

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



Awareness, Knowledge & Trust

- 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.

Encouraging Healthier Diets

- 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.

Allergens

- 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 takeaways/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

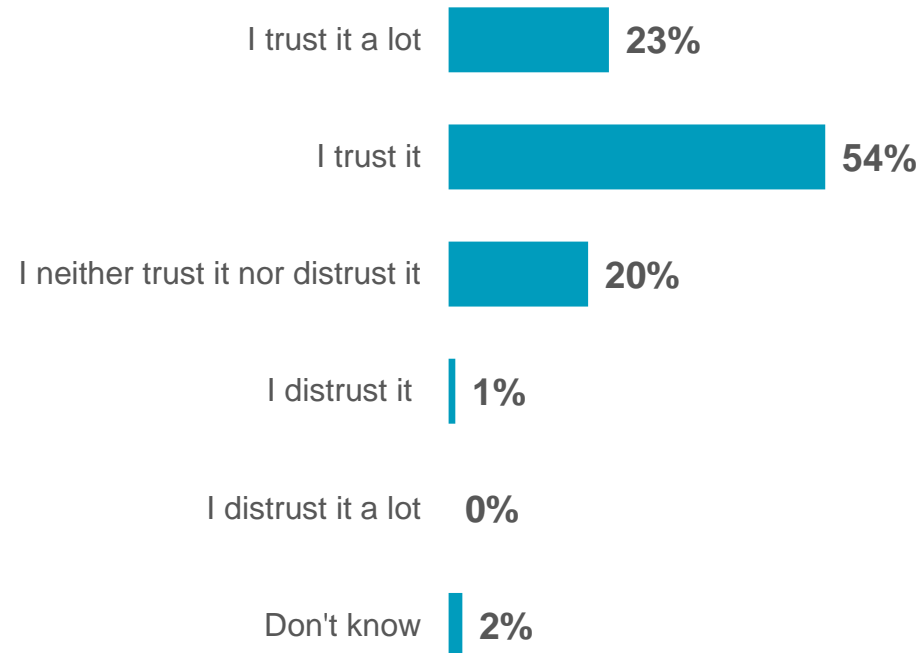
This section also seeks to understand the wider context in which FSS is operating - looking at issues causing concern for consumers.

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

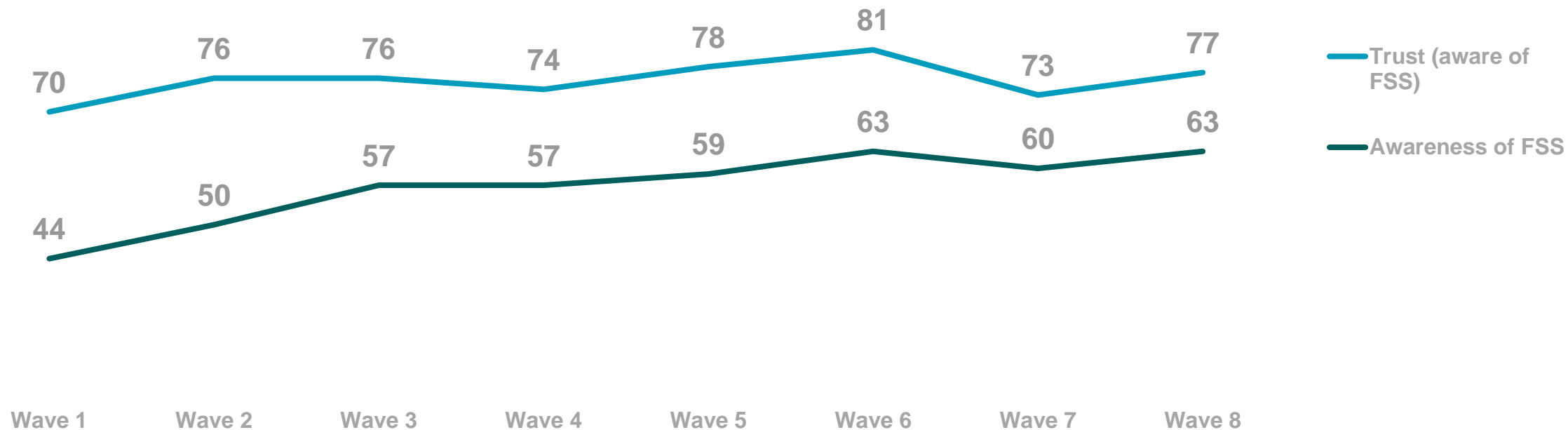
Levels of Trust in FSS



**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.



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.



Food is Safe

Ensuring the food you buy is safe to eat

71%

Promoting food safety in the home

53%

Date labels, such as "best before" and "use by" labels

54%

Allergen labelling on all food packaging

52%



Food is Authentic

Food authenticity – i.e. food is what it says it is on the packaging

62%

Country of origin labels, which identify where food comes from

49%



Healthier Diets

Nutrition labelling information on food packaging

51%

Promoting and enabling healthy eating

46%



Responsible Food Businesses Flourish

Working with the food industry and business to improve standards

66%

Overseeing inspections of restaurants and other food businesses for food hygiene

62%

Ensuring food is sustainable - such as reducing green house emissions and reducing waste when producing food

34%

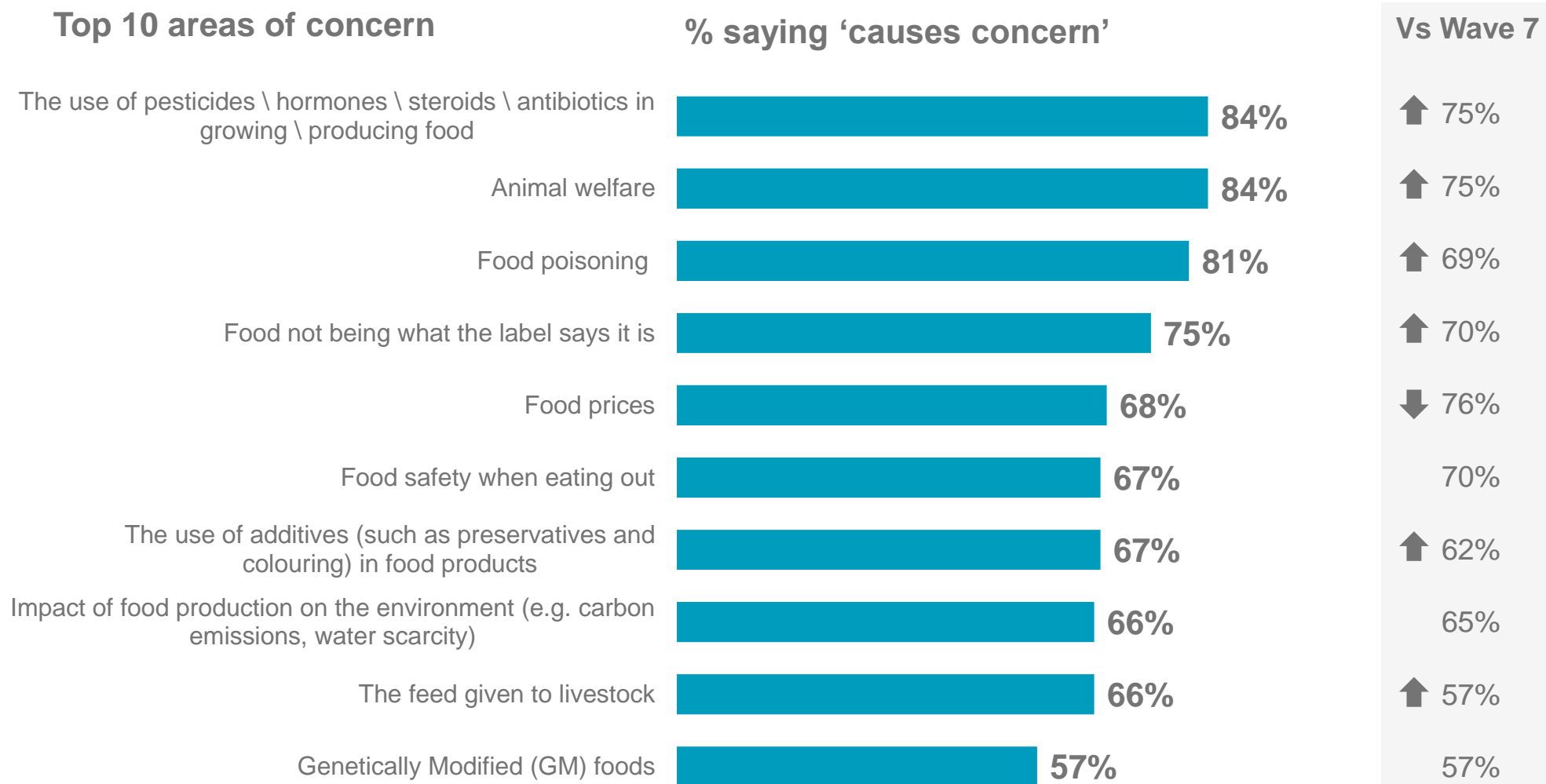
- Those in youngest age group (16-34yrs) are less likely to be aware of many of the areas of responsibility – other than healthy eating and labelling.

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.



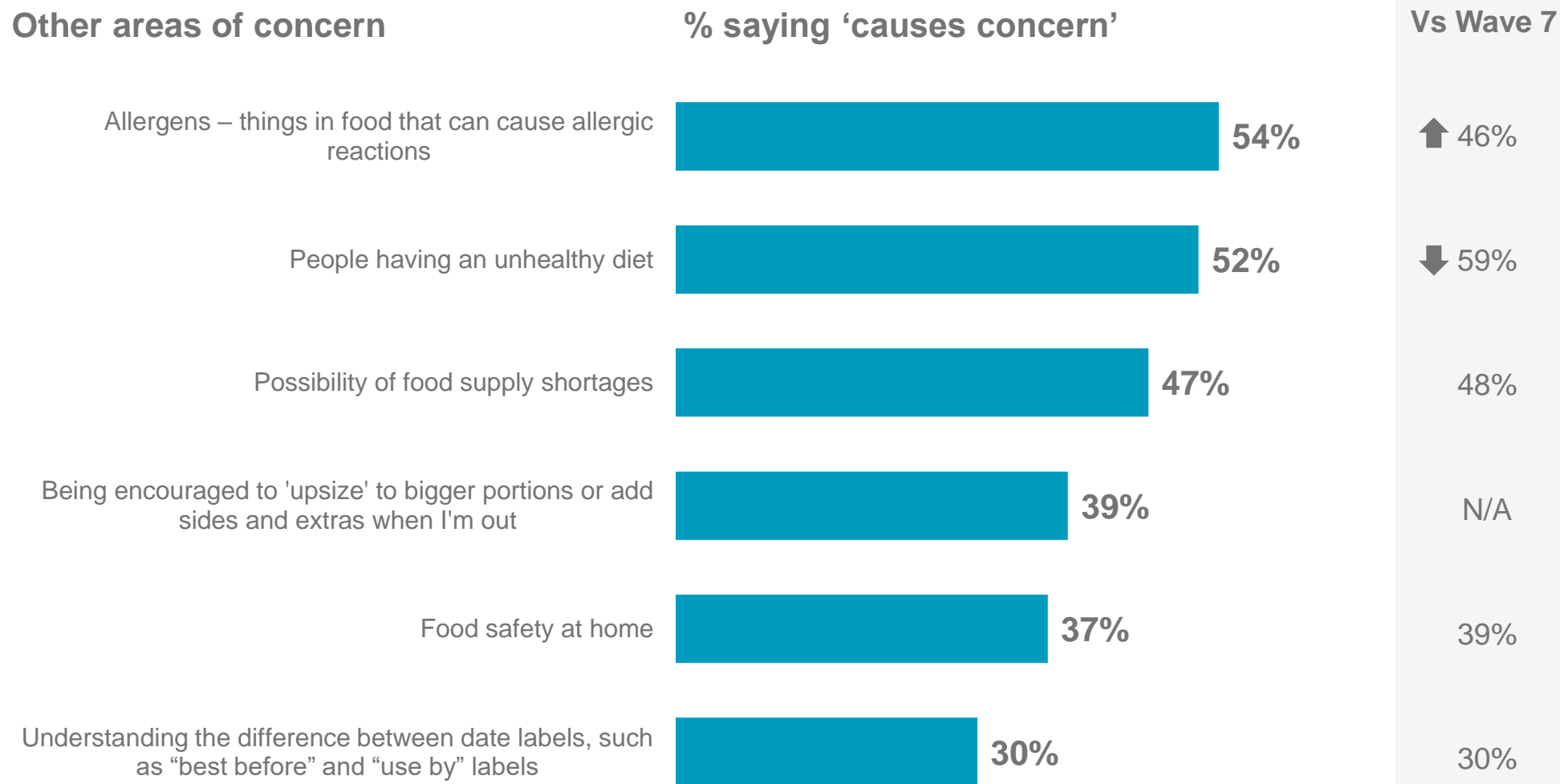
Denotes significant difference vs previous wave (95% confidence level)

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.



- 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.



- 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.

