Consumer insights report

November 2021

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Contents

Executive Summary

This publication provides a summary of the FSA's latest consumer insights data, with a particular focus on the following topics:

- Recent trends in household food insecurity and consumer perceptions of food affordability, including food prices
- Consumer perceptions of food availability, including stockpiling behaviour
- Consumer concerns in relation to food including concerns about the upcoming Christmas/New Year period
- Consumer confidence in the food supply chain and it's regulator

The data captured within this report is drawn from various tracking surveys commissioned by the FSA, via Ipsos MORI, from April 2020 until November 2021. Key findings from this report are:

Food availability and stockpiling

- Latest data shows that 28% of participants reported feeling worried about food availability in November 2021. This was even higher in October 2021 (32%); a similar proportion to April 2020, during the first UK national lockdown (31%).
- Over half of participants (53%, in November 2021) reported at least one type of food as 'unavailable' when doing their food shopping, however most participants were able to find a suitable substitute for items that were 'unavailable'.
- The most common type of over-purchasing was buying additional food in preparation for Christmas, which has increased significantly in recent weeks (7% at the end of September, 23% in November 2021).

Food affordability and food insecurity

- 3 in 5 participants (60%, November 2021) believed that their food shopping had got more expensive in the past week. This proportion had increased significantly since the end of September 2021 (49%).
- Concerns about food affordability are almost as high now (25% in November 2021) as they were in April 2020, during the first UK national lockdown (28%).
- The proportion of participants who reported cutting down the size of meals or skipping meals because they could not afford to buy food was 21% in November 2021; this is higher than April 2020 (18%). Reported use of food banks has also

increased; 11% reported using food banks in November 2021 compared to 8% in April 2020.

Perceptions and concerns in relation to the food industry

- There is increasing concern amongst participants about the quality of food produced inside the UK; 35% in November 2021 reported feeling concerned compared to just 26% in December 2020. A similar proportion are also concerned about the safety of food produced in the UK (33%).
- 71% of participants reported that they were concerned about food prices (November 2021); this is the highest rated concern (based on a prompted list).
- With regards to Christmas and New Year, participants are most concerned about the price (62%) and availability of food (48%), while smaller proportions are concerned about the quality (37%) and safety (31%) of food for Christmas and New Year (November 2021).

Confidence in the food system and it's regulator

- 69% of participants reported feeling confident in the food supply chain (November 2021).
- 4 in 5 participants (80%) are confident that the food supply chain in the UK ensures that food is safe to eat. However, only 57% of participants are confident that the food supply chain in the UK provides affordable food options for everyone (November 2021).
- Most participants feel confident that the FSA takes appropriate action if a food-related risk is identified (77%), can be relied upon to protect the public from food-related risks (75%) and is committed to communicating openly with the public about food-related risks (70%).
- Most participants reported that they trust the FSA to do its job (61%), whilst only 5% did not trust the FSA, around a quarter reported that they 'neither trust, nor distrust' the FSA (28%).

Background and Methodology

This report draws data from three key tracking surveys, commissioned by the FSA via Ipsos MORI's online omnibus.

1) **COVID-19 consumer tracker survey** – this monthly tracking survey was established in April 2020 to track behaviour and attitudes towards food purchasing and consumption during the COVID-19 pandemic. Data collection continued on a monthly cycle until October 2021 (Annex 1 provides the data collection period and sample size for each wave[1]). From November 2021, some survey questions were retired whilst others were continued in the FSA's 'Consumer Insights tracking survey' (established in November 2021), which will replace the COVID-19 consumer tracker survey. This report draws upon relevant data across all waves of the COVID-19 consumer tracker.
2) **CO2 shortages weekly consumer survey** – this weekly tracking survey was established at the end of September 2021 to track consumer perceptions, awareness, and concerns in relation to the CO2 shortages in the food industry in addition to other topical issues (such as labour shortages). This survey was commissioned for 6 waves, each one week apart (Annex 2 provides the data collection period and sample size for each wave). Some of the survey questions were retired, whilst others will continue to be monitored in the FSA's 'Consumer Insights tracking survey' (established in November 2021).
3) **Consumer Insights tracking survey** – this survey monitors consumer behaviours and attitudes in relation to food availability, affordability and confidence in the food industry and its regulators. Many of the questions in this tracking survey were previously monitored from the COVID-19 and CO2 shortages tracking surveys (as outlined above). This survey was established in November 2021, with question modules running fortnightly and monthly (Annex 3 provides the data collection period and sample size for each wave). This report summarises findings from the first wave of this survey (at the time of writing this report, only one survey wave is completed).

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[1] A survey 'wave' refers to each repeated survey cycle i.e., a survey with 4 waves has been repeated 4 times.

Each survey outlined above was commissioned with approximately 2,000 adults (aged 16-75), living in England, Wales and Northern Ireland in each wave. The data was weighted to be representative of the adult population aged 16 – 75 living in England, Wales and Northern Ireland on key demographics: age, gender, working status and social grade. The full datasets for each survey are available via the FSA data catalog.

This report only comments on key findings in relation to household food insecurity, consumer concerns, consumer perceptions of the food industry (including food availability) and consumer confidence in the food system and its regulator. The datasets contain further information on other topic areas, including nutrition and food purchasing behaviours, and these will be addressed in future publication reports. In the meantime, the full datasets including demographic comparisons can be accessed in the data tables. A full list of survey questions for each tracker survey are available upon request.

Note on interpreting the data

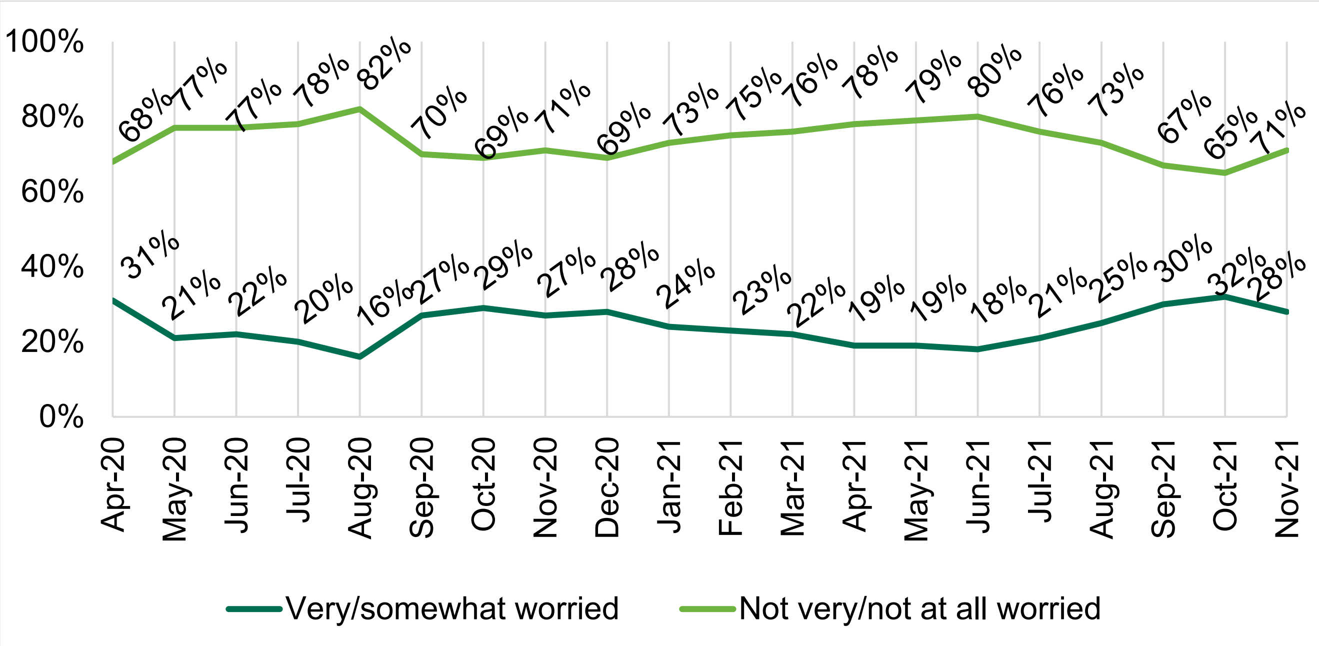
Results should be interpreted with care. All surveys are subject to a range of potential sources of error including sample imbalances which are not easily identified and corrected through weighting. Surveys are also subject to errors in respondents' interpretation of survey questions and response options. The data reported within this report relies on respondents' self-reported behaviours. Errors could occur due to imperfect recollection, or respondents' tendency to overreport behaviours which are perceived as being desirable and underreport undesirable behaviours.

