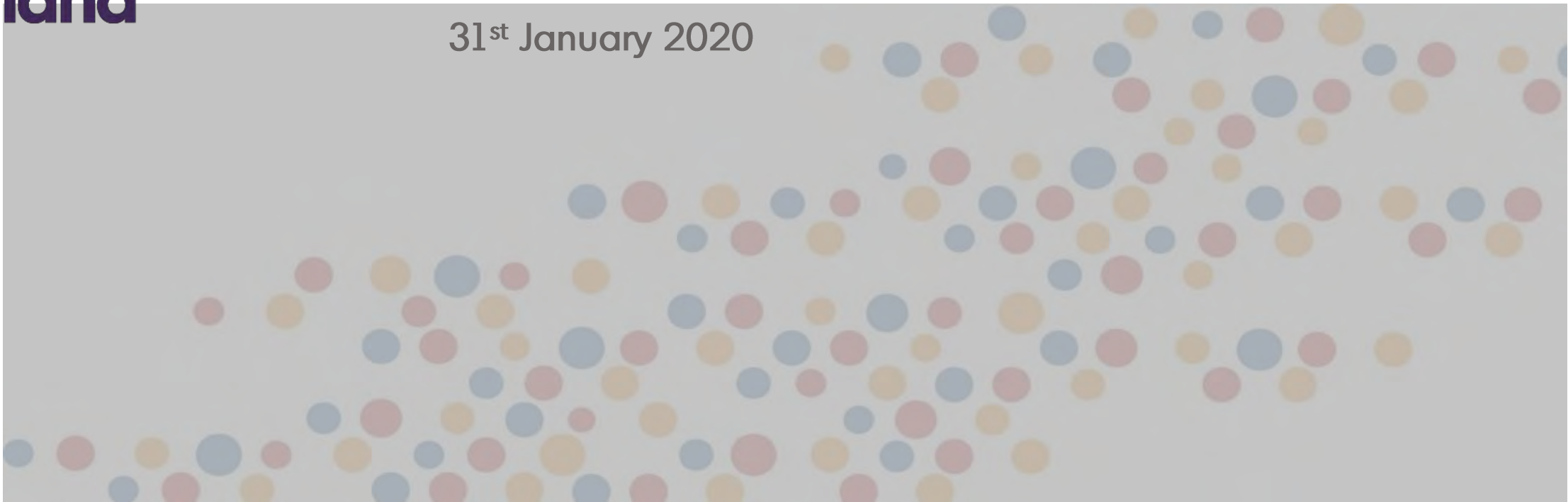




# Brexit Insight Research Findings

Debrief

31<sup>st</sup> January 2020





# Contents

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1. Brief & Objectives
2. Methodology
3. Sample Profiles
4. Context
5. Aspects of the Food Environment
6. Information Needs & Role for FSS



# Brief / Method / Sample Profile



# The Brief

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- In view of Britain's exit from the EU at the end of January, FSS was keen to gain a deeper insight into consumer concerns and their likely response to any changes in the pricing, availability, standards and safety of food.
- Understanding how consumers respond to potential changes in food standards was of particular interest, as was gaining insight into how consumers may make decisions and trade-offs as a result of any changes.
- Specific objectives were set as follows:
  - To understand consumer attitudes and concerns relating to the possible effects of Brexit in Scotland relating to safety standards, price, availability, fraud, trade deals with other countries etc;
  - Understand what risks consumers may take as a result of Brexit-related changes;
  - Gain insight into the potential role for FSS in supporting and advocating for consumers in the post Brexit landscape.



# Our Methodology

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- Bespoke omnibus survey
  - Conducted by Scottish omnibus provider - Scotpulse
- 5 key questions – each with several statements / elements
  - 1 voting intention question for analysis purposes
- Fieldwork conducted online
- Representative sample of **1122** adults across Scotland
- Fieldwork dates: 16<sup>th</sup> – 19<sup>th</sup> January 2020

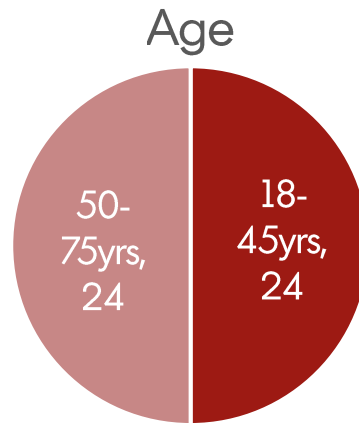
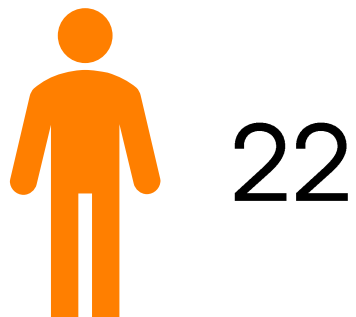
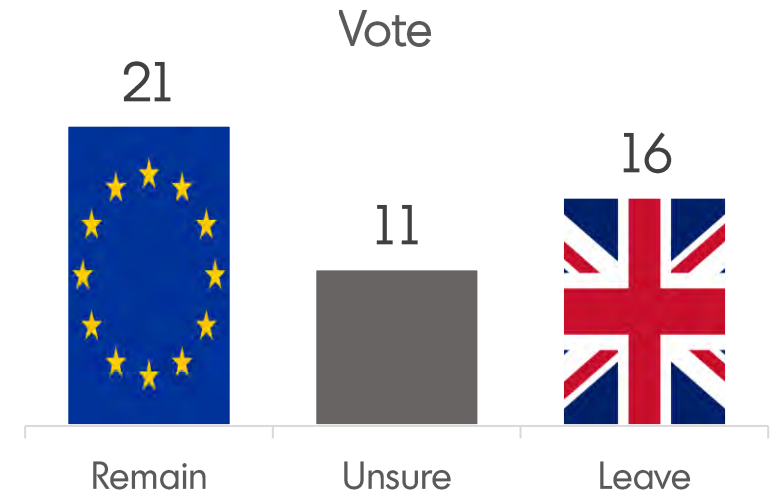
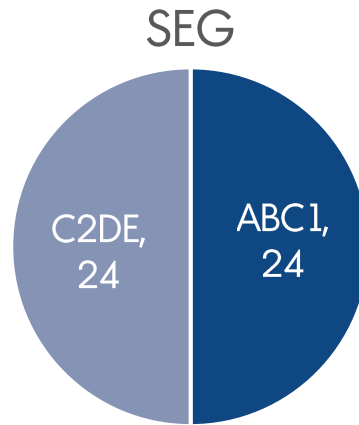
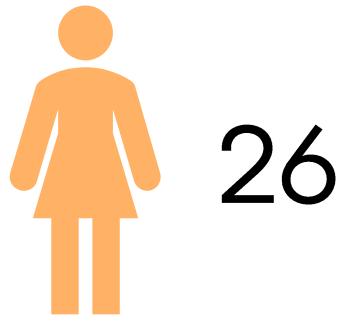


- 6 qualitative group discussions
- Total of **48** participants
- Recruited to match a detailed specification by local recruitment teams
  - Using a range of methods including: in-street, telephone and snowballing
  - All respondents screened using detailed recruitment questionnaire
- Groups split by age; SEG; remain/leave
- Group locations: Aberdeen; Glasgow; Peebles
- Fieldwork dates: 16<sup>th</sup> & 21<sup>st</sup> January 2020

All research was undertaken in strict accordance with MRS Code of Conduct and GDPR legislation

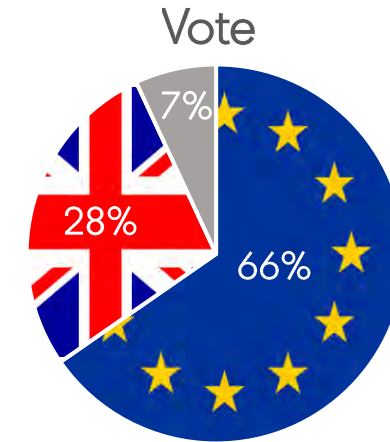
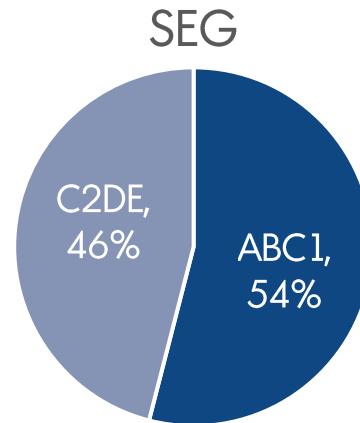
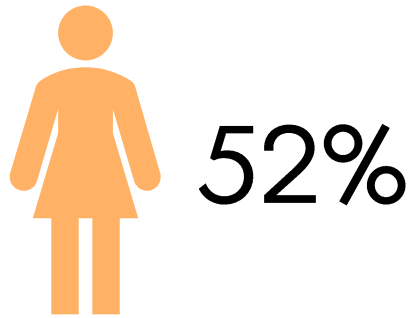


