[UNION DATA]

Food in Scotland Consumer Tracking Survey Wave 17

Presentation of Results

January 2024

Food Standards Scotland

Executive Summary

Awareness of Food Standards Scotland (FSS) and trust in FSS have increased over the previous six months. In Wave 17, 81% had heard of FSS compared to 78% six months earlier. Trust in FSS grew more substantially from 71% to 81% in the six-month period.

Recognition of FSS and interaction with the FSS website is particularly high amongst those that have someone in the household that is pregnant.

Key themes from Wave 17 are a result of the relatively high cost of living. 93% of respondents were concerned about food prices. This figure was even higher for groups that are more susceptible to changes in food prices such as those living in rural areas.

The cost of living has changed consumption behaviours. Over half of the survey respondents reported swapping to cheaper brands in the past six months. Similarly, around half had eaten out and ordered takeaways less.

Higher food and energy bills have also impacted cooking habits. Over three-quarters of respondents said that they had used cheaper cooking methods. However, of more concern was that 29% had reduced the length of time food is cooked for and 23% had reduced cooking temperatures. This change in behaviour may increase the risk of food not being cooked properly and could, potentially, lead to increased food poisoning.

Food poverty is also impacting basic nutrition. Overall, 29% could not afford to eat a healthy balanced diet, 28% were either making meals smaller or skipping meals and over one-fifth (22%) could not afford essential shopping. These results were even more acute for those living in the most deprived areas. 39% in the most deprived SIMD Quintile could not afford a balanced diet while 41% had cut or skipped meals.

Background

- The Food in Scotland Consumer Tracking Survey monitors attitudes, knowledge and reported behaviours relating to food using a representative sample of Scotland's population.
- The tracker is used to identify changes in behaviours and attitudes over time.
- Established by Food Standards Scotland (FSS) in 2015, the survey is undertaken bi-annually in July and December.
- In 2023, the survey has been adjusted to make it more comparable to the Food Standards Authority's (FSA) tracker that covers England, Wales and Northern Ireland.
- The survey was set up by Kantar TNS who conducted Waves 1-6 and JRS Research from Waves 7-16. Union Data has carried out the research in the latest wave of reporting.
- Significant* increases or decreases between Waves 16 and 17 are indicated by ⇧⇩

* Based on Z-tests for independent proportions.

Methodology

- The research methodology is consistent across research waves to ensure comparability

Online self-completion survey

Representative sample of **1,039** Scottish adults

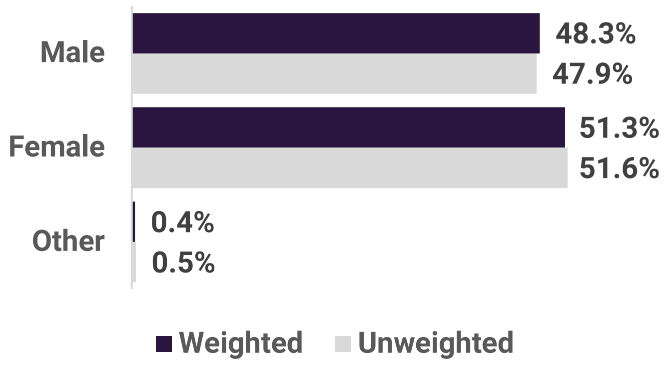
7-minute questionnaire length

1st – 10th December 2023

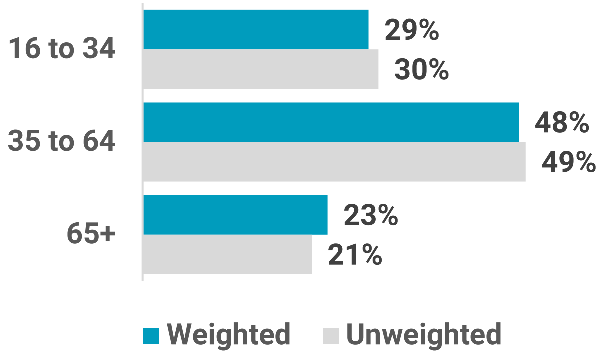
- Research was undertaken in strict accordance with MRS Code of Conduct and GDPR legislation

Sample is representative of the Scottish population – data was weighted on key demographics to match the Scottish population.

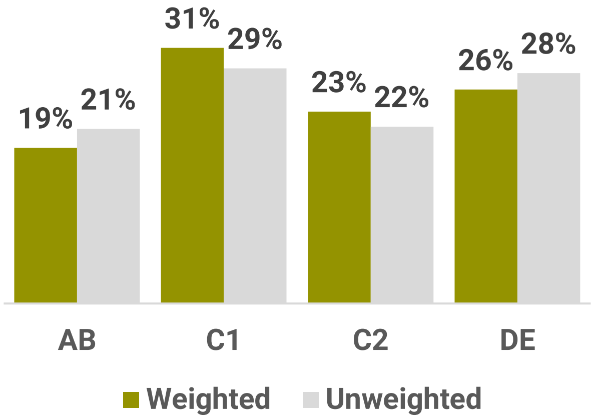
Gender



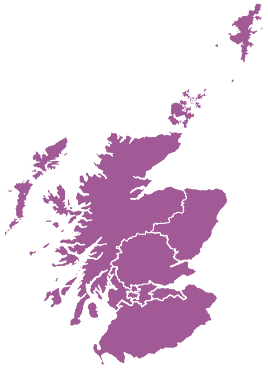
Age

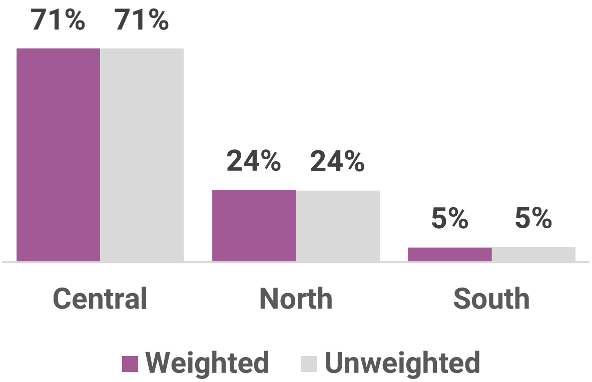


Social Grade



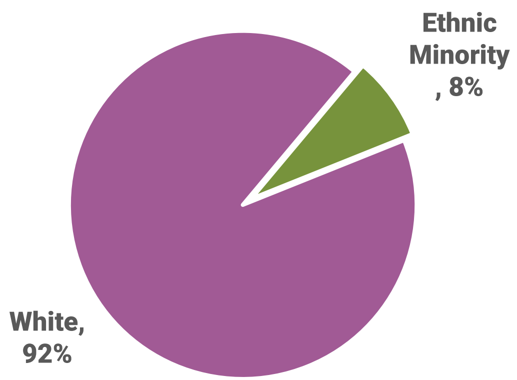
Location



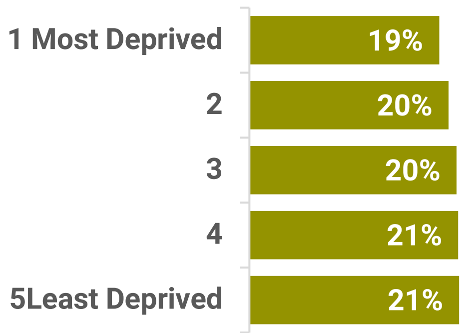


Sample Profile – Weighted

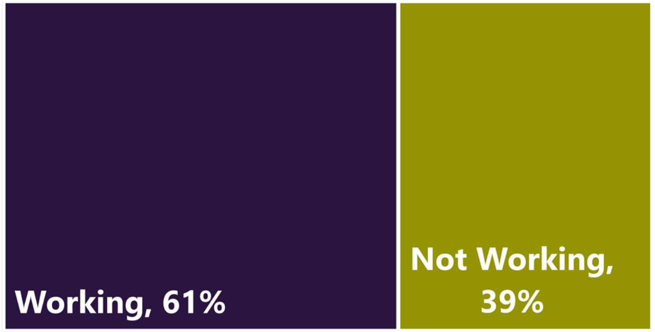
Ethnic Group



SIMD Quintile*



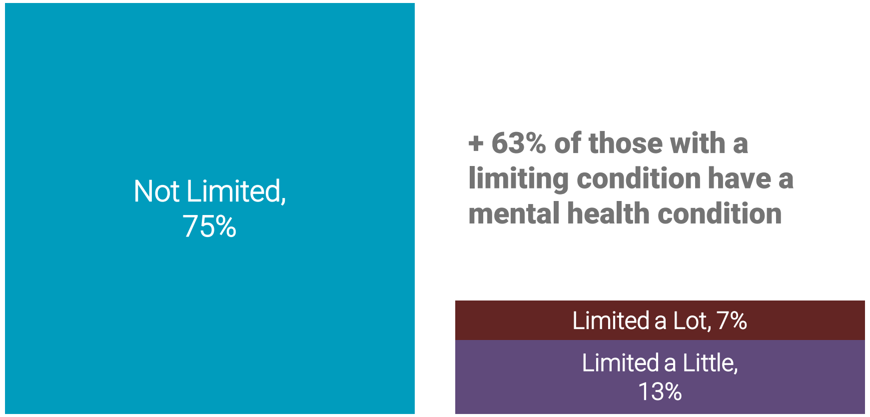
Working status



Household composition

Includes 30% of households with children

Limiting Health Issues



+ 63% of those with a limiting condition have a mental health condition

*Included as a weighting factor.

Awareness, Trust and Visibility

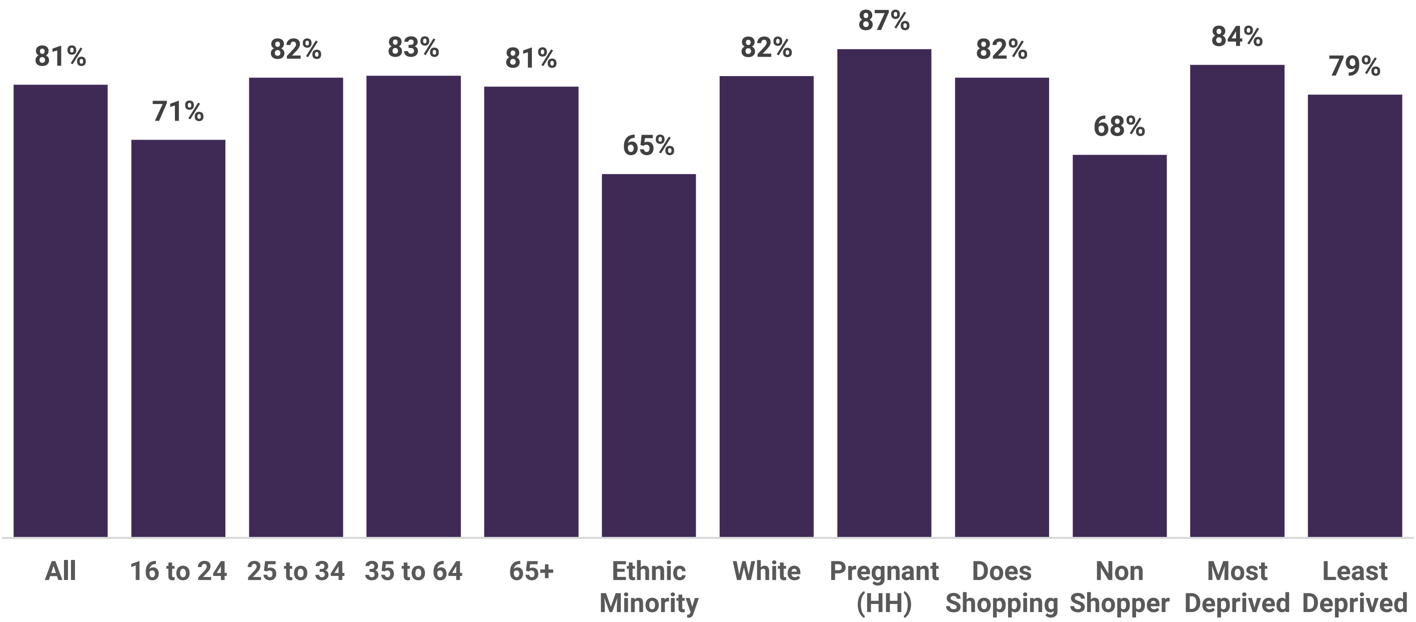
Over 80% of adults across Scotland are aware of Food Standards Scotland.