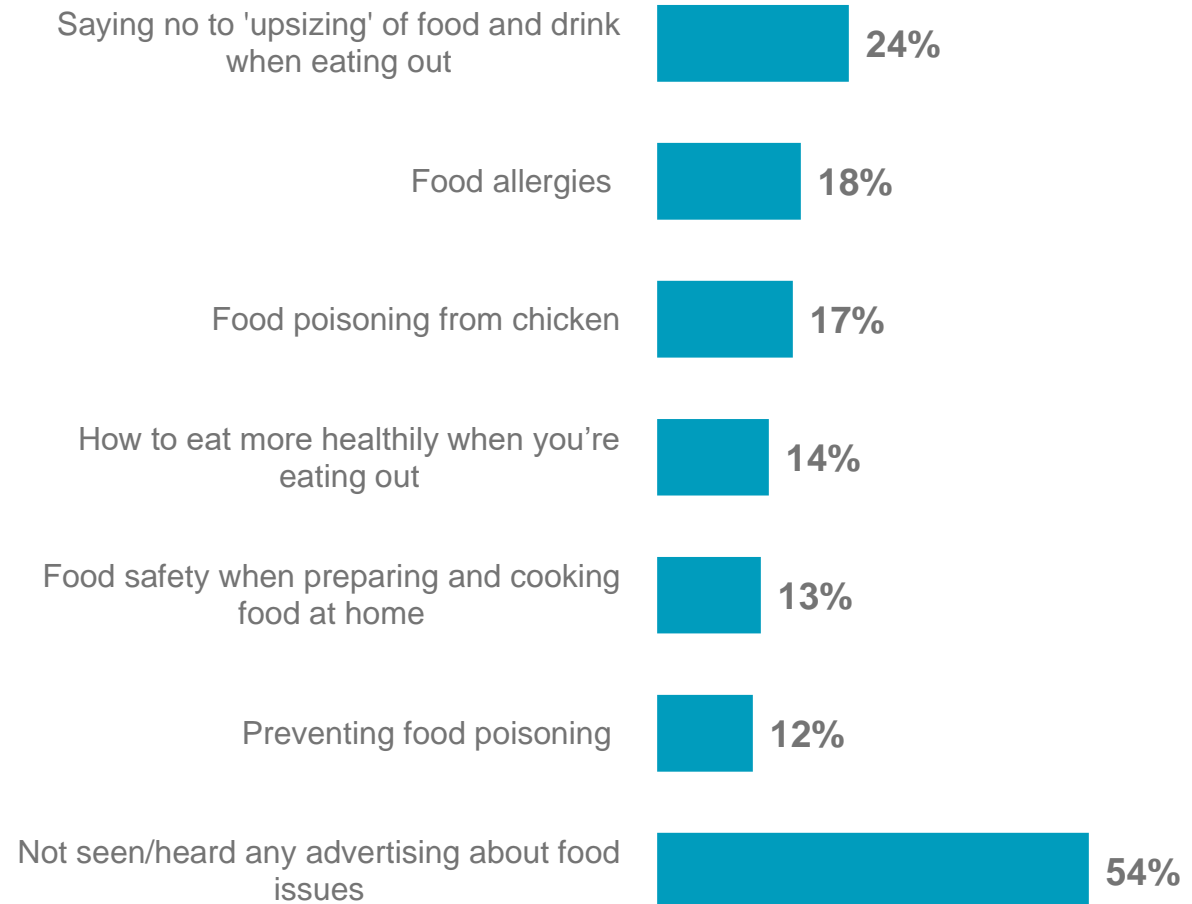
Almost half of consumers were aware of advertising on food issues. Upsizing was the most widely recalled, by around a quarter, significantly more than at Wave 7.



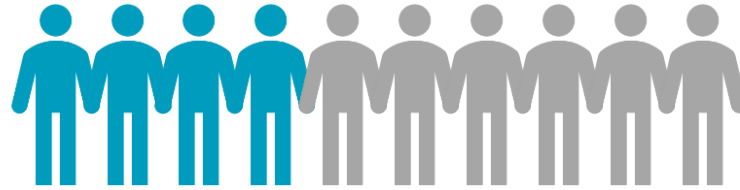
46% were
spontaneously aware
of advertising

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

Aware of Advertising on Food Issues

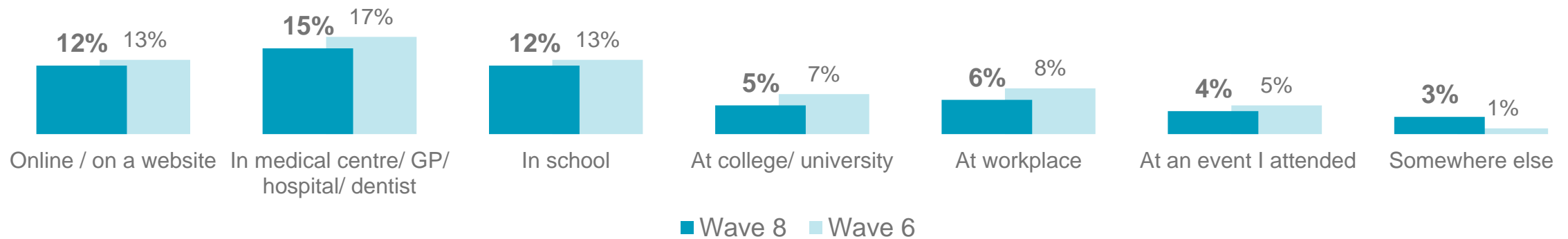


4 in 10 consumers recognise the Eatwell Guide, consistent with summer 2018. Medical centres, schools and online were key locations for driving awareness.



40% have seen the Eatwell Guide

Wave 6 = 40%



5. Healthy Eating



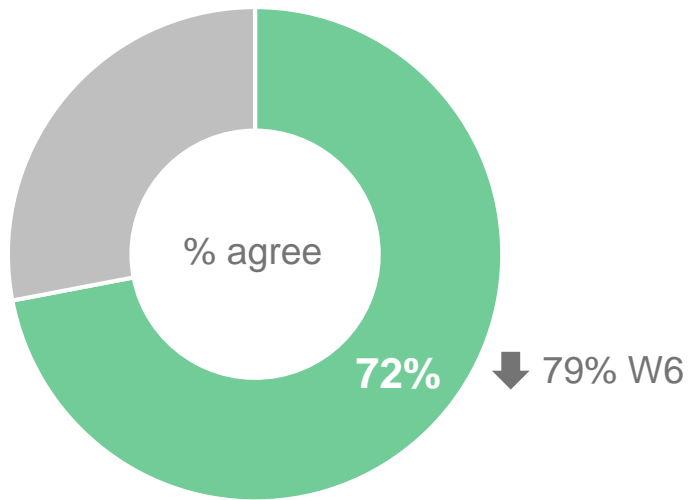
This question set is designed to deliver insight and track changes for the following strategic objective :

→ Consumers Have Healthier Diets

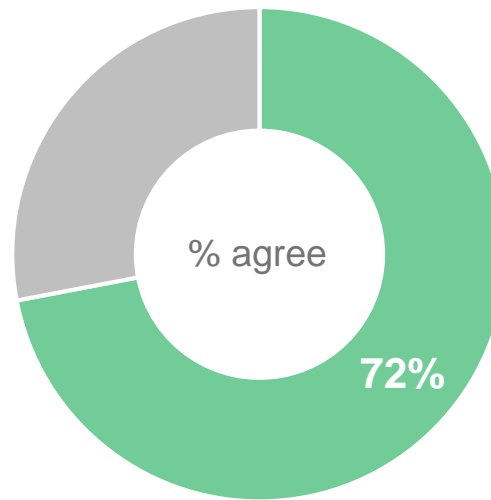
This section focuses on consumer attitudes, knowledge and current behaviour with regards to healthy eating.

There is widespread concern about unhealthy eating in Scotland and acknowledgement that significant diet changes are required to improve the nation's health.

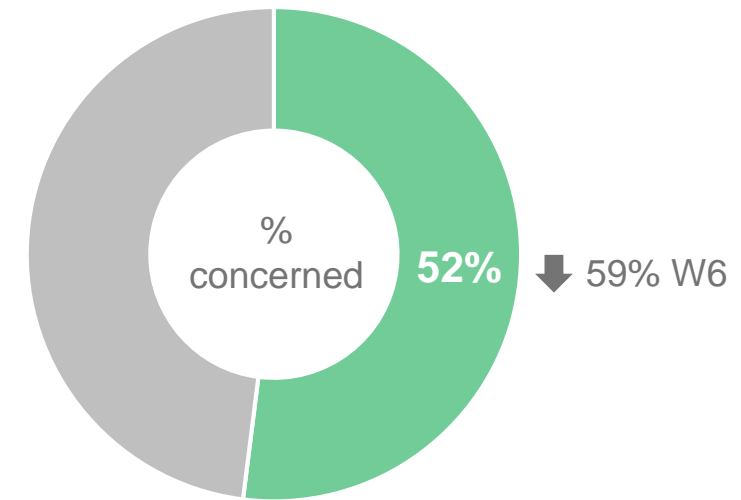
In Scotland we have to make significant changes to what we eat to be healthier



There are too many people who eat unhealthily in Scotland



Concerned about people having an unhealthy diet



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

Wave 6 = 59%



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

Wave 6 = 56%



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



30%

Reducing amount of sugar

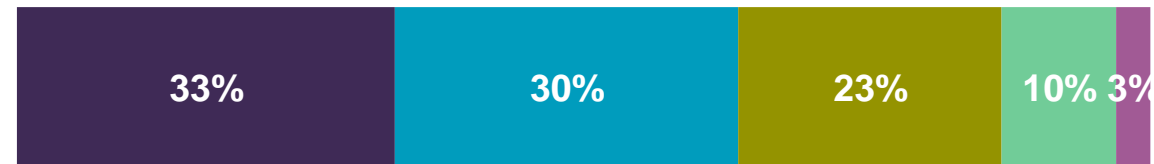


25%

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.)



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



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



■ Always or nearly always ■ Mostly ■ Sometimes ■ Rarely ■ Never

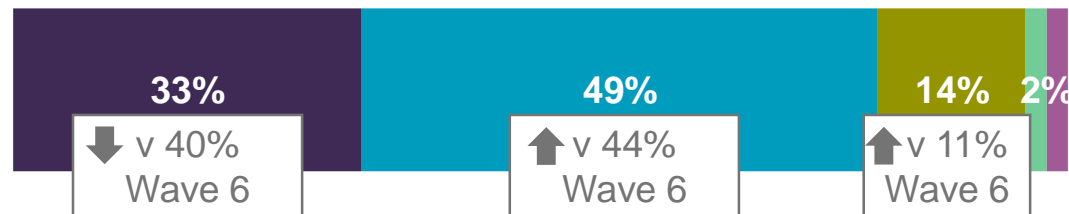
Wave 8 = bold colours
Wave 6 = shadow

Q19 Looking at each of these statements, please indicate how regularly you do this? Base: W6 1002, W8 1069

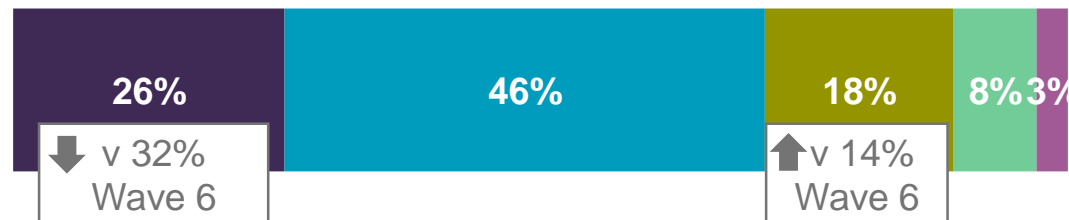
Whilst the majority of Scots consider it important to eat 5 a day, restrict consumption of unhealthy foods and check on-pack nutrition information, fewer think these are ‘very’ important than before, rather saying they are ‘quite’ important.



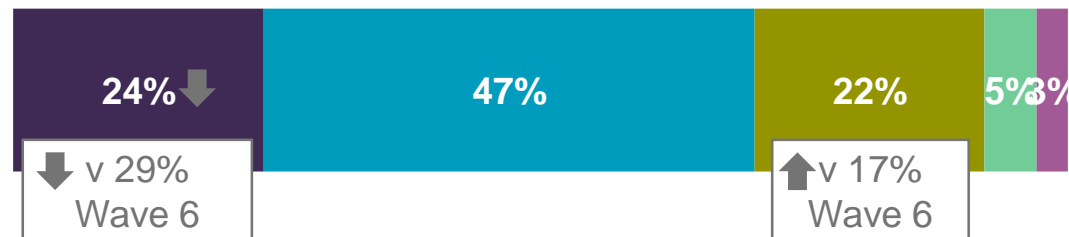
Eat at least 5 portions of a variety of fruit and vegetables each day



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







■ Very important ■ Quite important ■ Not very important ■ Not at all important ■ Don't know

Wave 8 = bold colours

Wave 6 = shadow

Q20 How important are these to you when thinking about what you eat and drink? Base: W6 1002, W8 1069

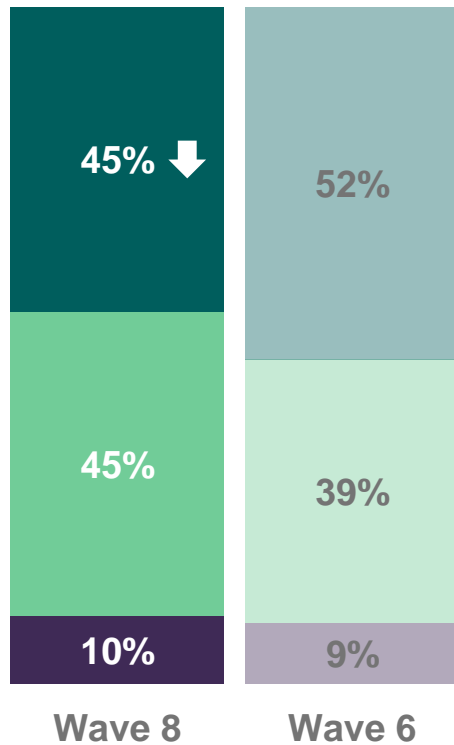
The clear gap between attitudes and behaviours is evident, particularly with regards to eating 5 portions of fruit / vegetables every day.