# Sample Profile – Qualitative (n=48)

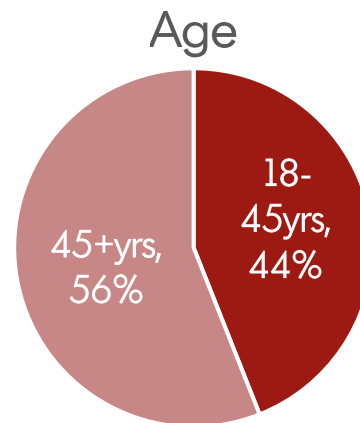
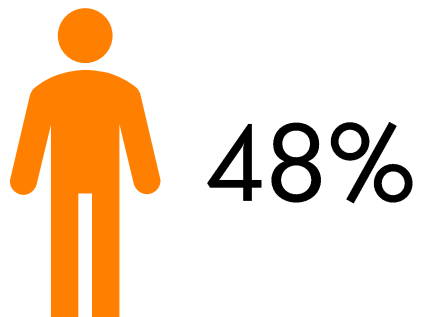




# Sample Profile – Quantitative (n=1122)



■ Remain ■ Leave ■ Not stated



East Central 30%  
West Central 41%  
North 29%

Omnibus research conducted by Scotpulse. Data weighted on age and gender.

Q2 If a referendum on whether the UK should leave or remain in the EU was held tomorrow, how would you vote? Base (all respondents): 1122



# Context





# Different Perspectives

- Important to note that the qualitative research highlighted many participants had not given detailed thought to several of the issues discussed → thoughts and views became more fully formed on prompting and as discussion progressed
  - We believe this is also the reason behind some differences between qualitative and omnibus results – useful to have qualitative feedback to unpick / illuminate quantitative results
- Several key factors affected views:
  1. Remain vs leave
    - General sense that remainers were more broadly and deeply concerned about the effects of Brexit
    - Leavers believe even if things are worse in the short term, there will ultimately be a positive impact
  2. Level of political engagement
    - Impact on the level of knowledge about potential post Brexit effects
    - Those more engaged knew more, those less engaged had less definitive views
    - Regardless, there were high levels of uncertainty around 'truth' and 'facts'
  3. SEG
    - Affordability / direct impact on individual finances influenced the way participants responded
  4. Age
    - Older groups less likely to be hugely concerned – believing that whatever the impact, life will just carry on

“There might be higher taxes in the short term but only until the extra money is distributed”  
Older, C2DE, Leaver

“They feed you what they want you to ken”  
Older, C2DE, Remainer

“things just carry on”  
Older, C2DE, Remainer



# General Concern About Impacts of Brexit

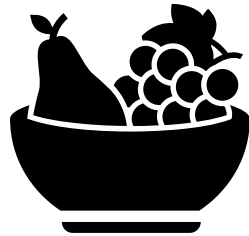
- General levels of concern were higher amongst remainers than leavers
- Spontaneous mentions of a range of aspects:



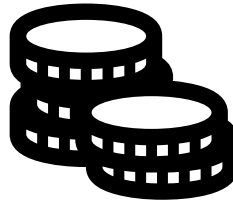
Travel



Job security



Food



Rising prices /  
taxes



Investment in NHS /  
infrastructure



Scottish independence

- Overwhelming sense of uncertainty about impacts on everything - including food
- Coupled with uncertainty about where to turn for credible, trustworthy, truthful information.

“Nobody knows what will happen” Younger, ABC1, Leaver

“We know nothing....that is the problem....lack of information....it is all promises.”  
Older, C2DE, Remainer



# Spontaneous Concerns Relating to Food

- Food was mentioned early in all qualitative groups – definite impact expected
- All groups quickly moved to talking about the ‘worst case scenario’
- **Headline concerns:**
  - Prices increasing
  - Lower availability
  - Lower quality foods ‘flooding’ the market
    - GM, chlorinated chicken, overly processed
  - Impact on UK farmers
  - Animal welfare
- Knowledge about likely impacts was patchy, and largely gleaned from mainstream media
- Leading to widespread view that consumers will only really know the impact when they see it for themselves on the shelves.

“food prices will rise and there might be a GM takeover”  
Younger, ABC1, Remainer

“we’ll not be able to get strawberries or tomatoes any more except for a few weeks in summer” Older, C2DE, Leaver

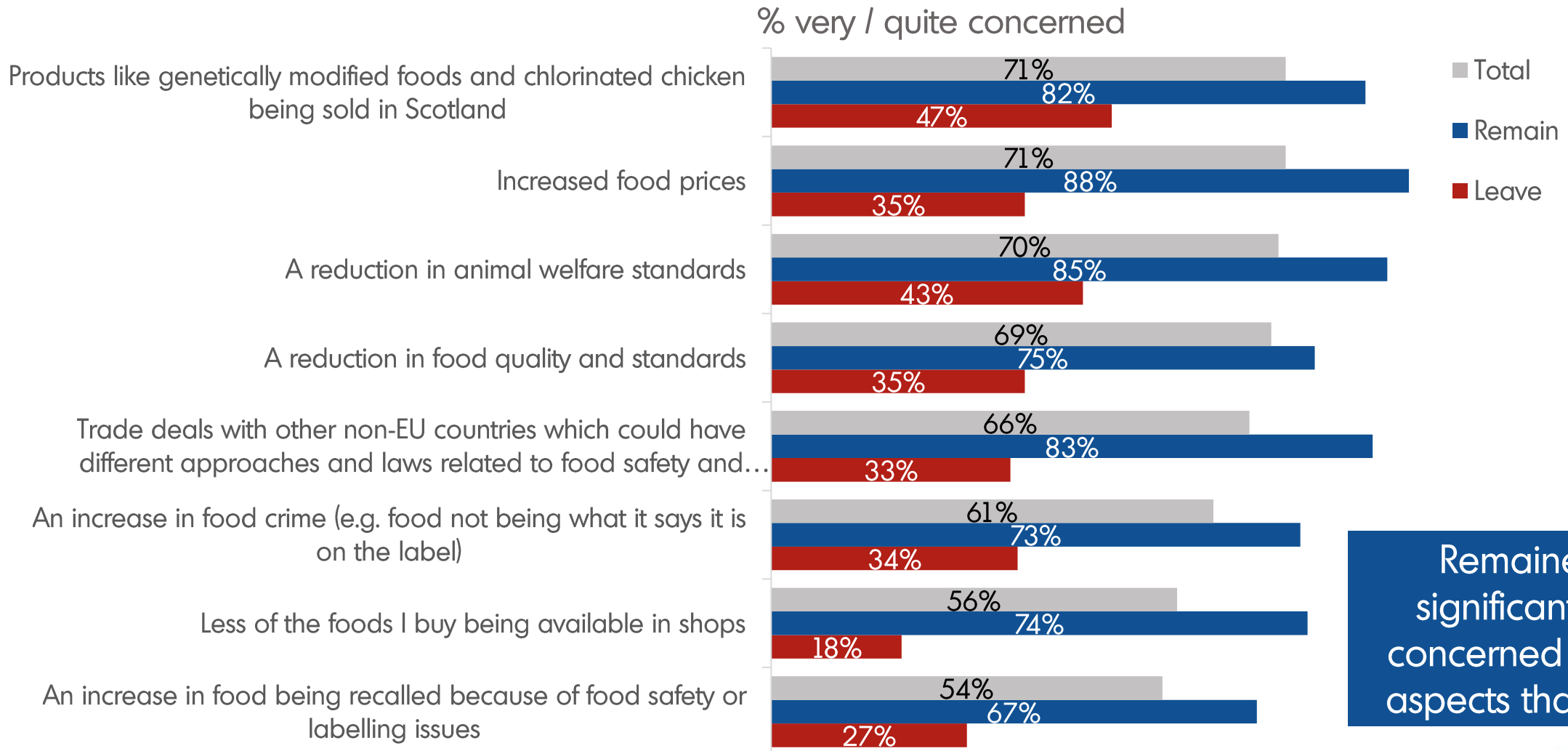
“there could be a shortage of citrus fruits”  
Older, C2DE, Remainer

“what happens if we get food from overseas and they pump it full with who knows what?!”  
Younger, ABC1, Leaver

“we’ll just have to go back to eating things when they’re in season which is no bad thing”  
Older, C2DE, Leaver



# Concern about Food Issues after Brexit



Remainers are significantly more concerned across all aspects than Leavers



High levels of uncertainty mean that concerns about post Brexit UK are largely hypothetical – and as such are rarely definitive and sometimes contradictory. Importantly, this does not necessarily lead to high levels of concern.