Key findings

Food availability

Over 3 in 10 (31%) of participants reported being worried about food availability in April 2020 when data collection began. As shown in Figure 1, this proportion declined in August 2020 (16%) and in June 2021 (18%). However, worry about food availability has increased significantly since June 2021, reaching a high of 32% in October 2021. The latest figure remains high at 28% in November 2021.

Figure 1: Level of worry about food availability over time (April 2020-November 2021)



COVID-19 Consumer tracker April 2020-October 2021, Consumer insights tracking survey 12-16th November 2021, Online, England, Wales and NI, adults 16-75. Fieldwork dates and sample sizes available in Annex 1 and Annex 3. Values may not add to 100% as ‘don’t know’ and ‘prefer not to answer’ responses are not shown.

When asked about their preferred food products that were unavailable whilst doing their usual food shopping, the latest data shows that most participants (53% in November 2021), had experienced something being unavailable, with the most common items being:

- Fresh vegetables (19%)
- Fresh milk (19%)
- Fresh fruit (18%)
- Bread (18%)

- Frozen foods (18%)

However, most participants who reported an item unavailable were able to find a suitable substitute (65% or above for each individual food item). For example, 87% could find a suitable substitute for fresh vegetables, 82% could find a suitable substitute for fresh milk and 79% could find a suitable substitute for fresh fruit. Figure 2 lists the top 10 items that were reported as ‘unavailable’ in November 2021, and the proportion that were able to find a suitable substitute for the food item.

Figure 2: Reports of food items being unavailable, plus ability to find a suitable substitute for the item (November 2021)

Food item	Proportion* who reported the item as ‘unavailable’ when food shopping	**Proportion who found a ‘suitable substitute’ for the unavailable item
Total (at least one item selected)	53%	-
Fresh vegetables	19%	87%
Fresh milk	19%	82%
Fresh fruit	18%	79%
Bread	18%	86%
Frozen foods	18%	84%
Yoghurts	15%	88%
Eggs	15%	82%
Cheese	15%	91%
Raw red meat e.g., beef, lamb, pork	12%	85%
Raw poultry (e.g. chicken or turkey)	11%	83%

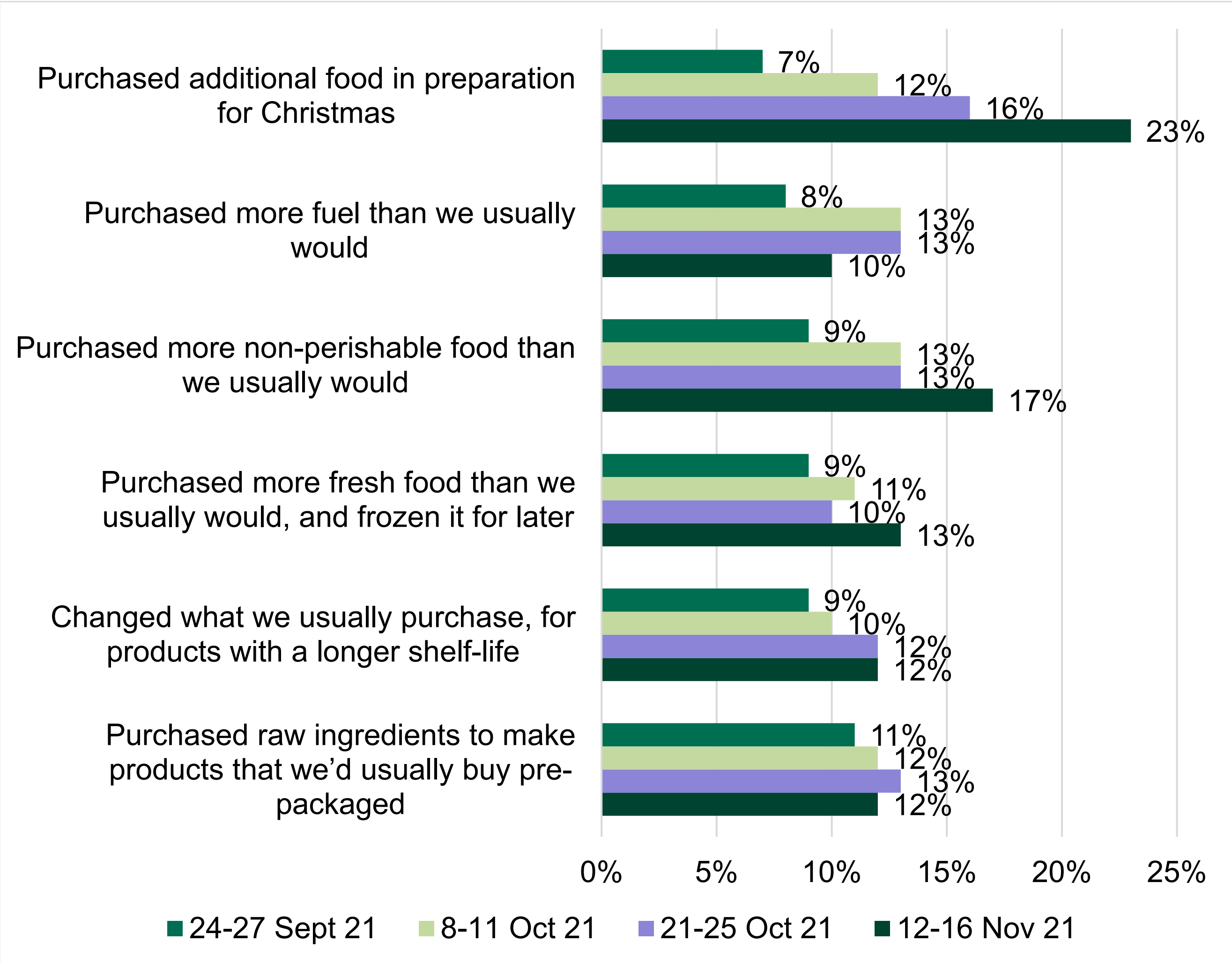
*Proportion is based on the total surveyed population (all participants). **Proportion is based on those who reported the food item as ‘unavailable’

Consumer insights tracking survey 12-16th November 2021, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 3.

