Food in Scotland Consumer Tracking Survey Wave 18

July 2024

Contents

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Background, method and sample

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 was 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. JRS Research conducted Waves 7-16 and Union Data conducted wave 17. Progressive carried out the research in the latest wave of reporting.
- Wave 16 was conducted in July 2023, Wave 17 was conducted in December 2023.
- Significant* increases or decreases between Waves 17 and 18 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 **1,027** Scottish adults

7-minute questionnaire length

24th -27th June 2024

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

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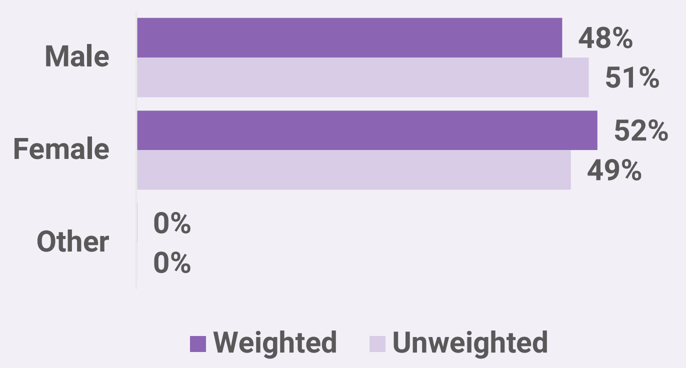
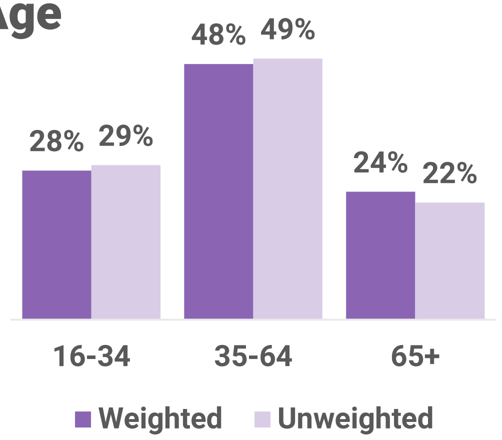
Sample is representative of the Scottish population – data was weighted on key demographics to match the Scottish population.

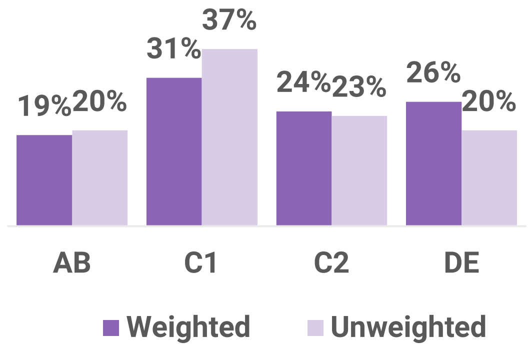
Gender



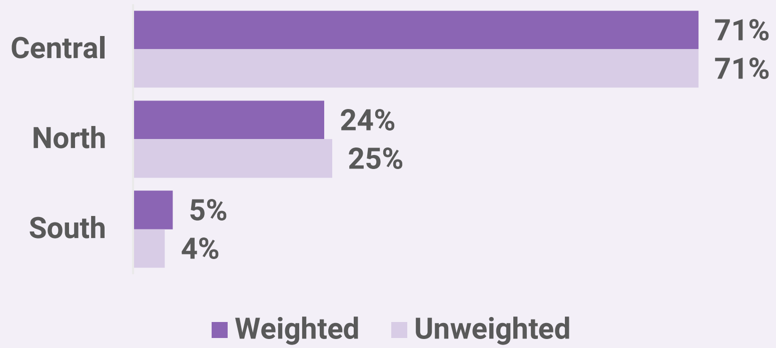
Age



Social Grade



Location



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Base: All respondents 1,027

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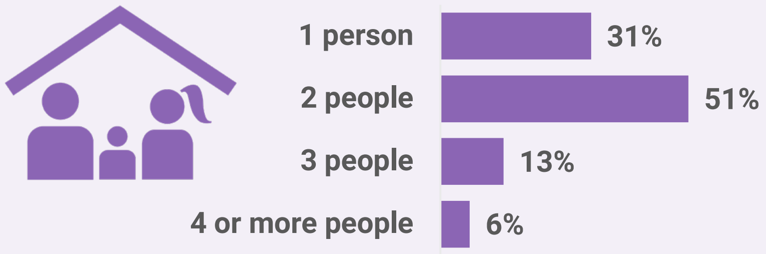
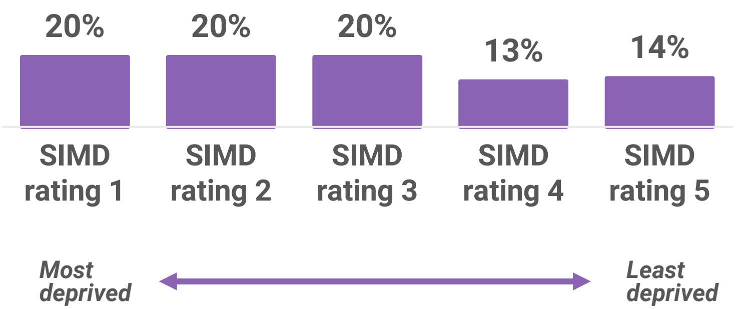
Sample Profile – Weighted

Household composition



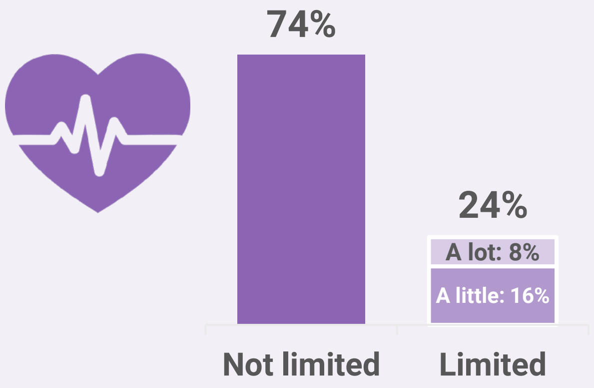
Includes 26% of households with children

SIMD quintile*

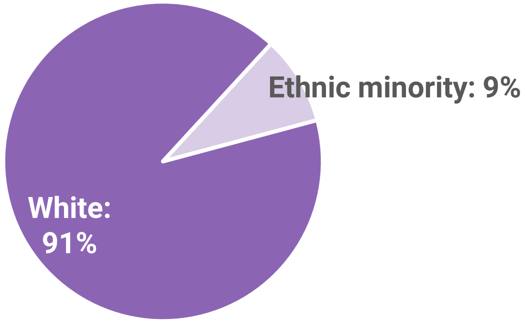


13% did not provide a postcode or the postcode was unclassified

Limiting Health Issues**



Ethnic Group



*SIMD is a relative measure of deprivation, which splits Scotland into 6,976 small areas, called 'data zones', with roughly equal populations. Each data zone is ranked based on a range of indicators of deprivation including income, employment, education, health, access to services, crime & housing.

Households with a SIMD 1 rating above are located in areas classed as being among the 20% most deprived in Scotland.

Households with a SIMD 5 rating are located in areas classed as being among the 20% least deprived in Scotland.

SIMD calculations require full postcode data therefore where respondents opted not to provide their postcode it has not been possible to calculate.

Working status**

Base: All respondents 1,027

**'Other' and 'Prefer not to say' responses not shown

Key Findings

Awareness and Trust	Issues of Concern for Consumers	Activities	Affordability
Awareness of FSS continues to be very high with the majority of consumers claiming to have heard of it. Levels of Awareness and Trust are significantly higher this wave compared to July 2023.	Food prices and food poverty continue to be top of mind for consumers and this is particularly true for those living in areas categorised as most deprived according to SIMD.	Very little has changed in terms of activities compared to last wave. Consumers are clearly still concerned about saving money where they can, and choice of food purchases play a big part in that.	The most deprived versus least deprived SIMD quintiles, those with children, ethnic minorities and women are more likely to experience food poverty indicators such as food affordability, cutting food amount and skipping meals.

Key Findings

Healthy Eating

Consumers need support to make healthy eating choices. More could be done regarding promotion and educating about healthy eating. Promotions and packaging of unhealthy foods needs to be controlled to support consumers in making healthy choices.

Labelling

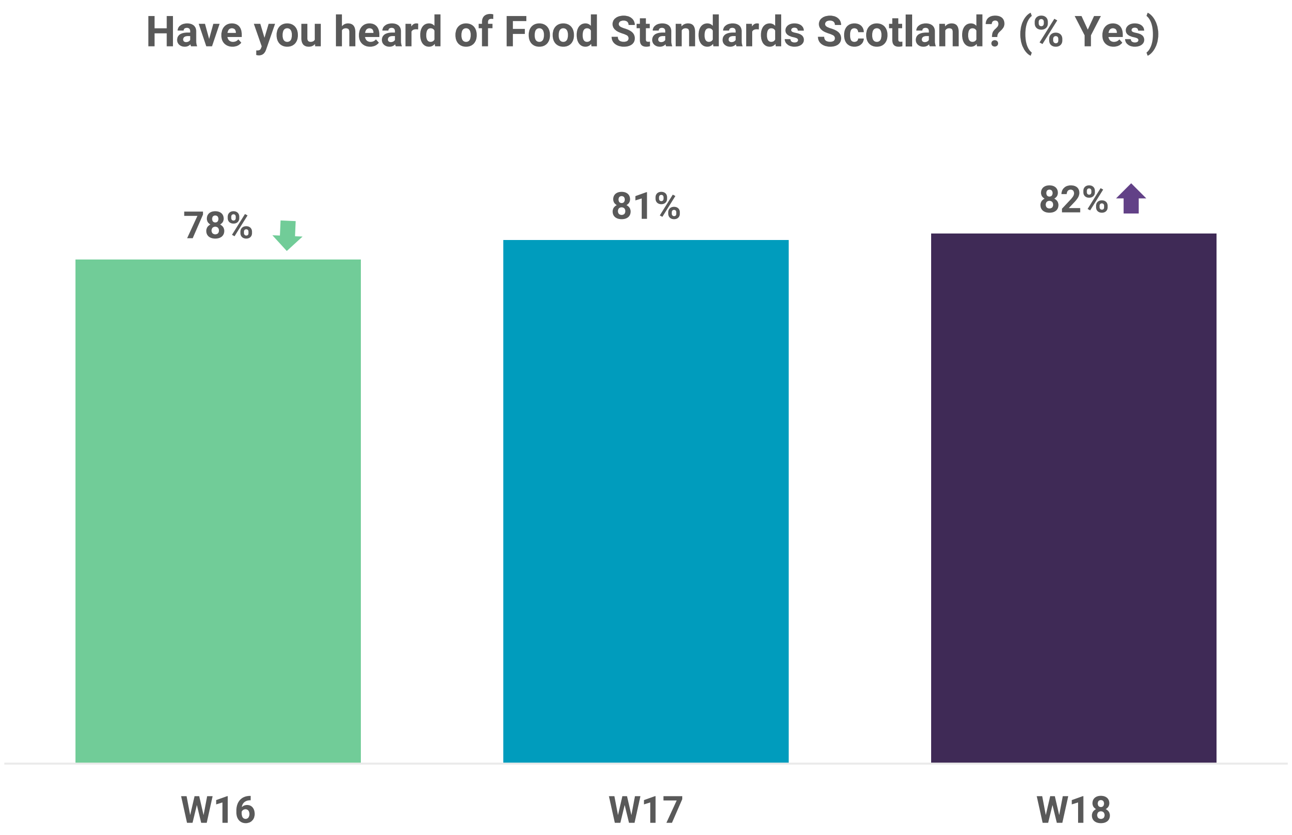
There is a lot of confusion over labelling. The terms *Vegan, Plant Based and Free From* are widely misunderstood and confused with each other and build false confidence that products will, for those with allergies, be safe to consume.

Food Security

Confidence in the safety of the UK food supply chain has fallen. While concern for availability has lessened, over a quarter of consumers expressed concern which was higher in most deprived SIMD quintile but significantly lower in more affluent groups.

Awareness and trust

The majority were aware of Food Standards Scotland and Awareness was significantly higher this wave compared to July 2023 W16.

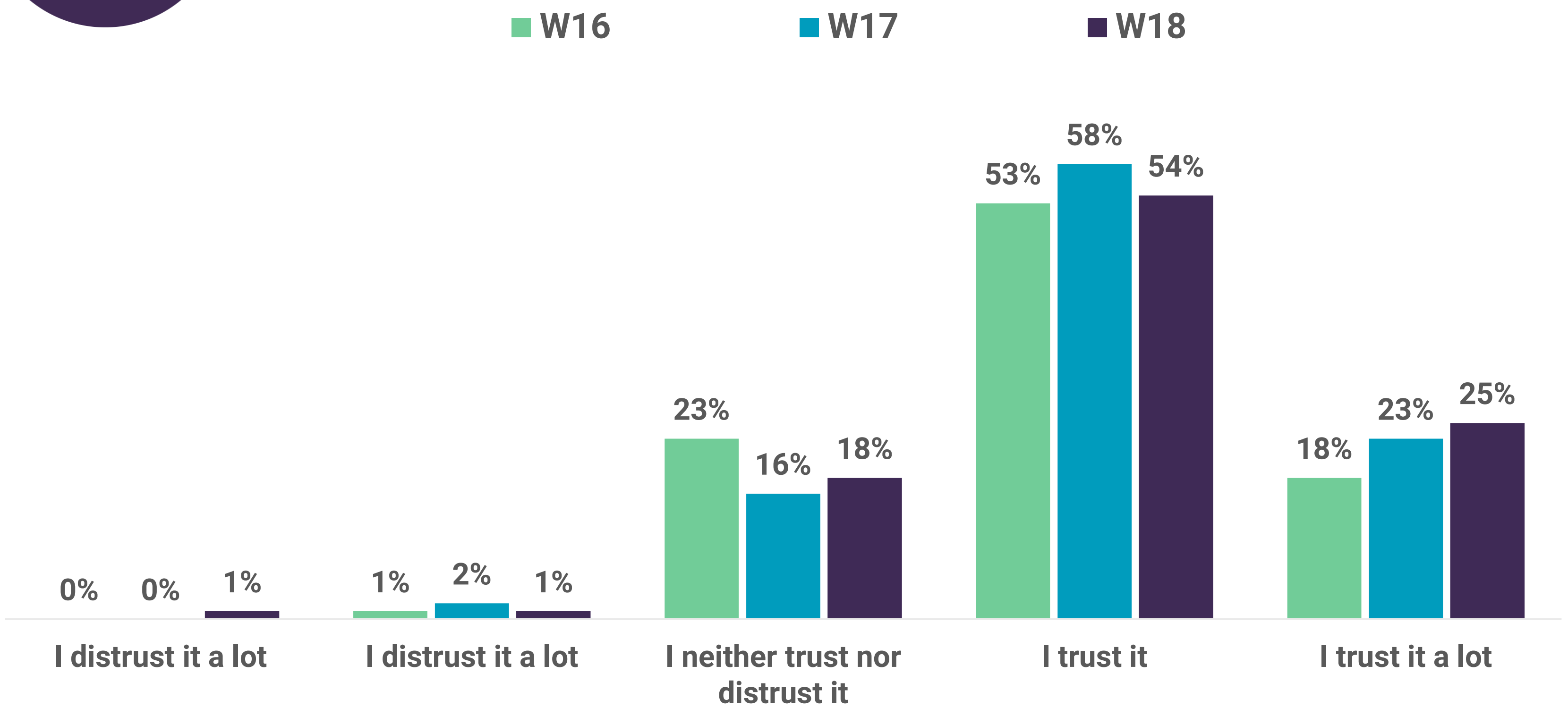


- This wave *lower awareness* was recorded among younger respondents (77% of 16-34 year olds were aware of FSS compared to 84% among those 35 and over), and Ethnic Minority respondents (74% - though this has increased from 65% in W17).
- Awareness was *higher* among respondents who felt more informed (85% among those who reported having clear information on eating a healthy balanced diet) and/or those who were more interested in having access to nutritional information (83% of those who felt calorie and/or nutritional information should be available on request when eating out).