81% have heard of FSS

78% Wave 16

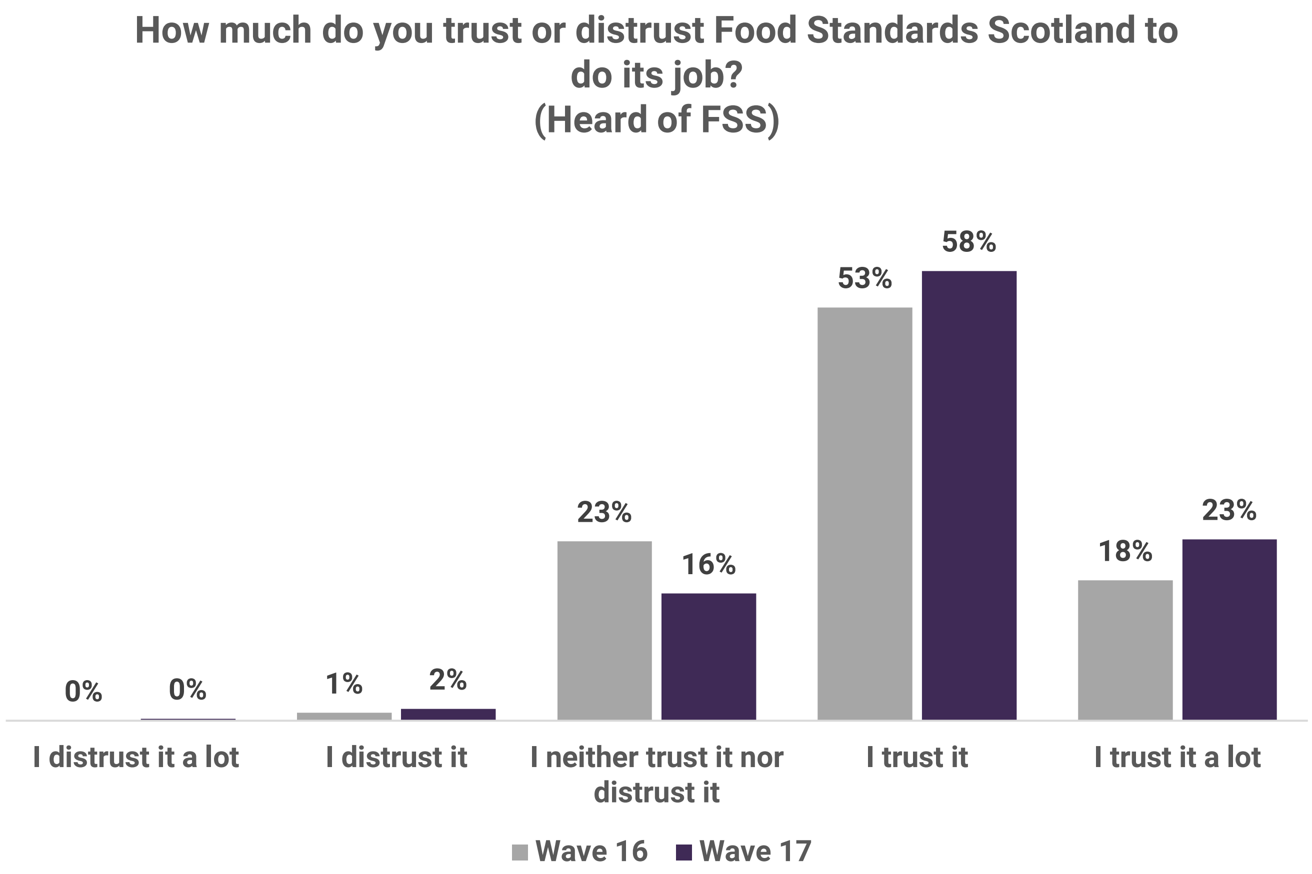
- Awareness levels are generally consistent with some exceptions.
- There is noticeably less awareness of FSS in the youngest age band 16-24 (71%), Ethnic Minority respondents (65%) and those that are not responsible for shopping (68%).
- In contrast, awareness is very high amongst those with someone pregnant in the household (87%).

Have you heard of Food Standards Scotland?



Q1 Have you heard of Food Standards Scotland? Base: All respondents *n*=1,039

High levels of trust are placed in the organisation to do its job, over 80% that have heard of Food Standard Scotland trust the organisation; marginally higher than previous waves.



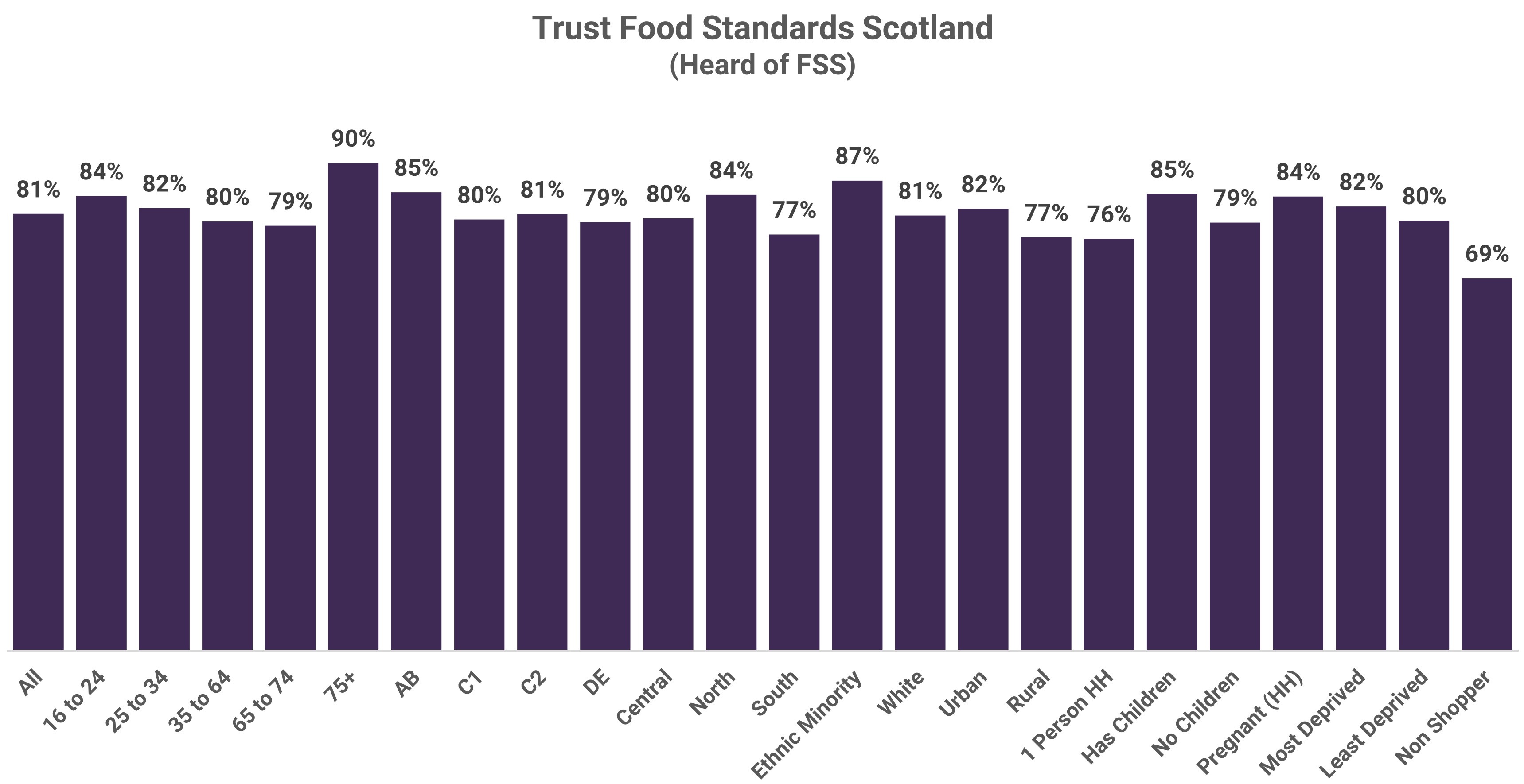
- Very few that have heard of FSS distrust the organisation: Only 2% in Wave 17 compared to 1% in Wave 16.
- Trust in FSS (trust and trust a lot) has increased while ambiguity (neither trust nor distrust) has diminished in Wave 17.
- Total Trust in FSS has risen from 71% in Wave 16 to 81% in Wave 17.

Food Standards Scotland

Q2 How much do you trust or distrust Food Standards Scotland to do its job? Base: Those aware of FSS *n*=837 (weighted 840)

[UNION DATA]

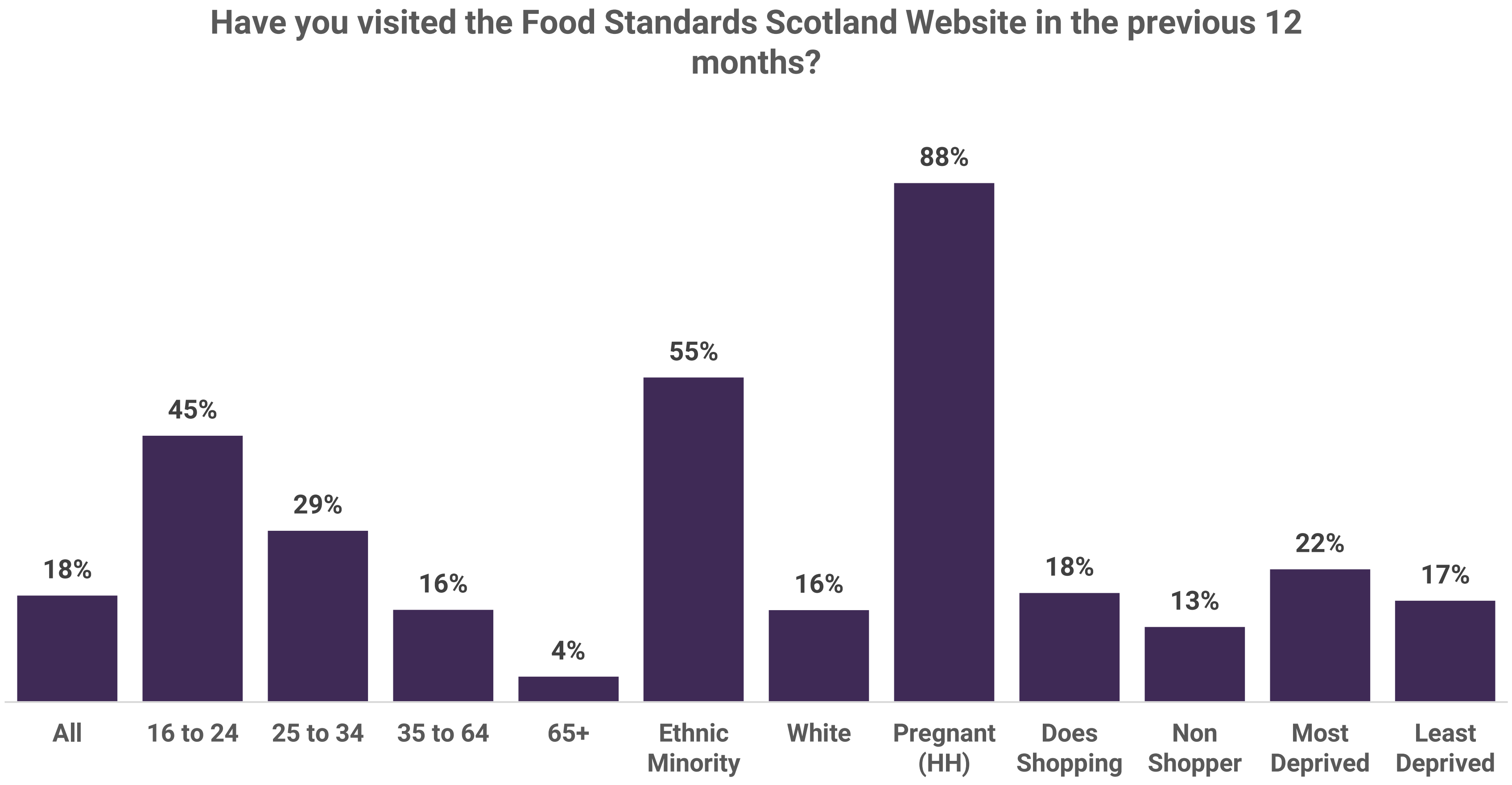
High levels of trust are placed in the organisation to do its job, by those aware of FSS. Trust is highest amongst the oldest and ethnic minority respondents.



