



What's eating Scotland?

Emerging trends in consumer attitudes to food

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Food Standards Scotland's 'Food in Scotland' Consumer Tracking Survey is a monitor of Scotland's...

...knowledge, attitudes and behaviours in relation to food

The survey is undertaken biannually and comprises a set of consistent questions with two alternating topics: **food safety and authenticity** and **diet and nutrition**.

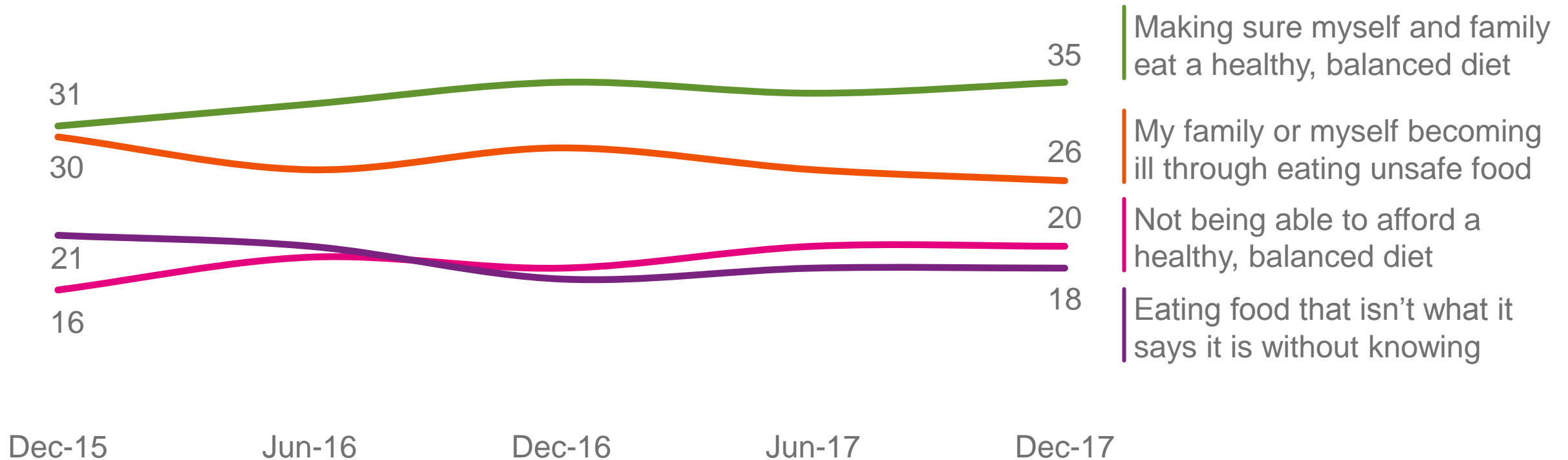
The survey is conducted online, with a representative sample of c.1,000 adults aged 16+ interviewed at each wave.

Five waves have been conducted to date, beginning in December 2015.



Consumers are consistently most concerned about ensuring they have a healthy diet, with this and affordability becoming more of a concern

% **Most** concerned with each issue (from a prompted list)



People's concerns, particularly in relation to food prices, are being amplified by the potential consequences of Brexit

Impact of Brexit on...



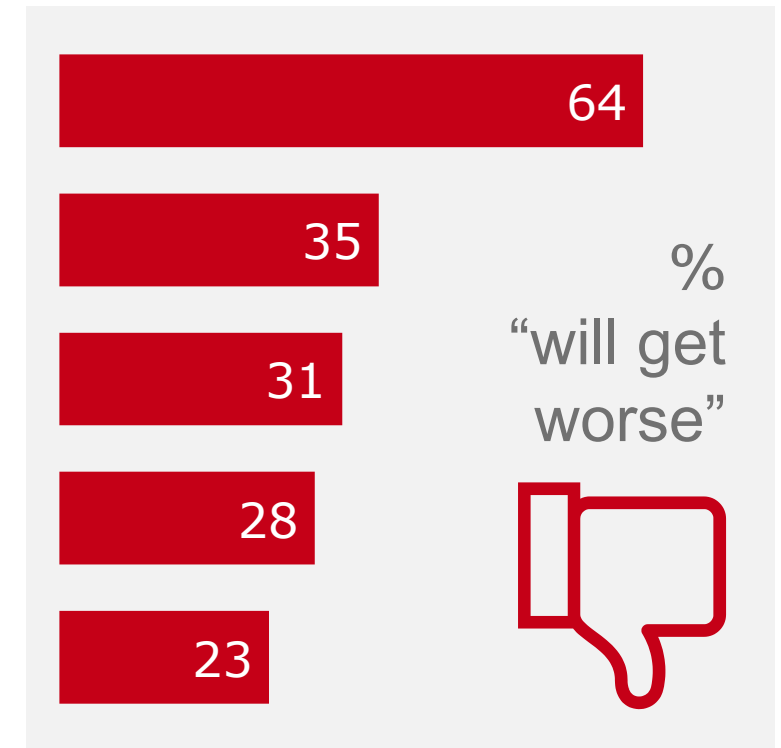
Price of food

Food availability

Food fraud
(not being what it says it is on the label)