# Aspects of the Food Environment

NOTE: Key omnibus data is shown in orange boxes

- *Key questions raised in focus groups are shown in black outlined boxes*



# Trade Deals



- Consumers have limited knowledge about trade deals
  - Process / potential partners / time involved / what happens in the meantime
- Some discussion about sacrifices that may be made to secure a deal (especially with USA)
- Some discussion about impact on UK farmers / food producers – positive and negative
  - Lower availability of some foodstuffs may mean greater market for UK products
  - Trade deals may flood the market, putting UK farmers out of business

“It’s suggested we’ll do trade deals with America but all they’ll do is rip us off...we’ll get rubbish like chlorinated chicken!” Older, C2DE, Remainer

66%  
are worried about the economic impact of new trade deals on Scottish farmers & food businesses (Q4)

65%  
Agree they wouldn’t buy imported foods if it impacted Scottish farmers / food producers (Q4)



# Food Law



- Views range from 'no change' to Brexit ultimately having a 'positive impact'
- Positive impact
  - greater control over our own laws = remove red-tape / tighten controls
- Status quo
  - expectation that laws relating to basic standards are unlikely to change soon

"we'll be in control of our own laws!" Younger, ABC1, Leaver





# Concern - Acceptability - Consumer response

- Confidence / assumption that UK will maintain Food Laws protecting against bad things
  - Lack of understanding of how current laws are made and potential impact post Brexit
- But if people feel that these expectations might not be borne out, concern would be widespread
- It is the implications of poorer, weaker laws that consumers find unacceptable
- .....implications felt in other aspects of the food environment....
- particularly, significantly poorer food safety and food standards



## Omnibus

66% said they were very/quite concerned about trade deals with non-EU countries which could have different approaches and laws related to food safety and standards (Q3)

"If food law changes, everything changes" Older, C2DE, Leaver

- *Who will be responsible for the law and the safety of our food?*
- *What EU laws will the UK Government be keeping, for example over food safety?*
- *With regards to food law would Britain not just copy the same as we have now?*
- *Will FSS retain the current food laws post-Brexit?*



# Food Standards



- General sense that quality and standards of food available **will** be impacted in post-Brexit era
- Negotiation and compromise is an expected part of the trade deals negotiation process
- Leading to adjustments in laws, safety and standards tied to new trade agreements
- Food standards an overarching influence impacting many aspects of the consumer experience



# Concern - Acceptability - Consumer response

- Change anticipated, but no active concern mainly because...
- Expectation / hope that UK will successfully maintain high standards
- But food standards would be the least acceptable of all the food aspects should this change negatively
- Some (lower SEG) prepared to accept lower quality food, if cheaper, but not at the expense of health
- Consumer choice seen as potentially mitigating any change/fall in food standards

## Omnibus

69% said they were very/quite concerned about a reduction in food quality & standards (Q3)

70%

Disagree that changes in food standards do not worry them (Q4)

"Put it this way, if there was any chance that it will make my kids sick, then there's no way I'm buying it" Younger, C2DE, Remainer

"People will have a choice to buy foods that adhere to higher standards if they wish – just as they do now" Older, ABC1, Leaver



# Food Prices



- Most consumers feel prices 'could' go up
  - a lot of uncertainty/many consumers unsure
- Rises expected to be largely short-term
  - reflecting a confidence that the market will adjust and smooth things out
- Some hoped prices would fall
  - but did not anticipate this would happen in the short-term

52%

Agree they will still buy the foods they always have even if they're more expensive than imported foods (Q4)



# Concern - Acceptability - Consumer response

- An area of concern, but not one of great personal concern, because it's anticipated, broadly accepted and expectations have already been adjusted
  - Concern generally higher among lower SEGs
- However, some concerns were raised over the potential impact on those already living in poverty, and the likelihood of increased food prices widening inequalities
- People have 'coping strategies' to deal with price rises
- Consumers are 'savvy' about how to cut the cost of their food bills
- Comfort of accessible, low-cost retail options and wide variety of choice
- If prices rise, people will 'shop around'
- Significantly lower priced new imports would generate suspicion (quality/safety)



## Omnibus

71% said they were very/quite concerned about increased food prices (Q3)

- *Will imported food cost more?*
- *If it's a lot cheaper, you would be asking why?*

"In the long run, things might get better"  
Younger, C2DE, Remainer

"I already pay more because I know I get good quality from my local butcher" Older, ABC1, Leaver

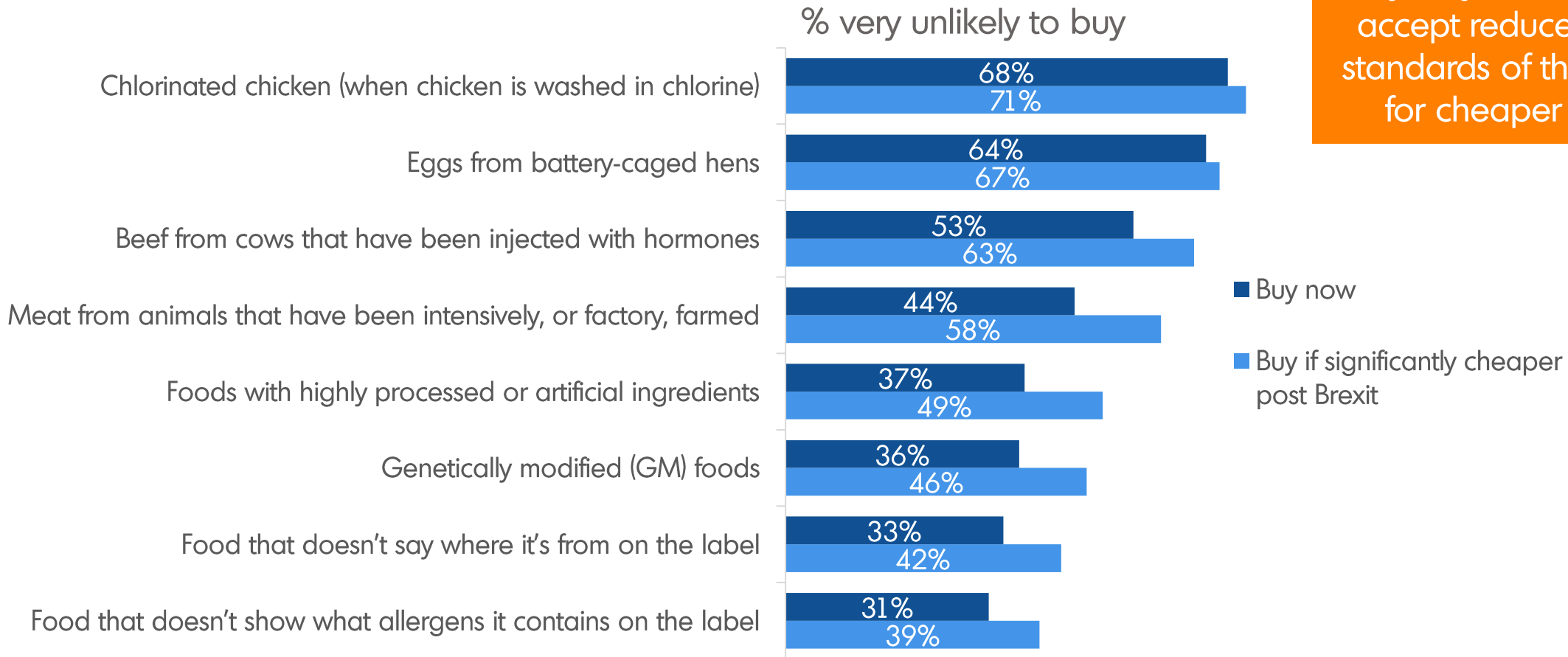
"I'm lucky, if prices go up a bit it won't make much difference to me, but what about the kids I teach who already come to school without breakfast because their family can't afford it" Younger, ABC1, Remainer



# Impact of Cheaper Prices on Purchase Intention

- Omnibus data backs up the suspicion shown by participants in the groups regarding the relationship between cheap food and low quality

84%  
Say they would NOT happily accept reduced quality and standards of their usual foods for cheaper pricing (Q4)