	ATTITUDE	BEHAVIOUR
	Importance (very/quite)	Always / mostly
 Eat at least 5 portions of a variety of fruit and vegetables each day	82%	45%
 Only having foods that are high in fat, salt or sugars (e.g. confectionery, biscuits, cakes) occasionally and in small amounts	72%	n/a
 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	71%	45%
 Drink at least 6 to 8 cups or glasses of fluid every day (for example water, tea or coffee, etc.)	n/a	63%

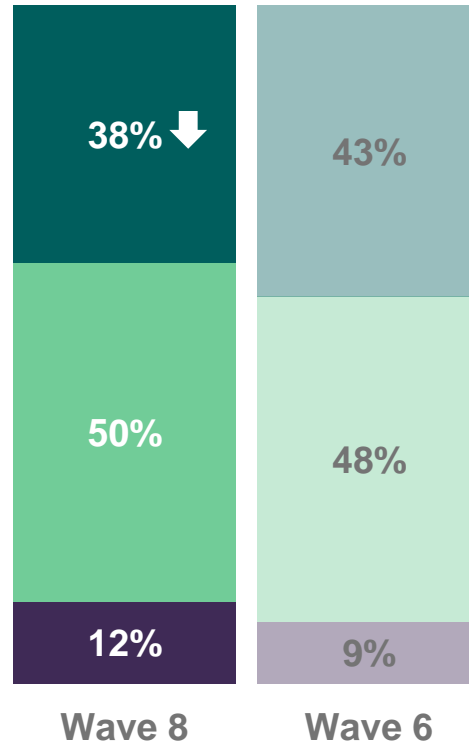
9 in 10 consumers are concerned about the amount of sugar in food. Saturated fat, fat and salt are also causes for concern. Latest data shows a slight shift away from being concerned a lot, to being concerned a little.



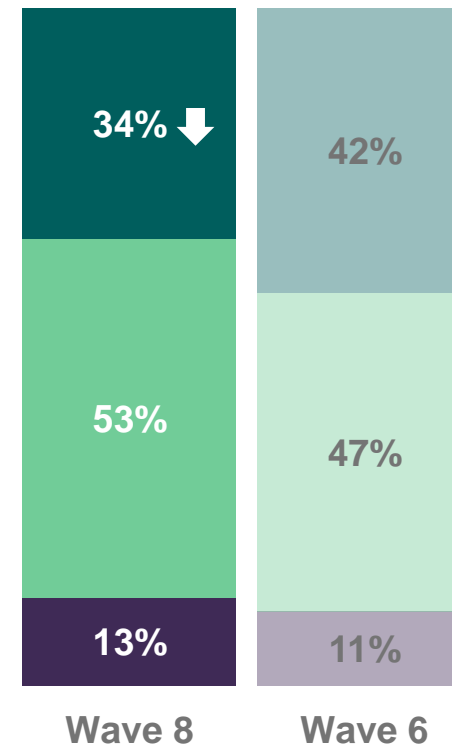
The amount of sugar in food



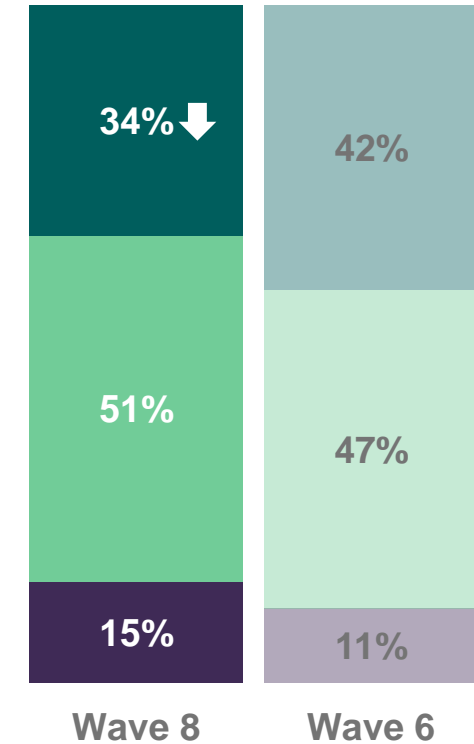
The amount of saturated fat in food



The amount of fat in food

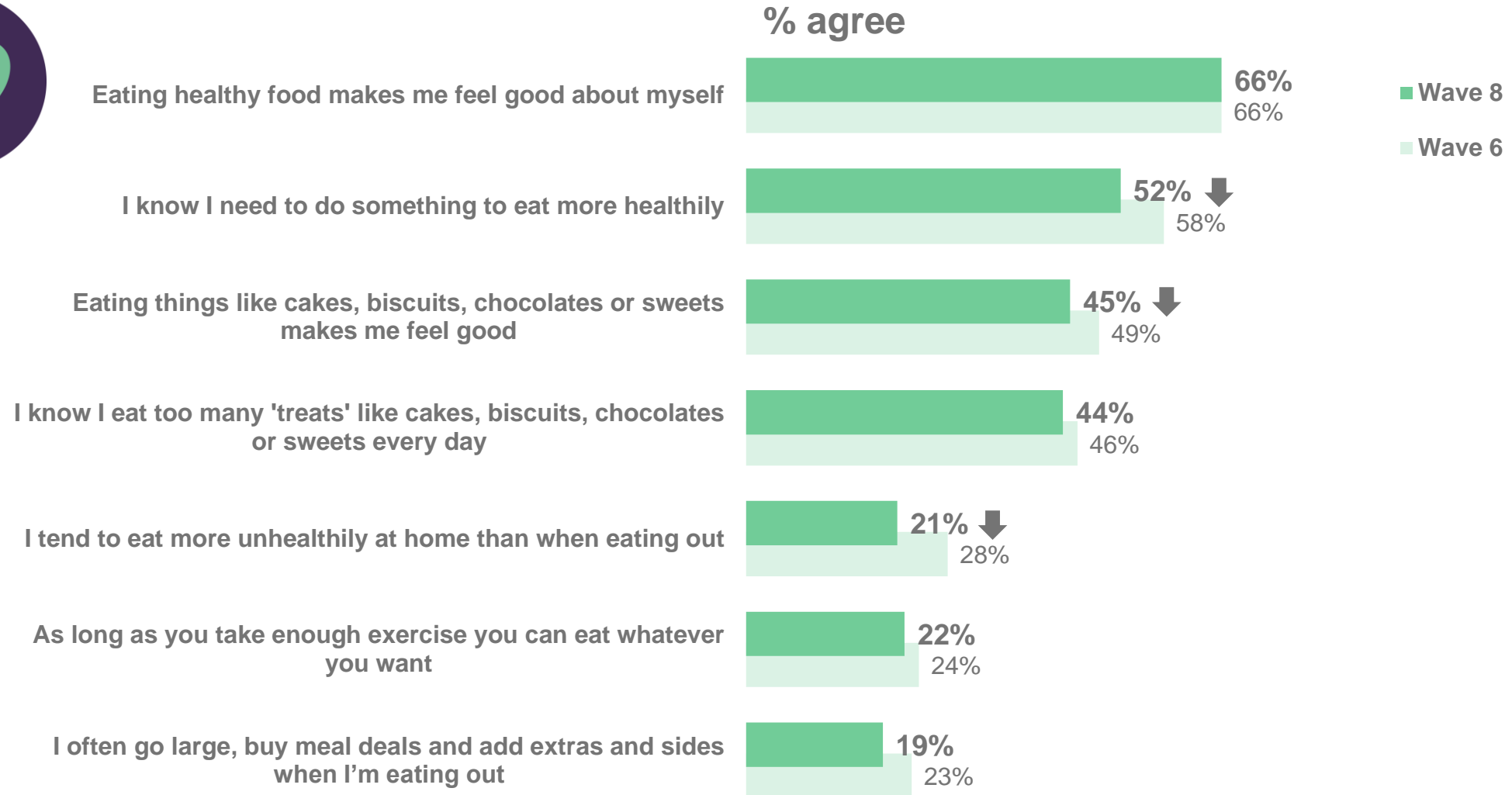


The amount of salt in food

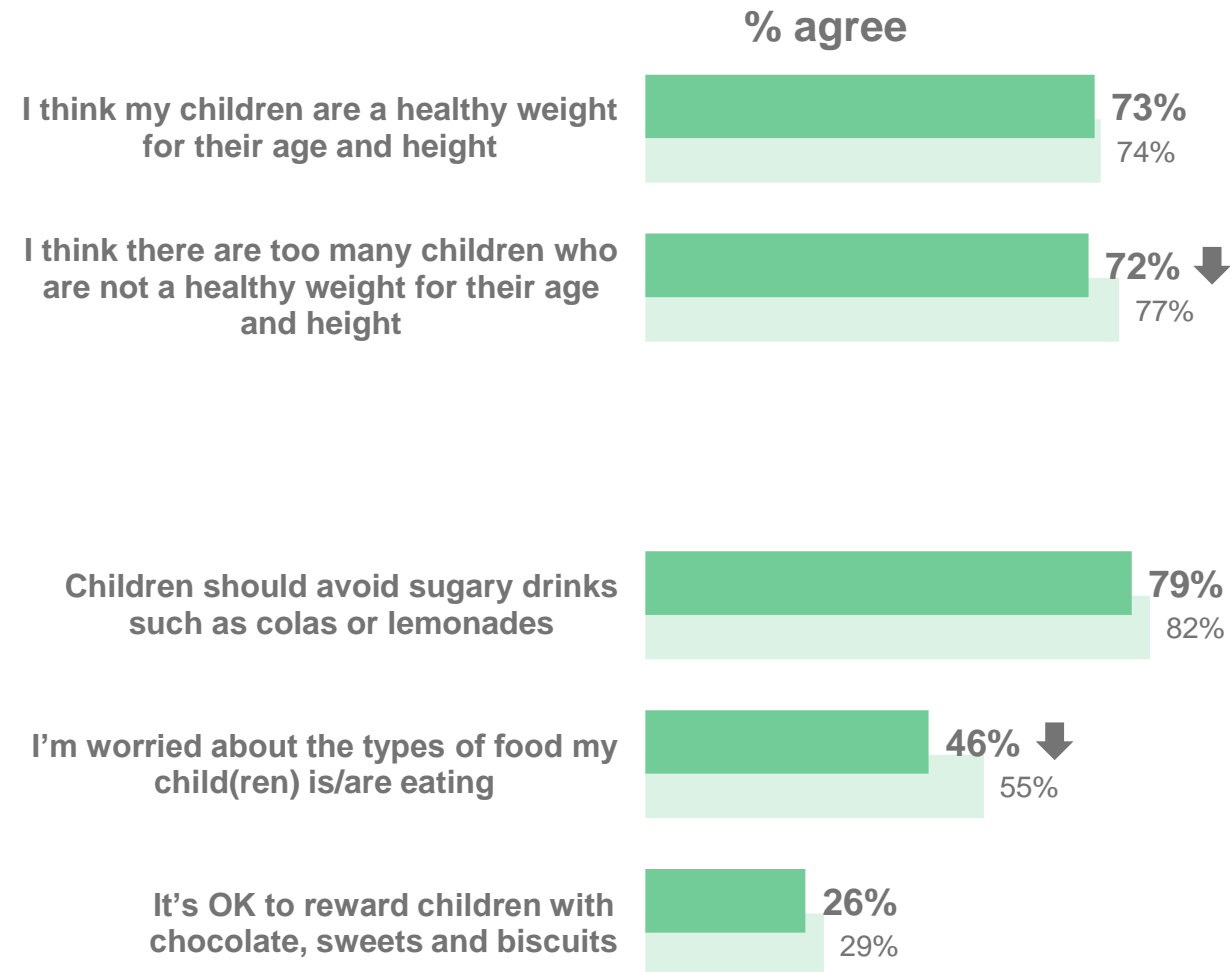


■ A lot
■ A little
■ Not at all

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.



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.

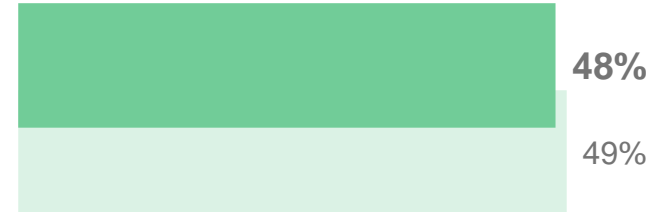


Barriers to healthy eating are acknowledged as relating to cost and time, with only a quarter believing healthy eating isn't appealing. Younger age groups are more likely than others to cite barriers.

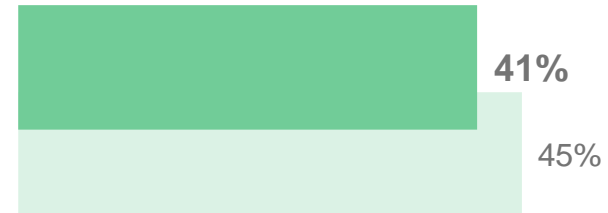


Healthy eating is too expensive

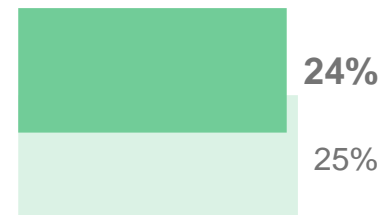
% agree



Most people lack time to make healthy meals



Healthy eating isn't appealing



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.

