Consumer insights tracker report: key findings from December 2021 to March 2022

Area of research interest: Emerging challenges and opportunities
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Executive Summary

This publication provides a summary of the Food Standards Agency's (FSA) latest consumer insights tracker data, which includes the following topics:

- Household food insecurity
- Consumer perceptions of food availability
- Consumer concerns in relation to food
- Consumer confidence in the food supply chain and the FSA

The data captured within this report is drawn from various tracking surveys commissioned by the FSA, via Ipsos', from April 2020 until March 2022. The previous publication focused on data collected between April 2020 and November 2021, so this report provides commentary on the latest data from the 2021-22 winter period (December 2021 to March 2022).

Key findings from this report are:

Food affordability, food prices and food insecurity

- the proportion of participants who were worried about food affordability was 31% in March 2022; the highest reported figure, and a statistically significant increase compared to April 2020, when tracking began (28%), and compared to the beginning of the winter period (24% in December 2021).
- over one in five participants (22%) reported cutting down the size of their meals or skipping meals because they could not afford to buy food in March 2022. This proportion has remained relatively stable over the recent winter period (22% in both December and March 2022) but was significantly higher than the previous winter (19% in December 2020 to 17% in March 2021), and significantly higher than when tracking first began in April 2020 (18%).
- in March 2022, 15% of participants reported using a food bank or food charity to access food. This is the highest proportion, and a statistically significant increase, since tracking began in April 2020 (8%). Although the reported use of food banks/food charities has remained stable over the recent winter period (14% in December 2021, 15% in March 2022), there has been a significant increase since the previous winter (10% in December 2020 and 9% in March 2021).
- the proportion of participants who believe their food shopping had got more expensive has risen significantly since tracking began in September 2021 (49%), as nearly three-quarters reported that the cost of their food shopping had got 'more expensive' in March 2022 (74%).

Food availability

- reported concern around food availability was highest in October 2021 (32%) but has remained broadly stable over the recent winter period (from 28% in December 2021 to 29% in March 2022)
- the proportion of participants experiencing unavailable food items has slowly decreased since January 2022. In March 2022, the most common items that were reported as 'unavailable' were:

o Fresh milk (17%), however 88% of these participants were able to find a suitable substitute
o Fresh fruit (17%), however 85% of these participants were able to find a suitable substitute
o Bread (17%), however 91% of these participants were able to find a suitable substitute
o Fresh vegetables (16%), however 84% of these participants were able to find a suitable substitute
o Frozen foods (15%), however 88% of these participants were able to find a suitable substitute

- most 'over-purchasing' or 'stockpiling' behaviours significantly increased between September 2020 (when tracking of these specific behaviours began) and February 2022 where they peaked, before declining slightly in March 2022. The main exception to this trend is participants who reported 'Purchasing more fuel than we usually would'; this proportion increased between September 2021 (8%) and October (12%), then remained relatively stable until March 2022, when it increased significantly to 15% (was 10% in February 2022).

Concerns about the food industry

- the proportion of consumers who reported feeling concerned about 'food prices' has significantly increased overtime; from 71% in November 2021 to 81% in March 2022.
- other monitored concerns have remained broadly stable over the winter period (December 2021 to March 2022), but over half of consumers reported concern about the following issues in March 2022:

o Animal welfare in the food industry (57%)
o Sustainability / the impact of food production on the environment (56%)
o Food availability/food shortages (55%)
o The 'healthiness' of food in my diet (52%)

- approximately half of consumers were concerned about the quality (50%), and the safety (49%) of food imported from outside the UK. Significantly less were concerned about the quality (36%) and safety (36%) of food produced in the UK
- Concerns around Christmas and New year (data gathered between September 2021 and December 2021)
- data from late December shows 7 in 10 participants were concerned about the price of food (70%) and half of participants (51%) were concerned about the availability of food for Christmas and New Year
- just over one-third of participants (36%) were concerned about food safety in relation to Christmas and New Year in late December 2021; a broadly consistent figure since tracking began in September 2021
-

Confidence in the food supply chain

- latest figures show that only 56% of participants were confident that that the food supply chain in the UK ensures that there are affordable food options for everyone (March 2022)
- in March 2022, 4 in 5 participants (79%) were confident that those involved in the food supply chain in the UK ensure that food is safe to eat whilst three-quarters (75%) were confident that food is of a high quality. These figures are stable across all reported waves

- 69% of participants reported feeling confident in the food supply chain overall in March 2022. A figure that has remained broadly stable since mid-November 2021.

Perceptions of the FSA

- since November 2021, the proportion of participants stating they trust the FSA to do its job has remained stable (61% in mid-November 2021, 63% in March 2022)
- confidence in the FSA remains stable across all measures between November 2021 and March 2022. For example, in March 2022 most participants felt confident that the FSA:

o Can be relied upon to protect the public from food-related risks (75%)
o Is committed to communicating openly with the public about food-related risks (69%)
o Takes appropriate action if a food-related risk is identified (76%)

Food safety behaviours

- the proportions of participants who reported eating milk, cheese, cooked meats, smoked fish and bagged salad past the use-by date has remained stable when compared to the average figures across the previous 12-month period. However, since tracking began in July 2020, there has been a gradual increase in the proportion of participants who reported eating these foods past the use-by date; a trend also noted in the FSA's previous COVID-19 tracker report
- participants who reported skipping or cutting down the size of meals for financial reasons (because they could not afford to buy food) were significantly more likely to report eating milk, cheese, smoked fish, bagged salad and cooked meats past the use-by date than participants who did not skip or cut down their meals. This finding has been noted in previous COVID-19 tracker publications and has been a consistent finding across all available waves of data (July 2020 – March 2022).

Background

The purpose of the consumer insights tracking survey is to provide frequent monitoring of consumer behaviour and attitudes towards food insecurity, food availability, concerns in relation to food, confidence in the food supply chain and confidence in the FSA.
Although longer term trends can be monitored in our flagship Food and You 2 survey (which offers a more robust methodology), the consumer insights tracker offers more regular (monthly) monitoring of key issues that impact consumers. The key differences between these two surveys are outlined in Table 1.

Table 1: Key differences between consumer insight tracker survey and Food and You 2 survey

Difference	Food and You 2	Consumer Insights tracker
Sample size	Approximately 6,000	Approximately 2,000

Difference	Food and You 2	Consumer Insights tracker
Sampling approach	Random probability sampling using postal address file (PAF)	Quota sampling from an online panel - An elimination rule is applied to the online omnibus so that participants will not be invited to complete consecutive surveys.
Mode	Push-to-web (online, with postal option)	Online only
Frequency	Biannually	Monthly (was fortnightly between November 2021 and January 2022)
Representation	Nationally representative of England, Wales and Northern Ireland with boosted samples in Wales and Northern Ireland	Nationally representative of England, Wales and Northern Ireland
Topics Captured	Food safety in the home, food shopping, eating out, food allergy (including intolerance, and other hypersensitivities), food security, concerns about food, and trust in the FSA and food supply chain	Food security, food availability, concerns in relation to food, confidence in the food supply chain and confidence/trust in the FSA
Cognitively tested questions?	Yes, cognitive testing on some survey questions	No
Beginning of timeseries	July 2020 - Fieldwork conducted between July 2020 and October 2020	April 2020 (question dependent)

Methodology

This report draws on data from three key tracking surveys, commissioned by the FSA via Ipsos' 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 of the survey), and publication reports are published on the FSA website. From November 2021, some survey questions from the COVID-19 tracker survey were retired whilst others were

continued in the FSA's 'Consumer Insights tracking survey' (established in November 2021), which replaced 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 monitor 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 were continued in the FSA's 'Consumer Insights tracking survey' (established in November 2021).
3. **Consumer Insights tracking survey** – this survey was established in November 2021, to monitor consumer behaviours and attitudes in relation to food availability, affordability and confidence in the food industry and the FSA (annex 3 provides the data collection period and sample size for each wave). Many of the questions in this tracking survey were previously monitored from the COVID-19 and CO2 shortages tracking surveys (as outlined above), which allows the timeseries to continue. This report summarises findings from December 2021 to March 2022 (a full list of survey questions is provided in Annex 4). Between November 2021 and January 2022 data was captured every fortnight, but the survey moved to a monthly collection cycle from February 2022 onwards.

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. An elimination rule is applied to the online omnibus so that participants will not be invited to complete consecutive surveys. For example, in a monthly survey participants would be eliminated from the sample if they had completed the survey in the month prior. In fortnightly surveys, participants would be eliminated from the sample if they had completed either of the previous two waves of the survey. The full datasets for each survey, including demographic breaks, are available via the FSA data catalogue .

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 participants' interpretation of survey questions and response options.

The data included within this report relies on participants' self-reported behaviours. Errors could occur due to imperfect recollection, or participants' tendency to overreport behaviours which are perceived as being desirable and underreport undesirable behaviours.
Demographic commentary is provided where this additional commentary is of particular interest for the FSA and its audiences. For some sections, demographic commentary has not been included to limit the length of this report. Unless stated otherwise, where comparisons are made in the text between different demographic groups, only those differences found to be statistically significant at the 5% level are reported. In other words, differences reported have no more than a five per cent probability of occurring by chance. The relationship between survey findings and different types of participants were investigated using chi-square tests of association.

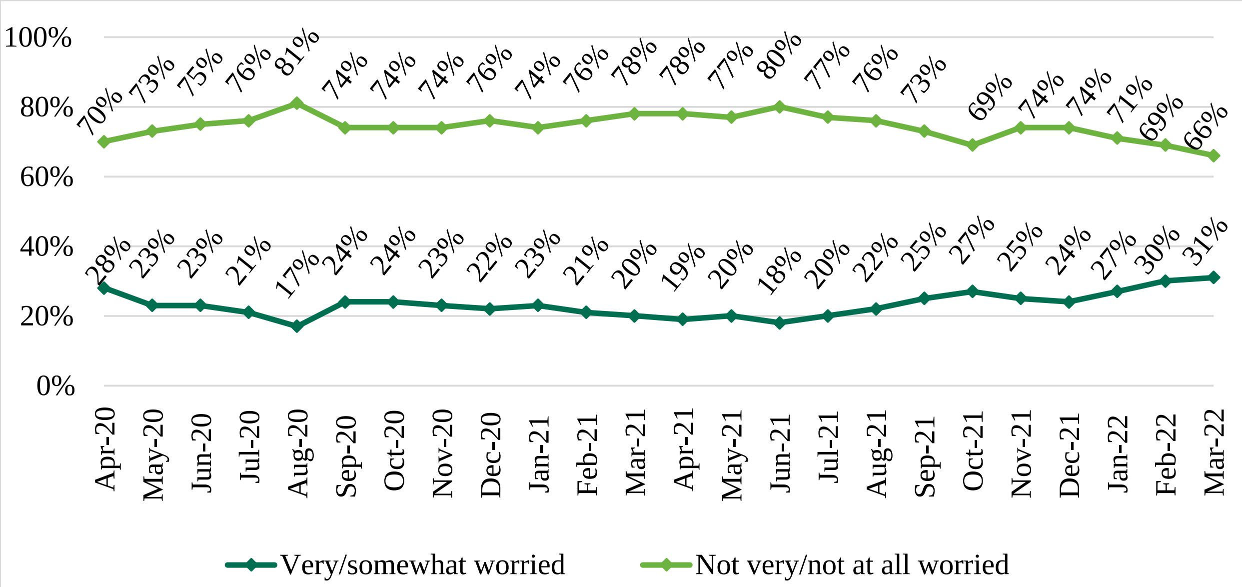
Key Findings

Food affordability, food prices and food insecurity

Consumer concerns about food affordability

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%), in March 2022 the proportion of participants who reported feeling worried about food affordability rose to 31%; the highest proportion, and a significant increase, since tracking began. March 2022 (31%) is also a significant increase since the beginning of the winter period (24% in December 2021) (Figure 1).

Figure 1: Levels of worry about food affordability over time (April 2020 – March 2022)



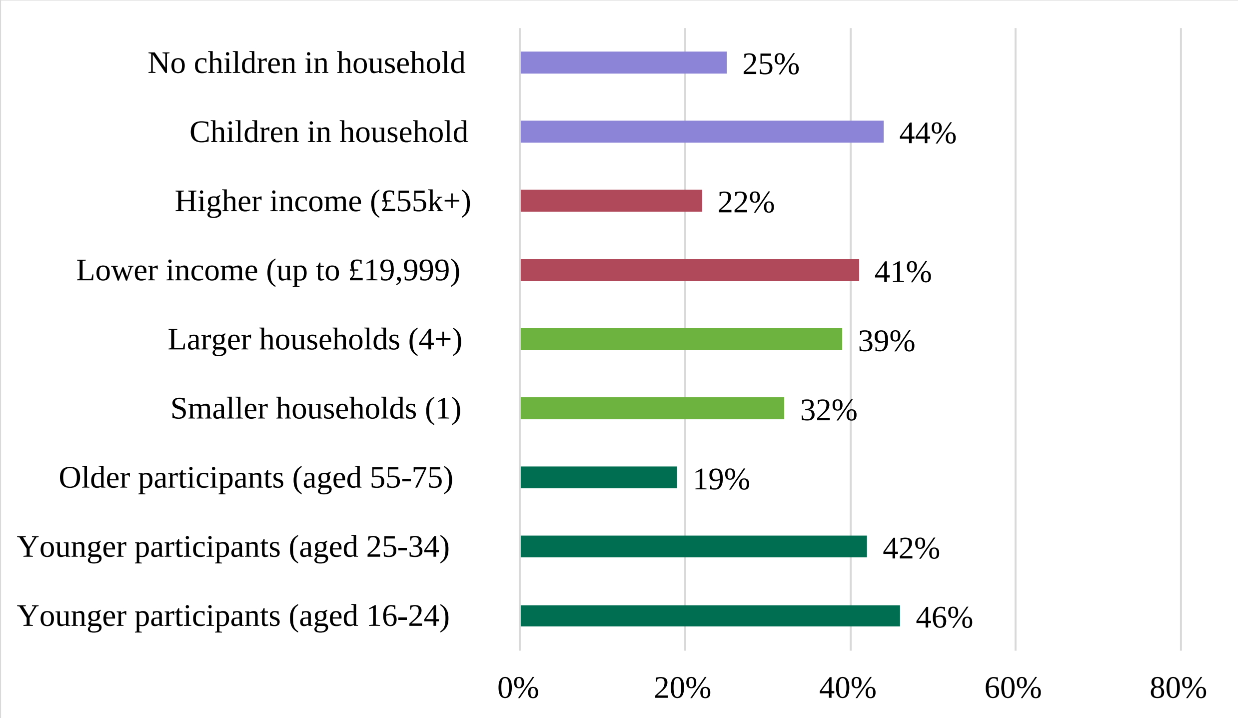
COVID-19 Consumer tracker April 2020-October 2021, Consumer insights tracking survey November 2021- March 2022, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 1 and 3. Values may not add to 100% as 'don't know' and 'prefer not to answer' responses are not shown.

