



Delivered by  
**Scotland Food & Drink  
Partnership**

# Provenance and its importance to Scottish food and drink products

Produced by Trinity McQueen



## **KEY INSIGHT**

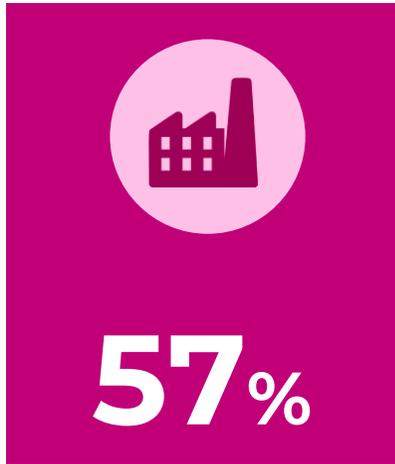
**Food and drink with Scottish provenance can boost likelihood to purchase and the price shoppers are willing to pay. However, shoppers need a credible reason to buy – this should be the specialist producers involved**



# Over 6 in 10 Scottish shoppers want to spend more of their money on local food & drink

Around a third of GB wide shoppers also want to spend more of their money on food and drink produced in Scotland

% Agree / agree strongly (GB)



Where my food is being made or produced is becoming increasingly important to me



I plan to buy more locally produced products in the next 6 months



I want to spend more of my money on local food and drink



I want to spend more of my money on food and drink produced in Scotland

Scotland



**67%**

**59%**

**64%**

Almost double

**66%**

# Outside of Scotland there is a romanticised perception of Scottish food and drink

With products being made by specialists to a higher quality

The benefits of buying fresh food and drink produced in Scotland tend to be higher across all benefits, suggesting it's easier to see the benefits of categories that are produced rather than manufactured. Categories like biscuits, confectionary and alcohol have a harder job to establish benefits of coming from Scotland

## Top Benefits of buying fresh food and drink in produced and manufactured in Scotland



*"They will have a lower environmental impact as they will not have been imported"*

*"You just picture big green fields, rainy weather and plenty of room for cattle to roam around on. It all adds to how the products can't be replicated anyway else"*