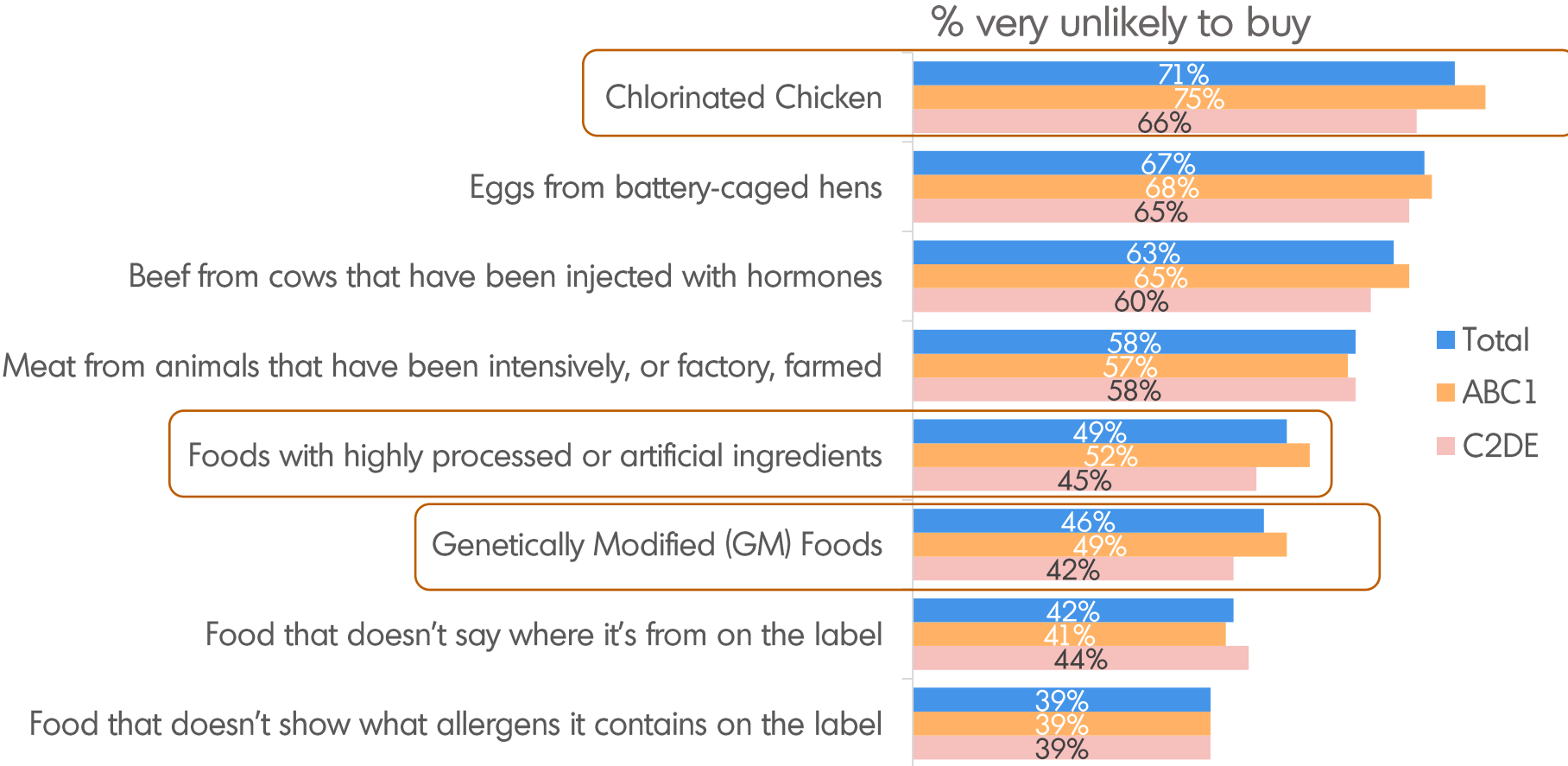
Q1 How likely is it that you would buy the following foods? Base (all respondents): 1122

Q5 After Brexit, If the prices of the following foods were significantly cheaper than those you usually buy how likely would you be to buy them? Base (all respondents): 1122



# Impact of Cheaper Prices on Purchase Intention by SEG

- Analysis by socio-economic group highlights slightly greater levels of acceptability for C2DEs for three food categories, if prices are significantly cheaper



Q5 After Brexit, If the prices of the following foods were significantly cheaper than those you usually buy how likely would you be to buy them? Base (all respondents): 1122; (ABC1) 606, (C2DE) 516



# Food Availability



- Lots of uncertainty about what foods might be impacted in short-term
- Expectation of border issues impacting deliveries
- Sense that availability of some foods might get worse if EU-sourced products drop-off
- But also new trading relationships could replace EU goods lost or/and see new foods appear on shelves
  - but general feeling that this will take time



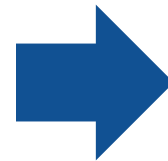


# Concern - Acceptability - Consumer response

- General and mild concern, but no great worry, unless 'less availability' became 'shortages'
- Some changes expected & acceptable in the short term
  - unless a shortage of staple foods
  - or long transportation impacts freshness
- More food purchased could be locally produced – attractive to consumers for a variety of reasons
- Coping strategies also in place to deal with shortages
  - Shop more frequently
  - Substitute for local / seasonal produce
- Younger people as role models – e.g. shifting to vegetarian or vegan – demonstrate how people can change their diet if they need/want to

"We're lucky...we have local produce that can fill the gap"  
Older, C2DE, Remainer

Omnibus  
56% said they were very/quite concerned about less availability of the foods they buy (Q3)



Fairly strong support to buy from domestic sources, and to pay a slightly higher price for it

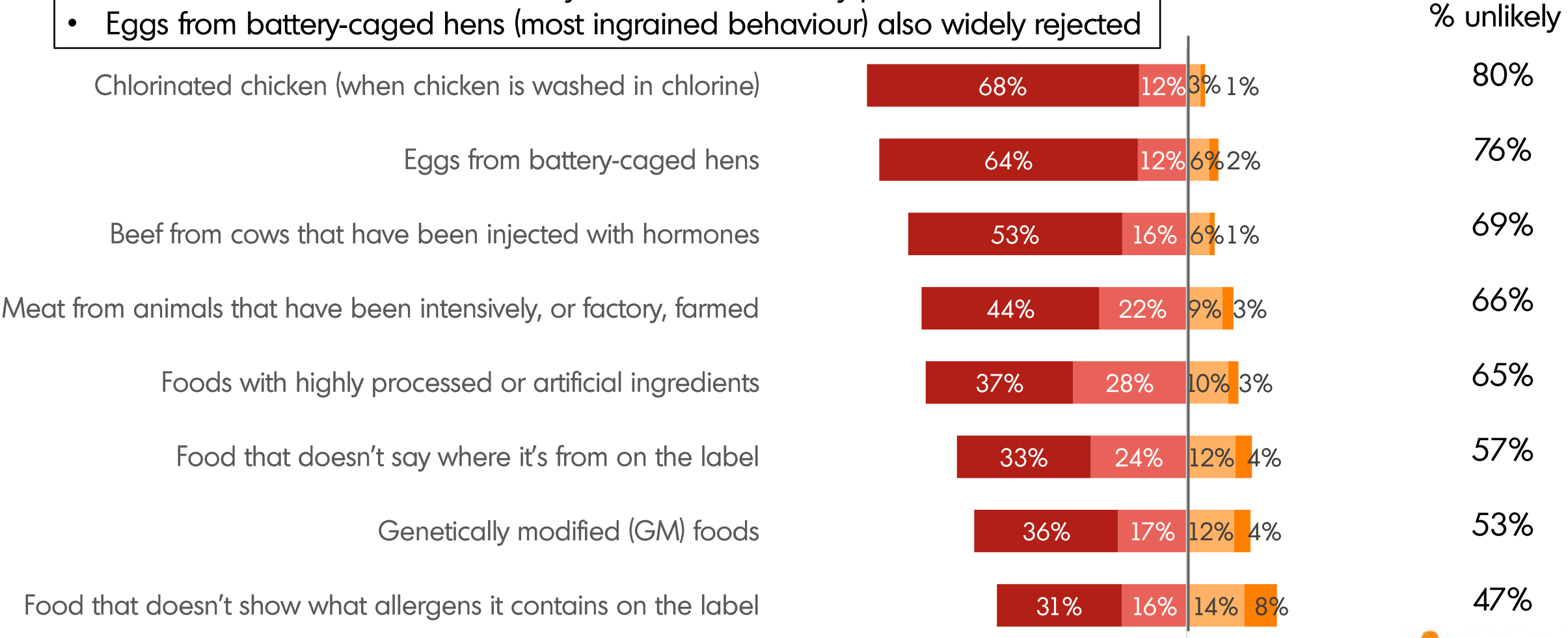
• *Will we still get the more exotic foods that cannot be grown in the UK? And how much will they cost?*