Between November 2021 and March 2022, the following demographic groups were significantly more likely than their comparison groups to report feeling worried about food affordability:

- younger participants (16 -24-year-olds and 25-34-year-olds) compared to older participants (55-75-year-olds)
- participants from lower income groups (up to £19,999) compared to those in higher income groups (£55,000 or more)
- those from larger households (4+) compared to smaller (single person) households
- participants from households with at least one child present compared to households with no children present

Figure 2 summarises these demographic differences for March 2022, by way of example. The published data tables provide demographic comparisons for all other waves. Similar trends related to participant age, household size and presence of children in the household were also noted the FSA's previous COVID-19 tracker report (which included data from April 2020 – October 2021).

Figure 2: Reported worries about food affordability; key demographic differences (March 2022)



Consumer insights tracking survey March 2022, Online, England, Wales and NI, adults 16-75, Fieldwork dates and full sample sizes available in Annex 3. Indicative base sizes (March 22): 16-24 (308), 25-34 (350), 55-75 (605), households with children (660), households without children (1,356), larger households (4+) (493), single person households (385), higher income; £55k+ (414), lower income; up to £19,999 (436).

Food insecurity cutting or skipping meals

The consumer insights tracker asked participants if they have cut down the size of meals or skipped meals for any of the following reasons:

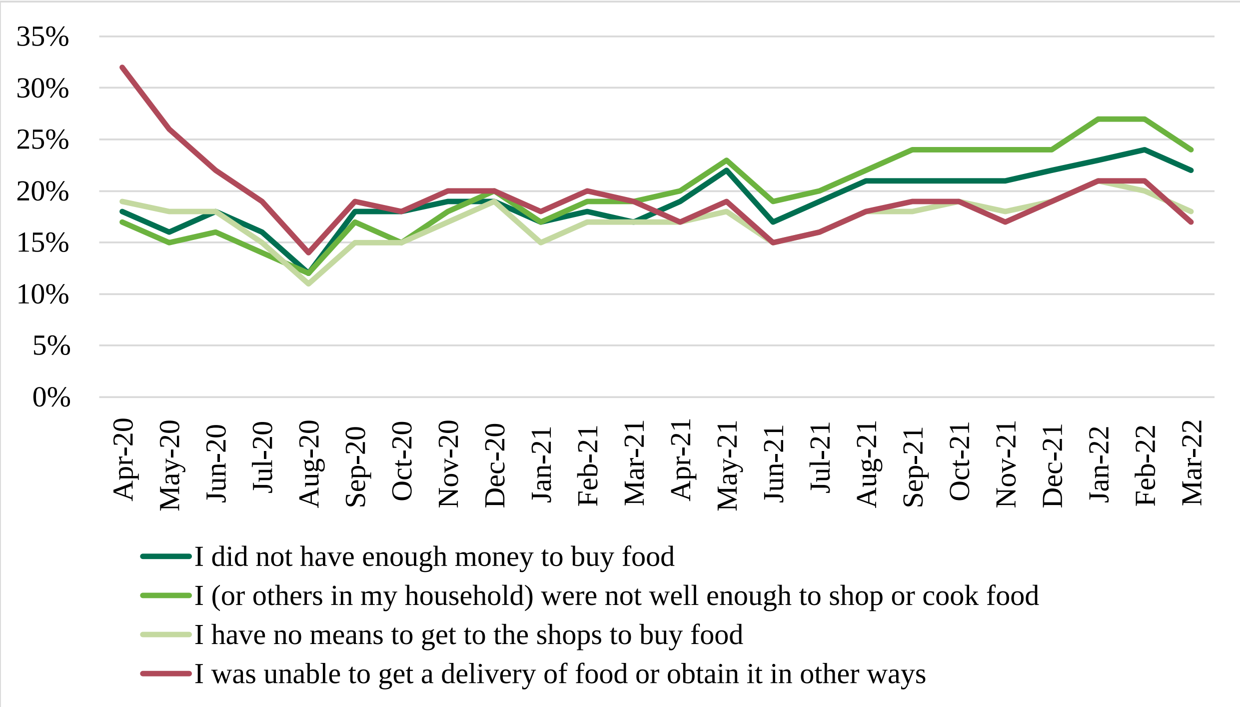
- they did not have enough money to buy food (financial reasons).
- they (or others in their households) were not well enough to shop or cook food (health reasons).
- they had no means to get to the shop to buy food (limited access to shops).
- they were unable to get a delivery of food, or obtain food in other ways (unable to get delivery of food).

The proportion of participants who reported cutting down the size of meals or skipping meals for financial reasons was 18% in April 2020. Since January 2021, at least 17% of participants have reported skipping meals or cutting down the size of their meals because they did not have enough money to buy food. Between June 2021 and February 2022, this proportion increased significantly (17% to 24%, respectively). The latest figure in March 2022 indicates that over one in five (22%) participants skipped or cut down the size of meals for financial reasons, significantly higher than when tracking first began in April 2020 (18%). This proportion has remained relatively stable over the recent winter period (22% in both December 2021 and March 2022), although there is a significant increase since the previous winter (was 19% in December 2020 and 17% in March 2021). See Figure 2 for a summary of this data.

Similar trends are also noted for the other reasons for skipping or cutting down the size of meals. From February 2021 onwards, the most reported reason for participants to skip meals was because they were not well enough to shop or cook food (i.e., health reasons). In January and February 2022, the proportion of participants who reported skipping or cutting down the size of meals for this reason was 27%, significantly higher than when tracking began in April 2020 (17%). In March 2022, almost one quarter of participants reported skipping or cutting down meals for this reason (24%).

Prior to February 2021, the most common reason for skipping or cutting down the size of meals was being unable to get a delivery of food or obtain food in other ways; this reason was particularly high when tracking first began in April 2020 (32%) but has declined significantly to 17% in March 2022. This figure also dipped in August 2020 and June 2021 (14% and 15%, respectively) (Figure 3).

Figure 3: Proportion of participants who reported cutting down the size of meals or skipping meals 'at least once' or more in the month prior for different reasons (April 2020 to March 2022)



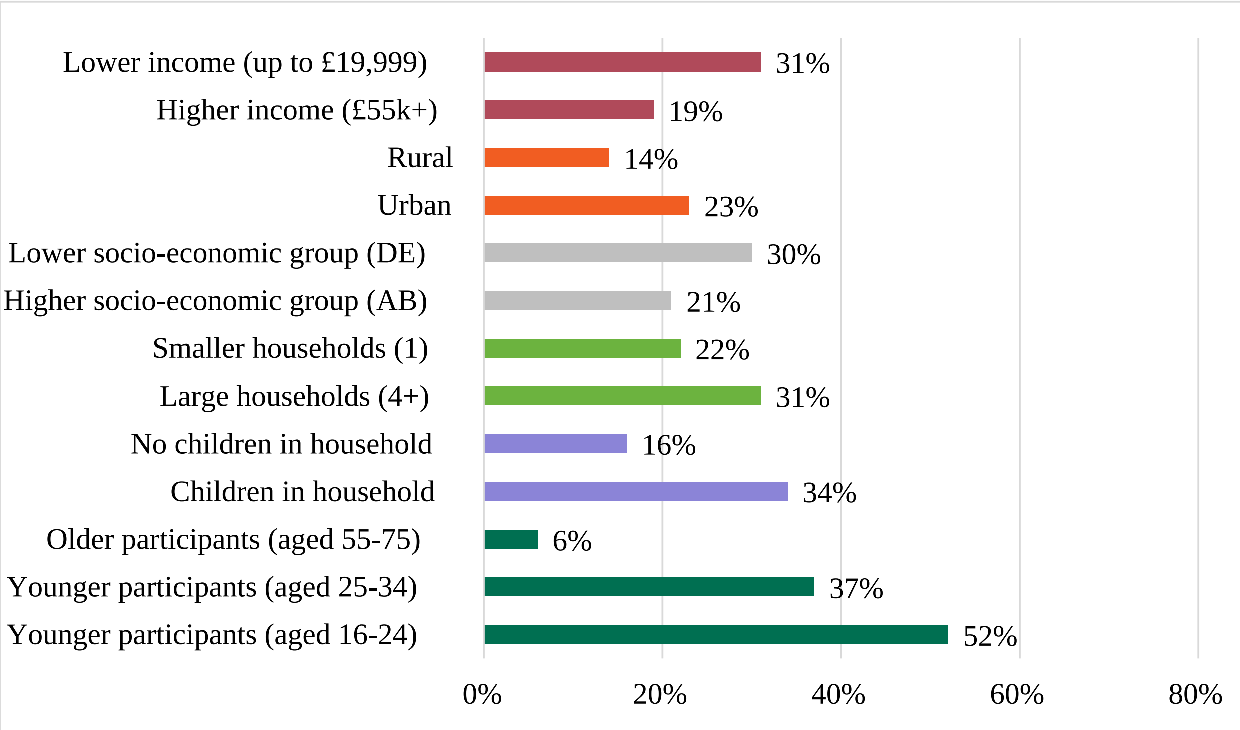
COVID-19 Consumer tracker April 2020-October 2021, Consumer insights tracking survey November 2021- March 2022, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 1 and 3. Values shown indicate all affirmative responses to this question (for example, skipping/cutting down meals happened at least once in the past month, or more often).

Between November 2021 and March 2022, the following demographic groups were significantly more likely than their comparison groups to report skipping meals or cutting down the size of meals because they could not afford food:

- younger participants (16 -24-year-olds and 25–34-year-olds) compared to older participants (55-75-year-olds)
- those from larger households (4+) compared to smaller (single person) households
- those from households with at least one child present compared to households with no children present
- participants from a lower socio-economic background (group DE), compared to those from a higher socio-economic background (group AB)
- participants in an urban setting, compared to participants in a rural setting
- participants from lower income groups (up to £19,999) compared to those in higher income groups (£55,000 or more)

Figure 4 summarises these demographic differences for March 2022, by way of example. The published data tables provide demographic comparisons for all other waves. Similar trends, related to participant age, household size and presence of children in the household were also noted the FSA's previous COVID-19 tracker report (which included data from April 2020 – October 2021).

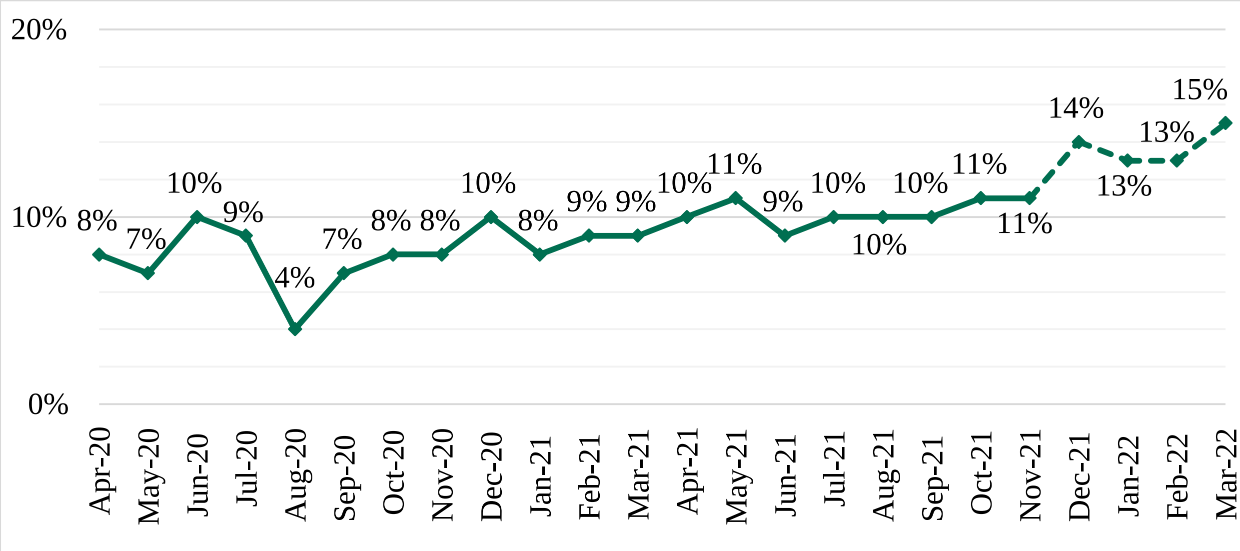
Figure 4: Demographic breakdown of proportion of participants reporting cutting down the size of meals/ skipping meals for financial reasons (March 2022)



Consumer insights tracking survey March 2022, Online, England, Wales and NI, adults 16-75, Fieldwork dates and full sample sizes available in Annex 3. Indicative base sizes (March 22): 16-24 (308), 25-34 (350), 55-75 (605), households with children (660), households without children (1,356), larger households (4+) (493), single person households (385), higher income; £55k+ (414), lower income; up to £19,999 (436), urban (1,635), rural (321), socio-economic group AB (879), socio-economic group DE (333).