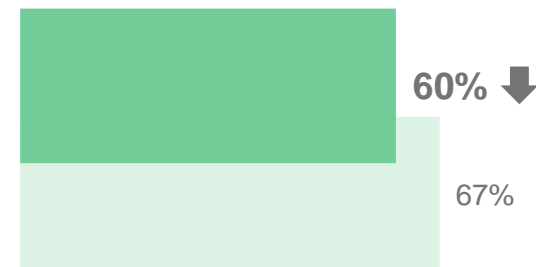


93% say they have clear information on eating a healthy balanced diet

Wave 7 = 88% ↑

The experts contradict each other over what foods are good or bad for you

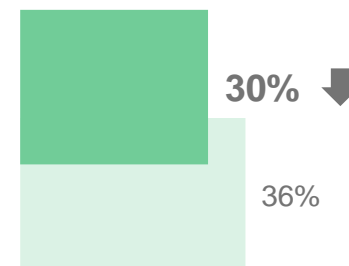
% agree



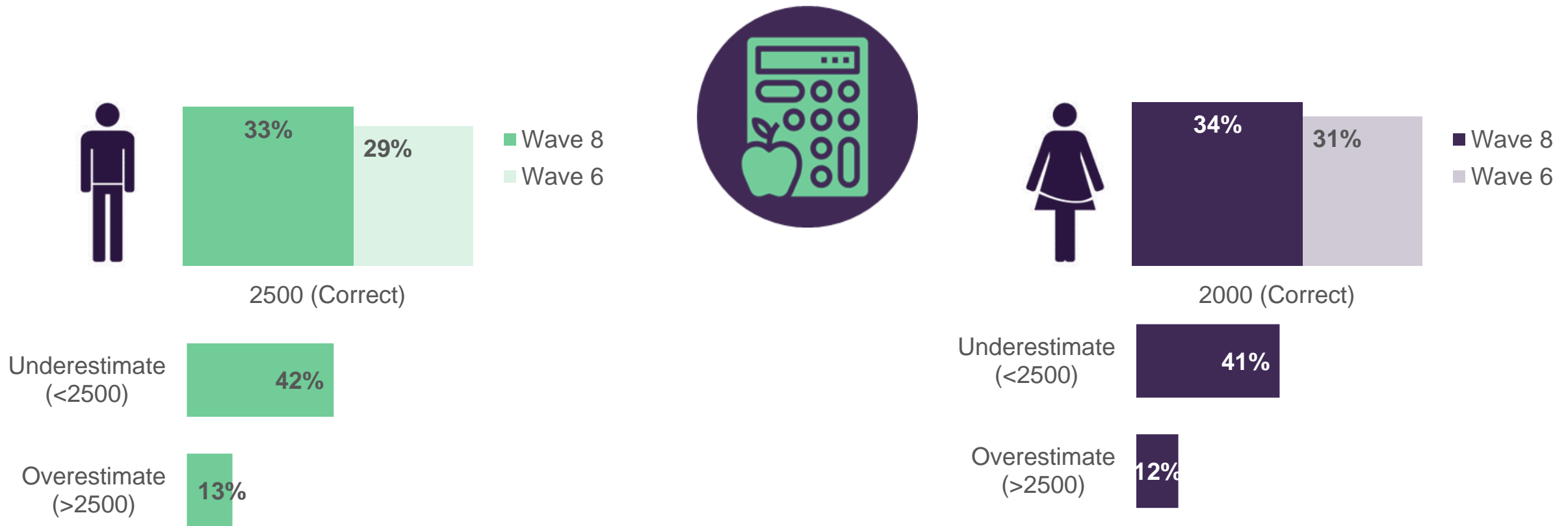
■ Wave 8

■ Wave 6

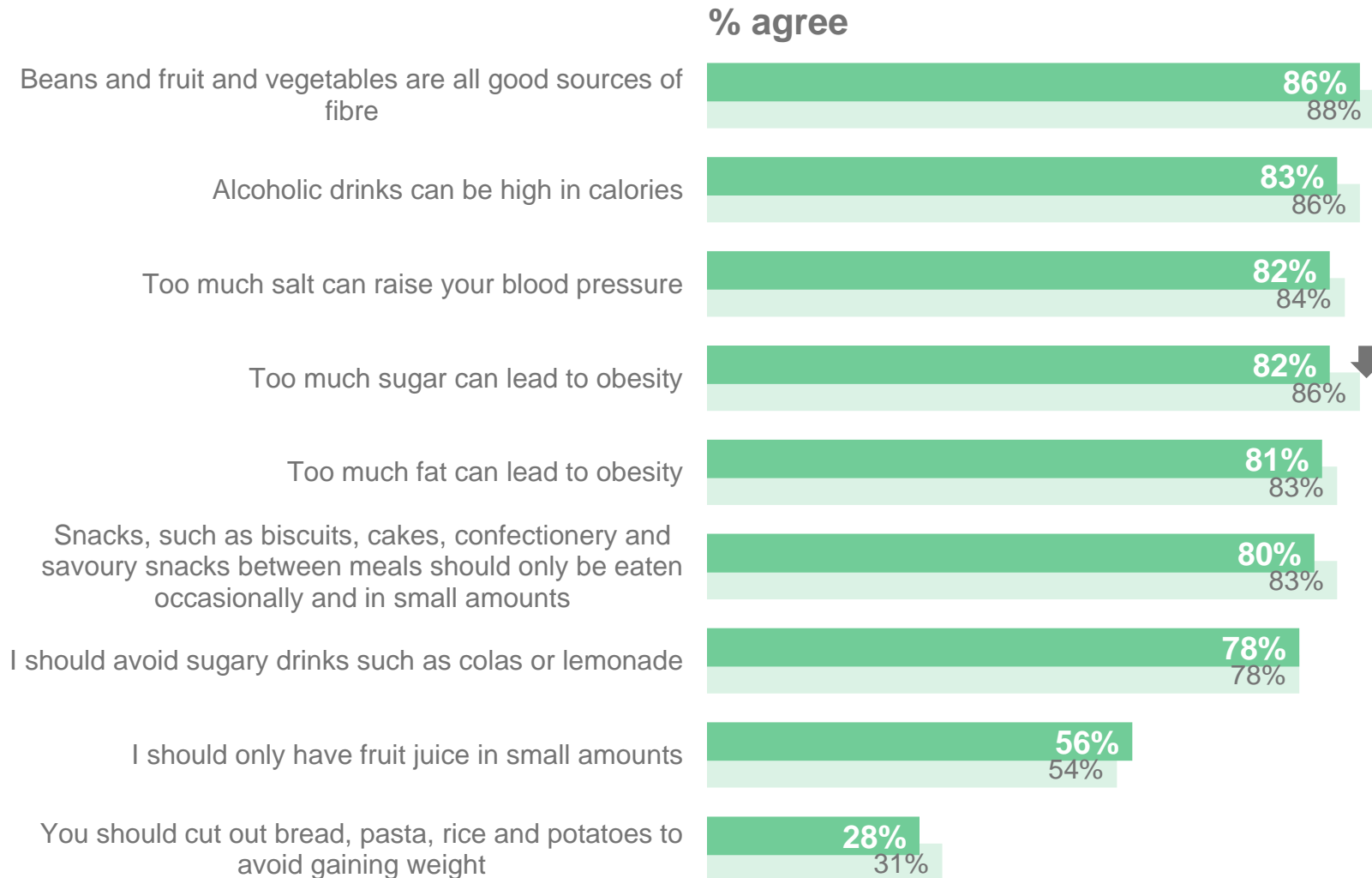
I get confused over what's supposed to be healthy and what isn't



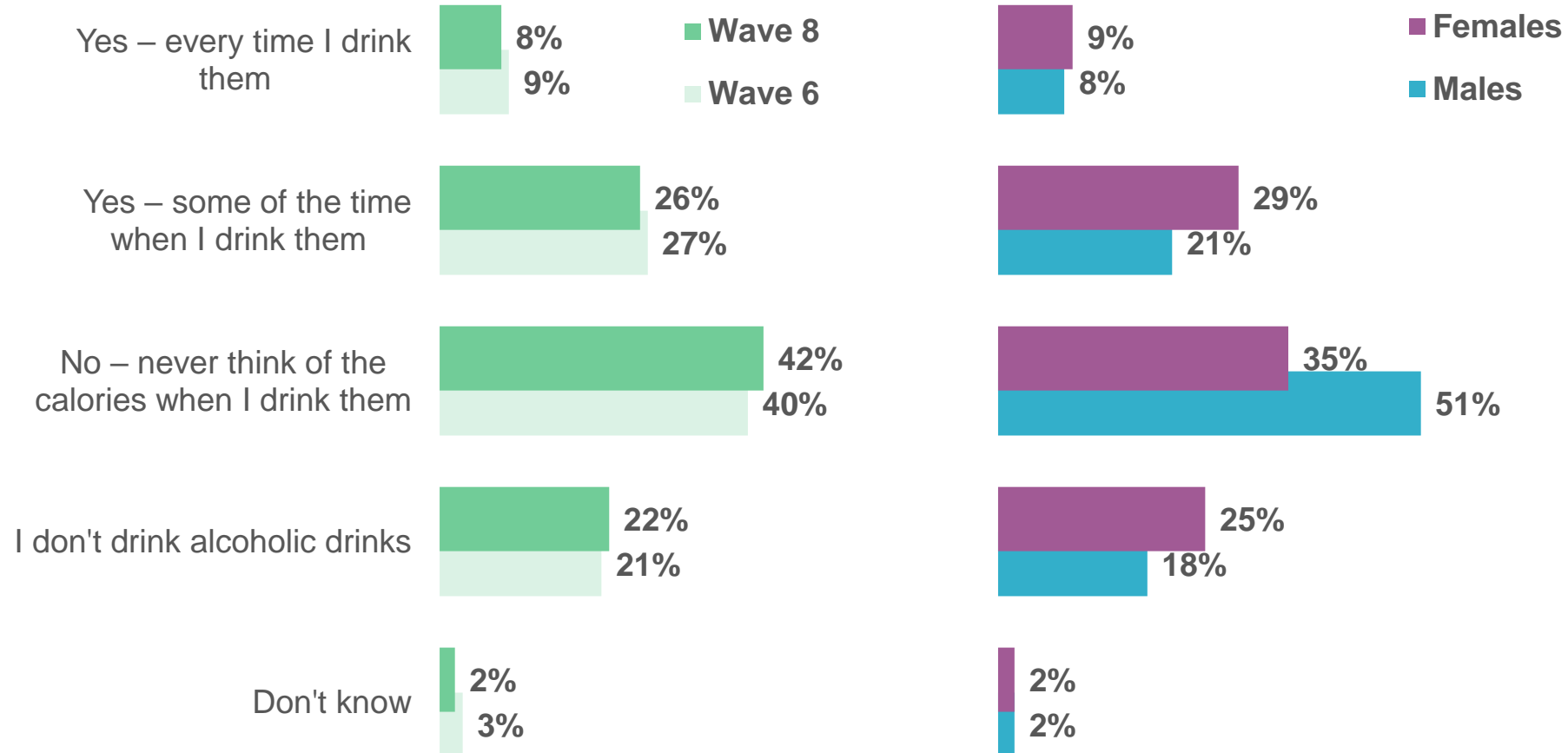
A third of Scots know the correct recommended calorie intake for males and females, consistent with previous waves. Most tend to underestimate.



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.



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.



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.

% consumers giving correct amount of sugar in each drink



37%

Diet drink



9%

Orange juice



6%

Soft drink



1%

Energy drink



0%

Fruit smoothie

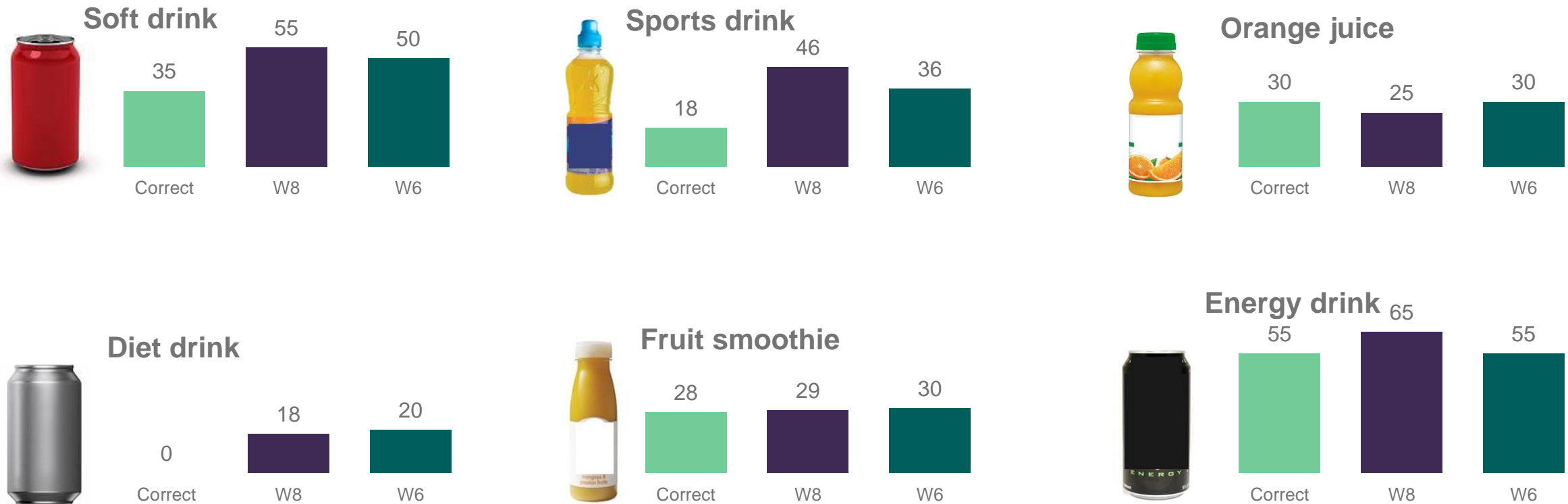


0%

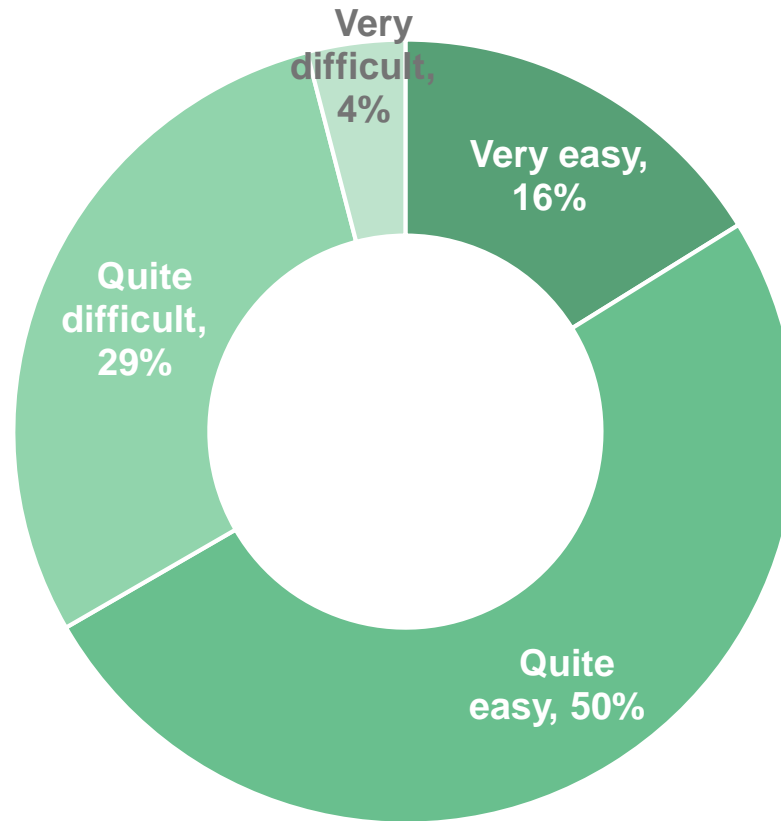
Sports drink

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)