Q1. Have you heard of Food Standards Scotland? Base (all) W16 1017, W17: 1039, W18: 1027

Trust in FSS was high and overall Trust was on a par with last wave and significantly higher this wave compared to July 2023 (79% vs 71%).

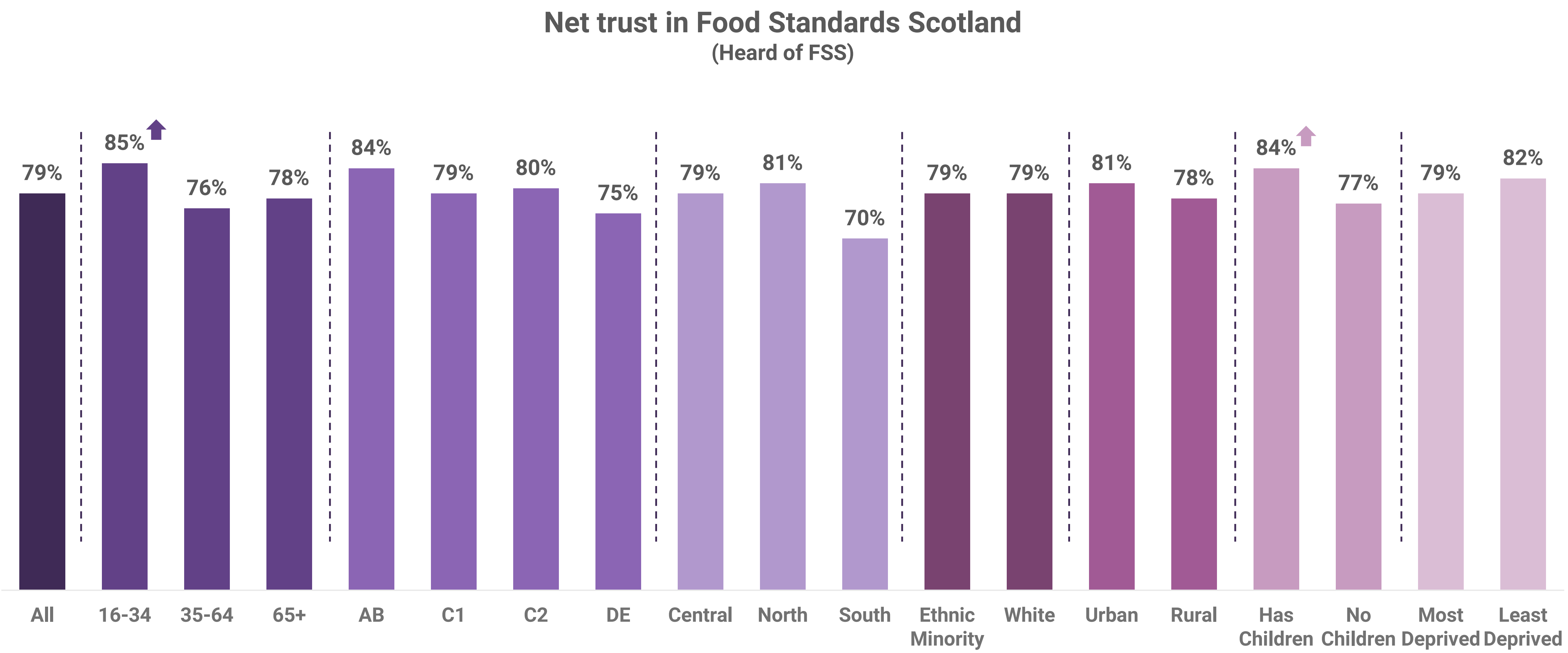
How much do you trust or distrust Food Standards Scotland to do its job? (Heard of FSS)



- As with Awareness, Trust in FSS was higher among those who reported having clear information on eating a healthy balanced diet (83%) and those who felt calorie/nutritional information should be available on request when eating out (81%); and was also higher among those who said they did not find it difficult to eat a healthy balanced diet.

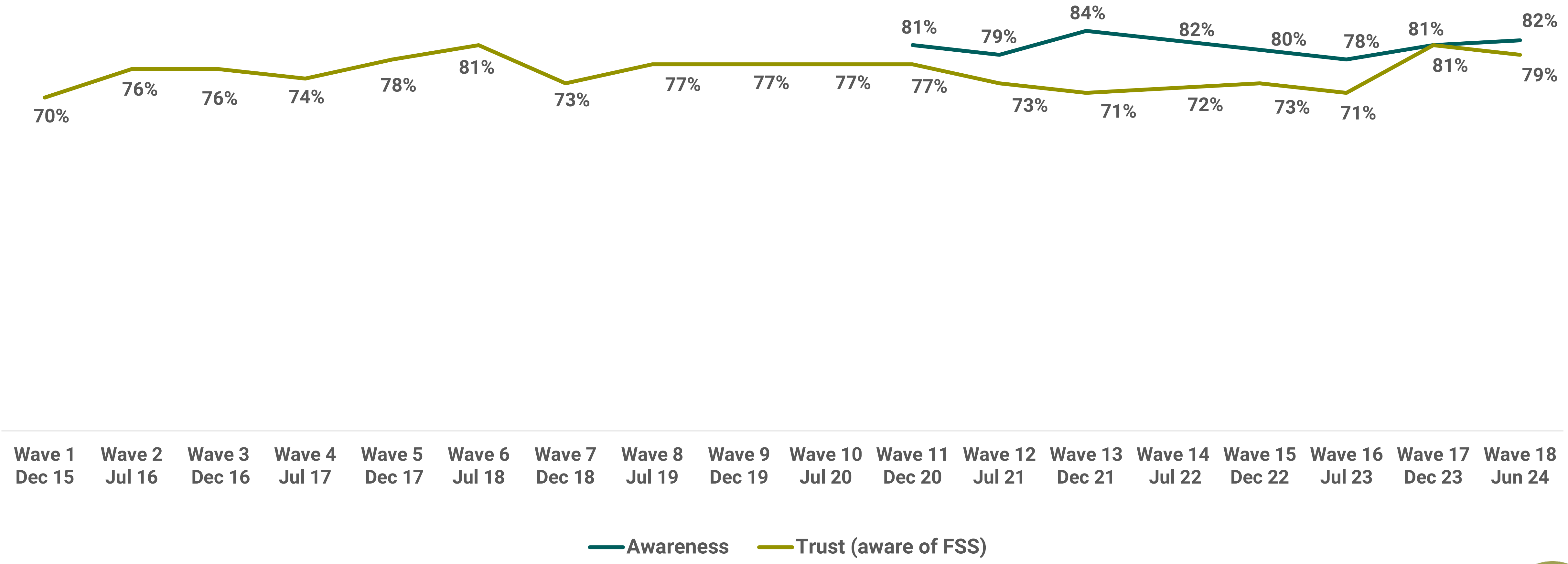
Q2. How much do you trust or distrust Food Standards Scotland to do its job? Base (those aware of FSS) W16 790,W17: 837, W18: 840
Don't know not shown (1%)

High levels of Trust were experienced across all demographic groups with few significant differences. Those aged 16 to 34 had higher levels of Trust than other age groups. Those with children in the household had higher levels of Trust than those with no children.



Q2. How much do you trust or distrust Food Standards Scotland to do its job? Base (those aware of FSS): 840

Changes in Awareness and Trust this wave compared to last are not significant. The declining trend in Awareness from Dec 2021 to July 2023 has halted and results are on the incline once more.



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Q1. Have you heard of Food Standards Scotland? Base (all) W18: 1,027,

Q2. How much do you trust or distrust Food Standards Scotland to do its job? Base (those aware of FSS) W18: 840

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Awareness and Trust – Summary

- The majority were aware of FSS and similar levels were seen in wave 18 compared to 19. There was a significant increase in awareness in June 2024 (W18) compared to July 2023 (W16).
- This wave *lower awareness* was recorded among younger respondents (77% of 16-34 year olds were aware of FSS compared to 84% among those 35 and over), and Ethnic Minority respondents (74% - though this has increased from 65% in W17).
- Awareness was *higher* among respondents who felt more informed (85% among those who reported having clear information on eating a healthy balanced diet) and/or those who were more interested in having access to nutritional information (83% of those who felt calorie and/or nutritional information should be available on request when eating out).
- The majority of those who were aware of FSS placed Trust in it.
- High levels of trust were experienced across all demographic groups with few significant differences. Those aged 16 to 34 had higher levels of trust than other age groups. Those with children in the household had higher levels of trust than those with no children.

Awareness of FSS continues to be very high with the majority of consumers claiming to have heard of it. Levels of Awareness and Trust are significantly higher this wave compared to July 2023.

Issues of concern for consumers

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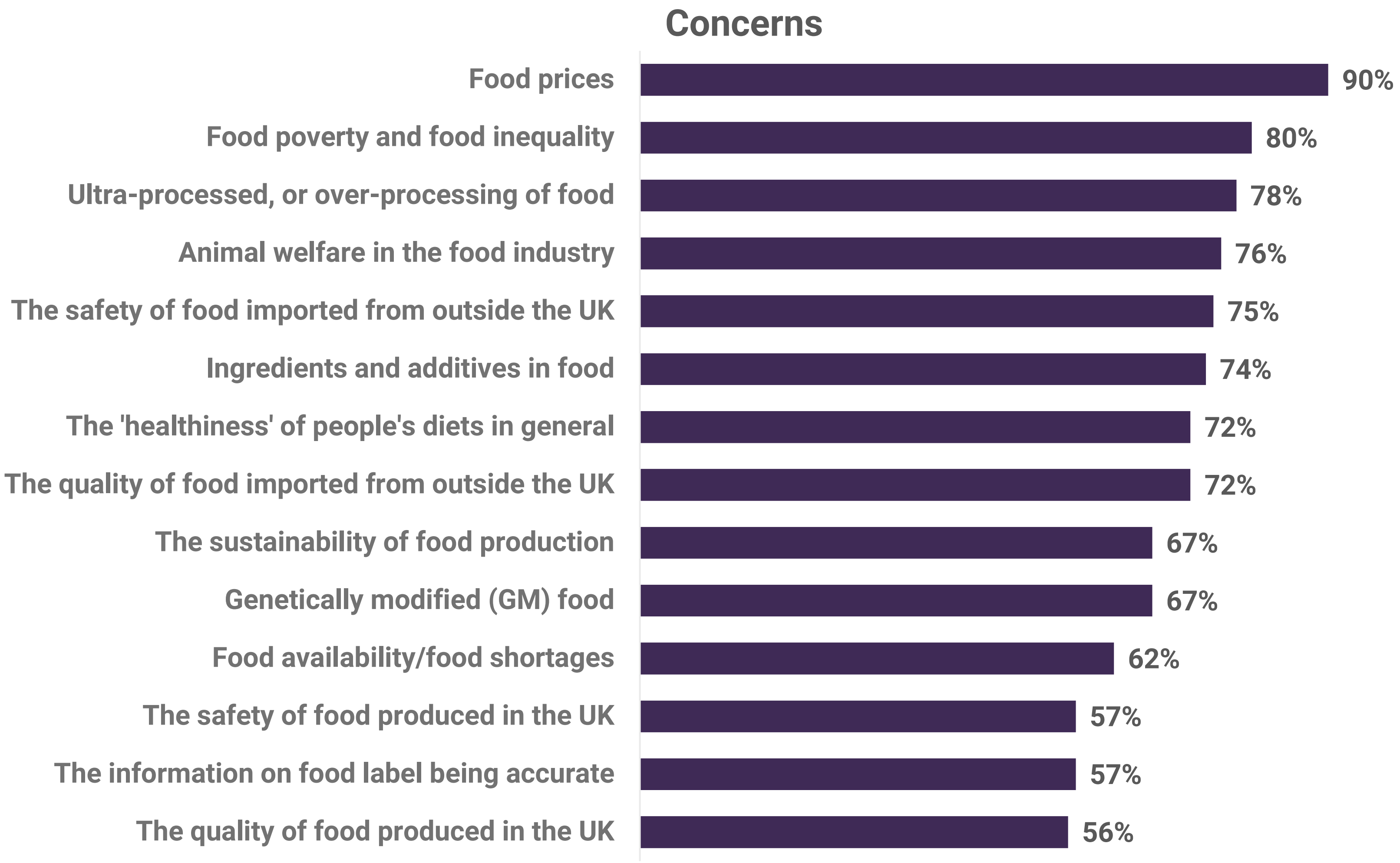
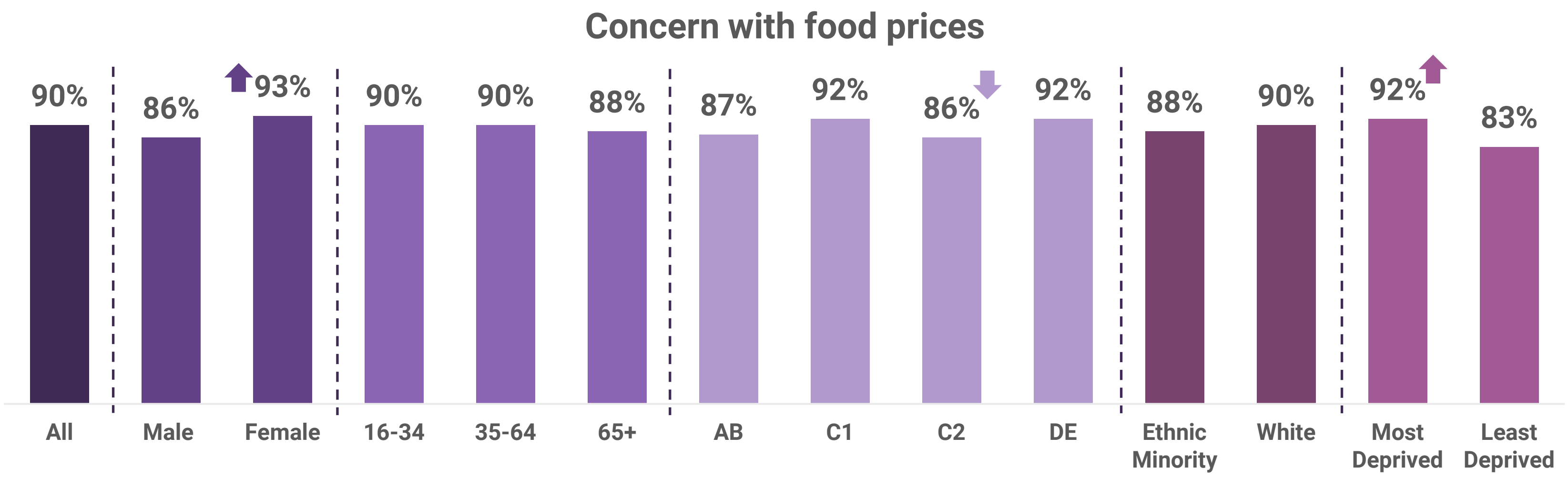
Key points of concern this wave were in line with last wave. Food prices, food poverty and food inequality continue to be the two issues of most concern.