"The shops are not going to be empty" Younger, ABC1, Remainer



# Likelihood of Buying....

- Chlorinated chicken (as most widely known) is least likely purchase
- Eggs from battery-caged hens (most ingrained behaviour) also widely rejected



■ Quite unlikely 
 ■ Very unlikely 
 ■ Quite likely 
 ■ Very likely



Q1 How likely is it that you would buy the following foods? Base (all respondents): 1122



# Would Consumers Buy....?

Least acceptable

- Chlorinated chicken
- Beef from cows injected with hormones
- Food that doesn't say where it's from
- Food that doesn't show allergens
- Eggs from battery-caged hens
- GM foods
- Meat from animals intensively farmed
- Foods with highly processed or artificial ingredients
- Salad etc pre-packed washed in chlorine

Most acceptable

"I've never heard of anyone who has died from eating chlorinated chicken!"  
Older, ABC1, Leaver

## Omnibus

71% said they were very/quite concerned about products like chlorinated chicken & GM foods being sold in Scotland (Q3)

- Tendency for consumers to INITIALLY say NO to ALL
- But quite heavily caveated - on reflection:
  - These things happening already
  - Might buy if price was attractive or buying on a budget
  - Assume will still have choice not to buy / buy alternatives
- Chlorinated chicken viewed as least acceptable in all groups (and omnibus)
  - Widely known due to negative press
  - Actually very little known about what this is / means
- Question how they would know if products were washed with chlorine / injected with hormones / intensively farmed / GM

AGAIN, consumer response would be to turn to local produce or possibly change diet



# Food Safety



- It was not anticipated that the safety of existing foods that continue to be available post-Brexit will be impacted
- It was noted that food safety issues already happen now and again
- New imported foodstuffs could present some challenges to our systems of checks, but...
- Consumers expect our laws and regulations to ensure a high level of food safety



# Concern - Acceptability - Consumer response

- Consumers generally will continue to assume food is safe post-Brexit
  - Some questions around impact of food being imported from further afield on use-by dates
- A fall in food safety would be a result of poorer laws and standards - this is not acceptable
- Some may be more vigilant about ensuring safety – checking use-by dates, following safe cooking practices
  - doing much of this already – just be a bit more vigilant / diligent about it
- More consumers may turn to locally-sourced produce because it is perceived to be 'safe'

- *Why should we be worried about the levels of food safety?*
- *Does the Food Standards agency have enough staff to check?*

"Our parents didn't have all the standards and controls that we have today, and they were fine" Older, C2DE, Leaver

"If you go to a restaurant, you don't know where they get their meat from" Younger, ABC1, Leaver

"If it's not safe, it won't be allowed into the country"  
Older, C2DE, Leaver



# Food Recalls

## Food Recall Alert

Incorrect date labelling



### THIS – Isn't Chicken Sea-Salt & Black Pepper pieces

We are recalling Isn't Chicken Sea-salt & Black Pepper pieces due to an error leading to the incorrect Use By Date being applied. This is showing as the 8<sup>th</sup> of December 2020 instead of 8<sup>th</sup> January 2020.

#### THIS Isn't Chicken Plant-based Sea-Salt & Black Pepper pieces

Pack sizes, batch codes and use by dates affected:

Pack size: 190g

Batch code: 9352

Use by date: 08/12/20



The batch code and use by date can be found on the front of the pack

- Generally not seen to be an aspect of the food environment that will be impacted
- For most consumers, it's not something that they are aware happens very often
- Seen to be more one-off and high profile when it does
  - e.g. Aldi frozen veg recalled
- Things likely to continue as they are, unless impact of Brexit more dramatic than expected



# Concern - Acceptability - Consumer response

- Little or no concern expressed over food recalls – it's not front of mind as a possible Brexit impact
  - And was aspect LEAST concerned about from omnibus data
- It's not anticipated that food recalls will increase dramatically (because consumers have confidence in laws and standards)
- But if this happened, it would demonstrate that our laws and regulations were working – which is what the public would expect
- But it may also shake consumer confidence

## Omnibus

54% said they were very/quite concerned about increased food recalls (Q3)

"If we are told of a problem, then we know to stay clear"  
Younger, C2DE, Remainer

"Recalls shows that the regulations and checks that are in place are working"  
Older, ABC1, Leaver

"Not all the products would be affected, it would just be one particular batch"  
Older, C2DE, Leaver



# Food Poisoning



- Not seen as likely to be a direct impact of Brexit
- An increase in food poisoning from bacteria in food would be a result of lower safety standards
- And consumers are certainly not expecting food laws and standards to be poorer and less effective post-Brexit





# Concern - Acceptability - Consumer response

- If food poisoning rose post-Brexit as a result of lower safety standards, this would be a major concern for consumers
  - And for remain voters leads to broader concerns about NHS
- It would not be acceptable – food safety and standards are perceived to be very important
- Also recognition that some responsibility rests with consumers – e.g. in ensuring healthy cooking practices

“It would be very concerning if it was to happen, but surely it’s not going to happen”  
Older, ABC1, Leaver

“I don’t see how this would change” Older,  
C2DE, Remainer

“If unsafe food floods our shelves and people get food poisoning it would put pressure on the NHS which is already stretched”  
Younger, ABC1, Remainer



# Food Crime



- Widespread sense that importing from new countries and suppliers will present more opportunities for food crime
- Because:
  - things in a state of flux for a time
  - loop-holes as we adjust to new trade deals
  - things being harder to police (for a while)
  - consumers have had poor experience of eating abroad in non-EU countries
- But general expectation that effectiveness of UK laws and safety standards will not be seriously compromised post-Brexit



# Concern - Acceptability - Consumer response

- Expectation that there may be more efforts by shady or criminal elements to mislead the public
- Some concern – sharpened and broadened when drilling down into potential crimes
- But most not deeply worried about this happening
- If widespread and sustained, it would not be acceptable because it would indicate our controls were deficient
- If consumers sense food crime is on the rise, they'll be more vigilant and buy more from known and trusted food retail outlets (including locally produced)

## Omnibus

61% said they were very/quite concerned about an increase in food crime (Q3)

- *Would a reduction in food quality and standards not open the door to more food crime?*
- *How will food crime be controlled and closely monitored?*
- *Will enough resources be made available to police things properly?*

"The Irish horsemeat scandal...the Food Standards Agency was on it"  
Older, ABC1, Leaver

"There will always be people who try to take advantage of situations...so yes, there probably will be more crime" Younger, ABC1, Remainer



# Animal Welfare



- An area that many expect to be impacted
- But in what way impacted? – no consensus
- Majority feel impact possibly negative
- Because → need to develop new trade deals could lead to meat from animals that have not been treated humanely imported
- Minority of the view that UK can, and will, set higher standards



# Concern - Acceptability - Consumer response

- An aspect that is front-of-mind – people are aware, concerned and emotionally engaged
- Some voices already unhappy with the status quo (conditions in some slaughterhouses)
- Unacceptable should animal welfare deteriorate
- Public would expect/demand intervention by relevant authorities to stop sale of meat from unscrupulous suppliers

## Omnibus

70% said they were very/quite concerned about a reduction in animal welfare standards (Q3)

- *What will be the impact on animal welfare if we have to produce more home-grown meat for ourselves? If we need to quickly accelerate breeding, if we are pressed for space, what then?*

"It depends on who sets the standards. We should, so things could improve" Older, ABC1, Leaver

"I saw this thing with cattle in America on acres and acres of concrete...I hate to think of cattle being treated like that" Older, C2DE, Remainer



# Food Labelling



- Views mixed on likely impact, but not generally expected to be negative
- Some don't expect the info they see on food packaging to change post-Brexit
  - they expect good standards will be maintained
- Others anticipate some change – though not for the worse – as a result of stricter labelling in response to new products coming in from countries the UK strikes new trade deals with
  - but, again, this anticipates the UK's system of regulation and controls will not greatly change and will ensure that new food imports adhere to current standards



# Concern - Acceptability - Consumer response

- **Concern if things changed**
- **Very concerned if food did not say where it's from – this would not be acceptable**
- **And those with allergies very concerned about any changes to allergen labelling**
- **Broad support to retain what is currently covered by food labelling**
  - strong appetite for all current information on food labels to be maintained
- **Lower likelihood of buying imported foods with less info on their labels**
  - In fact, with other changes in food environment, scrutiny of labels is likely to increase
- **Foods with a lot of 'unfamiliar' ingredients may confuse and 'put-off'**
  - But less of an issue than other aspects of labelling
- **Lack of info unlikely to be offset by cheaper product offers**