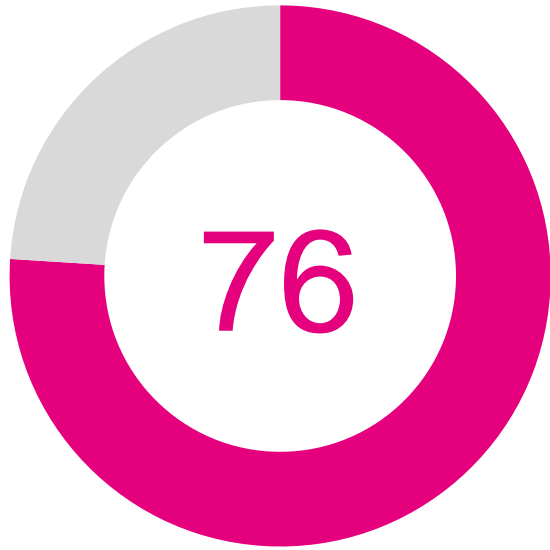
Food being sustainable/
environmentally friendly

Food safety

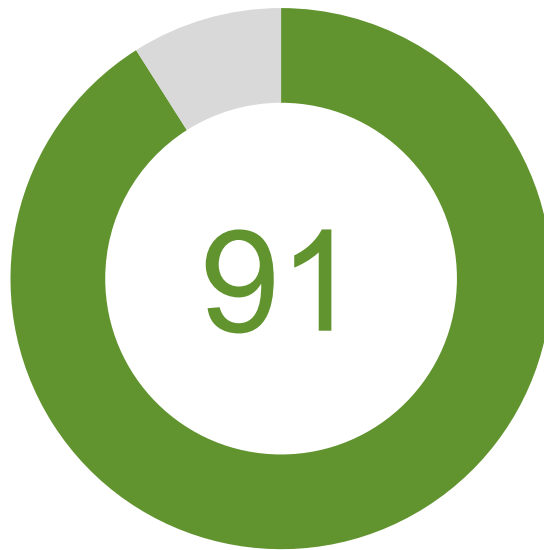


There is widespread recognition that Scotland has a poor diet and that change is needed