Stockpiling and over-purchasing behaviours

Latest data (November 2021) shows that 23% of participants reported purchasing additional food in preparation for Christmas, which has slowly risen from 7% at the end of September (Figure 3). Other food purchasing behaviours have remained broadly stable, although there is an increase in the proportion of respondents who reported purchasing more non-perishable food than usual (17% in November, vs 9% at the end of September). Only 10% of participants reported purchasing more fuel than they usually would in the latest data. Figure 3 provides an overview of this data, where bi-weekly data is shown as a representation of the trends. All other waves of data (weekly) are available for download in the full data tables.

Figure 3: Proportion of participants who reported over-purchasing or stockpiling behaviours

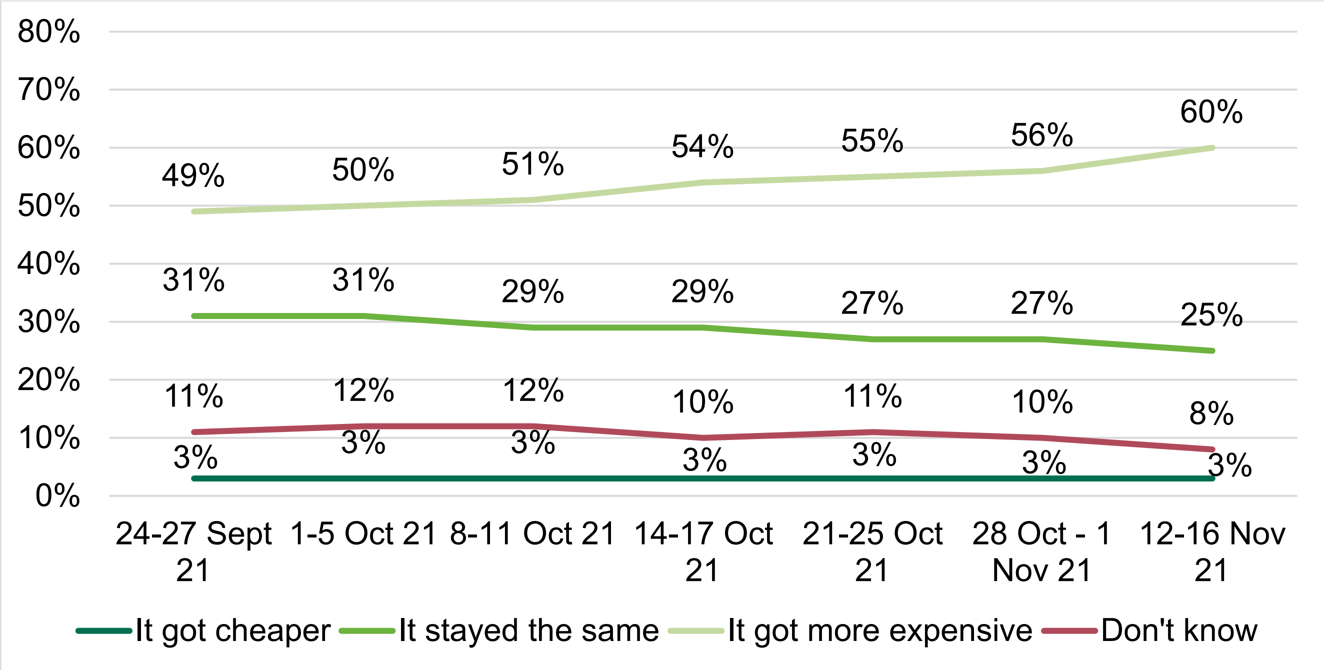


CO2 shortages weekly consumer survey, 24th September – 1st November 2021, Consumer insights tracking survey12-16th November 2021, Online, England, Wales and NI, adults 16-75. Every other wave of this data is shown for comparison purposes – all waves (weekly data) is available in the full data tables. Fieldwork dates and sample sizes available in Annex 2 and Annex 3.

Food affordability, food prices and food insecurity

3 in 5 participants (60%, November 2021) believed that their food shopping had got more expensive in the past week, this proportion has gradually increased since the end of September (49%). In every wave, only 3% of participants thought that their food shopping had got cheaper (Figure 4).

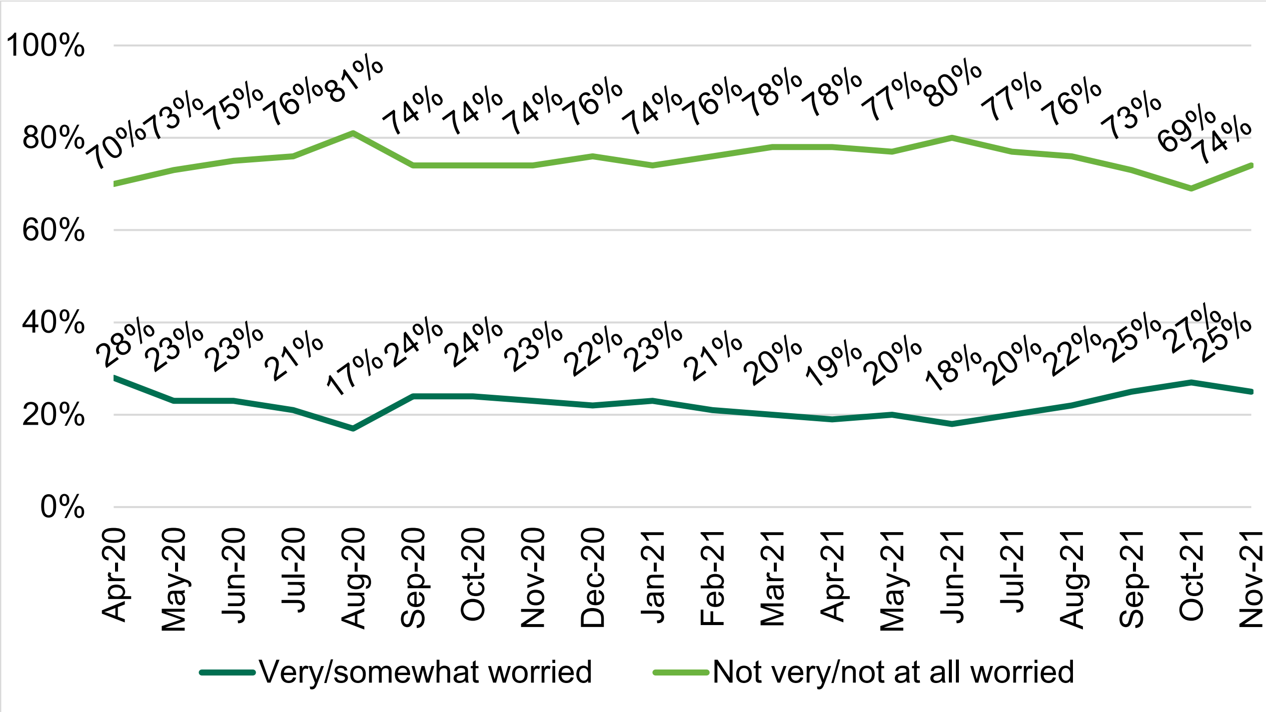
Figure 4: Noted changes in food prices overtime



CO2 shortages weekly consumer survey, 24th September – 1st November 2021, Consumer insights tracking survey 12-16th November 2021, Online, England, Wales and NI, adults 16-75. Fieldwork dates and sample sizes available in Annex 2 and Annex 3. Values may not add to 100% as 'I haven't done any food shopping in the past week' responses are not shown.

