Food in Scotland Consumer Tracking Survey Wave 8 – Diet & Nutrition

Summary Report
1. Introduction

- The Food in Scotland Consumer Tracking Survey monitors attitudes, knowledge and reported behaviours relating to food amongst a representative sample of Scotland’s population, identifying changes over time.
- Established by Food Standards Scotland (FSS) in 2015, the survey is undertaken bi-annually.
- The questionnaire was designed around FSS’ six strategic priorities:
  - Food is Safe
  - Food is Authentic
  - Consumers Have Healthier Diets
  - Responsible Food Businesses Flourish
  - FSS is a Trusted Organisation
  - FSS is Efficient and Effective
- Each research wave comprises:
  - a set of core questions, replicated at each wave;
  - a key question module focusing on either food safety and authenticity, or diet and nutrition;
  - and a topical question module.
- The survey was set up by Kantar TNS who conducted Waves 1 – 6. JRS research consortium undertook the two most recent waves.
- This document outlines key findings from Wave 8 (Diet and Nutrition).

2. Methodology

- The research methodology was designed to be consistent with previous waves to ensure comparability.
- Online survey
- Representative sample of 1,069 Scottish adults
- 30mins questionnaire length
- 9th – 19th July 2019

- Where statistically significant differences exist compared with the previous wave, these are highlighted using arrows 🔺🔻
- All research was undertaken in strict accordance with MRS Code of Conduct and GDPR legislation.
3. Key Findings
• 6 in 10 Scots are aware of FSS - A level of awareness that has been consistently maintained over the past few years
• Awareness has grown particularly amongst younger age groups (16-44yrs)
• FSS is trusted by more than three-quarters of those aware of the organisation, to do its job
• And performance is rated highly – with many measures recording their highest levels of endorsement since tracking began
• Whilst most are aware of FSS’ responsibilities relating to food safety, over time there is evidence that growth in understanding the organisation’s broader remit (i.e. healthy eating) has not grown at the same rate as overall awareness
• Younger age groups (who are more likely to be aware of the organisation) have a less broad knowledge of FSS’ remit.

Healthy Eating

• The majority of consumers are concerned about unhealthy diets in Scotland, and acknowledge that action is needed to improve these
• However, 6 in 10 think their own diet and their household’s diet is healthy, suggesting a lack of personal association
• And whilst most consider key principles of healthy eating important, there is a clear gap in adherence to these
• Consumers agree that eating healthy food makes them feel good, but key barriers – time and cost – remain prevalent, and show no change over time
• Consumers think they have the information about healthy eating that they need
  • and whilst that is partly true, knowledge of the detail of recommended calories / sugar content is poor
• Several of the measures around attitudes to diet and nutrition show a slight shift away from being regarded as ‘very’ important / concerning, suggesting healthy eating is perhaps not as high on the public agenda as before
• Eating out of home remains more unhealthy, with younger age groups and females finding it most difficult to eat healthily out of home.
Consumers acknowledge that obesity and Type 2 Diabetes (T2D) are serious issues, and understand the negative consequences of obesity on health.

Eating too much and doing too little exercise are viewed as the key contributing factors to being overweight.

However, consumers recognise the range of retail and out of home promotions have an impact on their purchase decisions, and believe food businesses have a role to play in not encouraging unhealthy food purchases.

And many support restrictions on in-store marketing for unhealthy drinks and snacks.

Levels of support for regulation differ across the potential options – limiting sugar/salt/fat content in foods was the most popular measure.

However, there is evidence of increasing numbers being strongly against regulation – particularly relating to ‘bans’ on unhealthy foods.

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However, there is evidence of increasing numbers being strongly against regulation – particularly relating to ‘bans’ on unhealthy foods.

1 in 10 households in Scotland contain at least one person with a food allergy.

Not surprisingly, allergens are a key concern for this audience; less so for the general public, although they do understand the potential severity of food allergies.

Most believe they have access to clear information about ingredients that can cause allergic reactions.

Two-thirds consider it easy to find information about allergies when buying food in supermarkets – generally via food labels.

However finding allergy information when eating out of home is much more difficult.

Those with food allergies tend to let a waiter/waitress know that they have an allergy when eating out, but more could be encouraged to do so, particularly at takeaway/sandwich shops.

Overall there is little evidence of stigma around food allergies, although young people (aged 12-18yrs) are less comfortable discussing their food allergies with friends.
4. FSS Awareness, Knowledge & Trust

This question set is designed to measure performance on the following strategic priorities:

→ FSS is a trusted organisation
→ FSS is efficient and effective

This section also seeks to understand the wider context in which FSS is operating - looking at issues causing concern for consumers.
More than 6 in 10 Scottish consumers are aware of Food Standards Scotland, and three-quarters of them trust the organisation to do its job.

63% are aware of FSS

Levels of Trust in FSS

- I trust it a lot: 23%
- I trust it: 54%
- I neither trust it nor distrust it: 20%
- I distrust it: 1%
- I distrust it a lot: 0%
- Don't know: 2%

77% Trust FSS

Increase v 73% Wave 7
Over time, awareness of FSS has grown significantly but has stabilised at around 60%. Levels of trust have remained high.