- *What information will be on food labels?*
- *Why would it change?*
- *Will allergens continue to be clearly labelled?*

"We've become used to the information that is now on food packaging, like the traffic light system, we don't want that to be lost" Younger, C2DE, Remainer

"Less information would be a big step back. It took time to get used to it" Older, ABC1, Leaver

"I'm coeliac so I need to know what allergens are in foods. I'd really struggle without that information on labels" Younger, ABC1, Remainer



**Less info + lower cost = consumers doubling down on their suspicion and choosing alternatives or doing without**



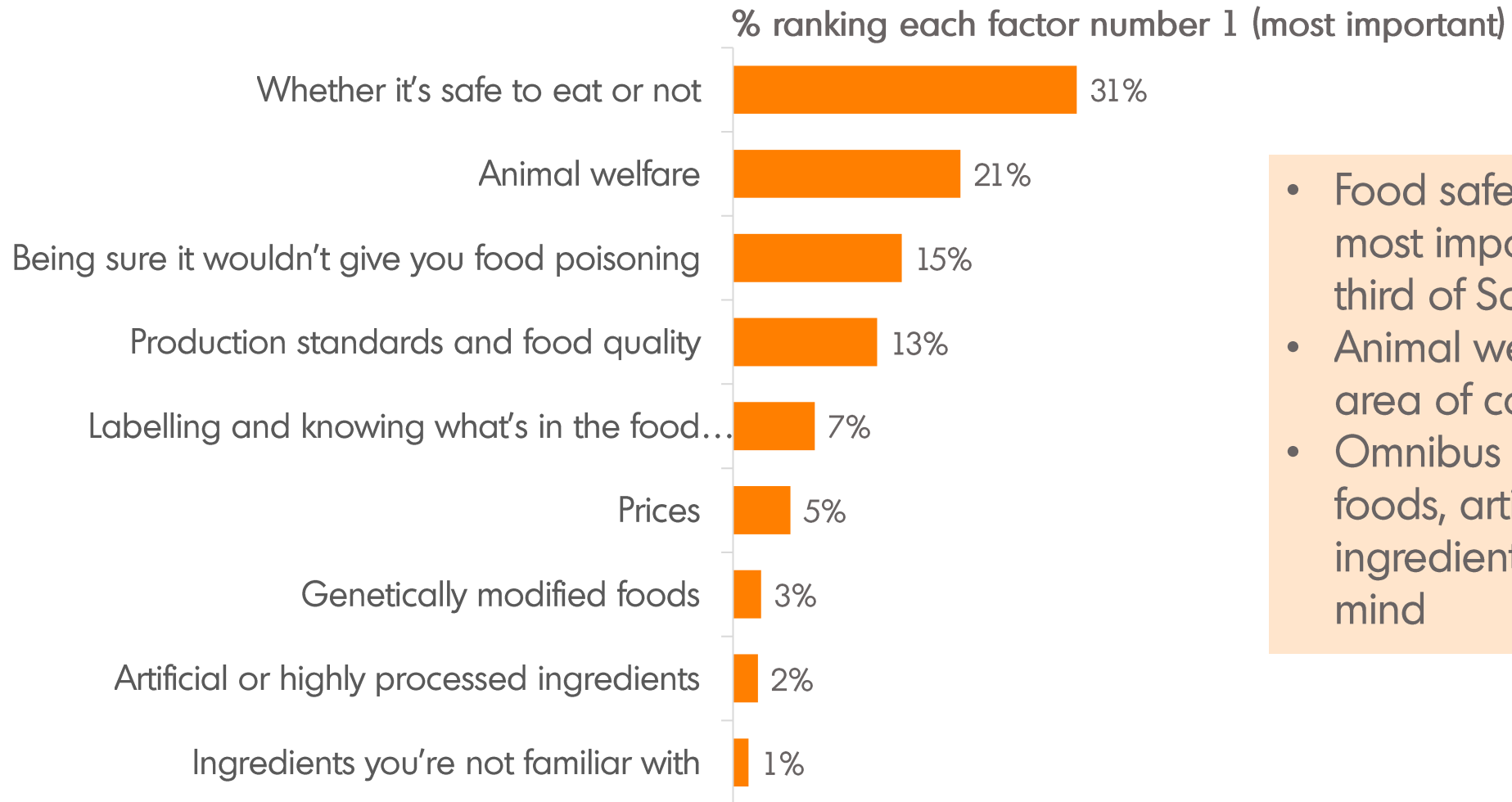
# Summary overview

What aspects are causing more or less concern to consumers?





# Important Factors When Buying Food Imported from outside EU



- Food safety ranked as the most important factor by a third of Scots
- Animal welfare also a key area of concern
- Omnibus data suggests GM foods, artificial or different ingredients are less front of mind



# Hierarchy of concern

LOW  
CONCERN

Food Prices  
Food Availability

People are aware but not unduly worried. They expect change and have accepted it. But they would be much more concerned if change was dramatic

Food Labelling  
Food Law

While anticipating some impact, consumers expect that UK will maintain much of what it has – e.g. laws to ensure new products coming to the UK market carry good quality info, and more generally maintain high food safety and standards

Food Poisoning  
Food Crime  
Food Recalls

None of this is front-of-mind, largely because consumers have confidence in the UK's future food laws & food standards: they expect these will continue to do the job.

Food Safety

Consumers assume food will be safe post-Brexit, but safety would become a concern should it be felt that food laws and food standards are slipping

Animal Welfare  
Food Standards

Both are of high concern, but not necessarily a cause of current disquiet. High food standards is seen to underpin many other things. Animal welfare is an emotive topic and an area where standards could slip if not properly regulated

HIGH  
CONCERN



Much hinges on the expectation that the current UK food standards will be maintained, with laws in place to ensure this is the case.



# Future Information Needs & Role for FSS



# Key Question Areas

- At the end of the group discussions, participants were asked to note any questions they had about the impact of Brexit on the food environment, which covered a range of topics:

If / how food standards will be maintained – what laws will be retained?

Who will be responsible for policing food standards & safety / how much influence does FSS have / how will the same standards be upheld in all parts of UK?

Trade deals – what are they / how long take to implement / what will happen in the meantime / how will UK farmers be affected?

General info – what types of foods are currently imported / environmental impact of non-EU imports?

Likely cost increases – how much / what products are likely to be affected?

Availability / shortages – likelihood / what products / can UK producers cover shortfall?

How can consumers be sure food is safe to eat – identifying chlorine wash / added hormones etc?

How to interpret changes in labelling – trusting use-by dates / allergens / unfamiliar ingredients?

- Strong interest in identifying a source of information about these issues that is....
  - Trustworthy
  - Factual / impartial
  - Easy to access and easy to understand
  - Helpful in enabling consumers to navigate change and make informed choices post Brexit.



# Potential Role for FSS

- Widespread recognition of 'food standards agency' in Scotland
- Uncertainty around detail of FSS's current role relating to each aspect of food environment
- Lack of knowledge about impartiality from and influence on government

**Food Standards Scotland**



- Opportunity for FSS to play a key (enhanced) role in 3 areas:

- Playing a key role in setting & maintaining food standards
- Policing / ensuring adherence

- Helping consumers understand
- Go-to information source
- Unbiased, factual information
- Written in plain English
- e.g. FAQs, guide to interpreting unfamiliar labels, what to do if...