Food insecurity: use of food charities and food banks

In April 2020, 8% of participants reported using food charities or food banks to access food. This proportion decreased significantly to 4% in August 2020 and remained between 7% and 11% until November 2021. However, in December 2021, this figure rose significantly to 14% (13% in both January and February 2022). March 2022 saw the highest proportion, and a statistically significant increase, since tracking began (15% in March 2022, compared with 8% in April 2020). Although the reported use of food charities or food banks has remained stable over the recent winter period (was 14% in December 2021, and 15% in March 2022), there has been a significant increase since the previous winter (was 10% in December 2020 and 9% in March 2021). See Figure 5 for a summary of this data.



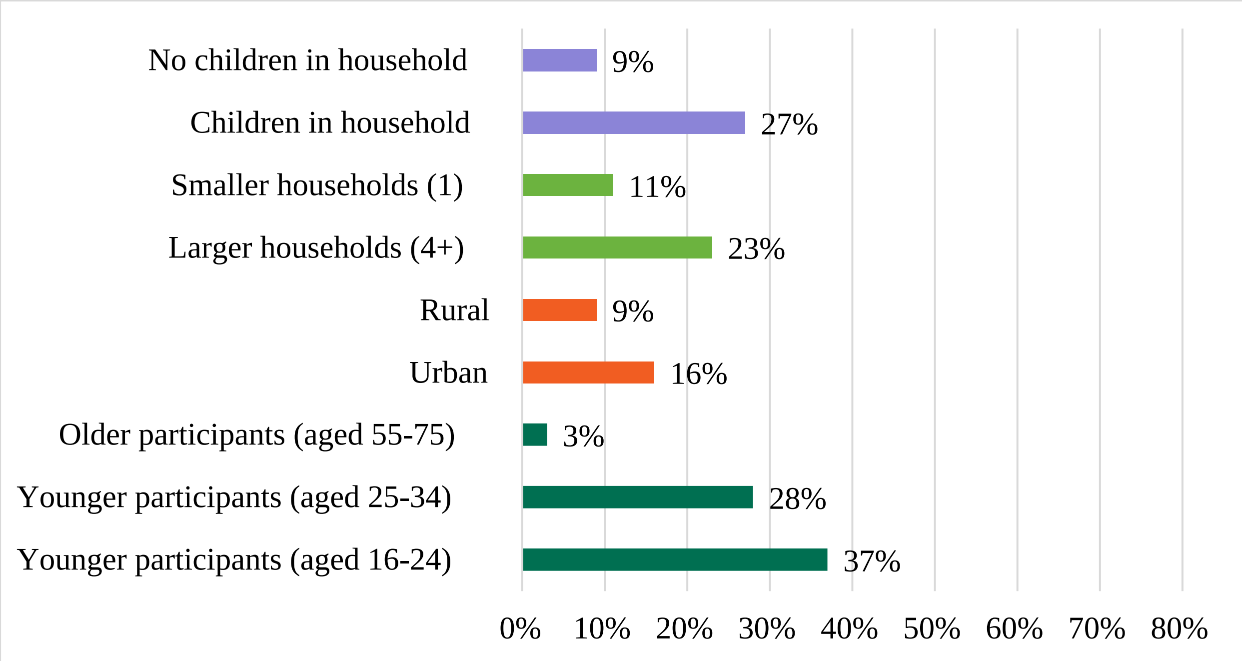
COVID-19 Consumer tracker April 2020-October 2021, Consumer insights tracking survey November 2021- March 2022, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 1 and 3. Combined affirmative responses shown. Note: From November 2021 onwards the phrasing of this question changed from 'In the last month, how often, if at all, have you arranged for food to be delivered to your house through a food charity or food bank?' to 'in the last month, how often, if at all, have you used a food charity or food bank?'

Between November 2021 and March 2022, the following demographic groups were significantly more likely than their comparison groups to report using a food banks or food charity:

- younger participants (16 -24-year-olds and 25-34-year-olds) compared to older participants (55-75-year-olds)
- those from larger households (4+) compared to smaller households (single person households)
- households with at least one child present compared to households with no children present
- participants in an urban setting, compared to participants in a rural setting.

Figure 6 summarises these demographic differences for March 2022, by way of example. The published data tables provide demographic comparisons for all other waves. Similar trends, related to participant age, household size and presence of children in the household were also noted the FSA's previous [COVID-19 tracker report](#) (which included data from April 2020 to October 2021).

Figure 6: Reported use of food banks and food charities by key demographic groups (March 2022)

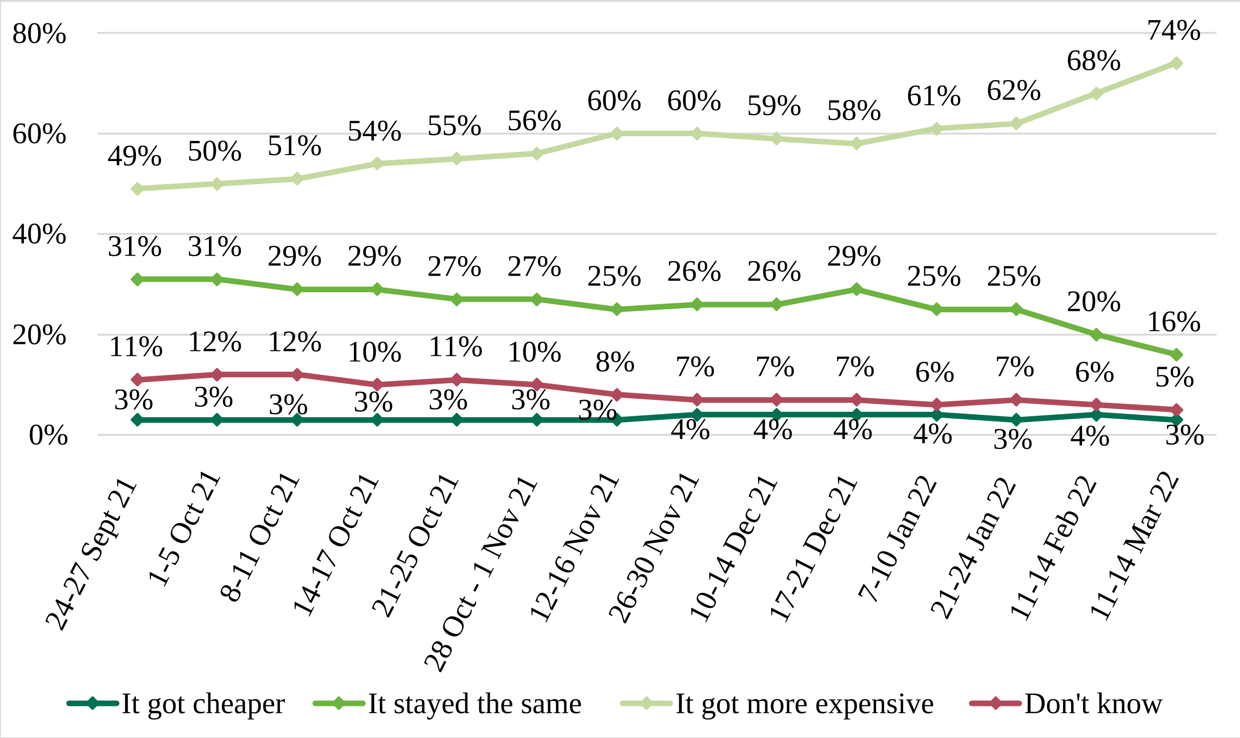


Consumer insights tracking survey March 2022, Online, England, Wales and NI, adults 16-75, Fieldwork dates and full sample sizes available in Annex 3. Indicative base sizes (March 22): 16-24 (308), 25-34 (350), 55-75 (605), households with children (660), households without children (1,356), larger households (4+) (493), single person households (385), urban (1,635), rural (321).

Consumer perceptions of food prices

Latest data (March 2022) showed that nearly three-quarters of participants (74%) believed that their food shopping had ‘got more expensive’ in the past week. This proportion had significantly increased since tracking began at the end of September 2021 (49%). In each wave, only 3-4% of participants thought that their food shopping had ‘got cheaper’, whilst the proportion who reported that the price of their food shopping had ‘stayed the same’ significantly decreased from the end of September 2021 (31%) to March 2022 (16%) (Figure 7).

Figure 7: Consumer perceptions of the price of their food shopping overtime (September 2021 to March 2022)



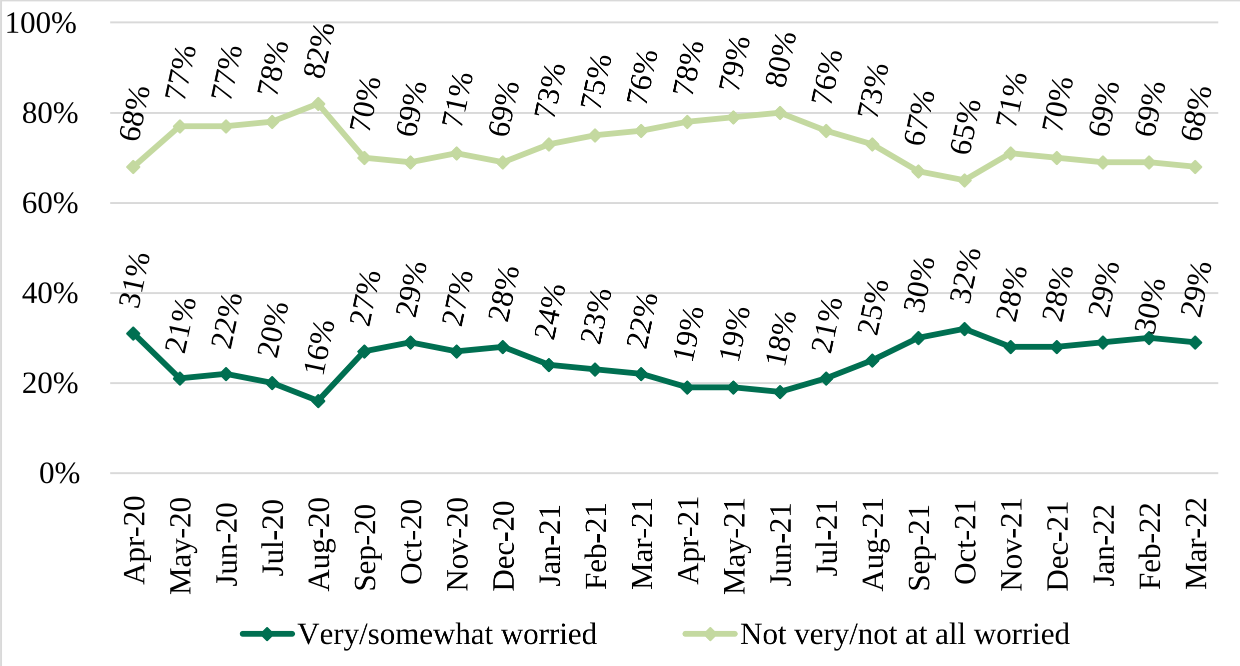
CO2 shortages weekly consumer survey, 24th September – 1st November 2021, Consumer insights tracking survey November 2021- March 2022, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 2 and 3. Between November 2021 and January 2022 data was collected fortnightly, from February 2022 data was collected monthly. Values may not add to 100% as ‘I haven’t done any food shopping in the past week’ responses are not shown.

Food availability

Consumer concerns about food availability

Over 3 in 10 participants (31%) reported feeling worried about food availability in April 2020, when data collection began. As shown in Figure 8, this proportion declined in August 2020 (16%) and in June 2021 (18%). However, worry about food availability continued to increase from June 2021, reaching a high of 32% in October 2021. The proportion remained stable but relatively high over the latest winter period (28% in December 2021 to 29% in March 2022).

Figure 8: Level of worry about food availability over time (April 2020 to March 2022)



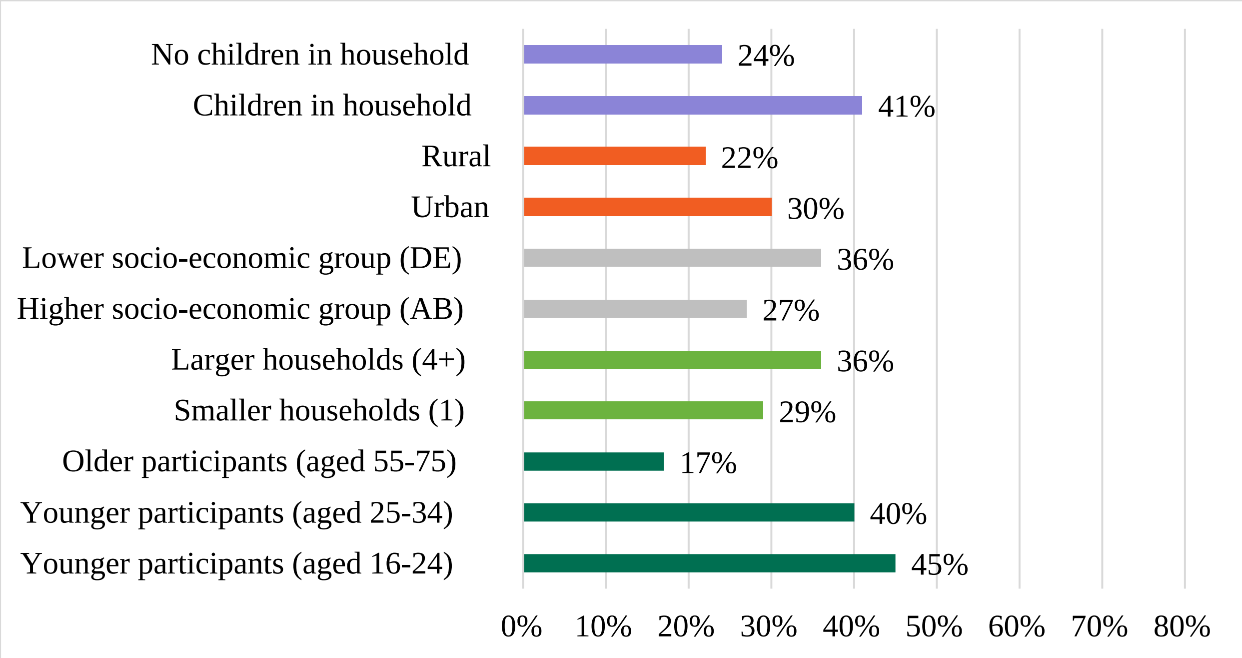
COVID-19 Consumer tracker April 2020-October 2021, Consumer insights tracking survey November 2021-March 2022, Online, England, Wales and NI, adults 16-75. Fieldwork dates and sample sizes available in Annex 1 and Annex 3. Values may not add to 100% as ‘don’t know’ and ‘prefer not to answer’ responses are not shown.