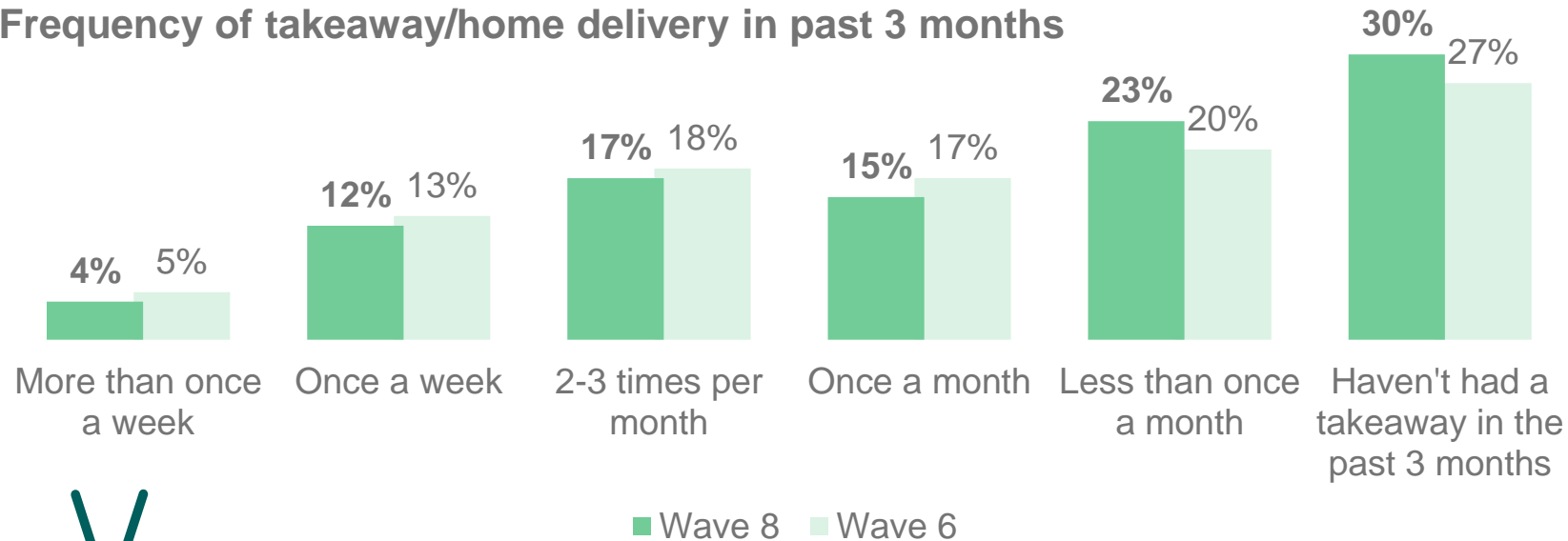
Two thirds of Scots think it is easy for them to eat healthily out of home, a significant increase over the past year. Younger age groups and females find it most difficult.



% 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



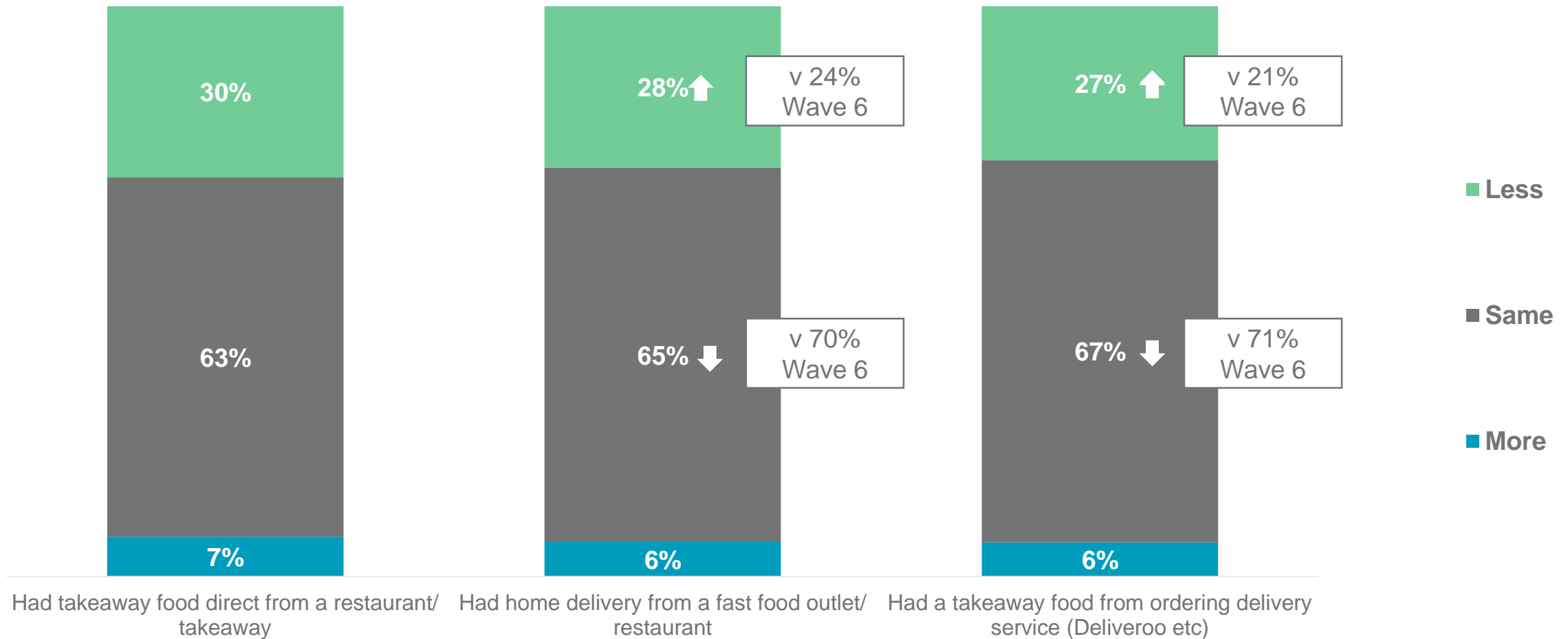
SUMMARY	Wave 8	Wave 6
In past 3 months	70%	73%
1+ per month	48%	53%
1+ per week	16%	18%



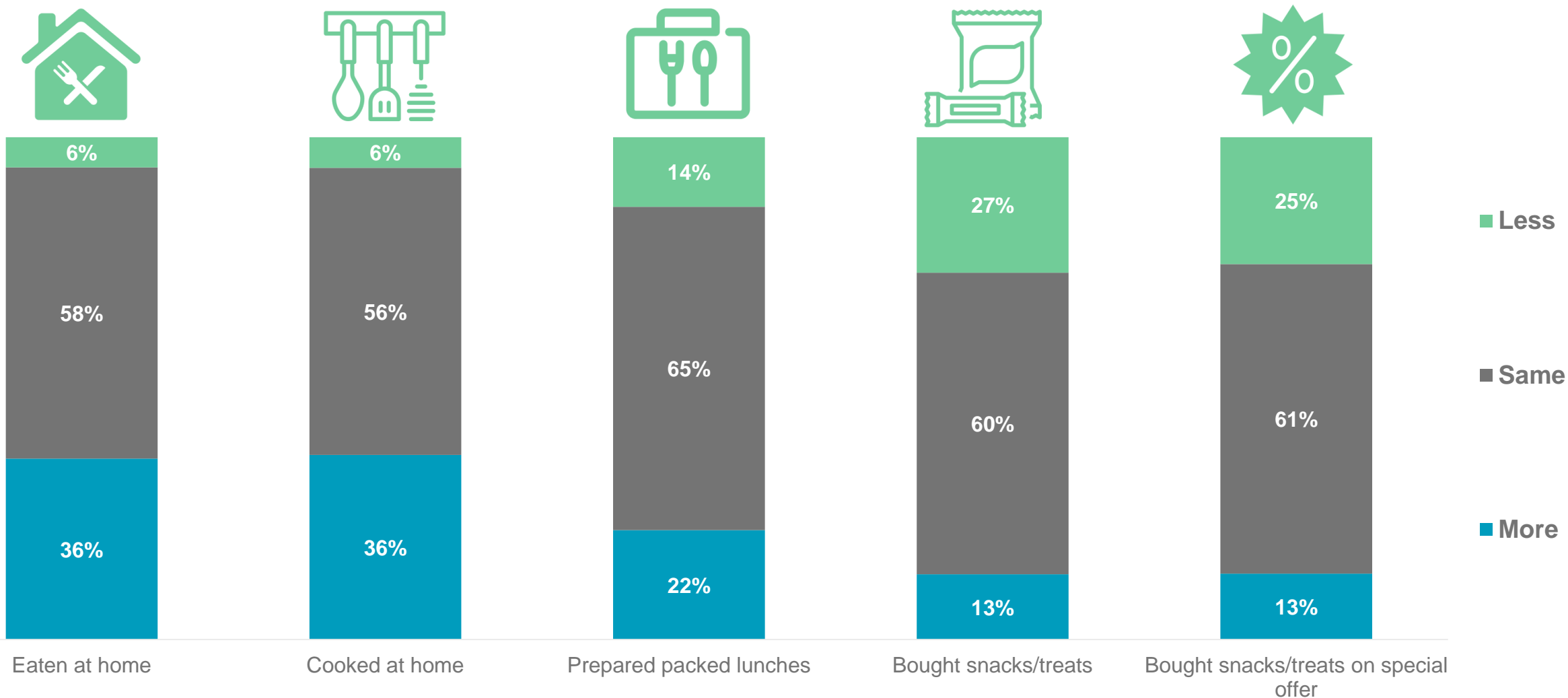
How often takeaway/home delivery came from ordering / delivery service e.g. Deliveroo, UberEats, Just Eat

	Wave 8	Wave 6
At least once in past 3 months	58%	53%
1+ per month	42%	40%
1+ per week	15%	14%

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.



6. Encouraging Healthier Diets



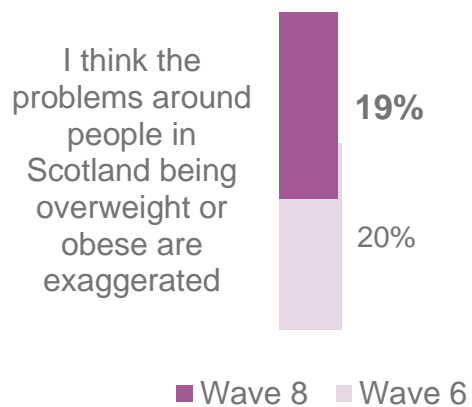
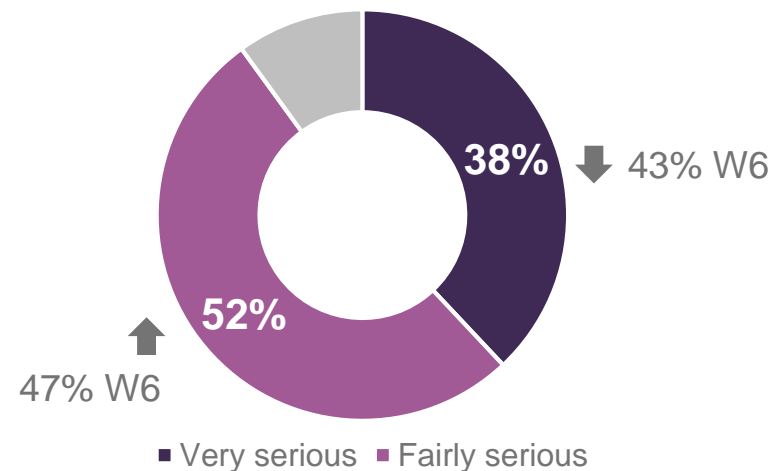
This question set is also designed to deliver insight on the following strategic objective :

→ Consumers Have Healthier Diets

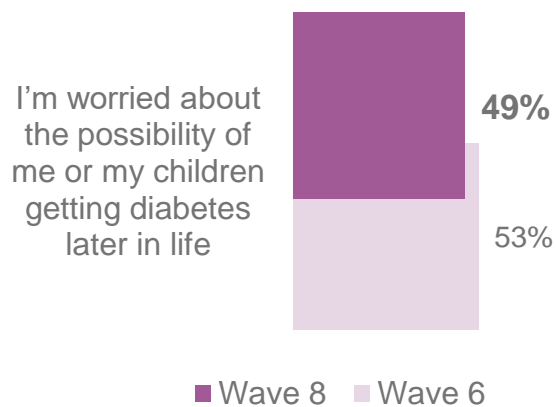
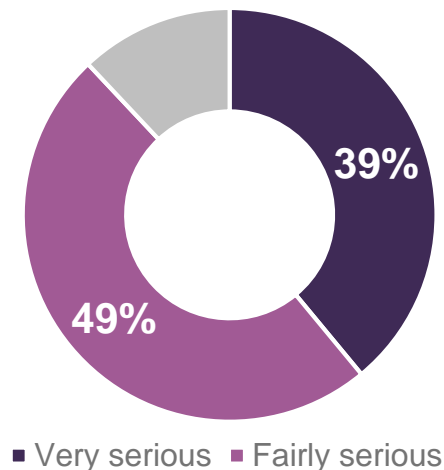
However, this section focuses more on consumer understanding of the consequences of unhealthy diets, and attitudes towards potential measures to encourage healthier diets.