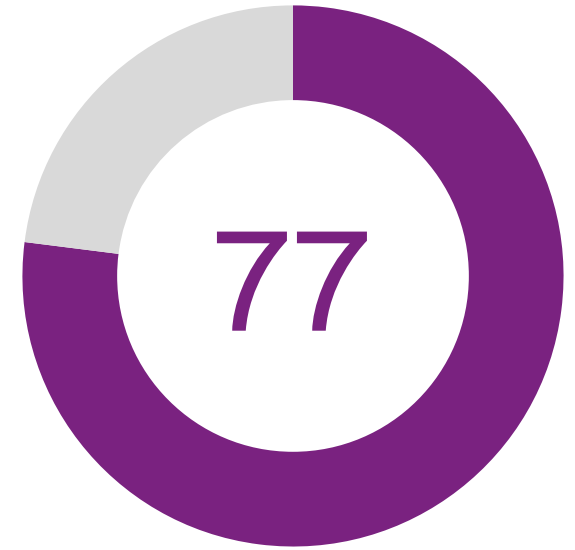
% Agree that



“ *There are too many people who eat unhealthily in Scotland*

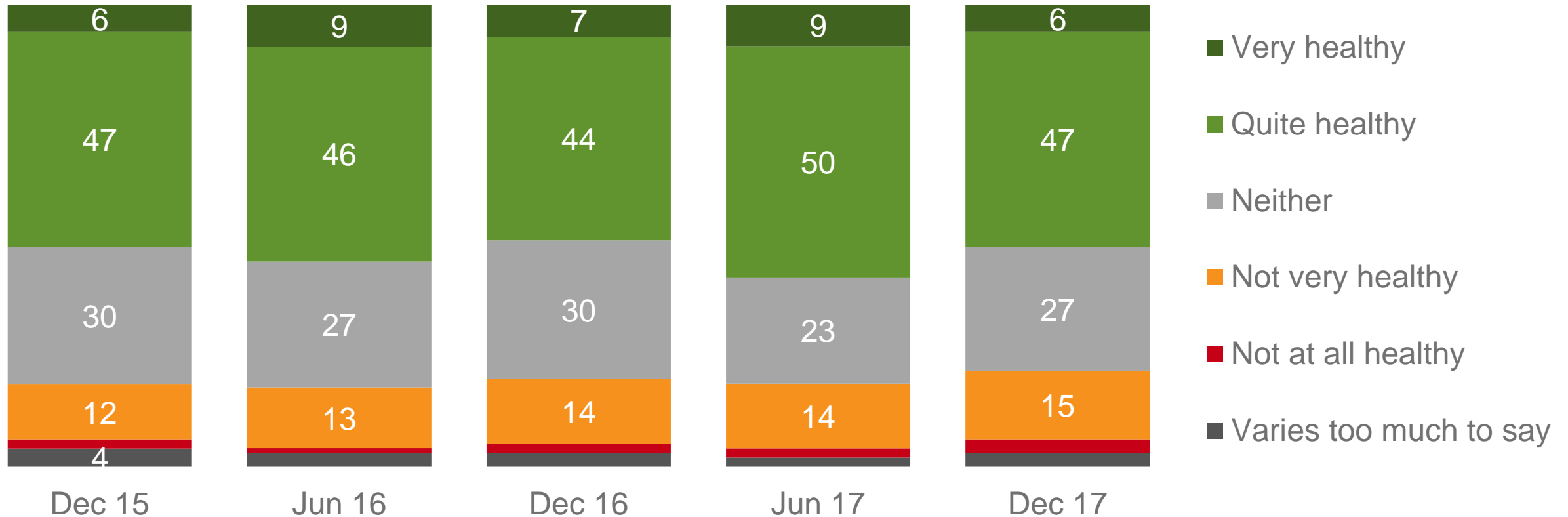


“ *Obesity is a serious problem in Scotland today*



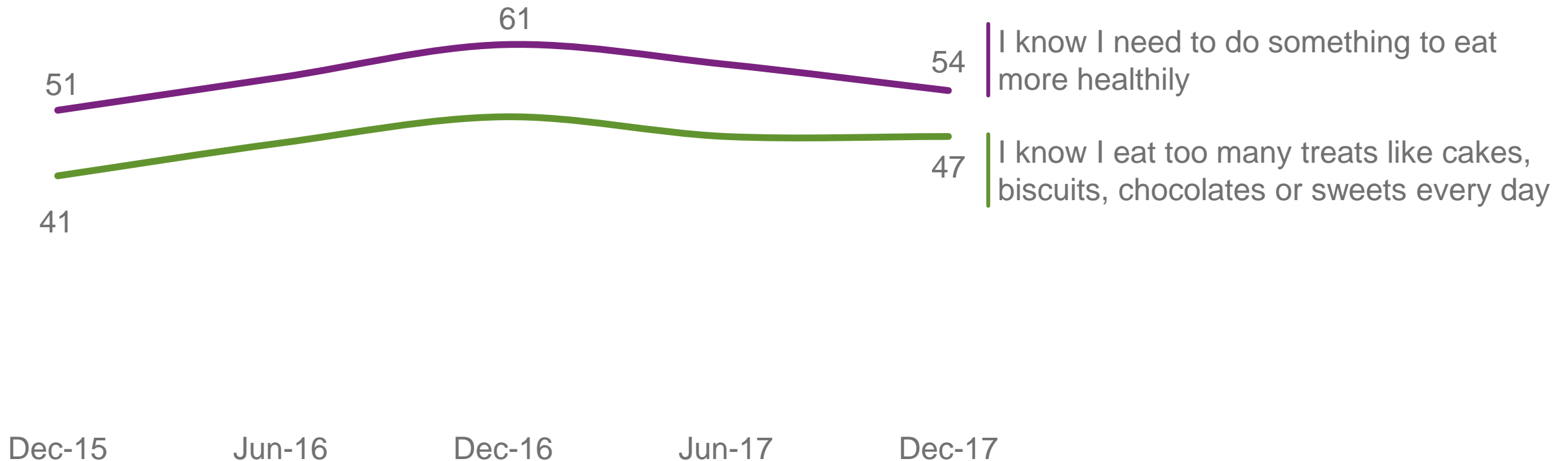
“ *I know that in Scotland, we have to make some significant changes to what we eat to be more healthy*

However, when asked about their own diet, only one in seven say what they consume is 'unhealthy', with the majority believing they are 'healthy'



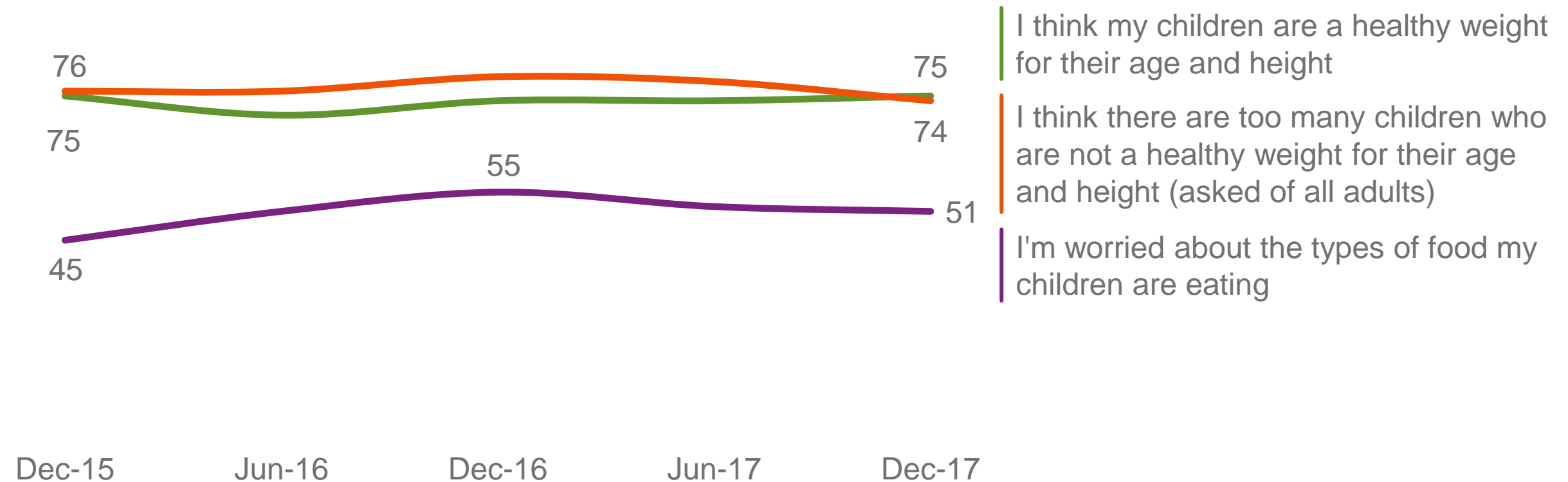
A good proportion nonetheless recognise they consume too many 'treats' and need to make some changes