Between November 2021 and March 2022, the following demographic groups were significantly more likely than their comparison groups to report feeling worried about food availability:

- younger participants (16 -24-year-olds and 25-34-year-olds) compared to older participants (55-75-year-olds)
- participants from households with at least one child present compared to households with no children present
- participants in an urban setting, compared to participants in a rural setting
- participants from a lower socio-economic background (group DE), compared to those from a higher socio-economic background (group AB)
- those from larger households (4+) compared to smaller (single person) households

Figure 9 summarises these demographic differences for March 2022, by way of example. The published data tables provide demographic comparisons for all other waves. Similar trends, related to participant age, household size and presence of children in the household were also noted the FSA’s previous COVID-19 tracker report (which included data from April 2020 to October 2021).

Figure 9: Participants who reported feeling ‘worried’ about food availability; key demographic differences (March 2022)



Consumer insights tracking survey March 2022, Online, England, Wales and NI, adults 16-75, Fieldwork dates and full sample sizes available in Annex 3. Indicative base sizes (March 22): 16-24 (308), 25-34 (350), 55-75 (605), households with children (660), households without children (1,356), larger households (4+) (493), single person households (385), urban (1,635), rural (321), socio-economic group AB (879), socio-economic group DE (333).

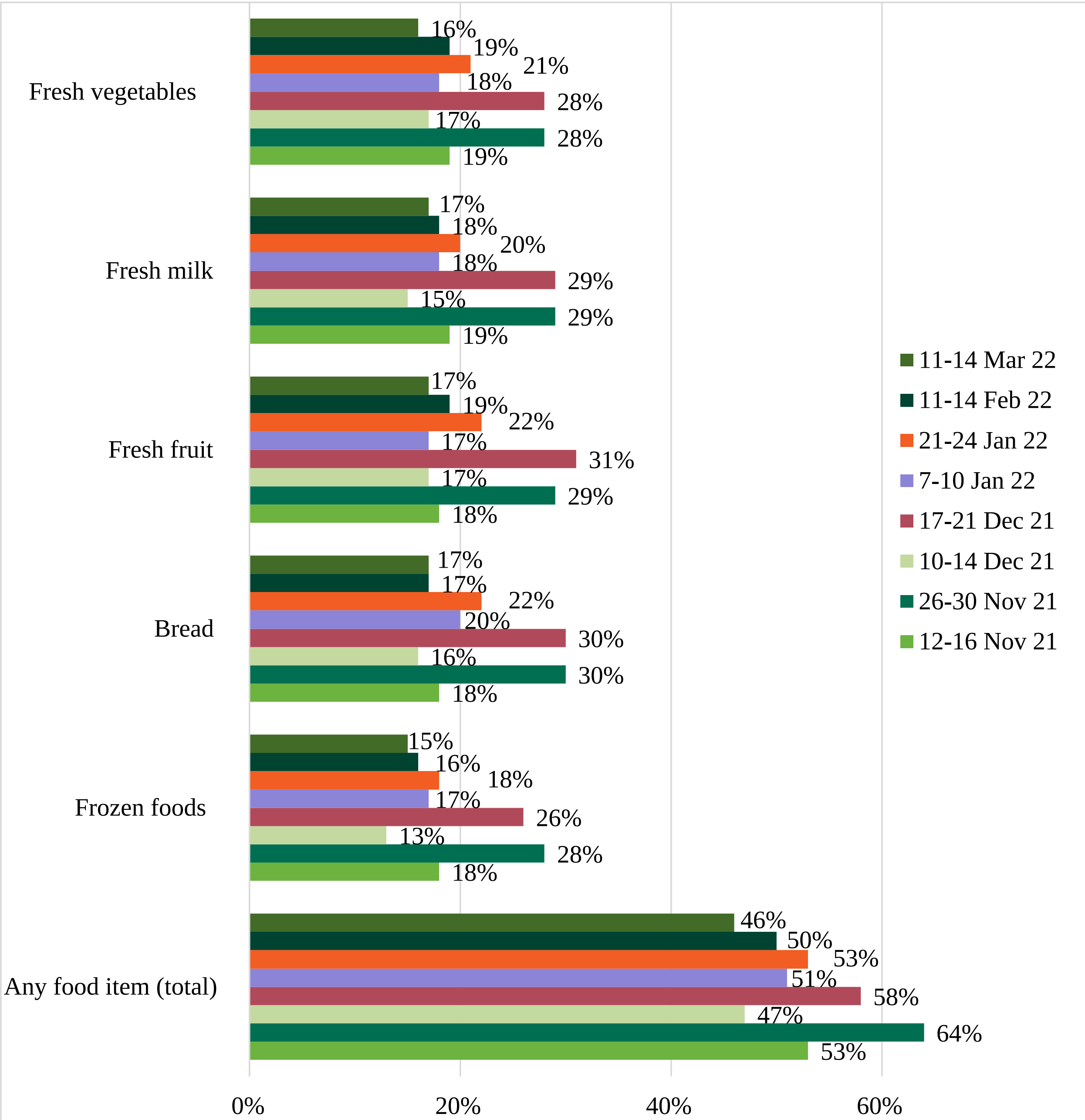
Consumer reports of unavailable items

Participants were asked if any of their preferred food products were unavailable whilst doing their usual food shopping (from a pre-defined list). Latest data from March 2022 shows that almost half of participants (46%) had experienced at least one food item being unavailable. This figure was significantly higher at the end of November 2021 (64%, 26-30th November 2021) and the weekend before Christmas (58%, 17th-21st December 2021) in comparison to other waves. Since January, the proportion of participants who reported experiencing unavailable food items slowly decreased. See Figure 10 for a summary of this data.

In March 2022, the 5 most common items that were reported as ‘unavailable’ were:

- fresh vegetables (16%)
- fresh milk (17%)
- fresh fruit (17%)
- bread (17%)
- frozen foods (15%)

Figure 10: Reports of food items being unavailable (top 5 items) (November 2021 to March 2022)

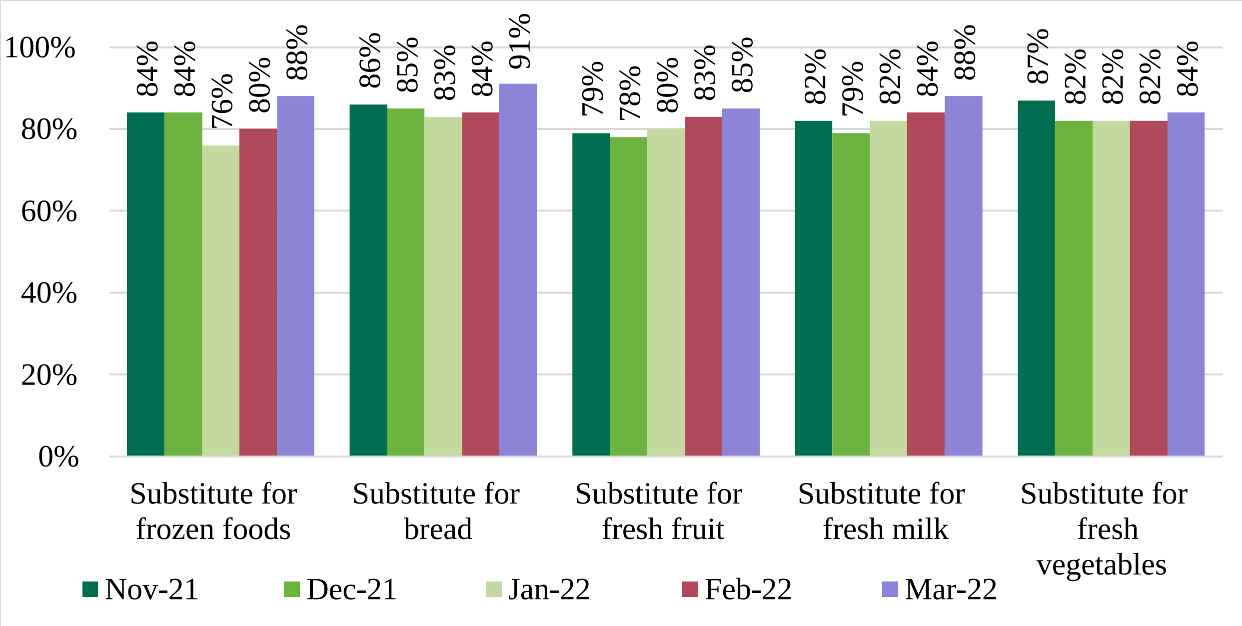


Consumer insights tracking survey November 2021- March 2022, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 3. Between November 2021 and January 2022 data was collected fortnightly, from February 2022 data was collected monthly.

In each wave, participants who reported a food item as ‘unavailable’ were asked if they were able to find a suitable substitute for the unavailable item. In March 2022, of those who reported the item unavailable, 91% were (always or sometimes) able to find a substitute for bread, 88% were (always or sometimes) able to find a suitable substitute for both frozen foods and fresh milk, 85% were (always or sometimes) able to find a suitable substitute for fresh fruit and 84% were (always or sometimes) able to find a suitable substitute for fresh vegetables (Figure 11).

This question was asked every fortnight between November and January (inclusive). However, Figure 11 only displays a single data point for each month for easier comparison of the trends overtime. All data tables (including fortnightly figures) are available for download via the [FSA data catalogue](#).

Figure 11: Proportion of participants able to find a suitable substitute for unavailable food items (top 5 items) (November 2021 to March 2022)



Consumer insights tracking survey November 2021- March 2022, Online, England, Wales and NI, adults 16-75 who reported the food item as 'unavailable'. Indicative base sizes for March 2022; frozen foods (378), bread (394), fresh fruit (428), fresh milk (350), fresh vegetables (441). Between November 2021 and January 2022 data was collected fortnightly, from February 2022 data was collected monthly. Only monthly figures are presented within this graph.

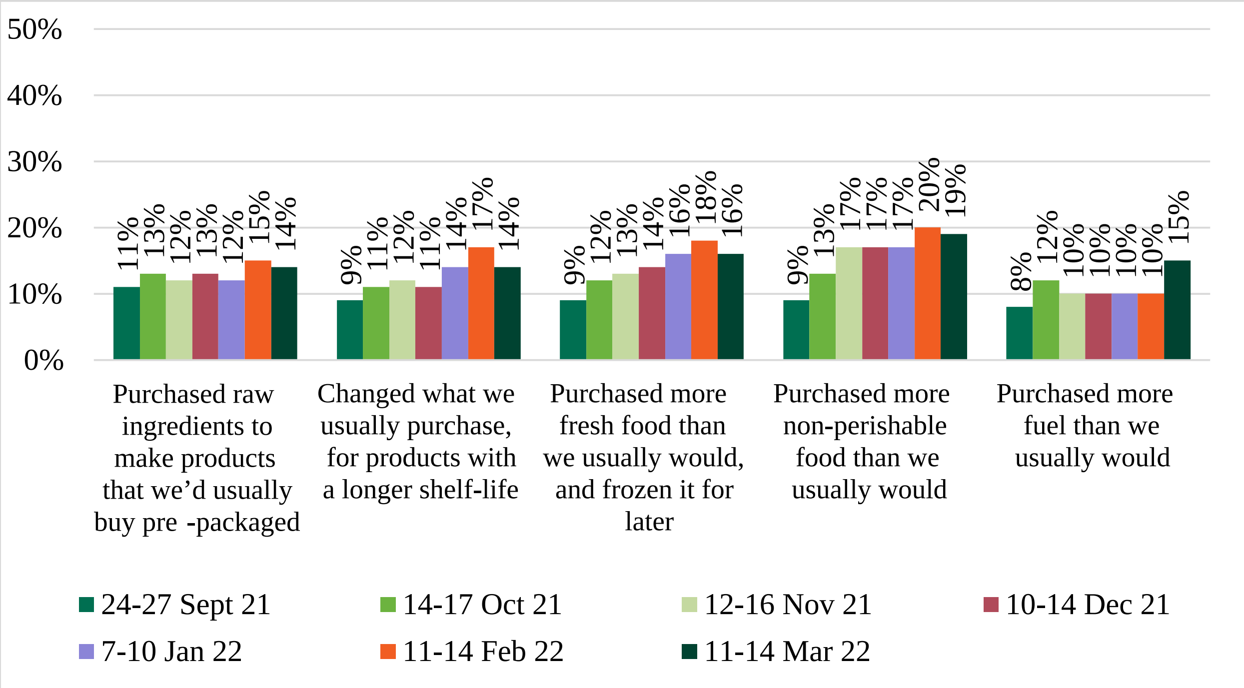
Participants were also asked how often, if at all, they had done any of the following behaviours, to gain insight into over purchasing or stockpiling behaviours:

- purchased raw ingredients to make products that they would usually buy pre-packaged
- changed what they usually purchase, for products with a longer shelf life
- purchased more fresh food than they usually would, and frozen it for later
- purchased more non-perishable food than they usually would
- purchased more fuel than they usually would

Most of these behaviours showed a gradual increase from September 2021 (when tracking began) until February 2022 where they peaked. 'Purchasing more fuel than we usually would' showed a different trend; this proportion increased between September 2021 (8%) and October (12%), then remained relatively stable until March 2022, when it increased significantly to 15% (was 10% in February 2022) (Figure 12).