- Trust was highest in the oldest respondents aged 75+ (90%), Social Grade AB (85%), Ethnic Minority respondents (87%), those with children (85%), with a pregnancy in household (84%) and from region North (84%).
- Lowest levels of trust were found for those that are not responsible for shopping (69%), single person households (76%), region South (77%) and Rural respondents (77%).
- Despite Ethnic Minority respondents being the least likely to have heard of FSS, those that have heard of FSS have a high level of trust in the organisation.

Q2 How much do you trust or distrust Food Standards Scotland to do its job? Base: Those aware of FSS *n*=837 (weighted 840)

18% of all respondents that had heard of FSS had also visited the FSS website, but this rose to 88% for respondents with someone pregnant in the household. Younger people were the most likely to have visited the website, older people the least.



- 18% of all respondents that had heard of FSS had visited the FSS website.
- The most likely to visit groups were respondents with someone pregnant in the household (88%), Ethnic Minority respondents (55%) and respondents aged 16 to 24 (45%).
- Use of the website was inversely correlated with age
- For those aged 65 or older, only 4% had visited the website.

Food Standards Scotland

Q3 Have you visited the Food Standards Scotland Website in the previous 12 months? Base: Those aware of FSS *n*=837 (weighted 840)

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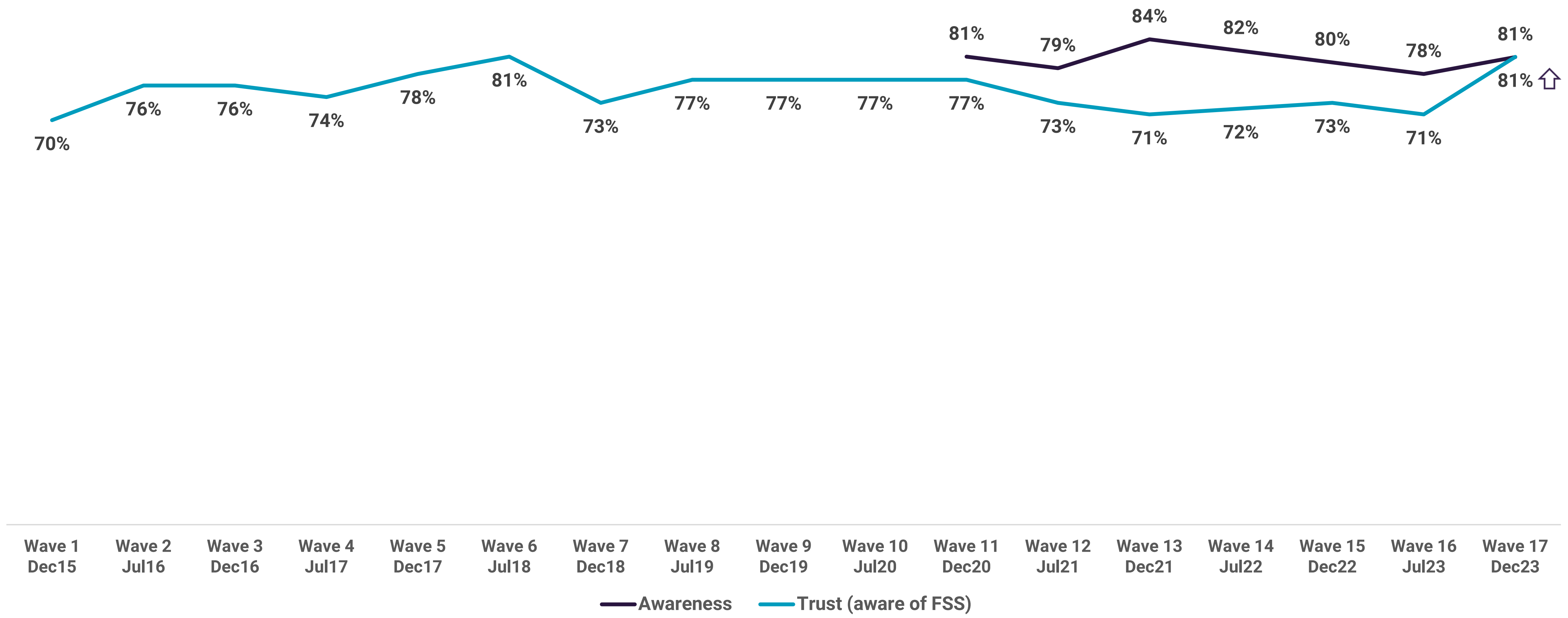
Trust has risen to 81%, a level not seen since Wave 6. Awareness has risen to 81%, higher than Wave 16 (78%).



Q1 Have you heard of Food Standards Scotland? Base: All respondents *n*=1,039,

Q2 How much do you trust or distrust Food Standards Scotland to do its job? Base: Those aware of FSS *n*=837 (weighted 840)

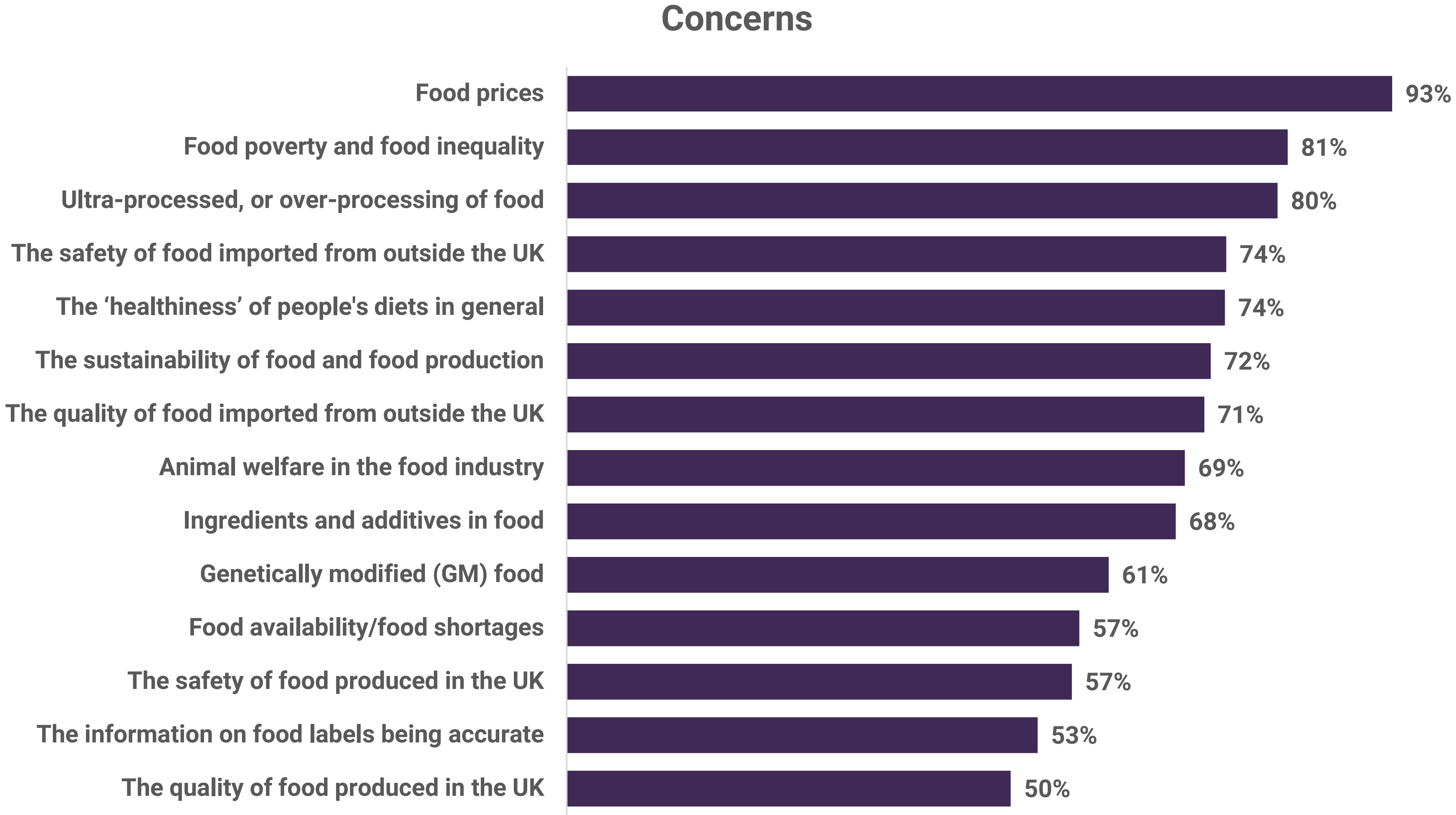
Awareness, Trust and Visibility – Summary

- 81% have heard of FSS in Wave 17 up from 78% in Wave 16
- Awareness was lowest amongst the youngest aged 16-24 (71%), ethnic minority respondents (65%) and non-shoppers (68%)
- Awareness was highest where there was a pregnancy in the household (87%) and this group was by far the most likely to have visited the website.
- More than 80% of those who are aware of FSS trust the organisation (up from 71% in Wave 16)
- Trust was highest in the oldest respondents aged 75+ (90%), Ethnic Minority respondents (87%), Social Grade AB (85%), those with children (85%), with a pregnancy in household (84%) and from region North (85%)
- Lowest levels of trust were found for those that are not responsible for shopping (69%)
- Despite Ethnic Minority respondents being the least likely to have heard of FSS, those that have heard of FSS have a high level of trust in the organisation

Awareness of FSS is very high and, reassuringly, trust of FSS is also very high. However, there may be some work to be done in improving awareness in Ethnic Minorities, young adults and non-shoppers.