Q7 In Scotland, 'Food Standards Scotland' has replaced 'Food Standards Agency' as the organisation responsible for making sure people eat healthily and safely. Had you heard of Food Standards Scotland before today? Base: All respondents W8 1069

Q9 How much do you trust or distrust Food Standards Scotland to do its job? Base: Those aware of FSS W8 669

Previous base sizes:
W1 (1003); W2 (1000); W3 (1000); W4 (1000); W5 (1000); W6 (1002); W7 (1046)
Ensuring food is safe to eat is the most recognised part of FSS’ remit. Consumers are also aware of FSS’ responsibilities in working with food businesses, however aspects relating to food labelling and healthy eating are less well known.

<table>
<thead>
<tr>
<th>Issue</th>
<th>Awareness Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ensuring the food you buy is safe to eat</td>
<td>71%</td>
</tr>
<tr>
<td>Promoting food safety in the home</td>
<td>53%</td>
</tr>
<tr>
<td>Date labels, such as “best before” and “use by” labels</td>
<td>54%</td>
</tr>
<tr>
<td>Allergen labelling on all food packaging</td>
<td>52%</td>
</tr>
<tr>
<td>Food authenticity – i.e. food is what it says it is on the packaging</td>
<td>62%</td>
</tr>
<tr>
<td>Country of origin labels, which identify where food comes from</td>
<td>49%</td>
</tr>
<tr>
<td>Nutrition labelling information on food packaging</td>
<td>51%</td>
</tr>
<tr>
<td>Promoting and enabling healthy eating</td>
<td>46%</td>
</tr>
<tr>
<td>Working with the food industry and business to improve standards</td>
<td>66%</td>
</tr>
<tr>
<td>Overseeing inspections of restaurants and other food businesses for food hygiene</td>
<td>62%</td>
</tr>
<tr>
<td>Ensuring food is sustainable - such as reducing green house emissions and reducing waste when producing food</td>
<td>34%</td>
</tr>
</tbody>
</table>

- Those in youngest age group (16-34yrs) are less likely to be aware of many of the areas of responsibility – other than healthy eating and labelling.
FSS' performance is highly rated across all measures, particularly those relating to food safety. Many aspects show a significant uplift compared with the previous research wave in December 2018, including relating to healthy eating.

Q10 How do you rate Food Standards Scotland in terms of? Base: Those aware of FSS W7 630, W8 669

% rating ‘Excellent’ or ‘Very good’ or ‘Good’

- Ensuring that food in Scotland is safe to eat: 85% (Wave 8), 81% (Wave 7)
- Being the experts when it comes to food safety: 85% (Wave 8), 80% (Wave 7)
- Providing useful food safety advice: 83% (Wave 8), 77% (Wave 7)
- Working in the best interests of Scotland and people who live here: 83% (Wave 8), 77% (Wave 7)
- Having the necessary expertise to help people in Scotland eat healthily: 80% (Wave 8), 74% (Wave 7)
- Taking action when needed to protect consumers: 79% (Wave 8), 75% (Wave 7)
- Helping people to understand food labels and what’s in their food: 79% (Wave 8), 72% (Wave 7)
- Being an organisation which responds quickly to problems related to food: 78% (Wave 8), 74% (Wave 7)
- Providing the right advice about food and nutrition related issues which affect you: 78% (Wave 8), 74% (Wave 7)
- Speaking to people in a way that's friendly and understandable: 74% (Wave 8), 71% (Wave 7)
- Being a dynamic and forward-looking organisation: 73% (Wave 8), 68% (Wave 7)

Denotes significant difference vs previous wave (95% confidence level)
Consumers are concerned about a wide range of food-related topics. Food production, authenticity and safety are key areas of concern, and levels of concern have increased since the December research wave.

Top 10 areas of concern

<table>
<thead>
<tr>
<th>Issue</th>
<th>% saying ‘causes concern’</th>
</tr>
</thead>
<tbody>
<tr>
<td>The use of pesticides, hormones, steroids, antibiotics in growing, producing food</td>
<td>84%</td>
</tr>
<tr>
<td>Animal welfare</td>
<td>84%</td>
</tr>
<tr>
<td>Food poisoning</td>
<td>81%</td>
</tr>
<tr>
<td>Food not being what the label says it is</td>
<td>75%</td>
</tr>
<tr>
<td>Food prices</td>
<td>68%</td>
</tr>
<tr>
<td>Food safety when eating out</td>
<td>67%</td>
</tr>
<tr>
<td>The use of additives (such as preservatives and colouring) in food products</td>
<td>67%</td>
</tr>
<tr>
<td>Impact of food production on the environment (e.g. carbon emissions, water scarcity)</td>
<td>66%</td>
</tr>
<tr>
<td>The feed given to livestock</td>
<td>66%</td>
</tr>
<tr>
<td>Genetically Modified (GM) foods</td>
<td>57%</td>
</tr>
</tbody>
</table>

Vs Wave 7

- The use of pesticides, hormones, steroids, antibiotics in growing, producing food: ↑ 75%
- Animal welfare: ↑ 75%
- Food poisoning: ↑ 69%
- Food not being what the label says it is: ↑ 70%
- Food prices: ↓ 76%
- Food safety when eating out: 70%
- The use of additives (such as preservatives and colouring) in food products: ↑ 62%
- Impact of food production on the environment (e.g. carbon emissions, water scarcity): 65%
- The feed given to livestock: ↑ 57%
- Genetically Modified (GM) foods: 57%

• Females and those with children are more likely to be concerned across a range of issues.
A range of other areas relating to food are of some concern to consumers, albeit at a lower level.