1st

**It helps support the local economy**

**There are specialist producers based in Scotland**

**It helps support the local economy**

*"Scotch is the best because it can't be made anywhere else"*

2nd

**Familiar with Scottish brands**

**It helps support the local economy**

**There are specialist producers based in Scotland**

3rd

**There are specialist producers based in Scotland**

**It is higher quality**

**The traceability of ingredients**

*"Generally, I see the standards of welfare in Scotland as higher"*

*"They are fresher and of a higher quality"*

*"I trust the quality of Scottish products"*

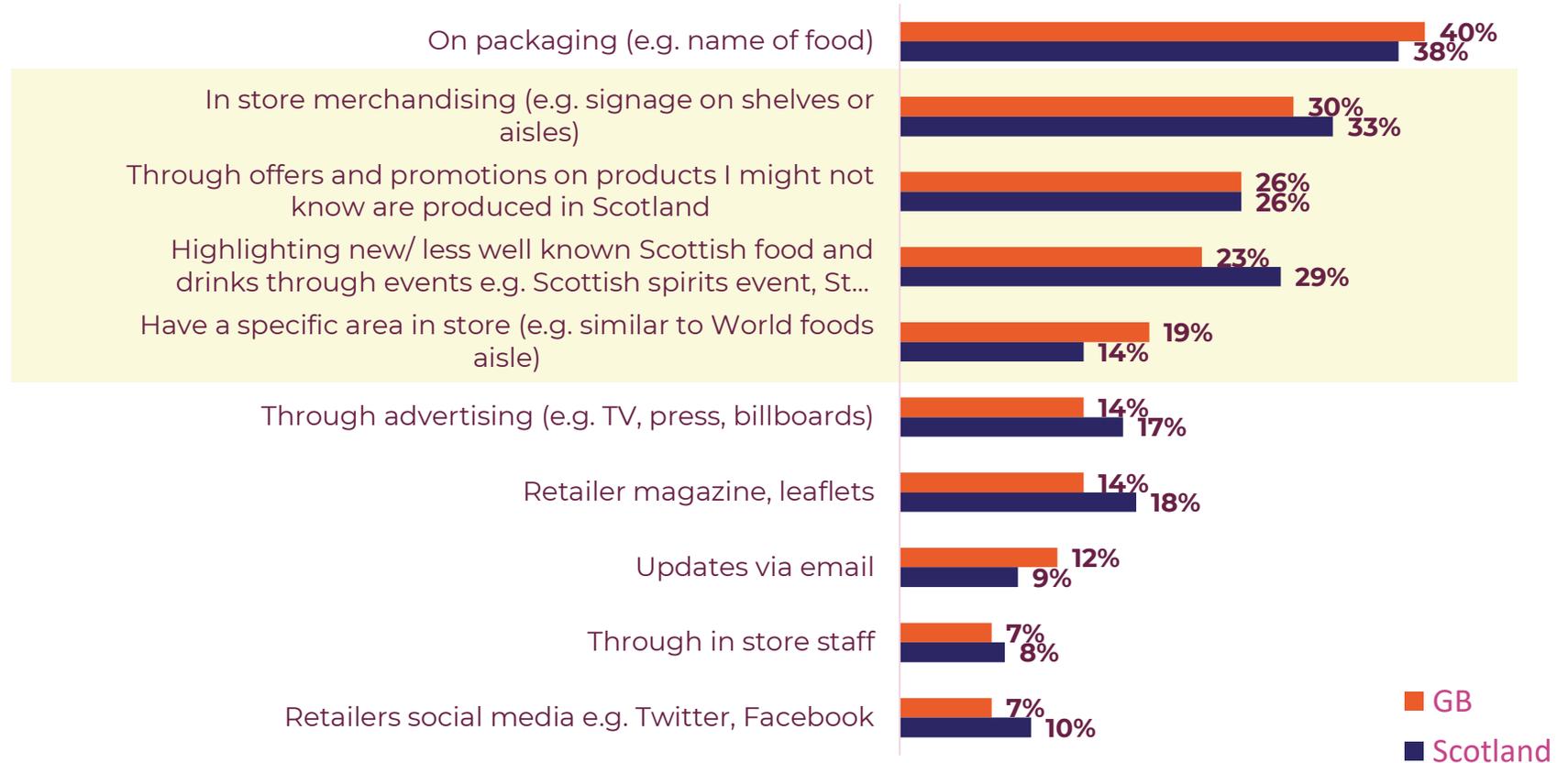
Q: B7 What are the benefits of buying fresh food and drinks that's produced/ manufactured  
Base: Scottish (587) Welsh (308) English (856)

# There is a clear need to sign post Scottish food and drink brands...

Outside of traditional categories such as shortbread and Whisky

## How would you like to see retailers communicate the origin of their products (e.g. from Scotland)...?

Not satisfied with retailers *Highlighting Scottish food and drink during events*