Issues of Concern for Consumers

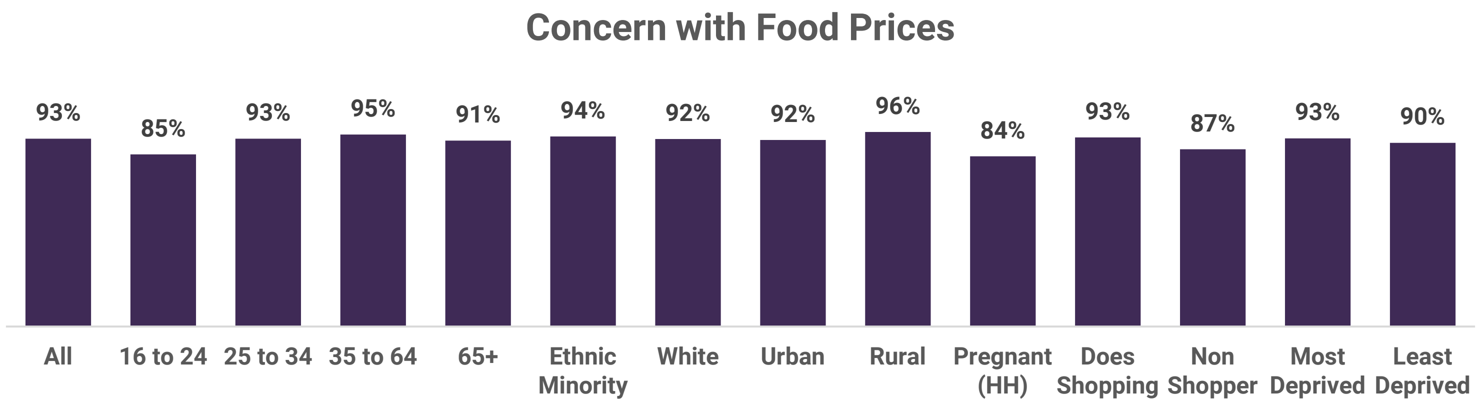
Food prices are a concern for 93% of consumers while Food poverty and inequality are a concern for 81% of consumers.

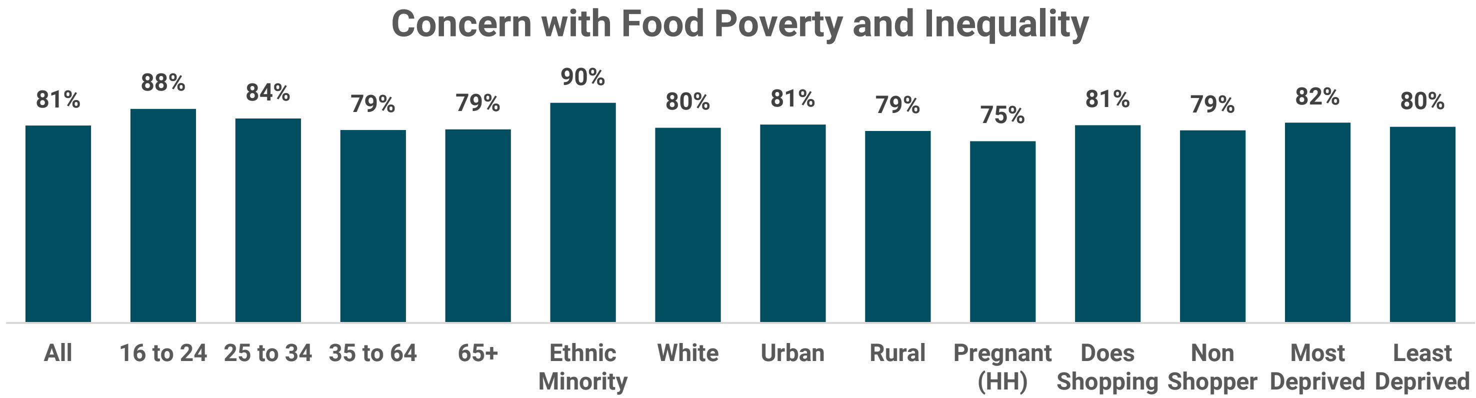


- Food prices and food poverty are major concerns
- Food prices are a concern for 93% of Scots while food poverty and inequality is a concern for 81%
- Food health and safety topics are the second highest concerns
- 80% are concerned about processed foods, 74% about the safety of imported food and 74% about the healthiness of diets
- The safety and quality of UK food are amongst the three lowest areas of concern

Q9a and Q9b Thinking about food in the UK in general At the moment, how concerned, if at all, do you feel about each of the following topics? Base *n*=1,039

Food prices are a concern across all demographic groups but highest for those in rural areas. Concerns with food poverty are highest among Ethnic Minority respondents and the youngest age group (16-24)

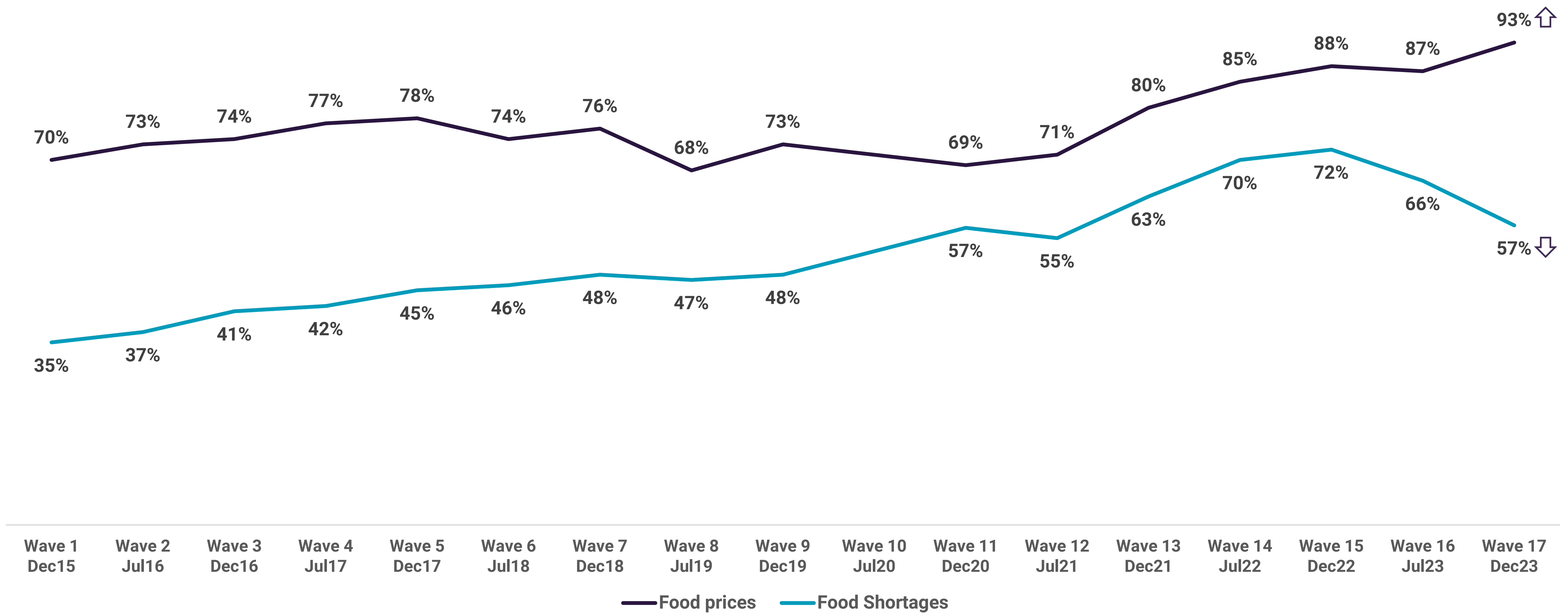




- Concern with food prices are quite similar across different demographics
- Concern about food prices is highest for those in rural areas
- Food prices are of least concern to the youngest and households with someone pregnant
- Food poverty and inequality shows more differences
- Ethnic Minority respondents and the youngest age group (16-24) have the highest level of concern with food inequality
- Households with someone pregnant have the least concern about food inequality

Q9a and Q9b Thinking about food in the UK in general At the moment, how concerned, if at all, do you feel about each of the following topics? Base *n*=1,039

Levels of concern about food prices have risen to 93% up from 87% in Wave 16. Concern about food shortages has fallen in recent waves – dropping down to 57% in Wave17 from 66% in Wave 16.



Q9a and Q9b Thinking about food in the UK in general At the moment, how concerned, if at all, do you feel about each of the following topics? Base *n*=1,039
Questions regarding Food Prices and Food Shortages in previous waves had a sample of *n*>1,000 excluding waves 14-16 where the sample sizes varied between 790 and 860 and Wave 10 where these questions were omitted.

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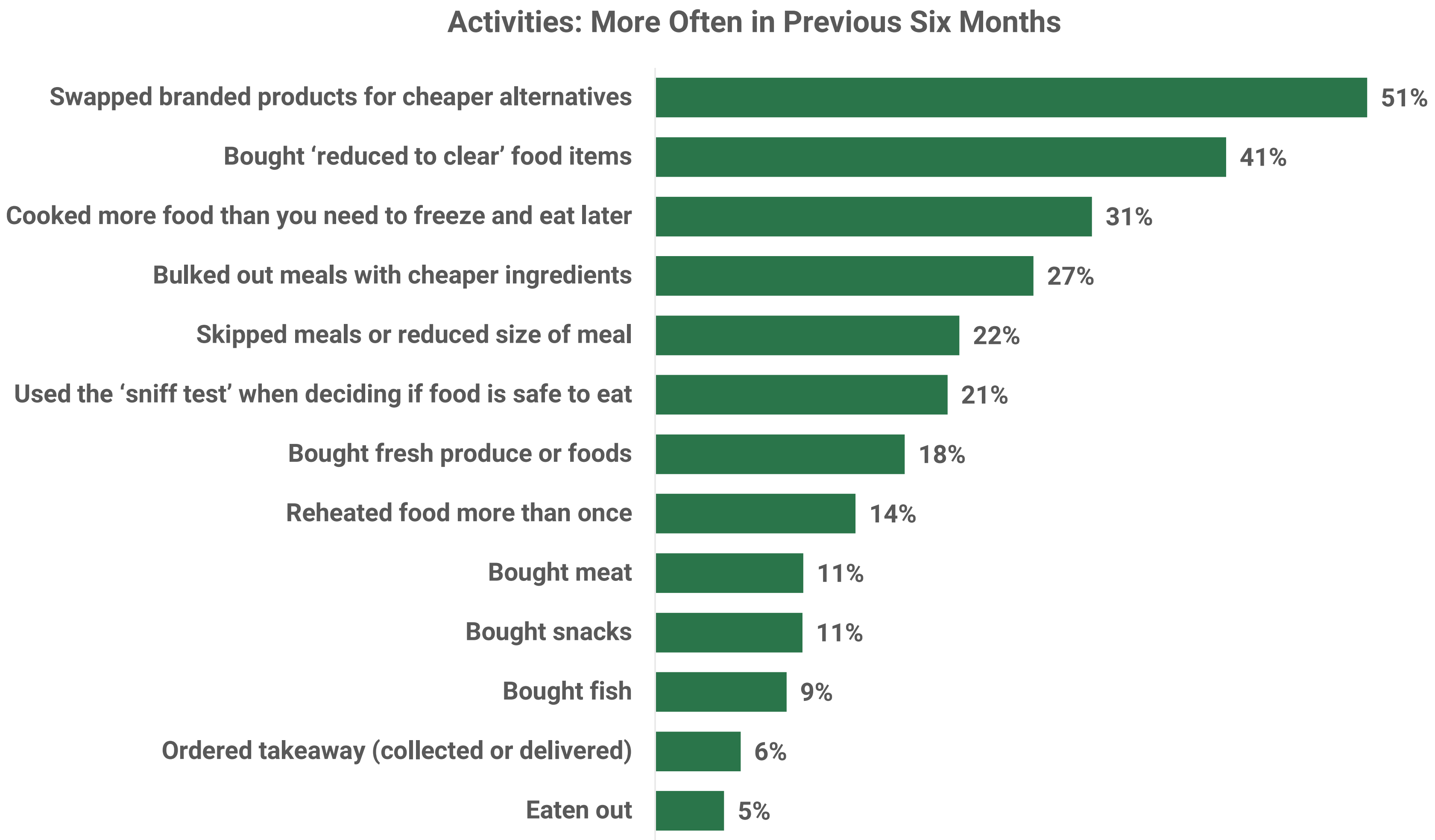
Issues of Concern for Consumers – Summary

- Food prices are a concern for 93% of consumers while Food poverty and inequality are a concern for 81% of consumers.
- Food health and safety topics are the second highest concerns - 80% are concerned about processed foods, 74% about the safety of imported food and 74% about the healthiness of diets.
- The safety and quality of UK food are amongst the three lowest areas of concern.
- Levels of concern about food prices have risen to 93% up from 87% in Wave 16.
- Concern about food shortages has fallen in recent waves – dropping down to 57% in Wave 17 from 66% in Wave 16.

