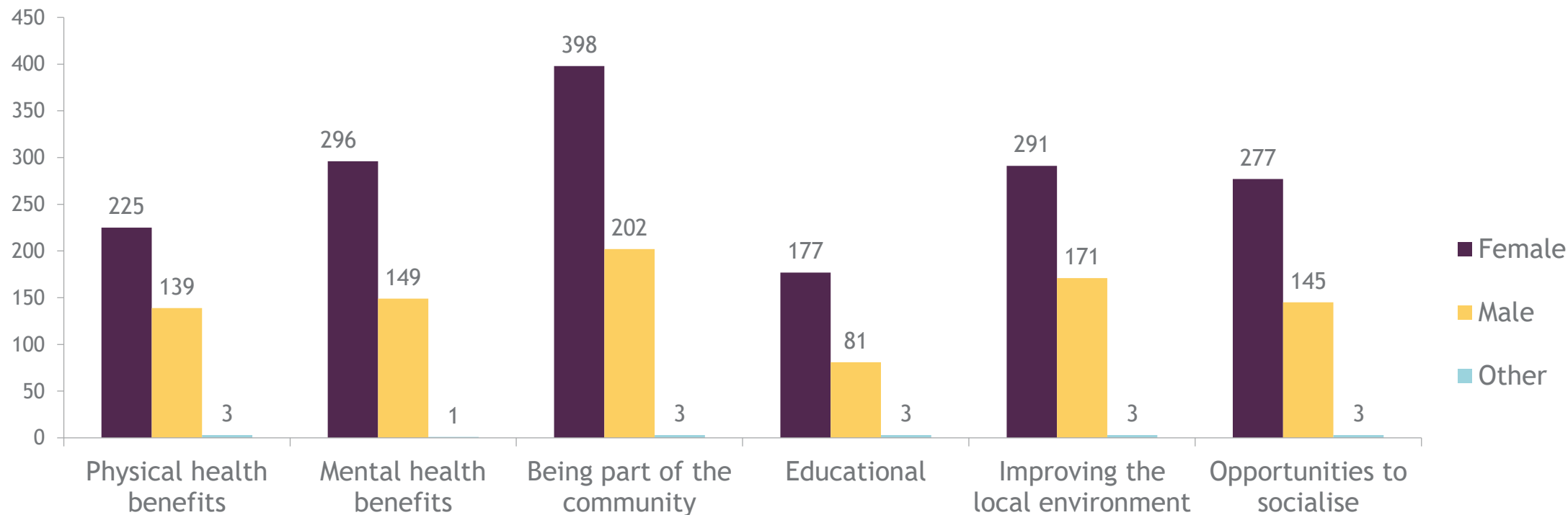
821 respondents

Q9. What are/could be the main benefits for participating in 'community food' activities?