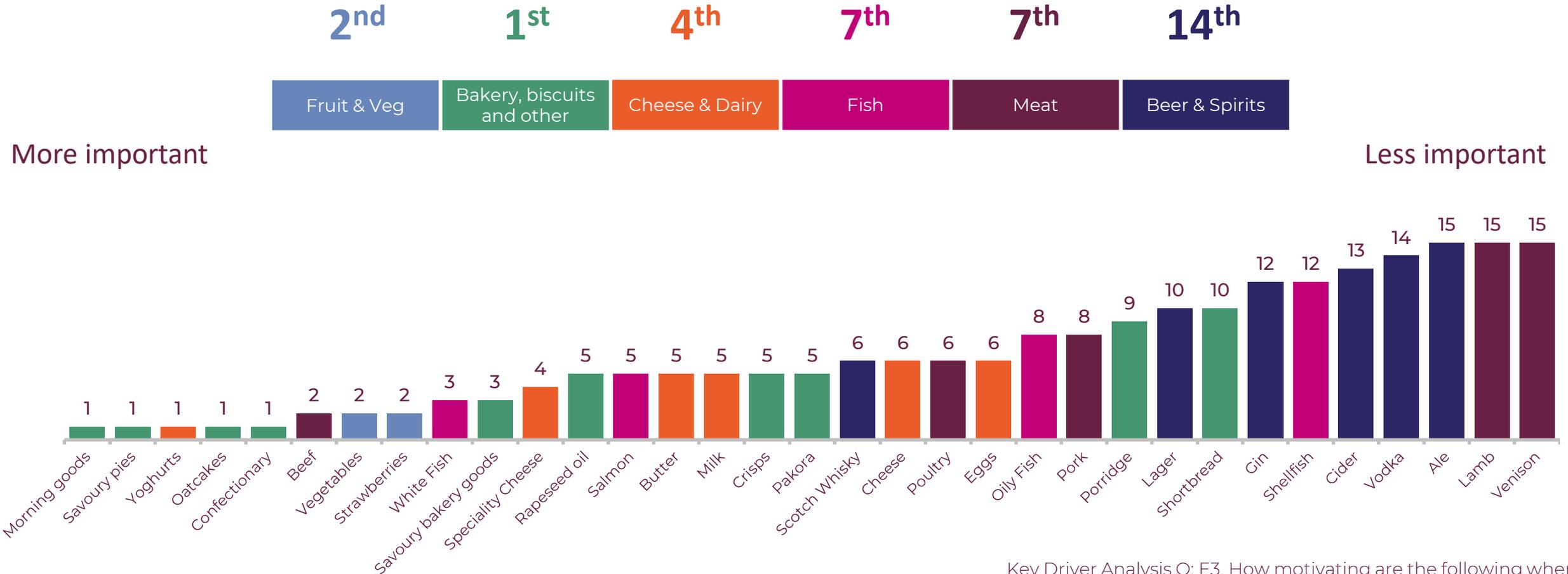


Q: D5b. PROVENANCE COMMUNICATION And including anything you've already mentioned, how would you like to see retailers communicate the origin of their products (e.g. from Scotland)...?

Base: GB (1,000) Scotland (587)

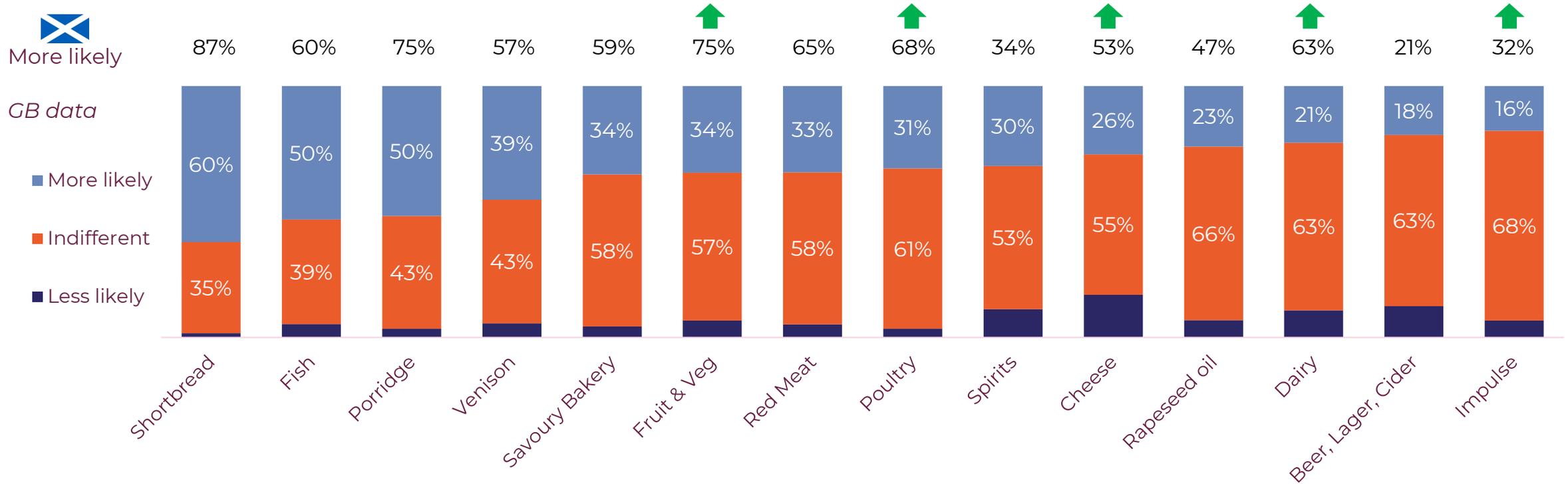
# Morning Goods, Beef and Fruit & Veg would benefit most from featuring the Scottish flag on pack. It plays less of a role in driving purchase for Beers & Spirits.,

