Food Standards Scotland

Consumer Attitudes Towards the Diet and Food Environment in Scotland

Research Findings

April 2023

CONTENTS

LIST OF TABLES & CHARTS

1. EXECUTIVE SUMMARY

Food Standards Scotland (FSS) identified a need for research to obtain up-to-date evidence on attitudes about diet, health and the food environment from people living across Scotland, to inform policy and consumer messaging around healthy eating.

Three key topic areas were identified as being of interest:

- Affordability of food and the impact of the cost of living situation
- Eating out of home and the use of digital technology (e.g. food apps)
- The extent to which environmental sustainability is a priority for consumers; how informed they feel about sustainability; and making sustainable choices when purchasing food

JRS, an independent research consortium, designed a robust methodology, conducting an online survey with a representative sample of 1,514 adults aged 16+ in Scotland, and a boost sample of 250 parents with children aged under 16yrs living at home. The survey yielded a significant volume of data on each of the key topic areas, on which detailed analysis was undertaken. Research was undertaken in accordance with the Market Research Society Code of Conduct.

Cost of Living

The vast majority of households in Scotland have been significantly impacted by the cost of living situation and there are high levels of concern about household finances both now and for the year ahead.

Numerous aspects of people's lives have been impacted and many have adapted their behaviour to minimise spend. Those in the lowest socio-economic groups have seen the greatest impacts and have limited capacity to do more to mitigate ongoing impacts.

The cost of living situation has also affected the food environment with consumers changing shopping, cooking and eating behaviours in order to save money.

While some say they are placing greater focus on eating a healthy diet as a result of the cost of living situation, more say this has become less of a focus and that their diet has become less healthy.

Food insecurity is an issue, with a significant minority worried about affording food in the next month, and almost a fifth skipping meals due to lack of money. This issue is disproportionately affecting those in younger age groups, people with children and those in the lowest socio-economic groups.

Eating Out of Home

Eating out of home, including eating in restaurants, buying food on the go and ordering takeaways or delivery food, is a regular occurrence for the public in Scotland.

While many have reduced frequency of eating out, ordering takeaway and delivery food has been made easier and more convenient through the use of apps and online ordering. And the widespread use of promotional alerts has contributed to consumers ordering more food than planned, more often than they otherwise would.

While many say it is not difficult to find healthy choices when eating out, it is more difficult with takeaways and delivery food than when eating out in a restaurant. And more than a quarter of adults in Scotland will just not choose a healthy option out of home.

Cheaper pricing and promotions for healthier foods are the main prompts to making healthier choices when eating out of home or ordering takeaway or delivery food. There is also significant support for food businesses to play a role in promoting and facilitating healthy eating, with consumers particularly keen to see smaller portion sizes being offered and healthier children's menus. A majority also support calorie labelling across all foods being bought out of home, with significant support for full nutritional labelling as well.

Calorie labelling is being noticed on menus and is having an impact on the choices made by consumers, with many reporting that calorie labelling made them think more about their food choices or choose a lower calorie option.

Sustainability

While a majority of consumers say sustainability and ethical sourcing of foods is important to them, in the context of other decision making criteria, such as cost, taste, healthy food and finding something the whole family will eat, concerns around sustainability are much lower priorities.

Consumers regularly practice a range of sustainable behaviours, predominantly drinking tap water, reducing and recycling food waste and buying fruit and vegetables in season. Fewer are committed to reducing meat and/or dairy consumption for environmental reasons.

Most feel relatively well informed about how to make sustainable food choices in retail environments, but much less well informed when purchasing food from restaurants, cafes and takeaways.

Lower costs and more promotions are considered the key routes to encouraging more sustainable choices in food purchasing, reflective of the challenges around cost of living.

2. INTRODUCTION

2.1 Research Background

Food Standards Scotland plays an important role in driving and influencing policy aimed at improving Scotland's diet, helping to reduce health inequalities and the burden of diet related disease.

FSS has previously proposed a suite of measures to improve the Scottish diet, a number of which were incorporated into The Scottish Government's Healthier Futures Delivery Plan, including actions to transform the Out of Home (OOH) food environment.

FSS monitor consumer attitudes, knowledge and reported behaviours relating to food in a representative sample of Scotland's population in regular tracking surveys. In addition, consumer surveys were carried out during the COVID-19 pandemic, and are currently being undertaken in our latest Cost of Living Pulse Survey. However, FSS last carried out a survey which specifically explored attitudes towards diet and nutrition among a representative sample of consumers in Scotland, in 2015.

FSS identified a need for research to obtain up-to-date evidence on attitudes about diet, health and the food environment among a representative sample of people living across Scotland.

This work will be used to inform:

- policy to improve the diet and food environment in Scotland;
- the progression of forthcoming public health nutrition policy areas, including affordability and environmental sustainability; and
- FSS approaches to consumer messaging around healthy eating.

Independent research consortium, JRS, was commissioned by FSS to undertake this consumer research. Three key topic areas were identified as being of interest:

- Affordability of food and the impact of the cost of living situation
- Eating out of home and the use of technology
- The extent to which environmental sustainability is a priority for consumers; how informed they feel about sustainability; and making sustainable choices when purchasing food

Given the need for robust analysis by key subgroups of interest, JRS recommended a quantitative online survey methodology, with a large nationally representative sample.

3. METHODOLOGY & SAMPLE

JRS recommended conducting a large-scale online survey amongst a representative sample of 1500 adults, aged 16+ in Scotland, with an additional boost sample of 250 parents with children aged under 16 living at home. Delivering a robust quantitative approach allowed for detailed subgroup analysis to be undertaken with confidence.

A staged approach was taken to the design, implementation and analysis of the survey.

3.1 Survey Design

The first step in designing the survey was a full review of current and previous FSS surveys, looking for instances where the three key topics of interest had previously been included in research. This allowed identification of questions which did not need to be included in the new survey, as recent data already existed; and identification of questions where it would be useful to replicate wording and/or answer codes in order to facilitate comparability with other datasets.

A questionnaire workshop was then held with FSS Public Health Nutrition team to capture all relevant question areas for inclusion in the survey. JRS used the output from both of these stages to draft a questionnaire, which was approved by FSS.

Prior to launching the survey, a cognitive testing exercise was undertaken. Cognitive interviewing is a widely used pre-testing tool, in which respondents are asked to report directly on the internal cognitive processes employed to answer survey questions. Interviewers probe the meaning of specific terms or the intent of specific questions throughout the interview. A small number of purposively chosen respondents are interviewed and the results are used for the specific purpose of refining questionnaire design.

A total of 10 cognitive interviews were undertaken with a broad sample of adults in Scotland:

- 4 x males; 6 x females
- 3 x pre family; 4 x parents with children at home; 3 x post family
- 2 x AB; 4 x C1C2; 4 x DE
- Min. 2 from minority ethnic backgrounds
- Mix of urban, suburban, semi-rural and rural areas across Scotland

Interviews were conducted online using Zoom and lasted approximately 45 minutes. Participants were asked to complete the survey while explaining their thought process aloud. Interviewers probed in three core areas as follows:

1. CLARITY

- Is the question clear? Do you understand what it is asking?
- Are the answer codes clear? Do you understand them?
- Are any words confusing? What?
- Is there a better way of asking this question? Or phrasing the answer codes?

2. RELEVANCE

- Does the question feel relevant to you / your life?
- Can you find an answer relevant for you? IF NO: what's missing? What answer would you like to be able to give?

3. BIAS

- Is the question asked in a balanced way? Do you feel it's leading you to give a specific 'right' answer?

- Do you feel happy to give a truthful answer?

Detailed notes were made on each question, and while in the main feedback was positive, several changes were made to question wording to enable greater and consistent levels of comprehension in the final questionnaire.

3.2 Mode of data collection

Data was collected using an online panel survey. This is an online group of recruited people willing to conduct social and market research surveys in return for a small financial incentive for each survey completed. A 'panel blend' approach was taken to fieldwork. This involves blending the sample across a number of research panels to increase the potential overall sample size, help ensure good coverage across key demographic groups, and to reduce the risk of panel biases that can sometimes occur by relying solely on a single panel provider. The panels used for this project were:

- Panelbase
- Dynata
- Kantar

The survey was created using Snap Surveys software, a bespoke survey software. Survey programming used different question types and layouts to enhance the user experience and optimised the survey for completion on different devices.

The survey took approximately 20 minutes to complete.

3.3 Sampling and fieldwork

Fieldwork took place between 9th and 23rd January 2023, with a 'soft launch' conducted across all panel providers on the first day of fieldwork to ensure responses were being correctly recorded and to check the survey logic and routing was working as intended.

The target sample was 1,500 adults aged 16 years or older, representative of the demographic composition of adults in Scotland. Quotas were set on age, gender, region and ethnicity to help return a representative sample. A boost sample of 250 parents with children aged under 16 years was also targeted, in order to ensure a sufficiently large sample for analysis, of parents across socio-demographic groups.

A final sample size of 1,764 respondents was achieved:

- 1,514 nationally representative sample of adults aged 16 years or older
- 250 boost sample of parents of children aged under 16 years.

3.4 Data processing and analysis

Data was checked to ensure all responses were valid and JRS' standard data quality checks were undertaken. Due to the way the survey was programmed, ensuring questions could not be skipped and routing was incorporated, no additional logic or cleaning checks were required.

Responses from questions with an 'other – specify' option were analysed and, if appropriate, back-coded into one of the pre-coded categories.

Data was weighted on gender, age and socio-economic group to ensure the final dataset was representative of the adult population in Scotland. As outlined previously, the survey design included a boost sample of parents, and weighting was also applied to incorporate this data into the overall sample, in the correct proportion.

Detailed data tables were produced to enable analysis and reporting of the data. Statistical significance testing, at the 95% confidence limit, was included in the data tables to help with analysis. While use of statistical testing is not strictly accurate when working with a quota sample, it is widely used across the research industry to guide analysis and should be treated as indicative rather than definitive.

Throughout the report reference will be made to analysis which is statistically significant, as well as other findings which are not. Where data is quoted for sub samples this is the proportion of the sub sample who gave a specific answer. For example the proportion of all males who say their diet is 'very' healthy would be shown as males (10%).

Where mean scores are shown, unless otherwise specified these are calculated with 5 being the highest score (e.g. very important; very easy; very healthy) and 1 being the lowest score (e.g. not at all important; very difficult; not at all healthy).

3.5 Sample Profile

The final, weighted, profile of the sample is shown in table 1 below.

Table 1: Demographics

Gender:		**Number of adults in the household:**	
Male	48%	1	29%
Female	52%	2	51%
		3+	20%
Age:			
16-24	12%	**Kids in the household:**	
25-34	16%	Yes	28%
35-44	17%	No	72%
45-54	18%		
55-64	16%	**Health issues:**	
65-74	11%	Yes	29%
75+	10%	No	69%
		Prefer not to answer	2%
Socio-Economic Group*:			
AB	19%	**Working status:**	
C1	32%	Working	56%
C2	22%	Not working	44%
DE	28%		
Ethnicity:		**Area:**	
White	92%	Central Scotland	15%

Mixed or Multiple Ethnic Groups	2%	Glasgow	17%
Asian, Asian Scottish or Asian British	3%	Highlands and Islands	5%
African	1%	Lothian	18%
Other ethnic group	1%	Mid Scotland and Fife	9%
Prefer not to answer	1%	North East Scotland	18%
		South of Scotland	5%
		West of Scotland	13%

*Socio-economic group is a classification system based on occupation, that is widely used in market and social research. The classification is based on the occupation of the person who earns most within the household.

A short descriptor of each socio-economic group is shown below:

A	Higher managerial, professional or administrative
B	Intermediate managerial, professional or administrative
C1	Supervisory or clerical, junior managerial, professional or administrator, student living away from home
C2	Skilled manual worker
D	Semi or unskilled manual worker
E	Unemployed or retired and living on state pension only

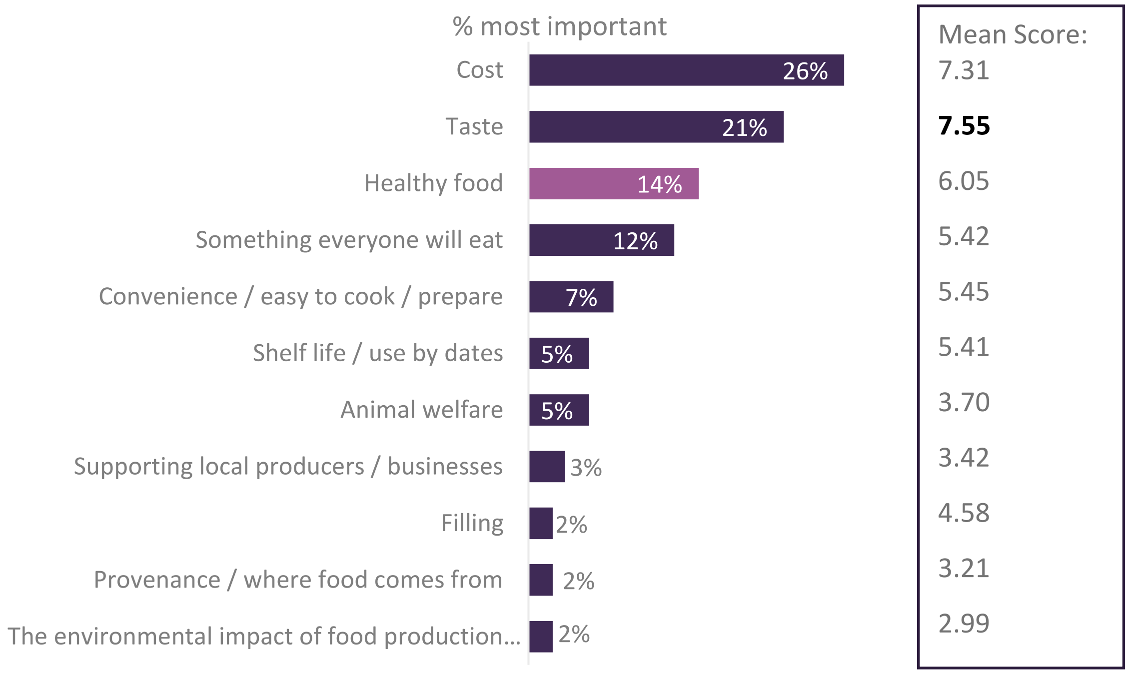
4. CONTEXT

While the main focus of the research was on the three key topics of: cost of living, eating out of home and sustainability, several questions were asked to set the context around diet and nutrition for consumers in Scotland.

4.1 Important Factors When Buying and Preparing Food

Firstly, it was important to establish how consumers prioritise factors when making decisions about what to buy and cook for their households. Respondents were given a list of 11 different potential considerations and asked to rank these from most to least important in their thought process. Data in Figure 1 shows both the proportion of respondents who selected each aspect as their most important consideration, and the mean score for each. The mean score is the average score (out of 11).

Figure 1: When thinking about buying and preparing food for your household, which of the following are most important to you? Base: (All) 1764 Rank from most to least important. 11= most important / 1=least important



Cost and taste were the primary considerations identified by respondents when buying and preparing food for their households with more than a fifth citing these as the most important factor.

Looking at the mean scores, while data is reasonably consistent, it is clear that overall healthy food, convenience, finding something everyone will eat and shelf life / use by dates are also important to consumers.

In contrast, supporting local producers, provenance / where food comes from and environmental factors are low on the priority list for most consumers.

Some differences exist across demographic groups when looking at key priorities:

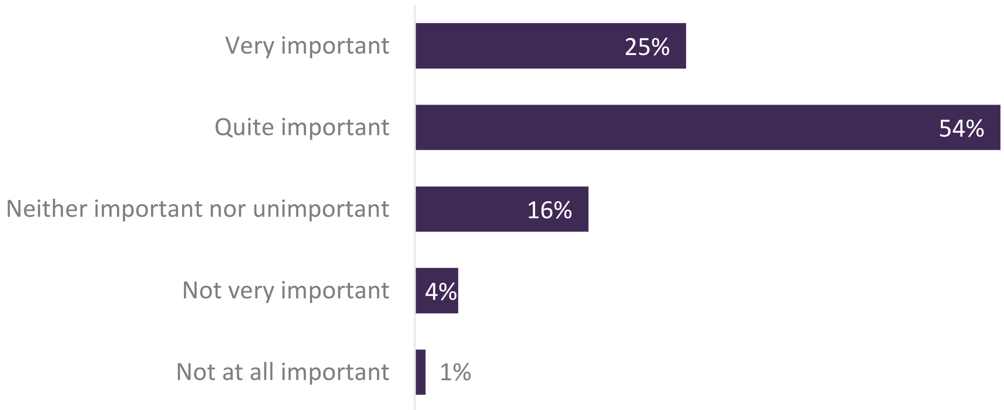
- Cost was particularly important for those worried about affording food in the next month – a third of whom said this was their most important consideration

- Finding something that everyone will eat is a priority for those with children at home, 19% citing this as the most important factor
- Those in older age groups were more likely than others to say healthy food was their top priority (65-74 years 18%; 75+ years 21%). This was also true of people in AB socio-economic groups (19%).