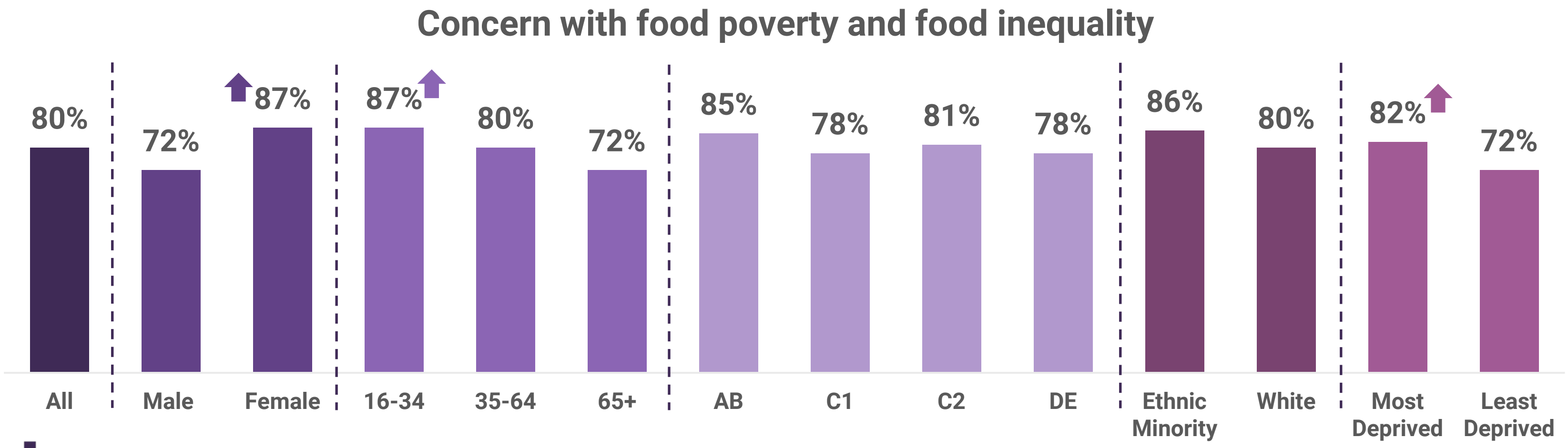


- As with last wave, the highest levels of concern were recorded in relation to food prices and food poverty.
- Concern was high among those who said they'd been worried about being able to afford food in the last year, and those who were worried there might not be enough food available for their household in the next month.
- Concern about food prices was lower than in W17 however (93% W17 vs 90% W18).
- Concern about the sustainability of food was also lower this wave (72% in W17).
- Concern was **higher** around animal welfare (69% W17), ingredients and additives in food (68% W17), GM food (61% W17), food availability (57% W17), and the quality of food produced in the UK (50% W17).

Q3. 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 (all): 1,027

Food prices and food poverty are issues of concern across all demographic groups.

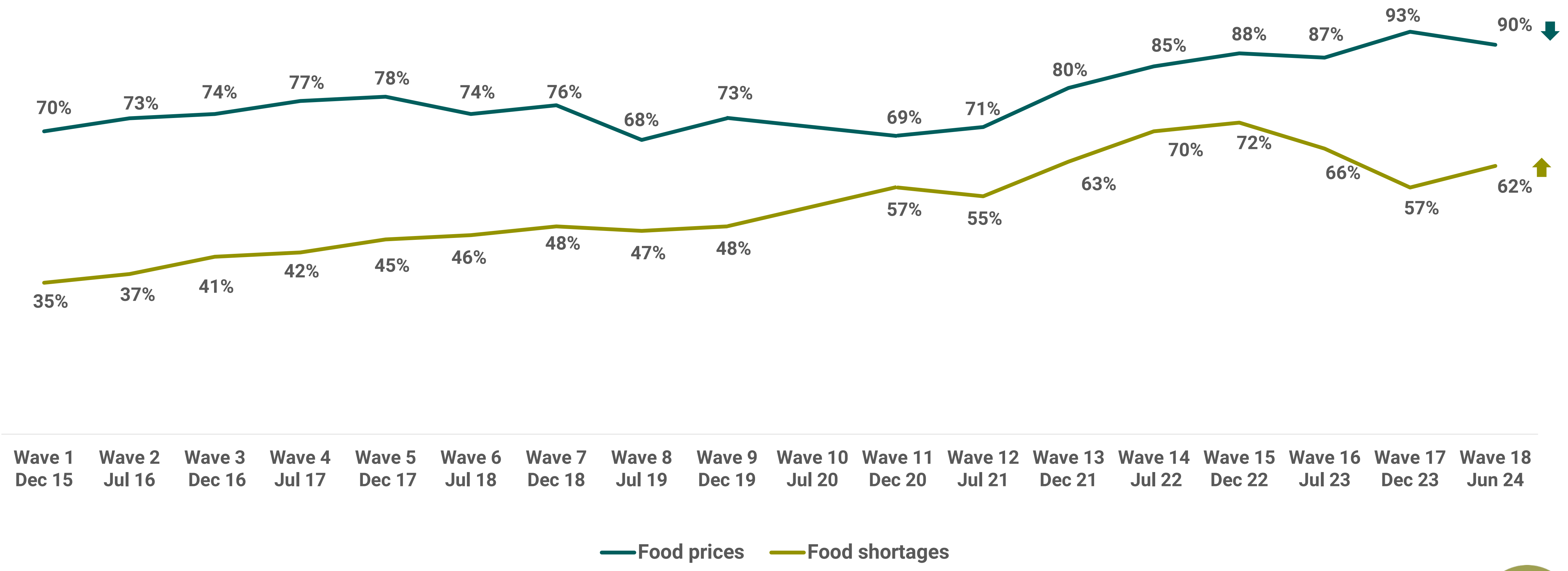




- Concern with food prices are quite similar across different demographics
- Concern about food prices is higher for women than men and higher for those living in the most compared to least deprived SIMD quintile
- Food prices are of lower concern to C2 compared to other SEG groups
- Concern about food poverty is higher for women than men, higher in the 16 to 34 age group compared to other age groups and higher for those living in the most compared to least deprived SIMD quintile

Q3. 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 (all): 1,027

Levels of concern about food prices have fallen to 90% down from 93% in Wave 17. Concern about food shortages has started to rise – increasing from 57% in Wave 17 to 62% this wave.



Q3. 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 (all) W18: 1,027
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 90% of consumers while food poverty and inequality are a concern for 80% of consumers. This is in line with the previous wave.
- Animal welfare has risen in concern this wave (W18 76% ~W17 69%) as has ingredients and additives in food (W18 74% ~W17 68%). Safety of imported food was placed in a higher position of concern this wave.
- The sustainability of food production was less of a concern this wave compared to last (W18 67% ~W17 72%)
- As with last wave the safety and quality of UK food and information on food labels being accurate are the three lowest areas of concern.
- Levels of concern about food prices have fallen to 90% down from 93% in Wave 17.
- Concern about food availability has started to rise – increasing from 57% in Wave 17 to 62% this wave.

Food prices and food poverty continue to be top of mind for consumers and this is particularly true for those living in areas categorised as most deprived according to SIMD

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Activities

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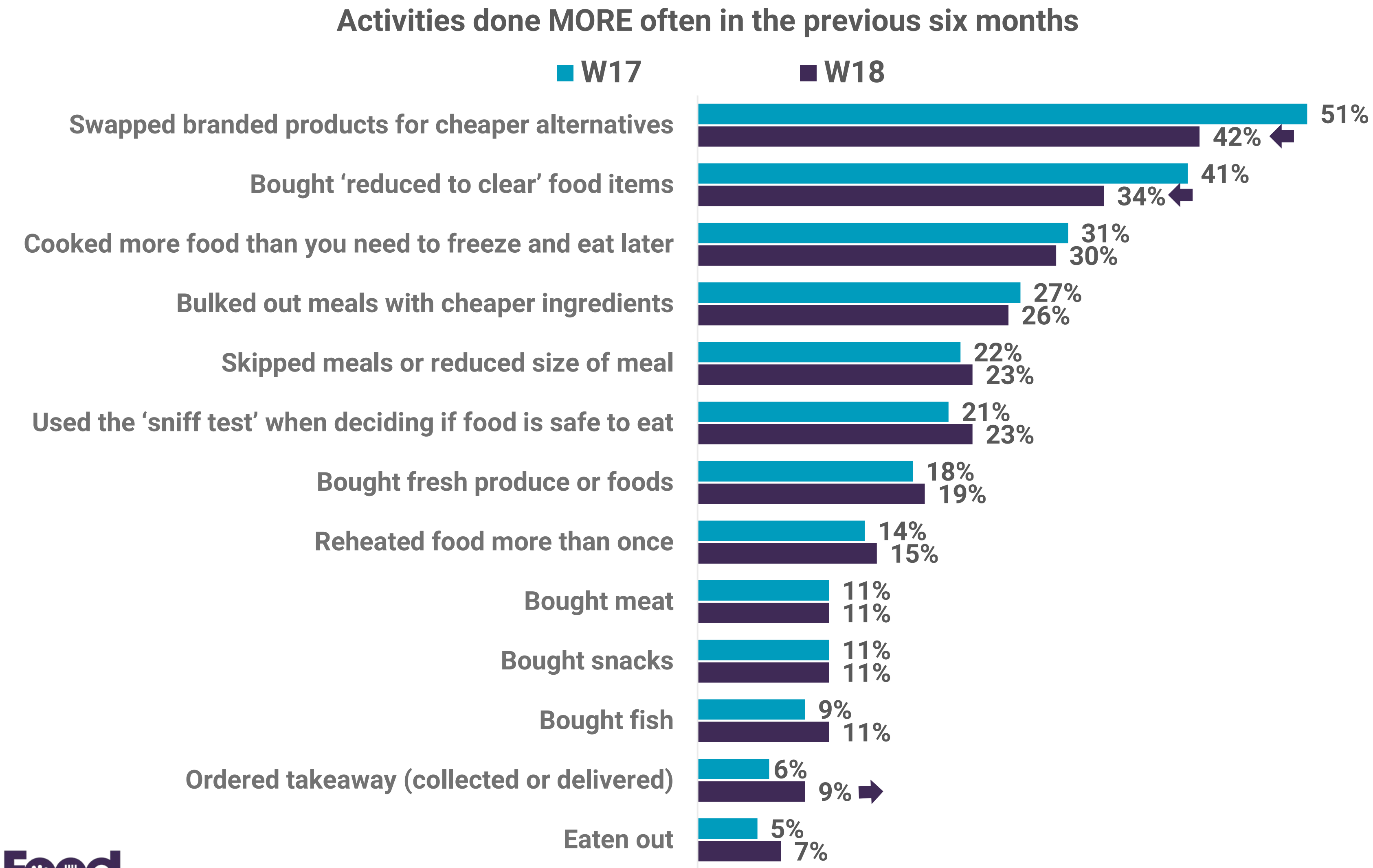
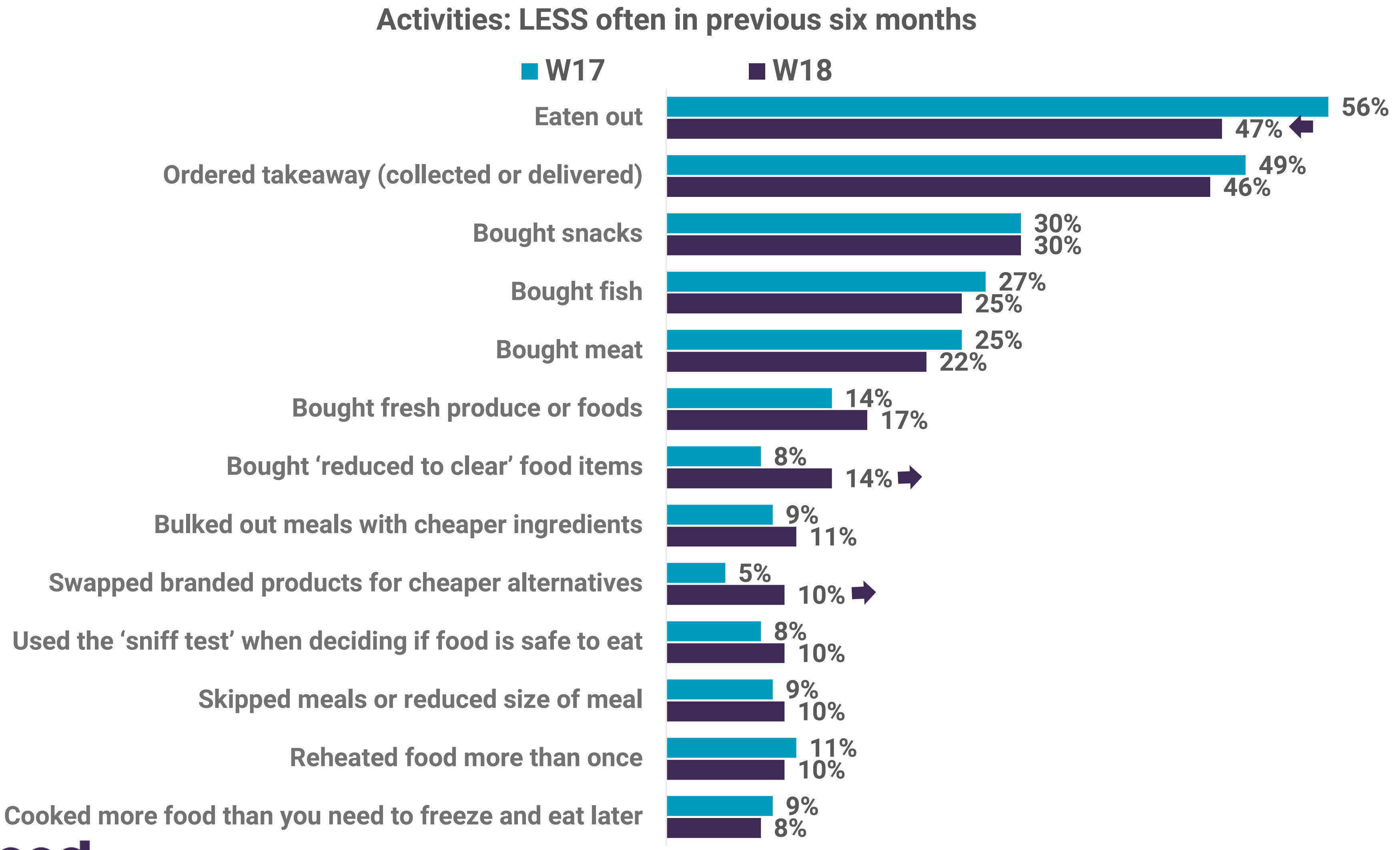
While a minority said they had eaten out and ordered takeaway the most likely money saving activities were swapping branded products for cheaper alternatives and buying reduced to clear food items.



- The priority of actions taken to save money fall in much the same order as they did in Wave 17.
- There was an overall decrease in the number of consumers who swapped branded products and fewer who bought reduced to clear food items.
- Just 9% of consumers ordered takeaway more often this wave which is an increase on last wave, and only 7% said they had eaten out more often to save money.