Being part of the community was the key motivator for women and men

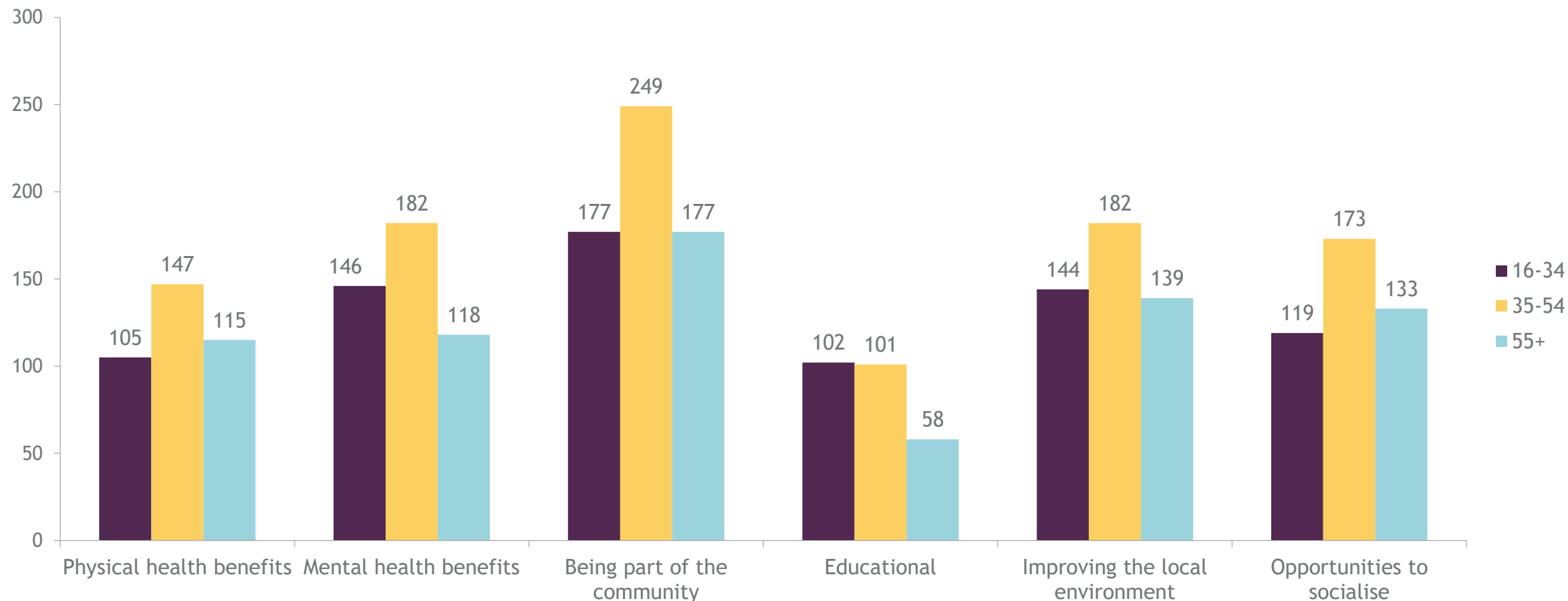
Q9. 'What are/could be the main benefits to you of participating in 'community food' activities?' split by gender



Mental health benefits was more important to women than to men, as 48% of all female respondents ticked that benefit but only 39% of all male responders ticked it
Improving the local environment was another key motivator for both genders

Being part of the community was also the key motivator for all age groups

Q9. 'What are/could be the main benefits for participating in 'community food' activities?' (split by age range)



The age group that showed the highest level of keenness towards being part of the community was the 35-54 group
Improving the local environment was also among the most important for all age groups, however in this case the 35-54 group showed a higher interest towards it
Mental health benefits were among the top motivators for age groups 35-54 and 16-34, but not for age group 55+

Lots of similarities between male/female 16-54, but some changes in the 55+ group when the social aspect increases

Q9. 'What are/could be the main benefits for participating in 'community food' activities?' (split by gender and age range)

		Being part of the community	Mental health benefits	Improving the local environment	Opportunities to socialise	Physical health benefits	Educational
Female	35-54	164	116	114	107	93	65
	16-34	147	119	117	99	79	86
	55+	87	61	60	71	53	26
Male	35-54	85	66	68	66	54	36
	16-34	27	26	24	17	23	13
	55+	90	57	79	62	62	32
Other	16-34	3	1	3	3	3	3