Consumers are aware of the potential negative consequences of obesity on their health.

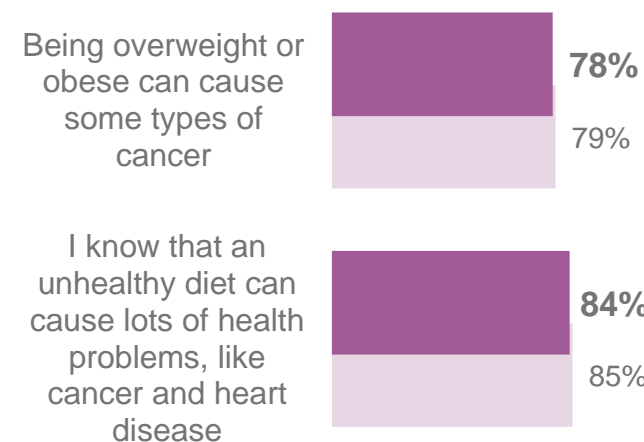
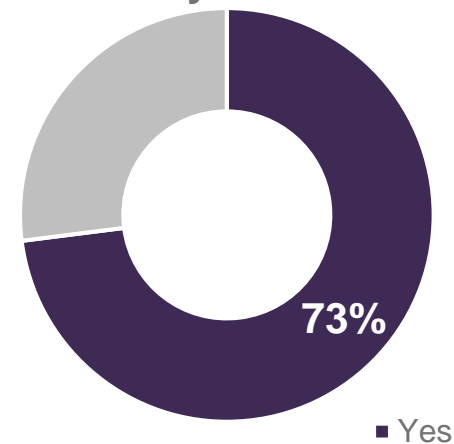
Obesity in Scotland



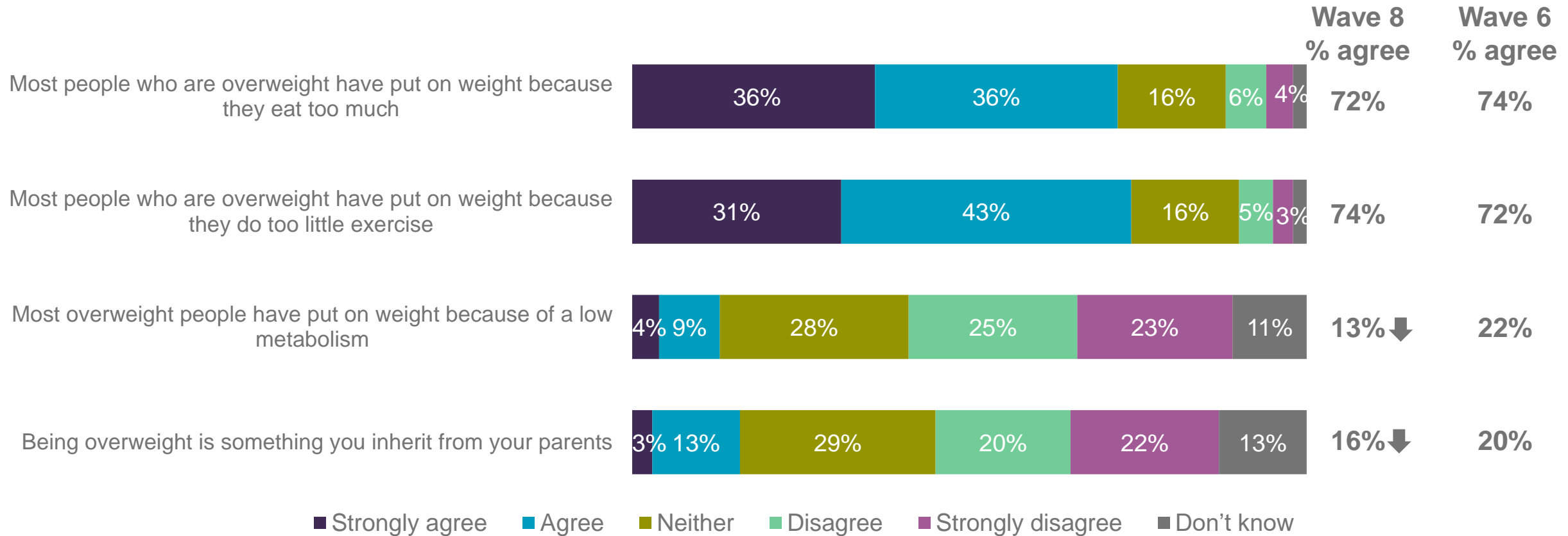
T2D in Scotland



Believe link between Obesity & Cancer



Consumers strongly link weight gain to eating too much and doing too little exercise. Less certainty exists around metabolism and genetics.



Whilst consumers believe out of home and retail establishments should play their part, they do not abdicate all responsibility for healthy diets.

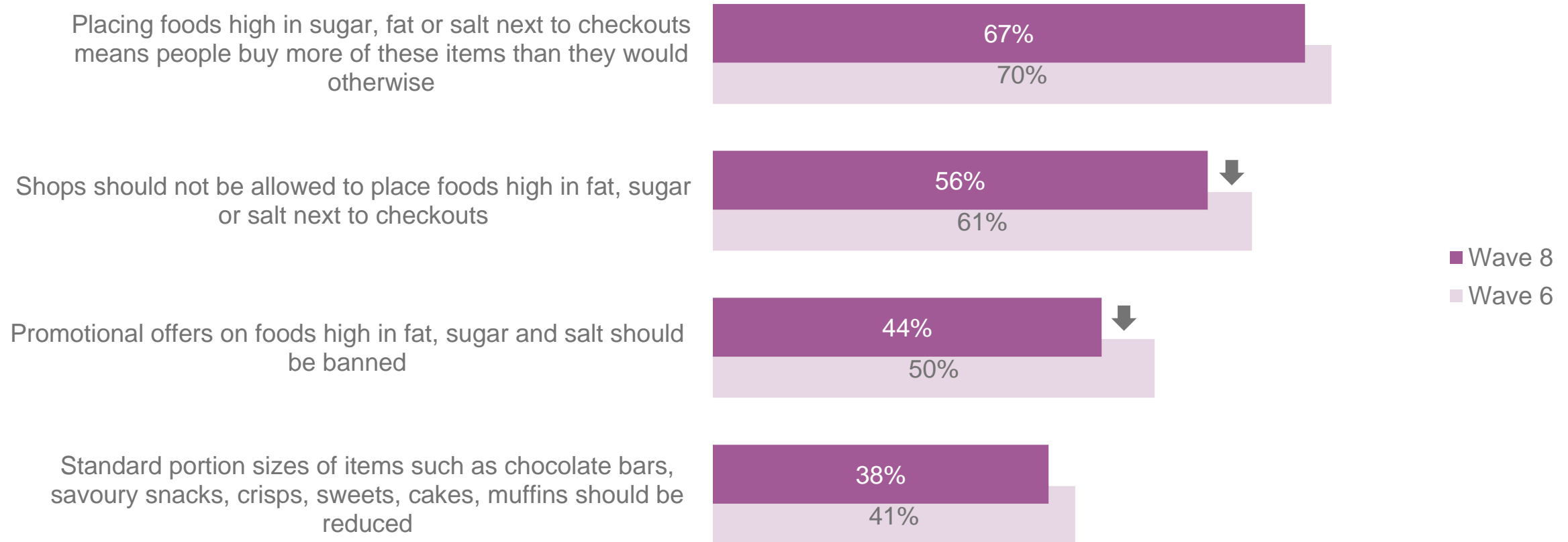


Consumers admit to being influenced by a range of retailer promotions, particularly multi-buys, extra free and price drops. Aisle end displays, upsizing offers and celebrity characters are less influential than in 2018.



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.