Q4. Over the past 6 months, in order to save money, have you done any of the following more often? Base (all) W17: 1,039, W18: 1,027
Q5. Still thinking about saving money over the past 6 months, have you bought or done any of the following more or less often? Base (all): W17: 1,039, W18: 1,027

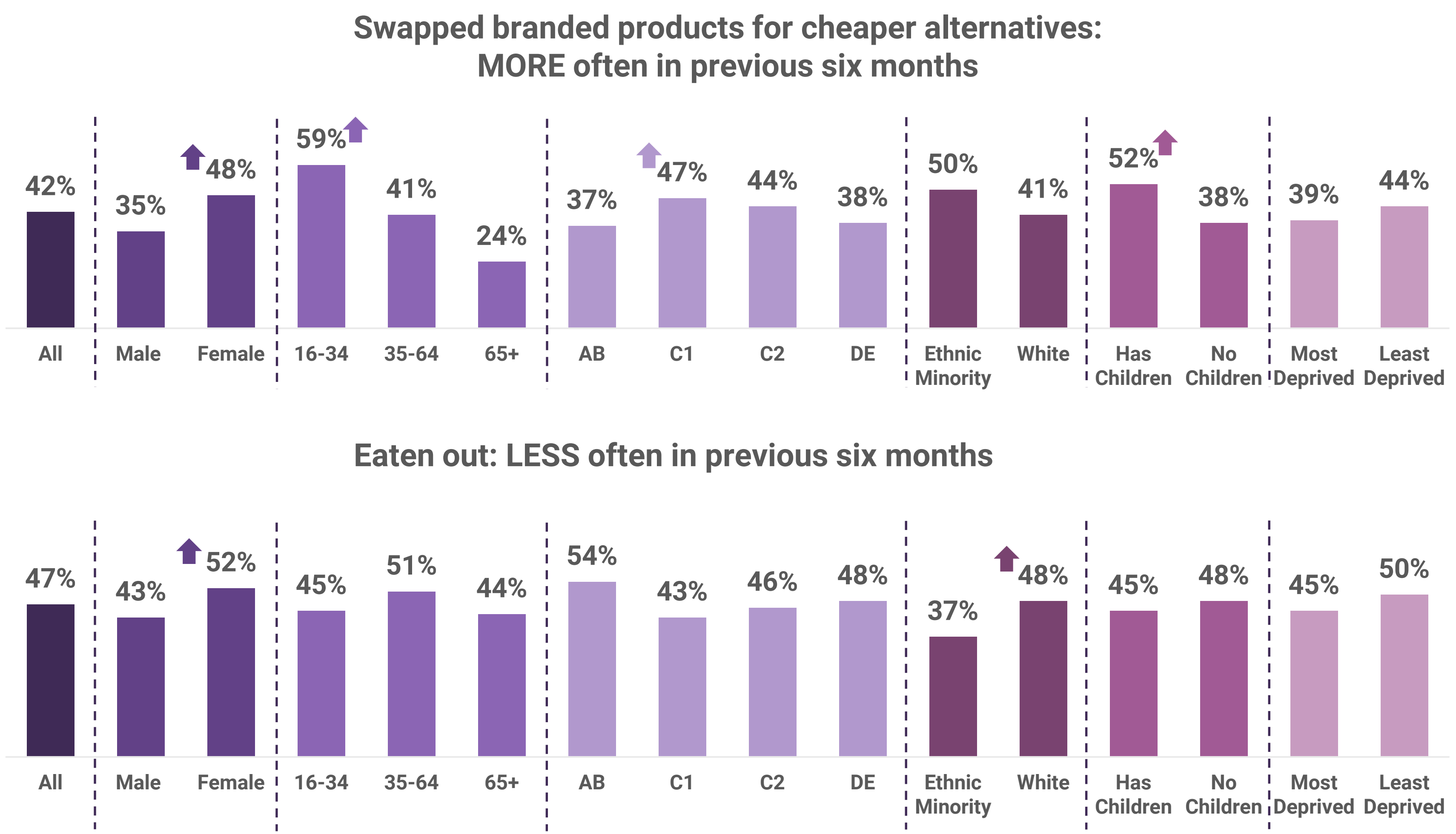
The most likely activities to be done less often were eating out and ordering takeaways, buying snacks, fish, meat and fresh produce.



- The majority had eaten out and ordered takeaway less often to save money. Fewer consumers said they had eaten out less this wave.
- A greater number of consumers said they had bought reduced to clear food items and swapped branded products less often.

Q4. Over the past 6 months, in order to save money, have you done any of the following more often? Base (all) W17: 1,039, W18: 1,027
Q5. Still thinking about saving money over the past 6 months, have you bought or done any of the following more or less often? Base (all): W17: 1,039, W18: 1,027

Those who were working were significantly more likely than those not working to have carried out the activities more often. The same is true for those who had worried about affording food compared to those who had not worried.



- More women than men claimed to have swapped branded products and eaten out less.
- Those with children were more likely than those without to have swapped branded products and had eaten out less often.
- SEG C1 was more likely than AB and DE to have swapped branded products.

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Q4. Over the past 6 months, in order to save money, have you done any of the following more often? Base (all): 1,027
Q5. Still thinking about saving money over the past 6 months, have you bought or done any of the following more or less often? Base (all): 1,027

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Activities – Summary

- The cost of living continues to impact on consumer's behaviour with a variety of actions in place to save money.
- Key activities that consumers did more of included:
  - Swapping branded products for cheaper alternatives
  - Bought reduced to clear food items
  - Cooked more food, frozen and eat later
  - Bulked out meals with cheaper ingredients
  - Skipped or reduced size of meals
- Key activities that consumers did less of included:
  - Eating out
  - Ordered takeaway
  - Bought snacks, meat fish, fresh produce

Very little has changed in terms of activities compared to last wave. Consumers are clearly still concerned about saving money where they can, and choice of food purchases play a big part in that.

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Affordability

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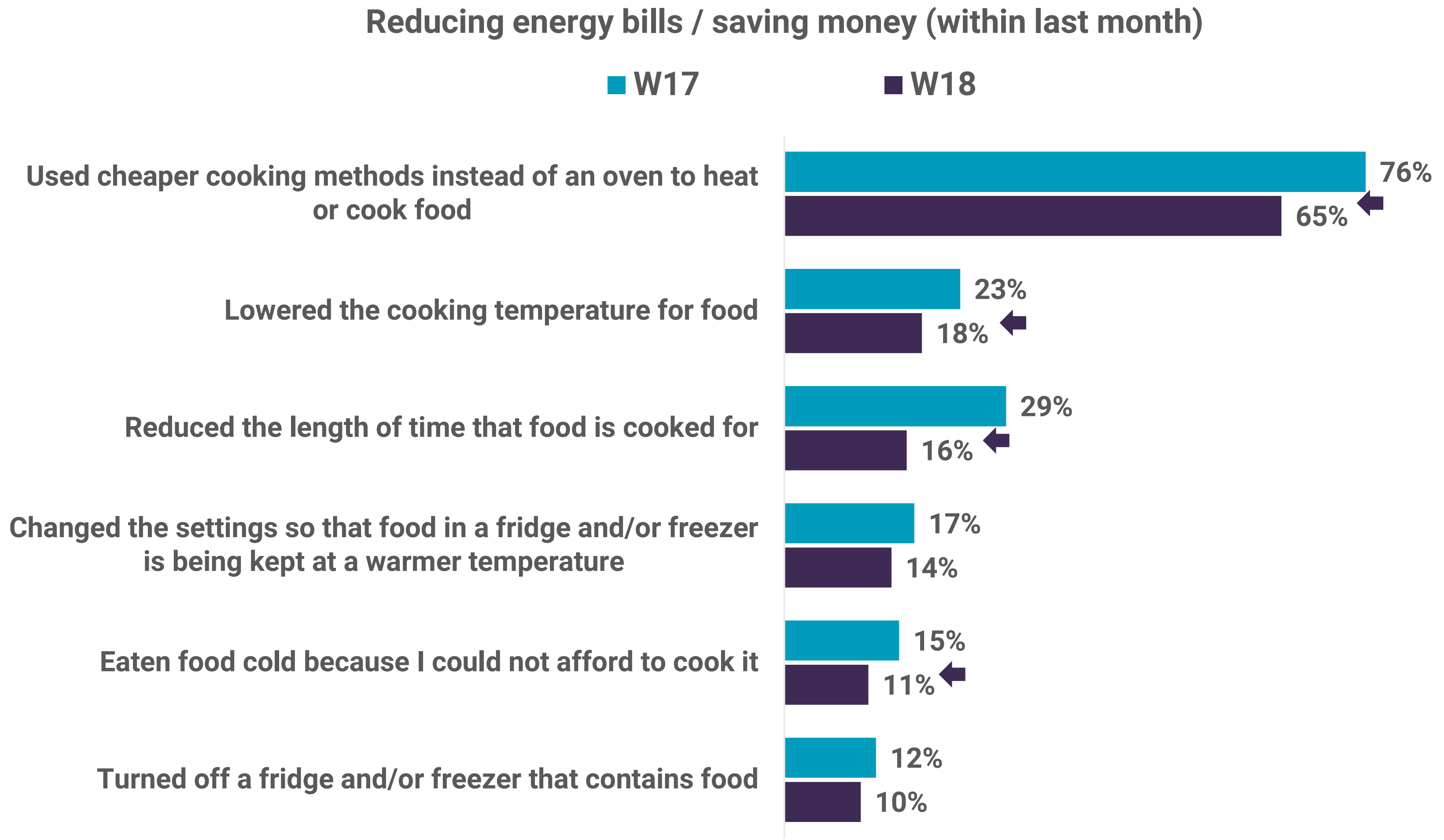
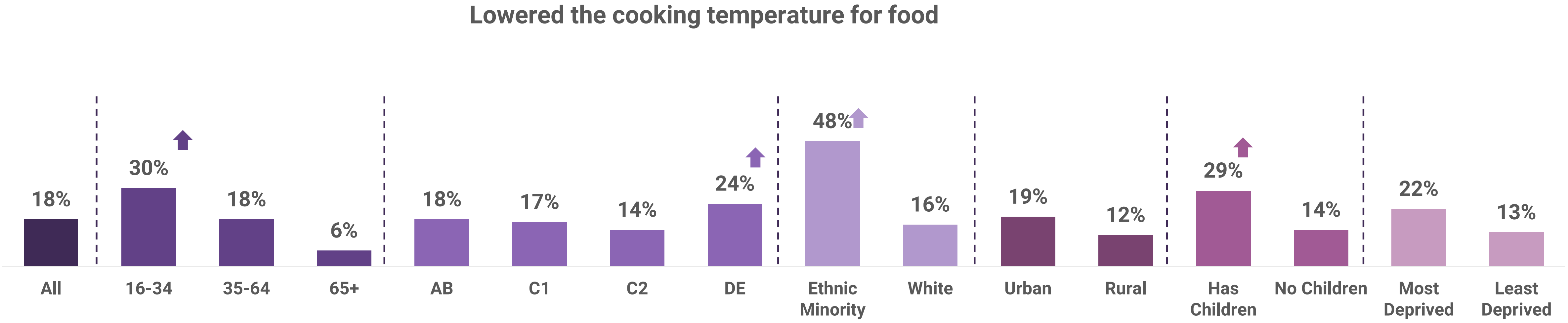
This wave saw a reduction across many of the money saving actions designed to reduce energy bills. This could reflect the summer month in which the fieldwork took place.

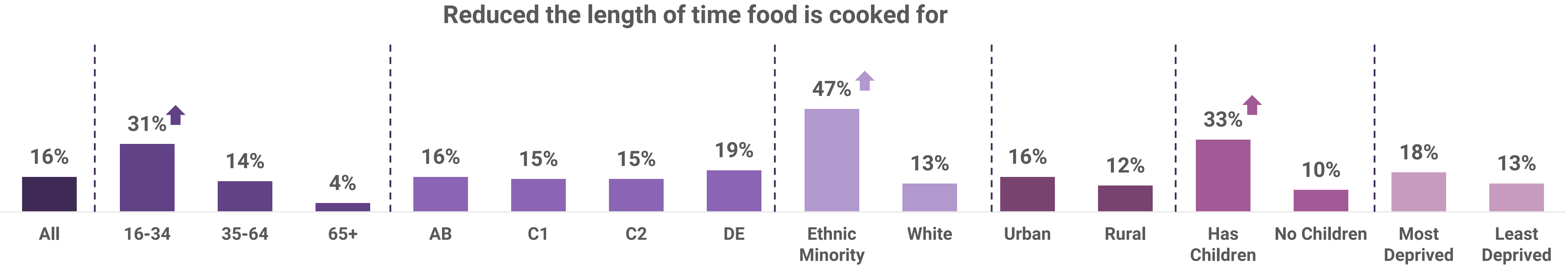


- Two thirds of consumers had saved on energy bills by using cheaper cooking methods. This is a significant reduction on the last wave.
- Nearly one in five (18%) had lowered the cooking temperature for food and one in 6 (16%) had reduced the length of time food was cooked for.
- Respondents who said they'd been worried about being able to afford food in the last year, those who received help with their shopping and those who said they were worried about there not being enough food for them/their household to buy in the next month were more likely than others to have done each of the listed actions to reduce their energy bills.

Q6. In the last month, which, if any, of the following have you done to reduce your energy bills and save money? Base (all) W17: 1,039, W18: 1,027

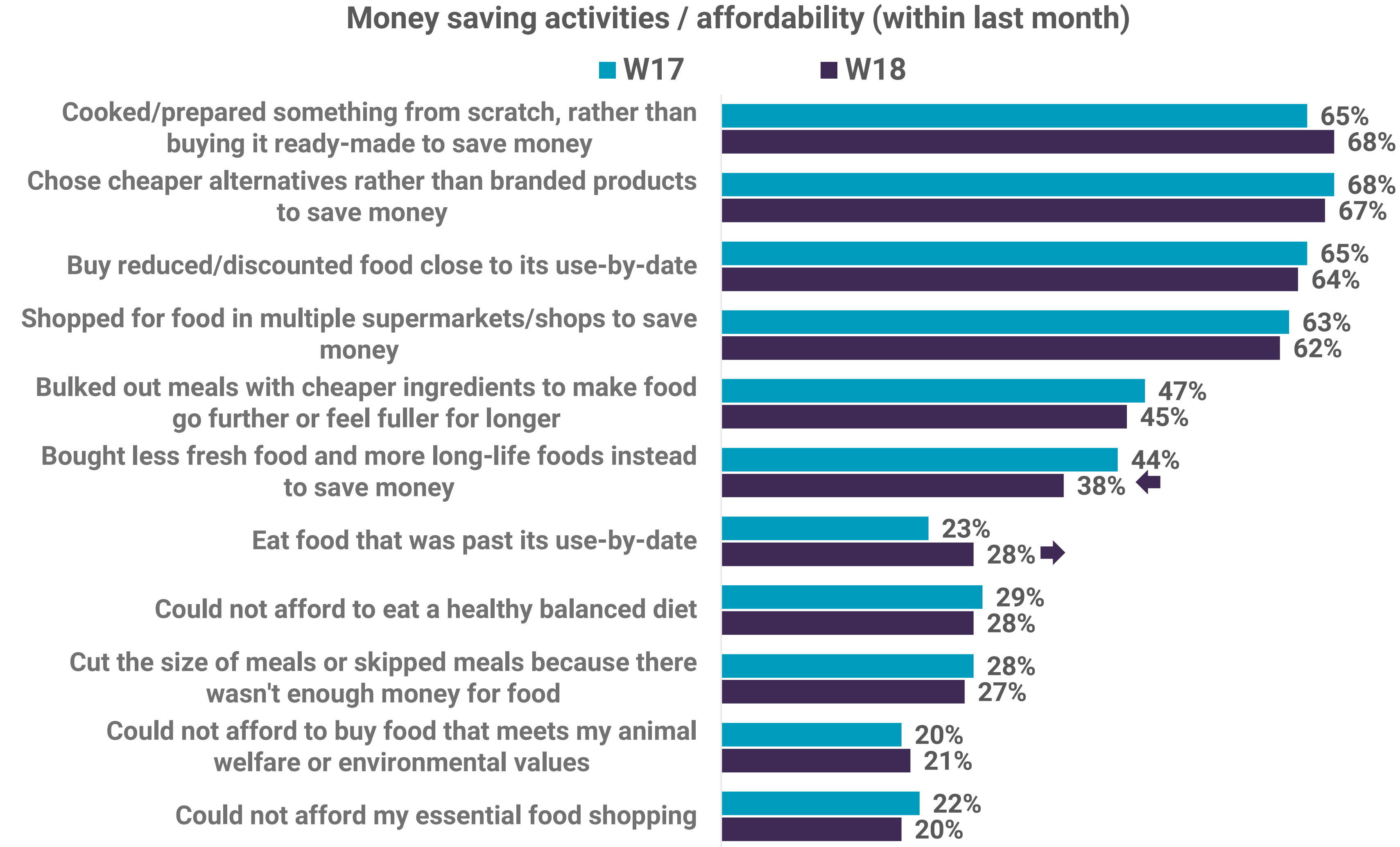
As with the previous Wave 17 riskier ways of food preparation by reducing cooking time or lowering cooking temperatures were more common in the youngest age group, ethnic minority respondents and those with children.