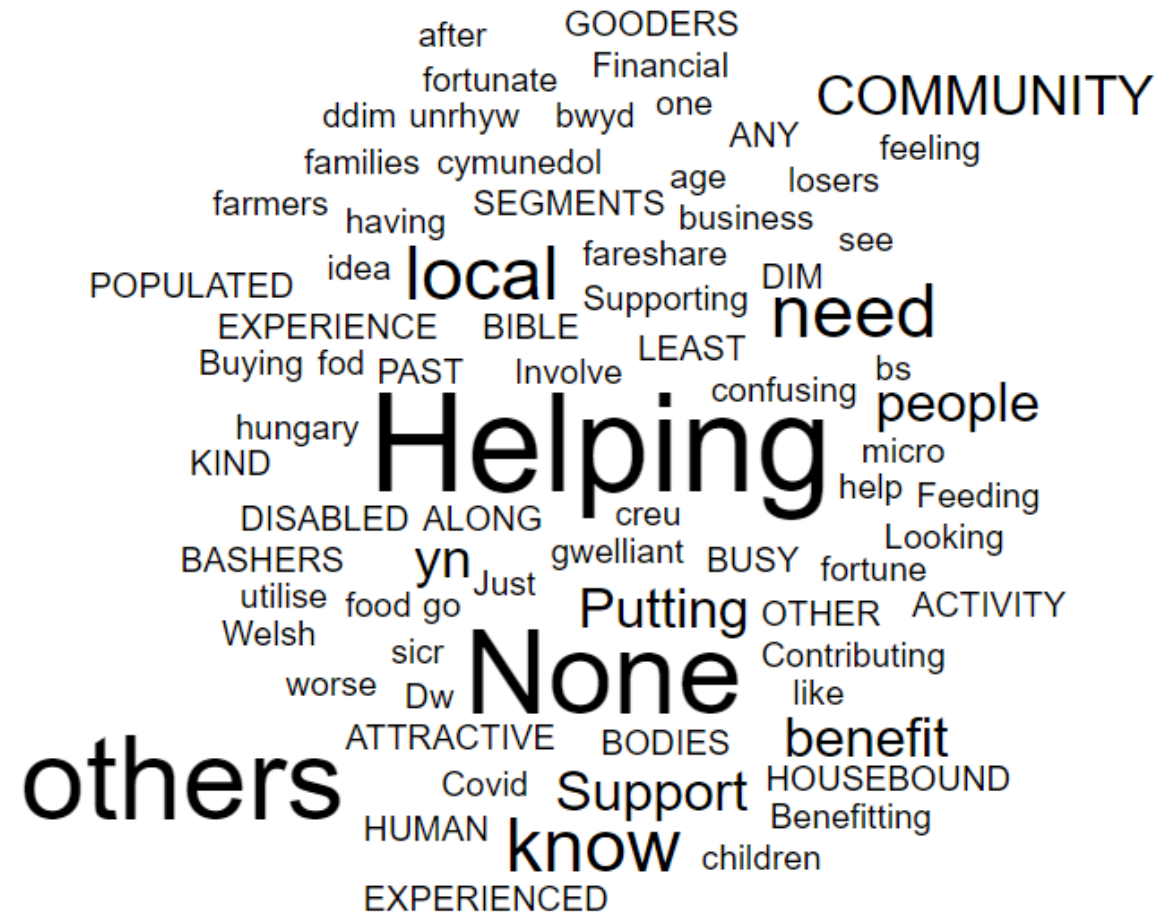
■ Most popular
 ■ 2nd most popular
 ■ 3rd most popular

Community the key motivator for involvement in 'community food' activities

Q9. What are/could be the main benefits for participating in 'community food' activities? (other)

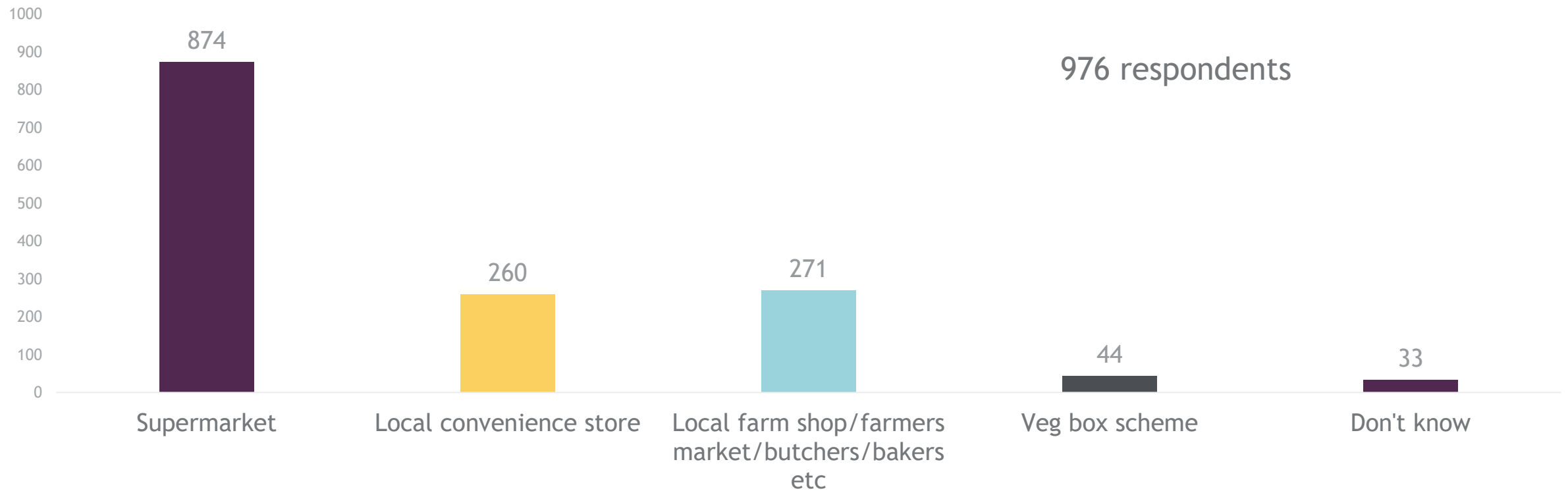
98% stated that they were not aware of any other benefits around participating in community food initiatives