This question was asked every fortnight between September 2021 and January 2022, however Figure 12 only displays a single data point for each month for a more simplified comparison of the trends overtime. All data tables (including fortnightly figures) are available for download via the [FSA data catalogue.]

Figure 12: Proportion of participants who reported over-purchasing or stockpiling behaviours (September 2021 to March 2022)



CO2 shortages weekly consumer survey, 24th September – 1st November 2021, Consumer insights tracking survey November 2021- March 2022, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 2 and 3. In September and October, data was collected weekly. Between November 2021 and January 2022 data was collected fortnightly, from February 2022 data was collected monthly. Only monthly figures are presented within this graph.

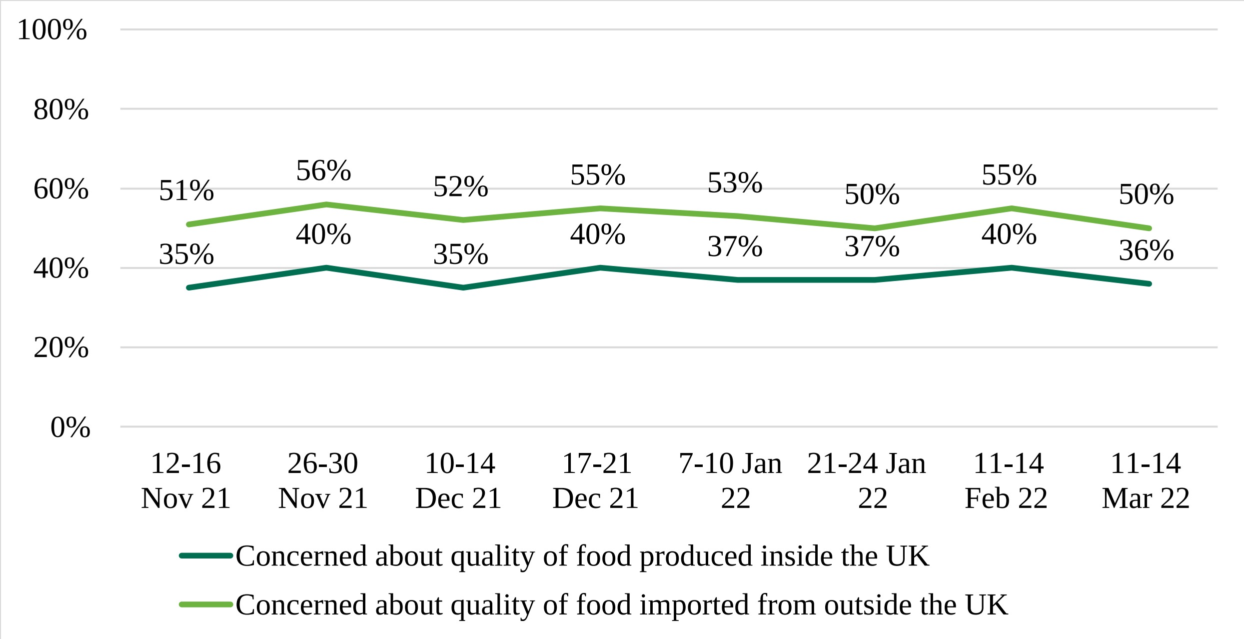
Consumer concerns and confidence in the food supply chain

Concerns about food quality

In mid-November 2021, 35% of participants reported feeling concerned about the quality of food produced inside the UK. This proportion has fluctuated overtime; with highs of 40% at the end of November, end of December and in February 2022 (40%). The latest figure was 36% in March 2022, in line with previous waves (Figure 13).

The proportion of participants 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 November 2021, over half of participants (51%) reported concern about the quality of food imported from outside the UK (compared to 35% for quality of food produced in the UK). Although the proportion who reported concern about the quality of food imported from outside the UK has fluctuated (reaching a high of 56% in late-November 2021), the trend has remained broadly stable overtime. In March 2022, 50% of participants reported feeling concerned about the quality of food imported from outside the UK (Figure 13).

Figure 13: Participants who report being 'highly' or 'somewhat' concerned about the quality of food produced inside the UK or food imported from outside the UK (November 2021 to March 2022)

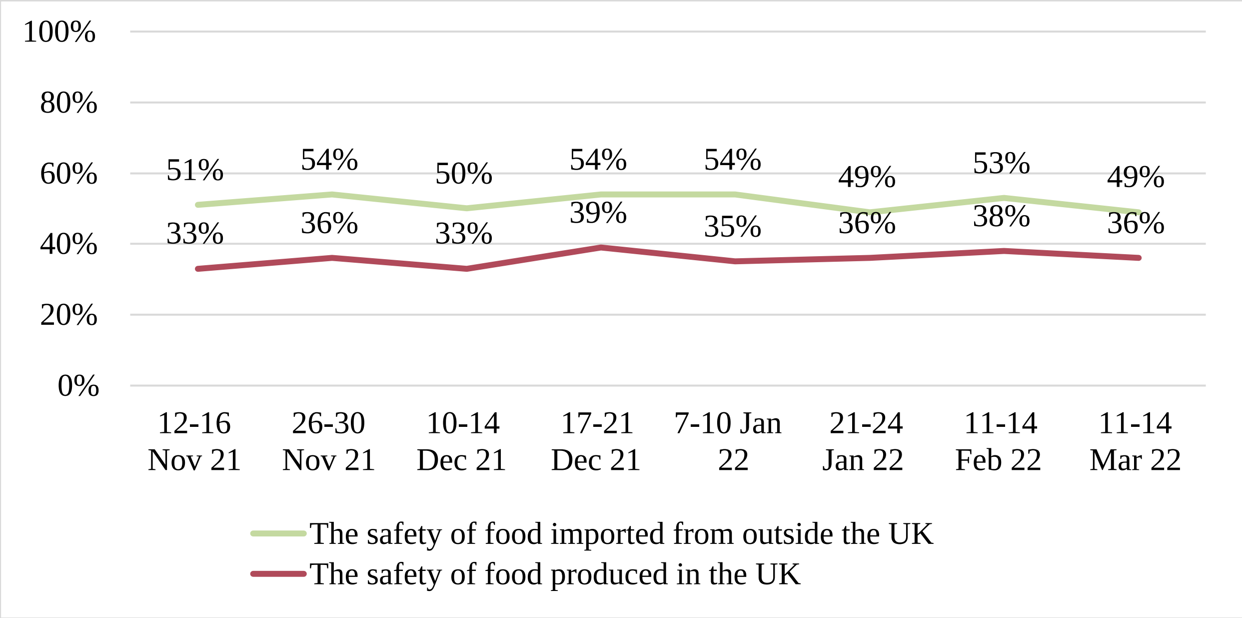


Consumer insights tracking survey November 2021- March 2022, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 1 and 3. Between November 2021 and January 2022 data was collected fortnightly, from February 2022 data was collected monthly. Consumer concerns about the quality of food were also captured in the COVID-19 tracker survey (from December 2020 onwards), however this data is not considered comparable to the data in the consumer insights tracker due to changes in question phrasing.

Concerns about food safety

From November 2021, participants were asked if they were concerned about the safety of food produced in the UK and of food imported from outside the UK (Figure 14). The findings are very similar to the level of concern about food quality (Figure 13). In November 2021, over half of participants (51%) reported feeling concerned about the safety of food imported from outside the UK, compared to 33% who reported concern about the safety of food produced in the UK. This trend is stable across all waves. The latest figures from March 2022 indicate that 49% of participants felt concerned about the safety of food imported from outside the UK, whilst significantly less participants (36%) felt concerned about the safety of food produced in the UK.

Figure 14: Participants who reported feeling ‘highly’ or ‘somewhat’ concerned about the safety of food (November 2021 to March 2022)



Consumer insights tracking survey November 2021- March 2022, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 3. Between November 2021 and January 2022 data was collected fortnightly, from February 2022 data was collected monthly.

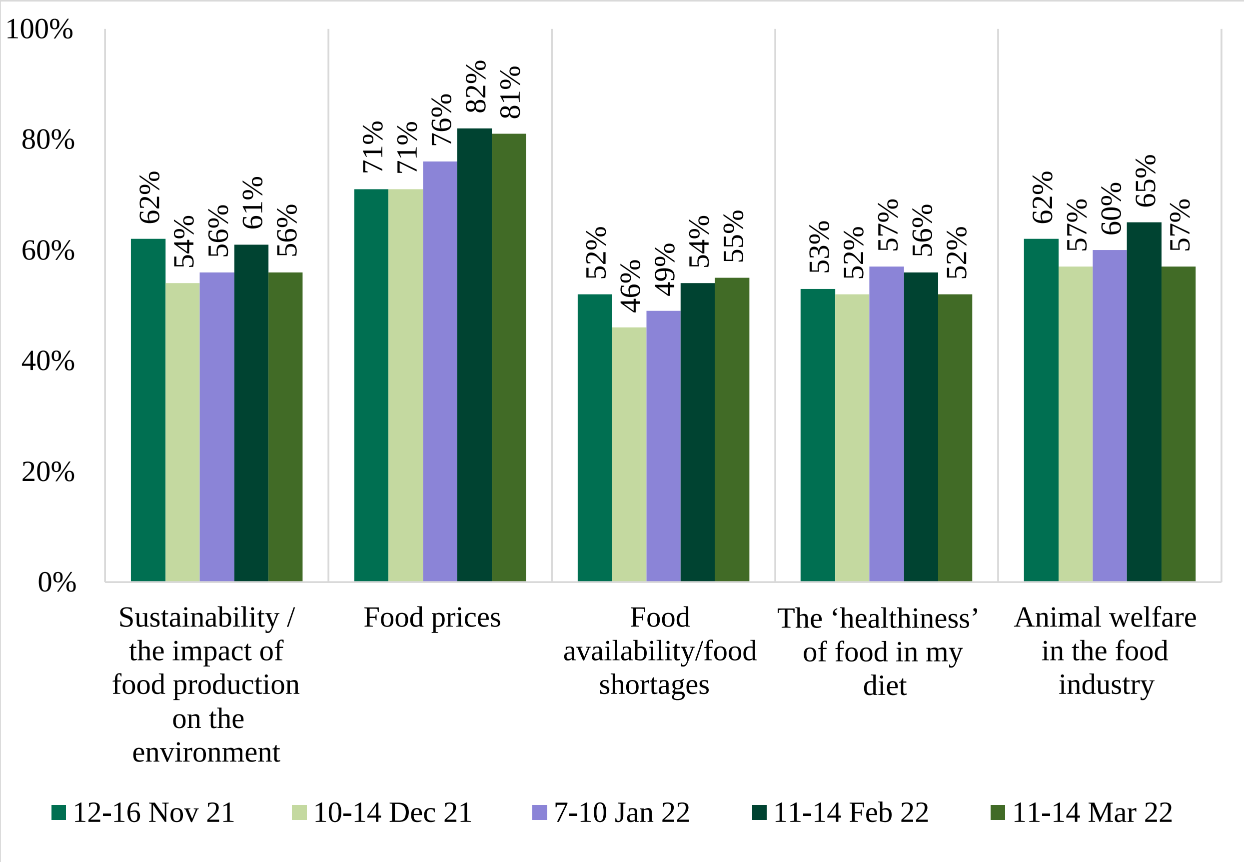
Other concerns about the food industry

In all waves, the highest rated concern (based on the prompted list) was ‘food prices’. In November 2021 (when tracking for this question began), 71% of participants reported that they were ‘highly’ or ‘somewhat’ concerned about food prices. This proportion increased significantly to 81% in March 2022 (Figure 15).

In November 2021, 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 food in my diet’ (53%), but this was still over half of those surveyed (November 2021). Latest data shows a significant decrease in the proportion of participants reporting concern about animal welfare since February (57% in March 2022 compared to 65% in February 2022). All other concerns remain broadly stable overtime. In the latest wave (March 2022) over half of consumers reported feeling ‘concerned’ about animal welfare in the food industry (57%), sustainability / the impact of food production on the environment (56%), food availability/food shortages (55%) and the ‘healthiness’ of food in my diet (52%) (Figure 15).

This question was asked every fortnight between November 2021 and January 2022, however Figure 15 only displays a single data point for each month for a more simplified comparison of the trends overtime. All data tables (including fortnightly figures) are available for download via the FSA data catalogue.