Drivers analysis: Ranking the importance of 'It features a Scottish Flag on pack'



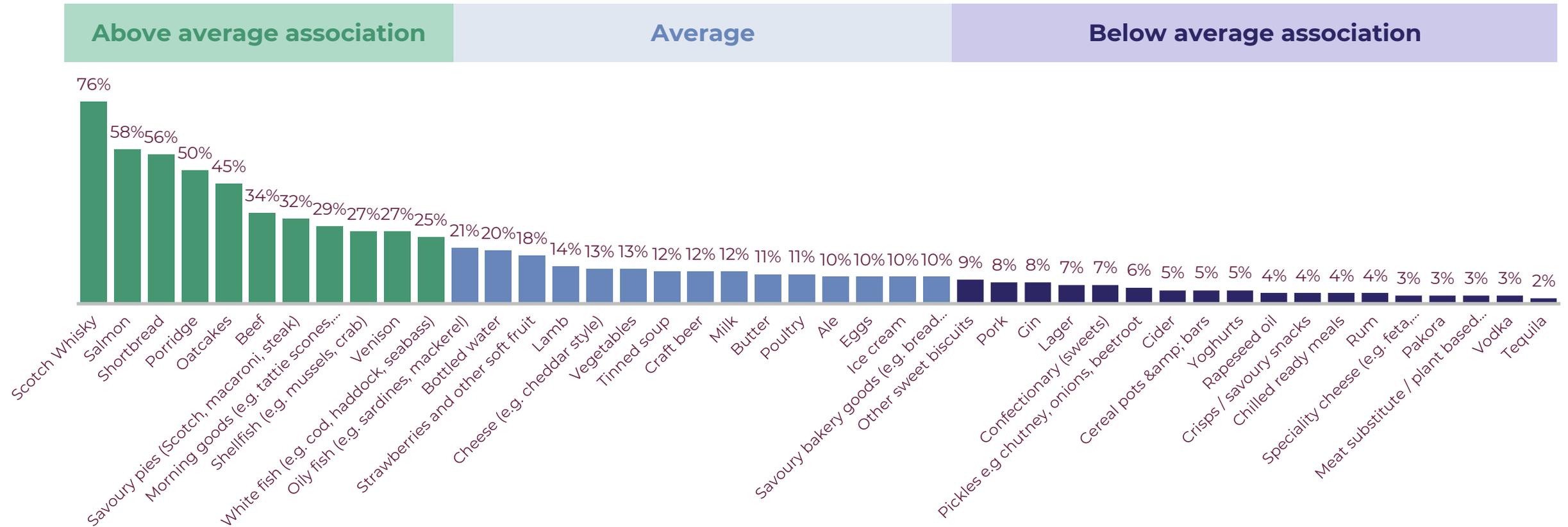
# Across most categories, food & drink produced in Scotland is likely to boost purchase

Likelihood to purchase following categories if produced in Scotland



# There's a knowledge gap

There are relatively few categories that have strong associations with Scotland



# Different levers must be pulled across each category

This will maximise the strength in quality associated with Scottish food and drink

However across all categories, linking this strength in quality to the food and drink being produced by **specialists in Scotland** will help drive uptake of these products

## What's important in driving shoppers to purchasing the following categories if produced in Scotland?

### Beer & Spirits

Linking **superior taste** to beers and spirits produced in Scotland by **specialists** in the field

### Meat

Clear associations with being  **fresher** by **featuring ingredients produced on Scottish farms**

### Fish

Highlighting the **environmental benefits** in combination with how it **supports the Scottish economy**

### Cheese & Dairy

Direct links to how the **Scottish economy is supported** through **featuring ingredients from Scottish farms**

### Fruit & Veg

**Maximising 'fresh' cues through using the Scottish flag on pack**

### Bakery & biscuits

The **Scottish flag** on traditional bakery products can **reinforce the fresh cues** associated with such Scottish products

# Within Beer and Spirits, highlighting how these products are made by specialists in Scotland and how that results in superior taste is pivotal

## Beer & Spirits

Linking **superior taste** to beers and spirits produced in Scotland by **specialists** in the field

### Top 7 drivers to buy Scottish within Beer and Spirits



	<u>Beer</u> (Ale, Lager, Cider)	<u>Spirits</u> (Scotch Whisky, Gin, Vodka)
	14.5	9.8
	10.6	10.2
	8.9	6.1
	5.9	7.8
	5.4	7.5
	4.3	8.5
	9.0	3.3

### Category differences

- The importance of the specific origin (place/farm) within Beer is largely driven by Cider (17.9)
- Attributes inherently linked to Scotland have higher importance in driving likelihood to purchase Scottish produced Spirits vs. Beer
- Traditional Scottish methods used to produce it and specialists who carry out this process is key for driving purchase of Whisky. How could we better leverage this for other spirits?