4.2 Healthy Eating

As further context, respondents were asked to state the extent to which it is important to them to have a healthy diet, and then to rate how healthy their diet is.

Figure 2: How important is it to you personally to have a healthy diet? Base: (All) 1764

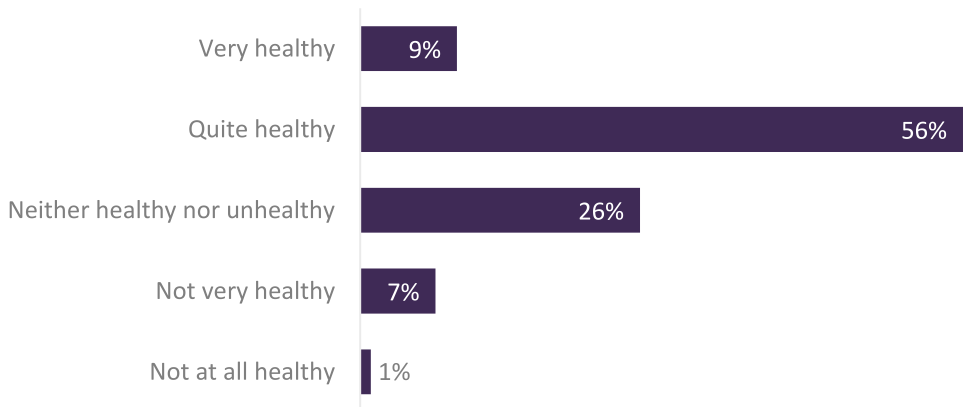


A quarter of respondents said it was 'very' important to them to have a healthy diet, and more than half said it was 'quite' important.

Women were significantly more likely than men to feel having a healthy diet was 'very' important (27% vs 22%). Those in AB socio-economic groups (34%) and people from ethnic minority backgrounds (42%) were also more likely than others to feel this was 'very' important.

While a quarter feel it is 'very' important to have a healthy diet, as can be seen in the chart below, just under 1 in 10 rate their own diet as 'very' healthy, with most instead saying they eat a 'quite' healthy diet.

Figure 3: Thinking about the kind of foods you personally eat and drink (both for meals and snacks), how healthy do you feel these are? Base: (All) 1764



Some subgroups were more likely than others to rate their diet 'very' healthy:

- Those eating a vegan diet (31%)

- Ethnic minorities (18%)
- 16-24 year olds (14%)
- Those with children at home (11%).

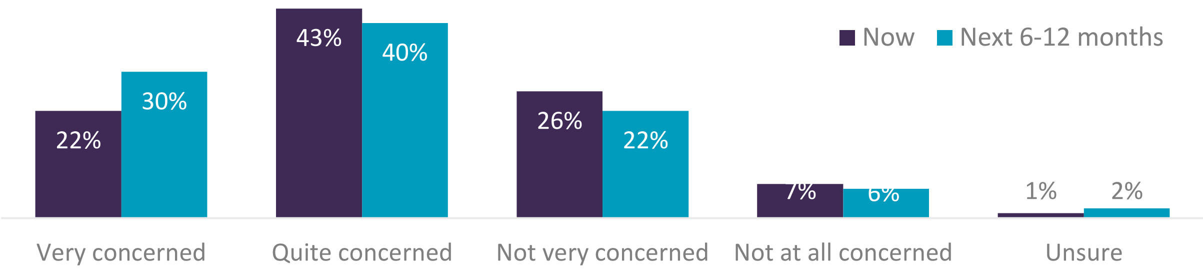
5. COST OF LIVING

The first of the key question areas covered in this survey is the cost of living situation. Other research undertaken by Food Standards Scotland[1] suggested that the current situation was having a significant impact on the food environment, warranting further investigation.

5.1 Cost of Living Impact on Household Finances

In order to understand the current financial situation and outlook for the year ahead, respondents were asked to record their concern about household finances now and in the next 6-12 months.

Figure 4: How concerned are you about your household finances now, and for the next 6-12 months? Base: (All) 1764



It is clear that high levels of concern exist about household finances amongst adults in Scotland, with almost two-thirds ‘very’ or ‘quite’ concerned now, and the number concerned increasing to 70% when looking at the year ahead. Very few said they were ‘not at all’ concerned about their own financial situation.

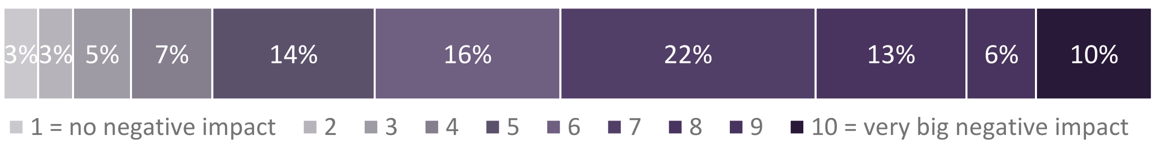
Almost a quarter stated they were ‘very’ concerned about their finances now, a view expressed more often by:

- Those in lower socio-economic groups - C2s (26%), DEs (31%)
- People from ethnic minority backgrounds (33%)
- Those with children at home (26%).

3 in 10 said they were ‘very’ concerned about household finances in the next 6-12 months, a view also more likely to be expressed by those in DE socio-economic groups (36%) and those with children (35%).

Linked to this, and to enable understanding of the specific impact of the cost of living situation on household finances, respondents were asked to rate, on a 10 point scale, how much of a negative impact cost of living was having. The results are shown in Figure 5.

Figure 5: How much of a negative impact, if any, is the cost of living situation having on your household finances? Base: (All) 1764



[1] Cost of Living pulse surveys September 2022 & January 2023 not yet published

This data highlights that the vast majority of households across Scotland have experienced a negative impact on their finances as a result of the cost of living situation – more than 8 in 10 giving a score of 5 or more on the scale.

Answers were grouped as follows, to aid analysis:

- 8-10 rating (29%)
- 5-7 rating (52%)
- 1-4 rating (18%)

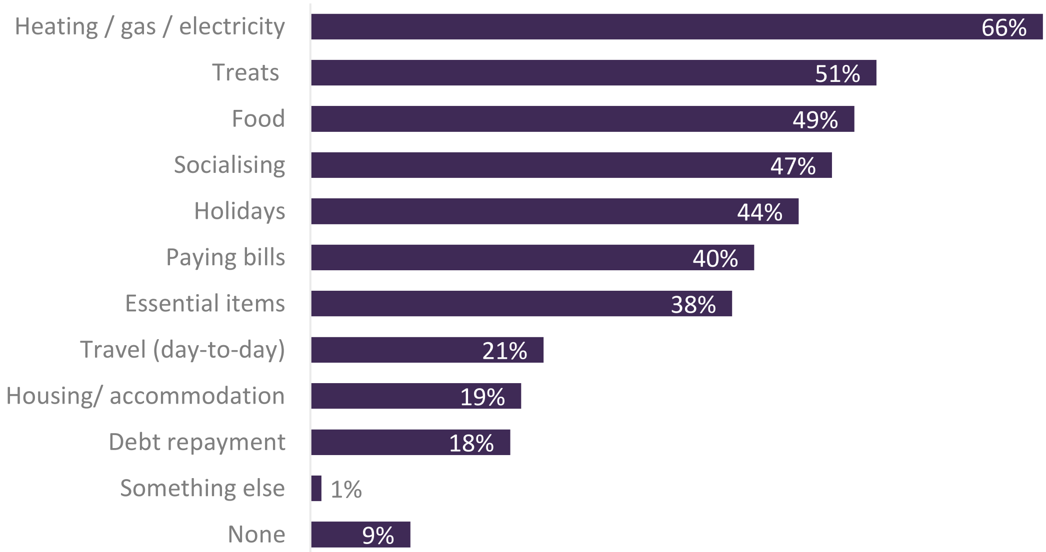
Almost two-fifths (38%) of people in the lowest socio-economic groups, DE gave scores of 8-10, with 15% stating they had experienced a very big impact (scoring 10 on the scale). Those with a long term illness or disability that significantly limits their day-to-day activities were also more likely to have seen a 'very' negative impact – 26% giving a score of 10 on the scale.

In contrast, a significant minority of those aged over 65 years old (35%) and people in the AB socio-economic groups (26%) gave 1-4 ratings, indicating no or limited impact on their household finances as a result of the cost of living situation.

In order to further understand the impacts of the cost of living situation, respondents were asked to outline the aspects of their lives that had been negatively affected. They were presented with a list of possible choices, with examples given to help clarify meaning for the following options:

- Essential items (e.g. petrol, toiletries, clothing)
- Socialising (e.g. eating / drinking out with friends or family)
- Treats (e.g. days out, impulse purchases, cinema, nails, beauty).

Figure 6: Which, if any, aspects of your life are being negatively affected by the cost of living situation? Base: (All) 1764



People across Scotland have experienced a wide range of negative impacts on their lives as a result of the cost of living situation. Home energy and heating is the area of greatest impact, with two-thirds citing this. Around half have also seen a negative impact on non-food treats, socialising and food. Around 4 in 10 have also noticed a negative effect on holidays, their ability to pay bills, or affording essential items like petrol, toiletries and clothing.

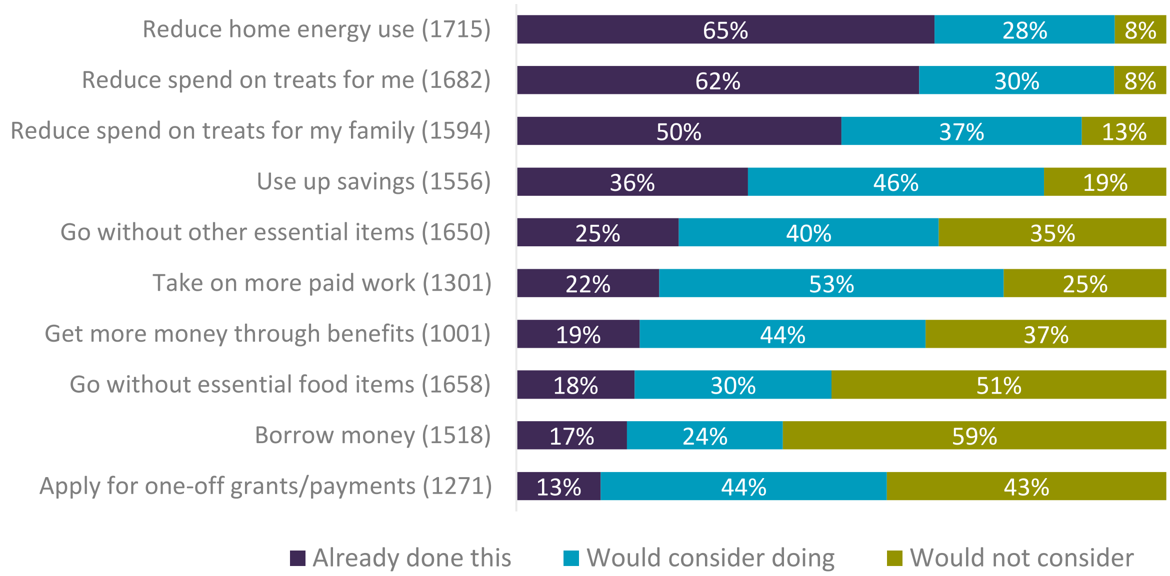
Just 1 in 10 said their lives had not been negatively impacted in any of these areas.

The situation has not had a consistent or equal impact across the population, rather causing difficulties for different types of people in different ways:

- Those in the lowest socio-economic groups (DE) were more likely than others to have experienced a negative impact on their heating/energy (76%), food (58%), essential items (46%) and their ability to pay bills (50%)
- People with disabilities or long term conditions that significantly affect their day-to-day activities were more likely than others to have experienced negative impacts in the following areas: heating / gas / electricity (77%), food (64%), paying bills (58%), essential items (56%), debt repayment (31%) and housing/ accommodation (25%)
    - There were a total of 435 people within the sample who had disabilities / long term conditions affecting their day-to-day activities
- Young people (16-24 years) were more likely than other groups to have experienced a negative impact on day-to-day travel (36%), housing / accommodation (28%), and debt repayment (20%)
- Ethnic minority groups were more likely to have experienced issues with paying bills (52%) and housing/ accommodation costs (31%)
    - 119 respondents to the survey were from ethnic minority groups
- While those with children had experienced negative impacts on non-food treats (57%), holidays (50%), paying bills (46%), housing/ accommodation (26%), debt repayment (25%), and day-to-day travel (24%).

The research sought to understand the actions that had already been taken by households to deal with the cost of living situation, and to identify capacity to do more. Respondents were therefore asked to review a list of potential actions and for each to select whether they had already done this, would consider doing it or would not consider it. Results are shown in Figure 7.

Figure 7: Looking at the following list, which of these have you already done because of the cost of living situation, which would you consider doing in future and which would you not consider? Bases shown for individual statements in brackets (excluding those saying not relevant)



Respondents reported already having undertaken a range of actions to mitigate the impacts of the cost of living situation. Not surprisingly, given home energy was the area of greatest impact noted, most had already reduced their energy use at home, and amongst the remainder, most would consider doing this in future.

More than 6 in 10 had already reduced spending on treats for themselves and half had reduced spending on treats for their family. Again, if not already taken action to reduce spending on treats, most would consider this in the future.

Capacity exists to use up savings or increase income through work or benefits – with fewer already having done this, and many signalling willingness to do so if required.

In contrast, almost 6 in 10 rule out borrowing money; and half would not consider going without essential food items.

Some subgroups have already taken more action than others:

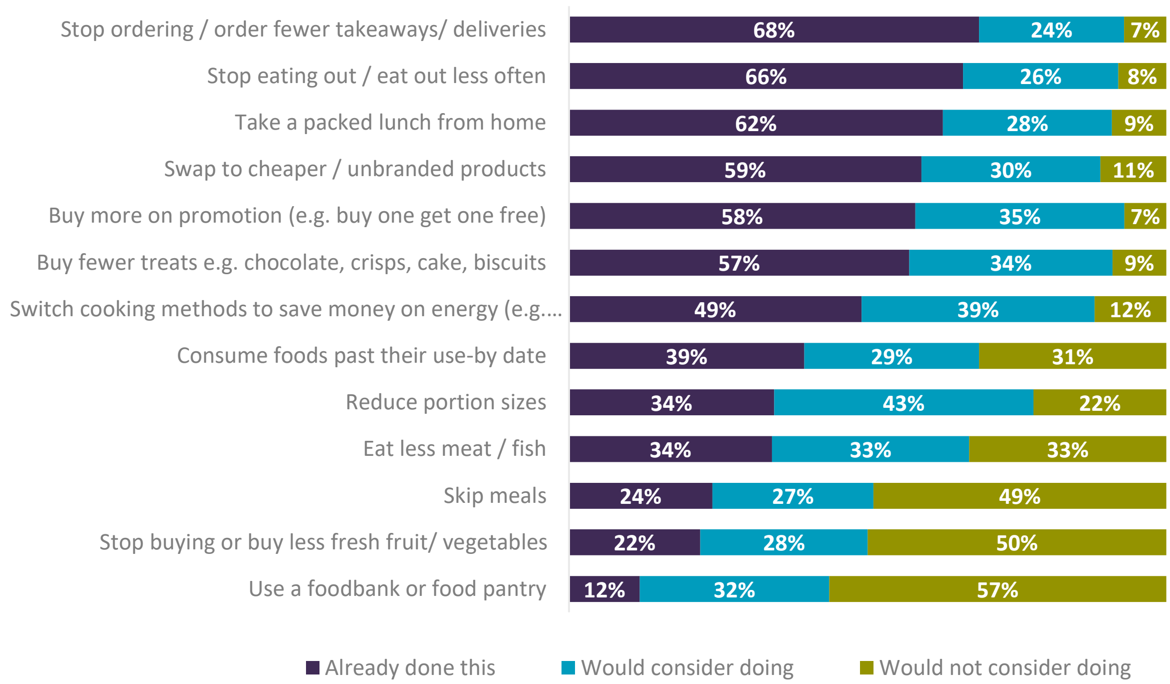
- Those with children at home are more likely to already have taken actions to maximise income:
    - 24% have taken on more paid work
    - 17% have already got more money through benefits
    - 16% have applied for one-off grants
    - 35% have used up their savings
    - 20% have borrowed money
- Those with children are also more likely than others to already have reduced spending on treats for themselves (64%) and others (54%)
- People in the lower socio-demographic groups (DE) have already tried to maximise income through benefits (18%) and grants (16%); while more than a third (36%) have used up savings
- DEs are also more likely than other socio-economic groups to have reduced spend on treats for themselves (64%); reduced home energy use (69%); and a fifth (21%) have gone without essential food items
- Younger age groups (16-24 years) were also more likely to have gone without essential food items (24%); and have taken on more paid work (36%); applied for one-off grants (18%); borrowed money (25%).