From the **21 answers** provided that did not declare unawareness, the majority stated that they would participate to help others and their wider community, a result further emphasising the importance of ‘local’ and ‘community’ as key motivators



Unsurprisingly supermarkets are the most popular choice, but local stores still has an important role to play

Q10. Where do you currently buy your fresh produce?



Majority of responders said that they grow their own food in the 'other section'

Q10. Where do you currently buy your fresh produce? (other)



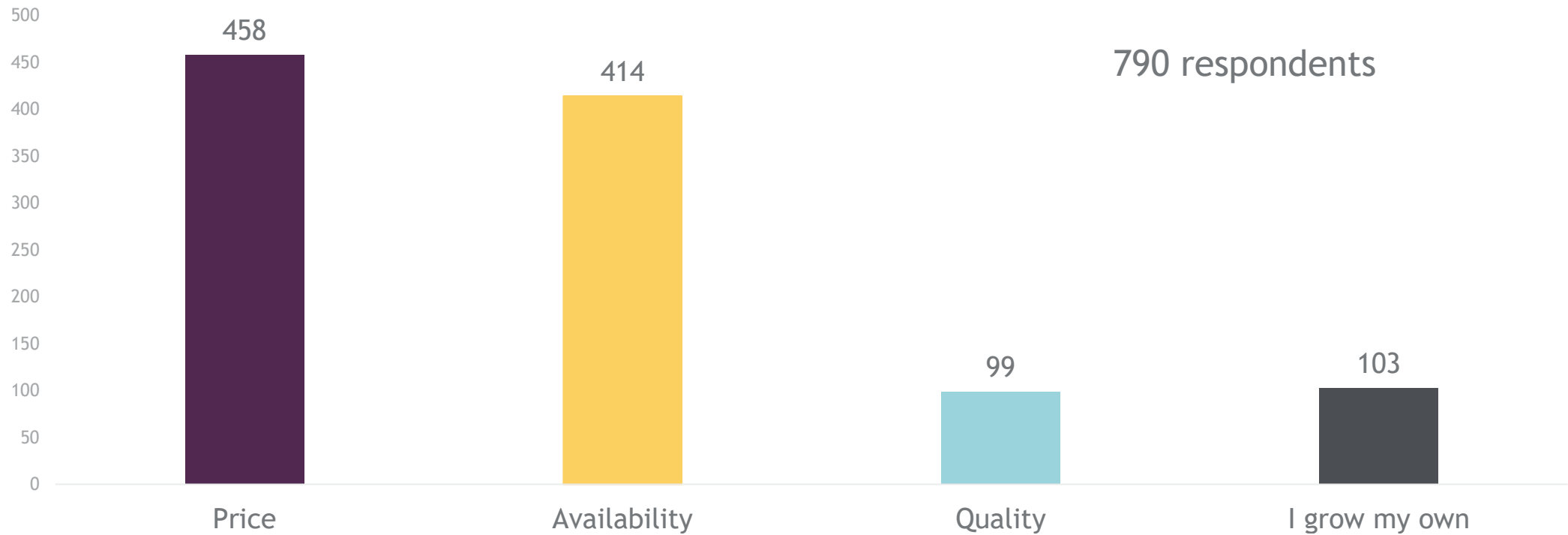
Majority of participants provided an answer around whether they know other providers of fresh produce

