



Delivered by  
**Scotland Food & Drink  
Partnership**

# **The key role Scotland Food & Drink plays across GB**

Produced by Trinity McQueen

## **KEY INSIGHT**

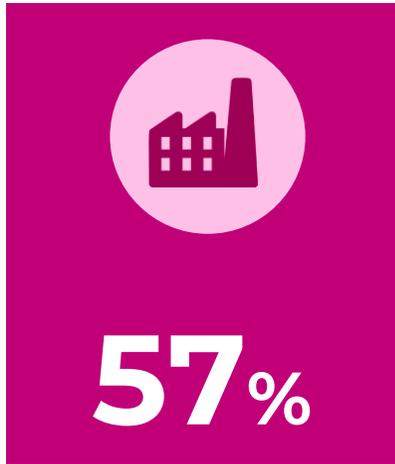
**Food and drink with Scottish provenance can boost the likelihood to purchase and the price shoppers are willing to pay. However, shoppers need a credible reason to buy – this should be the specialist producers involved**



# 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%**

# Nearly half of shoppers state they actively look out for origin of groceries when shopping

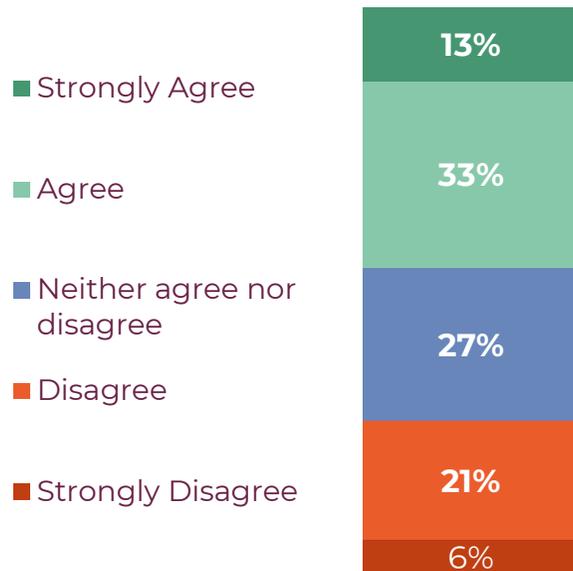
This is most important for younger shoppers

47%

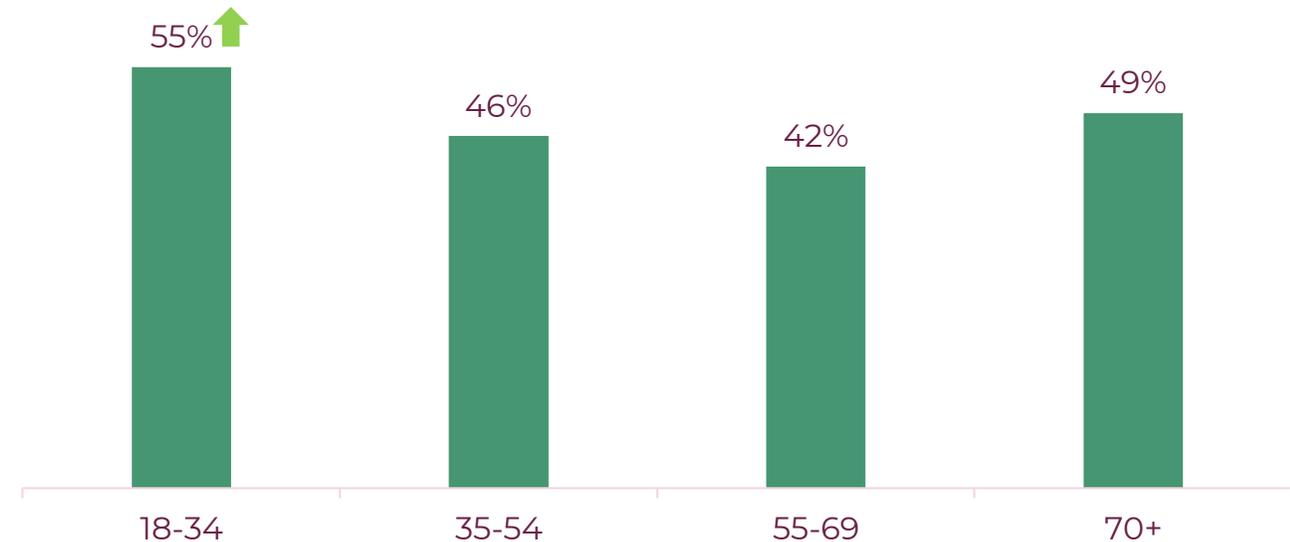
Actively look out for the country of origin when shopping for food & drink across all store formats. Consistent between GB and Scotland