5.2 Impact of Cost of Living Situation on Food

Having established the impact the cost of living situation was having on general life for respondents, the survey then drilled down into the specific impacts on food.

Firstly, asking consumers to indicate which actions they had already taken, which they would consider in future, and which would not be considered at all. Data shown in Figure 8 excludes those who said 'not relevant' to each action.

Figure 8: Thinking specifically about food, which of the following have you already done because of the cost of living situation, which would you consider doing in future and which would you not consider? Base (all except those saying not relevant – various)



It is clear that the cost of living situation has impacted most adults across Scotland in terms of their eating habits, with two-thirds already having cut down on takeaways or delivery food and a similar number saying they eat out less often. Also, just over 6 in 10 already take a packed lunch from home. Most of those who have not already done so, would consider these actions in future.

Those most likely to have already reduced their frequency of eating out or ordering takeaway food were in the lower socio-economic groups – 75% of DEs have stopped or reduced their frequency of eating out and 74% have ordered fewer takeaways / deliveries.

The types of foods being bought and eaten have also changed for some – albeit this is less widespread. While around a third of the total sample said they were eating less meat or fish, this number rose to 38% of DEs and 45% of 16-24 year olds. Similarly although just over a fifth of the total sample said they were buying less fresh fruit and vegetables, this rises to 30% of those in the lowest socio-economic groups.

In contrast, some would not consider reducing consumption or purchase of meat, fish, fresh fruit and vegetables – a viewpoint held more dominantly by those in older age groups. More than half (56%) of those aged over 65 years said they would not consider eating less meat or fish; and three-quarters in this age group (76%) would not consider buying less fresh fruit or veg.

A significant minority said the cost of living situation had caused them to skip meals (24%) or reduce portion sizes (34%), while more than 1 in 10 had used a foodbank or food pantry and a further third would consider this.

Foodbank / food pantry usage was most likely amongst 16-24 year olds (23%) and those in DE socio-economic groups (19%). These were also the same parts of the population most likely to have skipped meals (16-24 years, 36%; DE, 33%) and reduced portion sizes (16-24 years, 39%; DE, 42%).

Almost half of respondents said they had changed their cooking methods to save money on energy, and many more were willing to consider doing this in future. Two-thirds had either already or signalled future willingness to consume foods past the use-by date, potentially leading to food safety concerns. Those in the youngest age group (16-24 years) were most likely to have already done this.

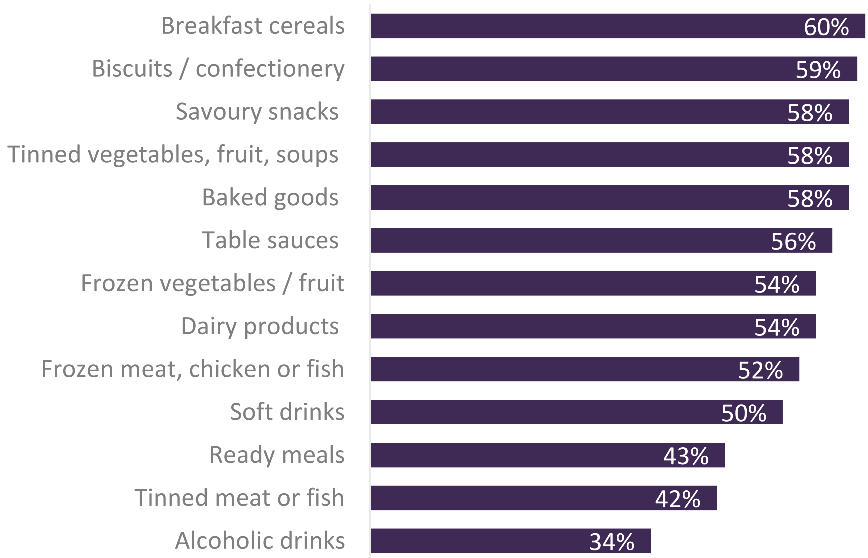
Shopping habits have also been impacted by the cost of living situation with almost 6 in 10 having swapped to cheaper or unbranded products, buying more on promotion and buying fewer food treats. Most of those who have not already done so would consider these actions if needed in future.

Again those in DE socio-economic groups were significantly more likely than others to have already taken action in relation to shopping:

- 64% have already swapped to cheaper / unbranded products
- 64% are buying fewer treats.

All respondents who said they either had already or would consider swapping to cheaper / unbranded products were asked which products they would be willing to swap. Respondents could select as many answers as they wished.

Figure 9: What types of food products have you / would you swap for a cheaper alternative? Base (Those who would swap to cheaper alternative) 634

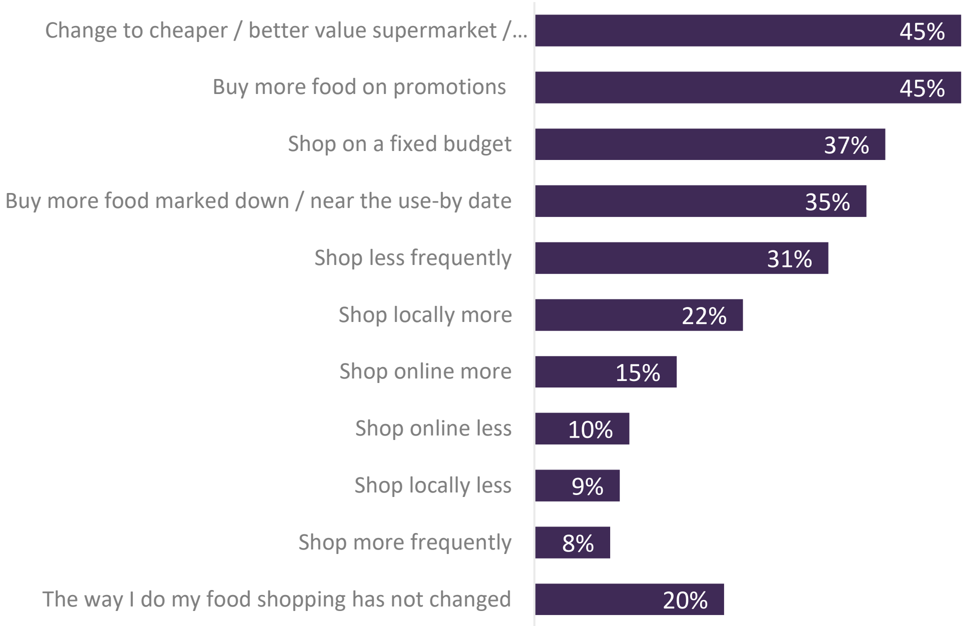


As the data shows, more than half of those who have or would consider swapping to cheaper products were open to doing so across a range of product types. Packaged goods, including cereals, biscuits and confectionery, savoury snacks, tinned foods and table sauces were the most commonly substituted for cheaper alternatives. However, baked goods, dairy products and frozen foods were also common swaps.

Branded alcoholic drinks were the least likely item on the list to be swapped with just a third saying they would substitute this type of product.

A further question was asked to understand more about how shopping habits have changed as a result of the cost of living situation, with results shown in Figure 10 below.

Figure 10: Has the way you do your food shopping changed in any of the following ways as a result of the cost of living situation? Base (All) 1764



Only a fifth of adults across Scotland said their shopping habits had not changed in relation to the cost of living situation. The most common changes noted were swapping to cheaper or better value supermarkets and buying more food on promotion – each mentioned by just under half of respondents.

Almost 4 in 10 said they were now shopping on a fixed budget; a practice more prevalent amongst young and mid age groups (16-34 years, 47%, 35-54 years 44%) and those with children at home (45%).

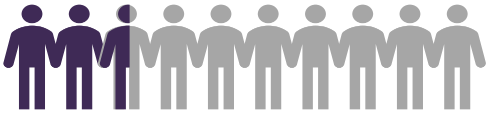
More than a third reported buying more food that was marked down or near the use-by date, with 4 in 10 of those in DE socio-economic groups doing this.

5.3 Food Insecurity

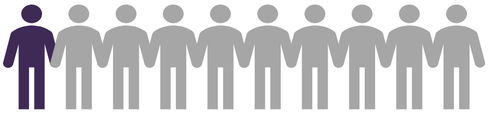
Data already shared in Figures 7 and 8 above, suggests the cost of living situation has resulted in food insecurity for a significant minority of the Scottish population:

18% have gone without essential food items

24% have skipped meals

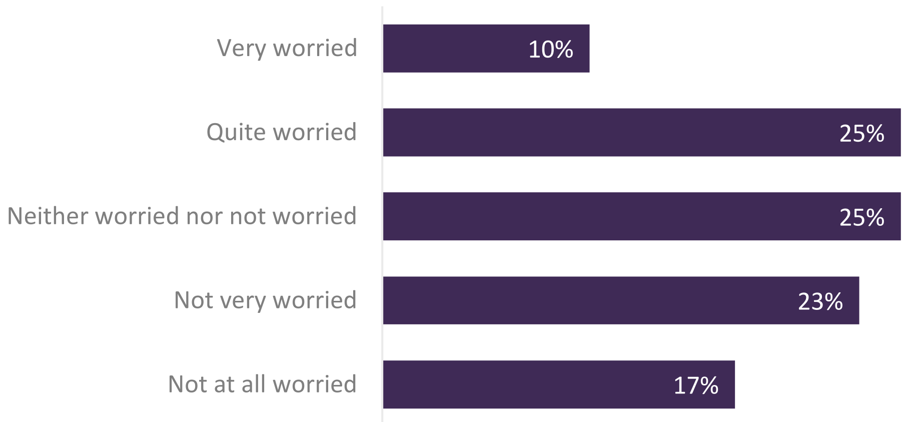


12% have had to use a foodbank or food pantry



Further to this, respondents were asked about their level of concern about being able to afford food for themselves and their household for the month ahead.

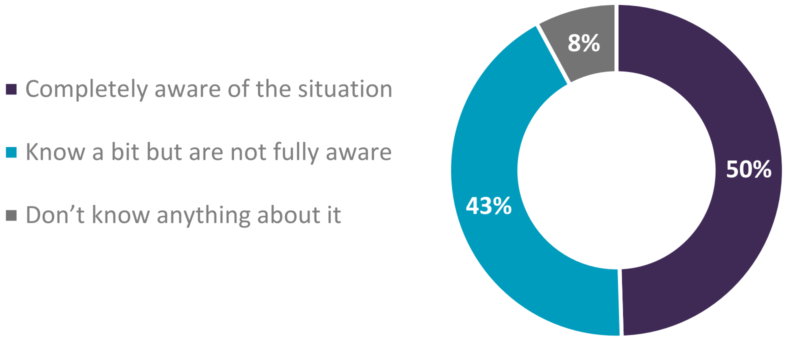
Figure 11: To what extent are you worried about being able to afford enough food for yourself and your family in the next month? Base (All) 1764



Over a third of respondents said they were worried, with 1 in 10 'very' worried, about being able to afford enough food for their families in the next month. Levels of concern were highest amongst the younger age groups (44%), those with children (44%) and people in DE socio-economic groups (42%).

As can be seen in Figure 12, not everyone who is worried about affording food has shared their concern with other household members.

Figure 12: Are other members of your household aware that you are worried about being able to afford food? Base (Those worried, households 2+ persons) 462

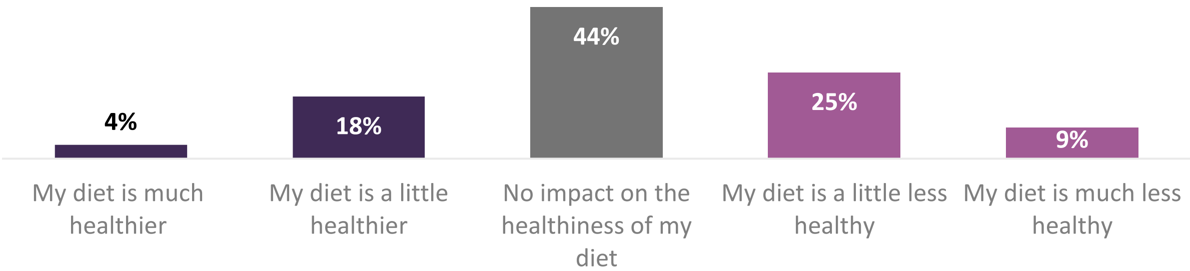


Respondents in the highest AB socio-demographic groups (57%) and those with children at home (51%) were significantly more likely than other groups to say household members know a bit but are not fully aware of the situation.

5.4 Impact of Cost of Living Situation on Diet

The final area of exploration in this part of the survey was the perceived impact of the cost of living situation on respondents' diets. Two questions were asked – firstly to ascertain whether there had been an impact on how healthy respondents' diets were (Figure 13), and secondly to understand whether healthy eating was more or less of a priority in the current climate (Figure 14).

Figure 13: Do you feel the cost of living situation is having an impact on how healthy or unhealthy your diet is? Base (All)1764



More than two-fifths of adults across Scotland felt the cost of living situation has had no impact on how healthy their diet is – this was most common amongst those in older age groups (65+ years, 68%) and the highest socio-economic groups (AB, 52%).

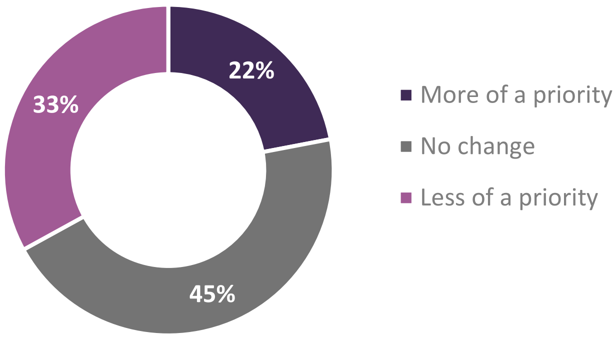
Just over 1 in 5 said their diet was healthier; while around a third said their diet was less healthy as a result of the cost of living situation.

Similarly, 45% of respondents said the extent to which eating healthy food was a priority for them had not changed – again more likely to be older ages and higher socio-economic groups. A fifth said healthy eating was more of a priority for them now during the cost of living crisis, while for a third it was considered less of a priority.

Key subgroups placing **less** of a priority on healthy eating at this time were:

- Those with children at home = 39%
- People in mid-low socio-demographic groups = C1 36%, C2 35%, DE 36%.

Figure 14: Is eating healthy food more or less of a priority for you during the cost of living crisis? Base (All) 1764



5.5 Conclusions – Cost of Living

Data clearly shows that the vast majority of households in Scotland have been significantly impacted by the cost of living situation. Financial concern is widespread with almost 7 in 10 worried about their household finances now, and a similar proportion worried about the year ahead, suggesting a fairly pessimistic outlook.

People from all demographic groups have seen different aspects of their lives impacted; from home energy costs to socialising, eating out and purchasing treats (food and non-food). And many have adapted their usual behaviour to reduce outgoings in these areas, with most prepared to do more.

Some capacity exists to further reduce outgoings and to increase income, with many not yet having taken action in these areas but signalling a willingness to do so.

However, those in the lowest socio-economic groups have seen the greatest impacts and are significantly more likely to have already tried maximising income and reducing outgoings in a wide range of areas of their lives, leaving less capacity to do more.

The impacts of the cost of living crisis are also evident across the food environment.

While some say they are placing greater focus on eating a healthy diet, and feel their diet has become healthier during the cost of living situation, more say this has become less of a focus and that their diet has become less healthy.

Consumers have changed shopping, cooking and eating behaviours to save money – swapping supermarkets and products for cheaper options, and changing cooking methods to save energy.

Food insecurity is also an issue resulting from the cost of living situation, with a significant minority worried about affording food in the next month, and almost a fifth already having skipped meals due to lack of money. This is disproportionately affecting younger age groups, people with children and those in the lowest socio-economic groups.