<table>
<thead>
<tr>
<th>Other areas of concern</th>
<th>% saying ‘causes concern’</th>
<th>Vs Wave 7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allergens – things in food that can cause allergic reactions</td>
<td>54%</td>
<td>↑ 46%</td>
</tr>
<tr>
<td>People having an unhealthy diet</td>
<td>52%</td>
<td>↓ 59%</td>
</tr>
<tr>
<td>Possibility of food supply shortages</td>
<td>47%</td>
<td>48%</td>
</tr>
<tr>
<td>Being encouraged to ‘upsize’ to bigger portions or add sides and extras when I’m out</td>
<td>39%</td>
<td>N/A</td>
</tr>
<tr>
<td>Food safety at home</td>
<td>37%</td>
<td>39%</td>
</tr>
<tr>
<td>Understanding the difference between date labels, such as “best before” and “use by” labels</td>
<td>30%</td>
<td>30%</td>
</tr>
</tbody>
</table>

- Allergens are a particular concern for 85% of those with food allergies
- 16-34 year olds and females are more concerned about unhealthy diets
- Those with kids are more likely to be concerned about upsizing.
Almost half of consumers were aware of advertising on food issues. Upsizing was the most widely recalled, by around a quarter, significantly more than at Wave 7.

### Aware of Advertising on Food Issues

<table>
<thead>
<tr>
<th>Issue</th>
<th>Awareness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saying no to 'upsizing' of food and drink when eating out</td>
<td>24%</td>
</tr>
<tr>
<td>Food allergies</td>
<td>18%</td>
</tr>
<tr>
<td>Food poisoning from chicken</td>
<td>17%</td>
</tr>
<tr>
<td>How to eat more healthily when you’re eating out</td>
<td>14%</td>
</tr>
<tr>
<td>Food safety when preparing and cooking food at home</td>
<td>13%</td>
</tr>
<tr>
<td>Preventing food poisoning</td>
<td>12%</td>
</tr>
<tr>
<td>Not seen/heard any advertising about food issues</td>
<td>54%</td>
</tr>
</tbody>
</table>

Note: Not designed to track ad awareness. Total awareness figure not directly comparable with previous waves.

Q14 Have you seen or heard any advertising or publicity recently about any of the following food issues? Base: All respondents W7 1046, W8 1069
4 in 10 consumers recognise the Eatwell Guide, consistent with summer 2018. Medical centres, schools and online were key locations for driving awareness.

40% have seen the Eatwell Guide

Wave 6 = 40%
5. Healthy Eating

This question set is designed to deliver insight and track changes for the following strategic objective:

→ Consumers Have Healthier Diets

This section focuses on consumer attitudes, knowledge and current behaviour with regards to healthy eating.
There is widespread concern about unhealthy eating in Scotland and acknowledgement that significant diet changes are required to improve the nation’s health.

In Scotland we have to make significant changes to what we eat to be healthier
- Percentage agree: 72%
  - 79% W6

There are too many people who eat unhealthily in Scotland
- Percentage agree: 72%

Concerned about people having an unhealthy diet
- Percentage concerned: 52%
  - 59% W6
6 in 10 Scots consider their own diet to be healthy, and a similar proportion say others in their household have a healthy diet. A significant minority were reducing the amount of sugar or salt in their diet.

60% say the kinds of food they eat are very / quite healthy

57% say the kinds of food others in their household eat are very / quite healthy

66% of consumers said they were modifying their diet in some way.

30% Reducing amount of sugar

25% Reducing amount of salt
In terms of healthy diet practices, drinking water is the most ingrained habit, with almost two-thirds of consumers claiming to do this, in contrast with less than half achieving 5 a day.

**Drink at least 6 to 8 cups or glasses of fluid every day (for example water, tea or coffee, etc.)**

- Always or nearly always: 33%
- Mostly: 30%
- Sometimes: 23%
- Rarely: 10%
- Never: 3%

**Look at the front of pack traffic lights, or colour coded labelling which shows how many calories, sugar, salt and saturated fats are in package foods**

- Always or nearly always: 19%
- Mostly: 26%
- Sometimes: 29%
- Rarely: 17%
- Never: 8%

**Eat at least 5 portions of a variety of fruit and vegetables each day**

- Always or nearly always: 16%
- Mostly: 29%
- Sometimes: 33%
- Rarely: 16%
- Never: 5%

Wave 8 = bold colours
Wave 6 = shadow
Whilst the majority of Scots consider it important to eat 5 a day, restrict consumption of unhealthy foods and check on-pack nutrition information, fewer think these are ‘very’ important than before, rather saying they are ‘quite’ important.

Eat at least 5 portions of a variety of fruit and vegetables each day

Only having foods that are high in fat, salt or sugars (e.g. confectionery, biscuits, cakes) occasionally and in small amounts

Look at the front of the pack traffic light, or colour coded labelling which shows how many calories, sugar, salt and saturated fats are in package foods
The clear gap between attitudes and behaviours is evident, particularly with regards to eating 5 portions of fruit / vegetables every day.