Age is a factor in the importance of provenance with younger people saying they are more likely to look for the origin of their food

## Actively look out for the country of origin when shopping for food & drink



## % Agree / agree strongly they Actively look out for the country of origin when shopping for food & drink



↑ Significantly higher than other age groups

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

With products being made by specialists to a higher quality

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"*

1st

It helps support the local economy

There are specialist producers based in Scotland

It helps support the local economy

*"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"*

2nd

Familiar with Scottish brands

It helps support the local economy

There are specialist producers based in Scotland

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

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"*

## Scottish provenance specifically is one of the most compelling ways to demonstrate quality to all nations but especially Scottish customers

Quality perceptions were driven by many by strong association with freshness due to shorter distances travelled

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

*"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"*

*"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**"*

# **The key overarching positioning for Scotland food & drink is around the specialist producers who make it**

1. It provides a reason to believe
2. It links to quality which shoppers are willing to pay more for
3. It links to supporting the local economy



# Shoppers are driven to stores that support local and Scottish food and drink producers

## Retailer key drivers analysis – What drives shoppers to store



Supporting Scottish and local food producers is big driver to store for shoppers. It is a bigger driver still for Scottish shoppers

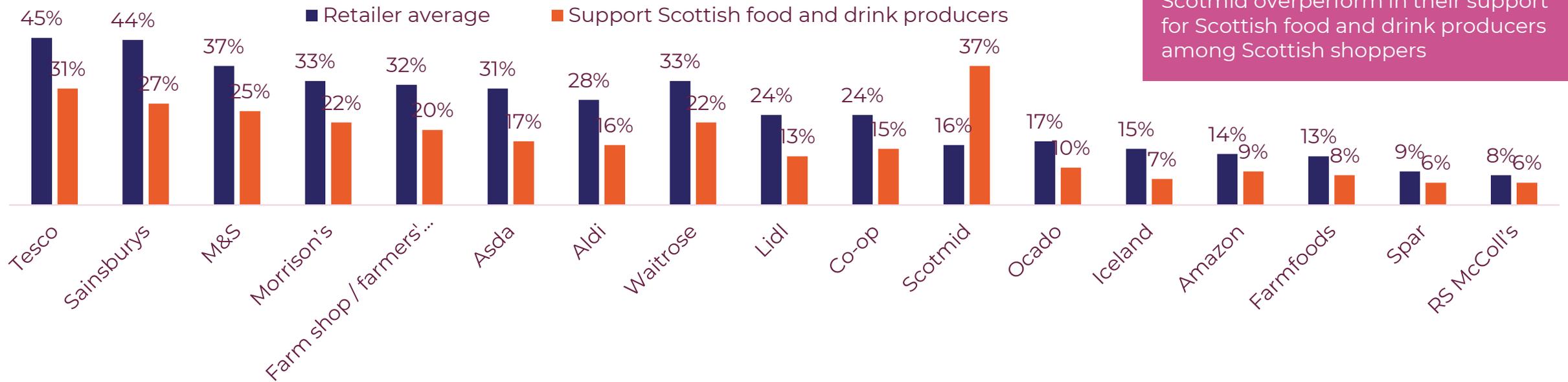
	GB	England	Scotland	Wales
<b>Support local and Scottish food producers</b>	12.6	12.5	<b>18.1</b>	8.6