Food prices and food poverty are major and growing concerns for consumers. Concerns about the quality of food and the healthiness of diets are also prevalent.

Activities

Activities done more often in the previous six months were topped by cost saving measures. The least likely activities to be done more often were eating out and ordering takeaways.



- Activities done more often in the previous six months were topped by cost saving measures
- Over half of consumers had swapped branded products for cheaper alternatives (51%) more often
- 41% of consumers had bought reduced to clear products more often
- 31% had cooked and frozen food to eat later more often
- The least likely items for consumers to have done more often were eating out (5%) and ordering takeaways (6%)

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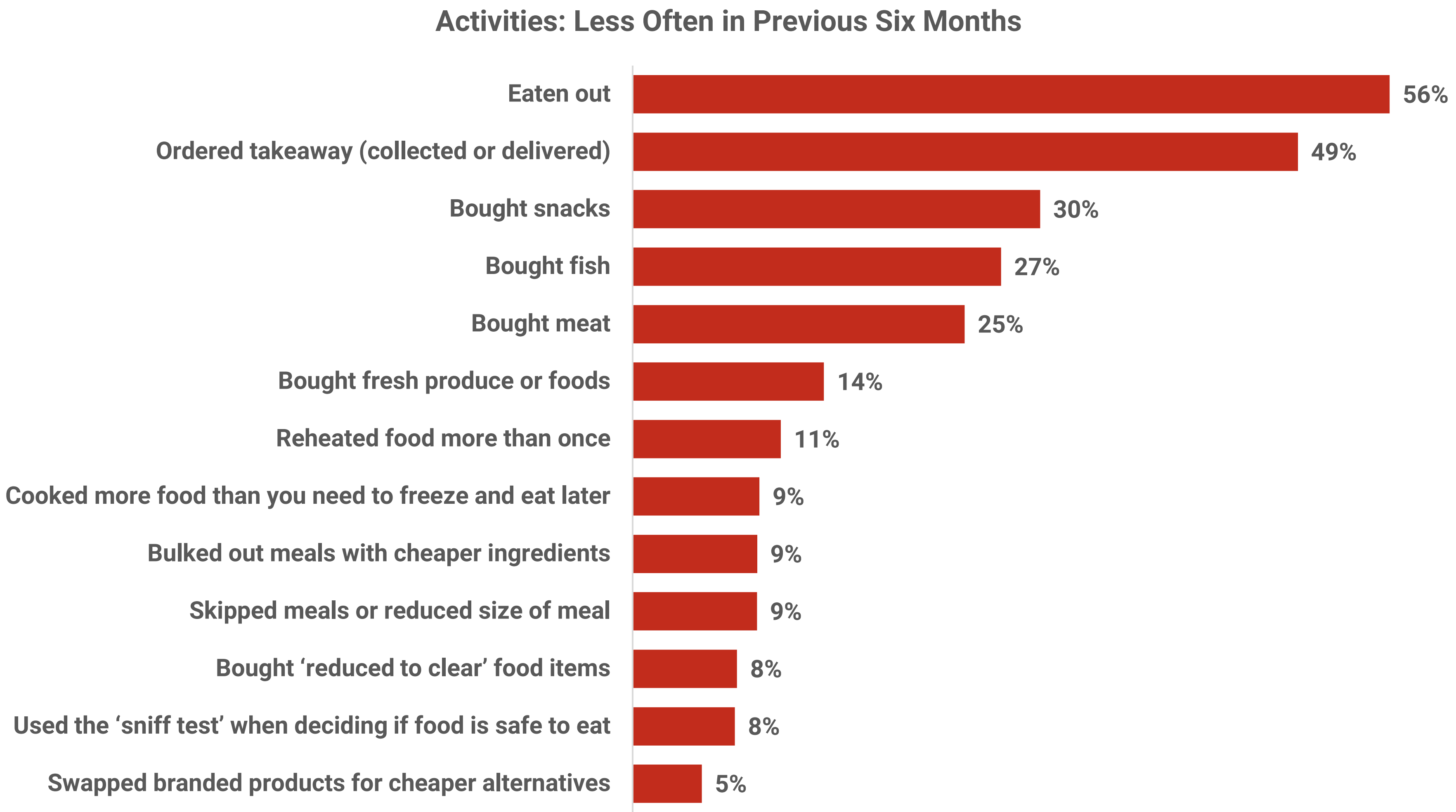
Q10 Over the past 6 months, in order to save money, have you done any of the following more often? Base *n*=1,039
Q11 Still thinking about saving money over the past 6 months, have you bought or done any of the following more or less often? Base *n*=1,039

[UNION DATA]

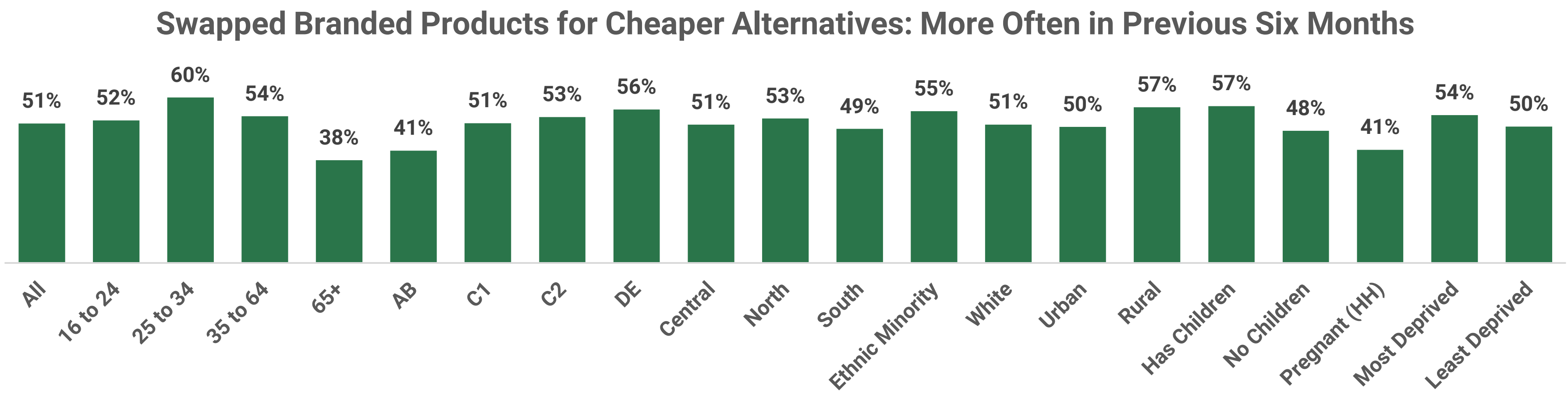
Activities done less often in the previous six months were topped by cost saving measures. The most likely activities to be done less often were eating out and ordering takeaways.

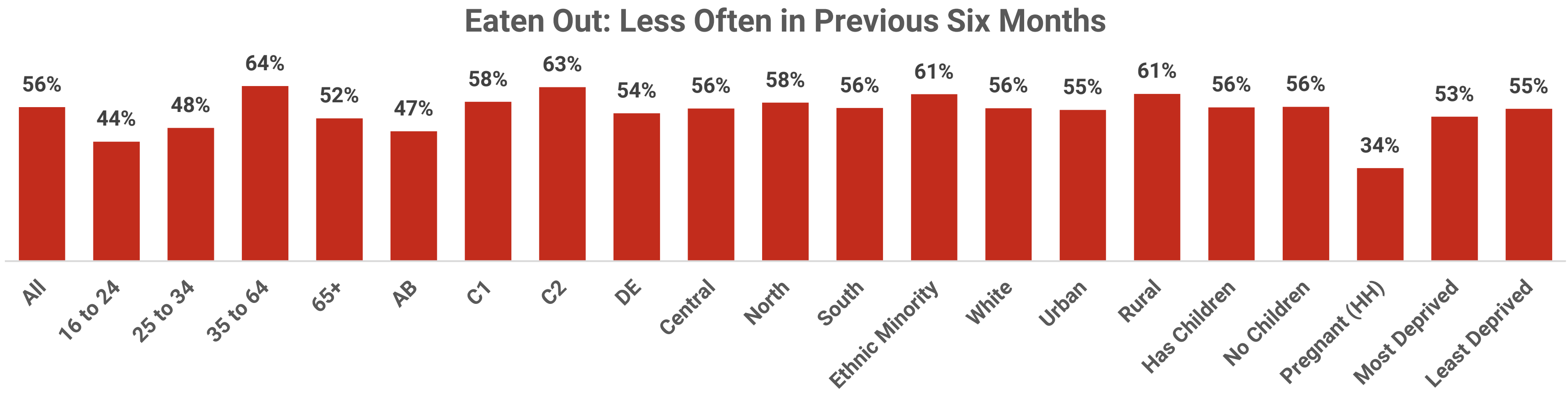


- Activities done less often in the previous six months were topped by eating out and ordering takeaways
- Over half of consumers eaten out less often (56%) while nearly half had ordered takeaways less often (49%)
- Only 5% of consumers had swapped branded products for cheaper alternatives less often

Q10 Over the past 6 months, in order to save money, have you done any of the following more often? Base *n*=1,039
Q11 Still thinking about saving money over the past 6 months, have you bought or done any of the following more or less often? Base *n*=1,039

Social Grade AB, consumers aged 65 or older and households with someone pregnant were the least likely to have swapped branded for unbranded products. Consumers aged 35-64 and Social Grade C2 were the most likely to have eaten out less often.





- Swapping branded products for cheaper alternatives was correlated with Social Grade: 41% of AB had done this more often in the previous six months compared to 56% in Social Grade DE
- Social Grade AB, consumers aged 65 or older and households with someone pregnant were the least likely to have swapped branded for unbranded products
- Households with someone pregnant were unlikely to have changed their behaviour in the previous six months: 41% had changed to generic products and 34% had eaten out less often

Food Standards Scotland

Q10 Over the past 6 months, in order to save money, have you done any of the following more often? Base *n*=1,039
Q11 Still thinking about saving money over the past 6 months, have you bought or done any of the following more or less often? Base *n*=1,039

[UNION DATA]