<table>
<thead>
<tr>
<th>Statement</th>
<th>ATTITUDE</th>
<th>BEHAVIOUR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eat at least 5 portions of a variety of fruit and vegetables each day</td>
<td>82%</td>
<td>45%</td>
</tr>
<tr>
<td>Only having foods that are high in fat, salt or sugars (e.g. confectionery,</td>
<td>72%</td>
<td>n/a</td>
</tr>
<tr>
<td>biscuits, cakes) occasionally and in small amounts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Look at the front of the pack traffic light, or colour coded labelling</td>
<td>71%</td>
<td>45%</td>
</tr>
<tr>
<td>which shows how many calories, sugar, salt and saturated fats are in</td>
<td></td>
<td></td>
</tr>
<tr>
<td>package foods</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Drink at least 6 to 8 cups or glasses of fluid every day (for example</td>
<td>n/a</td>
<td>63%</td>
</tr>
<tr>
<td>water, tea or coffee, etc.)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
9 in 10 consumers are concerned about the amount of sugar in food. Saturated fat, fat and salt are also causes for concern. Latest data shows a slight shift away from being concerned a lot, to being concerned a little.

Q17 Please indicate how much each of these concerns you? Base: W6 1002, W8 1069

- **The amount of sugar in food**
  - Wave 8: 10% A lot, 45% A little, 52% Not at all
  - Wave 6: 11% A lot, 39% A little, 52% Not at all
- **The amount of saturated fat in food**
  - Wave 8: 12% A lot, 38% A little, 50% Not at all
  - Wave 6: 9% A lot, 50% A little, 48% Not at all
- **The amount of fat in food**
  - Wave 8: 13% A lot, 34% A little, 53% Not at all
  - Wave 6: 11% A lot, 42% A little, 47% Not at all
- **The amount of salt in food**
  - Wave 8: 15% A lot, 34% A little, 51% Not at all
  - Wave 6: 11% A lot, 42% A little, 47% Not at all
Whilst two-thirds of Scots agree that eating healthy food makes them feel good about themselves, almost half acknowledge that they eat too many sweet treats. Fewer signal intention to change their behaviour at this wave.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Wave 6</th>
<th>Wave 8</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eating healthy food makes me feel good about myself</td>
<td>52%</td>
<td>66%</td>
<td>↓ 14%</td>
</tr>
<tr>
<td>I know I need to do something to eat more healthily</td>
<td>45%</td>
<td>49%</td>
<td>↓ 4%</td>
</tr>
<tr>
<td>Eating things like cakes, biscuits, chocolates or sweets makes me feel good</td>
<td>44%</td>
<td>46%</td>
<td>↓ 2%</td>
</tr>
<tr>
<td>I know I eat too many 'treats' like cakes, biscuits, chocolates or sweets every day</td>
<td>44%</td>
<td>46%</td>
<td>↓ 2%</td>
</tr>
<tr>
<td>I tend to eat more unhealthily at home than when eating out</td>
<td>21%</td>
<td>28%</td>
<td>↓ 7%</td>
</tr>
<tr>
<td>As long as you take enough exercise you can eat whatever you want</td>
<td>22%</td>
<td>24%</td>
<td>↓ 2%</td>
</tr>
<tr>
<td>I often go large, buy meal deals and add extras and sides when I’m eating out</td>
<td>19%</td>
<td>23%</td>
<td>↓ 4%</td>
</tr>
</tbody>
</table>

Q18 How much do you agree or disagree with each of these statements? Base: W6 1002, W8 1069
Three-quarters of parents say their own children are a healthy weight but think others are not. Whilst understanding the basic principles of healthy eating for kids, just under half are worried about the type of food their kids eat.

- **I think my children are a healthy weight for their age and height**: 73% agree
- **I think there are too many children who are not a healthy weight for their age and height**: 72% agree, 77% disagree
- **Children should avoid sugary drinks such as colas or lemonades**: 79% agree
- **I’m worried about the types of food my child(ren) is/are eating**: 46% agree, 55% disagree
- **It’s OK to reward children with chocolate, sweets and biscuits**: 26% agree, 29% disagree
Barriers to healthy eating are acknowledged as relating to cost and time, with only a quarter believing healthy eating isn’t appealing. Younger age groups are more likely than others to cite barriers.

Q21 How much do you agree or disagree with the following statements that other people have made? Base: W6 1002, W8 1069

- Healthy eating is too expensive: 48% agree, 49% disagree
- Most people lack time to make healthy meals: 41% agree, 45% disagree
- Healthy eating isn’t appealing: 24% agree, 25% disagree
Consumers increasingly believe they have clear information on healthy balanced diets, however a significant minority admit they get confused about what is healthy and what isn’t, and many feel expert advice can be contradictory.

93% say they have clear information on eating a healthy balanced diet

Wave 7 = 88%

Q18 How much do you agree or disagree with each of these statements? Base: W6 1002, W8 1069

Q13 Do you have clear information on...? Base: All respondents W8 1069

% agree

- The experts contradict each other over what foods are good or bad for you
  - Wave 8: 60%
  - Wave 6: 67%

- I get confused over what’s supposed to be healthy and what isn’t
  - Wave 7 = 88%
  - Wave 6: 36%
  - Wave 8: 30%
A third of Scots know the correct recommended calorie intake for males and females, consistent with previous waves. Most tend to underestimate.
Most Scottish adults exhibit a good understanding of the key principles of a healthy diet, consistent with previous waves. Further guidance around fruit juice may be useful.