Participant's worries about food affordability have fluctuated since tracking began. In April 2020 (during the first UK COVID-19 national lockdown), 28% of participants reported being worried about food affordability. Although this figure declined significantly in August 2020 (17%) and June 2021 (18%), the more recent trend shows that the proportion of participants who are worried about food affordability has risen and are almost as high now as they were in April 2020 (27% in October 2021 and 25% in November 2021 compared with 28% in April 2020) (Figure 5).

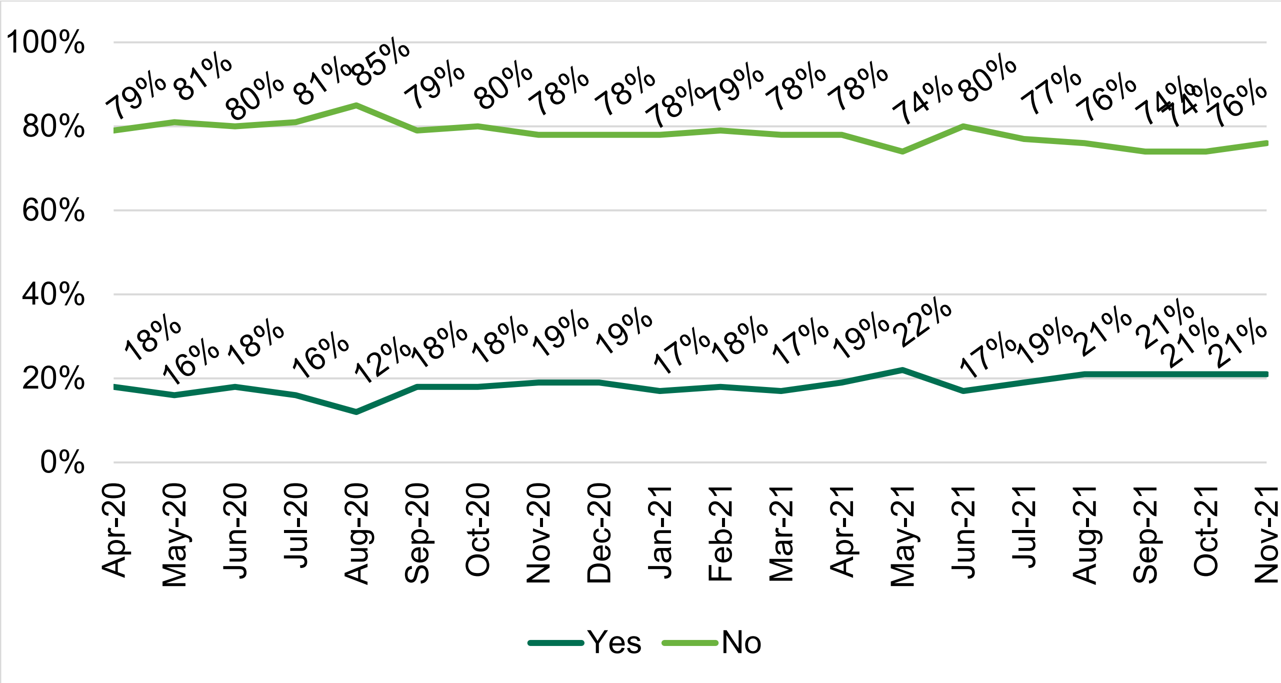
Figure 5: Levels of concern about food affordability over time (April 2020 – November 2021)



COVID-19 Consumer tracker April 2020-October 2021, Consumer insights tracking survey 12-16th November 2021, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 1 and Annex 3. Values may not add to 100% as 'don't know' and 'prefer not to answer' responses are not shown.

Other related measures of food insecurity follow a similar trend, including reports of cutting down the size of meals/skipping meals for financial reasons (Figure 6) and reported use of food banks (Figure 7). The proportion of participants who reported cutting down the size of meals or skipping meals because they could not afford to buy food was 18% in April 2020 (during the first UK COVID-19 national lockdown). Since January 2021 at least 17% of respondents, have reported skipping meals or cutting down the size of their meals because they did not have enough money to buy food. This proportion rose to 22% in May 2021 and is currently at 21% in November 2021; higher now, than during the first UK lockdown.

Figure 6: Reports of skipping meals or cutting the size of meals (for financial reasons) ‘at least once’ or more in the month prior (April 2020 – November 2021)



COVID-19 Consumer tracker April 2020-October 2021, Consumer insights tracking survey 12-16th November 2021, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 1 and Annex 3. Values may not add to 100% as ‘don’t know/can’t remember’ and ‘prefer not to answer’ responses are not shown.

Data also shows that younger age groups, households with children, and larger households are more likely to report skipping meals or cutting down the size of meals for financial reasons. This is a consistent finding across all waves. Table 1 provides an overview of this data, where every 4th wave of data is shown as a representation (April, July, November, and March in 2020 and 2021). All other months are available for download in the full data tables.

Table 1: Demographic comparison of participants who reported cutting down the size of meals or skipping meals for financial reasons (April 2020, July 2020, November 2020, March 2021, July 2021 and November 2021)

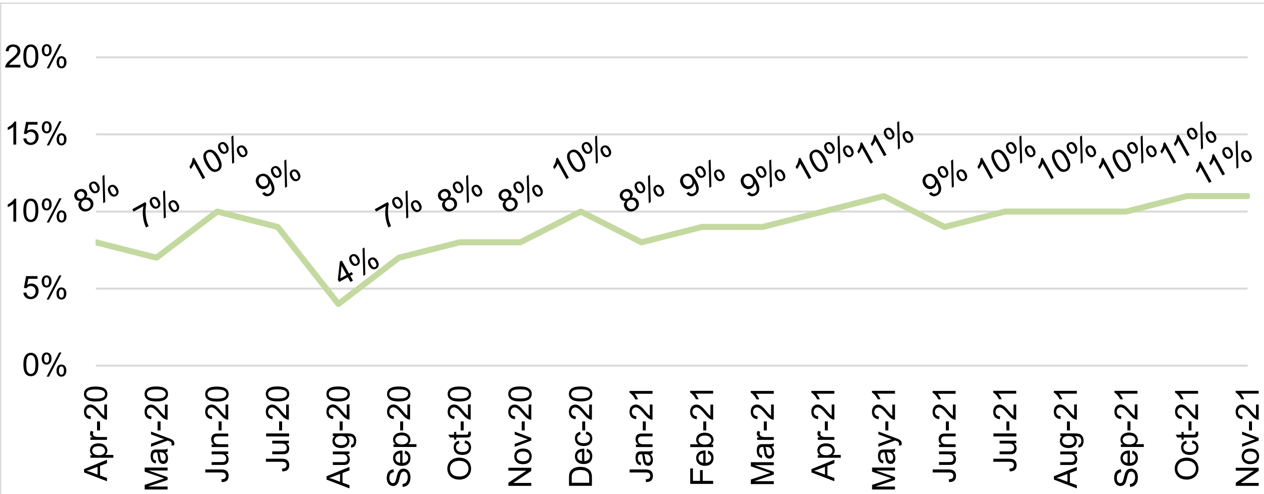
Month of data collection	All (total survey population)	16–24-year-olds	Larger households (4+)	Households with children
April 20	18%	35%	21%	28%
July 2020	16%	29%	21%	26%
November 2020	19%	38%	25%	29%

March 2021	17%	34%	23%	25%
July 2021	19%	39%	26%	32%
November 2021	21%	44%	30%	33%

COVID-19 Consumer tracker April 2020-October 2021, Consumer insights tracking survey 12-16th November 2021, Online, England, Wales and NI, adults 16-75. Fieldwork dates in Annex 1 and Annex 3. Indicative base sizes in November 2021: 16-24 (313), households with children (635), larger households (4+) (491).