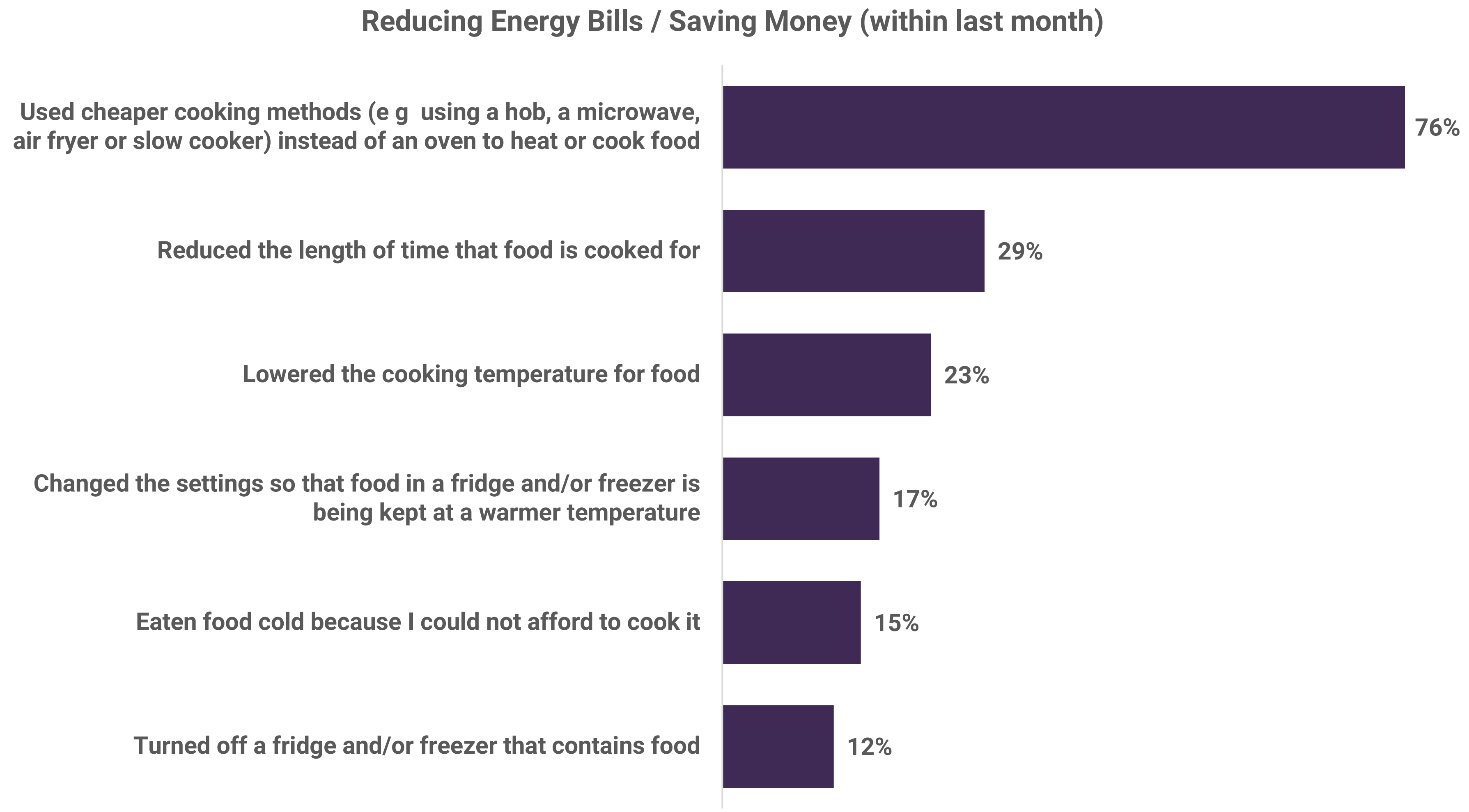
Activities – Summary

- Activities done more often in the previous six months were topped by cost saving measures.
- Over half of consumers had swapped branded products for cheaper alternatives (51%) more often.
- 41% of consumers had bought reduced to clear products more often.
- The least likely activities to be done more often were eating out and ordering takeaways.
- These were also the most likely activities to be done less often.
- Over half of consumers eaten out less often (56%) while nearly half had ordered takeaways less often (49%).
- Swapping branded products for cheaper alternatives was correlated with Social Grade: 41% of AB had done this more often in the previous six months compared to 56% in Social Grade DE.

Changes in activities were dominated by cost saving measures. Swapping branded products for cheaper generic alternatives was the most common thing to have done more often while spending on luxuries such as eating out or ordering takeaways have been reduced.

Affordability

Three-quarters of consumers had saved on energy bills by using cheaper cooking methods.

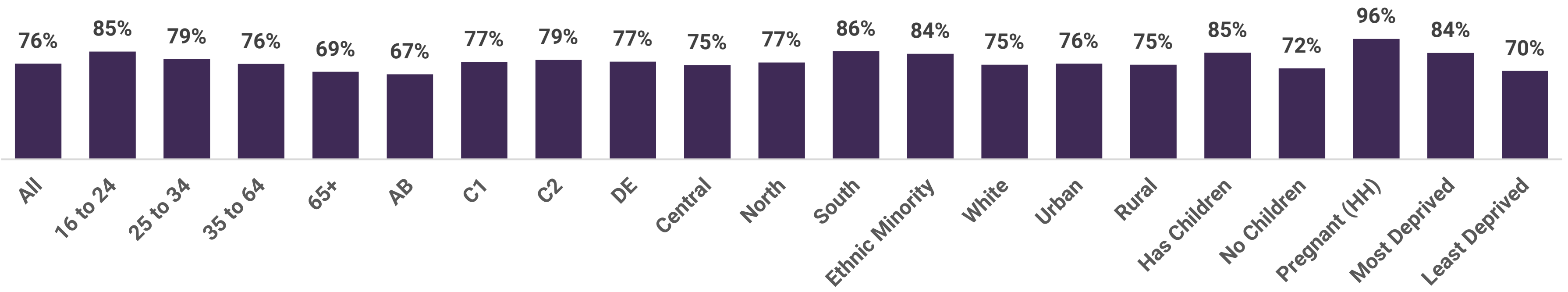


- By far the most common method of reducing energy bills in a food related activity was to use a cheaper cooking method: 76% of consumers had done this in the last month
- Of more concern is that 29% had reduced the length of time food is cooked for and 23% had reduced cooking temperatures
- These findings may indicate that consumers are endangering themselves in order to save money

Q12 In the last month, which, if any, of the following have you done to reduce your energy bills and save money? Base *n*=1,039

Riskier ways of food preparation by reducing cooking time or lowering cooking temperatures were more common in households with someone pregnant, young people, Ethnic Minority respondents and those with children.

Used cheaper cooking methods (e g using a hob, a microwave, air fryer or slow cooker) instead of an oven to heat or cook food (in last month)



Reducing Cooking Time or Lowering Cooking Temperatures (in last month)

- Using cheaper cooking methods was most popular for those with a pregnancy in the household (96%), those with children (85%), in South (86%), young people aged 16-24 (85%), Ethnic Minority respondents (84%) and the most deprived (84%)
- Riskier ways of food preparation by reducing cooking time or lowering cooking temperatures were more common in households with someone pregnant, young people, Ethnic Minority respondents and those with children
- It's not clear why these riskier behaviours are so much more common in these groups

Q12 In the last month, which, if any, of the following have you done to reduce your energy bills and save money? Base *n*=1,039

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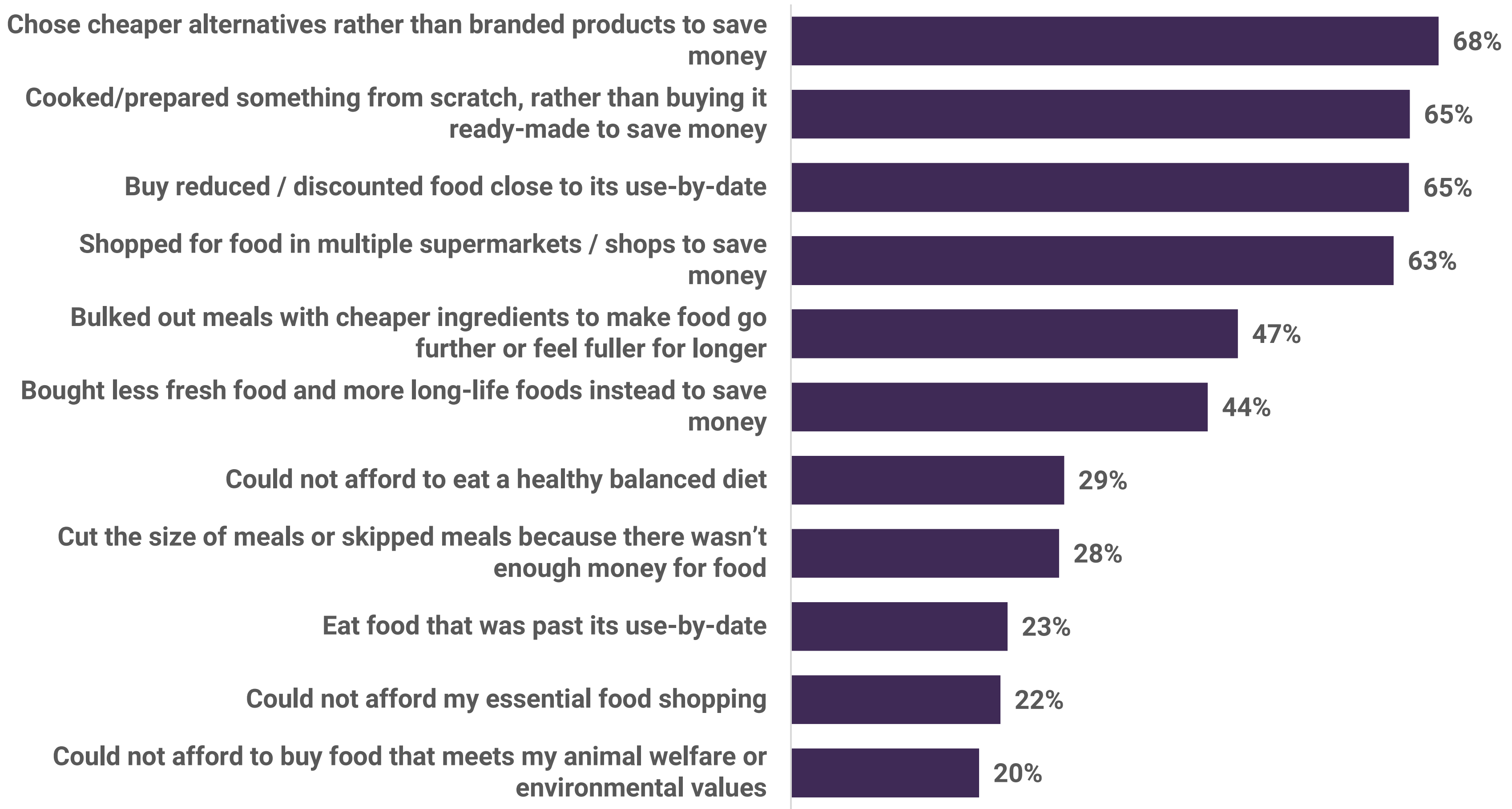
Around two-thirds of consumers were saving money by switching to generic products, cooking from scratch, buying reduced items and shopping around for items in multiple supermarkets.

Money Saving Activities / Affordability (within last month)



- Around two-thirds of consumers were saving money by switching to generic products (68%), cooking from scratch (65%), buying reduced items (64%) and shopping around for items in multiple supermarkets (63%)
- The most concerning findings were that 29% could not afford to eat a healthy balanced diet while 28% were either making meals smaller or skipping meals
- Similarly, over one-fifth (22%) could not afford essential shopping

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Q14 In the last month, did any of the following apply to you, or someone else in your household? I, or someone in my household... Base *n*=1,039
Q15a In the last month, did you, or someone else in your household buy reduced / discounted food close to its use-by-date to save money? Base *n*=1,039
Q15b In the last month, did you, or someone else in your household eat food that was past its use-by-date because they couldn't afford to buy more food? Base *n*=1,039