% agree



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

Wave 6 = 60%



Sub-Net: Any snack



Chocolate bars and other sweets



Cakes and sweet pastries



Crisps and savoury snacks



Biscuits



Puddings



Savoury pies and pastries



Ice cream



Cereal bars



Other snack



None of these snack foods



Sub-Net: Any drinks



Fizzy or still drinks that are high in sugar



Non-diet Energy drinks



Pure fruit juice



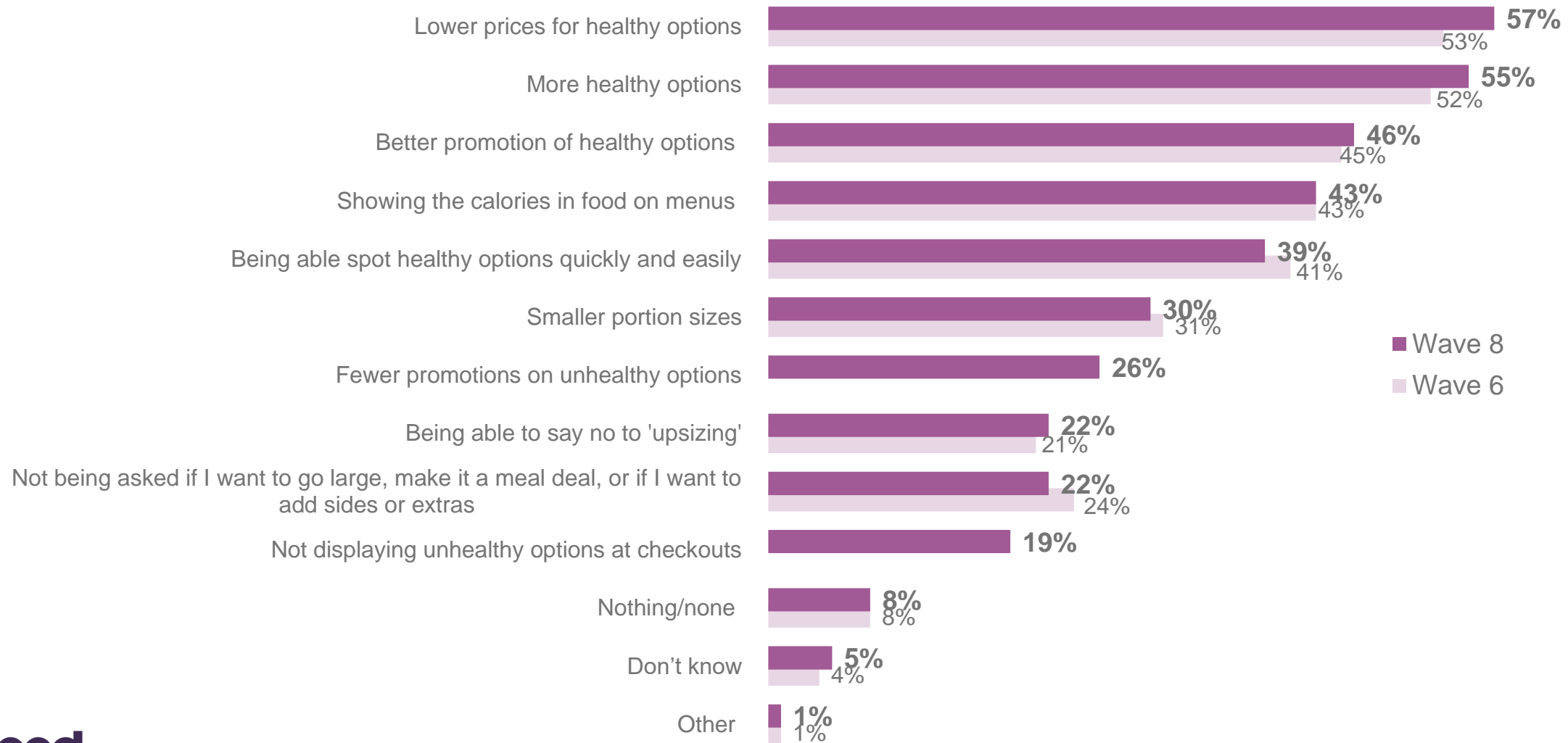
Other drinks



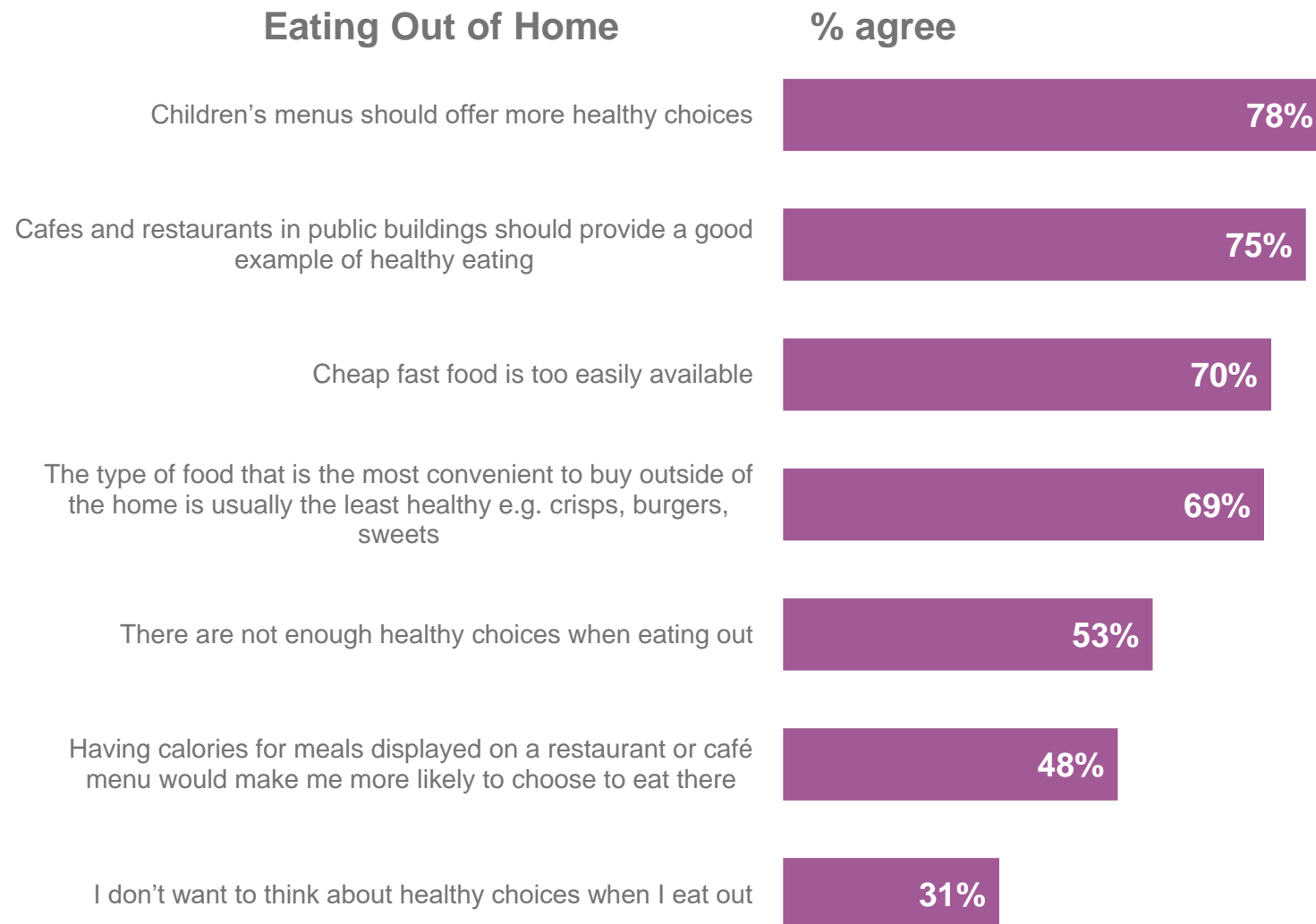
None of these drinks



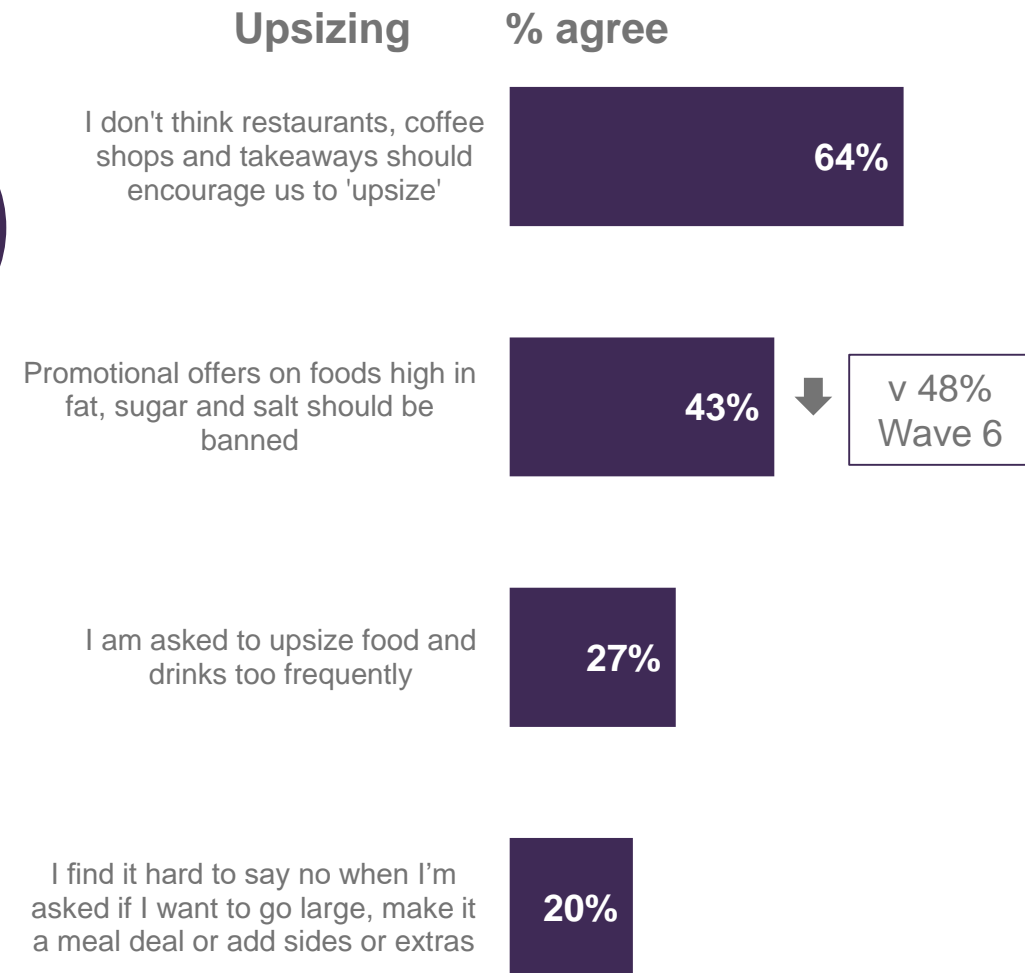
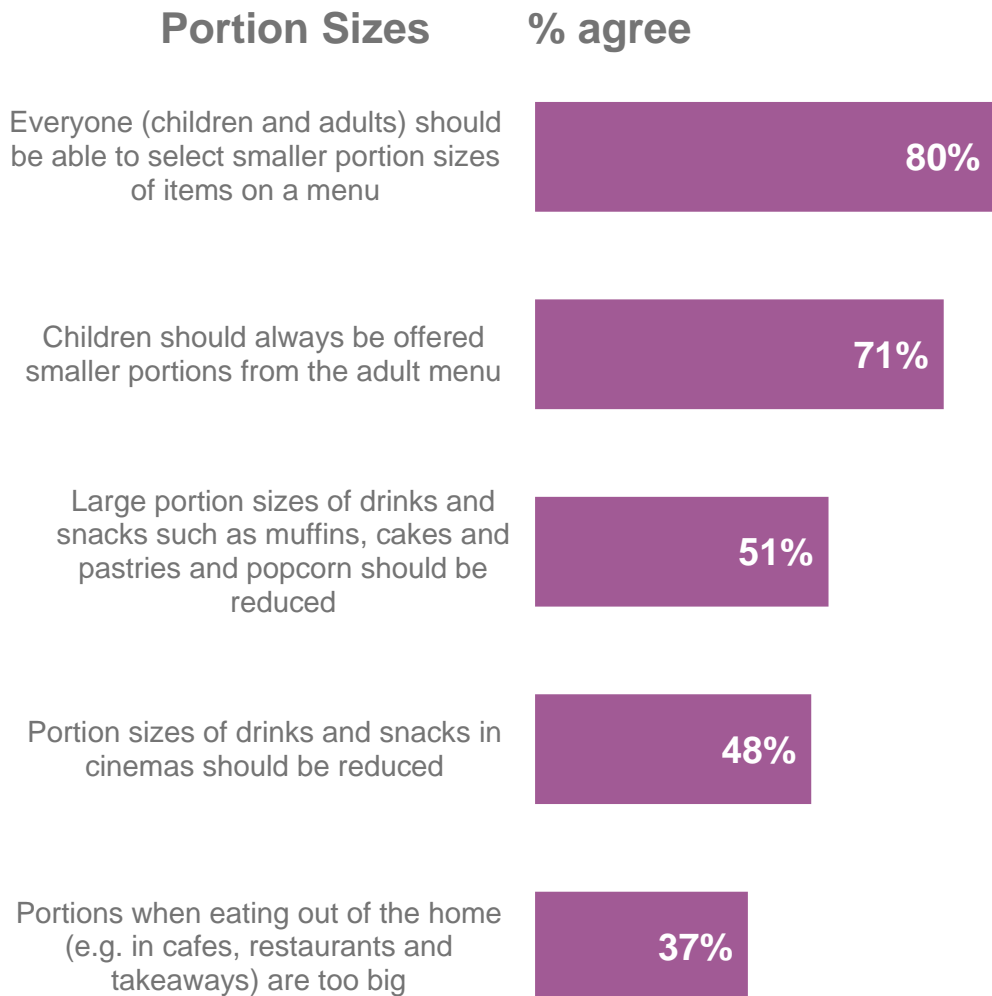
Eating healthily out of home would be easier for consumers if prices were lower, availability of healthy options was greater, and promotion of healthy options was better.



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.



Portion sizes are of concern to consumers when eating out of home. Greater levels of individual choice would be preferred.



7. Allergens

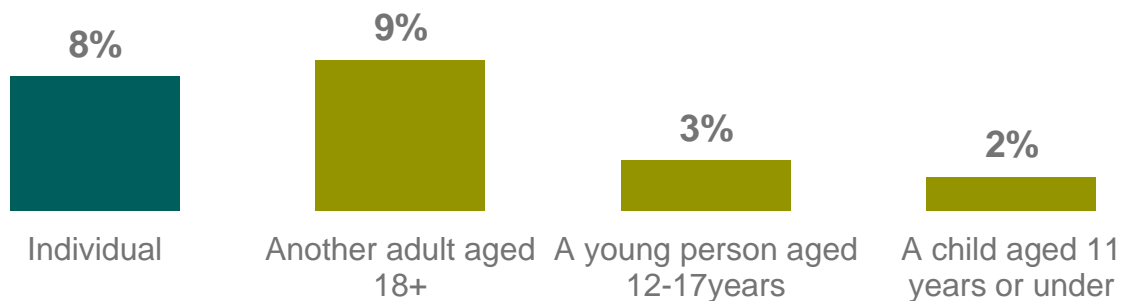
This question set is designed to measure the instance and types of food allergies within Scottish households. In the latest questionnaire, this section was expanded to understand more about attitudes of and towards those with food allergies.

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.

