Consumer Insights Tracker Report July 2023 - March 2024: Introduction

Introduction

Background

The Consumer Insights Tracker is the FSA’s monthly survey that monitors changes in consumers’ behaviour and attitudes, and key issues in relation to food. The survey covers a range of food-related topics that are of strategic interest to the FSA. This includes consumers’ concerns about food-related issues, perceptions of the food supply chain, and attitudes and behaviours relating to food affordability and availability.

The FSA have been conducting monthly surveys with consumers since April 2020, when the FSA established the COVID-19 Tracker to monitor consumers’ attitudes and behaviour during the COVID-19 pandemic. This survey was designed to provide more regular and timely insights than the FSA’s biannual official statistic survey, Food and You 2 (F&Y2). In April 2022, the survey was renamed the Consumer Insights Tracker.

YouGov were appointed as the supplier of the Consumer Insights Tracker from July 2023. This report details findings from the 9-month tracking period between July 2023 and March 2024. Where relevant, comparisons are made to Food and You 2, as well as the previous Consumer Insights Tracker which ran from April 2022 to June 2023 (footnote 1).

Wider context

The period during which this survey took place coincides with an ongoing cost-of-living crisis in England, Wales and Northern Ireland. The cost of living has risen both in the UK and across the world since 2022. This has been driven by a range of factors, including the conflict in Ukraine and ongoing recovery from the COVID-19 pandemic.

Consumer price inflation averaged 5.2% in the first seven months of the tracking period (July 2023 – January 2024), while food price inflation was more than double that figure, at 10.7%. While the latter figure has been trending downwards, falling in each month from a peak of 19.2% in March 2023 to 4% in March 2024, it remains well above historical averages.

An additional cause of the crisis is the rise in energy bills, with an average UK household’s domestic energy bill rising to £2,592 in 2023, 13% higher than in 2022 and almost double what it was in 2021. The crisis has resulted in a 600,000 increase in those in absolute poverty (after housing costs) in the year 22/23.

Another key development relating to the wider food system is the growing discussion around ultra-processed foods (UPFs). These foods include cereals, biscuits, ham, sausages, bread and crisps (amongst others) (footnote 2). There has been a variety of media coverage on this topic debating their impact on health and nutrition, including a BBC Panorama documentary which aired in June 2023. The FSA published consumer information on UPFs in May 2024.

Method

Fieldwork for this online survey is carried out monthly among a representative sample of approximately 2,000 people aged 16+ living in England, Wales and Northern Ireland. All respondents who take part in the survey are drawn from the YouGov panel of over 400,000 active panel members who live in the UK.

The sampling approach used is quota sampling, with quotas taken from the 2021 Census. The sample for each wave is representative of the England, Wales and Northern Ireland population by the following variables: age, gender, social grade, region and education level. A sample boost is also applied in Northern Ireland (achieving 100 respondents each month), to improve the representation of this group and to enable rudimentary demographic comparisons between countries. Once fieldwork has been completed, weighting is applied so that the sample more accurately reflects the demographics of the target population.

Full details of the methodology used for the Consumer Insights Tracker can be found in the Technical Report.

Notes for interpretation

Data in this report comes from March 2024 unless specified, with a sample size of 2,015. In certain incidences, data is reported based on the first three months of 2024 combined, in order to facilitate analysis with greater sample sizes. The sample size in this case is 6,119.

Throughout the report, results are reported for each topic at the overall level, before differences across key demographic groups and changes over time are noted. Changes over time, or between demographic groups, are only reported when they are statistically significant using t-tests at $p<0.05$. This helps to ensure that only ‘true’ shifts in behaviour and attitudes are focused on in the report (i.e. they are less than 5% likely to be a result of chance). Key demographic variables analysed throughout this report include gender, age, ethnicity, region, whether there is a child aged under 18 living in the household, household size, whether the person is limited by a health condition or disability and the Index of Multiple Deprivation (IMD) decile (see further information in the Annex).

It should also be noted that there are some limitations of the online methodology used as part of this survey. For example, panel members on opt-in panels may be more engaged in current issues, which means they are more motivated to opt-into panel surveys. This means measures for some attitudes and behaviours may not truly reflect the total population. Additionally, some groups are underrepresented in online opt-in panels, for example those who do not have internet access or who are not comfortable going online, who also tend to be older and in lower socio-economic groups.

YouGov’s large nationwide panel which the survey sample is drawn from acts to mitigate these impacts, by enabling data to be gathered that is representative of the population in England, Wales and Northern Ireland across a range of demographic characteristics. In addition, the online methodology helps to reduce certain forms of bias (such as social desirability bias) compared to alternative survey methods, which can ensure that results better reflect people’s true behaviours and beliefs.

Further information about the research strengths and limitations are available in the Technical Report.

1. Note that due to differences in methodology across the various surveys, any comparisons are indicative only.

2. For further details on ultra-processed foods, please see page 10 onwards.