Q6. In the last month, which, if any, of the following have you done to reduce your energy bills and save money? Base (all): 1,027

The top four most often mentioned money saving activities are in keeping with Wave 17. Worryingly nearly one in three (28%) ate food that was past its use by date - this is a significant increase on the previous Wave 17. Fewer consumers bought less fresh food and more long-life food this wave.

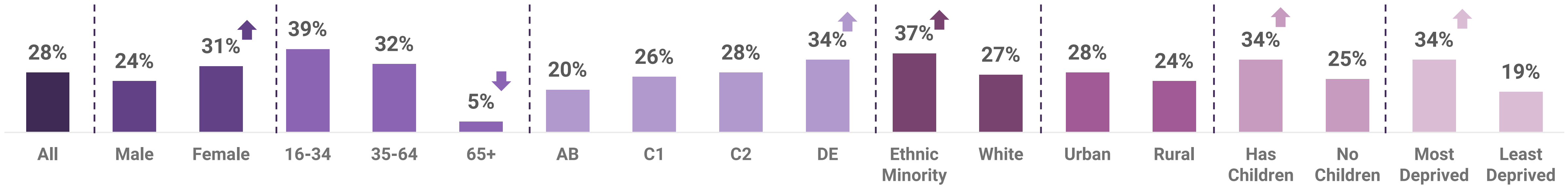


- Some subgroups were particularly likely to be undertaking money saving actions: those who said they'd been worried about being able to afford food in the last year, those who received help with their shopping, those who were working, those who said they found it hard to eat healthy, those who were allergic, intolerant or avoided some types of food, and those who said they were worried about there not being enough food for them/their household to buy in the next month, were all significantly more likely to report 8+ money saving activities.
- In keeping with last wave 28% could not afford to eat a healthy balanced diet and a similar proportion (27%) were either making meals smaller or skipping meals.
- A fifth could not afford essential shopping.

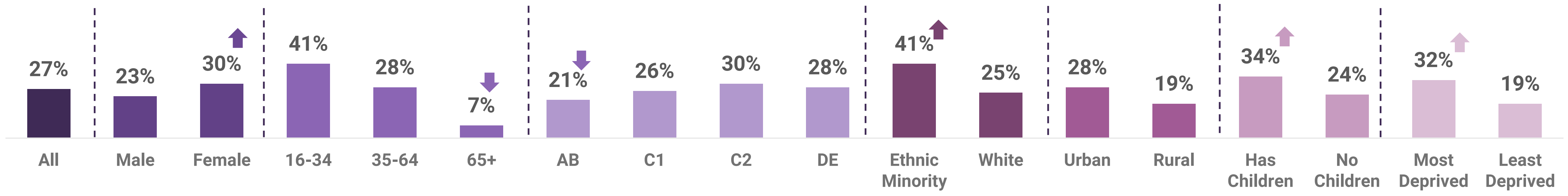
Q8. In the last month, did any of the following apply to you, or someone else in your household? I, or someone in my household... ,Q9. In the last month, did you, or someone else in your household buy reduced / discounted food close to its use-by-date to save money? Q10. In the last month, did you, or someone else in your household eat food that was past its use-by-date because they couldn't afford to buy more food? Base (all) W17: 1,037, W18: 1,027

The most deprived versus least deprived SIMD quintiles are more likely to experience these food poverty indicators. This is also true for those with children, ethnic minorities and women.

Could not afford to eat a balanced diet (in last month)



Cut the size of meals because there wasn't enough money for food (in last month)



Q8. 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 (all): 1,027

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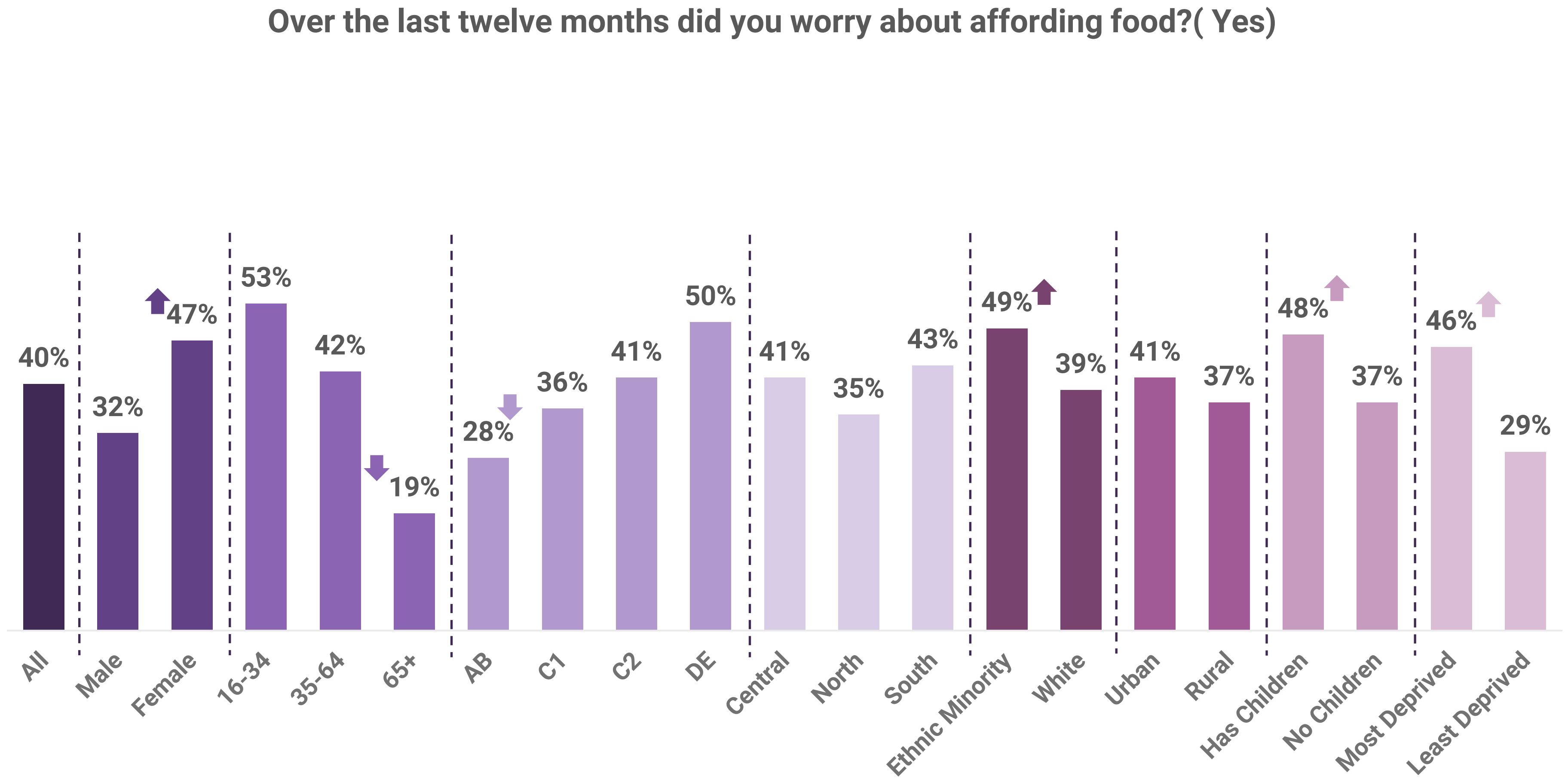
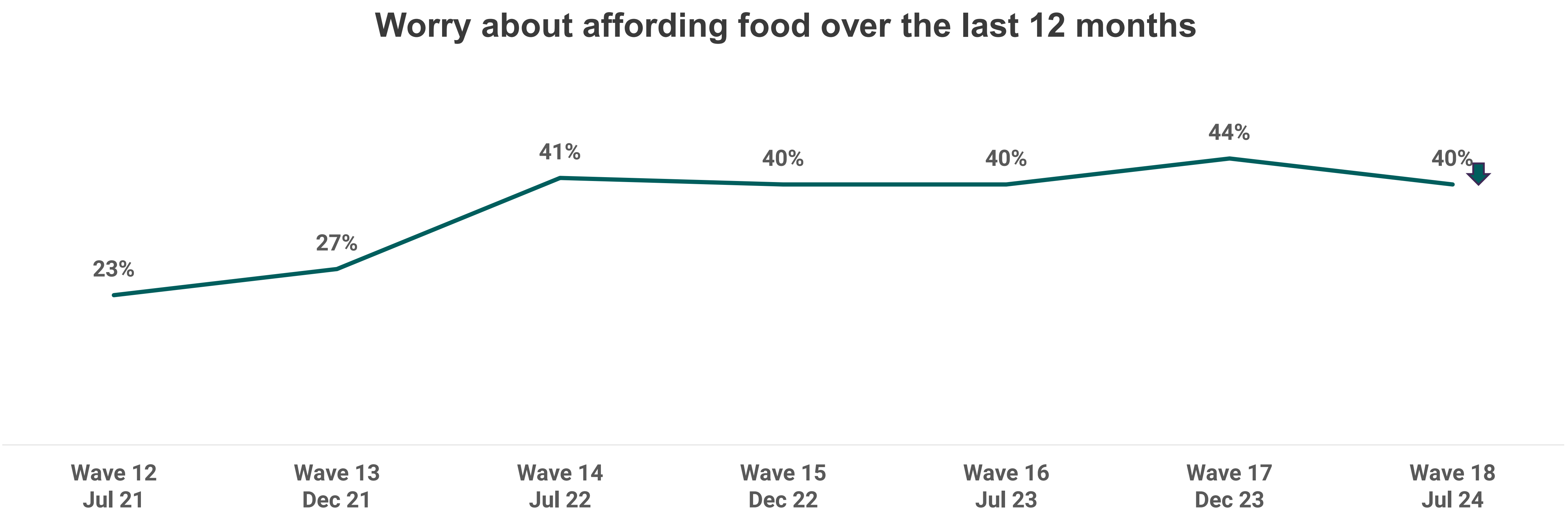
As with other food poverty indicators, women, those with children, ethnic minorities and most deprived SIMD quintiles were more likely to worry about affording food.



- Working households, those with diagnosed physical or mental health problems, those with food allergy and intolerance, those who find it hard to eat a healthy balanced diet and those who worry about there being enough food available for their household were also more likely than others to worry about affording food.

Q7. Over the last twelve months did you worry about affording food? Base (all): 1,027

Fewer consumers this wave were worried about affording food compared to last wave (W18 ~ 40% vs W17 ~ 44%)



Q7. Over the last twelve months did you worry about affording food? Base (all) W18: 1,027 All waves from Wave 12 to Wave 17 *n*>1,000

Affordability – Summary

- This wave saw a reduction across many of the money saving actions designed to reduce energy bills. This could reflect the summer month in which the fieldwork took place. However, two thirds of consumers had saved on energy bills by using cheaper cooking methods - this is a significant reduction on the last wave.
- Nearly one in five (18%) had lowered the cooking temperature for food and one in 6 (16%) had reduced the length of time food was cooked for.
- Riskier ways of food preparation by reducing cooking time or lowering cooking temperatures were more common in the youngest age group, Ethnic Minority respondents and those with children.
- Worryingly, nearly one in three (28%) ate food that was past its use by date. This is a significant increase on the previous Wave 17.
- While fewer consumers this wave were worried about affording food compared to last wave, two in five (40%) experience this worry.

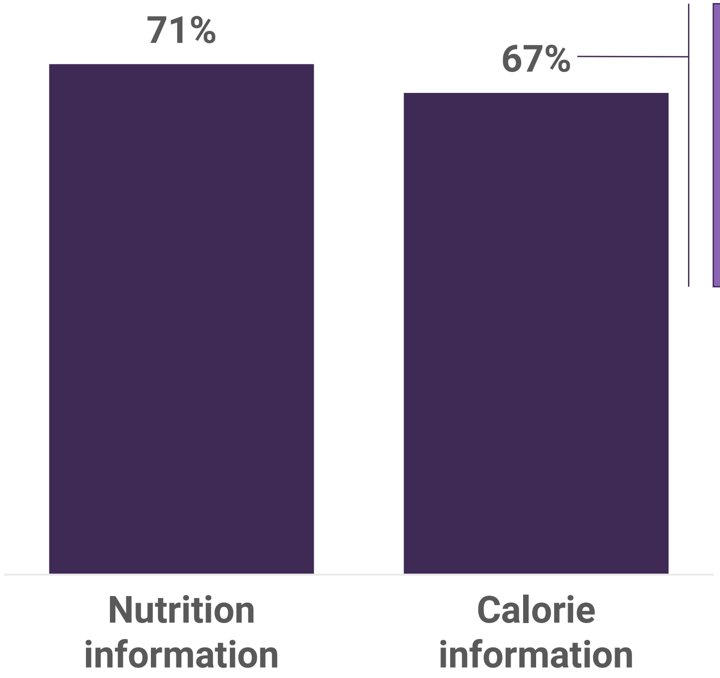
The most deprived versus least deprived SIMD quintiles, those with children, ethnic minorities and women are more likely to experience food poverty indicators such as food affordability, cutting food amount and skipping meals. Cost saving and food poverty also applies to those who received help with their shopping, those who were working, those who said they found it hard to eat healthy, those who were allergic and intolerant or avoided some types of food.

Healthy eating

This section was not run last wave and some questions are new

Most consumers believe that nutritional and calorie information should be available on request at cafés/restaurants, fast food outlets, takeaways and on the go outlets. Two fifths of those who would like to have information think it should be available in all types of eateries.