Reported use of food banks follow a similar trend. In April 2020 (during the first UK COVID-19 national lockdown), 8% of respondents reported using food banks to have food delivered to their house. This proportion dipped to just 4% in August 2020 but has consistently remained between 9% and 11% since February 2021. In November 2021 11% reported using food banks; a higher proportion than was reported in April 2020 (8%)[2].

Figure 7: Reported use of food banks overtime



COVID-19 Consumer tracker April 2020-October 2021, Consumer insights tracking survey 12-16th November 2021, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 1 and Annex 3

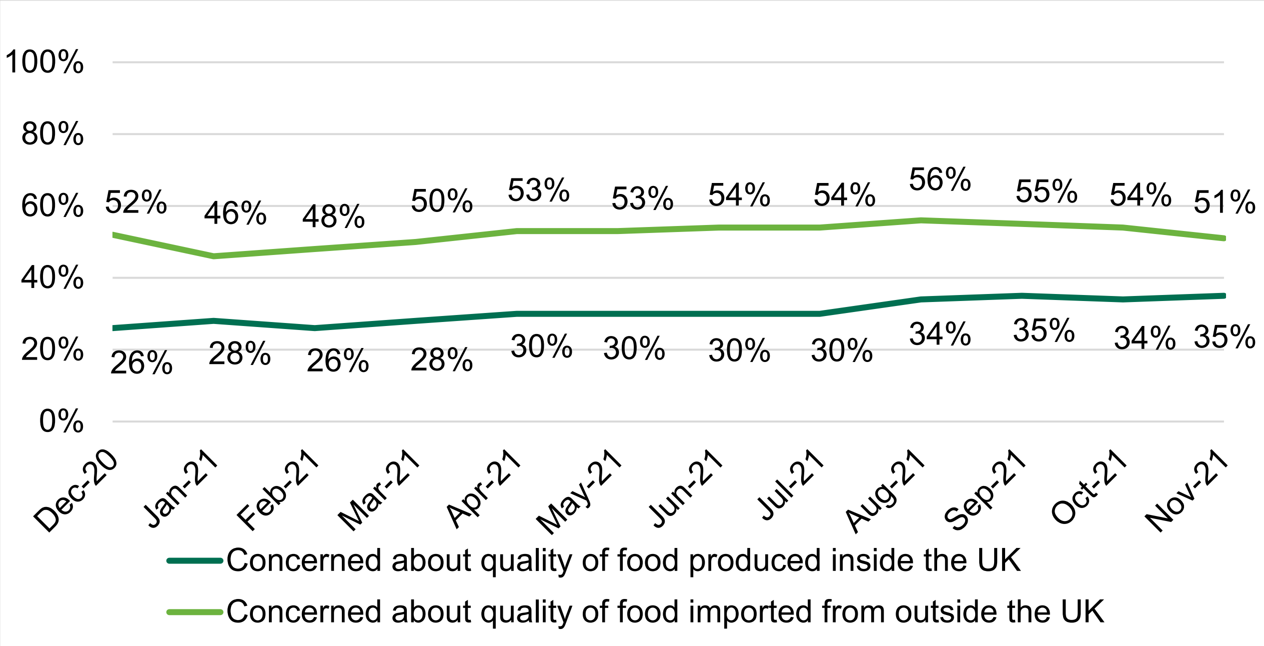
[2] In November 2021, the phrasing of this question changed. From April 2020 to October 2021, the question was 'In the last month, how often, if at all, have you arranged for food to be delivered to your house in the following ways? A) Through a food sharing app (e.g. Olio) B) Through a government or local authority scheme C) Through a food charity or food bank'. In November 2021, the question was simplified to 'In the last month, how often, if at all, have you used a food charity or food bank?'. Results are consistent from October to November 2021, which indicates the change to phrasing had minimal impact on the result.

Concerns about the food industry

In December 2020[3], 26% of respondents reported feeling concerned about the quality of food produced inside the UK. This proportion has gradually increased overtime, and the latest figure (November 2021) shows that over a third of participants (35%) are concerned about the quality of food produced in the UK (Figure 8).

The proportion of respondents concerned about the quality of food imported from outside the UK has always been significantly higher than those who report concern about the quality of food produced inside the UK. In December 2020, 52% reported concern about the quality of food imported from outside the UK, and although this has fluctuated overtime, the trend has remained broadly stable since April 2021 (currently 51% in November 2021). This figure was lowest in January 2021 (46%), but highest in August 2021 (56%) (Figure 8).

Figure 8: Participants who report being 'highly' or 'somewhat' concerned about the quality of food produced inside the UK or food imported from outside the UK



COVID-19 Consumer tracker April 2020-October 2021, Consumer insights tracking survey 12-16th November 2021, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 1 and Annex 3

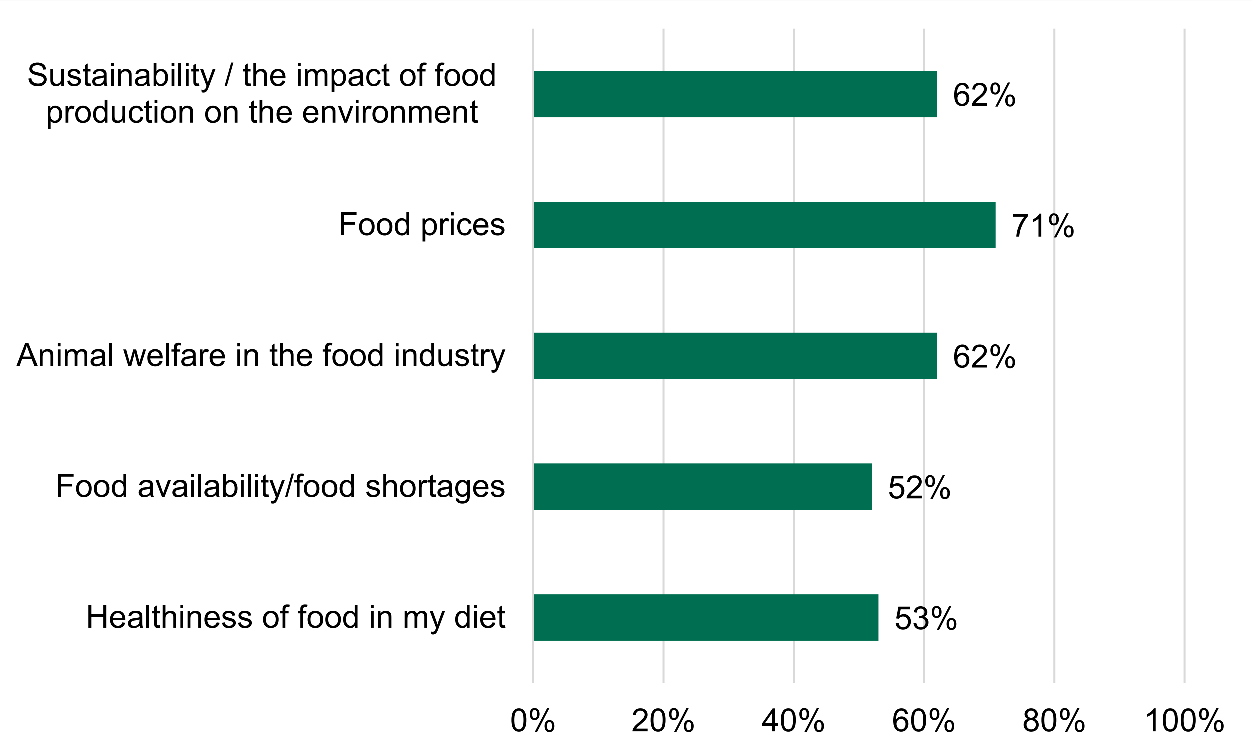
In November 2021, participants were also asked about their level of concern about the safety of food produced in the UK, and of food imported from outside the UK. The findings are very similar to the level of concern about food quality (Figure 8). Half (51%)