Q21 How much do you agree or disagree with the following statements that other people have made? Base: W6 1002, W8 1069

<table>
<thead>
<tr>
<th>Statement</th>
<th>% agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beans and fruit and vegetables are all good sources of fibre</td>
<td>88%</td>
</tr>
<tr>
<td>Alcoholic drinks can be high in calories</td>
<td>86%</td>
</tr>
<tr>
<td>Too much salt can raise your blood pressure</td>
<td>84%</td>
</tr>
<tr>
<td>Too much sugar can lead to obesity</td>
<td>86%</td>
</tr>
<tr>
<td>Too much fat can lead to obesity</td>
<td>82%</td>
</tr>
<tr>
<td>Snacks, such as biscuits, cakes, confectionery and savoury snacks between meals should only be eaten occasionally and in small amounts</td>
<td>83%</td>
</tr>
<tr>
<td>I should avoid sugary drinks such as colas or lemonade</td>
<td>83%</td>
</tr>
<tr>
<td>I should only have fruit juice in small amounts</td>
<td>82%</td>
</tr>
<tr>
<td>You should cut out bread, pasta, rice and potatoes to avoid gaining weight</td>
<td>31%</td>
</tr>
</tbody>
</table>
More than half of those who drink alcohol never think about the calorie content. Males are significantly more likely than females to never think of the calories when drinking alcohol.

Q25 If you drink alcoholic drinks, are you aware of how many calories are in them? Base: W6 1002, W8 1069; W8 males 438, W8 females 631

- Yes – every time I drink them
  - Wave 6: 8% (9%)
  - Wave 8: 26% (27%)
  - Females: 9% (8%)
  - Males: 21% (21%)

- Yes – some of the time when I drink them
  - Wave 6: 22% (27%)
  - Wave 8: 42% (40%)
  - Females: 29% (35%)
  - Males: 21% (25%)

- No – never think of the calories when I drink them
  - Wave 6: 22% (27%)
  - Wave 8: 51% (51%)
  - Females: 35% (51%)
  - Males: 21% (25%)

- I don't drink alcoholic drinks
  - Wave 6: 8% (18%)
  - Wave 8: 29% (29%)
  - Females: 25% (25%)
  - Males: 18% (18%)

- Don't know
  - Wave 6: 2% (2%)
  - Wave 8: 3% (3%)
  - Females: 2% (2%)
  - Males: 2% (2%)
Very few consumers are able to correctly estimate the amount of sugar in soft drinks. No consumers were able to give the correct amount of sugar in sports drinks or fruit smoothies.

Q22 We are now going to show you some types of soft drinks. For each one please type in how much sugar you think it contains. You may answer using grams or teaspoons.

Base: W6 1002, W8 1069
The average amount of sugar that consumers ‘guess’ is in drinks, is significantly higher for soft and sports drinks.

Average estimated amount of sugar in soft drinks (grams)

- **Soft drink**
  - Correct: 35
  - W8: 55
  - W6: 50

- **Sports drink**
  - Correct: 18
  - W8: 46
  - W6: 36

- **Orange juice**
  - Correct: 30
  - W8: 25
  - W6: 30

- **Diet drink**
  - Correct: 0
  - W8: 18
  - W6: 20

- **Fruit smoothie**
  - Correct: 28
  - W8: 29
  - W6: 30

- **Energy drink**
  - Correct: 55
  - W8: 65
  - W6: 55

Q22 We are now going to show you some types of soft drinks. For each one please type in how much sugar you think it contains. You may answer using grams or teaspoons.

Base: W6 1002, W8 1069
Two thirds of Scots think it is easy for them to eat healthily out of home, a significant increase over the past year. Younger age groups and females find it most difficult.

Q28 How easy or difficult is it for you to eat healthily outside the home? Base: W6 1002, W8 1069

- Very easy, 16%
- Quite easy, 50%
- Quite difficult, 29%
- Very difficult, 4%

% Easy
- W8 66%
- W6 59%
Half of Scots had at least one takeaway per month in the last quarter, often using a home delivery service. Data remains consistent with summer 2018.

### Frequency of takeaway/home delivery in past 3 months

- **More than once a week**: Wave 8 - 4%, Wave 6 - 5%
- **Once a week**: Wave 8 - 12%, Wave 6 - 13%
- **2-3 times per month**: Wave 8 - 17%, Wave 6 - 18%
- **Once a month**: Wave 8 - 15%, Wave 6 - 17%
- **Less than once a month**: Wave 8 - 23%, Wave 6 - 20%
- **Haven't had a takeaway in the past 3 months**: Wave 8 - 30%, Wave 6 - 27%

### How often takeaway/home delivery came from ordering / delivery service e.g. Deliveroo, UberEats, Just Eat

<table>
<thead>
<tr>
<th></th>
<th>Wave 8</th>
<th>Wave 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>At least once in past 3 months</td>
<td>58%</td>
<td>53%</td>
</tr>
<tr>
<td>1+ per month</td>
<td>42%</td>
<td>40%</td>
</tr>
<tr>
<td>1+ per week</td>
<td>15%</td>
<td>14%</td>
</tr>
</tbody>
</table>

**SUMMARY**

- **In past 3 months**: Wave 8 - 70%, Wave 6 - 73%
- **1+ per month**: Wave 8 - 48%, Wave 6 - 53%
- **1+ per week**: Wave 8 - 16%, Wave 6 - 18%
Although most reported their takeaway habits were no different in the previous 6 months, there is some evidence that numbers having home deliveries from fast food restaurants and delivery services is reducing.
Whilst most have not changed their cooking/eating habits in the previous 6 months, around a third have cooked or eaten at home more often, and around a quarter have bought fewer snacks / treats. Data is consistent with Wave 6.