6. EATING OUT OF HOME

The second key topic to be covered in the survey was eating out of home. In the introduction to this section, respondents were shown an explanation of the meaning 'eating out of home' for the purposes of this research, as follows:

"The next set of questions are about eating out. When answering, please think of eating out as including everything from eating in a restaurant, café, fast food outlet, workplace canteen, to buying

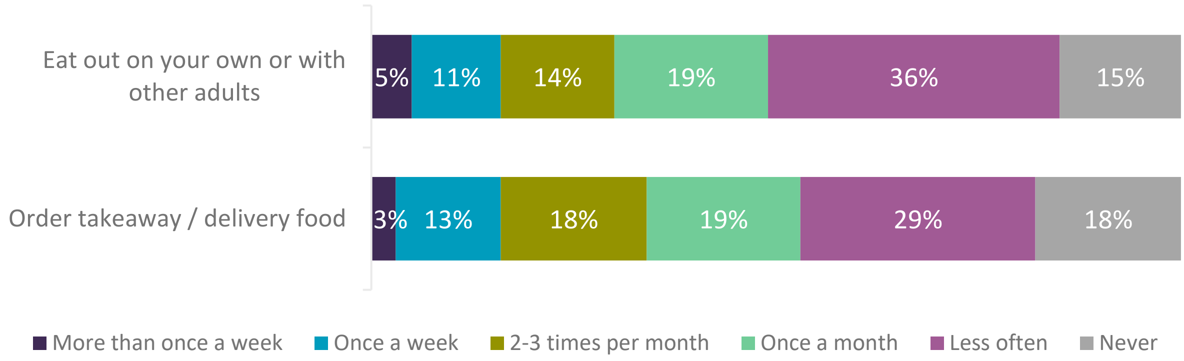
food to eat on the go from a sandwich shop or convenience store, or ordering takeaways / delivery food."

While this explanation was presented at the beginning of the section, on a separate screen, and some of the key wording was repeated in individual questions, it is difficult to know the extent to which respondents fully considered all out of home eating when answering.

6.1 Frequency & Reasons for Eating Out of Home

Respondents were firstly asked to outline their frequency of eating out in an average month. Data in Figure 15 is shown separately for eating out and ordering takeaways or delivery food.

Figure 15: Thinking about buying and eating food when you're not at home, how often in an average month do you: Base (All) 1764



1 in 6 adults in Scotland said they eat out at least once a week, either alone or with other adults. A further third eat out less than once a week but more than once a month. Just over a third said they eat out less often than once a month and 15% never eat out. It is worth noting that the frequency of eating out reported in this survey is lower than that in other data sources and may be an underrepresentation of the true picture.

Data for ordering takeaways or delivery food was very similar with 16% ordering at least weekly; 37% 1-3 times a month and almost half ordering less often or not at all.

Those in younger age groups (16-24 years) reported the highest frequency of both eating out and ordering takeaways:

- 25% of 16-24 year olds were eating out once a week or more often
- 21% were ordering takeaway once a week or more often.

Those with children at home also reported higher frequency of eating out or ordering takeaway / delivery foods:

- 18% eat out alone or with other adults at least weekly
- 22% order takeaways at least once a week.

In contrast, those in lower socio-economic groups were more likely to say they had eaten out or ordered takeaway less often than monthly, or not at all in the past month:

- Eating out: 41% of C2s less often than monthly; 39% of DEs less often than monthly and 25% never
- Takeaways / delivery food: DEs 35% less often than monthly and 23% never.

It is interesting to note that these figures show considerably less frequent eating out than data from the Food In Scotland Consumer Tracking Survey (Wave 14) undertaken in June 2022, where 36% of adults in Scotland said they had purchased food to eat out of home at least once a week in the previous month; and a further 41% said they had done so 1-3 times per month. While the data is not directly comparable, this would perhaps suggest a significant impact as a result of the cost of living situation – as highlighted in the previous chapter, cutting down on eating out is an area where many have already taken action to save money.

Data on frequency of ordering takeaway or delivery food also shows some differences to that in the Consumer Tracking Survey, albeit not to the same extent – 22% in the Tracker report ordering takeaways at least once a week; and 41% between 1 and 3 times per month.

Indeed the data backs up this assertion that the cost of living situation has significantly impacted frequency of eating out or ordering takeaways:

- a majority of those who eat out alone or with other adults **less often than once a month** say they have already reduced frequency / stopped eating out due to the cost of living situation (73%)
- similarly, two-thirds of those ordering takeaways / delivery food **less often than once a month** say they have already reduced frequency / stopped ordering takeaways due to the cost of living situation.

As can be seen in Figure 16 overleaf, the most common reason for eating out is as a treat. Enjoying social time with others and simple enjoyment are also important motivators for some. Respondents were able to select as many answers as they felt were applicable.

Figure 16: What are the main reasons you eat out (including buying food on the go and takeaway/ deliveries)? Base (All) 1764

While practical reasons like ease and convenience do feature, the predominant motivations for respondents to eat out are around enjoyment and pleasure.

Those in the youngest age group (16-24 years) were more likely than others to be motivated to eat out due to it being easier (24%) and tastier (19%) than cooking at home. They also cited not having time to cook at home (20%) and not being good at cooking (14%) as reasons to eat out.

Older and more affluent groups were more likely to focus on the social aspect and treating themselves as key motivators.

It is interesting to note that regardless of the frequency with which respondents were eating out, the top motivation was 'for a treat'. However, for those eating out once a week or more often, other factors are also important:

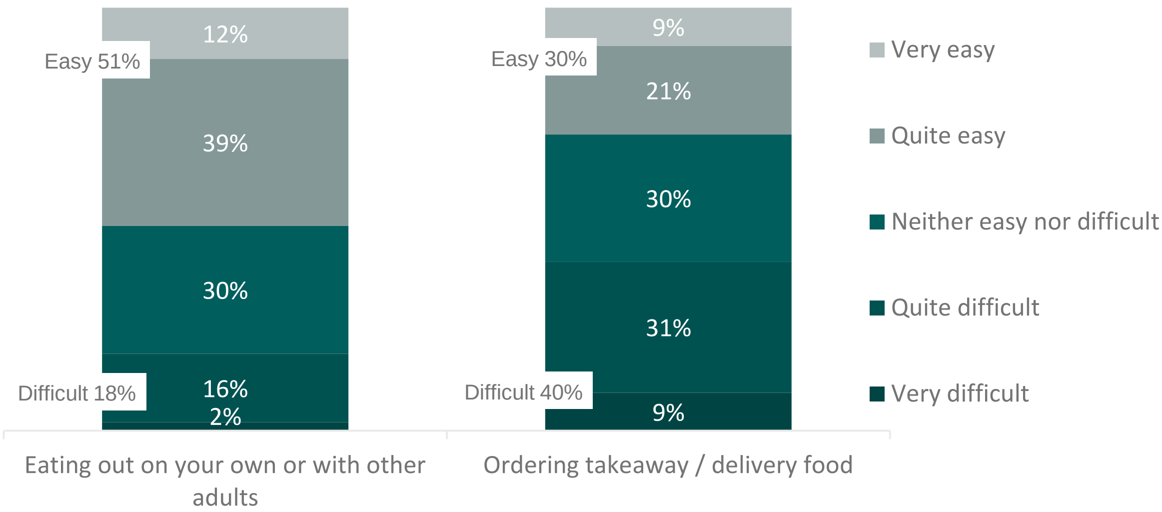
- For a treat - 58%
- I enjoy it - 52%
- To spend time with family / friends - 47%.

In contrast for those eating out less often than once a month, 'for a treat' is the key motivation with 74% citing this.

6.2 Healthy Options Out of Home

Those respondents who did not say 'never' to eating out on their own or with other adults, or ordering takeaway or delivery foods, were asked how easy or difficult it is to find healthy options in that setting.

Figure 17: How easy or difficult is it to find healthy options when….?: Base - Those who ever eat out a) alone / with other adults 1497 b) order takeaway / delivery foods 1407



Around half of adults in Scotland who eat out either on their own or with other adults said they feel it is easy to find healthy options; while almost a fifth said finding healthy options is difficult. It is important to note that respondents interpreted 'healthy options' in their own way, rather than being given a definition, meaning this is subjective.

In contrast, fewer than a third of those who order takeaway or delivery foods claimed to find it easy to find healthy options with 4 in 10 saying it's difficult.

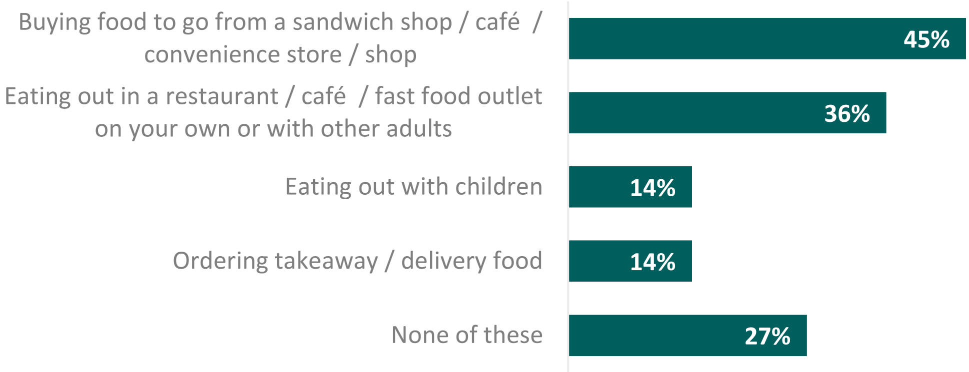
People in the AB socio-demographic groups were more likely to consider it easy to find healthy options when eating out alone or with other adults (58%) compared with 48% of those in DE groups.

Those in the youngest age groups appeared to find it particularly difficult to find healthy options when eating out:

- 30% of 16-24 year olds said it's difficult to find healthy options when eating out on their own or with other adults
- 49% of 16-24 year olds said it's difficult to find healthy options when ordering takeaways or delivery foods.

Looking more specifically at purchasing healthy options in different out of home settings, Figure 18 shows that healthy options are most likely to be chosen when buying food to go (45%) or when eating out alone or with other adults in a restaurant (36%).

Figure 18: In which of these situations are you most likely to choose a healthy option? Base (All) 1764



More than a quarter of respondents said they would not choose a healthy option in any of these settings. This view was more prevalent amongst males (31%), over 65 year olds (41%) and those in DE socio-economic groups (36%).

6.3 Eating Out with Children

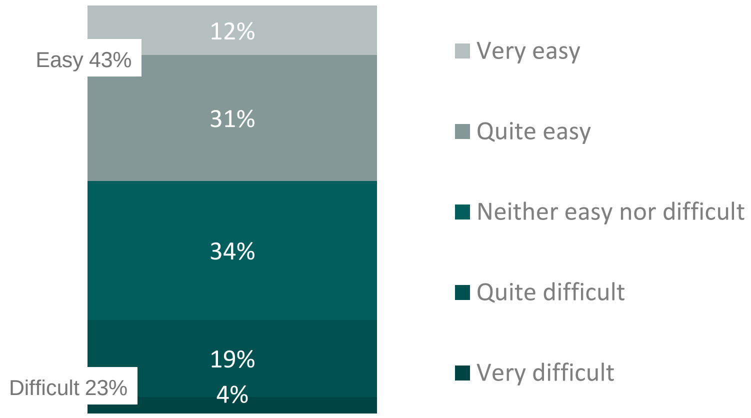
A series of questions were asked about eating out with children. Firstly, the frequency of eating out with children in an average month, shown in Figure 19 below.

Figure 19: Thinking about buying and eating food when you're not at home, how often in an average month do you eat out with children: Base (All) 1764

Just 7% of respondents said they eat out with children once a week or more often, with a further fifth (21%) doing so between 1 and 3 times in an average month. Almost half of the sample never eat out with children.

Those who do eat out with children were asked how easy or difficult it is to find healthy options with data shown in Figure 20.

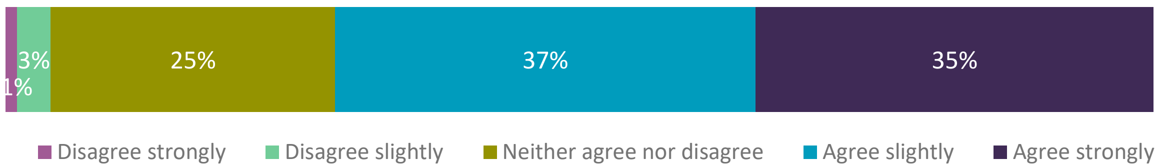
Figure 20: How easy or difficult is it to find healthy options when eating out with children?: Base (Those who eat out with children) 889



While just over 4 in 10 of those who eat out with children said they find it easy to find healthy options, almost a quarter find it difficult. And as can be seen in Figure 18 above, just **14%** say they are most likely to choose a healthier option when eating out with children

Views across the whole sample are clear, with 72% of adults agreeing that children's menus should be healthier.

Figure 21: To what extent do you agree or disagree with the following statement: Children's menus should be healthier Base (All) 1764

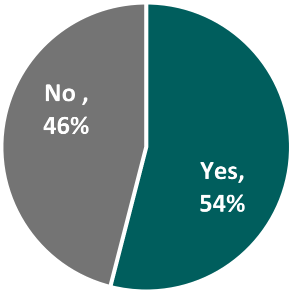


Those in higher socio-economic groups showed significantly higher levels of agreement on this with 81% agreeing strongly or slightly. Those with children at home (base 494) were also more in favour with 77% agreeing, compared with 69% of those with no children at home (base 1270).

6.4 Takeaways & Delivery Food

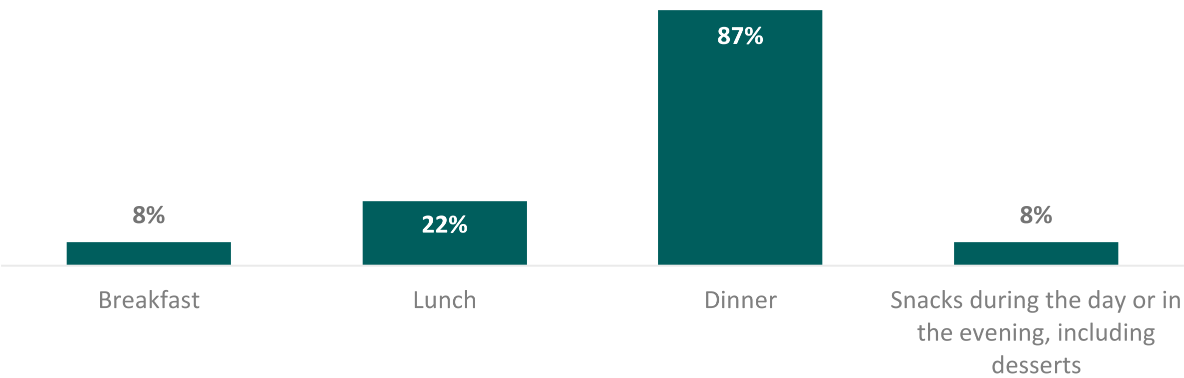
As highlighted earlier, in Figure 15, ordering takeaways or delivery food is a regular occurrence across the Scottish population with 1 in 6 ordering food once a week or more often. To understand the impact online and app ordering has had on takeaway / delivery food ordering, a series of questions were asked.

Figure 22: Thinking now specifically about takeaway / delivery foods, do you order online via websites, or apps like Just Eat, Deliveroo or Uber Eats? Base (All) 1764



More than half of adults in Scotland use apps or order takeaways / delivery food online, with those aged under 45 years significantly more likely to do this than other age groups (81%).
Respondents reported ordering all types of meal online or via app – breakfast, lunch, dinner and snacks – with dinner being by far the most common.

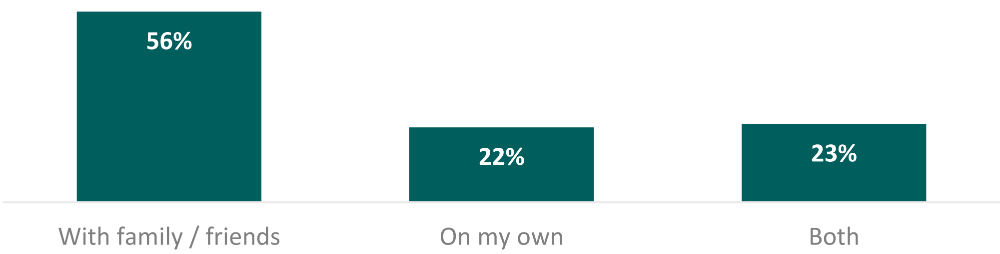
Figure 23: Which of the following types of meal do you tend to order online via websites or apps? Base (Those who order online/use apps) 957



Those in younger age groups (16-34 years) were more likely than others to order lunch in this way (24%). And those who order breakfast via apps or online were also more likely than others to order lunch and / or dinner.