[3] Data collection began in December 2020 for this survey question.

reported feeling concerned about the safety of food imported from outside the UK, and 33% reported concern about the safety of food produced in the UK.

When asked about other food industry concerns, 71% of participants reported that they were ‘highly’ or ‘somewhat’ concerned about food prices (November 2021); this is by far the highest rated concern (based on the prompted list). In comparison, over 3 in 5 participants reported feeling concerned about the impact of food production on the environment (sustainability) and animal welfare in the food industry (both 62%). Fewer participants reported concern about ‘food shortages’ (52%) and ‘the healthiness of personal diet’ (53%), but this was still over half of those surveyed (Figure 9).

Figure 9: Participants who reported feeling ‘highly’ or ‘somewhat’ concerned about the food industry (November 2021)

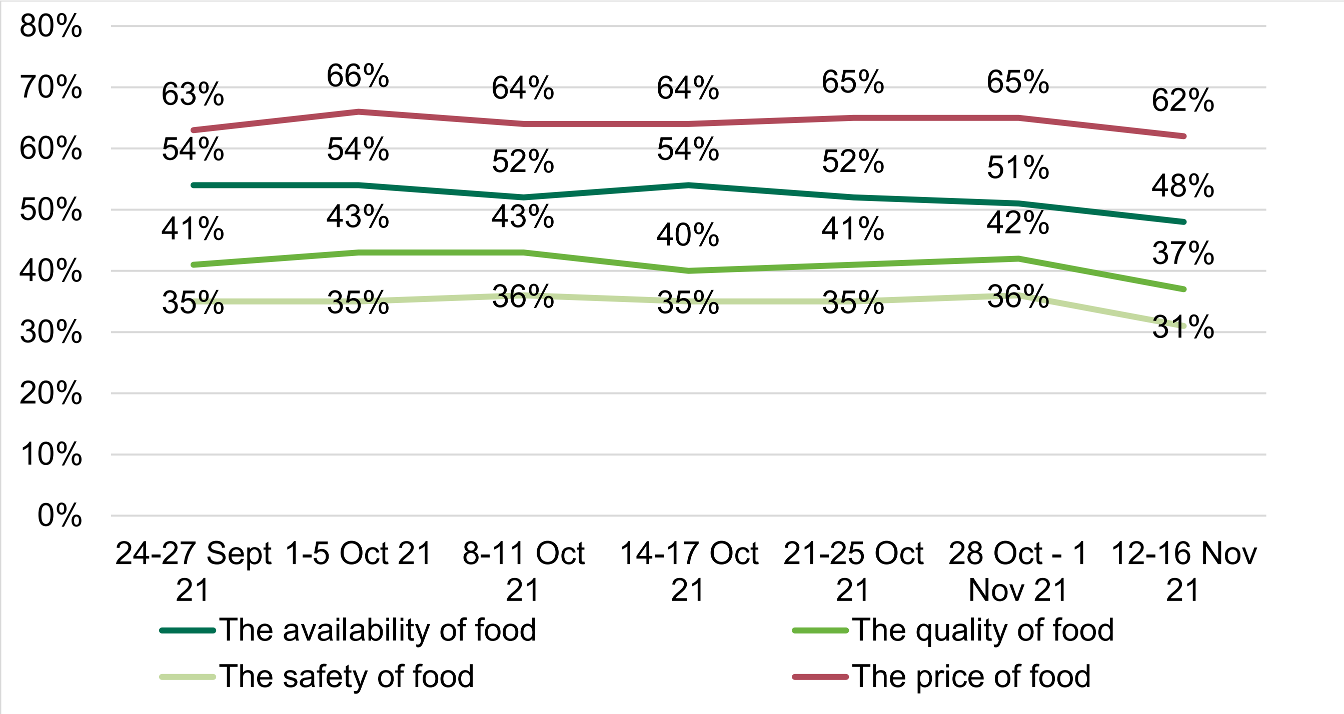


Consumer insights tracking survey 12-16th November 2021, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 3.

Concerns about Christmas and New Year

Our latest data (November 2021) shows that participants are most concerned about the price of food (62%) and the availability of food (48%) in relation to the upcoming Christmas and New Year. Concern about the quality (37%) and safety of food (31%) is significantly lower, although this still represents a sizable proportion of participants. The trend overtime is broadly stable for each of these concerns (Figure 10).

Figure 10: Participants who reported being ‘highly’ or ‘somewhat’ concerned about food for Christmas and New Year



CO2 shortages weekly consumer survey, 24th September – 1st November 2021, Consumer insights tracking survey 12-16th November 2021, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 2 and Annex 3.

Participants in younger age groups (aged 16-24 and 25-34) are significantly more likely to report concern about safety, availability, and quality of food at Christmas/New Year. Participants aged 25-34 are also significantly more likely to report concern about the price of food at Christmas/New Year. Table 2 outlines these differences for November 2021; however, the differences are apparent in all survey waves.