Figure 15: Participants who reported feeling ‘highly’ or ‘somewhat’ concerned about issues related to the food industry (November 2021 to March 2022)

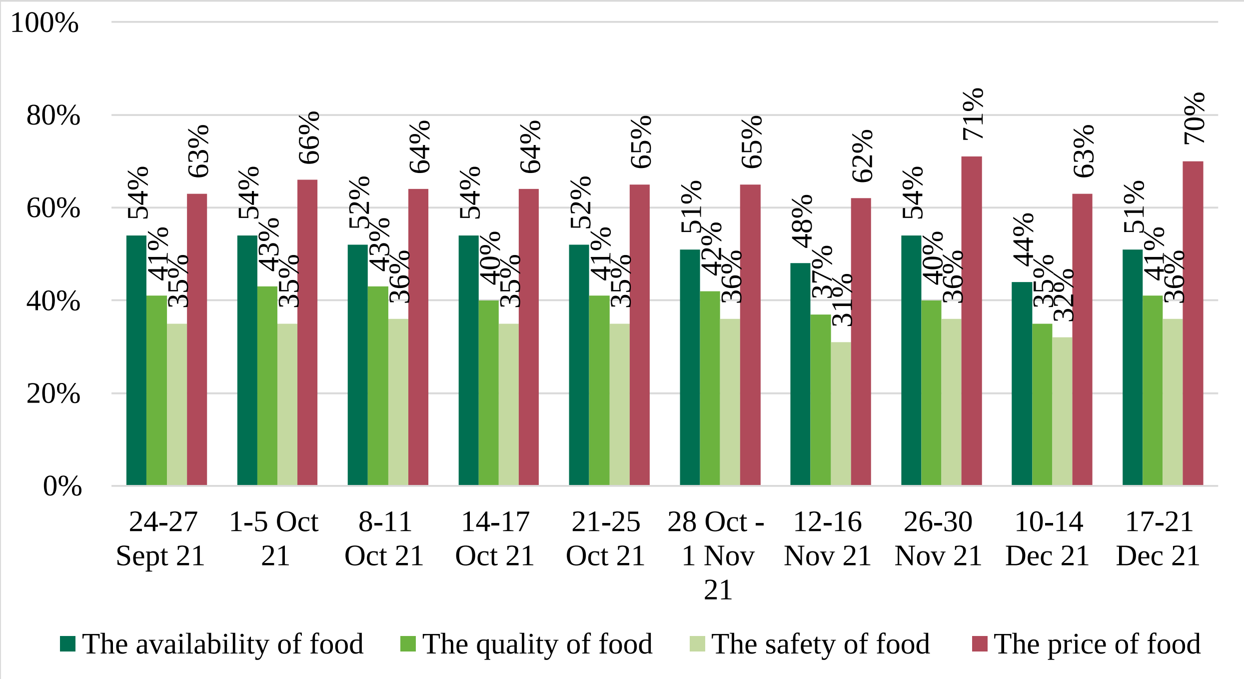


Consumer insights tracking survey November 2021- March 2022, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 3. Between November 2021 and January 2022 data was collected fortnightly, from February 2022 data was collected monthly. Only monthly figures are presented within this graph.

Concerns about Christmas and New Year

Participants were asked about their concerns in relation to food in the lead-up to Christmas (data collected between September 2021-December 2021). The latest data (17th -21st December 2021) showed that 7 in 10 participants were concerned about the price of food (70%) and over half of participants were concerned about the availability of food (51%) in relation to the upcoming Christmas and New Year. Concern about the quality (41%) and safety of food (36%) was significantly lower, although this still represents a sizable proportion of participants. The trend overtime is broadly stable for each of these concerns, although in the months closest to Christmas, there was a significant increase in the proportion of participants concerned about the price of food (Figure 16).

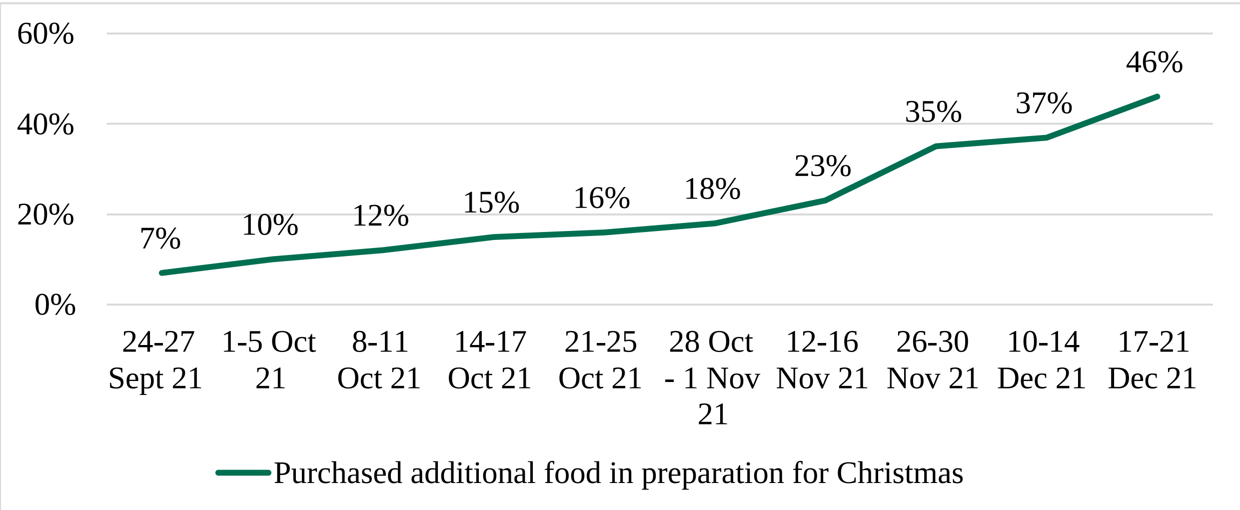
Figure 16: Participants who reported being 'highly' or 'somewhat' concerned about food for Christmas and New Year (September 2021 to December 2021)



CO2 shortages weekly consumer survey, 24th September – 1st November 2021, Consumer insights tracking survey November 2021- March 2022, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 2 and 3. Between November 2021 and January 2022 data was collected fortnightly, from February 2022 data was collected monthly.

At the end of September 2021, the proportion of participants who reported purchasing additional food in preparation for Christmas was 7%. This figure rose slowly, until reaching a high at 46% in the final wave (17th-21st December 2021) (Figure 17).

Figure 17: Participants who reported purchasing additional food in preparation for Christmas (September 2021 to December 2021)

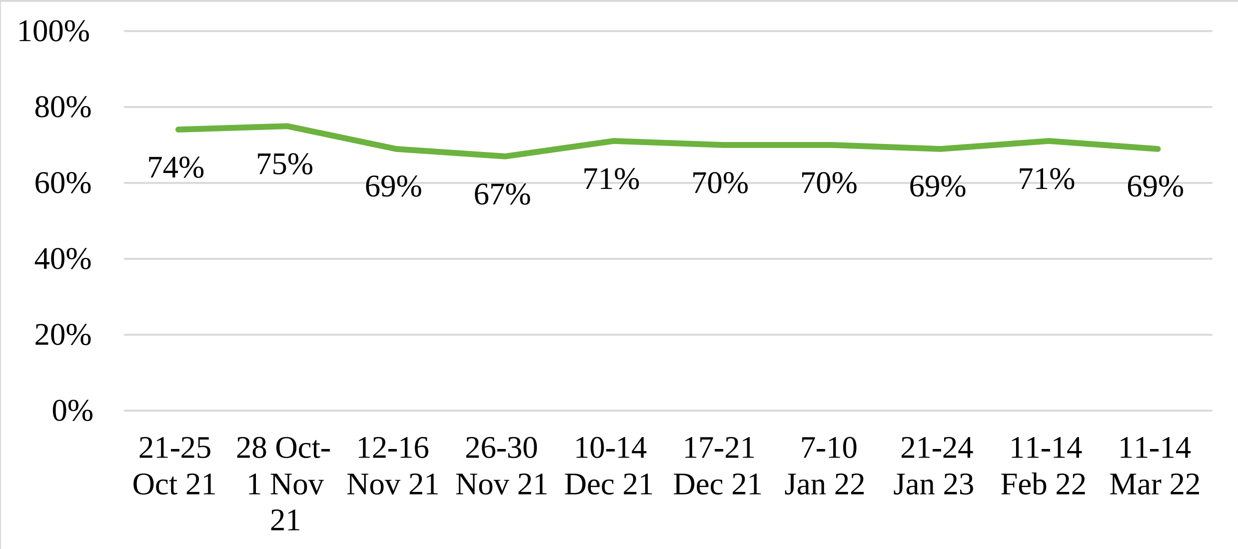


CO2 shortages weekly consumer survey, 24th September – 1st November 2021, Consumer insights tracking survey November 2021- March 2022, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 2 and 3. In September and October data was collected weekly. Between November 2021 and January 2022 data was collected fortnightly, from February 2022 data was collected monthly.

Confident in the food supply chain

When tracking began in late October 2021, 74% of participants felt 'confident' in the food supply chain. This figure declined to 67% in the end of November but has remained broadly stable since. The latest figure (March 2022) indicates that almost 7 in 10 participants (69%) were confident in the food supply chain (Figure 18).

Figure 18: Participants who reported being 'very' or 'fairly' confident in the food supply chain (October 2021 to March 2022)



CO_2 shortages weekly consumer survey, 21st October – 1st November 2021, Consumer insights tracking survey November 2021- March 2022, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 2 and 3. In October and November data was collected weekly. Between November 2021 and January 2022 data was collected fortnightly, from February 2022 data was collected monthly.

From November 2021, participants were also asked about their confidence in the food supply chain to ensure:

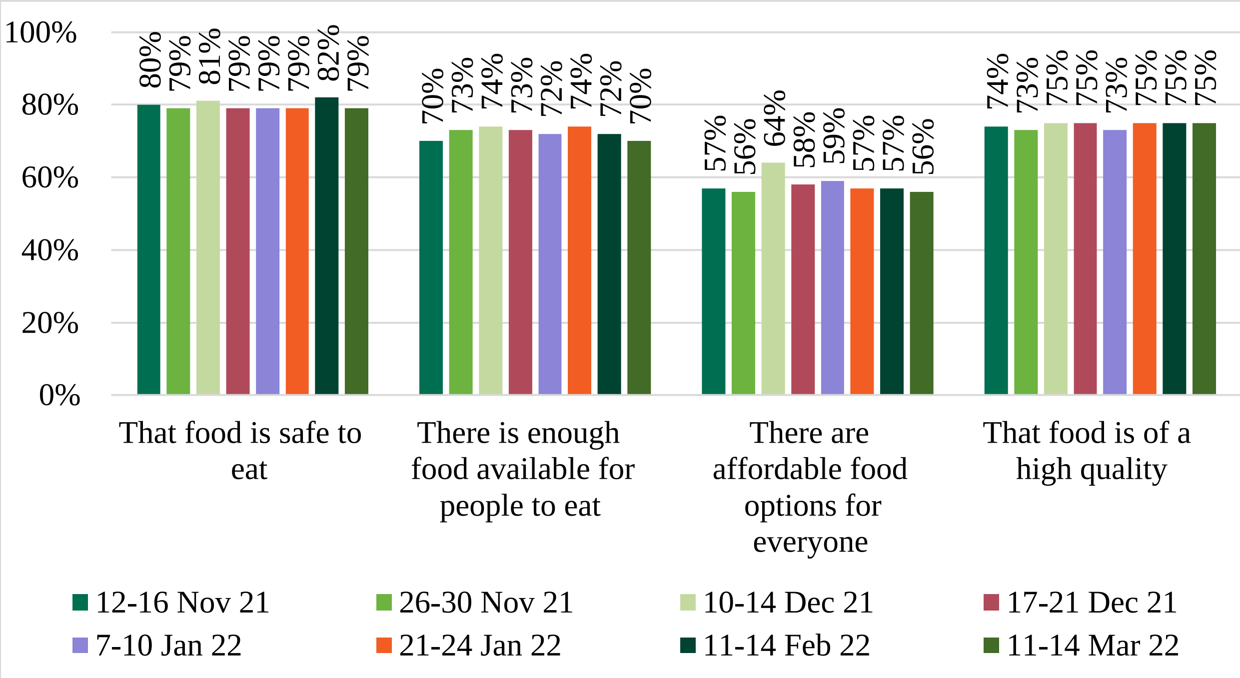
- that food is safe to eat
- there is enough food available for people to eat
- there are affordable food options for everyone
- that food is of a high quality

In November 2021, when tracking began, 4 in 5 participants (80%) were confident that those involved in the food supply chain in the UK ensure that food is safe to eat, whilst 74% were confident that the food supply chain in the UK ensures that food is of a high quality. In the latest wave (March 2022), these figures remained relatively stable: 4 in 5 participants (79%) were confident that those involved in the food supply chain in the UK ensure that food is safe to eat whilst three-quarters (75%) were confident that food is of a high quality. These figures were stable across all reported waves.

In November 2021, 70% of participants were confident that the food supply chain in the UK provides enough food for people to eat, and although this proportion increased to 74% in December 2021 and January 2022, the figure in March 2022 remains stable at 70%.

Across all waves, a much smaller proportion of participants were confident that the food supply chain in the UK provides affordable food options for everyone (for example, 57% in November 2021). Although this figure increased to 64% in mid-December 2021, it has remained broadly stable in other waves. In March 2022, 56% of participants reported feeling confident that the food supply chain in the UK provides affordable food options for everyone. Each of these findings are summarised in Figure 19.

Figure 19: 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 to March 2022)



Consumer insights tracking survey November 2021- March 2022, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 3. Between November 2021 and January 2022 data was collected fortnightly, from February 2022 data was collected monthly.