97% of responders declared unawareness around alternative providers. From the 27 answers provided that did not declare unawareness:

- 52% responded that they grow their own food
- 26% mentioned that they buy their fresh food from shops

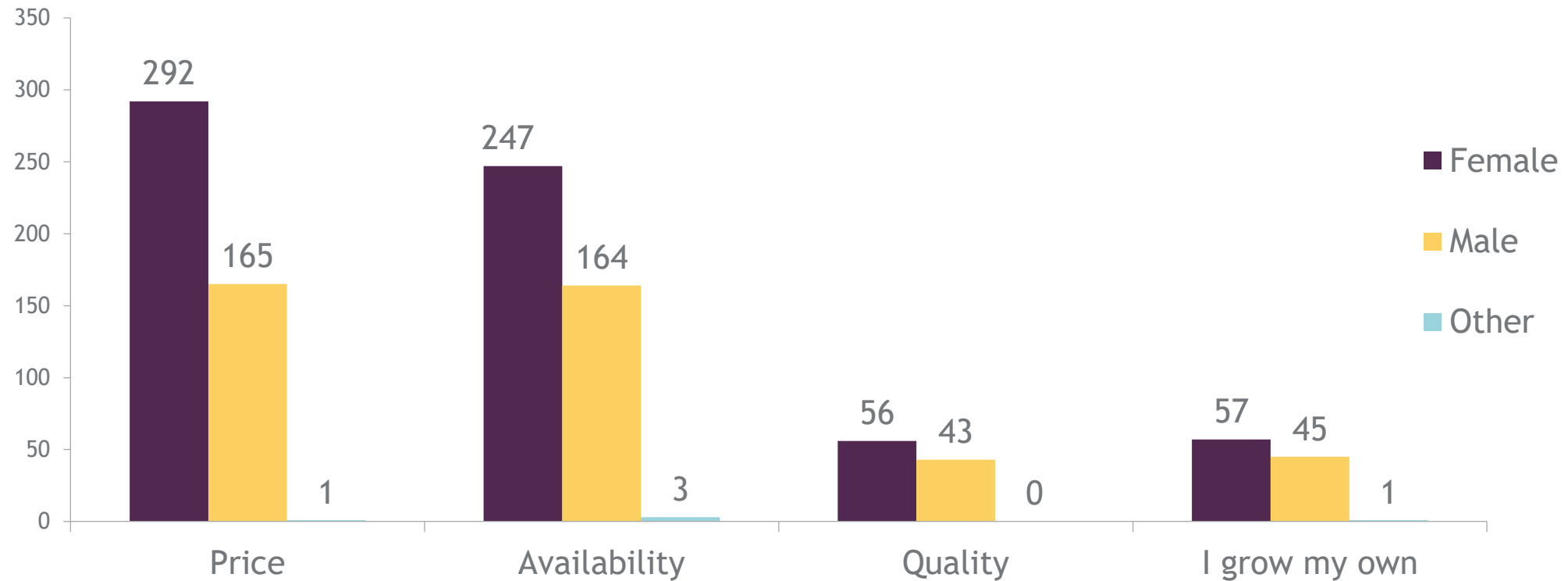
Price and availability are barriers to buying local, plus the lack of awareness

Q11. Is there anything preventing you from buying locally grown produce?