% Agree that



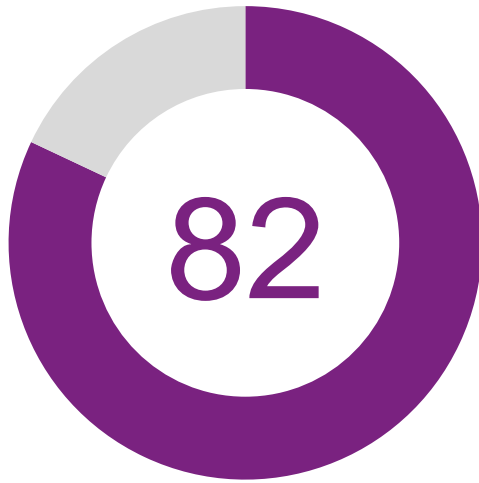
Similarly, whilst there is widespread concern about obesity in children, the majority of parents believe their own children have a healthy diet

% Agree that



The negative impact of unhealthy food choices on health is generally very well understood

% Agree that



“ I know that an unhealthy diet can cause lots of health problems like cancer and heart disease



This knowledge does not necessarily translate into action, with large numbers drinking soft and alcoholic drinks in spite of their calorie content



83% agree

I should avoid sugary drinks such as colas or lemonade



63% agree

I should only have fruit juice in small amounts



87% agree

Alcoholic drinks can be high in calories

but...

69%

Drink sugary drinks in an average week

59%

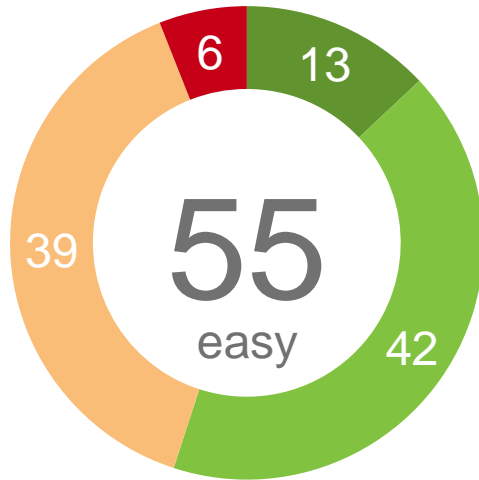
Drink sugary drinks once a day or more

41%

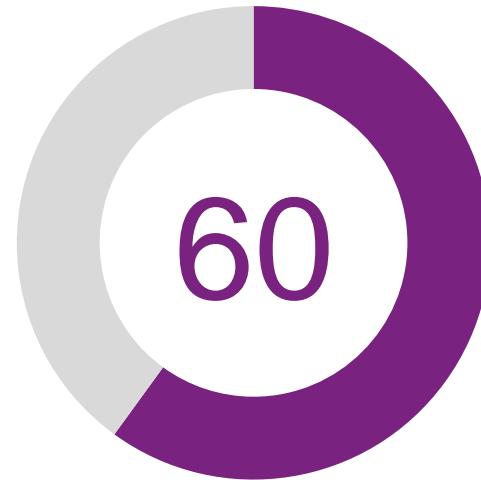
never think of calories when drinking alcohol

When it comes to eating out, many feel the choices available to them make it difficult to eat healthily, particularly when needing convenience

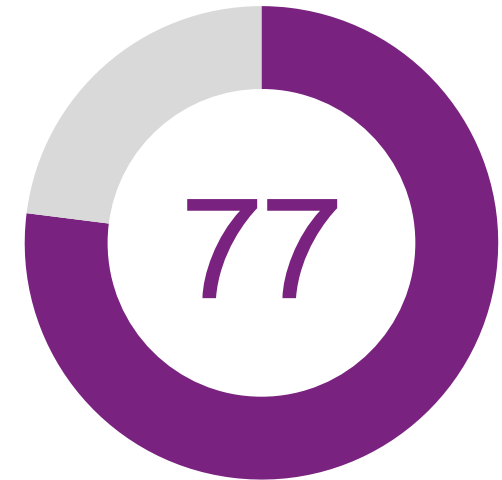
%



“ How easy or difficult is it for you to eat healthily outside the home?



“ Agree that: There are not enough healthy choices when eating out



“ Agree that: The type of food that is the most convenient to buy outside the home is usually the least healthy

Given this, there is support for action to be taken by food establishments to reduce portion sizes and provide calorie information

% Agree that



82%

Everyone (children and adults) should be able to select smaller portion sizes of items on a menu