As can been seen in Figure 24, the majority of respondents who order online or via apps do so when they are with others – 79%. However, ordering in this way is also common when on their own – with 45% doing this.

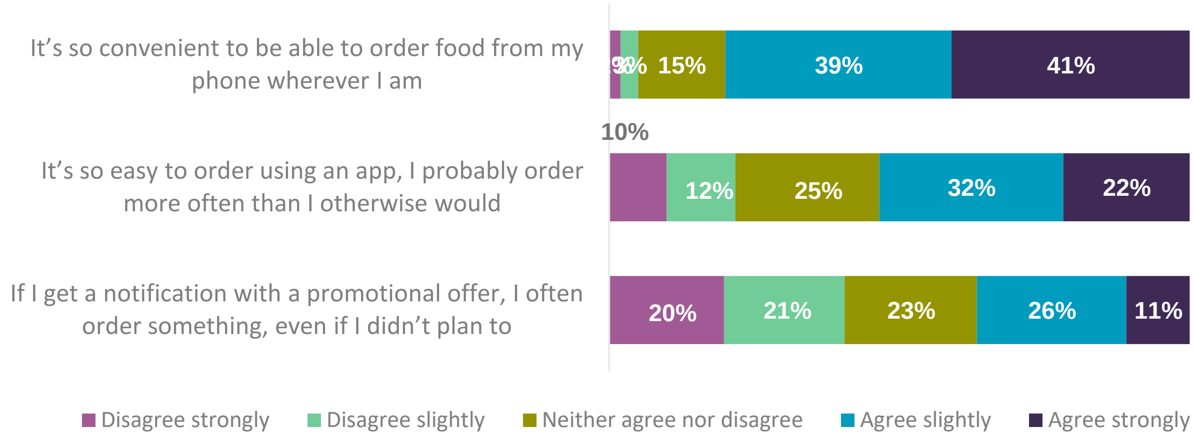
Figure 24: Do you tend to order online via websites or apps when you are with family / friends or when you are on your own? Base (Those who order online/use apps) 957



Those in the youngest age group (16-24 years) were more likely than others to order online or via apps when alone (54%); while those with children at home were the most likely to order in this way when with family / friends (85%).

Respondents were asked the extent to which they agreed or disagreed with a series of attitudinal statements about ordering takeaway food using websites or apps.

Figure 25: To what extent do you agree or disagree with the following statements about ordering takeaway food using websites or apps? Base (Those who order online/using apps) 957



The convenience of ordering takeaway / delivery food via apps or online is clear, with 8 in 10 agreeing that it’s convenient to be able to order from their phone wherever they are. This view is consistently held across the demographic groups.

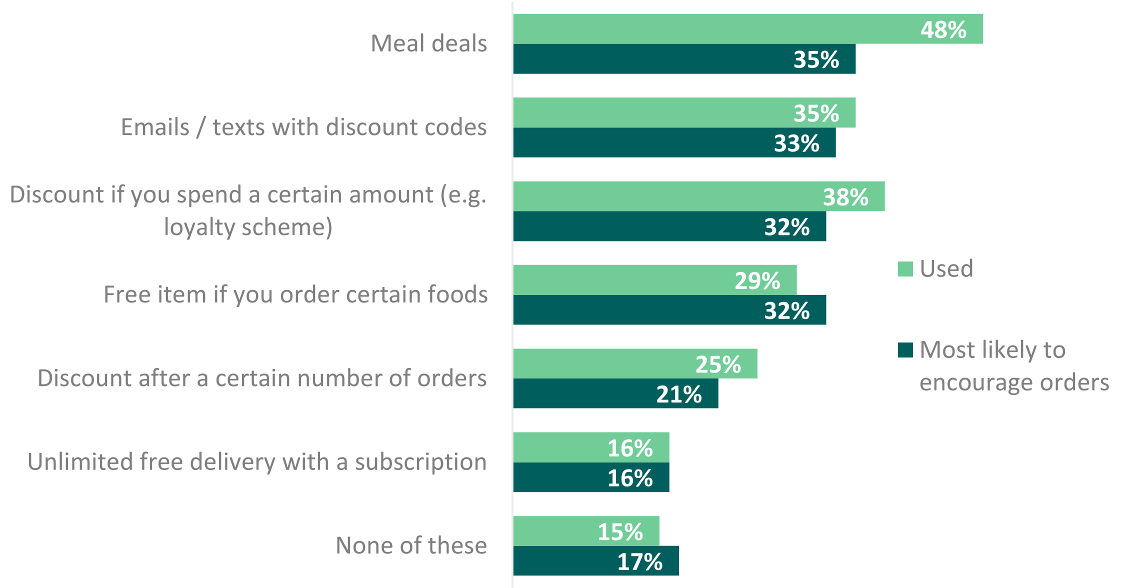
Beyond this, the ease of ordering via an app means more than half order **more often** than they otherwise would. Almost a third (31%) of young people aged 16-24 years strongly agreed with this statement, highlighting the impact of apps on this audience who are already ordering more frequently than those in other age groups.

Notifications with promotional offers also have an impact with 37% saying that receiving a notification like this will result in them ordering something even if they had not planned to do so. This is broadly consistent across demographic groups, although men do admit to being influenced in this way more than others (40%).

Promotional offers are widely used and their pull is clear. Meal deals, free items and discounts are the most used and also most likely to encourage orders. More than a third say they often order in response to a notification with a promotion.

The types of promotional offers used, and with greatest likelihood of impacting purchase behaviour are shown in Figure 26. Respondents who order online or using apps were able to choose as many answers as they wished for both questions.

Figure 26: Which, if any, of the following promotional offers from takeaway/ delivery food websites and apps do you tend to use? And which of these is most likely to encourage you to order takeaway/ delivery food when you hadn’t planned to or order more food than you had planned? Base (Those who order online/using apps) 957



The first point to note is that just 15% of those ordering online or on apps do not use any of these promotional offers. This was more prevalent amongst those in older age groups who are also less likely in general to be ordering online or using apps (28% of those 55 years or older do not use promotional offers).

For the majority however, promotional offers are widely used. Offers relating to additional food – such as meal deals and free items when ordering certain foods – were used by many as were all types of promotion featuring discounts.

The types of promotion which have greatest impact are meal deals, free items when ordering certain foods, discount codes and loyalty scheme discounts – each mentioned by around a third as being the most likely to encourage them to order.

Those in the youngest age group, 16-24 years, were significantly more likely than others to use the following promotional offers:

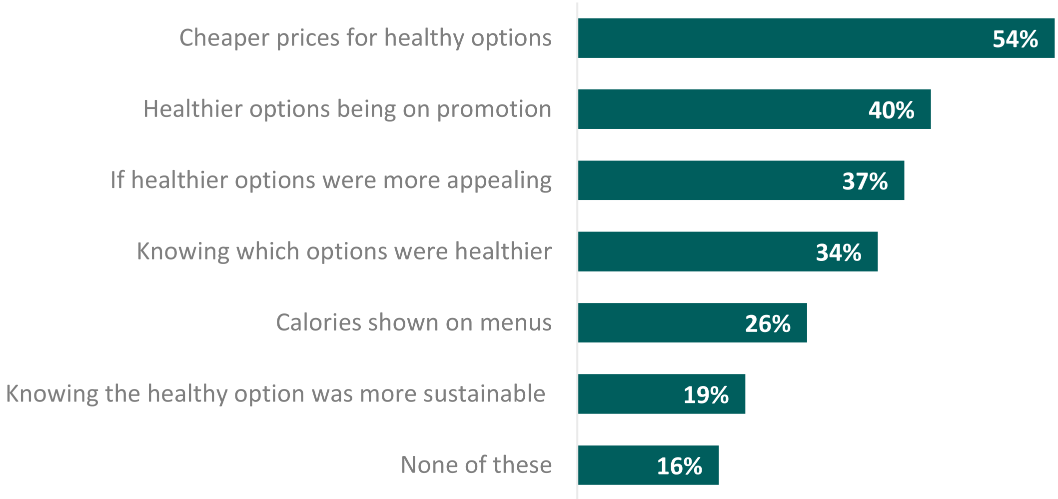
- Free item when ordering certain foods – 39%
- Discount after a certain number of orders – 30%
- Unlimited free delivery with subscription – 24%

40% of 16-24 year olds said promotions which offer a free item when ordering certain foods were most likely to encourage them to order – a significantly higher proportion than other sub-groups.

6.5 Making Healthier Choices Out of Home

Respondents were presented with a range of options and asked to select which would encourage them to make a healthier choice when eating out. Respondents could select as many answers as they wished.

Figure 27: Which of the following would encourage you to choose a healthier option when eating out (including food on the go and takeaway/ deliveries)? Base 1764



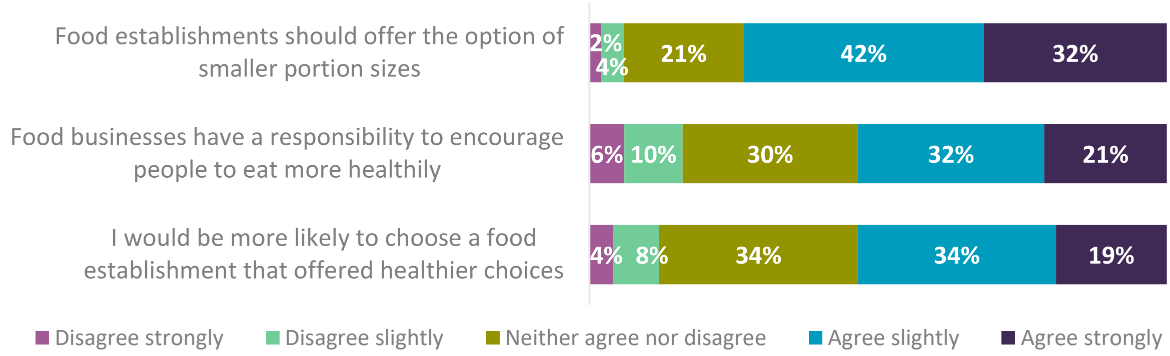
The most common response from adults in Scotland was that lower prices would encourage them to make healthier choices, and the second most common response was healthy options being on promotion. It is perhaps not surprising that financial incentives would be most popular given the issues facing many due to the cost of living situation. Indeed, data shows that those who reported the cost of living as having a significant negative impact on their household finances (giving scores of 8-10 on the impact scale), were significantly more likely than others to select cheaper prices (65%) and promotions (46%) here.

Another potential motivation to making healthier choices when eating out of home, cited by almost 4 in 10, was healthy options being more appealing. Increased knowledge of which options were healthier would encourage healthier choices for around a third, higher amongst those in AB socio-economic groups (43%) and those with children at home (38%). And a quarter mentioned showing calories on menus as a potential motivator. Sustainability was a factor for only around a fifth.

Women were more likely to say all of these would encourage healthier choices (except sustainability), while almost a quarter of men (22%) said none of these options would motivate them to make healthier choices when eating out of home.

Respondents were asked to indicate their thoughts on the role food businesses should play in encouraging healthy eating through a series of attitudinal statements, with results shown in Figure 28.

Figure 28: To what extent do you agree or disagree with the following statements? Base (All) 1764



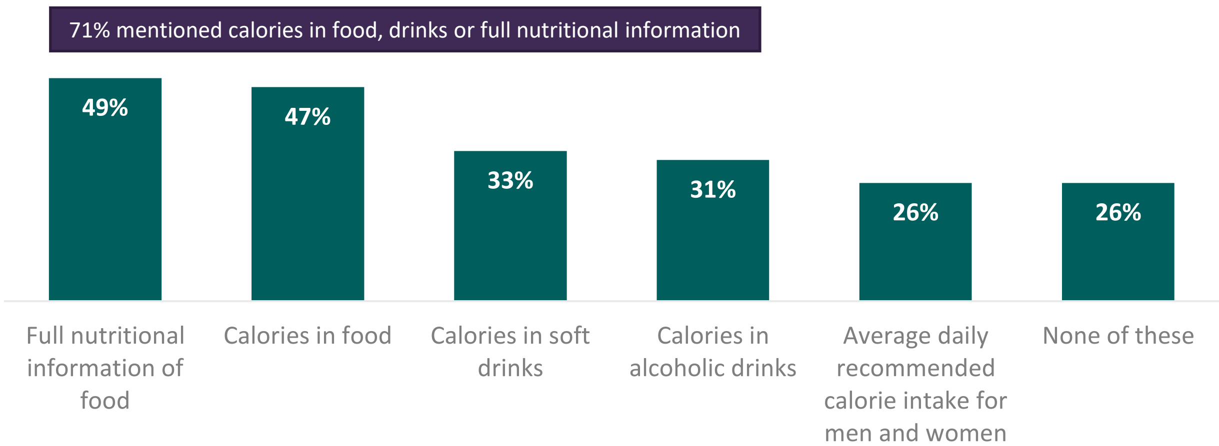
Over half of adults across Scotland (53%) indicated they think food businesses have a responsibility to encourage healthier eating, and the same proportion said they would be more likely to choose a food establishment that offered healthier choices.

Smaller portion sizes are also something a majority (74%) believe should be on offer when eating out, with women (79%) and those aged over 75 years (85%) particularly in favour of having this option.

6.6 Calorie Labelling

A key topic within this section of the survey was calorie labelling in the out of home environment. Respondents were firstly asked what types of information they felt should be available on menus when eating out of home. They were able to select as many options as they wished.

Figure 29: Which of the following types of information do you think should be available on menus when eating out (including food on the go and takeaway/ deliveries)? Base (All) 1764



Almost half of all respondents thought out of home menus should show the full nutritional information of food, and a similar proportion (47%) said calories in food should be shown. Indeed, 7 in 10 support some form of calorie information being shown on menus.

Around a third were in favour of showing calories in either soft or alcoholic drinks; and a quarter wanted to see the average daily recommended calorie intake shown.

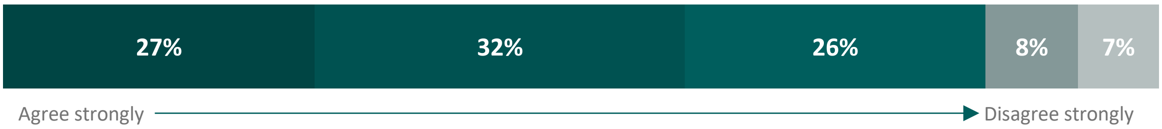
Data was broadly consistent across demographic groups, although women (50%) were more likely than men (44%) to want to see calories in food; and those in C2DE groups were more interested in seeing the average recommended intake, than others (31%).

A significant minority (26%) indicated that they did not want to see any nutritional or calorie information presented on menus when eating out. This was most prevalent amongst those in older age groups, with 34% of over 65 year olds expressing this view.

When asked outright, whether they agreed or disagreed that calories should be shown on all foods that can be bought when eating out, almost 6 in 10 (59%) agreed, while just 15% disagreed, highlighting broad support for provision of this information.

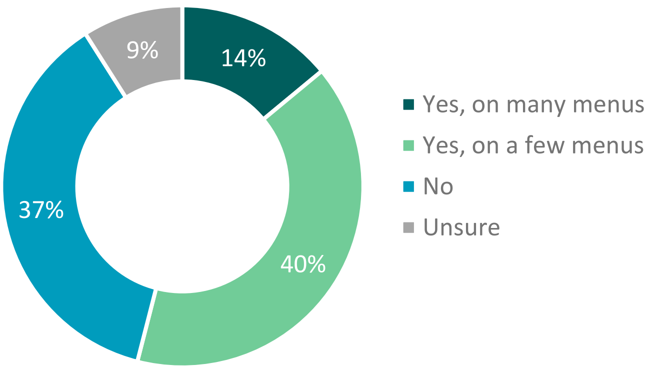
Data is shown in Figure 30.

Figure 30: To what extent do you agree or disagree that calories should be shown on all foods that can be bought when eating out? Base (All) 1764



Respondents were asked about the visibility of calorie information on menus in the out of home environment – including eating out, buying food on the go and ordering takeaways / delivery food.