Price was the key barrier for women

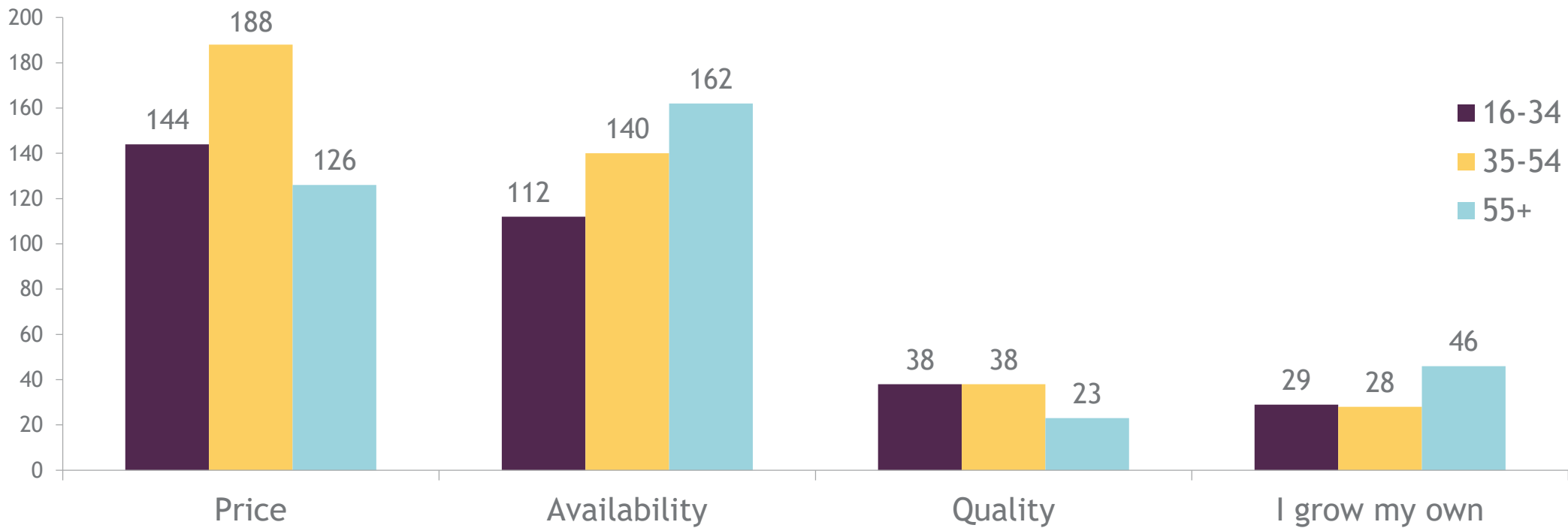
Q11. 'Is there anything preventing you from buying locally grown produce?' split by gender



Price and availability were about the same for Male respondents as a percentage of respondents

Availability was the key barrier for the age group 55+

Q11. 'Is there anything preventing you from buying locally grown produce?' split by age range



Whilst price was the key barrier for the age groups 35-54 and 16-34, 55+ was the age group most likely to grow their own fresh produce

Majority of responders who were aware of alternative barriers mentioned inconvenience as the key barrier

Q11. Is there anything preventing you from buying locally grown produce?
(other)



95% of responders declared unawareness over other barriers

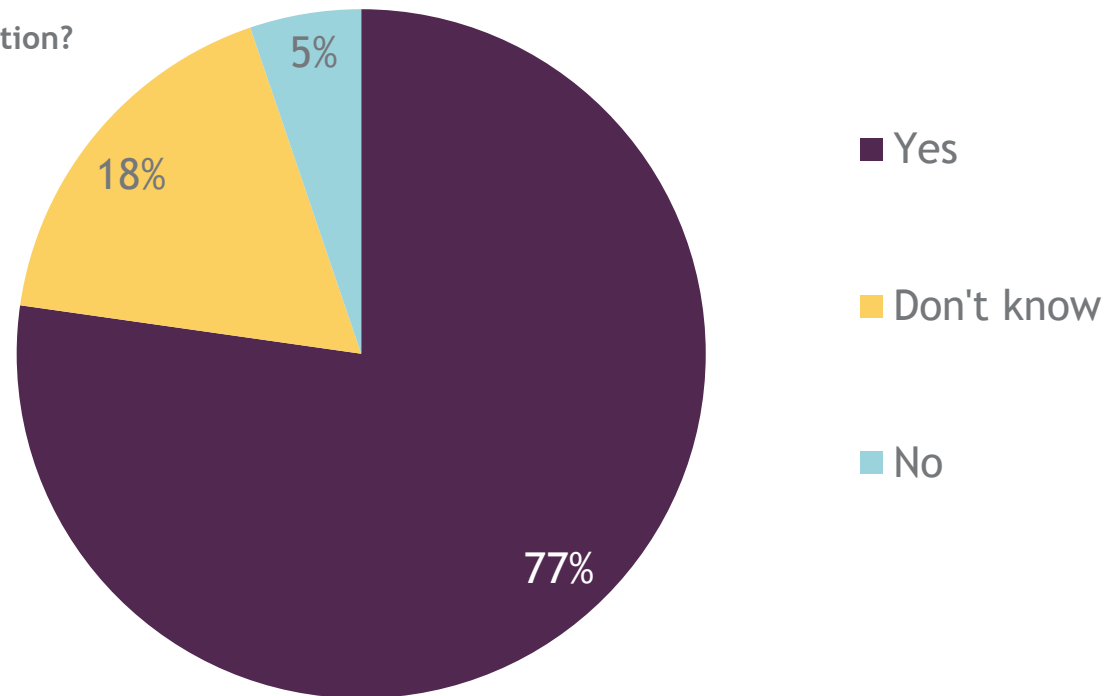
From the **48 answers** provided that did not declare lack of awareness:

- 53% mentioned inconvenience as a key restriction in buying locally grown produce (buying from a supermarket was more practical, they use some form of delivery service, lack of accessibility and lack of time)
- 18% mentioned that they buy locally grown produce

Majority of participants answered that more locally produced food should be produced in the community

Q12. Do you think more locally produced food should be produced in the community for community consumption?

837 respondents



18% answered that they 'don't know', whilst only 5% answered 'no'

Majority of participants answered that more locally produced food should be produced

Q12. Do you think more locally produced food should be produced in the community for community consumption?

77% responded yes, 50% commented with the following key words

- | | |
|-------------------------------|-----|
| • Individual comments | 42% |
| • Good for environment/health | 18% |
| • Good for the community | 17% |
| • Carbon footprint | 14% |
| • Other benefits | 9% |

Types of comments

- Good for the local environment and helps people to understand where their food comes from
- More local produce is better for travel miles etc.
- Good for local economy
- Most communities should have an allotment for growing and eating their own food as it would help with loneliness and mental health
- Would help create a bond in the community across all ages

Awareness raising was among the key recommendations for developing community food initiatives

Q13. What would be your suggestions to develop more 'community food' initiatives/activities in Wales?



49% of participants provided an answer

From the 450 responses:

- 36% mentioned that raising more awareness is needed to develop more 'community food' initiatives
- 16% mentioned the need for more space to be made available for allotments
- 5% mentioned the need for funds for community food initiatives
- 3% mentioned the need for lower prices on community food products
- 3% emphasized the demand for more community gardens

Q12. Supporting the local community, helping those in need and building social cohesion were key factors, closely followed by the environmental impact of buying and growing locally. There was a keen interest in teaching and encouraging more people to grow their own. A snapshot of comments included:

At present I am not aware the food bank will take fresh food. Because I gives money to local people. Because it will help global warming and keep farms alive. Because when food can't be delivered to shops we have back ups. Far more benefits. Food security. food shortages should not be happening. supplies are wasted if not transported or bad weather ruins crops. Fresh veg only on a market but it gets too packed with people. Good for own local economy. good idea. Help bring more money to the local community and improve communities by offering opportunities to socialise. Help with stress and anxiety etc. Helping the community, the environment, helping our local farmers, very fresh produce, tastes better, much healthier, less hand touches on the produce. i grow my own ,i local honey producers. I think if people grow their own and participate in a community project then they will get more out of their food . I wish that the likes of Tesco and other major brands would make more room for locally produced food and goods. i would love to buy directly from local farms. if grown locally why not use it locally. If more low income and I waged families were taught to grow food on a community allotment there would be less demand for food banks. I'm unaware of local produce sales. It is good for the environment not having food shipped in and it ensures fresh food for the community. It is not allowed to sell produce from allotments (I agree' some would profiteer) yet that could change to allow them, as a GROUP, to raise money for seed by selling some produce. When I had my allotment I donated stuff to the local food bank and others I knew needed fresh stuff. The allotments are poorly run and many places unfilled though there are waiting lists; the allotments are not a community and have little involvement with the local area. This could and should change. it will improve local community unity and togetherness. it would be good for the local economy. It would bri g communities together & cost effective. It would give money to local producers to be able to create more jobs and provide more food. It would help the local community. It would save on carbon emissions because it's less travel time.It's helping your community. Lleinhaul air miles a gwella ansawdd y bwyd. More allotments. More healthy. More people would be involved. More sustainable, environmentally friendly, lower carbon footprint. Possibly a lack of ground for people to grow. Promotes a sense of community. Reduce food miles. Reduces "food miles". Reducing carbon footprint. Reducing food miles is a good thing and the more food is produced locally, the easier it is to do. Sustainable, strengthens community. Tastier, less miles travelled and support local businesses. Fresher. The food is more sustainable and more environmentally friendly. This makes our life more convenient. To get more people involved. To help the community. To reduce carbon footprint. To support your local community. We need more space to make more allotment areas has we have not got much space. We should all oit in an grow our own. We're far too reliant on supermarkets (me included). It's too convenient (or maybe I'm too lazy). Yes . We have become dependant on imported produce . Getting back to the soil is the best way to maintain health . Anything grown by a person is more beneficial to them . Scientifically proven fact . Yes but more cheaper. Yes growing locally will encourage local wildlife. Availability of food locally will reduce carbon footprint. It will foster community spirit/support and help people who need it most. Yes indeed this would help our community money wise and helps people eat more healthy. yes it would be far easier for people to get value. Yes, it's a great idea get people to come together and look after our environment and ourselves