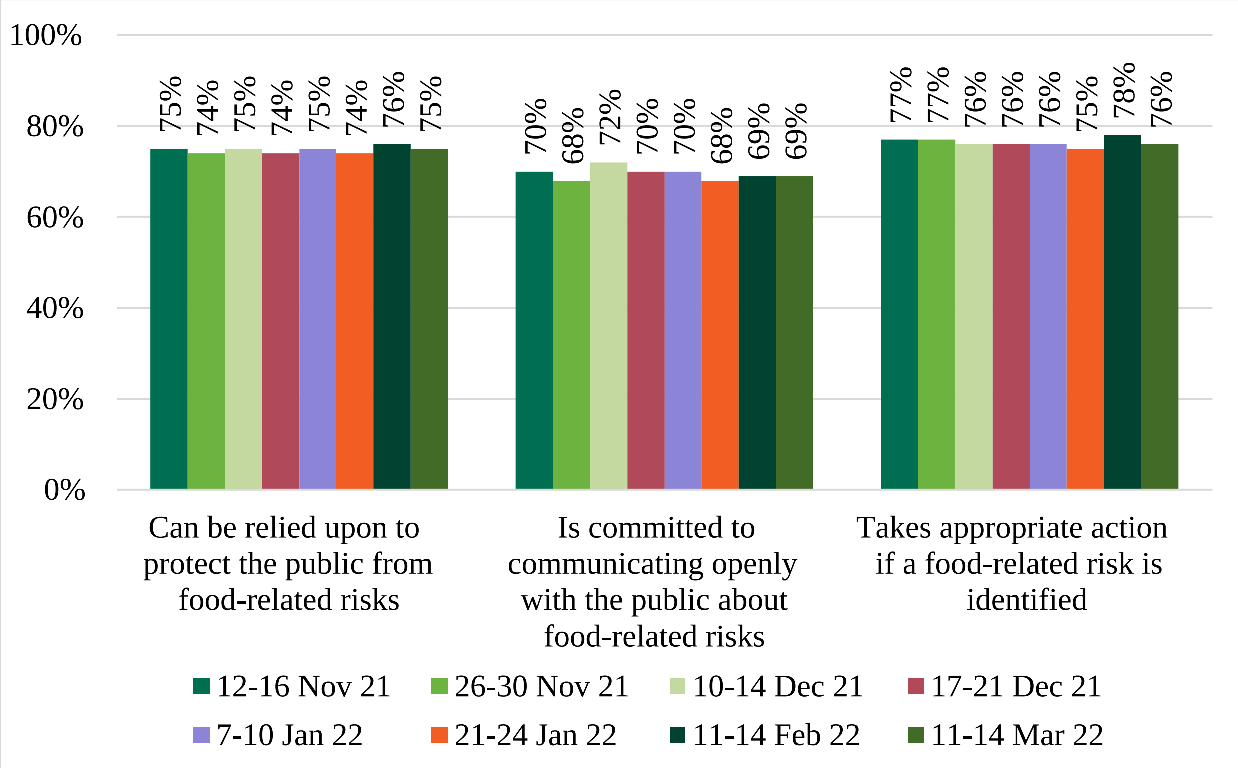
Perceptions of the FSA

From November 2021, participants were asked about their confidence in the FSA as a food regulator. Data from March 2022 shows that 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 (69%)
- takes appropriate action if a food-related risk is identified (76%)

These figures have been stable since tracking began in November 2021 (no significant changes) (Figure 20).

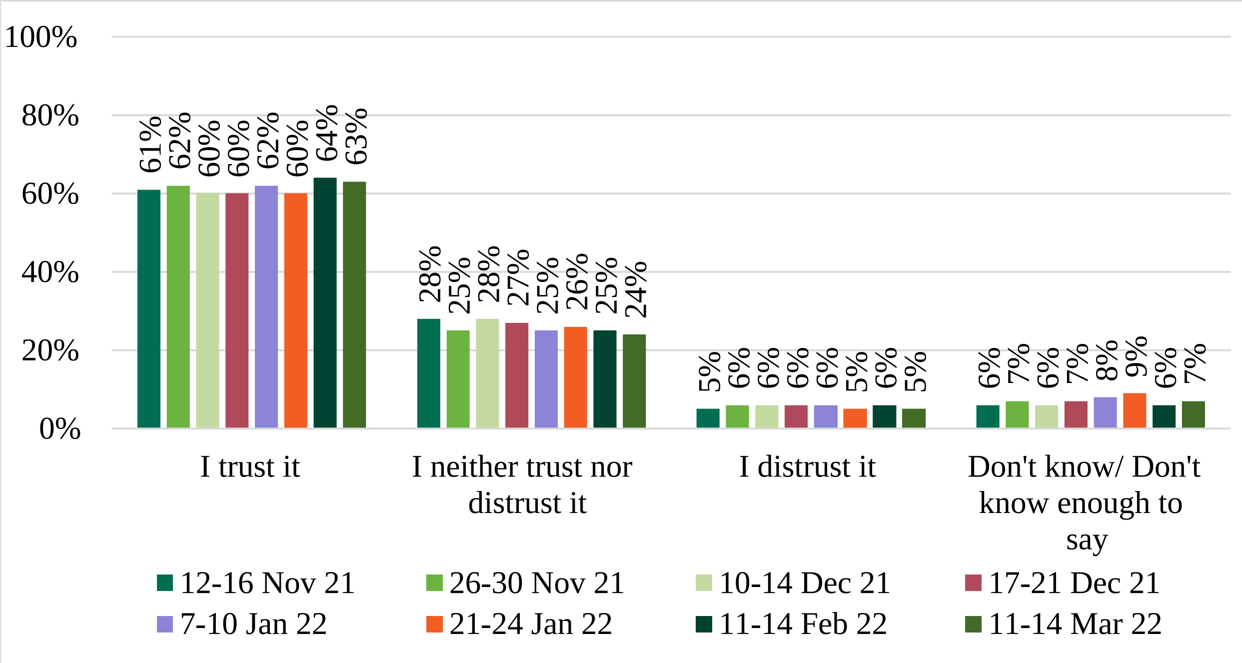
Figure 20: Participants who reported being 'very' or 'fairly' confident in the FSA with regards to food related risks (November 2021 to March 2022)



Consumer insights tracking survey November 2021- March 2022, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 3. Between November 2021 and January 2022 data was collected fortnightly, from February 2022 data was collected monthly.

Participants were also asked how much they trust the FSA to do its job (that is, to ‘make sure that food is safe and what it says it is’). ‘I trust it’ figures are calculated by combining ‘I trust it’ and ‘I trust it a lot’ responses. ‘I distrust it’ figures are calculated by combining ‘I distrust it’ and ‘I distrust it a lot’ figures. Since November, the proportion of participants stating they trust the FSA remains stable (within 60-64%). Participants who state they distrust the FSA has also remained stable (figures stay between 5-6% from November 2021 to March 2022) (Figure 21).

Figure 21: Participants who trust/distrust the FSA to 'make sure food is safe and is what it says it is' (November 2021 to March 2022)



Consumer insights tracking survey November 2021- March 2022, Online, England, Wales and NI, adults 16-75, Fieldwork dates and sample sizes available in Annex 3. Between November 2021 and January 2022 data was collected fortnightly, from February 2022 data was collected monthly. ‘I trust it’ figures are calculated by combining ‘I trust it’ and ‘I trust it a lot’ responses. ‘I distrust it’ figures are calculated by combining ‘I distrust it’ and ‘I distrust it a lot’ figures.

Food safety behaviours

The FSA’s COVID-19 tracker report provides commentary on participants who report eating food past the use-by date, from July 2020 to October 2021.

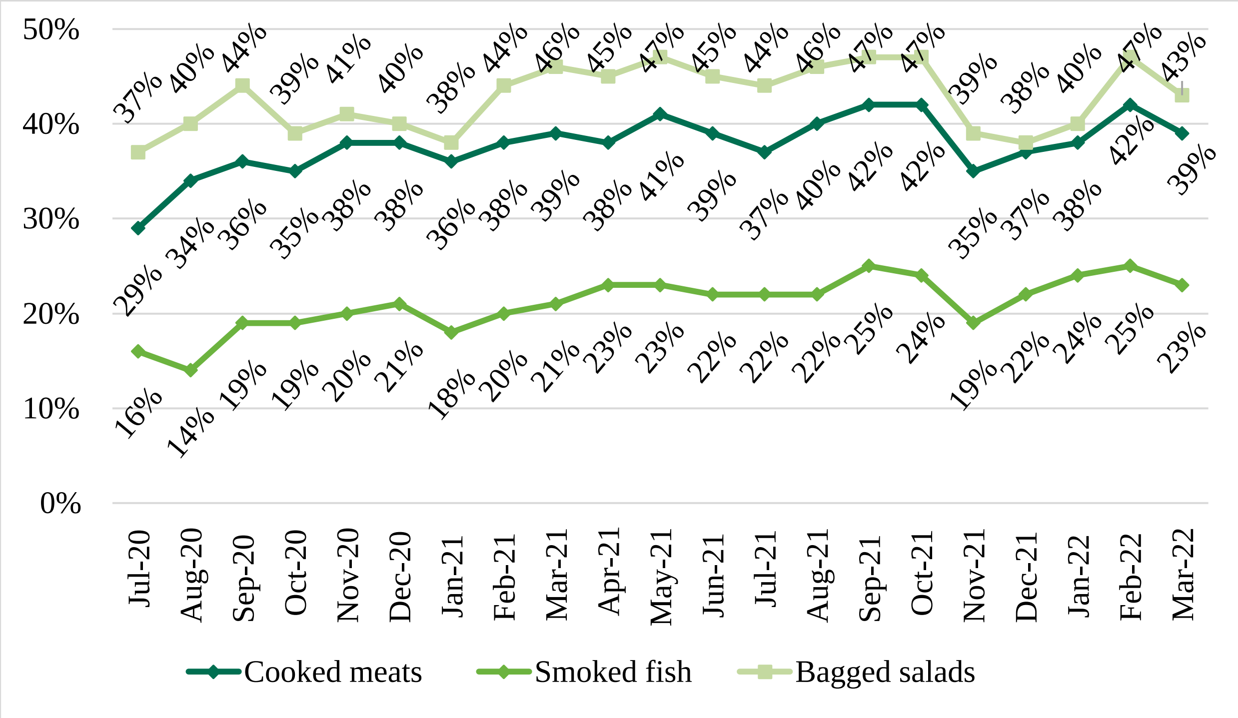
Latest figures (March 2022) show that 23% of participants reported eating smoked fish past the use-by date, which is not significantly different to the average across the previous 12 months (23%) but is significantly higher than when tracking first began in July 2020 (16%). Overall, the timeseries shows a gradual increase, since tracking began, in the proportion of participants who reported eating smoked fish past the use-by date, continuing the trend that was previously discussed in the COVID-19 tracker report (Figure 22).

In March 2022, nearly 2 in 5 participants (39%) reported eating cooked meat past the use-by date. This was not a statistically significant increase compared to the average figure across the previous 12-month period (39%), although this was a significant increase since tracking began in July 2020 (29%) (Figure 22).

In March 2022, over two fifths of participants (43%) reported eating bagged salad past the use-by date. This was not a statistically significant difference to the average across the 12 months prior (44%), although this was a significant increase since tracking began in July 2020 (37%) (Figure 22).

Overall, reports of eating cooked meat, smoked fish and bagged salad past the use-by date gradually increased across the timeseries; this continues the trend previously noted in the FSA’s COVID-19 tracker report.

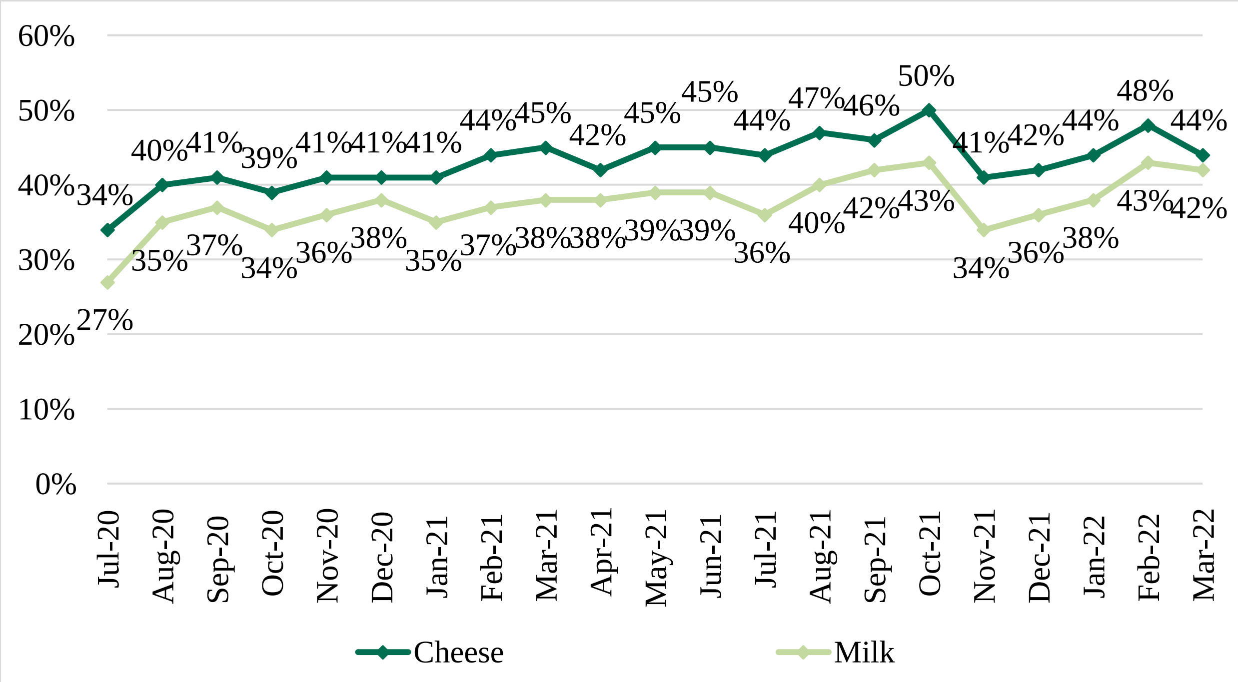
Figure 22: Participants who have eaten cooked meats, smoked fish and bagged salads that have gone past its use-by- date (July 2020 to March 2022)



COVID-19 Consumer tracker April 2020-October 2021, Consumer insights tracking survey November 2021-March 2022, Online, England, Wales and NI, adults who had eaten the specified food (aged 16-75). Indicative base sizes in March 2022 were: 1,836 (cooked meats), 1,549 (smoked fish), 1,698 (bagged salad). Data shown combines all affirmative responses. Comparable data only available from July 2020 onwards.

Latest figures from March 2022 show that 42% of participants reported eating milk, and 44% reported eating cheese past the use-by date. These were not statistically significant differences when compared to the average across the previous 12-month period (45% cheese, 39% milk). Overall, reports of eating milk and cheese past the use-by date had gradually increased across the timeseries; this continues the trend previously noted in the FSA's COVID-19 tracker report (Figure 23).