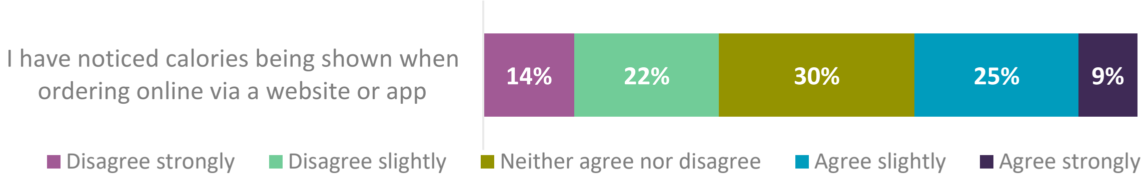
Figure 31: Have you noticed calories being shown on menus when eating out (including food on the go and takeaway/ deliveries) recently? Base (All) 1764



As can be seen in Figure 31 above, more than half of respondents (54%) had noticed calories being shown on menus when eating out – 14% saying they had noticed calorie information on a lot of menus, and 40% on a few menus. Almost 4 in 10 (37%) had not noticed this information at all.

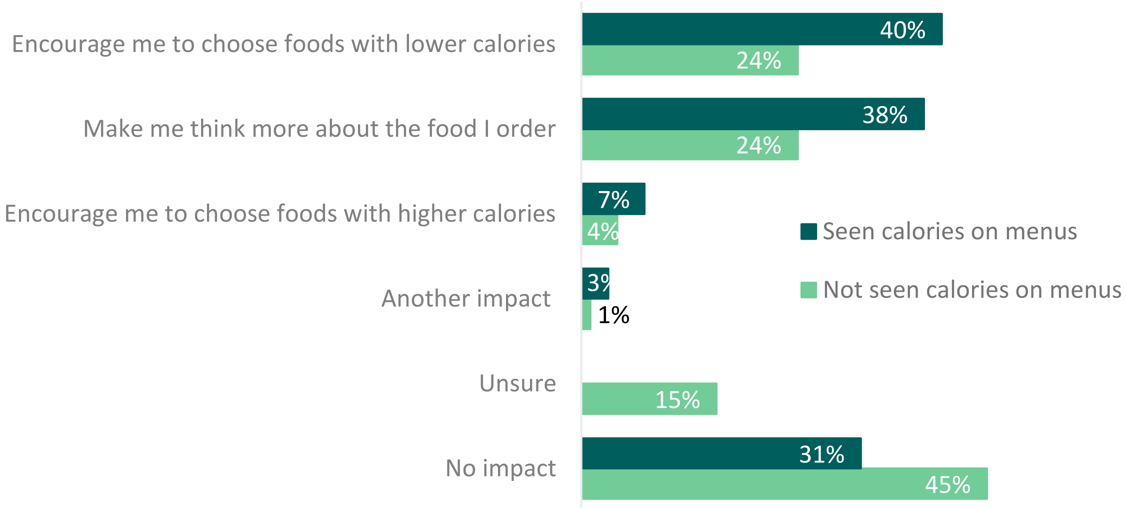
Recall of calorie information when ordering takeaways or delivery food online or via an app is lower, with just over a third (34%) agreeing that they had noticed calorie information on these platforms.

Figure 32: To what extent do you agree or disagree with the following statements about ordering takeaway food using websites or apps? Base (Those who order online/using apps) 957



The respondents who had noticed calorie information on menus when eating out were asked whether this had had an impact on them; while those who had not noticed calorie information were asked to consider the likely impact of seeing this information. The data from both questions is shown in Figure 33. In both cases, respondents could select as many answers as they wished.

Figure 33: What impact, if any, has calories being shown on menus had on you when eating out (including food on the go and takeaway/ deliveries)? Base (Those who have noticed calorie labelling) 951
What impact, if any, will calories being shown on menus have on you when eating out? Base (Those who have not noticed calorie labelling 813)



Over two-thirds (69%) of those who recalled seeing calorie labelling on menus when eating out reported that this had an impact on their behaviour. The most common impacts were in encouraging lower calorie choices, or making them think more about the food they order. A small number (7%) said they made a higher calorie choice as a result of seeing calories on the menu.

Anticipated impact for those who did not recall having seen calories on menus when eating out was less certain – with 15% saying they were unsure and 45% predicting calorie labelling would have no impact on their behaviour.

6.7 Conclusions – Eating out of home

1 in 6 adults in Scotland eat out and/or order takeaways or delivery food at least once a week. Although it must be borne in mind that this may be an under-representation of the true picture.

While frequency of both has reduced due to the cost of living situation, eating out of home in its broadest sense is still significant.

Apps and online ordering have contributed to consumers ordering more takeaways / delivery food through the easy and convenient method of ordering. And the widespread use of promotional alerts is leading to people ordering more food than planned, more often than they otherwise would.

While many say it is not difficult to find healthy choices when eating out, it's mostly for food to go that a healthy choice would be made, and more than a quarter of adults in Scotland will simply not choose a healthy option when eating out of home.

Respondents report that it is more difficult to find healthy choices when ordering takeaway or delivery food, as well as when eating out with children.

When asked to identify potential triggers to making healthier choices when eating out of home or ordering takeaway or delivery food, most consumers mention cheaper prices or healthy foods being on promotion – at least in part due to pressures of the cost of living situation.

There is clear support for food businesses to play a role and take some responsibility for the promotion and facilitation of healthy eating out of home, and consumers are keen to see smaller portion sizes being offered and healthier children's menus.

A majority support calorie labelling across all food being bought out of home, with significant support for full nutritional labelling too.

Calorie labelling is already starting to be noticed on menus, and where seen, is clearly having an impact on the choices made by consumers, with many making a lower calorie choice or saying that calorie labelling made them think more about their food choices.

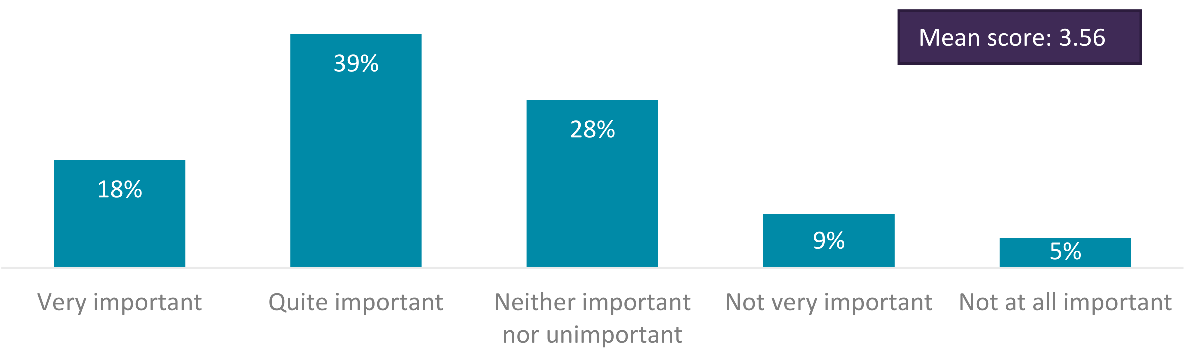
7. SUSTAINABILITY

The final key topic covered within the survey was **sustainability**. Questions were asked to ascertain the extent to which this is a priority for consumers; how informed they feel about sustainability; and how to make sustainable choices when purchasing food.

7.1 Importance of Sustainability in the Food Environment

Respondents were asked about the extent to which they felt it was important to buy food produced in a sustainable way.

Figure 34: How important is it to you that the food you eat is produced and packaged in a sustainable way that minimises the environmental impact? Base (All) 1764



More than half of respondents (57%) said it was important to them that the food they eat is produced and packaged in a sustainable way, with almost a fifth considering this to be 'very' important. Just 14% were not concerned about food production and packaging being done in a way that minimises the environmental impact.

There were some significant differences in attitudes across key subgroups, with those from ethnic minority backgrounds significantly more likely to say sustainable production and packaging is **'very'** important (25%) compared with 17% of those from white ethnic backgrounds. Also, those eating a vegan diet or pescatarian diet were significantly more likely to consider sustainability **'very'** important (40% of vegans; 37% of pescatarians)[2] than those following no particular diet (14%).

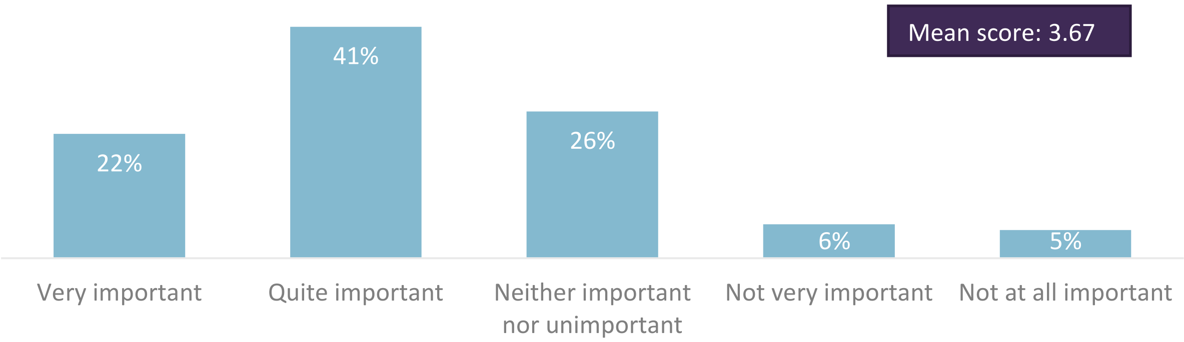
While not statistically significant, some additional differences were noted across age, socio-economic group and presence of children. Numbers shown in brackets refer to those saying 'very' or 'quite' important:

- those aged between 45 years and 64 years were more likely to say sustainability was important (63%) compared with younger age groups (48% of 16-24 year olds and 53% of 25-34 year olds).
- those in socio-economic groups AB and C2 were more likely to consider this important (62%, 61% very/quite important) than those in groups C1 (56%) and DE (53%).
- those with children aged under 16 years at home were more likely to consider sustainability in food important (60%) compared with those who had no children at home (56% very/quite important).

[2] Note: the numbers of those eating vegan or pescatarian diets within the sample is small (vegan n=46; pescatarian (n=62)

Respondents were also asked about the importance of their food being sourced in an ethical manner with consideration given to animals, the environment, and people.

Figure 35: How important is it to you that the food you buy and eat is ethically sourced (giving consideration to animals, the environment, and people)? Base (All) 1764



Just over 6 in 10 adults across Scotland said it was important that the food they buy and eat is ethically sourced, with over a fifth considering this 'very' important. Just 1 in 10 said ethical sourcing of food was not important for them. These figures are comparable with those on sustainability, presented above, and indeed data shows there is significant crossover between those who feel that sustainability in food production is 'very' important and those who feel ethical sourcing is 'very' important (68% of those who said sustainability was 'very' important also said ethical sourcing was 'very' important).

Several other significant differences were noted across subgroups of interest amongst those saying ethical sourcing was **'very' important**:

- Females (25%) compared with males (17%)
- Those from ethnic minority groups (32%) compared with those from white ethnic backgrounds (21%)
- Those following pescatarian (47%), vegetarian (46%) or vegan diets (51%).

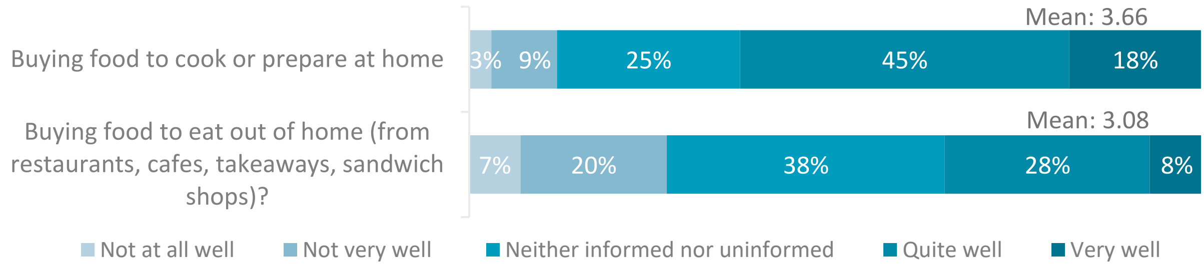
While not statistically significant, those in AB socio-economic groups were more likely to feel ethical sourcing was important ('very' / 'quite' 72%) as were those in the 45-54 year age bracket (67%).

It is clear that sustainable production and packaging and ethical sourcing of food are of importance to most consumers, albeit not their primary focus when buying food. This reinforces earlier findings which showed sustainability ranked at the bottom of the list of considerations when buying and preparing food, with cost, taste and healthy food of much greater importance.

7.2 Information about Sustainability in the Food Environment

In order to help understand decision making about sustainability in the food environment, respondents were asked to state the extent to which they feel well informed about how to make sustainable food choices in retail and out of home situations.

Figure 36: How well informed do you feel about how to make sustainable food choices when… Base (All) 1764



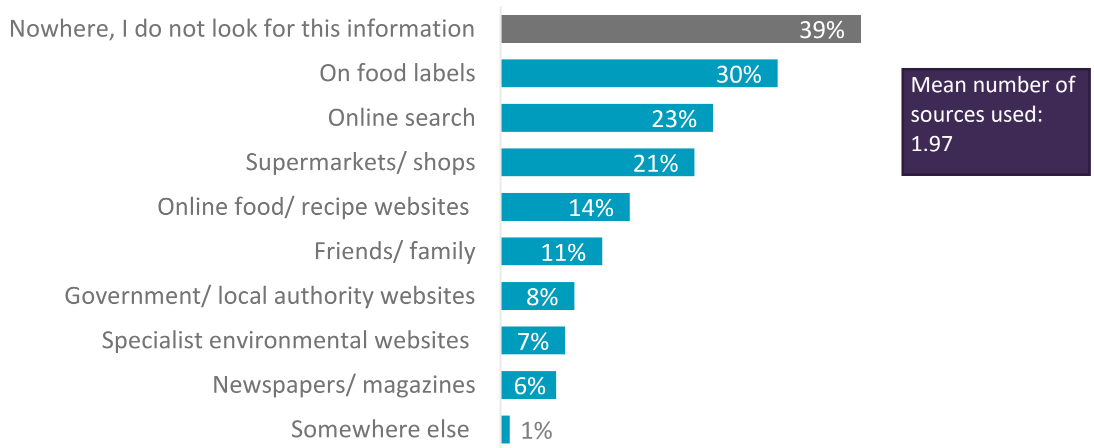
Consumers feel much better informed about how to make sustainable food choices when buying food to cook at home (63% 'very' / 'quite' informed) compared with when they are eating out of home (36%).

In both cases, younger age groups (16-34yrs) were significantly more likely than those in other age groups to feel informed (retail 67%; out of home 40%). Similarly, those with children at home were more likely to feel 'very' or 'quite' well informed about making sustainable choices in both retail and out of home environments (retail 68%; 43% out of home) compared with those who had no children (61% retail; 32% out of home).

Those from lower socio-economic groups (DE) were more likely than others to say they felt neither informed nor uninformed in each setting (32% retail; 44% out of home).

In order to understand where consumers look for information on sustainability in relation to food, a further question was asked, giving a list of potential sources both on and offline and asking them to select all the sources they use.

Figure 37: Where do you look for information about sustainability in relation to food? Base (All) 1764



The first striking point from responses to this question is the relatively high proportion – almost two-fifths – who said they do not look for any information about sustainability in relation to food. This was significantly more prevalent amongst older age groups (51% amongst those aged 65 years or older); those in lower socio-economic groups (43% DEs) and those with no children at home (42%).

Those who do seek information about sustainability tend to use a mix of online and offline sources, using an average of two sources in total. 3 in 10 rely on food labels and a fifth mentioned supermarkets or shops as a source of information on sustainability; in total 36% use any online source with almost a quarter using online search and 14% using food and recipe websites. Specialist websites and newspapers or magazines are less likely to be used as a source of information on sustainability.