# The relevance of being produced in Scotland and the level of detail varies by subcategory, tier and where the product is purchased



Mentions of specific location and producers - tell the product story here

- Smaller stores and independent stores
- Premium brands
- High ticket items e.g. steaks, organic, asparagus
- Where there is an authentic story to tell
- Fresh items
- Less frequent purchases

Additional information on provenance (e.g. Loch Lomond) and imagery

## Where it's relevant...

- Supermarkets
- Mid tier own label, brands and counters
- Premium own label e.g. M Signature, Extra Special
- Discretionary products e.g. breakfast bakery, standard ready meals, burgers

Use of 'Scotch'/'Scottish' in product name and flag icon on pack

- Supermarkets
- Value own label e.g. savers
- Lower ticket items e.g. potatoes, sandwich meat
- Everyday products e.g. mince beef, bread rolls
- Habitual purchases e.g. milk

# On pack imagery acts as a mental short cut for shoppers on autopilot. They play a big role in how shoppers perceive quality and provenance

## Imagery is key

- Flags are simple, especially when shoppers are on autopilot
- Flags can be interpreted as investment in Scotland/British producers, it can mean quality, it can mean lower food miles = fresher & lower carbon footprint



*"Its like a sea of flags in Aldi, I know from in store and the ads on TV that they get what they can from local farms"*

## 'Local enough'

- Shoppers often articulate the importance of local
- For more habitual items like milk, potatoes etc. Shoppers are happy enough to buy something that is 'local enough'
- Tesco's made-up farm brands is enough of a mental shortcut for shoppers and elevates what was once a basics own label brand



*"I've never given it that much thought, I just assume its made locally which is why its cheaper"*

## Transparency and credibility

- Brands are more likely to be challenged on their credibility
- When paying a premium for products, its more likely to be interrogated
- Few are likely to go to deep but QR codes and sign posting to other sources can be enough to feel reassured that claims are real
- On pack – keep messaging simple



*"It's just reassuring to know the info is there is more info if I need it, I'll probably take a look some day"*

# Link freshness with products being produced on Scottish farms to drive purchase of meat

## Meat

Clear associations with being **fresher** by **featuring ingredients produced on Scottish farms**

### Top 7 drivers to buy Scottish within Meat

<i>It's fresher by being made in Scotland</i>	<b>10.3</b>
<i>It was made by specialists in Scotland</i>	<b>10.0</b>
<i>It supports local businesses / producers</i>	<b>8.7</b>
<i>It features ingredients produced on Scottish farms</i>	<b>8.7</b>
<i>It's made with local produce or ingredients</i>	<b>8.5</b>
<i>Food standards are higher vs. elsewhere</i>	<b>7.3</b>
<i>It features a Scottish flag on pack</i>	<b>6.6</b>

### Game (Venison)

8.0

3.7

16.7

8.3

8.5

7.3

3.2

### Poultry

10.2

12.1

3.2

12.9

11.9

8.6

5.5

### Red Meat (Beef, Pork, Lamb)

12.1

7.9

7.9

7.5

7.1

8.9

8.0

### Category differences

- Communicating freshness through 'local' Scottish farms and producers will be key within the three meat categories
- The Scottish flag will have a larger impact on meat products that are more traditional to Scotland (e.g. Beef) and plays less of a role in Game and Poultry
- Food standards is only important to these three meat categories – which is likely to become even more of an issue going forward

# Supporting the local economy and sustainability should be communicated to fish shoppers

## Fish

Highlighting the **environmental benefits** in combination with how it **supports the Scottish economy**