# All retailers, except Scotmid, underperform in their support for Scottish food and drink products



## Brand associations with 'Support Scottish food & drink producers'

Endorsement for any retailer is higher in Scotland – although of the main supermarkets, only Co-op, Aldi, Lidl and Scotmid overperform in their support for Scottish food and drink producers among Scottish shoppers



44%	37%	38%	39%	41%	33%	33%	23%	29%	25%	17%	12%	13%	14%	11%	8%	6%
39%	30%	32%	38%	49%	29%	41%	15%	37%	31%	31%	8%	9%	8%	11%	9%	6%

# All retailers would benefit from greater ranging and promotion of Scottish food & drink

This would boost their brand credentials

## Correspondence mapping – retailer positioning by their food & drink credentials

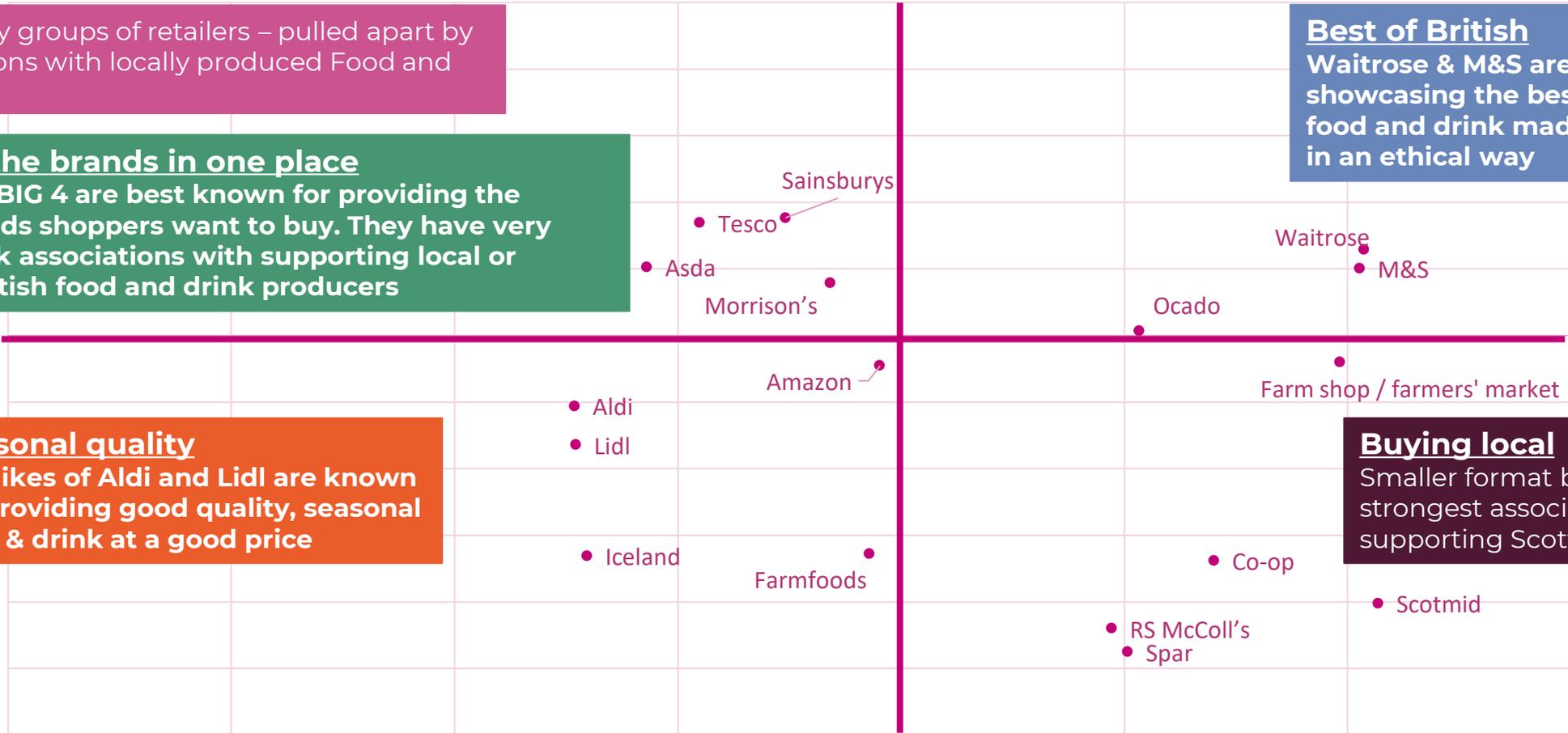
There are 4 key groups of retailers – pulled apart by their associations with locally produced Food and Drink

