

Wave 14 Tracker and Cost of Living Survey

1 Purpose of the paper

- 1.1 The purpose of this paper is to update the board on the recent [Consumer Tracker survey findings](#) and advise of an additional survey exploring consumer behavioural change in response to the rising cost of living. The paper highlights key findings, resulting actions taken and future plans.
- 1.2 The Board is asked:
 - 1.2.1 to note the approach and resulting activity.
 - 1.2.2 to consider and discuss FSS' future position and engagement in relation to the cost of living crisis.

2 Strategic aims

- 2.1 This work plays to our core purpose, 'to protect consumers in Scotland from food safety risks and promote healthy eating', and supports 2 of the 5 FSS strategic outcomes; 4 – Consumers are empowered to make positive choices about food, and 5 – FSS is trusted and influential.

3 Background

- 3.1 The Food in Scotland Consumer Tracking Survey has been running for 8 years and allows us to monitor attitudes, knowledge and reported behaviours relating to food amongst a representative sample of Scotland's population, identifying changes over time. It is one of our main tools to understand and track consumer attitudes.
- 3.2 Each wave has 3 component parts: a set of core questions replicated at each wave; a key question module focusing on either food safety and authenticity or diet and nutrition; and topical question modules relating to areas of focus for FSS at a particular point in time, for example allergens or vitamin D.
- 3.3 The results of the survey are used in many ways: to track and inform work across the organisation; to prompt further research requirements; and to guide communications activity and relevancy of consumer messages.

4 Consumer Tracker Findings

- 4.1 Wave 14 of the tracker was conducted in late summer and was [published on the website in October](#). Generally speaking, results remained consistent with previous waves with a couple of exceptions which are outlined in 4.2 to 4.8.

- 4.2 Perhaps unsurprisingly, there has been an increase in concern around food prices and availability with concern about the possibility of food supply shortages up from 65% to 70% and concern around the price of food up from 64% to 75%. Considerable percentage increases given the relatively stable figures in previous waves.
- 4.3 The diet and nutrition responses show that overall, the public recognise that obesity and unhealthy diets are a problem in Scotland. They also understand the potential health issues related to unhealthy diets and, while healthy eating is seen to be important, there is an acknowledgement that they could / should potentially do more to eat healthily themselves with over half recognising that discretionary foods are being consumed too frequently.
- 4.4 The cost of living is a barrier here too which makes it difficult to identify a strong motivation for change. For example, while many support the idea of changes to the out of home environment to encourage healthier eating, in the context of the cost of living, solutions which involve increasing costs of unhealthy foods, restricting promotional pricing and reducing portion sizes are not favoured. Support for restricting marketing and promotions of some unhealthy food and drinks has dropped from 57% in wave 12 to 49% in this wave.
- 4.5 These results have impacted on how we communicate with the public. For example, we deemed it inappropriate to run a phase 2 of the Eat Well Your Way consumer campaign, and instead have delivered messaging and content organically around healthy eating on low budgets and shifted the tone to not only recognise the challenges but offer support and advice where appropriate. This is an area we can continue to build on.
- 4.6 Awareness of FSS remains high with more than 8 in 10 adults in Scotland having heard of the organisation, with half of those saying they understand FSS' remit well. This suggests there is still some room to grow knowledge, through promotion of the work being done by FSS particularly in areas such as healthy eating / nutrition, food safety at home and food crime which are not currently strongly associated with FSS. Current campaigns raising awareness of campylobacter and the importance of vitamin D, as well as planned activity around food safety and food crime at Christmas will contribute towards increasing awareness.
- 4.7 Reassuringly, those who are aware of FSS trust the organisation to do its job, and give positive ratings across all key measures, particularly relating to the strategic aims around food safety and informed consumers.
- 4.8 Other interesting increases include people buying more fruit and veg in season – up from 51% to 56%, and in the labelling module there was an increase in those considering the amount of calories consumed per day – up from 26% to 32%.

5 Cost of Living - Further Research

- 5.1 Results pointing to increasing levels of concern about food affordability in Scotland prompted us to undertake a bespoke piece of research to understand in more detail how consumers may be changing their behaviours to save money.

5.2 The online research took place in October with a representative sample of 1085 people from across Scotland. Questions looked at behaviours relating to areas of concern for FSS such as food safety at home and food purchasing behaviours.

5.3 The key findings were quite alarming and the bullet points below highlight marked differences in behaviours. Note that the questions were couched as 'have you done more or less of X since April this year' in order for us to measure differences from the onset of the cost of living crisis:

- 70% are more worried about affording food, in particular those that fall into the C2DE socio economic group and those with mental health conditions.
- Almost half of adults have eaten food past its use by dates, with 29% of these claiming to be doing it more often.
- 10% have changed the thermostat in their fridge.
- 41% have changed methods of cooking.

Given these behaviours could have significant impacts on consumer health and may lead to food poisoning, we have used the results to inform a strand of our marketing and communications activity. These included, but are not limited to: a press release highlighting the findings and associated risks; and publishing of findings on the website with relevant links to the [Eat Well, Your Way](#) tool and other sections of the FSS website where consumers can find helpful information. We also developed a social media plan highlighting messages around use by dates, food waste and 'kitchen crimes'.

5.4 With food inflation continuing to increase, the cost of living crisis is not going away, and will potentially worsen over the coming months. For this reason, the bespoke survey will also run again in January 2023 to allow us to monitor behaviours and potentially give us a further opportunity to communicate externally and inform and protect vulnerable consumers.

5.5 We are also in the process of reviewing the questions in wave 15 of the consumer tracker (which will be conducted in December) with a view to incorporating some of the questions to give us comparable metrics for December.

6 Discussion

6.1 Given that the cost of living cuts across a number of policy areas, led predominantly by Scottish Government (though impacted by many different factors), what is our role within this space and what should our future ambitions be?

6.2 Have we pitched our current messaging at the right level, food safety and the unforeseen consequences in behavioural change related to food, or are there other ways in which we can make a difference/ impact in this space? An example could be to make use of our networks and contacts to highlight where issues are and encourage retailers to support consumers to purchase healthy items by making them cheaper where possible or reducing food waste. This makes the shift from solely

focussing on the consumer facing parts to other areas where we could influence. Of course, any shift in focus or dial up in effort should also be looked at through the lens of the prioritisation exercise.

6.3 Note that the FSA has been running a similar work stream and we are in regular contact with them to ensure we keep abreast of developments. Particularly important given we are committed to supporting the joint FSA/FSS annual report and there is a specific chapter on the cost of living crisis. There may also be opportunities to collaborate to strengthen external communications through data sharing and joint releases when appropriate.

7 Identification of risks and issues

7.1 We do not foresee any risks associated with this work stream though it does work towards mitigating a strategic risk, that of misinformation. Risks will be considered again depending on the outcome of discussions and future direction.

The Board is asked:

- to note the approach and resulting activity and
- to consider and discuss FSS' future position and engagement in relation to the cost of living crisis

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Annex A

Equality Impact Assessment and Fairer Scotland Duty

- 1.1 No assessments were considered necessary given there is no policy recommendation.
- 1.2 No Fairer Scotland Duty assessment needed at present, any future need will be determined by the steer on FSS' future ambitions.