



Delivered by
**Scotland Food & Drink
Partnership**

Maximising Provenance

Welcome

The Knowledge Bank is the Insight division of the Scotland Food & Drink Partnership and challenged with the task of identifying and developing new market opportunities using, research, insight, market data and knowledge to deliver sustainable growth for the Scottish food and drink industry.

Focusing on today's markets and tomorrow's opportunities, The Knowledge Bank will work across the Scottish food and drink industry to stimulate thinking and encourage action.

Supported by Scottish Government via the SF&D Partnership Food and Drink Recovery Plan

Why should your brand invest in Scottish Provenance?

- Scottish and locally produced food and drink is a big footfall driver to store
- More widely Scottish provenance can reinforce a range of key drivers to store including providing specialist and good quality food & drink products
- Scottish provenance is important across all product tiers from Own Label value range to brands
- Consumers across GB have a positive perception of products made in Scotland – tradition, quality, supporting the local economy, traceability and in Scotland lower food miles
- It is important to tell the story about your provenance on packaging and within marketing
- Some categories have key attributes that should be dialled up to tell an even more engaging story about their provenance
- Consider what marketing you undertake for your products and your messaging

Scottish food and drink can help drive shoppers to store

LIKELY TO PAY MORE
FOR SCOTTISH FOOD &
DRINK



All the brands in one place

ASDA



TESCO

Sainsbury's

Opportunity: Ensure the best Scottish food & drink brands are in store with sign posting for new and surprising products

Seasonal quality



Opportunity: Continue to Showcase Scottish food & drink on pack

Best of British

M&S

WAITROSE
& PARTNERS

EST. 1884

Opportunity: Showcasing Scottish specialists to build positioning alongside showcasing the best of British

Buying local



Opportunity: Ensure availability of locally sourced food & drink across store formats

Scottish provenance specifically is one of the most compelling ways to demonstrate quality to consumers from across GB but especially Scottish customers

Quality perceptions were driven by many by strong association with freshness. For Scottish shoppers, it is also about the shorter distances travelled too

*"Knowing that my groceries **haven't travelled far**, and are **therefore fresher** is what sets Scottish produce apart"*

*"Scottish products rack up **fewer food miles** which is always a good thing"*

"I love Scottish Strawberries; they always taste so fresh and juicy"

The simplicity and clarity of including 'Scottish' in more product names can drive links with Scotland and quality

*"They actually put their **own name in the product title**, like Scottish Salmon and Scottish Shortbread"*

*"You'd know it was **from Scotland because it's called Scotch**"*

"If it says it's Scottish salmon, you don't really have to question where it's from"

*"It's easier to think of Scottish products **as a lot of them have Scotch or Scottish in the title. I can't think of a lot of English products like that**"*

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, confectionery and alcohol have a harder job to establish benefits of coming from Scotland

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



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

1st

2nd

3rd

"They are fresher and of a higher quality"

It helps support the local economy

There are specialist producers based in Scotland

It helps support the local economy

Familiar with Scottish brands

It helps support the local economy

There are specialist producers based in Scotland

There are specialist producers based in Scotland

It is higher quality

The traceability of ingredients

"I trust the quality of Scottish products"

"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"

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

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

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

These strong quality perceptions are linked to Scotland's unique specialist producers

The Scottish environment is linked to **quality**. Shoppers believe categories such as fresh meats (beef, sausages), smoked fish (salmon, haddock), Whisky, and shortbread cannot be recreated elsewhere due to the **traditional processes, environmental conditions and ingredients** used to make them.

Well known brands offer short cuts for shoppers to they can more readily conjure up images of the landscape, producers and processes involved

It needs to be easy for shoppers to draw a link between the producers and the quality. For example, the shoppers we spoke to could see the natural link to products such as **craft beer** and **gin where** due to the botanicals used and fresh water for processing that offer a sense of quality and specialism to the product.

There's a feeling of products being **home grown**, like biscuits and fish

They are **experts** in whisky because they **invented it** and crafted it. That's what makes it **taste so good**

The quality is in the **way the products are produced**, the **raw materials** and **how they are grown**

It's the **environment** and **not being as polluted**. Even their water is well known

Shoppers want to see packaging containing brief information on origin

Then have further options to find out more if they desired

Origin

- Stating the name of the country or region where the product originates
- Who has produced it, including names of farmers
- Meat/fruit/veg shoppers were more concerned about the origin of their produce

"I think country of origin should be clearly visible on all products"

"I rely on stores to clearly mark country of origin on shelves"

Welfare

- Customers are interested in whether their product is responsibly sourced, for example Fairtrade or Free Range
- Help inform ethical decisions made by customers
- Assured food standards e.g. Scotch Beef PGI

"Animal welfare labelled on the product"

"Should be told about "conditions of the workforce" and "amount farmers get paid"

Design

- Clear and concise information, easy to read
- Could include a QR code which provides more information, doesn't clutter the label
- Large flag which can be seen at a glance
- Makes it easier for shoppers to find the products they are after

"I hate shopping and it would take longer to read a lot of details on packaging"

"clear labelling in bold letters" with a "line or two on the label"

Shoppers look to different channels for inspiration on Scottish food & drink

Magazine and leaflets

- Brochures or leaflets containing information on origin were welcomed
- Easier for customers who don't use email or social media
- A leaflet for each region or food group was suggested

*"Presented in a free magazine" or
"posters/leaflets in store"*

*"Magazines and papers, both online
and print versions"*

Online

- Information can be provided on the supermarket website, could also include customer reviews
- Using advertisements on television or social media to promote

*"I would like to see more advertising of
the products origin on supermarket
websites"*

*"I would for review online and see how
they are that way"*

In-store

- Large signposting in-store that would attract customers
- This could include posters/banners promoting deals or campaigns
- Making the most of end-of-aisle displays to promote

*"I would like clearer aisle signposting
within stores"*

*"Large signage on the aisles" that
"would attract my eye"*

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

Other

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

THE KNOWLEDGE BANK

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Thank you

info@theknowledgebank.scot

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