42%

Portions when eating out of the home are too big



52%

Portion sizes of drinks and snacks in cinemas should be reduced

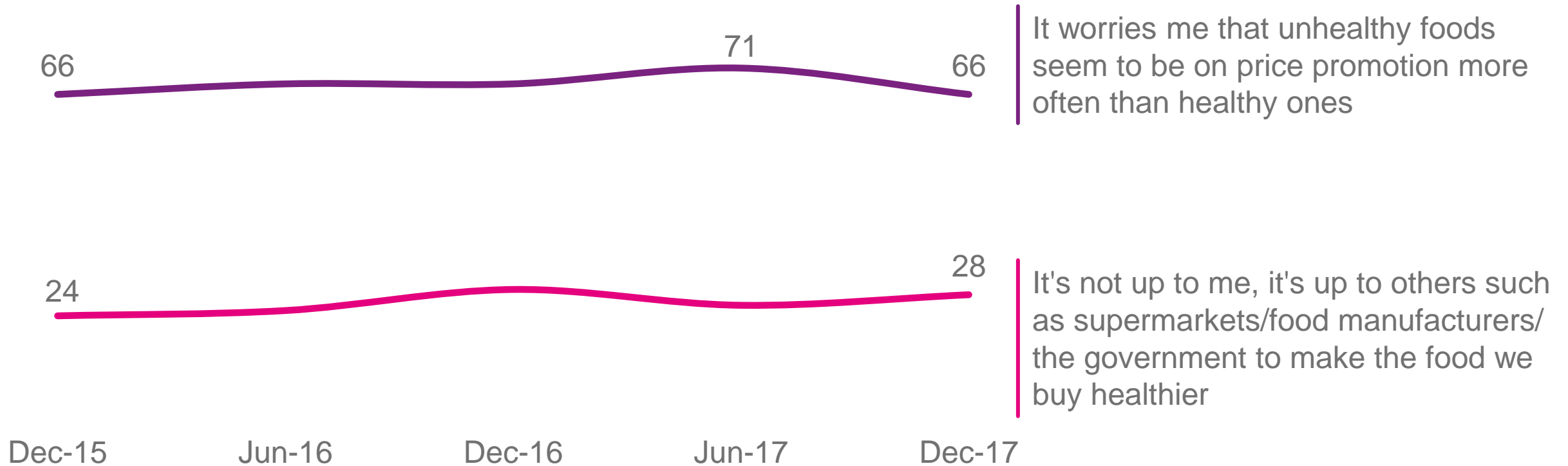


66%

Cafés and restaurants should display calories on menus

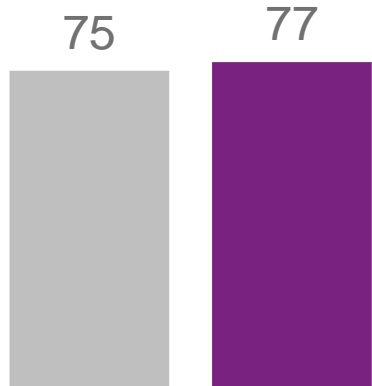
With an increase in the onus being placed on the food industry to improve diet, recent evidence suggests a perception that action is being taken

% Agree that

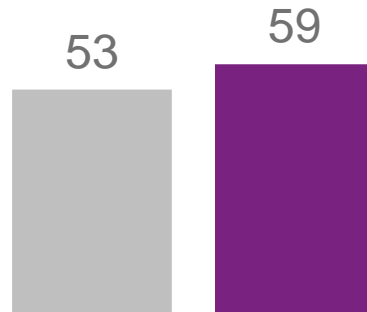


There is increasing support for both regulation and taxation of unhealthy foods, though consumers are more likely to favour the former

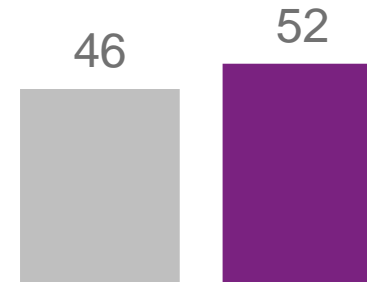
% in favour of the Government limiting the amount of sugar, fat or salt that is added to manufactured food



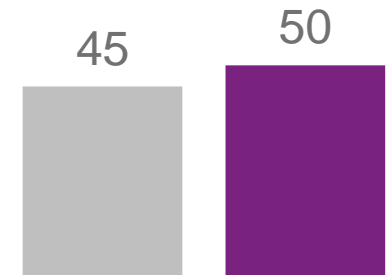
% in favour of taxing **sugary drinks**



% in favour of taxing other **high sugar foods** such as chocolate bars, sweets, breakfast cereals, biscuits and cakes