Raising more awareness was amongst the key recommendations for developing community food initiatives

Q13. What would be your suggestions to develop more 'community food' initiatives/activities in Wales?

Types of comments:

- Run a series of ads on TV and online talking about community food projects in general and emphasising the benefits in order to increase awareness
- Provide a helpline/website that gives more information about active projects in different areas. Also, provide an area that gives information about how to set up different types of community food initiatives and what support/funding might be available
- Facilitate a hub where people running/involved in community food projects can come together to share good ideas and best practices
- Supplying more land for community food initiatives and not building so many houses on perfectly good farm land
- More advertising about the people that run them, and how they can benefit us
- More education on benefits
- Getting schools involved
- Investment is needed to start any such project

Summary and recommendations

Summary of findings

Foodbanks/community fridges and donations were the most recognisable forms of community food initiatives, whilst local food in local stores was the least recognisable

Majority of respondents were not aware of local community food initiatives

As a result, the majority of respondents did not participate in any community food initiatives

Lack of awareness around initiatives was recognised as the key barrier for participation, followed by a lack of time

Being part of a community and helping its members was the key potential motivator for participating in community food activities, followed by improving the local environment and mental health benefits

Majority of respondents said that they mostly buy fresh produce from supermarkets

Key barriers to buying locally grown fresh produce were price and availability, whilst some respondents also mentioned that buying it from the supermarket was more convenient in terms of accessibility and time management



Summary of findings

77% of respondents agreed that more community food should be produced for community consumption

Majority of respondents also mentioned raising more awareness as the key tactic needed to develop more community food initiatives in Wales, whilst some also mentioned the need for more allotment space

Women were overall more aware and more participatory around 'community food' initiatives - especially female groups 35-54 and 16-34

Key motivations for participating in community food initiatives among these groups were 'being part of the community', 'mental health benefits' as well as 'improving the local environment' - with some level of socialisation desired from the 55+ group

Price and availability were the key barriers for buying locally grown produce for all demographic groups which took part in the survey



Key findings and recommendations

1. Low level of awareness around community food initiatives

Run campaigns focusing on awareness raising around community food initiatives and about 'growing your own' - make it easy to participate

2. Top motivation for participating was 'being part of the community'

Mainly focus your message on community participation and growth but also on mental health benefits and environmental impact

3. Pricing and availability among the key barriers for buying locally grown produce

Highlight the benefits of paying a slightly higher price for local impact. Communicate on a local level and signpost where local produce can be found and the easiest ways to get it.

4. Women more aware around community food initiatives

Make it a priority to maintain the interest of female audiences by constantly keeping their awareness raised around community food initiatives. Focus targeting on the age range 35-54 as well as 16-34

5. Men more unaware than women around community food initiatives

Focus on raising the awareness and interest of male audiences - already some schemes running around pubs, sports clubs, etc.

Thank you