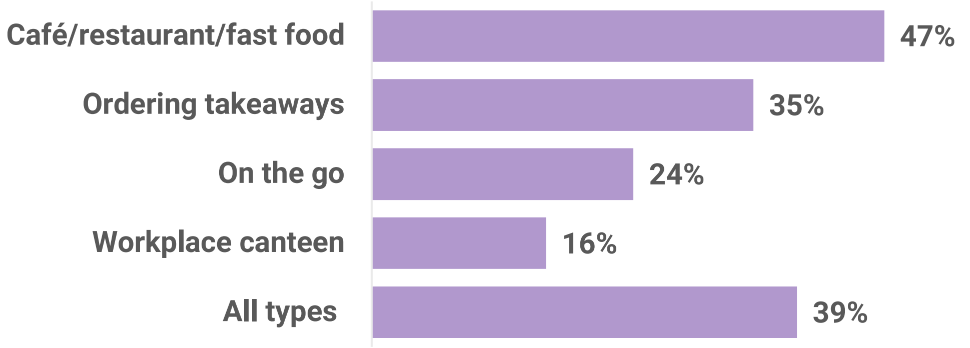
Information that should be available on request when eating out (% Yes)



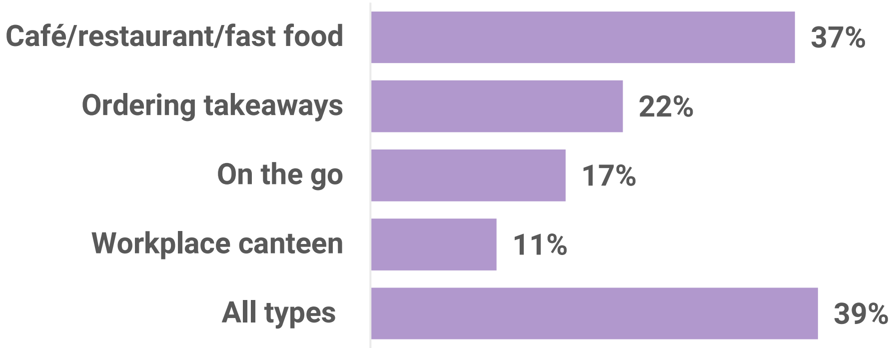
36% said they would request calorie information if it was available

78% thought nutritional and/or calorie information should be available on request

What types of eateries would you ask for calorie information? (those who would request it)



What types of eateries would you ask for nutritional information? (those who think it should be available)



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Q11. Do you think that calorie information should be available on request when eating out? Q12a. If calorie information was available on request, would you request it? And Q13. Should nutrition information be available on request? Base (all): 1,027, Q12b. What types of eateries would you ask for calorie information? Base (all who would request calorie information): 367, Q13a. What types of eateries would you ask for this information? Base (all who think nutritional information should be available): 732

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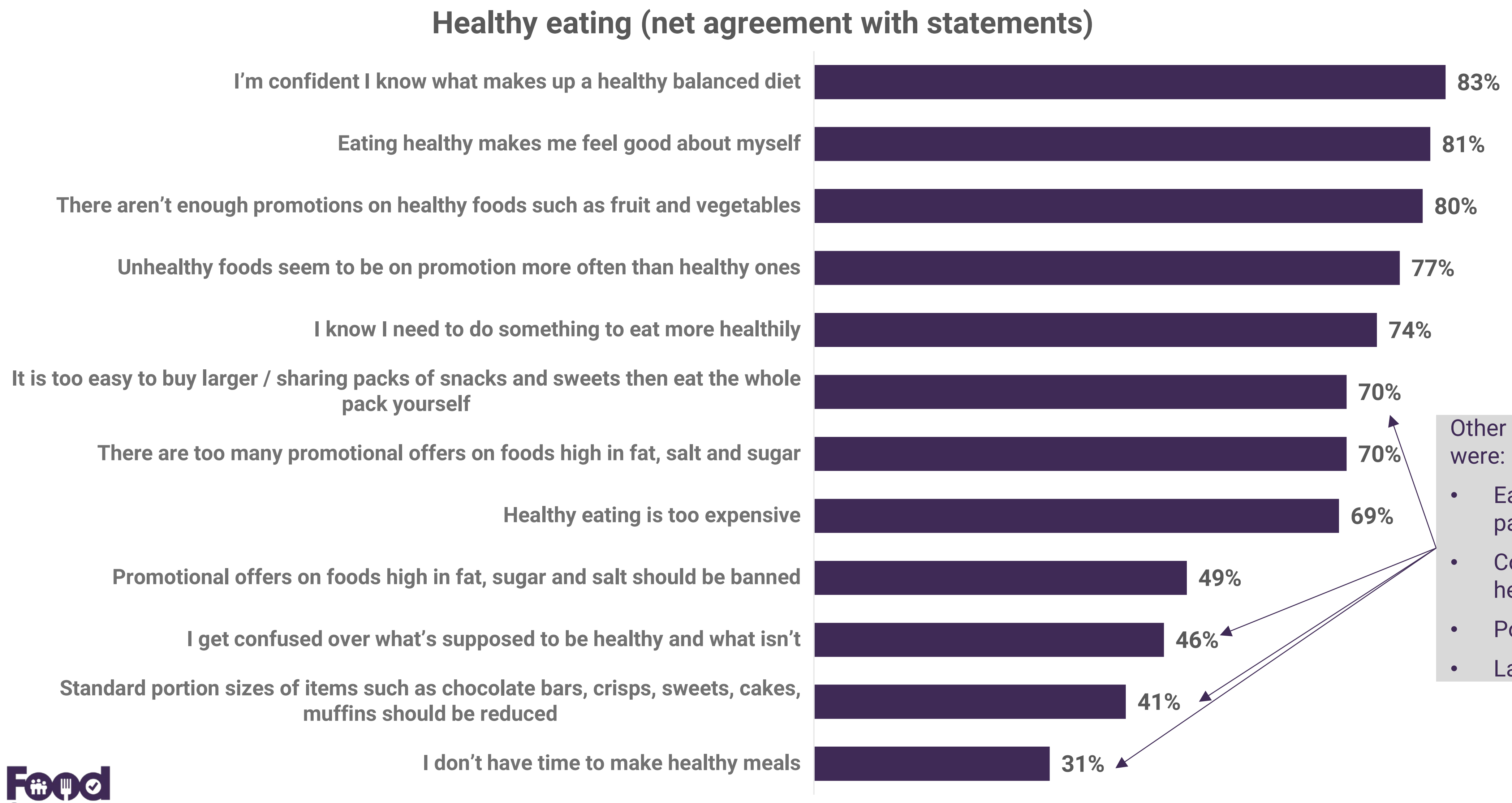
Most consumers agreed that they are confident in knowing what makes a healthy diet and that healthy eating makes them feel good. Most agreed on the statements regarding the need for promotions on healthy food and just under half agreed to a ban on promotion of food HFSS. Worryingly most believe that healthy eating is too expensive.

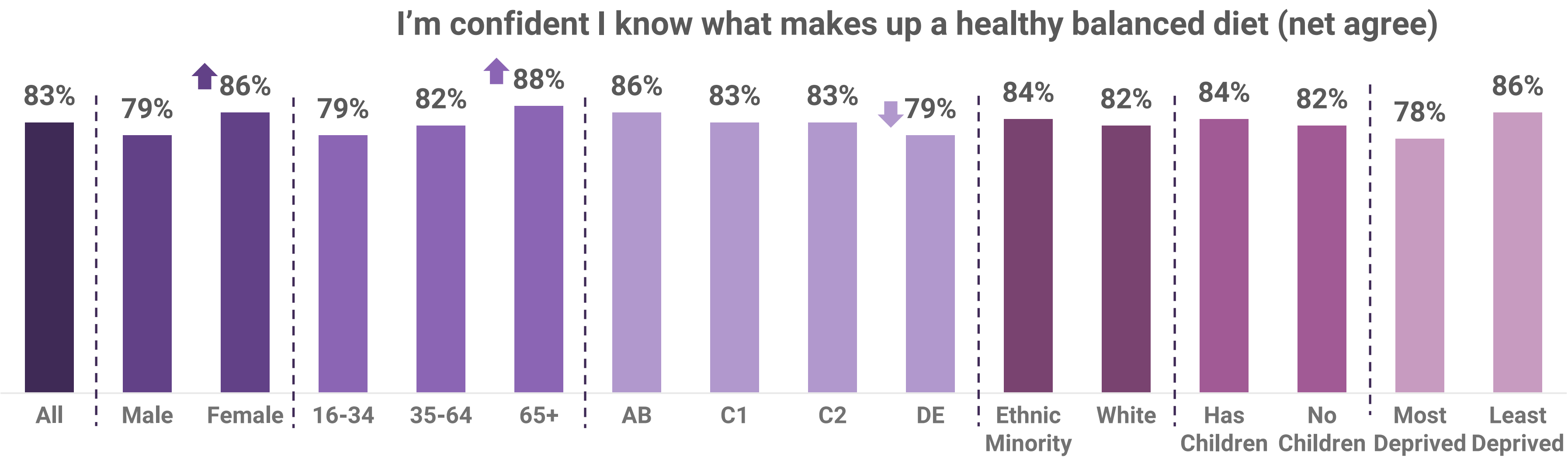


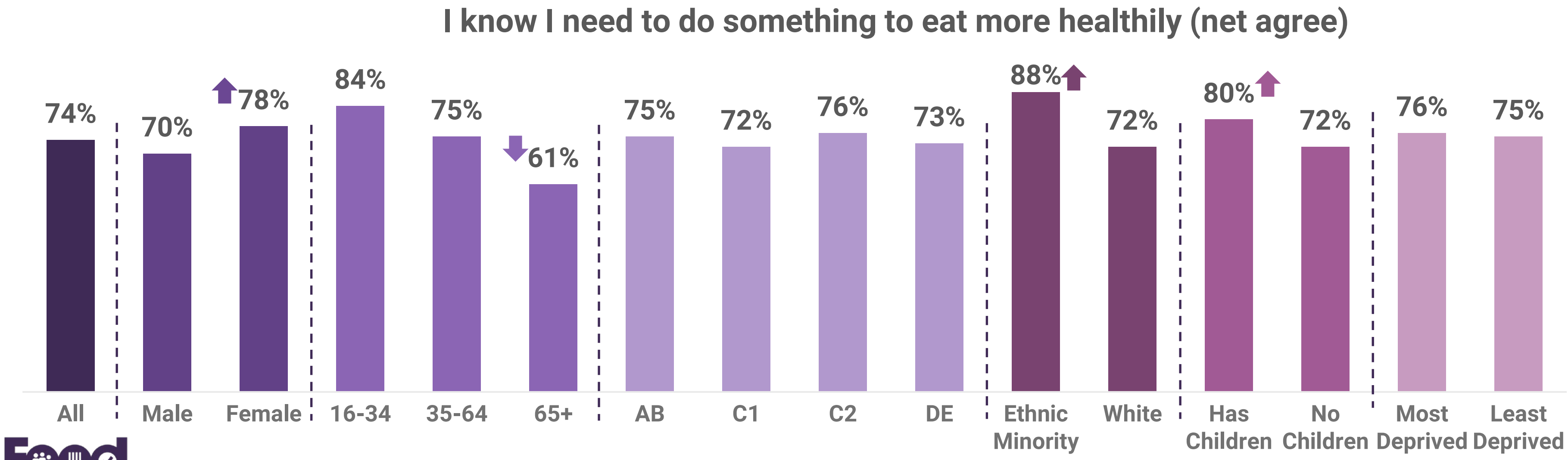
Other barriers to healthy eating were:

- Ease of buying larger packs
- Confusion over what is healthy
- Portions being too large
- Lack of time

Q14. How much do you agree or disagree with each of these statements? Base (all): 1,027

Levels of claimed confidence in what makes a healthy balanced diet were high and fairly consistent across groups. The majority of consumers also felt they need to do something to eat more healthily. These beliefs create conflict with the understanding that healthy eating is too expensive.



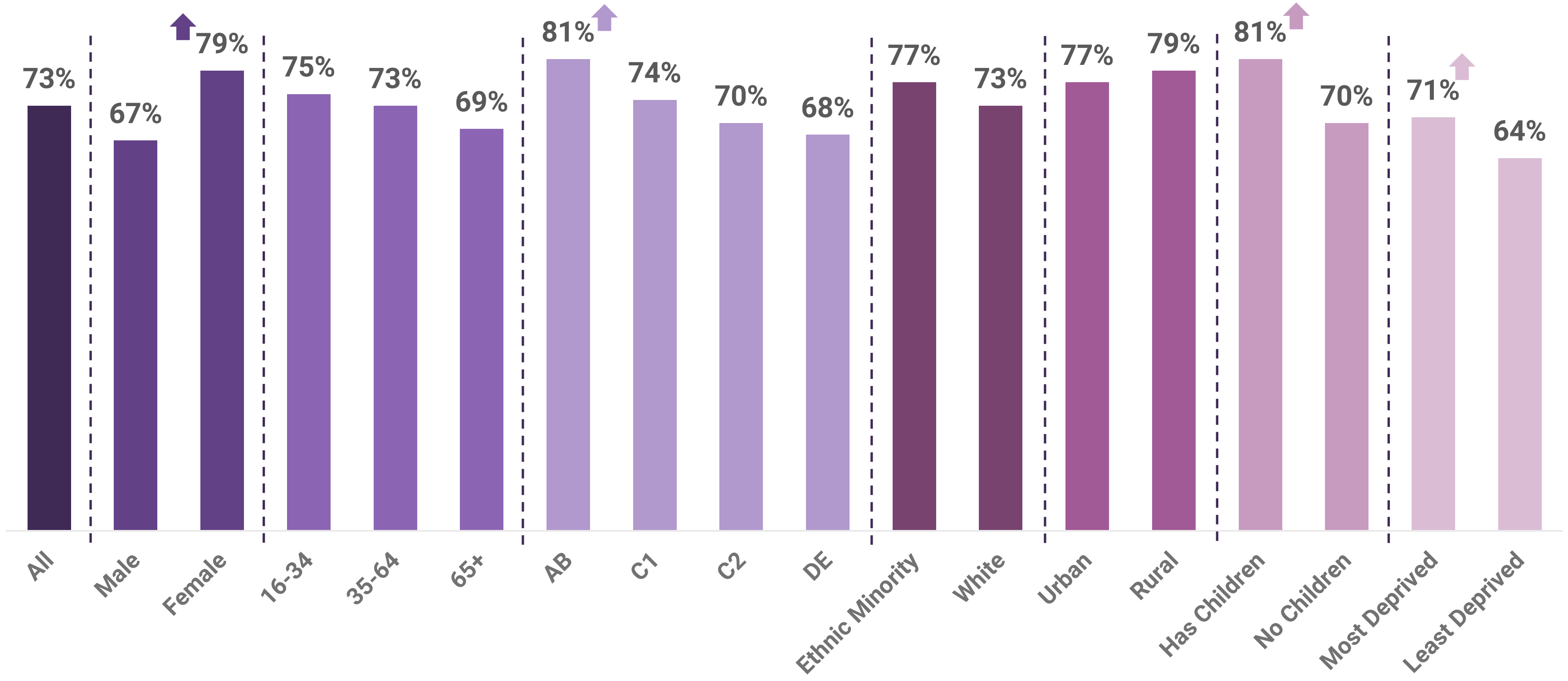


- Women, those over 65 years old, those who didn't worry about affording food and those who think nutritional information should be available were more likely to say they were confident in what makes a healthy balanced diet.
- Women, younger age groups, those working, ethnic minorities, those diagnosed with a health condition, those who receive help with shopping, those who worry about affording food, those who find it difficult to eat a healthy diet and those worried about availability of food all were more likely to say they need to do something to eat more healthily.

Q14. How much do you agree or disagree with each of these statements? Base (all): 1,027

The majority claimed to have clear information of eating a healthy balanced diet. Females, AB SEG and those with children. Those in the most deprived SIMD quintile were more likely than those in the least deprived SIMD quintile to say yes to this. It could be that those in more affluent areas do not think they need information on this.

Do you have clear information of eating a healthy balanced diet? (% Yes)



- Men, those who had not heard of FSS, those who find it difficult to eat a healthy balanced diet were more likely to say no to this question.