**All the brands in one place**  
The BIG 4 are best known for providing the brands shoppers want to buy. They have very weak associations with supporting local or Scottish food and drink producers

**Best of British**  
Waitrose & M&S are known for showcasing the best of BRITISH food and drink made by specialists in an ethical way

**Seasonal quality**  
The likes of Aldi and Lidl are known for providing good quality, seasonal food & drink at a good price

**Buying local**  
Smaller format brands have the strongest associations with supporting Scottish food & drink



Q: D1. RETAILER PERCEPTIONS You'll now see a number of statements and some grocery retailers. Please give your impressions of them, whether or not you have used them yourself.

Base: Retailer shoppers average (~450)

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

Outside of traditional categories such as shortbread and Whisky

There is clear evidence that more can be done to highlight new / less well-known Scottish F&D. Particularly round seasonal events



Not satisfied with retailers highlighting Scottish food and drink during events



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



There is a greater expectation for M&S to provide on packaging (47%) and for JS and Scotmid to provide via instore merchandising (37% & 39% respectively)

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)

# There is a desire for more Scottish produce in larger retailers

This is currently not being met



*"In Asda I noticed this pizza, the meat was from the UK which I was happy with. The food was not Scottish, however it was made local...Nothing stood out from Scotland sadly, there is a lack of Scottish foods."  
English Shopper*

When made aware, provenance can have positive associations of quality and trust. Signposting this to shoppers can therefore increase credibility

"Sometimes they aren't always available in all stores or online"

"Being able to find Scottish produce in the supermarkets and shops in my area stops me buying Scottish as its not available"



*"The packaging tells me that it is Scottish Salmon which always conjures up romantic images of salmon skinning Highland Lochs. The Scottish flag authenticating that it is produce of Scotland. It does give me extra reassurance and I will look for this more in future now that I am aware of it. It gives me a greater sense of trust."  
English Shopper*

## Although flags on packaging are a clear indicator of provenance...

Shoppers need signposting to these products before having to interrogate packaging

This is especially the case in smaller, convenience style stores where shoppers are often disappointed by the range of Scottish food & drink available



*"Maybe supermarkets could look to have a regional section that could change and they could make a focus on it. A bit like Aldi do with certain weeks focused on a certain country. This may draw people in to try different types of product"*  
English Shopper

*"I do like the Co-op but was very aware there was no obvious promotion or advertising of Scottish produce. Those items I found were quite subtle in their information. On my first shopping trip on Tuesday I went to Aldi and there was so much emphasis on British and Scottish produce, they showcase it in the signage within the shop"*  
Scottish Shopper

# 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.- Red Tractor Assurance

*"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"*

# Spontaneously shoppers wanted more signposting to Scottish food & drink

Promos are also a great way to grab attention

## Annual celebrations

- Emphasis on festivals and occasions, for example Burns Night
- Establishing it as a 'go to' for all UK nations will boost credibility
- Builds sense of excitement

*"I think they should have offers on particular country's foods to celebrate occasions"*

*"Big signs and posters clearly directing you to where the Scottish food section is located"*

## Products in-season

- Labelling what foods are in season and are grown locally/nationally
- Ability to support local farmers
- Tasting table in store with varying products depending on what's in season

*"More advertising boards to make us aware what is in season and what is in stock"*

*"Signage that encourages choices to "help you eat healthy""*

## Promos to grab attention

- Customers wanted to be made more aware of the promotions and deals on offer
- Advertising local produce as cheaper
- Giving shoppers the option to buying produce on offer

*"Perhaps put things on promotion at the end of an aisle and highlight them"*

*"Most supermarkets have a free promotional magazine, maybe a cover article in there"*