- Champion of the consumer voice, ensuring food standards are not used as leverage in trade deals

"They [FSS] need to make sure our standards and laws don't change for the worse" Older, C2DE, Leaver



"If they [FSS] could tell us what might change and how that will impact our weekly shop, that would be really helpful"  
Younger, ABC1, Remainer

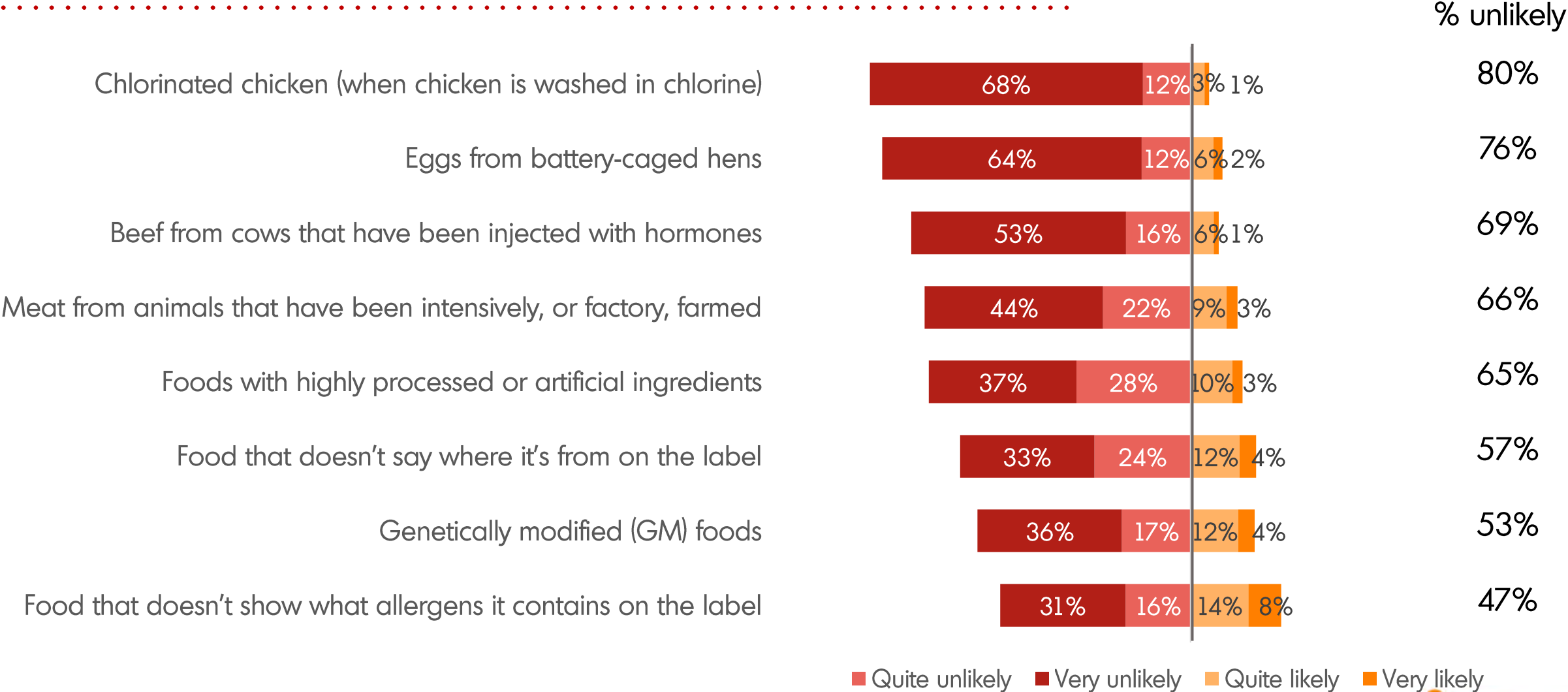


# Appendix

## Full Omnibus Results



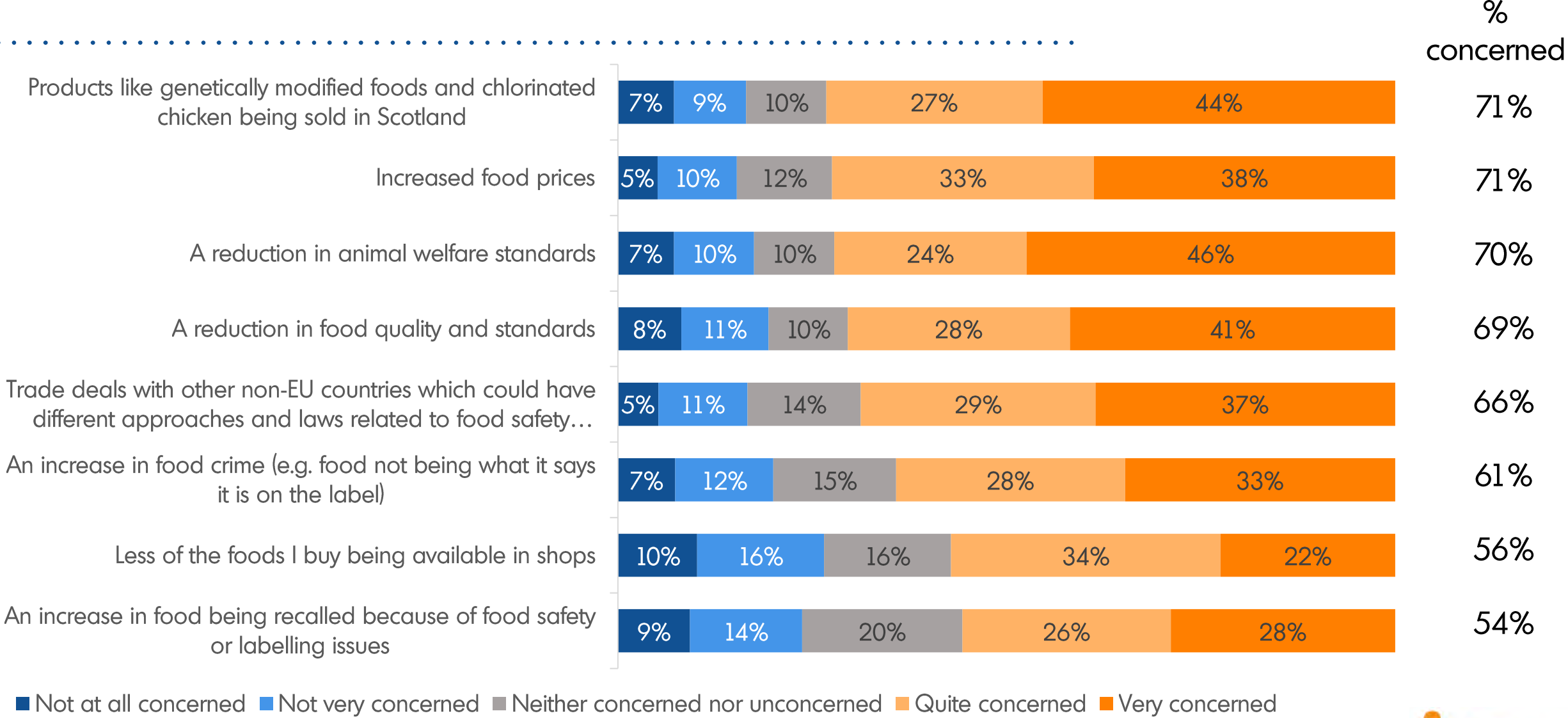
# Likelihood of buying....