Q58 Looking at the list below, please indicate whether you have done each of these more or less in the last 6 months, or whether you have not changed these. Base: W6 1002, W8 1069. Why have you made this change?
6. Encouraging Healthier Diets

This question set is also designed to deliver insight on the following strategic objective:

➔ Consumers Have Healthier Diets

However, this section focuses more on consumer understanding of the consequences of unhealthy diets, and attitudes towards potential measures to encourage healthier diets.
Consumers are aware of the potential negative consequences of obesity on their health.

Q31 How serious a problem do you think obesity is in Scotland today? Base: W6 1002, W8 1069
Q32 Do you believe there is a definite link between obesity and the likelihood of getting some types of cancer? Base: W8 1069
Q33 And how serious a problem do you think type 2 diabetes is in Scotland today? Base: W6 1002, W8 1069
Consumers strongly link weight gain to eating too much and doing too little exercise. Less certainty exists around metabolism and genetics.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Wave 8 % agree</th>
<th>Wave 6 % agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Most people who are overweight have put on weight because they eat too much</td>
<td>36%</td>
<td>72%</td>
</tr>
<tr>
<td>Most people who are overweight have put on weight because they do too little exercise</td>
<td>31%</td>
<td>74%</td>
</tr>
<tr>
<td>Most overweight people have put on weight because of a low metabolism</td>
<td>4%</td>
<td>13%</td>
</tr>
<tr>
<td>Being overweight is something you inherit from your parents</td>
<td>3%</td>
<td>16%</td>
</tr>
</tbody>
</table>

- **Strongly agree**
- **Agree**
- **Neither**
- **Disagree**
- **Strongly disagree**
- **Don’t know**

Q34 Please indicate how much you agree or disagree with the following statements…Base: W6 1002, W8 1069
Whilst consumers believe out of home and retail establishments should play their part, they do not abdicate all responsibility for healthy diets.

- I don’t think restaurants, coffee shops and takeaways should encourage us to ‘upsize’
  - Wave 8: 64%
  - Wave 6: 65%

- It worries me that unhealthy foods seem to be on price promotion more often than healthy ones
  - Wave 8: 63%
  - Wave 6: 69%

- It’s not up to me, it’s up to others such as supermarkets / food manufacturers / the government to make the food we buy healthier
  - Wave 8: 26%
  - Wave 6: 28%

Q18 How much do you agree or disagree with each of these statements? Base: W6 1002, W8 1069
Consumers admit to being influenced by a range of retailer promotions, particularly multi-buy, extra free and price drops. Aisle end displays, upsizing offers and celebrity characters are less influential than in 2018.

Q40 How much do you agree or disagree that each of the following have led you to buy on impulse unhealthy food/drink for your self or others, beyond what you had planned?

Base: W6 1002, W8 1069

<table>
<thead>
<tr>
<th>Promotion</th>
<th>Wave 6</th>
<th>Wave 8</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multi-buy promotions (e.g. 2 for price of 1 or 2 for £2)</td>
<td>15%</td>
<td>28%</td>
</tr>
<tr>
<td>Extra free</td>
<td>20%</td>
<td>26%</td>
</tr>
<tr>
<td>Previous (higher) price displayed along with new (lower price)</td>
<td>25%</td>
<td>40%</td>
</tr>
<tr>
<td>Loyalty card points</td>
<td>31%</td>
<td>35%</td>
</tr>
<tr>
<td>Food/drink displayed at check-outs or at end of aisles</td>
<td>33%</td>
<td>42%</td>
</tr>
<tr>
<td>Purchase rewards</td>
<td>35%</td>
<td>47%</td>
</tr>
<tr>
<td>Use of celebrities or cartoon characters on packs</td>
<td>47%</td>
<td>57%</td>
</tr>
</tbody>
</table>

Wave 8 compared to Wave 6 shows a decrease in the percentage of agreement for most promotions, except for use of celebrities or cartoon characters on packs, which shows an increase.
Two thirds of consumers agree that checkout placement of unhealthy foods encourages them to buy more of these foods, however support for banning this or the promotion of such foods has declined since last year.

- Placing foods high in sugar, fat or salt next to checkouts means people buy more of these items than they would otherwise: 67% agree in Wave 8, 70% in Wave 6.
- Shops should not be allowed to place foods high in fat, sugar or salt next to checkouts: 56% agree in Wave 8, 61% in Wave 6.
- Promotional offers on foods high in fat, sugar and salt should be banned: 44% agree in Wave 8, 50% in Wave 6.
- Standard portion sizes of items such as chocolate bars, savoury snacks, crisps, sweets, cakes, muffins should be reduced: 38% agree in Wave 8, 41% in Wave 6.

Q26 These statements are about food and drink in the shops. Please indicate how much you agree or disagree with each one. Base: W6 1002, W8 1069.
A majority of consumers support the idea of restricting in-store promotion of some unhealthy food and drinks, increasingly so for snack foods.