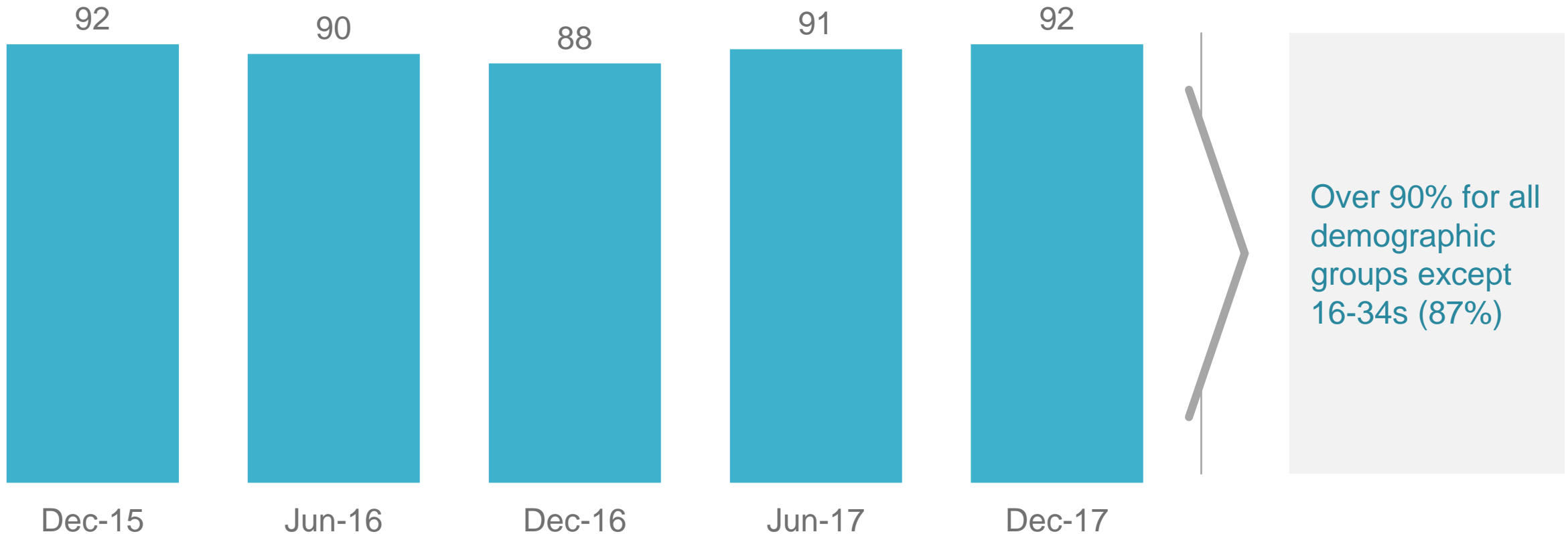


% in favour of taxing **high fat foods** like crisps and chocolate

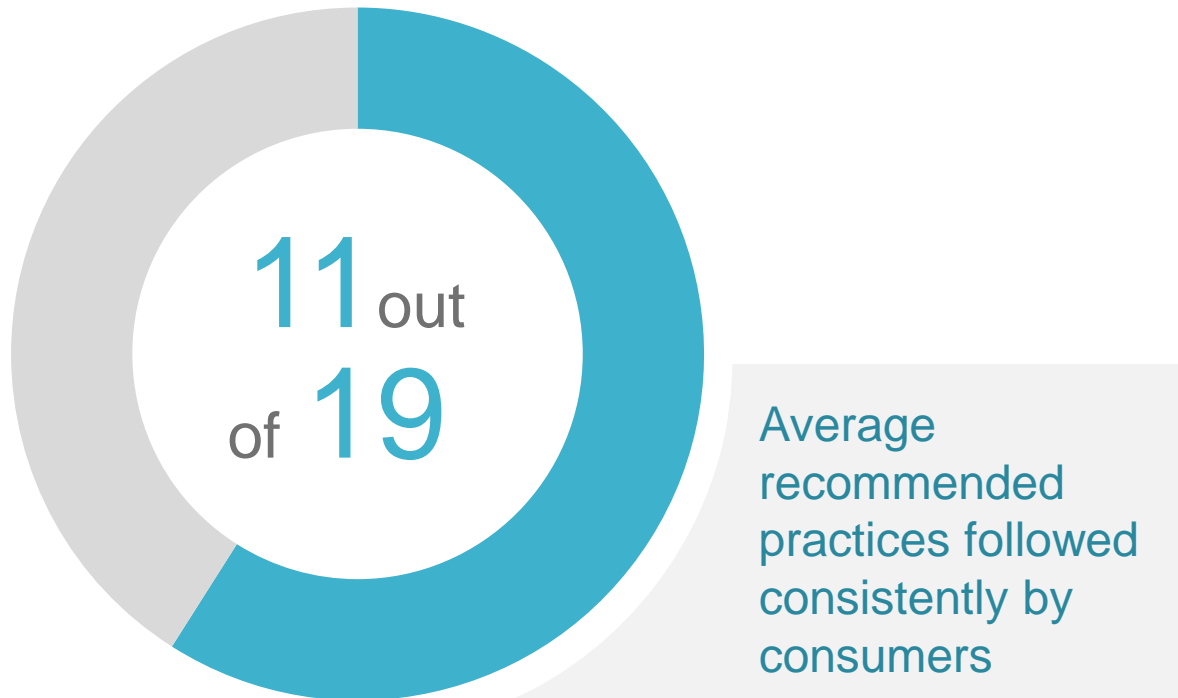


■ Jun-16 ■ Jun-17

Virtually all consumers feel they have clear information on how to prepare and cook food safely, but as with diet, this does not necessarily translate into action



On average, consumers follow just over half of the recommended practices monitored in the survey



NB: Calculated as a proportion of those with any responsibility for preparing and cooking food.