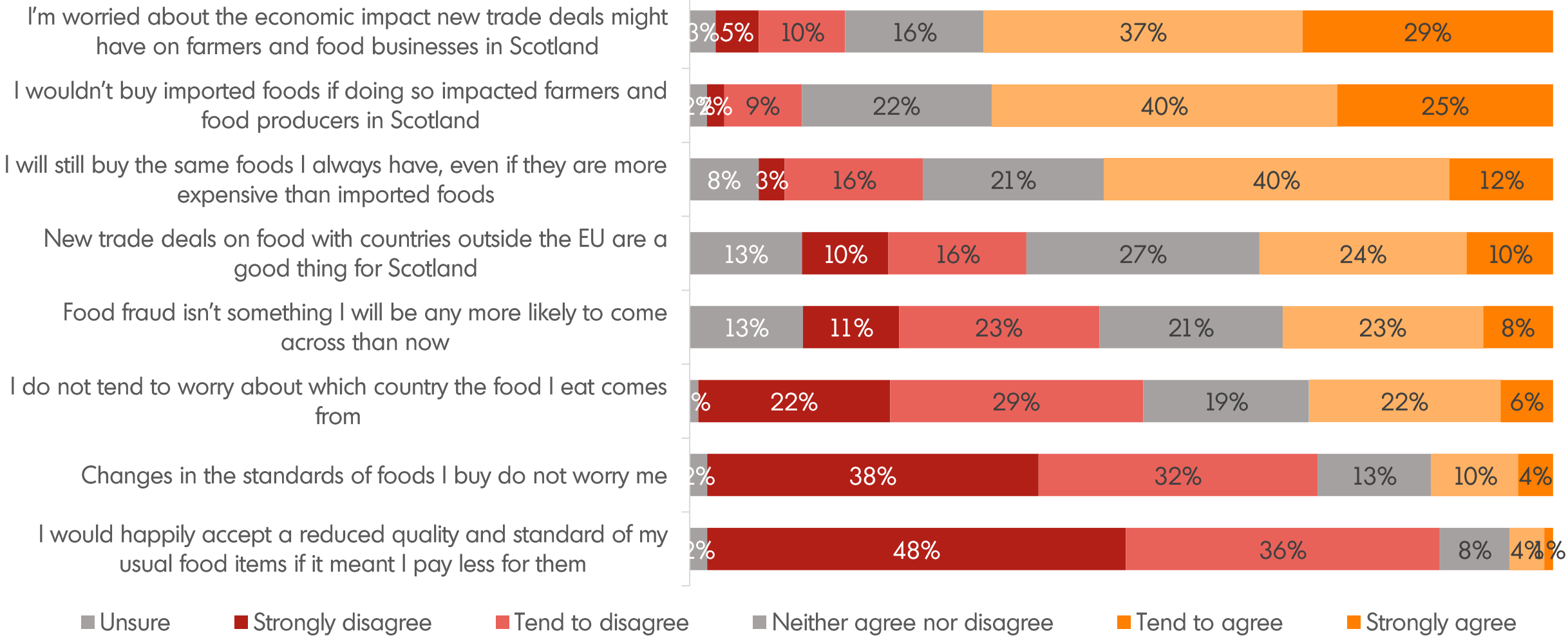


# Concern about Food Issues after Brexit



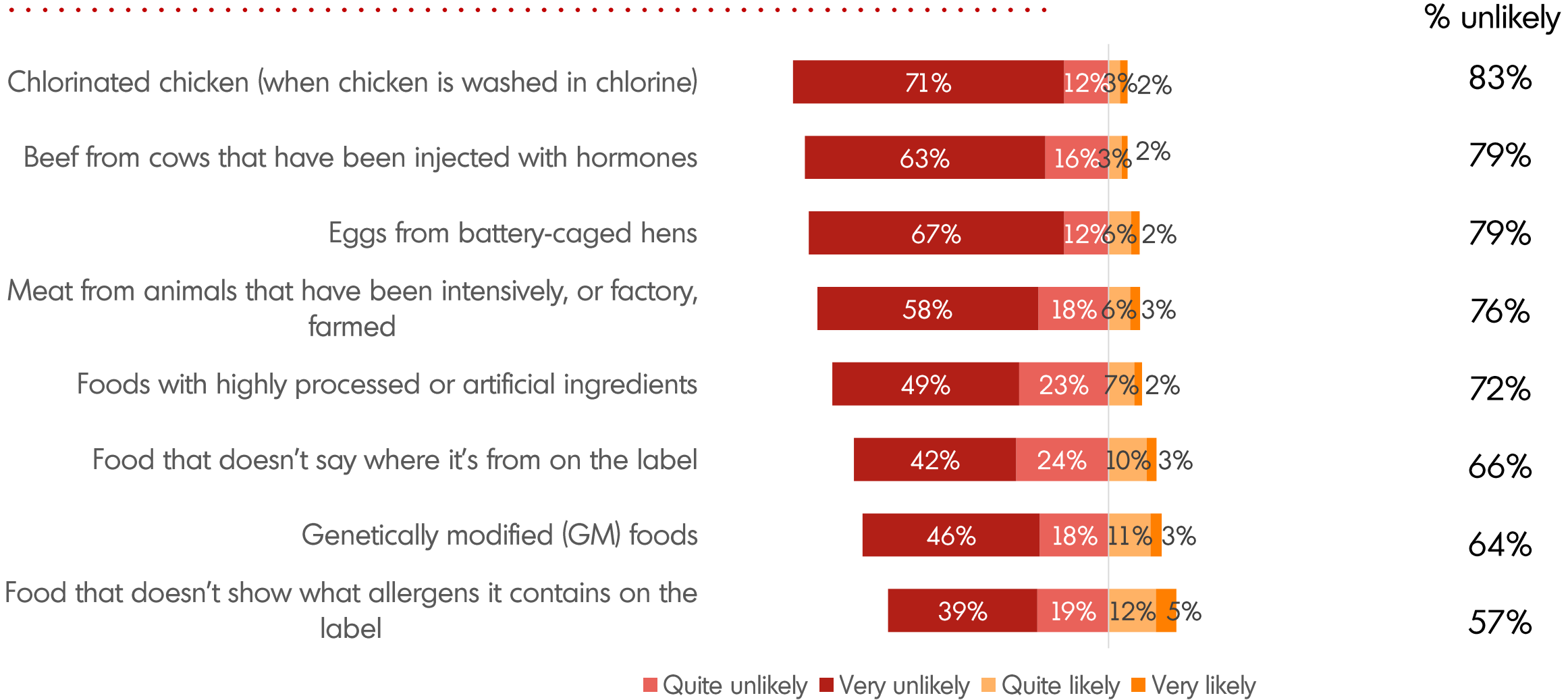


# Post Brexit Views



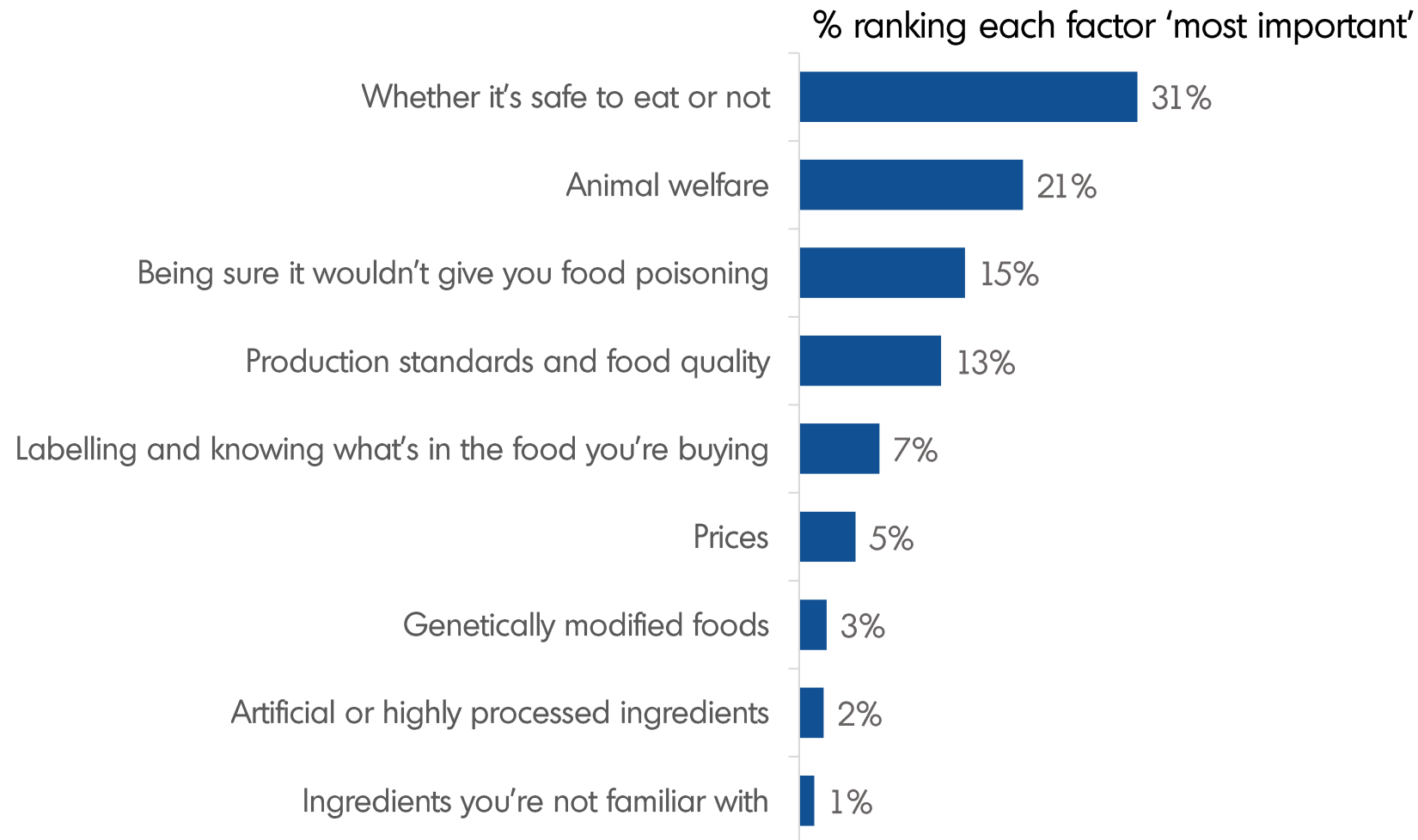


# Likelihood of Purchase if Prices Significantly Cheaper





# Important Factors When Buying Food Imported from outside EU



Q6 How important might the following be to you when buying food imported from countries outside the EU after Brexit?  
Please rank in order of importance where 1 is most important and 9 is least important? Base (all respondents): 1122