57% support restricting marketing / promotion of some unhealthy food/drink inside shops / supermarkets

Q41 If the promotion / marketing of unhealthy food and drinks was restricted inside shops and supermarkets, which foods and drinks should this cover? Base: W6 1002, W8 1069

- Sub-Net: Any snack
  - Chocolate bars and other sweets: 55% (Wave 6), 55% (Wave 8)
  - Cakes and sweet pastries: 50% (Wave 6), 52% (Wave 8)
  - Crisps and savoury snacks: 46% (Wave 6), 45% (Wave 8)
  - Biscuits: 38% (Wave 6), 38% (Wave 8)
  - Puddings: 32% (Wave 6), 34% (Wave 8)
  - Savoury pies and pastries: 31% (Wave 6), 33% (Wave 8)
  - Ice cream: 30% (Wave 6), 30% (Wave 8)
  - Cereal bars: 19% (Wave 6), 19% (Wave 8)
  - Other snack: 1% (Wave 6)

- None of these snack foods: 10% (Wave 6), 25% (Wave 8)

Q42 Would you support restricting the marketing / promotion of some unhealthy food/drink inside shops / supermarkets? Base: W6 1002, W8 1069

- Sub-Net: Any drinks
  - Fizzy or still drinks that are high in sugar: 65% (Wave 6), 69% (Wave 8)
  - Non-diet Energy drinks: 46% (Wave 6), 50% (Wave 8)
  - Pure fruit juice: 19% (Wave 6), 21% (Wave 8)
  - Other drinks: 1% (Wave 6)

- None of these drinks: 21% (Wave 6), 21% (Wave 8)
Eating healthily out of home would be easier for consumers if prices were lower, availability of healthy options was greater, and promotion of healthy options was better.

<table>
<thead>
<tr>
<th>Option</th>
<th>Wave 8</th>
<th>Wave 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lower prices for healthy options</td>
<td>57%</td>
<td>53%</td>
</tr>
<tr>
<td>More healthy options</td>
<td>55%</td>
<td>52%</td>
</tr>
<tr>
<td>Better promotion of healthy options</td>
<td>46%</td>
<td>45%</td>
</tr>
<tr>
<td>Showing the calories in food on menus</td>
<td>43%</td>
<td>43%</td>
</tr>
<tr>
<td>Being able spot healthy options quickly and easily</td>
<td>39%</td>
<td>31%</td>
</tr>
<tr>
<td>Smaller portion sizes</td>
<td>30%</td>
<td>41%</td>
</tr>
<tr>
<td>Fewer promotions on unhealthy options</td>
<td>26%</td>
<td>31%</td>
</tr>
<tr>
<td>Being able to say no to ‘upsizing’</td>
<td>22%</td>
<td>21%</td>
</tr>
<tr>
<td>Not being asked if I want to go large, make it a meal deal, or if I want to add sides or extras</td>
<td>22%</td>
<td>24%</td>
</tr>
<tr>
<td>Not displaying unhealthy options at checkouts</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Nothing/none</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>
Attitudes to healthy eating out of home show high levels of support for offering options to allow individuals to choose healthier options. Consumers strongly believe children’s menus should offer more healthy choices.

<table>
<thead>
<tr>
<th>Eating Out of Home</th>
<th>% agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Children’s menus should offer more healthy choices</td>
<td>78%</td>
</tr>
<tr>
<td>Cafes and restaurants in public buildings should provide a good example of healthy eating</td>
<td>75%</td>
</tr>
<tr>
<td>Cheap fast food is too easily available</td>
<td>70%</td>
</tr>
<tr>
<td>The type of food that is the most convenient to buy outside of the home is usually the least healthy e.g. crisps, burgers, sweets</td>
<td>69%</td>
</tr>
<tr>
<td>There are not enough healthy choices when eating out</td>
<td>53%</td>
</tr>
<tr>
<td>Having calories for meals displayed on a restaurant or café menu would make me more likely to choose to eat there</td>
<td>48%</td>
</tr>
<tr>
<td>I don’t want to think about healthy choices when I eat out</td>
<td>31%</td>
</tr>
</tbody>
</table>
Portion sizes are of concern to consumers when eating out of home. Greater levels of individual choice would be preferred.

### Portion Sizes

<table>
<thead>
<tr>
<th>Statement</th>
<th>% Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Everyone (children and adults) should be able to select smaller portion sizes of items on a menu</td>
<td>80%</td>
</tr>
<tr>
<td>Children should always be offered smaller portions from the adult menu</td>
<td>71%</td>
</tr>
<tr>
<td>Large portion sizes of drinks and snacks such as muffins, cakes and pastries and popcorn should be reduced</td>
<td>51%</td>
</tr>
<tr>
<td>Portion sizes of drinks and snacks in cinemas should be reduced</td>
<td>48%</td>
</tr>
<tr>
<td>Portions when eating out of the home (e.g. in cafes, restaurants and takeaways) are too big</td>
<td>37%</td>
</tr>
</tbody>
</table>

### Upsizing

<table>
<thead>
<tr>
<th>Statement</th>
<th>% Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I don't think restaurants, coffee shops and takeaways should encourage us to 'upsize'</td>
<td>64%</td>
</tr>
<tr>
<td>Promotional offers on foods high in fat, sugar and salt should be banned</td>
<td>43%</td>
</tr>
<tr>
<td>I am asked to upsize food and drinks too frequently</td>
<td>27%</td>
</tr>
<tr>
<td>I find it hard to say no when I’m asked if I want to go large, make it a meal deal or add sides or extras</td>
<td>20%</td>
</tr>
</tbody>
</table>
7. Allergens

This question set is designed to measure the instance and types of food allergies within Scottish households. In the latest questionnaire, this section was expanded to understand more about attitudes of and towards those with food allergies.
1 in 10 households in Scotland contain at least one person with a food allergy, covering a range of types of food notably milk, gluten and nuts.