Figure 23: Participants who have eaten cheese and milk that have gone past its 'use-by' date (July 2020 to March 2022)

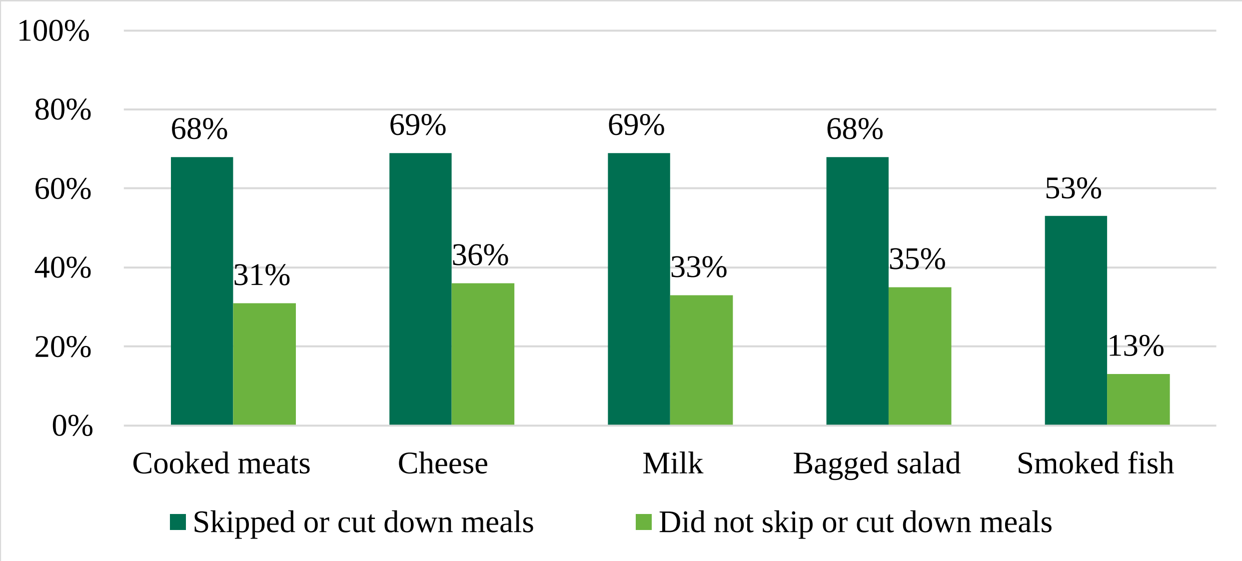


COVID-19 Consumer tracker April 2020-October 2021, Consumer insights tracking survey November 2021-March 2022, Online, England, Wales and NI, adults who had eaten the specified food (aged 16-75). Indicative base sizes in March 2022 were: 1,924 (milk), 1,890 (cheese). Data shown combines all affirmative responses. Comparable data only available from July 2020 onwards.

As described in the previous COVID-19 tracker publication, participants who reported skipping or cutting down the size of meals for financial reasons (because they could not afford to buy more food), were significantly more likely to report eating cooked meats, cheese, milk, smoked fish and bagged salads past the use-by date than participants who had not skipped or cut the size of meals for financial reasons. This finding has been evident since tracking began, and analysis of latest data (November 2021 – March 2022) indicates that this trend continues.

In March 2022, for example, participants who report cutting down the size of meals or skipping meals because they could not afford to food were significantly more likely to report that they or someone in their household had eaten cheese (69%), bagged salad (68%), milk (69%), cooked meats (68%) and smoked fish (53%) past the use-by date, compared to those who had not skipped meals or cut down the size of meals for financial reasons (cheese 36%, bagged salad 35%, cooked meat 31%, milk 33%, smoked fish 13%) (Figure 24).

Figure 24: Participants who ate food past its use-by date, and did or did not report cutting down or skipping meals for financial reasons (because they could not afford to buy food) (March 2022)



Consumer insights tracking survey March 2022, Online, England, Wales and NI, adults who had eaten the specified food (aged 16-75). Indicative base sizes in March 2022 were: 1,836 (cooked meats), 1,549 (smoked fish), 1,698 (bagged salad), 1,924 (milk), 1,890 (cheese).

Annex

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

Wave	Fieldwork dates	Sample size
1	10 to 13 April 2020	2,039
2	8 to 12 May 2020	2,040
3	12 to 15 June 2020	2,045
4	10 to 14 July 2020	2,068
5	14 to 17 August 2020	2,071
6	18 to 21 September	2,065
7	16 to 20 October 2020	2,067
8	13 to 16 November	2,023
9	11 to 15 December	2,073

Wave	Fieldwork dates	Sample size
10	15 to 18 January 2021	2,131
11	12 to 15 February 2021	2,047
12	12 to 15 March 2021	2,013
13	16 to 19 April 2021	2,049
14	14 to 18 May 2021	2,043
15	11 to 14 June 2021	2,047
16	16 to 19 July 2021	2,051
17	13 to 17 August 2021	2,065
18	13 to 15 September 2021	2,064
19	15 to 18 October 2021	2,059

Annex 2 Fieldwork dates and sample sizes CO2 shortages weekly survey

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

Annex 3 Fieldwork dates and sample sizes - consumer insights tracker survey

Between November 2021-January 2022, the survey was commissioned fortnightly, with some questions commissioned monthly and others commissioned every wave (fortnightly). See Annex 4 for full list of survey question. From February 2022 onwards the survey was only commissioned monthly only.

Wave	Fieldwork dates	Survey questions	Sample size
1	12 to 16 November 2021	All survey questions	2,046
2	26 to 30 November 2021	Fortnightly questions only	2,071
3	10 to 14 December 2021	All survey questions	2,058
4	17 to 21 December 2021	Fortnightly questions only	2,029
5	7 to 10 January 2022	All survey questions	2,031
6	21 to 24 January 2022	Fortnightly questions only	2,068
7	11 to 14 February	All survey questions	2,094
8	11 to 14 March	All survey questions	2,016

Annex 4 Consumer insights tracker survey questions

Fortnightly questions (asked in all survey waves).

Q1. Which, if any, of the following applies to you? [Please select all that apply.]

a) I have been advised to self-isolate because I have been contacted via the NHS ‘test and trace’ scheme or because I have returned from a trip to another country that requires self-isolation on return

b) I am choosing to self-isolate for another reason

c) I, or a member of my household, have suspected Covid-19 symptoms

d) I have physical or mental health condition(s) or illness(es) that has lasted or is expected to last 12 months or more

e) None of these [Exclusive]

f) Prefer not to say [Exclusive]

Q2. Please think about the food products that you usually prefer to buy. These might be specific types of food or particular brands, or products you prefer for some other reason.

Thinking about each of the following types of food, in the last week, have any of your preferred products been unavailable where you usually buy them when doing your food shopping? By unavailable, we mean that your usual or preferred product was out of stock. If you have food delivered to your home, this would mean that the product could not be delivered or was substituted. [Please select all that apply.]

a) Raw poultry (for example chicken, turkey, goose and duck)

b) Raw red meat for example, beef, lamb, pork

c) Raw Sausages and Bacon

d) Fresh fish or seafood (for example, cod, salmon or prawns)

e) Pre-cooked meats (for example, ham)

f) Fresh milk

g) Cheese

h) Yoghurts

i) Eggs

j) Frozen foods (such as frozen meat, frozen fish, frozen vegetables or frozen chips)

k) Ready meals

l) Baby food

m) Baby formula milk

n) Bread

o) A ‘free-from’ product (such as gluten free, dairy free, wheat free etc)

p) Fresh vegetables

q) Fresh fruit

r) Other

s) None of the above

Q3. [Ask those who have experienced food shortages i.e., selected a food item in Q2] Thinking about the following types of food products you said were unavailable, were you able to find a suitable substitute when doing your food shopping? For example, a suitable substitute might be another similar product or a different brand of the same product.

a) Raw poultry (for example chicken, turkey, goose and duck)

b) Raw red meat for example, beef, lamb, pork

c) Raw Sausages and Bacon

d) Fresh fish or seafood (for example, cod, salmon or prawns)

e) Pre-cooked meats (for example, ham)

f) Fresh milk

g) Cheese

h) Yoghurts

i) Eggs

j) Frozen foods (such as frozen meat, frozen fish, frozen vegetables or frozen chips)

k) Ready meals

l) Baby food

m) Baby formula milk

n) Bread

o) A ‘free-from’ product (such as gluten free, dairy free, wheat free etc)

p) Fresh vegetables

q) Fresh fruit

r) Other

i. I was always able to find a suitable substitute
ii. I was sometimes able to find a suitable substitute
iii. I was not able to find a suitable substitute

Q5. In the past week, have you, personally, noticed that the price of your food shopping has changed? [Please select one answer only]

a) It got cheaper

b) It stayed the same

c) It got more expensive

d) Don’t know

e) I haven’t done any food shopping in the past week

Q6. In the last week, have you or anyone in your household done any of the following? [Please select all that apply]

a) Purchased more non-perishable (store cupboard) food than we usually would

b) Purchased additional food in preparation for Christmas (this option was only included in Waves 1 to 4 , it was removed from wave 5 onwards, after the Christmas period)

c) Purchased more fresh food than we usually would, and frozen it for later

d) Changed what we usually purchase, for products with a longer shelf-life

e) Purchased raw ingredients to make products that we'd usually buy pre-packaged (for example, purchasing flour to make bread, rather than pre-packaged bread)

f) Purchased more fuel (petrol/diesel) than we usually would

g) None of these

h) Don't know

Q7. [Only asked in Waves 1-4 (before Christmas and New Year)] Thinking about this Christmas (2021) and New Year (2022). How concerned, if at all, are you personally about the following, when doing your food shopping? [Please select one answer only for each statement]

a) The availability of food

b) The quality of food

c) The safety of food

d) The price of food

i. Highly concerned
ii. Somewhat concerned
iii. Not very concerned
iv. Not concerned at all
v. Not applicable

Q8. At the moment, how concerned, if at all, do you personally feel about each of the following topics? [Please select one answer only for each statement]

a) The 'healthiness' of food in my diet (for example, the number of calories, fat, sugar or salt in the food you eat or the nutritional content of your diet)

b) Food availability/food shortages

c) Animal welfare in the food industry

d) The safety of food produced in the UK

e) The safety of food imported from outside the UK

f) The quality of food produced in the UK

g) The quality of food imported from outside the UK

h) Food prices

i) Sustainability / the impact of food production on the environment

i. Highly concerned
ii. Somewhat concerned
iii. Not very concerned
iv. Not concerned at all
v. Don't know

vi. I don’t know enough to comment

Q9. How confident are you in the food supply chain? That is all the processes involved in bringing food to your table [Please select one answer only]

a) Very confident

b) Fairly confident

c) Not very confident

d) Not at all confident

e) It varies

f) Don’t know

Q10. How confident are you that those involved in the food supply chain in the UK… [Info button: By ‘those involved in the food supply chain’ we mean for example, farmers, manufacturers and shops and supermarkets.] Please select one answer only for each statement

a) Ensure that food is safe to eat

b) Ensure there is enough food available for people to eat

c) Ensure there are affordable food options for everyone

d) Ensure that food is of a high quality

i. Very confident
ii. Fairly confident
iii. Not very confident
iv. Not at all confident
v. It varies
vi. Don’t know

Q11. The Food Standards Agency (FSA) is the Government Agency responsible for food safety in England, Wales and Northern Ireland. How confident are you that the Food Standards Agency… [Please select one answer for each statement only]

a) …can be relied upon to protect the public from food-related risks (such as food poisoning or allergic reactions from food)?

b) …is committed to communicating openly with the public about food-related risks?

c) …takes appropriate action if a food-related risk is identified?

i. Very confident
ii. Fairly confident
iii. Not very confident
iv. Not at all confident
v. Don’t know / Don’t know enough to say

Q12. The Food Standards Agency (FSA) is the Government Agency responsible for food safety in England, Wales and Northern Ireland. How much do you trust or distrust the Food

Standards Agency to do its job? That is to make sure that food is safe and what it says it is. [Please select one answer only]

a) I trust it a lot

b) I trust it

c) I neither trust nor distrust it

d) I distrust it

e) I distrust it a lot

f) Don't know / Don't know enough to say

Monthly questions (asked in waves 1, 3 ,5 ,7 and 8)

Q1m. 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? [Please select one answer only]

a) Very worried

b) Somewhat worried

c) Not very worried

d) Not at all worried

e) Don't know

f) Prefer not to answer

Q2m. To what extent, if at all, are you worried you/your household will not be able to afford food in the next month? [Please select one answer only]

a) Very worried

b) Somewhat worried

c) Not very worried

d) Not at all worried

e) Don't know

f) Prefer not to answer

Q3m. In the last month have you cut down the size of your meals or skipped meals for any of the following reasons? [Please select one answer for each statement.]

a) You did not have enough money to buy food

b) You (or others in your household) were not well enough to shop or cook food

c) You had no means to get to the shops to buy food

d) You were unable to get a delivery of food or obtain it in other ways

i. Yes, this happened every week
ii. Yes, this happened some weeks but not every week
iii. Yes, this happened just one week in the last month
iv. No, never
v. Don't know/can't remember
vi. Prefer not to answer

Q4m. In the last month, how often, if at all, have you used a food charity or food bank? [Please select one answer only]

a) Every week

b) Some weeks but not every week

c) Just one week in the last month

d) I have not done this in the last month

e) Don't know/can't remember

f) Prefer not to answer

Q5m. In the last month have you or anyone in your family eaten any of the following foods that has gone past its 'use-by' date? [Please select one answer for each food.]

a) Cooked meats

b) Smoked fish

c) Bagged salads

d) Cheese

e) Milk

i. Yes, this happened every week
ii. Yes, this happened some weeks but not every week
iii. Yes, this happened just one week in the last month
iv. No, never
v. We haven't eaten this in the last month
vi. Don't know/can't remember
vii. Prefer not to say