Examples of the levels following recommended practice include:



76% **Always** wash hands after handling raw meat, poultry or fish



62% Store raw meat or poultry on the bottom shelf of fridge



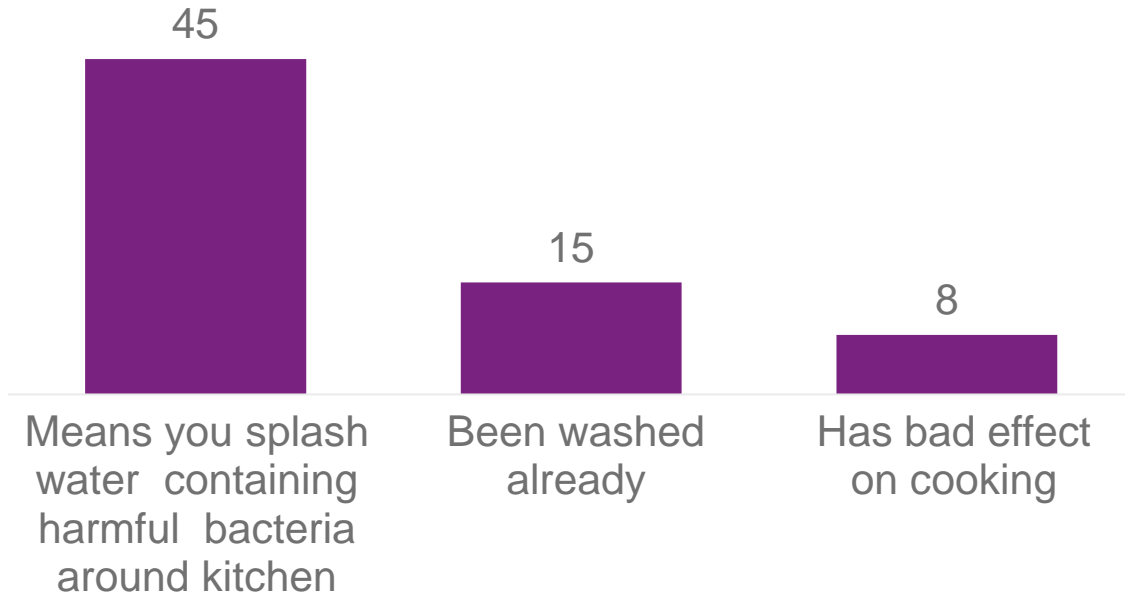
46% **Never** wash raw chicken/poultry

There is good recognition of the danger of splashing bacteria when washing chicken, but old habits die hard with many still washing

Should not wash raw poultry **58%**

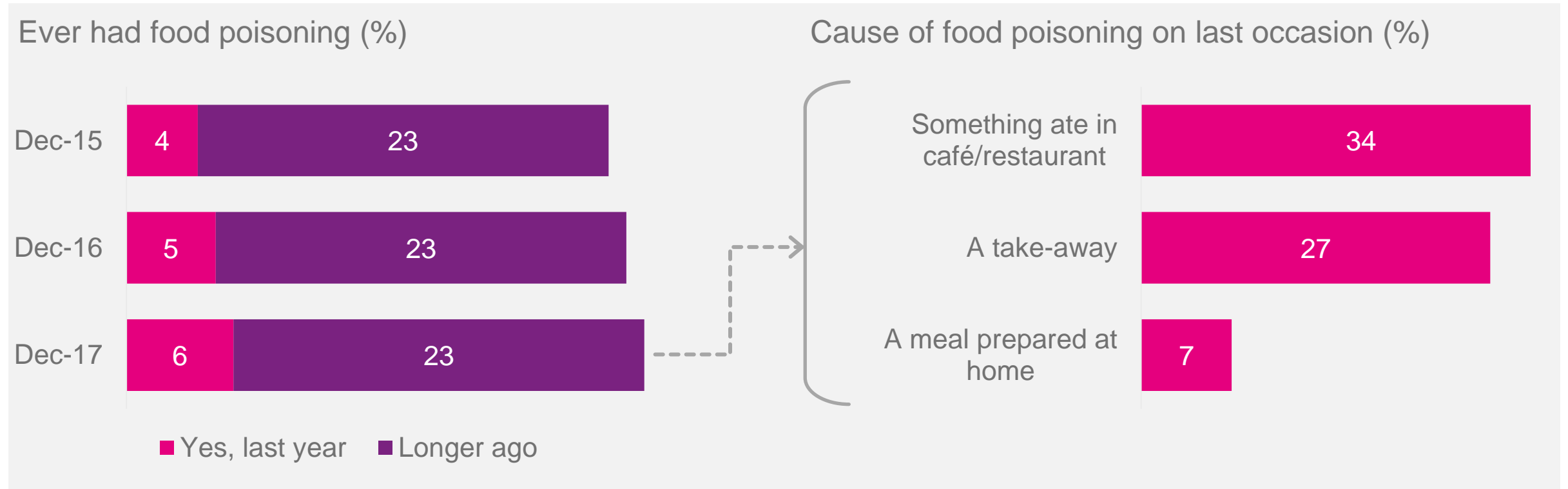
Should wash raw poultry **41%**

Significantly higher among 16-24s (47%) and 65+ (49%) vs. 35-44s (30%)



Among the increasing number who claim to have experienced food poisoning...