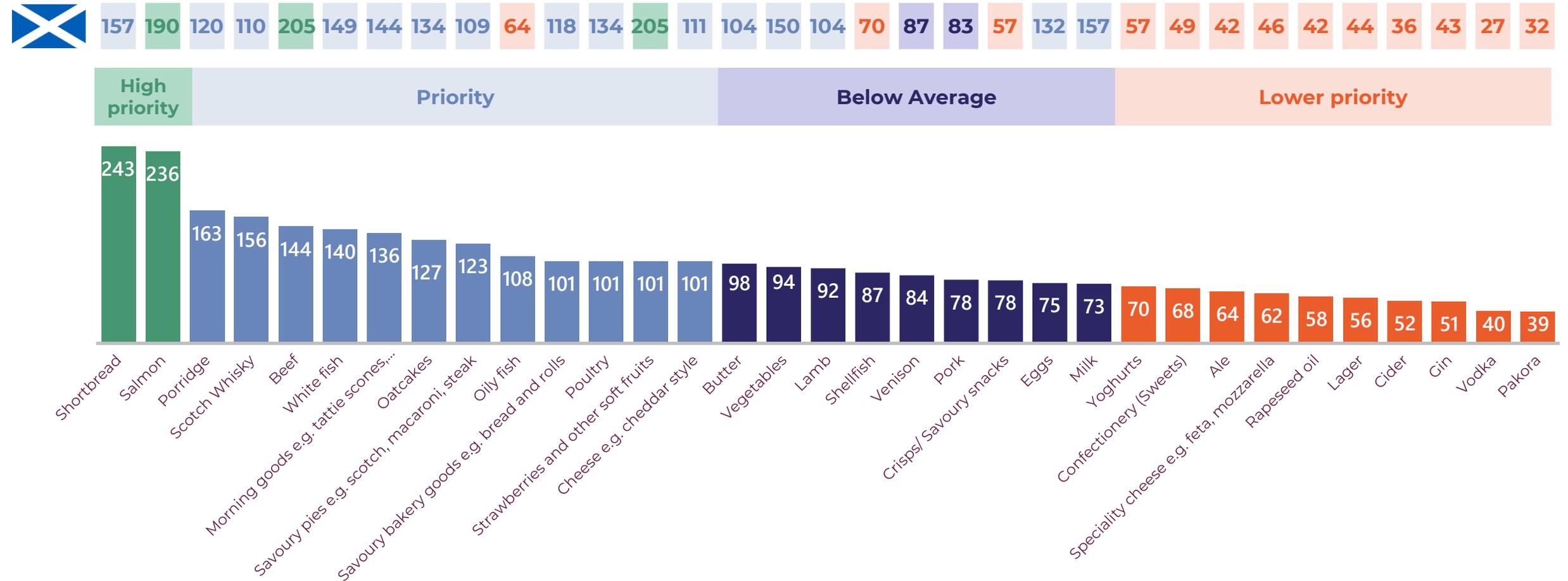
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# AT A PRODUCT LEVEL, HOW DO WE MAXIMISE UPTAKE INSTORE?



# Products more readily associated with Scotland are the most likely to drive footfall

Max Diff Trade-off exercise: Most likely food and drink to buy if produced in 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**

### Other

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

# 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

# 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



### 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

# 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?

# 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

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**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

# Scottish food and drink can help drive shoppers to store

Retailers must leverage it in a way that supports their brand positioning

LIKELY TO PAY MORE  
FOR SCOTTISH FOOD &  
DRINK



## All the brands in one place

ASDA

Morrisons  
Since 1959

TESCO

Sainsbury's

**Action:** Ensure the best Scottish food & drink brands have a home – sign posting new and surprising products

## Seasonal quality

ALDI

LIDL

**Action:** Showcase Scottish food & drink on pack e.g. through flags

## Best of British

M&S

EST. 1884

WAITROSE  
& PARTNERS

**Action:** Showcase Scottish specialists to build positioning as showcasing the best of British

## Buying local

SPAR

co op

Scotmid  
coop

M<sup>c</sup>Coll's

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