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Q15. Do you have clear information on eating a healthy balanced diet? Base (all): 1,027

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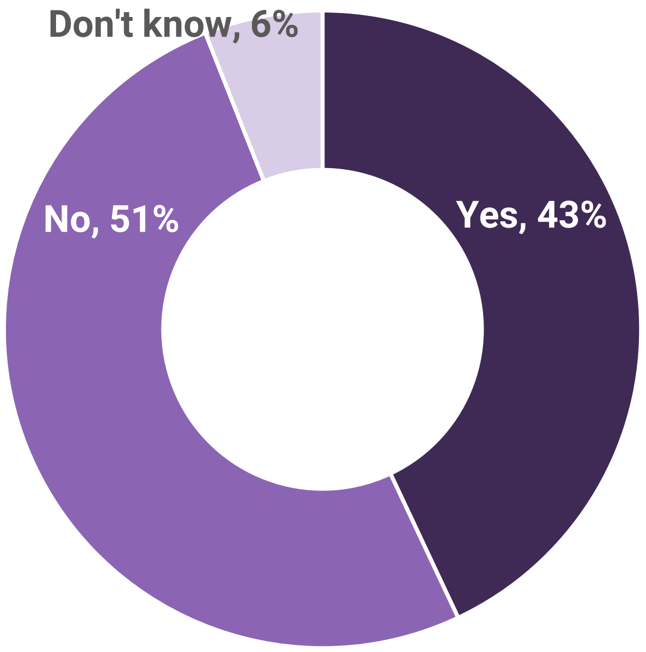
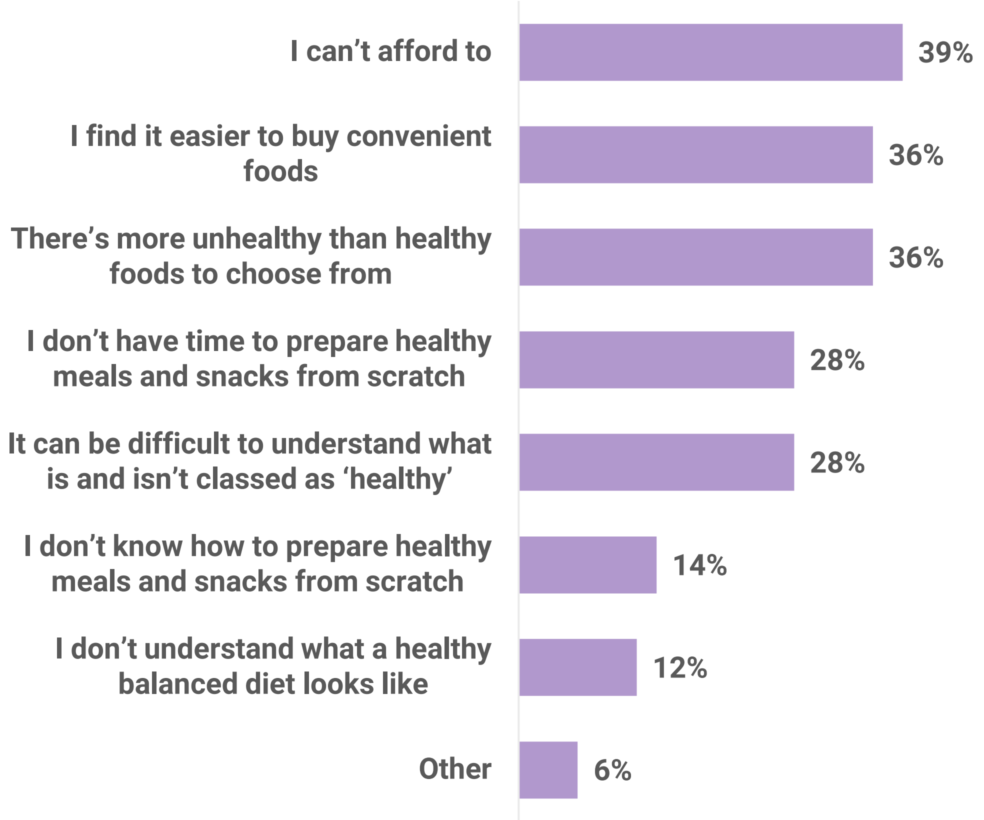
Two fifths claimed to find it hard to eat a balanced diet and the main reasons were lack of affordability, ease of buying convenience foods and availability of unhealthy foods.

Do you find it difficult to eat a healthy balanced diet?



Why eating a healthy balanced diet is difficult (those who find it difficult)



- Women, younger age groups, SEG DE, those working, those with diagnosed health issues, those who worry about affording food, those who do not have clear information on balanced diet, those who worry about not enough food available and those who think nutrition info should be available were all more likely than others to answer yes in response to finding it difficult to eat a healthy balanced diet.

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Q16. Do you find it difficult to eat a healthy balanced diet? Base (all): 1,027, Q17. Why? Base (all who find it difficult): 439

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Healthy eating – Summary

- The majority of consumers believed that nutritional and calorie information should be available on request.
- The majority agree that more needs to be done in terms of promoting healthy food and there are too many promotions on foods HFSS. Just under half thought that promotions on foods HFSS should be banned.
- Levels of claimed confidence in what makes a healthy balanced diet were high and fairly consistent across groups. The majority of consumers also felt they need to do something to eat more healthily.
- The majority claimed to have clear information of eating a healthy balanced diet.
- Worryingly most believe that healthy eating is too expensive.
- Two fifths claimed to find it hard to eat a balanced diet and the main reasons were lack of affordability, ease of buying convenience foods and availability of unhealthy foods.

Consumers could be supported a lot more to make healthy eating choices. More could be done regarding promotion and educating about healthy eating. At the same time promotions and packaging of unhealthy foods needs to be controlled to support consumers in making healthy choices.

Labelling

New question set

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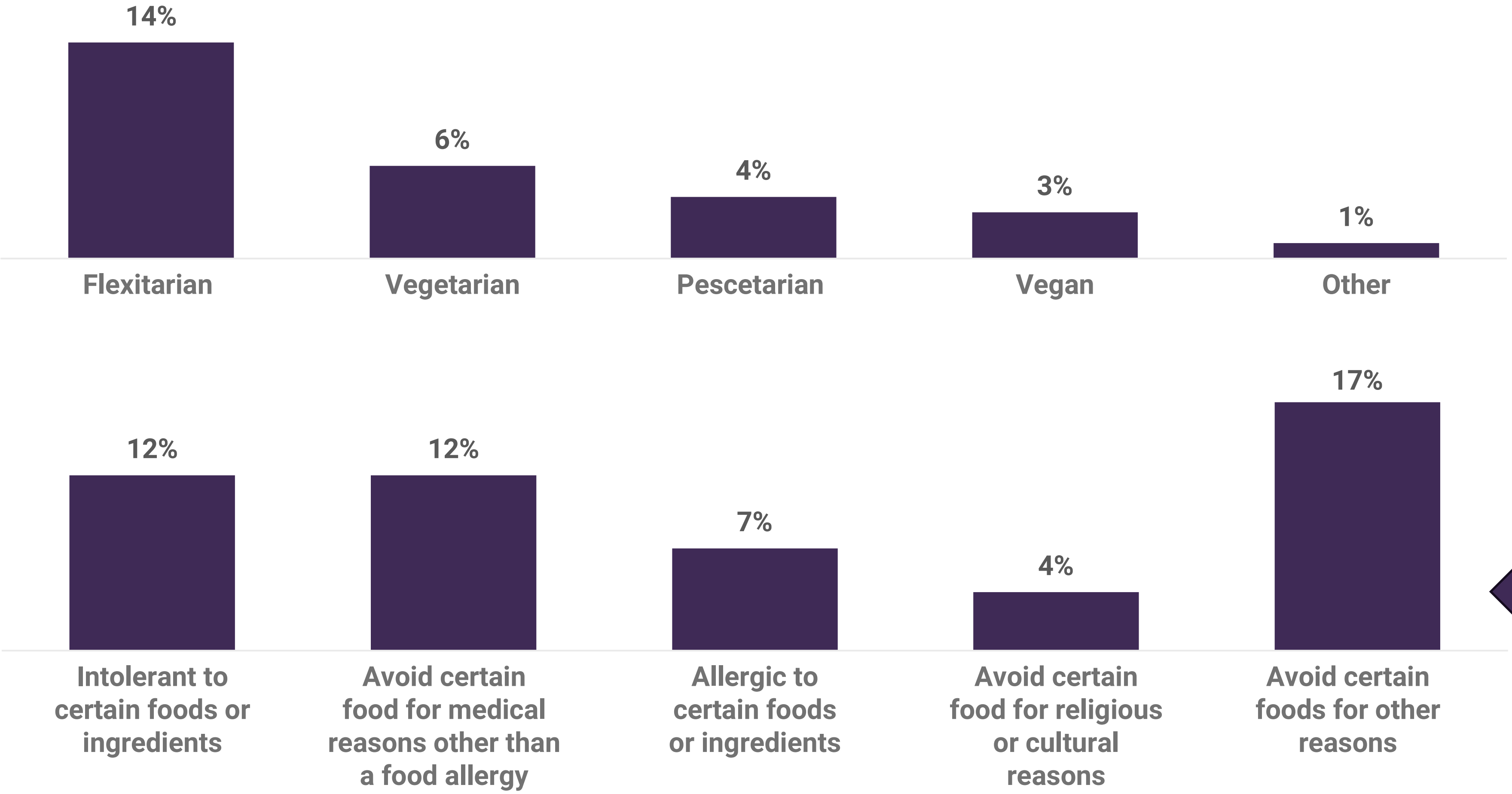
A large number of consumers (35%) shop and cook for someone with dietary constraints which makes labelling very important. Half of the sample had some form of dietary constraint.

Dietary choices/constraints



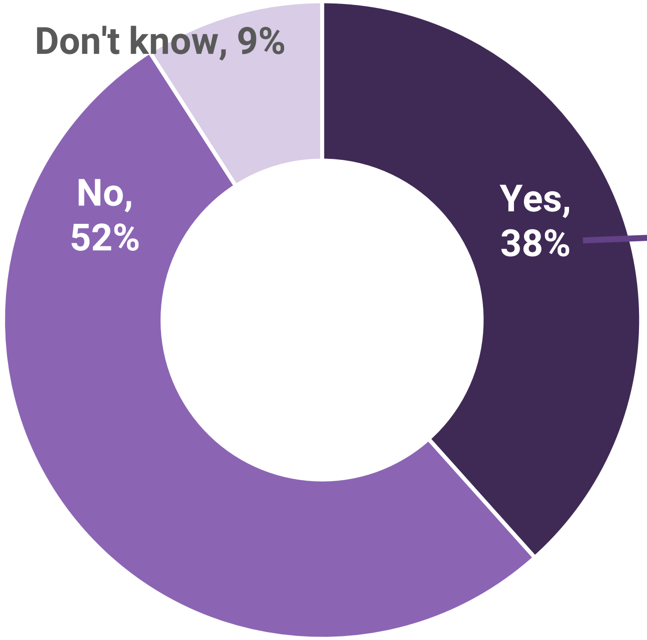
- Half of the sample (51%) had no eating constraints at all.

- 35% of the sample said they or someone they cook/shop for had an intolerance or allergy, avoided some foods for medical or other reasons.
- All of these combined.

Q18. Which of the following applies to you or someone you cook/shop for? Base (all): 1,027

Many consumers were unaware that vegan products may not be suitable for those with allergies. Those who have or cook/shop for someone who has intolerance allergy or avoids certain food had a slightly higher awareness however, over half (53%) were not aware which highlights the need for precise labelling.

Before today were you aware that vegan products may not be suitable for those who have an allergy to milk, eggs, fish, crustaceans, molluscs due to manufacturing processes?



47% among those who have or cook/ shop for someone with an allergy, food intolerance, or who avoid some foods

- Awareness is higher among those aged under 35 (52%) compared to 35-64s (36%) and those aged 65+ (25%).
- Those from a minority ethnic background (60%), those with children under 18 living at home (49%), and those who receive help with their shopping (55%) also had higher awareness; as did those who had heard of FSS (41% vs 26% of those who hadn't heard of the organisation).
- Those with concerns about food also had above sample average awareness (50% of those who said they were worried about there not being enough food available for them/their household to buy in the next month, and 44% of those who had felt worried about being able to afford food in the last year were aware); as did those who felt they had clear information about eating a healthy balanced diet (43%).
- A high proportion of Vegans (84%) were aware and most other groups with dietary restrictions had above sample average awareness leaving between a quarter to nearly half of all of the groups with dietary restrictions being unaware.

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Q19. Before today were you aware that vegan products may not be suitable for Those who have an allergy to milk, eggs, fish, crustaceans, molluscs due to manufacturing processes? Base (all): 1,027

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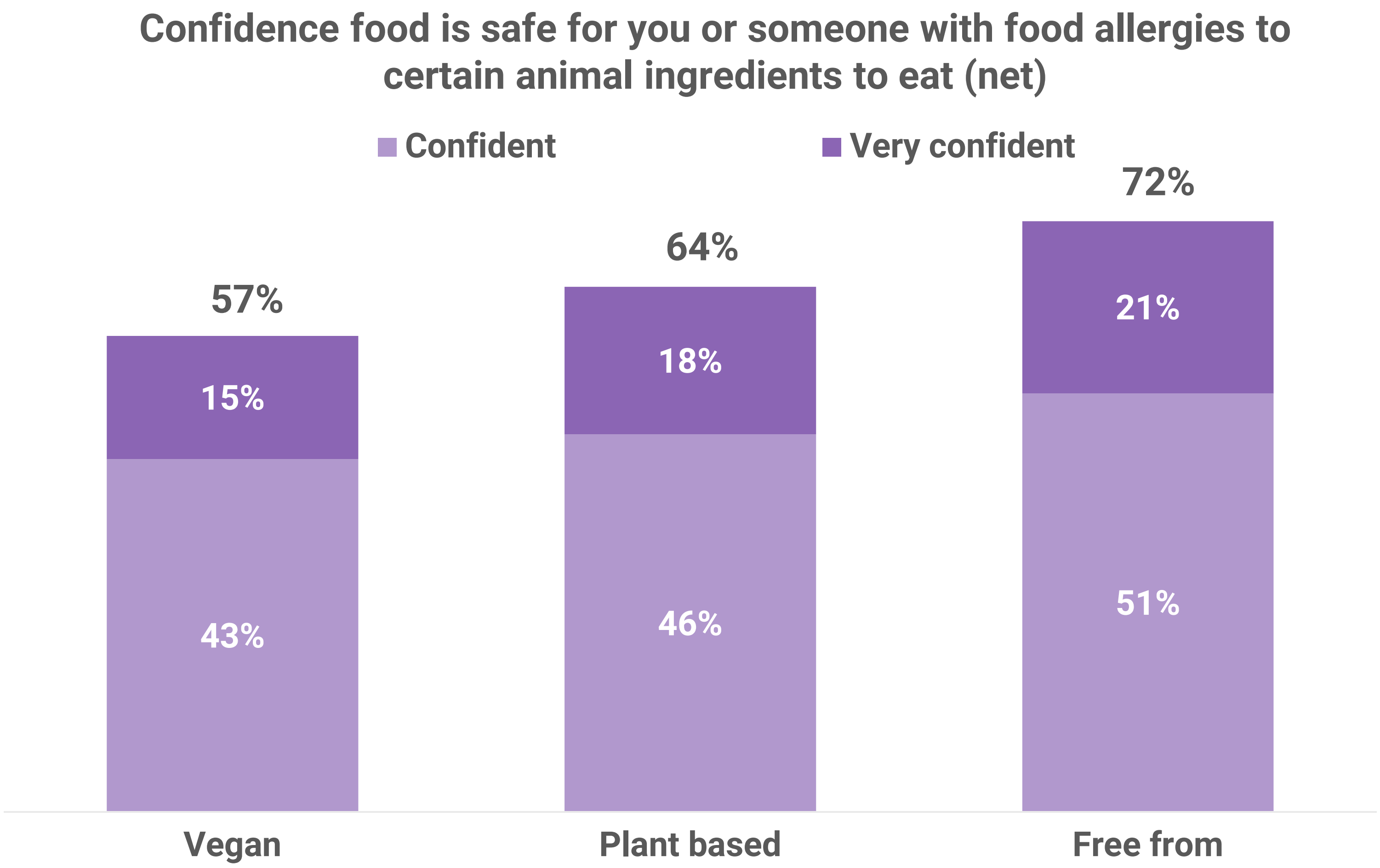
Consumers had higher levels of confidence in the label "Free from" to indicate safety for those with allergy to animal ingredients than they did "Plant based" or "Vegan". This is indicative of high levels of confusion over labelling.