...there is a widespread assumption that it is from the out of home environment, with fewer than one in ten acknowledging they could be personally to blame



Consumer attitudes clearly show a lack of understanding of the likelihood and seriousness of food poisoning in the home

% Agree that



19%

No one gets very ill from food prepared in their own kitchen



31%

There are serious health risks to young children and elderly from food prepared at home



83%

There are lots of easy things to do in the kitchen to reduce risk of food poisoning



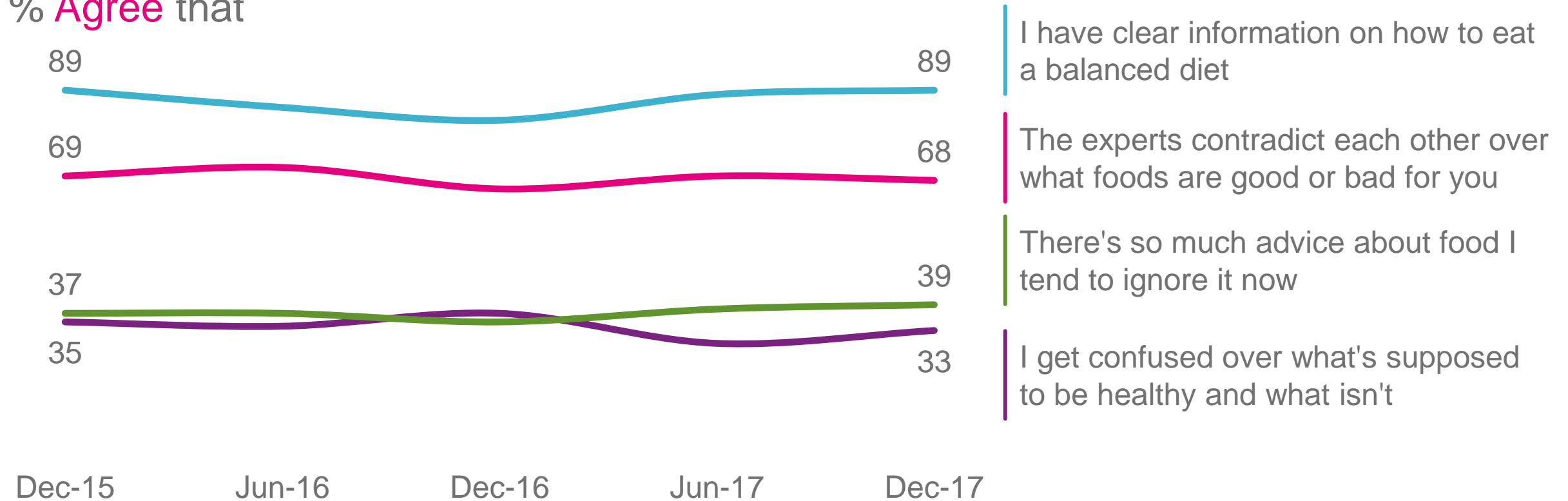
28%

I use the 5 second rule sometimes as a way of deciding if something is safe to eat/cook



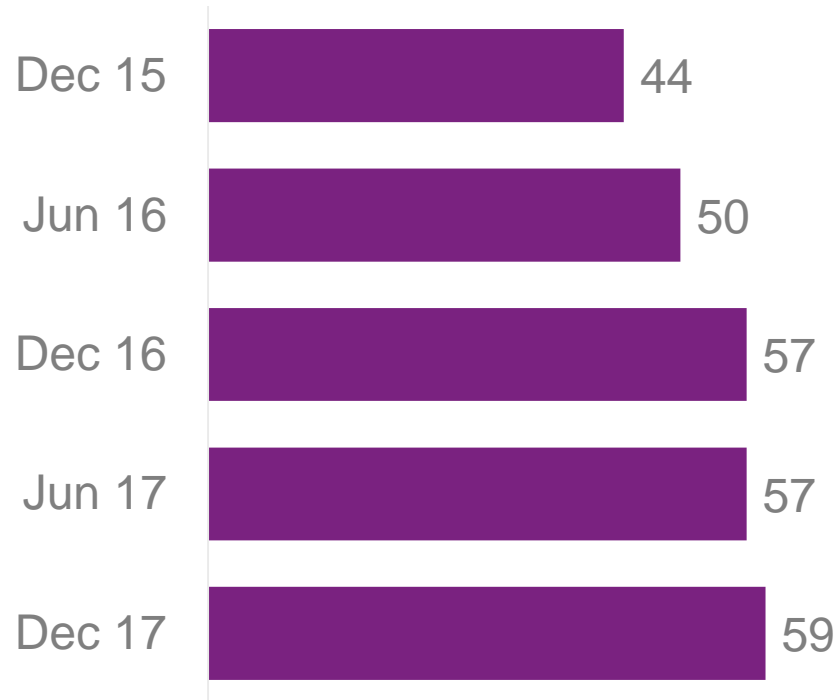
The public has conflicting opinions of expert advice – though most claim to have clear information, some are confused and potentially ignore it

% Agree that



FSS' work to date has led to significant increases in awareness and trust in the organisation, giving it a licence to be an expert voice for consumers

% **Awareness** of FSS



% **Trust** in/trust a lot FSS (among those aware of FSS)



In summary...



Consumers are most concerned about having a healthy diet, but affordability is increasingly of concern and amplified by Brexit concerns. Authenticity is (currently) less of a concern.



There is recognition that Scotland's diet should change. Many acknowledge personal responsibility for diet, but deflection about one's own eating acts as a barrier.



The negative impact of unhealthy foods is very well understood, but is not reflected in claimed behaviour and consumption.



There are several perceived barriers to being healthy when eating out, but there is support for changes to make this easier.



There is an increasing expectation that the food industry takes action to make food healthier, and if not there is support for taxation and regulation to enforce this.



Though consumers believe they are preparing and cooking food safely, there is room for improvement in following a number of recommended practices.

Thank you

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