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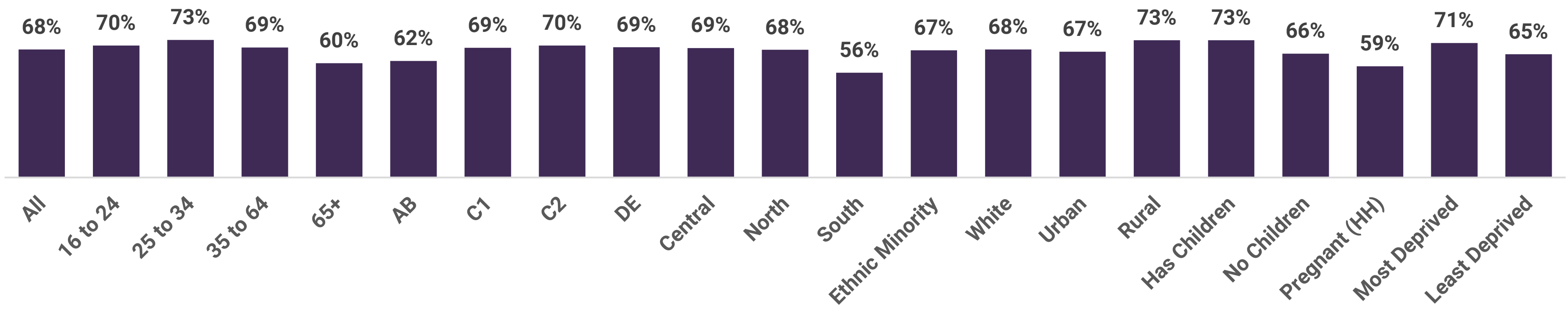
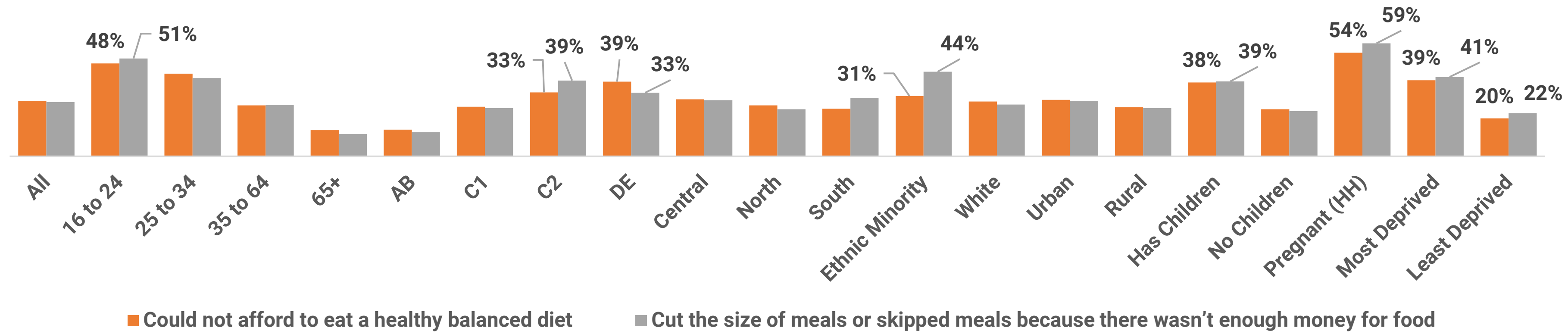
Most consumers are swapping to unbranded products to save money. The most socio-economically disadvantaged have a much higher likelihood of not being able to afford a balanced diet or skipping meals compared to the least disadvantaged.

Chose cheaper alternatives rather than branded products to save money (in last month)



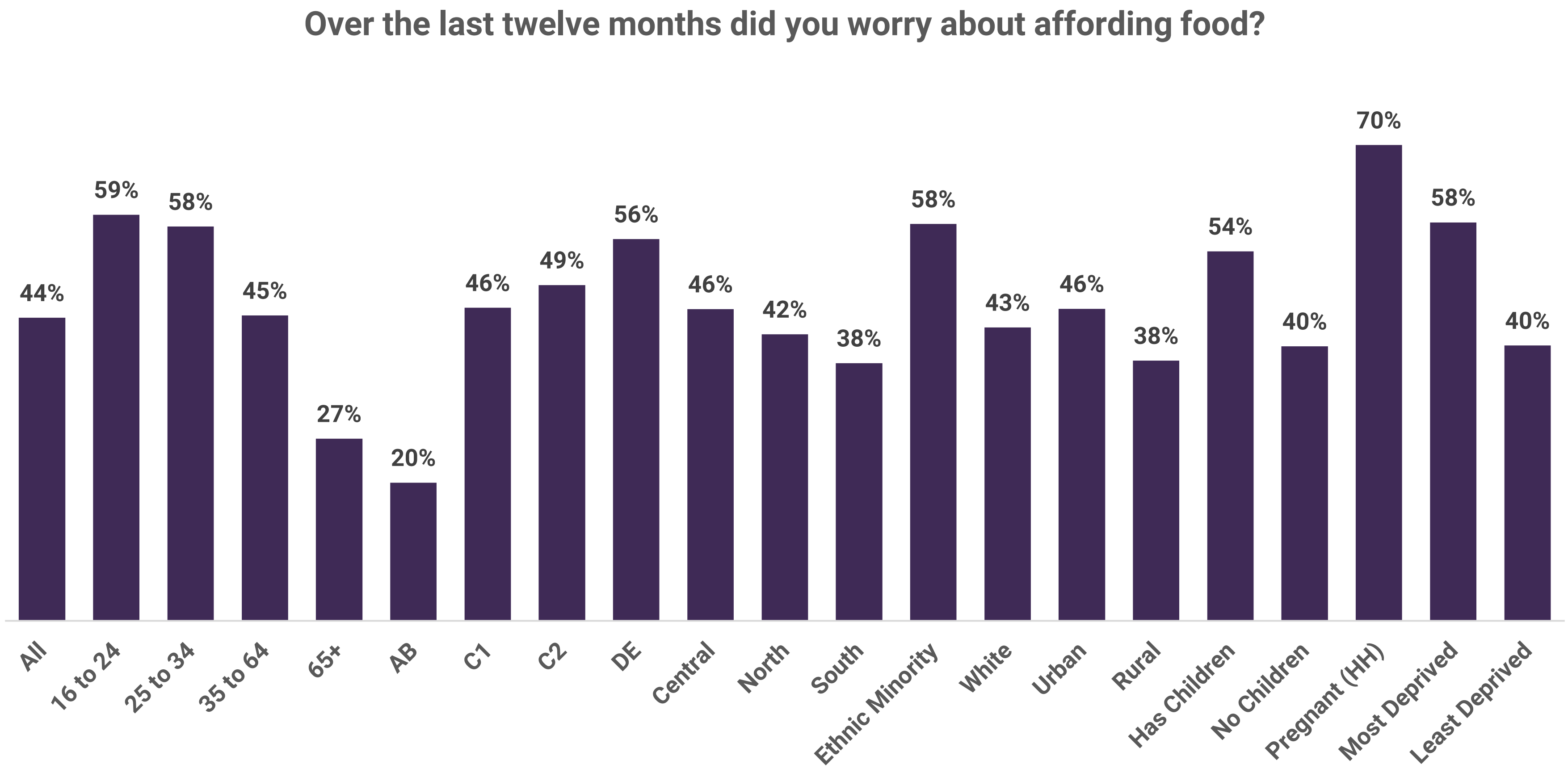
Could not Afford Balanced Diet or Cut/Skipped Meals (in last month)



- Choosing generic rather than branded products was a popular way to save money across demographics. There was a slightly higher percentage from Rural areas (73%), aged 25-34 (73%), those with children (73%) and the most deprived (71%)
- Not being able to afford a balanced diet or cutting/skipping meals is correlated strongly with socio-economic factors.
- The most deprived versus least deprived SIMD quintiles indicate that the likelihood of these food poverty indicators nearly doubles for the most deprived when these groups are compared

Q14 In the last month, did any of the following apply to you, or someone else in your household? I, or someone in my household... Base *n*=1,039

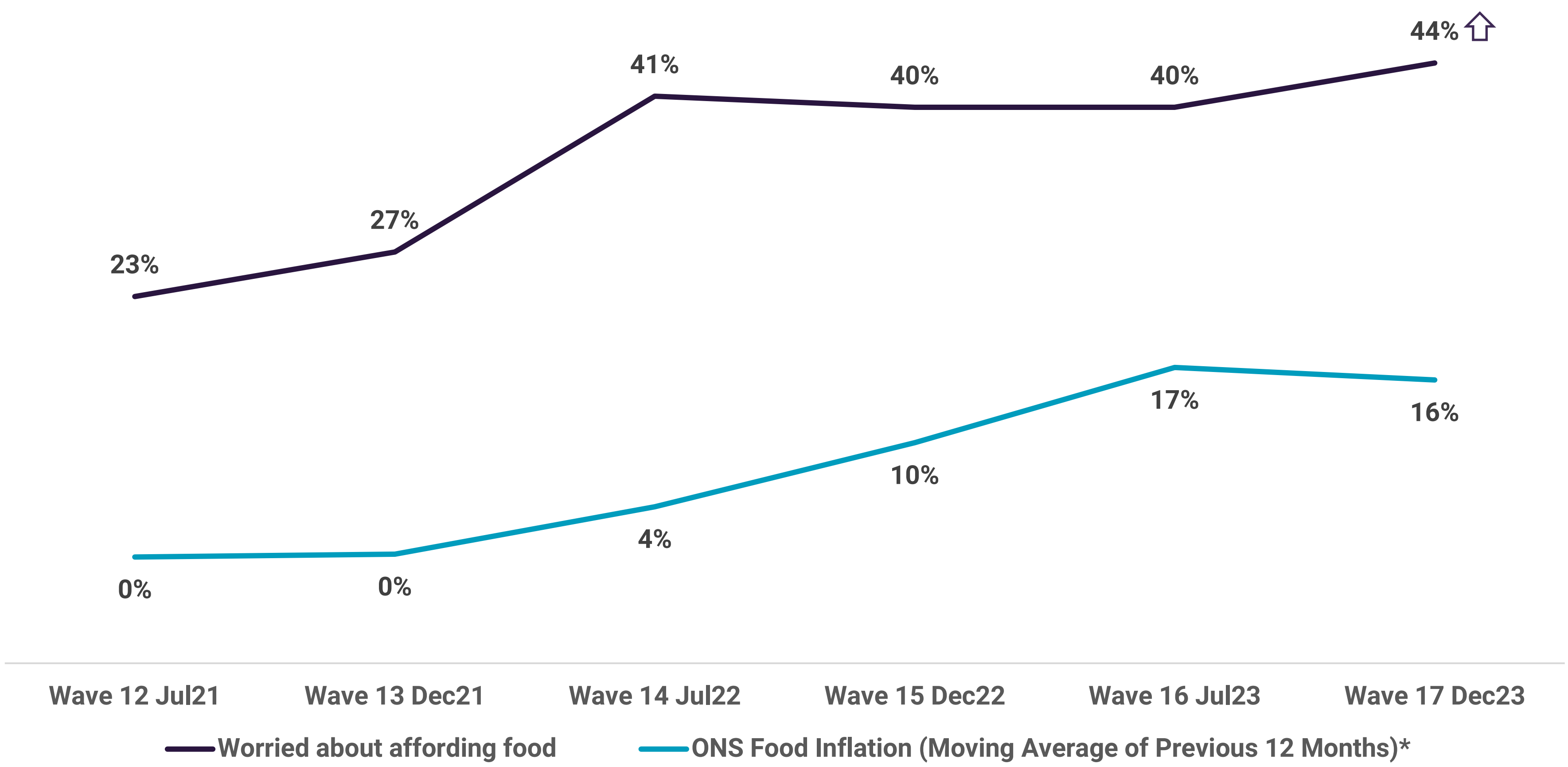
Worrying about affording food is strongly correlated with socio-economic factors. The most economically deprived, Ethnic Minority respondents and Social Grade DE had very high levels of worry. However, households with someone pregnant in the household were the most worried.



- Households with someone pregnant in the household were the most worried about affording food over the past 12 months (70%)
- Households with children were also affected with 54% worried about affording food
- Socio-economic factors indicate large differences with Social Grade DE being around three times more likely than Social Grade AB to have worried about affording food
- Similarly, the most deprived SIMD quintile was around 1.5 times as likely as the least deprived to have worried about affording food
- Ethnic Minority respondents were also at higher risk (58%)

Q13 Over the last twelve months did you worry about affording food? Base *n*=1,039

Worry about affording food in the past 12 months has increased in Wave 17 to 44%, up from 40% in Wave 16.