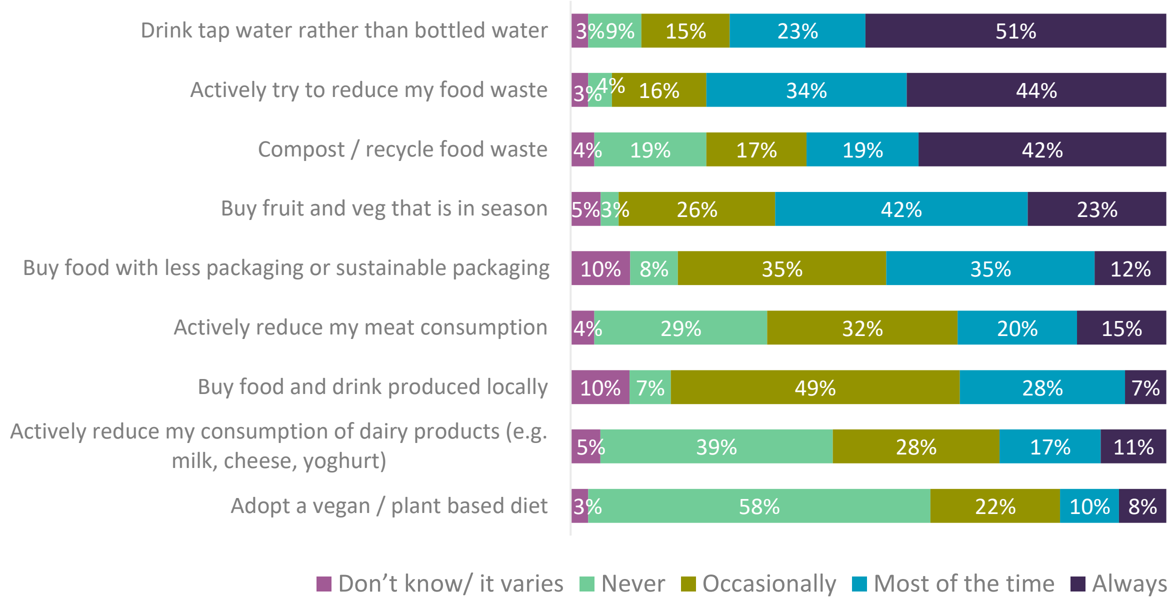
Those in younger age groups (16-34 years) were most likely to look for information on sustainability than other age groups (70%), and were also more likely to use online sources:

- Search (35%)
- Food websites (23%)
- Specialist environmental websites (12%).

7.3 Sustainable Behaviours

Survey respondents were shown a list of sustainable actions in relation to food and asked to indicate the frequency with which they adopted each of these behaviours, with results shown in Figure 38 below.

Figure 38: In general how often, if ever, do you do each of the following? Base (All) 1764



Drinking tap water, reducing and recycling food waste and buying seasonal fruit and veg are the sustainable actions taken by a majority of adults in Scotland always or most of the time. In contrast, changes to diets to actively reduce or avoid meat and dairy consumption are less frequently practiced. Other sustainable actions such as buying food with less or sustainable packaging and buying locally produced food and drink are done occasionally or depending on the circumstances.

Almost three-quarters say they drink tap water all or most of the time. While this practice is common across demographics, those in older age groups (65+ years, 78%) and higher socio-economic groups (AB, 81%) are slightly more likely than others to drink tap water regularly.

Reducing (78%) and composting or recycling (61%) food waste are also common behaviours adopted most or all of the time by adults in Scotland.

- Those aged over 65 years are significantly more dedicated than others in this regard, with 64% **always** composting/recycling food waste; and 60% **always** actively trying to reduce the food waste they produce.

* People with children at home were more likely to actively try to reduce food waste most of the time (38%) or occasionally (20%) while those with no children were more likely to always do this (48%).
* No consistent patterns emerge by socio-demographic group, however those in the most affluent group (50% of ABs) were significantly more likely to **always** reduce food waste compared to those in the least affluent group (42% of DEs).

Buying fruit and vegetables when in season is done most of the time or always by almost two-thirds of consumers, while buying from local producers is somewhat less common with just over a third always or mostly doing this.

* Over 65 year olds were significantly more likely to **always** buy in season (28%) compared with 19% of 16-34 year olds.
* While those in younger age groups (16-24 years, 14%; 25-34 years 12%) and with children at home (11%) were more likely than others to **always** buy locally, while older age groups were more likely to do this **most of the time** (35%).
* There were no notable differences by socio-economic group on either measure.

Looking at the actions taken by those who think sustainability in food is **'very' important** highlights that they are significantly more committed to practicing all of the sustainable behaviours listed:

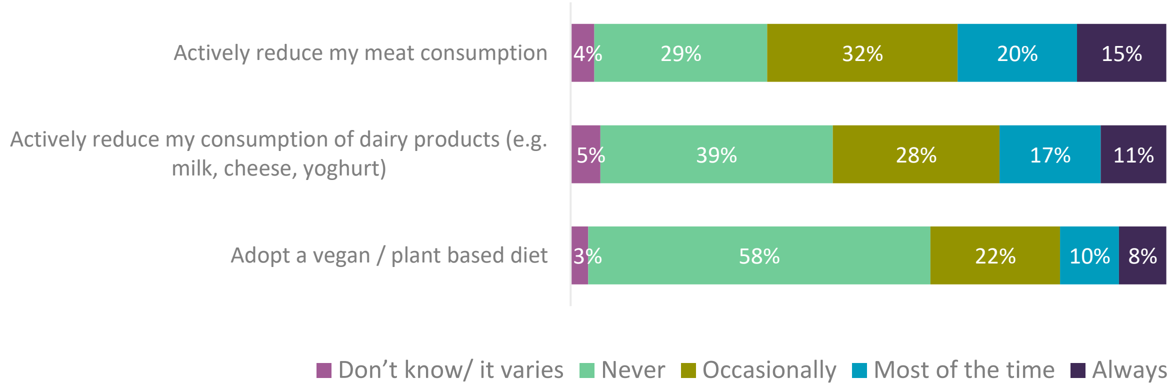
* Proportion of those who think sustainability in food is 'very' important who **always** adopt the following sustainable practices:
    * 64% actively try to reduce food waste
    * 61% drink tap water
    * 57% compost / recycle food waste
    * 34% buy fruit and veg in season
    * 27% actively reduce meat consumption
    * 26% buy food with less or sustainable packaging
    * 20% actively reduce dairy consumption
    * 13% adopt a vegan diet
    * 12% buy locally produced food and drink

This data highlights that even amongst this most committed group, there is still room to strengthen adoption of sustainable practices.

7.4 Reducing Consumption of Meat / Animal Products

Looking more closely at the data around modification of diet to reduce consumption of animal or meat products, there are some interesting findings.

Figure 39: In general how often, if ever, do you do each of the following? Base (All) 1764



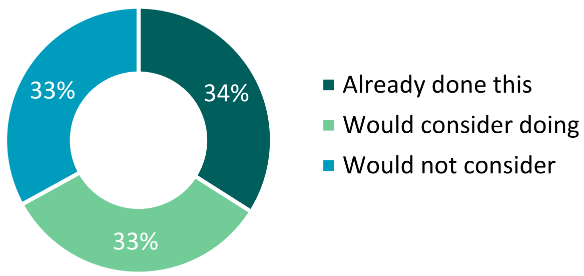
More than a third say they actively reduce meat consumption most or all of the time, while 28% actively reduce dairy intake.

Around a fifth of people from ethnic minority backgrounds said they 'always' reduce meat (22%) and dairy (20%) consumption, which is significantly higher than those from other ethnic backgrounds. Those aged 16-44 years were also significantly more likely than older age groups to 'always' reduce dairy consumption (15%); while females were more likely to be always reducing meat intake (18% vs 10% males).

While 8% say they adopt a vegan or plant based diet all of the time, a significant minority (32%) are eating a plant based diet at least occasionally. Those aged 16-24 years old are the most committed to vegan diets with 31% always or mostly eating plant based diets, a similar proportion to those from ethnic minority backgrounds (32% always/mostly).

The cost of living situation has also had an impact on consumption of meat and fish, as can be seen in Figure 40 below, with a third saying they have already cut back on meat / fish, and a further third willing to consider this in future to save money.

Figure 40: Looking at the following list, which of these have you already done because of the cost of living situation, which would you consider doing in future and which would you not consider? Eat less meat / fish. Base (All except those saying not relevant)



However, when asked to **describe their diet**, fewer commit to 'vegan' or 'actively reducing animal products' as definitive labels, as shown in the table below. This is partly due to the fact that some prefer to describe their diet as excluding certain foods for allergy, religious / cultural or medical reasons. In practice for many this equates to reduction of meat, dairy or animal products.

Table 2: Which best describes your diet? Base (All) 1764

No particular diet	**70%**
Pescatarian	**3%**
Vegetarian	**4%**

Vegan	**3%**
Actively reducing amount of meat, dairy or animal products consumed	**9%**
Exclude certain foods / ingredients due to allergy / intolerance	**3%**
Exclude certain foods / ingredients for religious or cultural reasons	**1%**
Exclude certain foods / ingredients for medical reasons	**3%**
Other / don't know / not answered	**4%**

Almost 1 in 10 adults across Scotland described their diet as 'actively reducing the amount of meat, dairy or animal products consumed.' This is in addition to the 3% who follow a vegan diet, 4% vegetarians and 3% pescatarians.

Females were more likely to be vegetarian (6% vs 2% males), but otherwise data is consistent by gender. Those in the 16-24 year age group were significantly more likely to be vegetarian (8%) or vegan (7%) than other ages.

Those with children at home (11%) were more likely than those without (9%) to say they were following a diet that actively reduces intake of meat, dairy or other animal products.

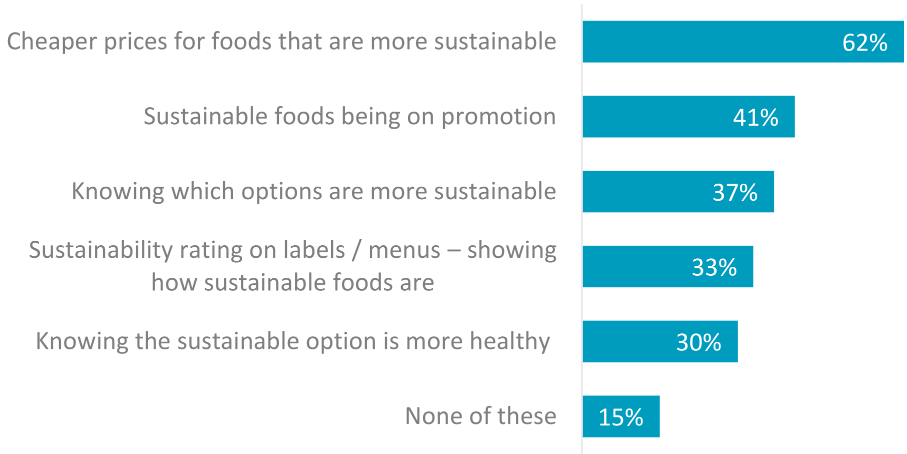
Of those actively reducing animal products in their diet, 25% said they always reduce meat intake with just over half (52%) saying they do this most of the time; while 15% always reduce dairy intake and 30% do this most of the time.

Across Figures 39 and 40 and table 2 it is clear that different factors influence meat and dairy consumption, including considerations about sustainability and cost as well as dietary reasons.

7.5 Motivations to Choose Sustainable Options

Respondents were asked what might motivate them to choose more sustainable options when shopping for food. A list of options was provided for them to choose from and respondents could select as many options as they wanted.

Figure 41: Which of the following would encourage you to choose more sustainable options when buying food? Base (All) 1764



Perhaps not surprisingly in the context of the cost of living situation, lower prices and promotions were cited as the most likely motivations to choose sustainable options when buying food.

Indeed, those most affected by the cost of living crisis (that is people who scored 8-10 on the scale of how negative an impact the cost of living situation was having on their household) were significantly more likely than others to mention cheaper prices (72%) and promotions (48%) as the key motivators to making sustainable food purchases.

Knowing more about which options are sustainable was also cited as a potential motivator, by almost 4 in 10. Females (41%) and those in AB socio-economic groups (47%) were more likely than others to mention this. And being able to identify how sustainable foods are via a sustainability rating on menus and labels was also of interest, albeit to a smaller proportion (33%). Again, support for this was greatest amongst females (38%) and those in AB socio-economic groups (39%). This was also of interest to all those following a specific diet – who are perhaps more comfortable with examining labelling and menus.

While not necessarily a key trigger to sustainable purchasing, the idea of knowing that a sustainable food was healthier would persuade 3 in 10 to make the sustainable choice.

Those who think sustainable production and ethical sourcing of food are important, were more likely to cite all of the motivators, except pricing.

Just 15% said none of the options presented would encourage them to make more sustainable purchases, a view which was more prevalent amongst older age groups (23% of 65+ year olds).

7.6 Conclusions – Sustainability

While a majority of consumers say sustainability and ethical sourcing of foods is important to them, in the context of other decision making criteria, such as cost, taste, healthy food and finding something the whole family will eat, concerns around sustainability are much lower priorities.

Consumers are already undertaking a range of sustainable behaviours on a regular basis, with drinking tap water, reducing and recycling food waste and buying fruit and vegetables in season being the most commonly practiced.

Fewer are committed to reducing meat and/or dairy consumption for environmental reasons.

When purchasing food in a retail environment most feel relatively well informed about how to make sustainable choices, looking to food labels and supermarkets or shops for this information.

However, when purchasing food from restaurants, cafes and takeaways, consumers feel much less informed about making sustainable choices, suggesting more could be done to help navigate sustainability in the out of home environment.

Those in younger age groups are much more engaged in looking for information on sustainability in food production and packaging, in line with their greater levels of concern on the topic. In contrast, older consumers are not necessarily looking out for this information.

The main route to encouraging more sustainable choices in food purchasing is through lower costs and more promotions, undoubtedly reflective of the context of generally high food prices and the cost of living challenges at the moment.

This further highlights the difficulty of effecting behaviour change in relation to sustainability while consumers are still struggling with the cost of living situation.

8. APPENDIX - QUESTIONNAIRE

Screening & Quota Questions (to ensure we achieve a representative sample)

Q1. **Do you identify as…? SINGLE CODE**

- Female
- Male
- Prefer to self-describe (_________________)
- Prefer not to answer – CLOSE

Q2. **Which of the following age groups do you fall into?**

- Under 16 - CLOSE
- 16-17
- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65-74
- 75+
- Prefer not to answer – CLOSE

Q3. **Which of the following groups does the Chief Income Earner in your household belong to?**

•The person in the household with the largest income is the Chief Income Earner, no matter how this income is obtained.

•If the Chief Income Earner is retired with an occupational pension, please select according to their previous occupation

•If the Chief Income Earner is not in paid employment and has been out of work for less than 6 months, please select based on their previous occupation

- **Semi or unskilled manual worker** (e.g. Manual jobs that require no special training or qualifications; Manual workers, Apprentices to be skilled trades, Caretaker, Cleaner, Nursery School Assistant, Park keeper, non-HGV driver, shop assistant etc.)
- **Skilled manual worker** (e.g. Skilled Bricklayer, Carpenter, Plumber, Painter, Bus/Ambulance Driver, HGV driver, Unqualified assistant teacher, pub/bar worker, etc.)
- **Supervisory or clerical / Junior managerial / Professional / administrator** (e.g. Office worker, Student Doctor, Foreman with 25+ employees, salesperson, Student Teachers etc.)
- **Intermediate managerial / Professional / Administrative** (e.g. Newly qualified (under 3 years) doctor, Solicitor, Board director small organisation, middle manager in large organisation, principal officer in civil Service/ local government etc.)
- **Higher managerial/ Professional/ Administrative** (e.g. Established doctor, Solicitor, Board Director in large Organisation (200+ employees), top level civil servant/ public service employee, Headmaster/mistress, etc.)
- **Student** (living away from home)
- **Retired** and living on state pension only
- **Unemployed** (for over 6 months) or not working due to long term sickness
- Prefer not to answer – CLOSE

Q4. **Which council area do you permanently live in?**

- Aberdeen City
- Aberdeenshire
- Angus
- Argyll and Bute
- City of Edinburgh
- Clackmannanshire
- Dumfries and Galloway
- Dundee City
- East Ayrshire
- Inverclyde
- Midlothian
- Moray
- Na h-Eileanan Siar (Western Isles)
- North Ayrshire
- North Lanarkshire
- Orkney Islands
- Perth and Kinross
- Renfrewshire

- East Dunbartonshire
- East Lothian
- East Renfrewshire
- Falkirk
- Fife
- Glasgow
- Highland
- Scottish Borders
- Shetland Islands
- South Ayrshire
- South Lanarkshire
- Stirling
- West Dunbartonshire
- West Lothian
- None of these – CLOSE

Q5. **Who tends to make most decisions about food (e.g. planning, buying, cooking) in your household?**
- I make most / all decisions about food
- I make decisions jointly with someone else in the household
- Someone else in the household makes most / all decisions about food

Q6. **How many adults and children are there in your household? DROP DOWN LIST WITH NUMBERS**
- Adults (16+)
- Children aged under 16yrs