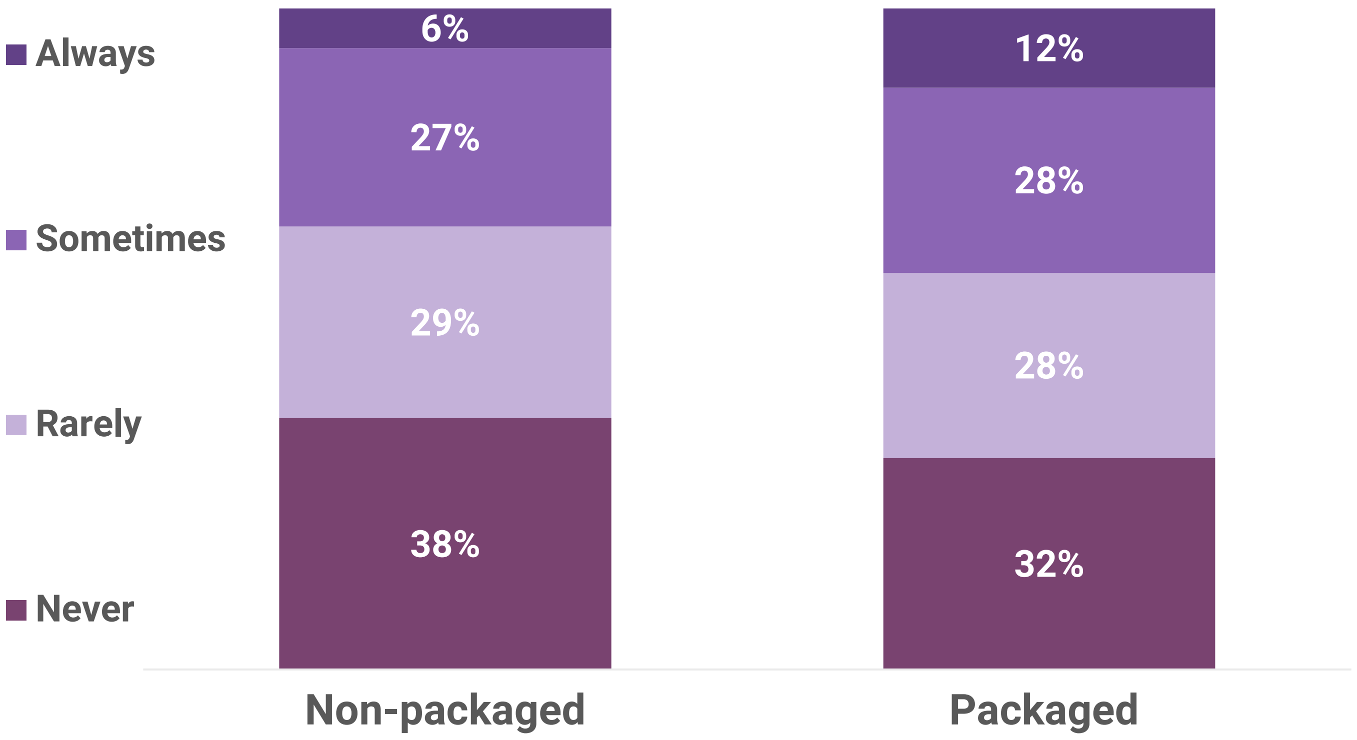


- Those aged 65 and over were more likely than others to say they were <u>not</u> confident food labelled 'vegan', 'plant based' or 'free from' was safe for them or those who were allergic to animal ingredients to eat.

Q20. For each of the terms below, please say how confident you are that the term indicates that the food is safe for you or someone with food allergies to certain animal ingredients to eat? Base (all): 1,027

A third (33%) of those who have or cook/shop for someone who has intolerance allergy or avoids certain food use the term Vegan to determine safety on non-packaged food and two fifths (40%) use it to determine safety on packaged food.

How often, if at all, do you use the vegan labelling or descriptions (e.g. vegan burger) to decide if a food is safe for you to eat? (those who have or cook/shop for a person with a food allergy or intolerance, or who avoid certain foods)



- Those aged 16-34 were less likely than older respondents to say they never use vegan labelling or descriptions to make a decision about food safety.

Q21. How often, if at all, do you use the vegan labelling or descriptions (e.g. vegan burger) to decide if a food is safe for you to eat? Base (all who have or cook/shop for a person with a food allergy or intolerance, or who avoid certain foods for religious, cultural, medical or other reasons): 354

Labelling – Summary

- A large number of consumers (35%) shop and cook for someone with dietary constraints which makes labelling very important. Half of the sample had some form of dietary constraint.
- Over half (53%) of those who have or cook/shop for someone who has intolerance allergy or avoids certain food were not aware that vegan products may not be suitable for those with allergies, which highlights the need for precise labelling.
- Consumers had higher levels of confidence in the label “Free from” to indicate safety for those with allergy to animal ingredients than they did “Plant based” or “Vegan “. This is indicative of high levels of confusion over labelling.
- A third (33%) of those who have or cook/shop for someone who has intolerance allergy or avoids certain food use the term Vegan to determine safety on non-packaged food and two fifths (40%) use it to determine safety on packaged food.

There is a lot of confusion over labelling. The terms *Vegan, Plant Based and Free From* are widely misunderstood and confused and build false confidence that products will, for those with allergies, be safe to consume.

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Food security

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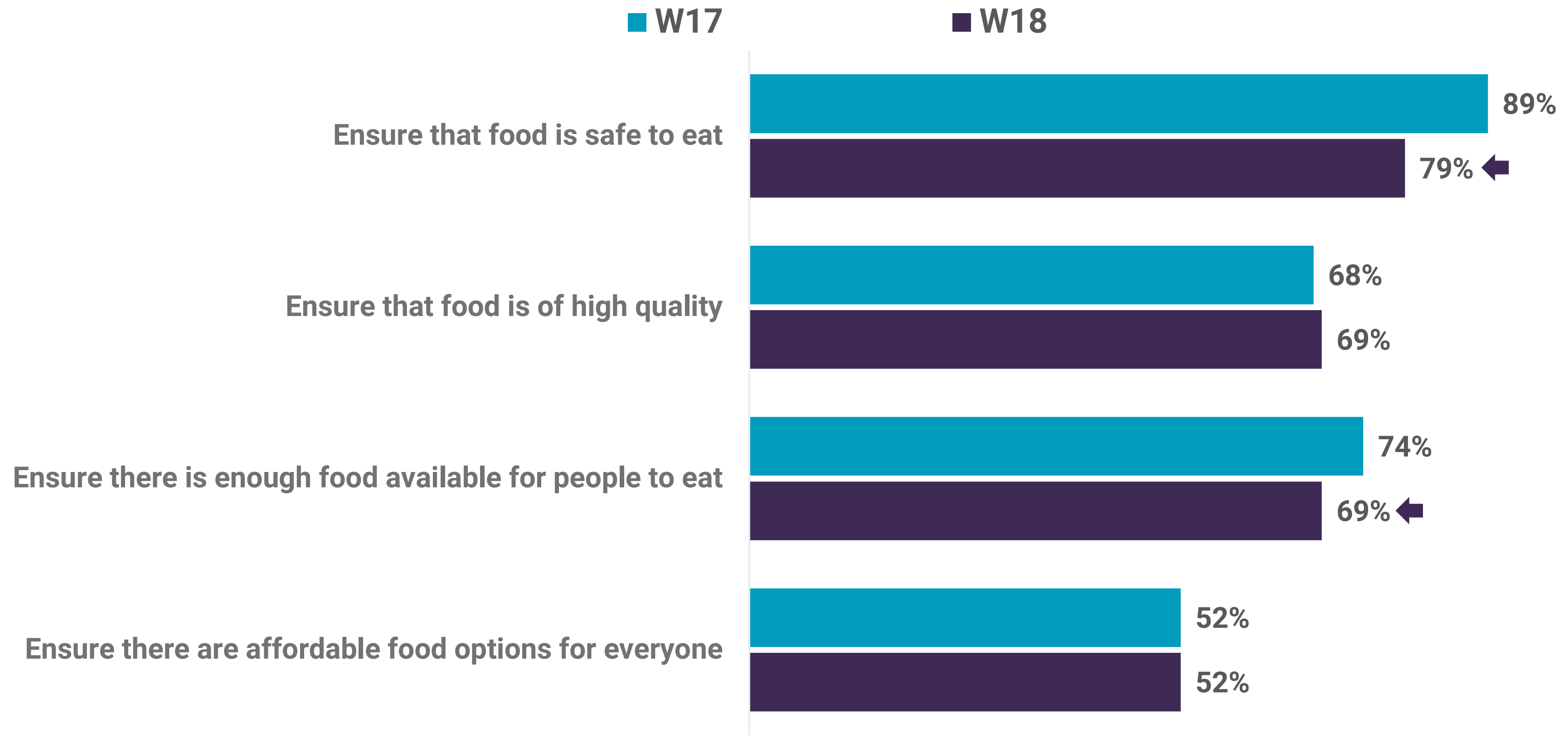
Confidence in the food supply chain is lower this wave compared to last for food being safe to eat and there being enough food available to eat. Confidence in affordable food is lower than it is for safety, quality and availability.

How confident are you in the food supply chain? This includes farmers, manufacturers and shops and supermarkets in the UK. How confident are you that they….? (Very or Fairly Confident)



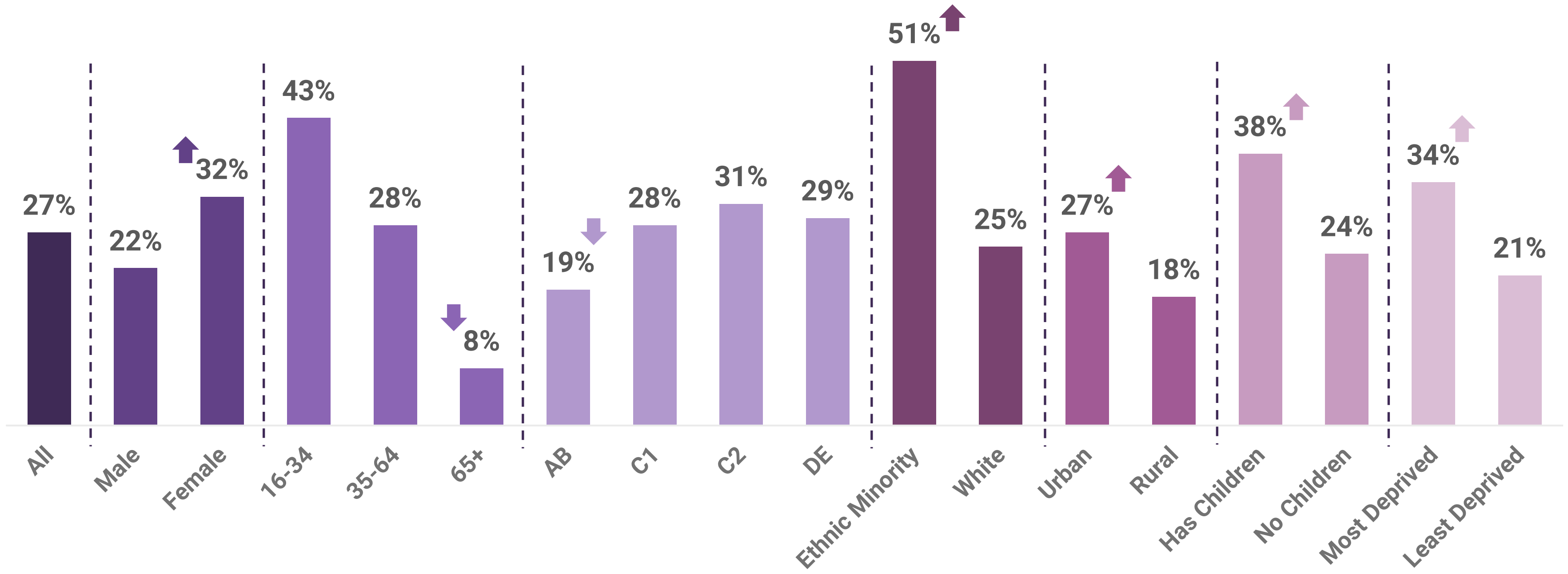
- Confidence in food safety (80%) and food quality (71%) was higher among those who were aware of FSS when compared to those who were not aware of FSS (72% ~ 63%).

Q22. 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 (all) W17: 1,037, W18: 1,027

Concern over food being available has significantly reduced. However, over a quarter expressed worry.

To what extent, if at all, are you worried about there not being enough food available for you/your household to buy in the next month? (Somewhat or Very worried)

- In Wave 17 31% of the sample were worried about food availability.



- Those in SEG AB were less worried than others, those over 65 years old were less worried than other age groups.
- Women, those from ethnic minority groups, those in urban areas, those with children and those in the most deprived SIMD quintile were more likely to be worried.

Q23. To what extent, if at all, are you worried about there not being enough food available for you/your household to buy in the next month? Base (all): 1,027

Food Security – Summary

- Confidence in the food supply chain is lower this wave compared to last for food being safe to eat and there being enough food available for.
- Confidence in affordable food is lower than it is for safety, quality and availability.
- Confidence in food safety and food quality was higher among those who were aware of FSS.
- Concern over food being available has significantly reduced. However, over a quarter expressed worry.
- Women, those from ethnic minority groups, those in urban areas, those with children and those in the most deprived SIMD quintile were more likely to be worried.

Confidence in the safety of the UK food supply chain has fallen. While concern for availability has lessened, over a quarter of consumers expressed concern which was higher in most deprived SIMD quintile but significantly lower in more affluent groups.

Appendices

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Subgroup base size information (weighted)

	All	Male	Female	16-34	35-64	65+	AB	C1	C2	DE	SIMD 1	SIMD 5	Urban	Rural
Total sample	1,027	492	534	286	493	248	195	318	246	267	206	140	768	116
Those aware of FSS	844	400	444	221	418	204	159	259	206	220	181	113	637	94

	South	North	Central	Working	Not in work	BAME	White	Long term health condition (lthc)	No lthc	Children at home*	No children at home
Total sample	51	247	729	579	434	89	933	317	687	271	756
Those aware of FSS	46	195	603	482	351	66	774	259	563	230	613

	Have help with shopping	No help	Worried re: affording food (last 12 months)	Did not worry	Have clear info on diet	No info	Find it hard to eat healthy balanced diet	Don't find it hard
Total sample	177	837	406	593	748	199	445	520
Those aware of FSS	150	682	330	493	633	150	378	420

	Aware FSS	Not aware	Have or cook/shop for someone with an allergy, intolerance or who avoids some foods	No food avoidance	Worried about food availability in next month	Not very worried	Not at all
Total sample	844	183	356	671	280	314	410
Those aware of FSS	844	-	295	549	238	248	339

*Aged under 18

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Technical appendix

- Data was collected by online survey.
- The target group for this research study was adults aged 16+ living in Scotland.
- The sample type was non-probability. The sample source was a combination of access panels.
- The target sample size was 1,000, and the final achieved sample size was 1,027.
- Campaign fieldwork was undertaken between the 24th and 27th of June 2024.
- The criteria used in sample selection were that panellists fit the target audience criteria.
- Respondents to self-completion studies are self-selecting and complete the survey without the assistance of a trained interviewer. This means that Progressive cannot strictly control sampling and in some cases, this can lead to findings skewed towards the views of those motivated to respond to the survey.
- Quota controls were used to guide sample selection for this study. This means that we cannot provide statistically precise margins of error or significance testing as the sampling type is non-probability. The margins of error outlined below should therefore be treated as indicative, based on an equivalent probability sample. Margins of error calculated at the 95% confidence level (market research industry standard) are as between ±0.61% and ±3.06%.
- The final data sets were weighted so that the sample would be broadly in line with the profile of age, gender and SEG for Scotland. The weighting efficiency was 95%. The sample bases did not change size after weighting.
- Data gathered using self-completion methodologies are validated using the following techniques: Where the data is collected via an internet survey using an access panel, all respondents can only submit one response due to a system of unique IDs used by panel providers.
- Our data processing department undertake a number of quality checks on the data to ensure its validity and integrity, including checks for speeding, flatlining and quality of open-ended responses. Where ‘other’ type questions are used, the responses to these are checked against the parent question for possible up-coding.
- Responses to open-ended questions will normally be spell and sense checked. Where required these responses may be grouped using a code-frame which can be used in analysis.
- A SNAP programme set up with the aim of providing the client with useable and comprehensive data. Cross-breaks are discussed with the client in order to ensure that all information needs are met. The following methods of statistical analysis were used: Z tests, t-tests.
- All research projects undertaken by Progressive comply fully with the requirements of ISO 20252.

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