- Consumers worrying about affording food saw a considerable uptick between December 2021 and July 2022
- This period coincided with the Russian invasion of Ukraine and the subsequent higher energy and fertiliser prices
- Since that time, concerns about affording food have remained about 40%
- This wave represents a further increase to 44% up from the 40% to 41% seen since July 2022
- There figures also track with UK food inflation recorded by the Office for National Statistics (ONS)

Q13 Over the last twelve months did you worry about affording food? Base n=1,039 All waves from Wave 12 to Wave 16 *n*>1,000
* https://www.ons.gov.uk/economy/inflationandpriceindices/articles/costoflivinginsights/food
Note that inflation has a cumulative effect and price rises slowed rather than stopped in the latter part of 2023.
"The overall price of food and non-alcoholic beverages rose around 26% between December 2022 and December 2023" Ref: https://www.ons.gov.uk/economy/inflationandpriceindices/articles/costoflivinginsights/food

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Affordability – Summary

- Over three-quarters of consumers has changed cooking methods to save money while 29% had reduced the length of time food is cooked for and 23% had reduced cooking temperatures which could impact food safety.
- These riskier methods of food preparation were more common in households with someone pregnant, young people, Ethnic Minority respondents and those with children.
- Around two-thirds of consumers were saving money by switching to generic products, cooking from scratch, buying reduced items and shopping around for items in multiple supermarkets.
- The most socio-economically disadvantaged have a much higher likelihood of not being able to afford a balanced diet or skipping meals compared to the least disadvantaged.
- Worrying about affording food is strongly correlated with socio-economic factors. The most economically deprived, Ethnic Minority respondents and Social Grade DE had very high levels of worry - households with someone pregnant in the household were the most worried.
- Worrying about affording food increased between December 2021 and July 2022.

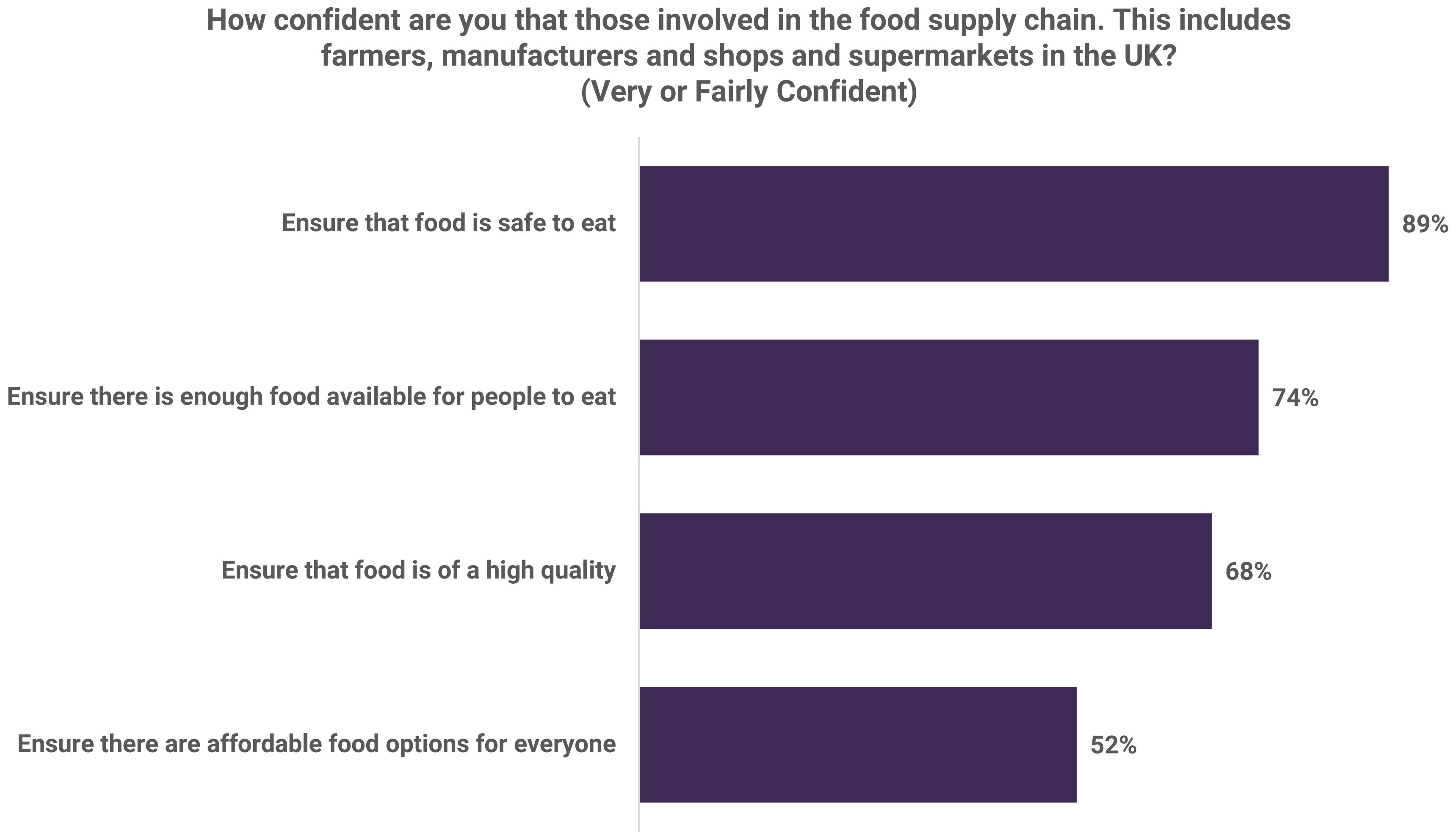
The cost of living is not only impacting the way that consumers budget for their shopping. It has also impacted the way that people cook and may be causing an increase in riskier cooking methods.

[UNION DATA]

Food Security

Food Standards Scotland

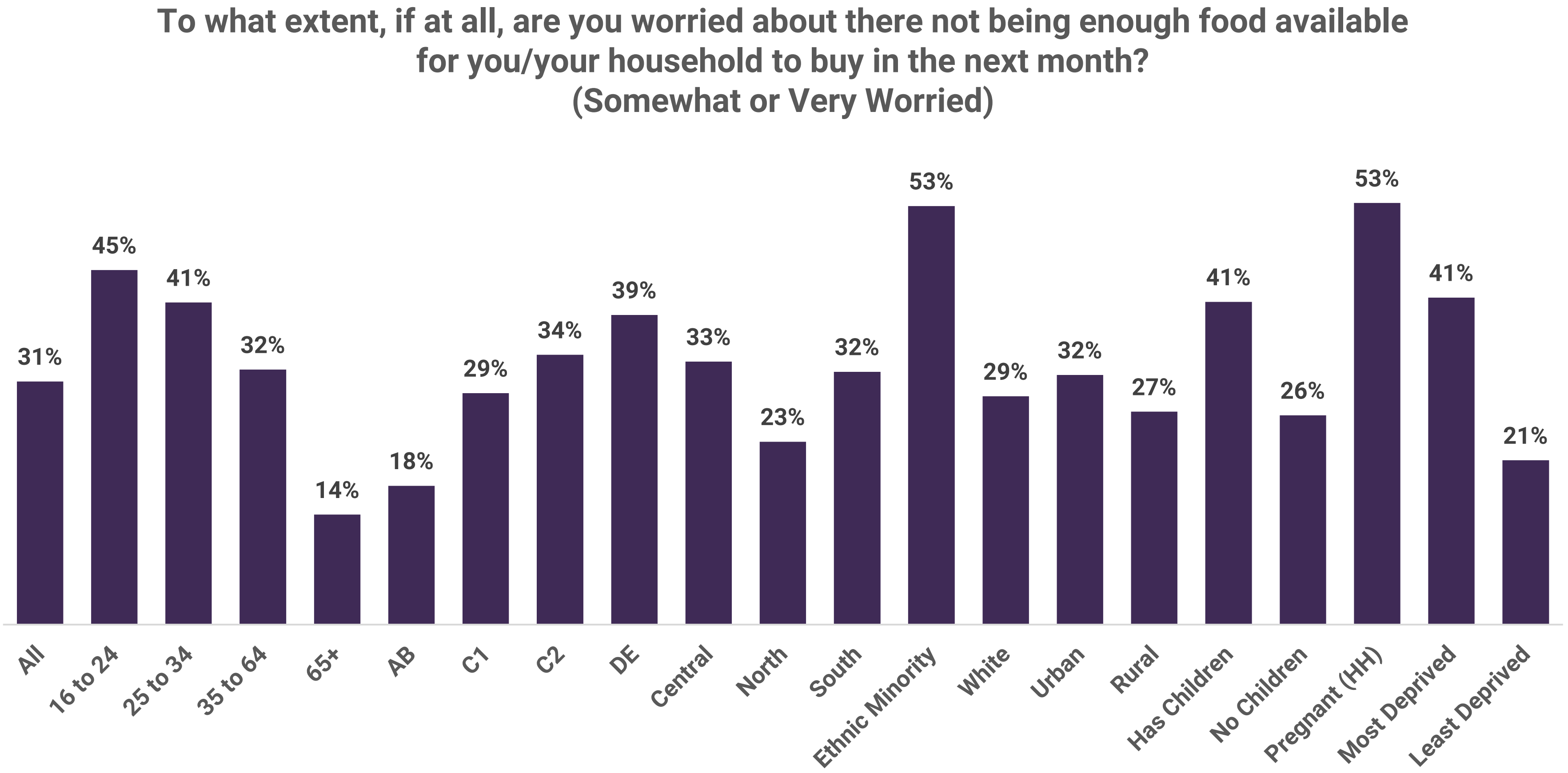
There is very high confidence in the supply chain providing food that is safe to eat. However, confidence is much lower in the supply chain delivering affordable food options.



- Most consumers have confidence in the supply chain. However, there is a higher level of confidence with some aspects compared to others.
- 89% of consumers are confident that the food is safe to eat and three-quarters (74%) think this supply chain will ensure there is enough to eat
- Two-thirds (68%) had confidence in the quality of food but only around a half (52%) were confident that the supply chain would deliver affordable food options

Q16 How confident are you in the food supply chain? That is all the processes involved in bringing food to your table including farmers, manufacturers and shops and supermarkets How confident are you that they: Base *n*=1,039

Around one-third of consumers were worried about food availability in the next month. Over half of households where someone was pregnant and Ethnic Minority respondents were worried.



- Around one-third of consumers were worried about food availability in the next month (31%)
- Over half of households where someone was pregnant (53%) and Ethnic Minority respondents (53%) were worried
- This also varies by socio-economic group, with DEs more than twice as worried as the more affluent ABs, and also by SIMD indicating that the most disadvantaged are more likely to worry.

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Food Security – Summary

- There is very high confidence in the UK supply chain providing food that is safe to eat.
- 89% of consumers are confident that the food is safe to eat and three-quarters (74%) think that they will ensure there is enough to eat
- Confidence is much lower in the supply chain delivering affordable food options.
- Around one-third of consumers were worried about food availability in the next month.
- Over half of households where someone was pregnant and Ethnic Minority respondents were worried about food availability.
- Worry about food availability is correlated with socio-economic factors suggesting that there is an inference that food is easier to acquire for those with greater wealth should any shortages occur.

Confidence in the safety of the UK food supply chain is high. However, there are fears about food costs and availability in the future especially amongst the most socially disadvantaged.

Key Findings

Awareness, Trust and Visibility	Issues of Concern for Consumers	Activities	Affordability	Food Security
Awareness of FSS is very high and, reassuringly, trust of FSS is also very high. However, there may be some work to be done in improving awareness in Ethnic Minorities, young adults and non-shoppers.	Food prices and food poverty are major and growing concerns for consumers. Concerns about the quality of food and the healthiness of diets are also prevalent.	Changes in activities were dominated by cost saving measures. Swapping branded products for cheaper generic alternatives was the most common thing to have done more often while spending on luxuries such as eating out or ordering takeaways have been reduced.	The cost of living is not only impacting the way that consumers budget for their shopping. It has also impacted the way that people cook and may be causing an increase in riskier cooking methods.	Confidence in the safety of the UK food supply chain is high. However, there are fears about food costs and availability in the future especially amongst the most socially disadvantaged.

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