CONTEXTUAL QUESTIONS – HEADING NOT SHOWN

ASK ALL

Q7. **When thinking about buying and preparing food for your household, which of the following are most important to you? Rank from most to least important.** RANDOMISE
- Cost
- The environmental impact of food production and packaging
- Healthy food
- Animal welfare
- Convenience / easy to cook / prepare
- Something everyone will eat
- Supporting local producers / businesses
- Taste
- Filling
- Shelf life / use by dates
- Provenance / where food comes from

Q8. **Thinking about the foods you personally eat and drink (both for meals and snacks), how healthy do you feel these are?**
- Very healthy
- Quite healthy
- Neither healthy nor unhealthy
- Not very healthy
- Not at all healthy

Q9. **How important is it to you personally to have a healthy diet?**
- Very important
- Quite important
- Neither important nor unimportant
- Not very important
- Not at all important

AFFORDABILITY – HEADING NOT SHOWN

Q10. **How concerned are you about your household finances now, and for the next 6-12 months?**

a) now b) next 6-12 months
- Very concerned
- Quite concerned
- Not very concerned

- Not at all concerned
- Unsure

Q11. **How much of a negative impact, if any, is the cost of living situation having on your household finances?**

1=no negative impact ---10=very big negative impact

Q12. **Which, if any, aspects of your life are being negatively affected by the cost of living situation?** RANDOMISE

- Housing/ accommodation (rent / mortgage)
- Food
- Heating / gas / electricity
- Paying bills
- Debt repayment
- Travel (day-to-day)
- Socialising (e.g. eating / drinking out with friends or family)
- Treats (e.g. days out, impulse purchases, cinema, nails, beauty)
- Holidays
- Essential items (e.g. petrol, toiletries, clothing)
- Something else (specify ______________________)
- None

Q13. **Looking at the following list, which of these have you already done because of the cost of living situation, which would you consider doing in future and which would you not consider?**

RANDOMISE	ALREADY DONE THIS	WOULD CONSIDER DOING	WOULD NOT CONSIDER	Not relevant
Take on more paid work				
Get more money through benefits				
Apply for one-off grants/ payments e.g. crisis grant				
Borrow money				
Use up savings				
Reduce spend on treats for me				
Reduce spend on treats for my family				
Reduce home energy use				
Go without essential food items				
Go without other essential items e.g. petrol, toiletries, clothing				

Q14. **To what extent are you worried about being able to afford enough food for yourself and your family in the next month?**

- Very worried
- Quite worried
- Neither worried nor not worried
- Not very worried
- Not at all worried

ASK IF VERY/QUITE WORRIED AND LIVE IN HOUSEHOLDS WITH AT LEAST ONE OTHER PERSON

Q15. **Are other members of your household aware that you are worried about being able to afford food?**

- They are completely aware of the situation
- They know a bit but are not fully aware
- They don’t know anything about it

ASK ALL

Q16. **<u>Thinking specifically about food</u>, which of the following have you already done because of the cost of living situation, which would you consider doing in future and which would you not consider?**

RANDOMISE	ALREADY DONE THIS	WOULD CONSIDER DOING	WOULD NOT CONSIDER	N/A
Skip meals				
Reduce portion sizes				
Swap to cheaper / unbranded products				
Switch cooking methods to save money on energy (e.g. switch from oven to hob; oven/hob to microwave / air fryer etc)				
Stop eating out / eat out less often				
Stop ordering / order fewer takeaways/ deliveries				
Use a foodbank or food pantry				
Consume foods past their use-by date				
Stop buying or buy less fresh fruit/ vegetables				
Eat less meat / fish				
Take a packed lunch from home				
Buy fewer treats e.g. chocolate, crisps, cake, biscuits				
Buy more on promotion (e.g. buy one get one free)				

ASK THOSE WHO HAVE/WOULD CONSIDER SWAPPING TO UNBRANDED PRODUCTS

Q17. **What types of food products have you / would you swap for a cheaper alternative?**
RANDOMISE

- Dairy products (cheese, milk, butter etc)
- Baked goods (bread, rolls, bagels etc)
- Breakfast cereals
- Ready meals
- Tinned vegetables, fruit, soups
- Tinned meat or fish
- Table sauces (e.g. ketchup, mayonnaise, salad dressings)
- Frozen vegetables / fruit
- Frozen meat, chicken or fish
- Biscuits / confectionery (chocolate, sweets)
- Savoury snacks (crisps, nuts etc)
- Soft drinks
- Alcoholic drinks
- Something else (write in ________________________________)

ASK ALL

Q18. **Has the way you do your food shopping changed in any of the following ways as a result of the cost of living situation?**

- Shop locally more
- Shop locally less
- Shop online more
- Shop online less
- Shop on a fixed budget
- Shop more frequently

- Shop less frequently
- Buy more food on promotions
- Buy more food marked down / near the use-by date
- Change to cheaper / better value supermarket / grocery shop
- Another way (write in ___________________________________)
- The way I do my food shopping has not changed

Q19. **Do you feel the cost of living situation is having an impact on how healthy or unhealthy your diet is?**

- My diet is much healthier
- My diet is a little healthier
- My diet is a little less healthy
- My diet is much less healthy
- No impact on the healthiness of my diet

Q20. **Is eating healthy food more or less of a priority for you during the cost of living crisis?**

- More of a priority
- Less of a priority
- No change

EATING OUT OF HOME – HEADING NOT SHOWN SHOW INTRO ON SEPARATE SCREEN

The next set of questions are about eating out. When answering, please think of eating out as including everything from eating in a restaurant, café, fast food outlet, workplace canteen, to buying food to eat on the go from a sandwich shop or convenience store, or ordering takeaways / delivery food.

Q21. **Thinking about buying and eating food when you're not at home, how often <u>in an average month</u> do you:**

a) Eat out on your own or with other adults
b) Order takeaway / delivery food
c) Eat out with children

- More than once a week
- Once a week
- 2-3 times per month
- Once a month
- Less often
- Never

Q22. **What are the main reasons you eat out (including buying food on the go and takeaway/ deliveries)? Please tick all that apply** RANDOMISE

- It's easier than cooking at home
- It's cheaper than cooking at home
- It's tastier than cooking at home
- I don't have time to cook at home
- I'm not very good at cooking
- I don't like cooking
- For a treat
- Large portion sizes
- To spend time with friends / family
- To guarantee there is something everyone will eat
- Habit
- I enjoy it
- For practical reasons when 'on the go'
- Something else (write in ___________________)

ASK UNLESS NEVER AT Q21

Q23. **How easy or difficult is it to find healthy options when….?**

a) Eating out on your own or with other adults
b) Ordering takeaway / delivery food
c) Eating out with children

- Very easy
- Quite easy
- Neither easy nor difficult
- Quite difficult
- Very difficult

Q24. **In which of these situations are you most likely to choose a healthy option? Select all that apply.**

- Eating out in a restaurant / café / fast food outlet on your own or with other adults
- Ordering takeaway / delivery food
- Buying food to go from a sandwich shop / café / convenience store / shop
- Eating out with children
- None of these
-

Q25. **Which of the following would encourage you to choose a healthier option when eating out (including food on the go and takeaway/ deliveries)? Tick all that apply**

- Healthier options being on promotion
- Cheaper prices for healthy options
- Calories shown on menus
- Knowing the healthy option was more sustainable
- Knowing which options were healthier
- If healthier options were more appealing
- Something else (write in ___________________)
- None of these

Q26. **Which of the following types of information do you think should be available on menus when eating out (including food on the go and takeaway/ deliveries)? Tick all that apply.**

- Calories in food
- Calories in alcoholic drinks
- Calories in soft drinks
- Full nutritional information (e.g. amount of fat, protein, carbohydrate, salt) of food
- Average daily recommended calorie intake for men and women
- None of these

Q27. **Have you noticed calories being shown on menus when eating out (including food on the go and takeaway/ deliveries) recently?**

- Yes, on many menus
- Yes, on a few menus
- No
- Unsure

IF YES AT Q28

Q28. **What impact, if any, has calories being shown on menus had on you when eating out (including food on the go and takeaway/ deliveries)?**

- Make me think more about the food I order
- Encourage me to choose foods with lower calories
- Encourage me to choose foods with higher calories
- No impact
- Another impact (specify ___________________)

IF NO / UNSURE AT Q28

Q29. **What impact, if any, will calories being shown on menus have on you when eating out (including food on the go and takeaway/ deliveries)?**

- Make me think more about the food I order
- Encourage me to choose foods with lower calories
- Encourage me to choose foods with higher calories
- No impact
- Unsure
- Another impact (specify ___________________)

ASK ALL

Q30. **To what extent do you agree or disagree with the following statements?**

RANDOMISE	Agree strongly	Agree slightly	Neither agree nor disagree	Disagree slightly	Disagree strongly
Food businesses have a responsibility to encourage people to eat more healthily					
When eating out it's important for me that locally sourced food is available					
Calories should be shown on all foods that can be bought when eating out					
Children's menus should be healthier					
I would be more likely to choose a food establishment that offered healthier choices					
Food establishments should offer the option of smaller portion sizes					
I'd rather cut back on other spending than stop ordering takeaway/ delivery food					

Q31. **Thinking now specifically about takeaway / delivery foods, do you order online via websites, or apps like Just Eat, Deliveroo or Uber Eats?**

- Yes, always
- Yes, sometimes
- No – SKIP TO SUSTAINABILITY SECTION

IF YES

Q32. **Which of the following types of meal do you tend to order online via websites or apps? Select all that apply.**

- Breakfast
- Lunch
- Dinner
- Snacks during the day or in the evening, including desserts

Q33. **Do you tend to order online via websites or apps when you are with family / friends or when you are on your own?**

- With family / friends
- On my own
- Both

Q34. **To what extent do you agree or disagree with the following statements about ordering takeaway food using websites or apps?**

RANDOMISE	Agree strongly	Agree slightly	Neither agree nor disagree	Disagree slightly	Disagree strongly
It's so easy to order using an app, I probably order more often than I otherwise would					
I have noticed calories being shown when ordering online via a website or app					
If I get a notification with a promotional offer, I often order something, even if I didn't plan to					
It's so convenient to be able to order food from my phone wherever I am					

Q35. **Which, if any, of the following promotional offers from takeaway/ delivery food websites and apps do you tend to use?**

- Discount if you spend a certain amount (e.g. loyalty scheme)
- Meal deals
- Free item if you order certain foods
- Unlimited free delivery with a subscription
- Discount after a certain number of orders
- Emails / texts with discount codes
- Another type of offer (specify ______________________)
- None of these

Q36. **And which of these is most likely to encourage you to order takeaway/ delivery food when you hadn't planned to, or order more food than you had planned?**

- Discount if you spend a certain amount (e.g. loyalty scheme)
- Meal deals
- Free item if you order certain foods
- Unlimited free delivery with a subscription
- Discount after a certain number of orders
- Emails / texts with discount codes
- None of these

SUSTAINABILITY – HEADING NOT SHOWN

ASK ALL

Q37. **How important is it to you that the food you eat is produced and packaged in a sustainable way that minimises the environmental impact?**

- Very important
- Quite important
- Neither important nor unimportant
- Not very important
- Not at all important

Q38. **How well informed do you feel about how to make sustainable food choices when:**

- **a) buying food to cook or prepare at home**
- **b) buying food to eat out of home (from restaurants, cafes, takeaways, sandwich shops)?**
- Very well informed
- Quite well informed
- Neither informed nor uninformed
- Not very well informed
- Not at all well informed

Q39. **Where do you look for information about sustainability in relation to food?**

- Nowhere – I do not look for information about this topic
- Online search (e.g. Google)
- Online food/recipe websites (e.g. jamieoliver.com, BBC Good Food, delicious)
- Government / local authority websites
- Specialist environmental websites
- Newspapers/ magazines
- Supermarkets/ shops
- Friends / family
- On food labels
- Somewhere else (write in ________________________________)

Q40. **In general how often, if ever, do you do each of the following?**

RANDOMISE	Never	Occasion-ally	Most of the time	Always	Don't know/ it varies
Actively try to reduce my food waste					
Compost / recycle food waste					
Buy food and drink produced locally					
Buy fruit and veg that is in season					
Actively reduce my meat consumption					
Actively reduce my consumption of dairy products (e.g. milk, cheese, yoghurt)					
Adopt a vegan / plant based diet					
Buy food with less packaging or sustainable packaging					
Drink tap water rather than bottled water					

Q41. **Which of the following would encourage you to choose more sustainable options when buying food? Tick all that apply**

- Sustainable foods being on promotion
- Cheaper prices for foods that are more sustainable
- Sustainability rating on labels / menus – showing how sustainable foods are
- Knowing the sustainable option is more healthy
- Knowing which options are more sustainable
- Something else (write in ___________________)
- None of these

Q42. **How important is it to you that the food you buy and eat is ethically sourced (giving consideration to animals, the environment, and people)?**

- Very important
- Quite important
- Neither important nor unimportant
- Not very important
- Not at all important

Q43. **Which best describes your diet?**

SINGLE CODE

- No particular diet (eat most things including meat, fish, dairy)
- Pescatarian (eat fish but not meat)
- Vegetarian (eat dairy / eggs, but not meat or fish)
- Vegan (do not consume any animal products like fish, dairy, eggs, honey)

- Actively reducing amount of meat, dairy or animal products consumed
- Exclude certain foods/ ingredients due to allergy/ intolerance (e.g. gluten, lactose, nuts)
- Exclude certain foods/ ingredients for religious or cultural reasons
- Exclude certain foods/ ingredients for medical reasons (e.g. diabetes)
- Other (WRITE IN)
- Don't know
- Prefer not to answer

And finally, a few questions about you. Remember all answers you give are completely confidential.

Q44. **What is your ethnic group?** SINGLE CODE

White
- Scottish
- Other British
- Irish
- Gypsy/Traveller
- Polish
- Any other White ethnic group

Mixed or Multiple ethnic groups
- Any Mixed or Multiple ethnic groups

Asian, Asian Scottish or Asian British
- Pakistani, Pakistani Scottish or Pakistani British
- Indian, Indian Scottish or Indian British
- Bangladeshi, Bangladeshi Scottish or Bangladeshi British
- Chinese, Chinese Scottish or Chinese British
- Any other Asian

African
- African, African Scottish or African British
- Any other African

Caribbean or Black
- Caribbean, Caribbean Scottish or Caribbean British
- Black, Black Scottish or Black British
- Any other Caribbean or Black

Other ethnic group
- Arab, Arab Scottish or Arab British
- Any other ethnic group

- Prefer not to answer

Q45. **Which of these best describes your working status? (Please tick one box only)**
- In paid full-time employment (30+ hours per week)
- In paid part-time employment (less than 30 hours per week)
- Self-employed full time (30+ hours per week)
- Self-employed part-time (less than 30 hours per week)
- Unemployed
- Retired from paid work altogether
- On maternity/paternity leave
- Looking after family or home
- Full-time student/ at school
- Long term sick or disabled
- Unable to work because of short-term illness or injury
- On a government training scheme
- Something else (please write in) ______________
- Prefer not to answer

ASK IF SELF EMPLOYED / FULL TIME OR PART TIME EMPLOYED

Q46. **Where do you currently work?**

- At home
- Out of the home
- A mix of at home and out of home

ASK ALL

Q47. **What is the highest level of qualification you have achieved?**

- No qualifications
- Level 1: O Grade, Standard Grade, Access 3 Cluster, Intermediate 1 or 2, GCSE, CSE, Senior Certificate or equivalent; GSVQ Foundation or Intermediate, SVQ level 1 or 2, SCOTVEC Module, City and Guilds Craft or equivalent; Other school qualifications
- Level 2: SCE Higher Grade, Higher, Advanced Higher, CSYS, A Level, AS Level, Advanced Senior Certificate or equivalent; GSVQ Advanced, SVQ level 3, ONC, OND, SCOTVEC National Diploma, City and Guilds Advanced Craft or equivalent
- Level 3: HNC, HND, SVQ level 4 or equivalent; Other post-school but pre-Higher Education qualifications
- Level 4 and above: Degree, Postgraduate qualifications, Masters, PhD, SVQ level 5 or equivalent; Professional qualifications (for example, teaching, nursing, accountancy); Other Higher Education qualifications
- Prefer not to answer

Q48. **Do you have a physical or mental health condition or illness lasting or expected to last 12 months or more?**

- Yes
- No
- Prefer not to answer

IF YES

Q49. **Does your condition or illness reduce your ability to carry-out day-to-day activities?**

- Yes, a lot
- Yes, a little
- Not at all
- Prefer not to answer

Q50. **Please type in your full postcode. This is for analysis purposes only and will not be used to identify you personally.**

____

THANK & CLOSE

Contact details:

Louise Fraser

Jump Research

louise.fraser@jumpresearch.co.uk

the research consortium