Table 2: Participants who reported being ‘highly’ or ‘somewhat’ concerned about Christmas/New Year; 16–24- and 25–34-year-olds compared to the total surveyed population (November 2021)

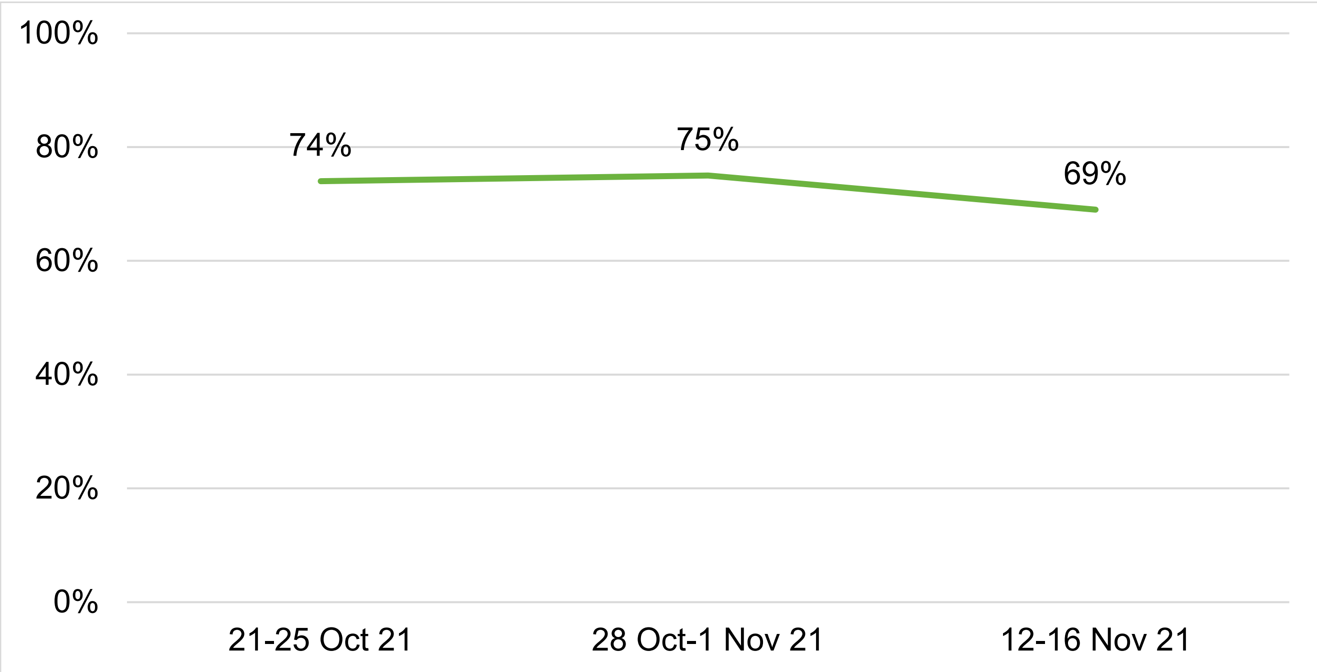
Topic	All (total survey population)	16–24-year-olds	25–34-year-olds
‘Concerned’ about food availability	48%	57%	65%
‘Concerned’ about food safety	31%	43%	42%
‘Concerned’ about food quality	37%	49%	50%
‘Concerned’ about food price	62%	57%*	69%

Consumer insights tracking survey 12-16th November 2021, Online, England, Wales and NI, adults 16-24 (n=313). Fieldwork dates in Annex 3. Values marked with * were not statistically significant from the total survey sample.

Confidence in the food supply chain

69% of participants reported feeling confident in the food supply chain (November 2021), this is a slightly decline since the previous wave at the end of October. However, given the small number of waves so far, it is not yet possible to determine whether this fall in confidence represents a longer-term trend (Figure 11).

Figure 11: Participants who reported being 'very' or 'fairly' confident in the food supply chain



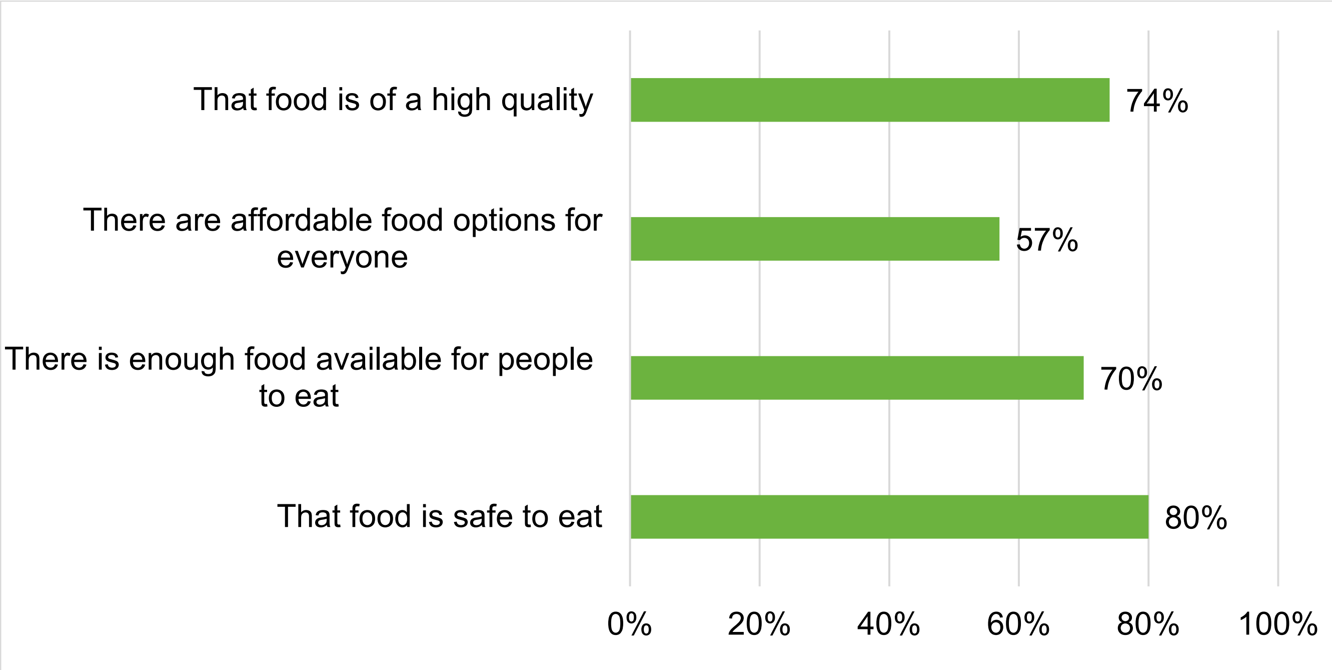
CO2 shortages weekly consumer survey, 24th September – 1st November 2021, Consumer insights tracking survey 12-16th November 2021, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 2 and Annex 3.

In November 2021, participants were also asked for the first time, about their confidence in the food supply chain to ensure:

- That food is safe to eat
- There is enough food available for people to eat
- There are affordable food options for everyone
- That food is of a high quality

These findings show that 4 in 5 participants (80%) are confident that those involved in the food supply chain in the UK ensure that food is safe to eat. 70% of participants are confident that the food supply chain in the UK provides enough food for people to eat, and 74% are confident that the food supply chain provides food that is of a high quality. However, a smaller proportion of participants (57%) are confident that the food supply chain in the UK provides affordable food options for everyone (Figure 12).

Figure 12: Participants who reported being 'very' or 'fairly' confident in the food supply chain with regards to food safety, food availability, food affordability and food quality (November 2021).