### Top 7 drivers to buy Scottish within Fish (salmon, shellfish, white fish, oily fish)

*It features ingredients produced on Scottish farms*

10.3

*It supports the Scottish economy as a whole*

9.0

*It was made by specialists based in Scotland*

8.2

*It hasn't travelled far to get to store*

8.1

*It has a low carbon foot print*

7.9

*Its fresher by being made in Scotland*

7.0

*It features a Scottish flag on pack*

6.9

### Category differences

- Continuing to highlight the importance of the fish industry to the Scotland economy will help encourage purchase of Scottish produced products
- As sustainability becomes a focus, especially in the fishing industry, communicating the environmental benefits (e.g. reduced carbon footprint) can help further drive uptake – especially for White Fish
- Taste is a relatively more important factor when it comes to driving purchase of Scottish Salmon

# Showing how the Scottish economy is supported through the sale of Dairy is important

While the Scottish flag can play a role in driving sales within Dairy

## Cheese & Dairy

Direct links to how the **Scottish economy is supported** through **featuring ingredients from Scottish farms**

### Top 7 drivers to buy Scottish within Cheese & Dairy

*It supports the Scottish economy as a whole*

12.1

*It features ingredients produced on Scottish farms*

11.2

*Its fresher by being made in Scotland*

10.0

*It features a Scottish flag on pack*

9.9

*It was made by specialists based in Scotland*

9.3

*It supports local businesses / producers*

7.5

*It's made to high British standards*

5.2

### Cheese

(Cheese and Specialty Cheese)

12.0

15.6

5.3

6.9

9.4

13.0

5.0

### Dairy

(Eggs, Butter, Milk, Yoghurts)

12.1

9.0

12.4

11.3

9.2

4.8

5.2

### Category differences

- Focus on linking how the Scottish economy is supported through the sale of local cheeses (not speciality) and eggs specifically
- Across most of the dairy products, with the exception of Yoghurts, freshness plays a vital role in the purchase of Scottish products, and can be driven further through the use of the Scottish flag on pack

# Perceptions of increased freshness with Scottish Fruit & Veg need to be leveraged

This can be done through the use of the Scottish flag on pack

## Fruit & Veg

### Maximising 'fresh' cues through using the Scottish flag on pack

#### Top 7 drivers to buy Scottish within Fruit & Veg (Strawberries and other soft fruits, vegetables)

*Its fresher by being made in Scotland*

19.2

*It features a Scottish flag on pack*

15.3

*It features ingredients produced on Scottish farms*

10.7

*It was made by specialists based in Scotland*

8.2

*It supports the Scottish economy as a whole*

6.7

*It has a superior taste*

6.4

*Its made with local produce or ingredients*

5.1

#### Category differences

- Maximising fresh associations with fruit and veg produced in Scotland by including the Scottish flag on pack can help drive purchase of Scottish fruit and veg – especially for Strawberries and other soft fruits
- The benefits to local Scottish farms and businesses can help further drive purchase among Scottish shoppers

## Different levers need to be pulled across the remaining categories

Among those that are more readily associated with Scotland (Porridge, Shortbread) leveraging heritage ties is crucial

### Other

The Scottish flag on traditional bakery products can reinforce the fresh cues associated with such Scottish products

#### Top 7 drivers to buy Scottish within Other

**Ambient**  
(Rapeseed oil)

**Breakfast**  
(Porridge)

**Impulse**  
(Confec, Crisps, Pakora)

**Sweet bakery**  
(Shortbread)

**Savoury bakery**  
(Oatcakes, pies, Savour baked goods)

#### Category differences

It features a Scottish flag on pack

12.3

7.1

3.6

11.5

4.6

18.4

Its fresher by being made in Scotland

10.9

6.5

8.1

7.8

10.0

12.8

It was made by specialists based in Scotland

7.3

3.7

15.4

7.0

13.2

5.0

It supports the Scottish economy as a whole

6.5

9.0

9.3

7.8

5.5

4.4

It hasn't travelled far to get to store

6.3

15.8

2.3

5.1

3.2

6.5

It can't be produced this way anywhere else

6.1

2.9

16.1

5.1

13.6

3.3

You know the farm, place or region it was produced

5.8

12.1

4.8

4.7

5.1

5.6

- Leveraging the current heritage ties to shortbread and porridge can drive sales within these two sub-categories
- The Scottish flag does have a role to play on impulse and savoury bakery categories where relevant
- Knowing the exact place/farm Scottish rapeseed oil is produced is a key driver specific to this sub-category only