11% of Scottish households include at least one person with a food allergy.

## Food Allergies in Household

<table>
<thead>
<tr>
<th>Type of Allergy</th>
<th>Individual</th>
<th>Family member</th>
</tr>
</thead>
<tbody>
<tr>
<td>Milk</td>
<td>20%</td>
<td>19%</td>
</tr>
<tr>
<td>Cereals containing gluten</td>
<td>11%</td>
<td>20%</td>
</tr>
<tr>
<td>Sulphur dioxide/sulphites</td>
<td>5%</td>
<td>13%</td>
</tr>
<tr>
<td>Eggs</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td>Nuts</td>
<td>11%</td>
<td>16%</td>
</tr>
<tr>
<td>Peanuts</td>
<td>9%</td>
<td>16%</td>
</tr>
<tr>
<td>Crustaceans,</td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td>Fish</td>
<td>8%</td>
<td>11%</td>
</tr>
<tr>
<td>Molluscs</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td>Mustard</td>
<td>3%</td>
<td>9%</td>
</tr>
<tr>
<td>Celery</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Soybeans</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Sesame</td>
<td>1%</td>
<td>9%</td>
</tr>
<tr>
<td>Lupin</td>
<td>0%</td>
<td>9%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
<td>39%</td>
</tr>
</tbody>
</table>
More than 8 in 10 of those with food allergies are concerned about allergens in food, however they largely feel they can access clear information about ingredients in food that may cause an allergic reaction.

Q11 Please sort each of these issues according to whether or not they cause you concern or do not cause you concern.

Q13 Do you have clear information on...? Base: All respondents W8 1069, W8 151 (all with a food allergy)

- Over 75s, males and those with no kids at home were most likely to say they did not have clear information.
Most consumers with food allergies say it is quite easy to find allergy information about food purchased in supermarkets, mainly using labels as the source of allergen information. They say finding this information is less easy when eating out of home.

**Ease of Finding Allergy Info**

- **Very easy**
  - Foods you are buying in supermarket: 24%
  - Foods when eating away from home: 10%

- **Quite easy**
  - Foods you are buying in supermarket: 54%
  - Foods when eating away from home: 32%

- **Neither**
  - Foods you are buying in supermarket: 19%
  - Foods when eating away from home: 27%

- **Quite difficult**
  - Foods you are buying in supermarket: 10%
  - Foods when eating away from home: 32%

- **Very difficult**
  - Foods you are buying in supermarket: 3%
  - Foods when eating away from home: 8%

**Main Sources of Allergy Info Out of Home**

- **Labels on food**: 67%
- **Ask staff for info**: 51%
- **Menus**: 47%
- **Restaurant website**: 14%
- **Other in store info**: 10%
Adults with food allergies are generally comfortable discussing these with friends, whilst young people are slightly less so. Although most mention their allergies when eating out, the practice is by no means universal.

**Allergy Behaviours**

- Feel comfortable talking about my food allergies with friends: 73% (Respondent), 61% (Child)
- Always tell waiter/waitress about food allergies when eating out in a restaurant/café: 64% (Respondent), 60% (Child)
- Always tell staff about food allergies when buying “food to go” from a sandwich shop/takeaway: 40% (Respondent), 52% (Child)
- If a food label says “may contain” something I’m allergic to, I would still eat it: 23% (Respondent)
- It’s easy to avoid food allergens when ordering a take-away: 24%

**Carry Epipen/Auto Injector**

- Yes, always: 35%
- Yes, sometimes: 17%
- No: 12%
- I don’t have/need one: 35%
Amongst the general public, most agree that food allergies can be severe and are nothing to be embarrassed about. However, more than a third don’t necessarily believe people who say they have a food allergy.

Q55 To what extent do you agree or disagree with the following statements about food allergies? Base: All respondents W8 1069

<table>
<thead>
<tr>
<th>Statement</th>
<th>% agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food allergies can be life-threatening</td>
<td>90%</td>
</tr>
<tr>
<td>Having a food allergy is nothing to be embarrassed about</td>
<td>88%</td>
</tr>
<tr>
<td>I always check if people I’m cooking for have a food allergy</td>
<td>52%</td>
</tr>
<tr>
<td>I don’t believe that all the people who say they have a food allergy really do</td>
<td>35%</td>
</tr>
<tr>
<td>Food intolerances are a myth</td>
<td>9%</td>
</tr>
</tbody>
</table>

- **Strongly agree**
- **Agree**
- **Neither agree nor disagree**
- **Disagree**
- **Strongly disagree**
- **Don't know**
We hope you’ve found our Food in Scotland Consumer Tracking Survey of interest. Here’s a summary of the areas we’ve covered:

- **Knowledge, Awareness & Visibility of FSS**
- **Healthy Eating – attitudes, knowledge & behaviour**
- **Encouraging healthier diets – consequences & levers to behaviour change**
- **Allergens**