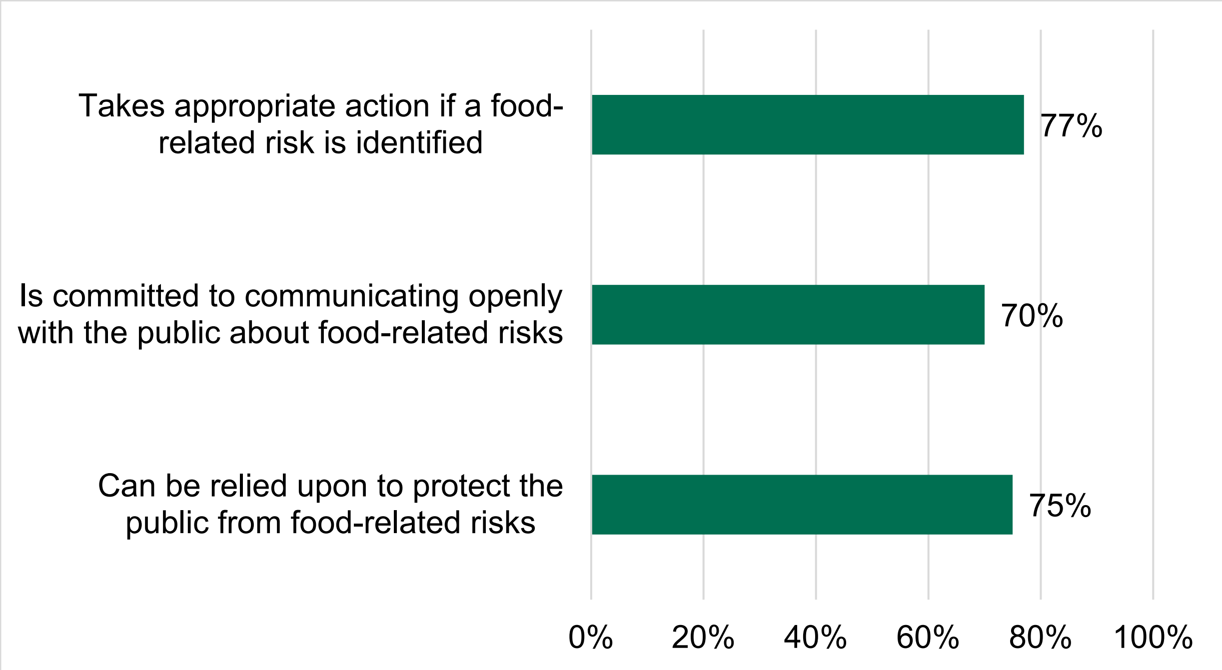
Consumer insights tracking survey 12-16th November 2021, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 3.

Confidence and trust in the FSA

In November 2021, participants were also asked about their confidence in the FSA as a food regulator. As illustrated in Figure 13, most participants feel confident that the FSA:

- Can be relied upon to protect the public from food-related risks (75%)
- Is committed to communicating openly with the public about food-related risks (70%)
- Takes appropriate action if a food-related risk is identified (77%)

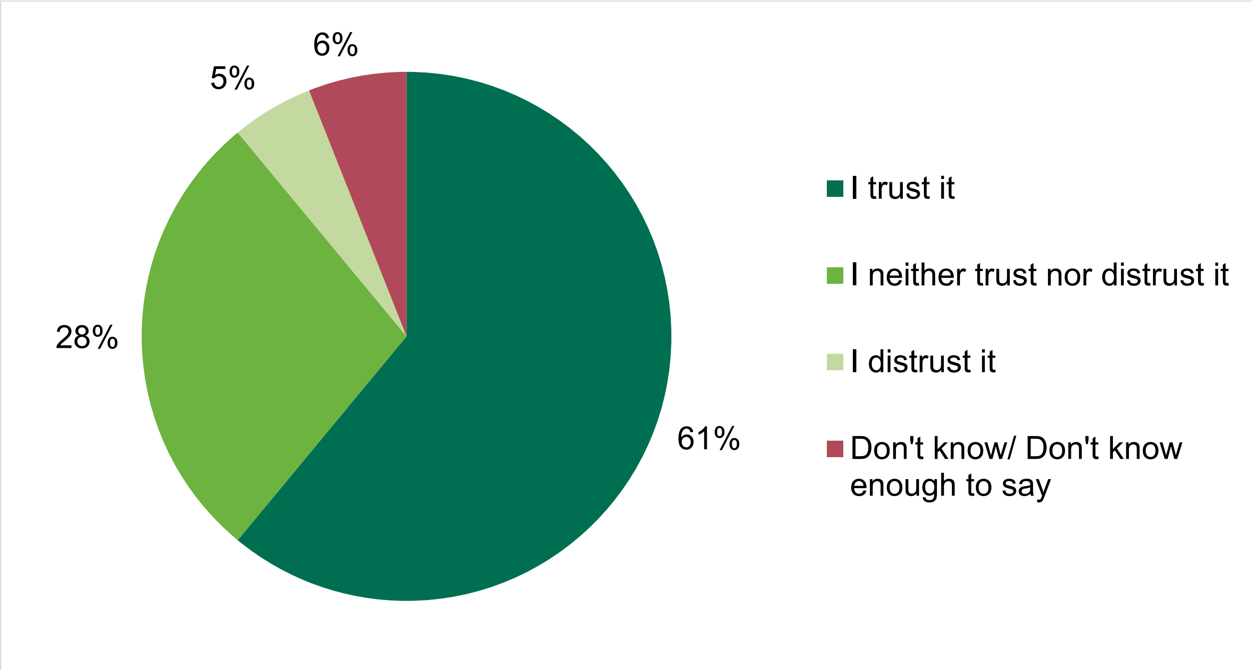
Figure 13: Confidence in the FSA (% reported being ‘very’ or ‘fairly’ confident)



Consumer insights tracking survey 12-16th November 2021, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 3.

In November 2021, participants were also asked how much they trust or distrust the FSA to do its job (that is, to ‘make sure that food is safe and what it says it is’). Most participants said that they trust the FSA to do its job (61%), whilst only 5% did not trust the FSA. Over a quarter of participants (28%) said that they ‘neither trust, nor distrust’ the FSA (Figure 14).

Figure 14: Participants who trust/distrust the FSA to 'make sure food is safe and is what it says it is'



Consumer insights tracking survey 12-16th November 2021, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 3.

Annex

Annex 1: Fieldwork dates and sample sizes – COVID-19 consumer tracker survey

Wave	Fieldwork dates	Sample size
1	10-13 April 2020	2,039
2	8-12 May 2020	2,040
3	12-15 June 2020	2,045
4	10-14 July 2020	2,068
5	14-17 August 2020	2,071
6	18-21 September 2020	2,065
7	16-20 October 2020	2,067
8	13-16 November 2020	2,023
9	11-15 December 2020	2,073
10	15-18 January 2021	2,131
11	12-15 February 2021	2,047
12	12-15 March 2021	2,013
13	16-19 April 2021	2,049
14	14-18 May 2021	2,043
15	11-14 June 2021	2,047
16	16-19 July 2021	2,051
17	13-17 August 2021	2,065
18	13-15 September 2021	2,064
19	15-18 October 2021	2,059

Annex 2: Fieldwork dates and sample sizes – CO_2 shortages weekly consumer survey

Wave	Fieldwork dates	Sample size
1	24-27 September 2021	2,062
2	1-5 October 2021	2,030
3	8- 11 October 2021	2,054
4	14-17 October 2021	2,036
5	21-25 October 2021	2,054
6	28 October – 1 November 2021	2,024

Annex 3: Fieldwork dates and sample sizes – Consumer insights tracker survey

Note: At the time of writing, only one survey wave was available.

Wave	Fieldwork dates	Sample size
1	12-16th Nov 2021	2,046

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