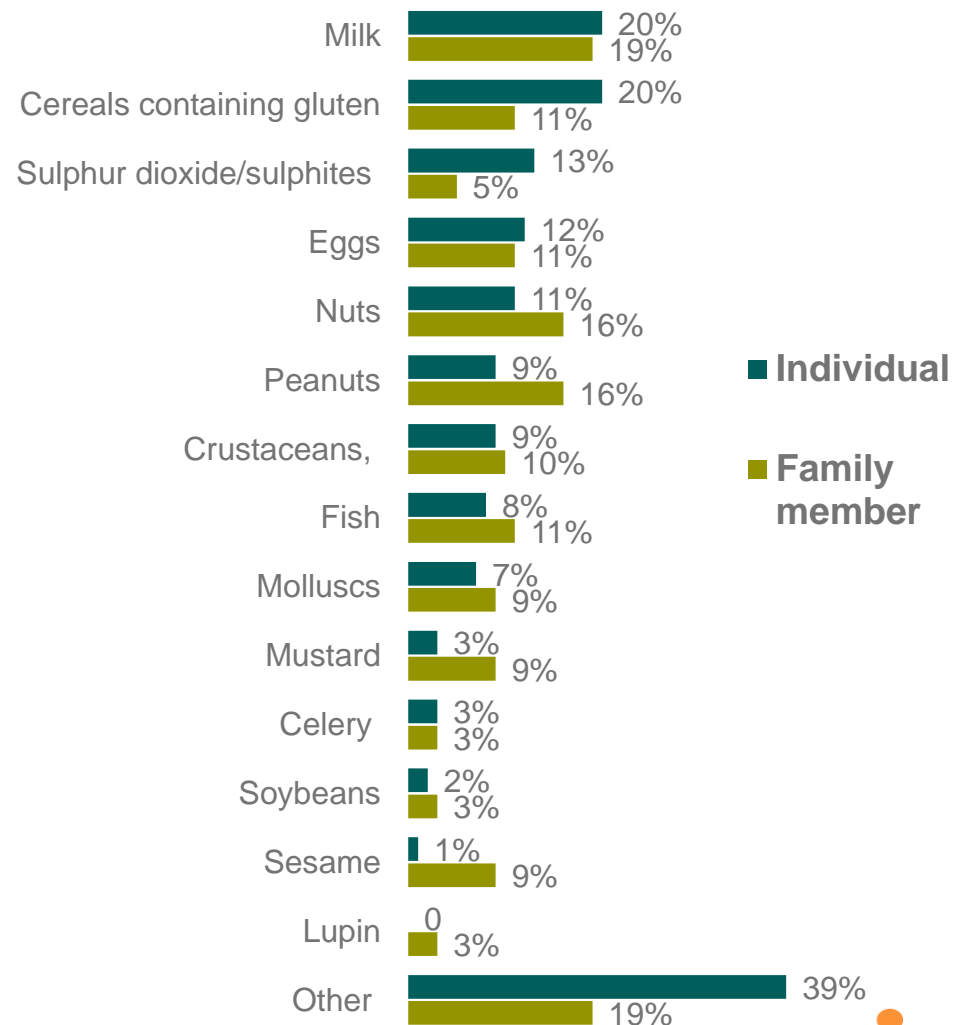


11% of Scottish households include at least one person with a food allergy

Food Allergies in Household

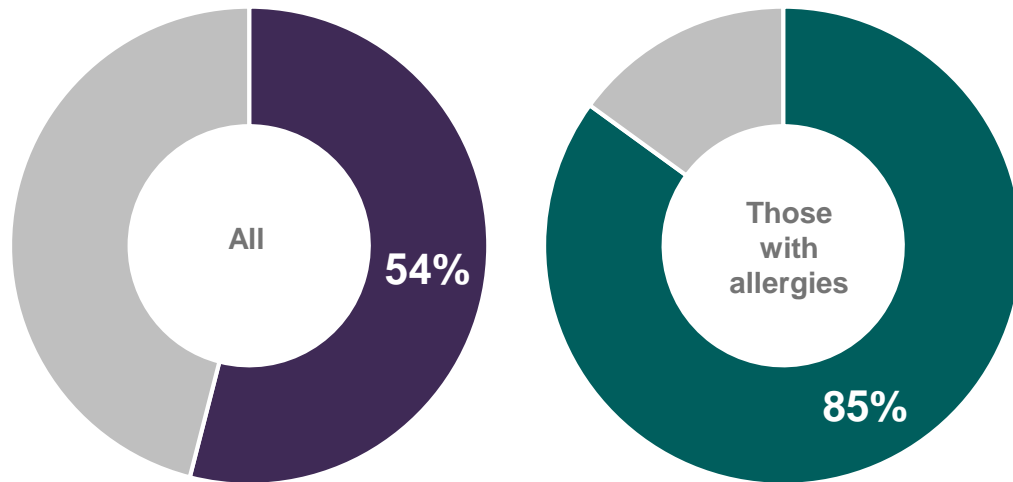


Type of Food Allergy

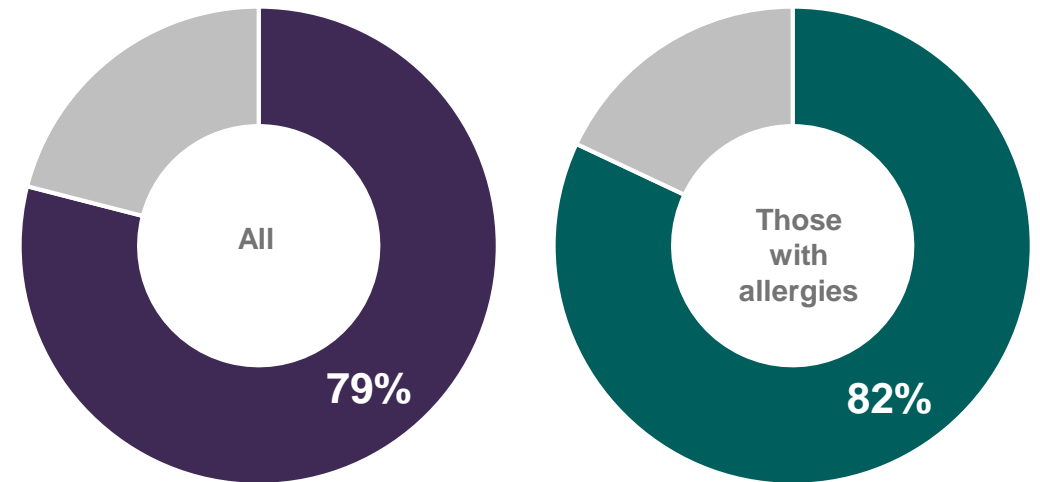


More than 8 in 10 of those with food allergies are concerned about allergens in food, however they largely feel they can access clear information about ingredients in food that may cause an allergic reaction.

Concerned about allergens



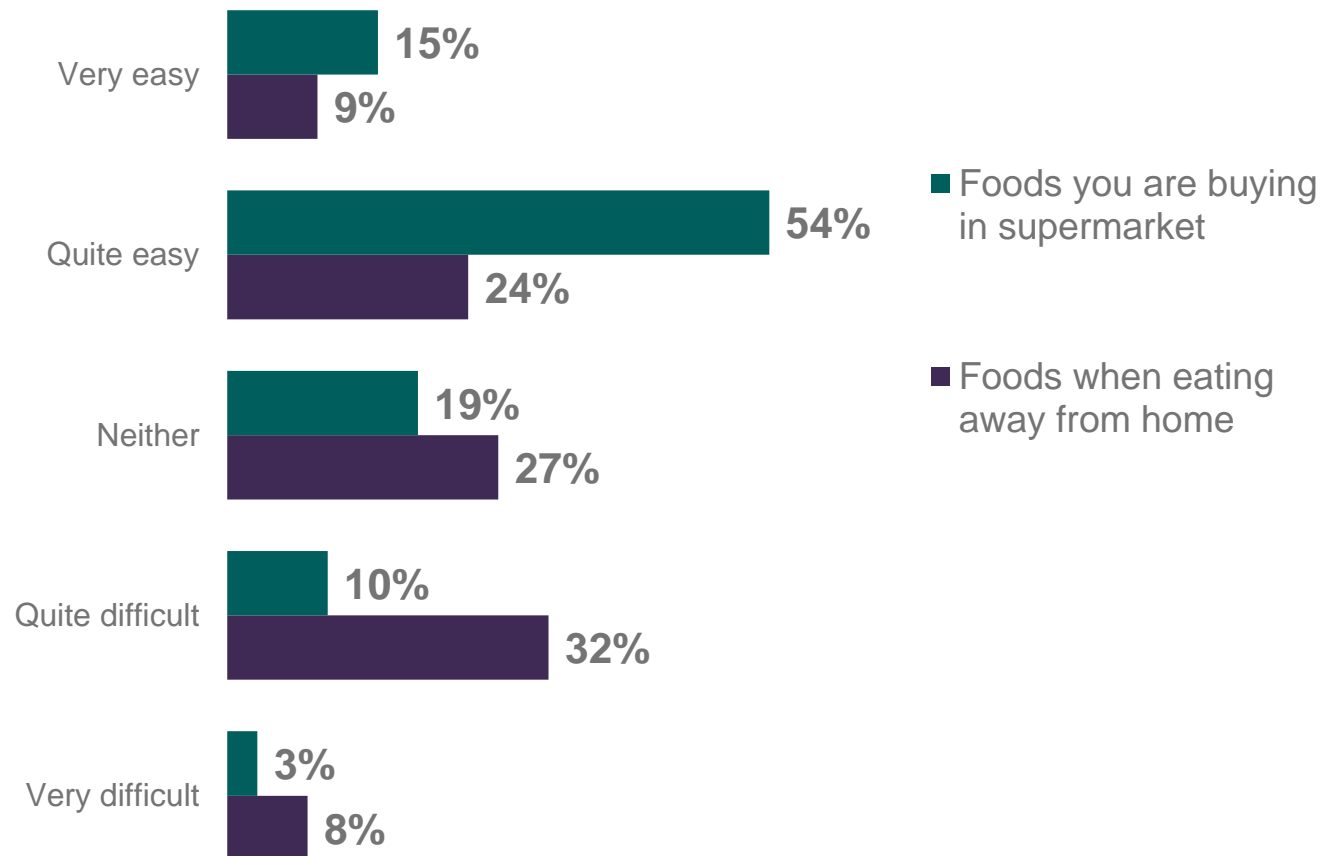
Clear info about ingredients that can cause allergic reactions



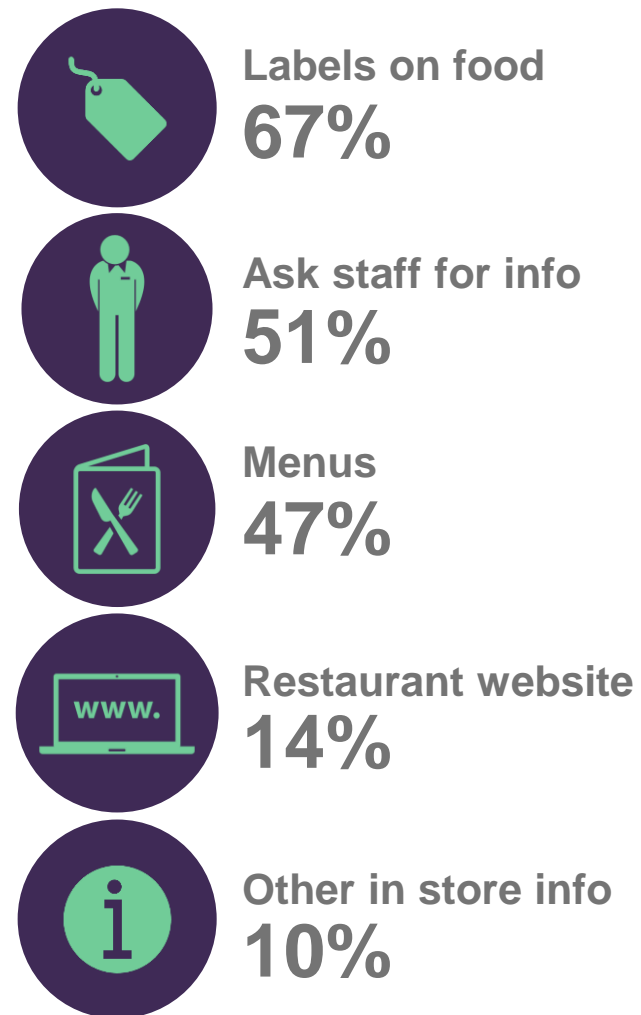
- Over 75s, males and those with no kids at home were most likely to say they did **not** have clear information.

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

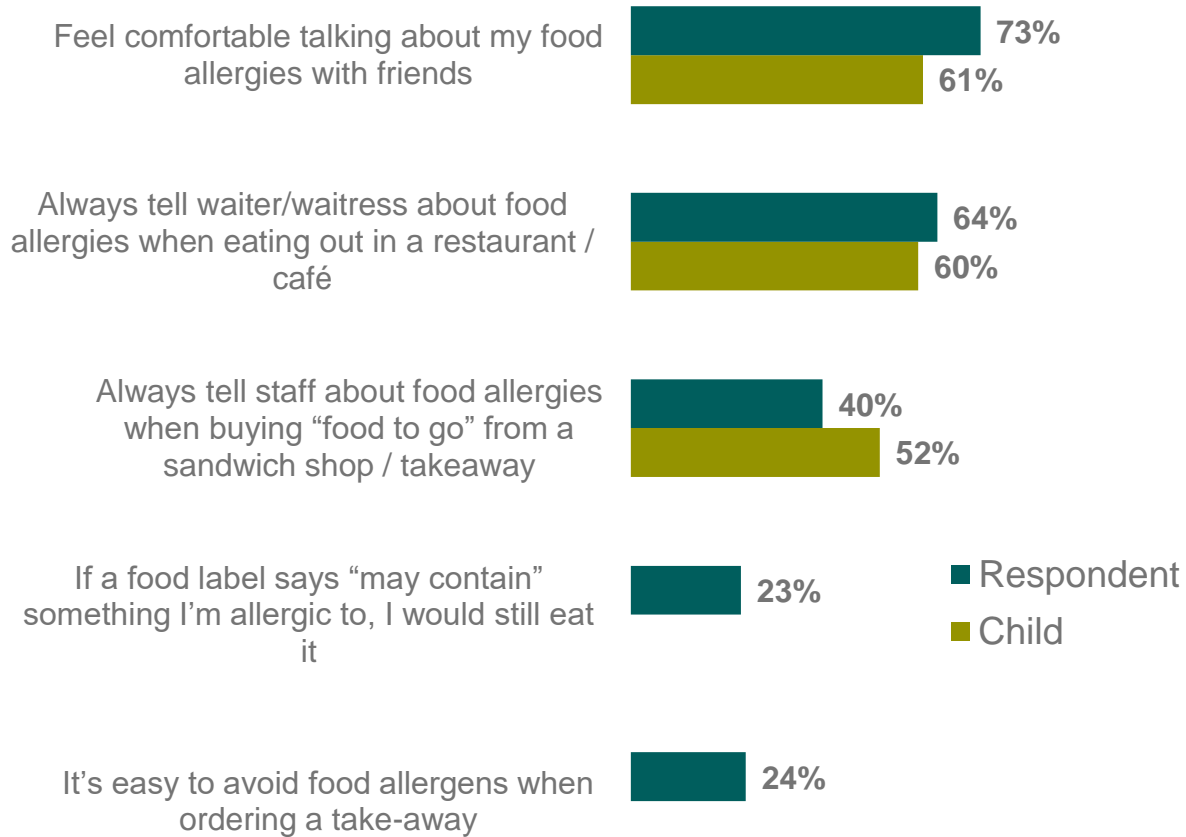


Main Sources of Allergy Info Out of Home

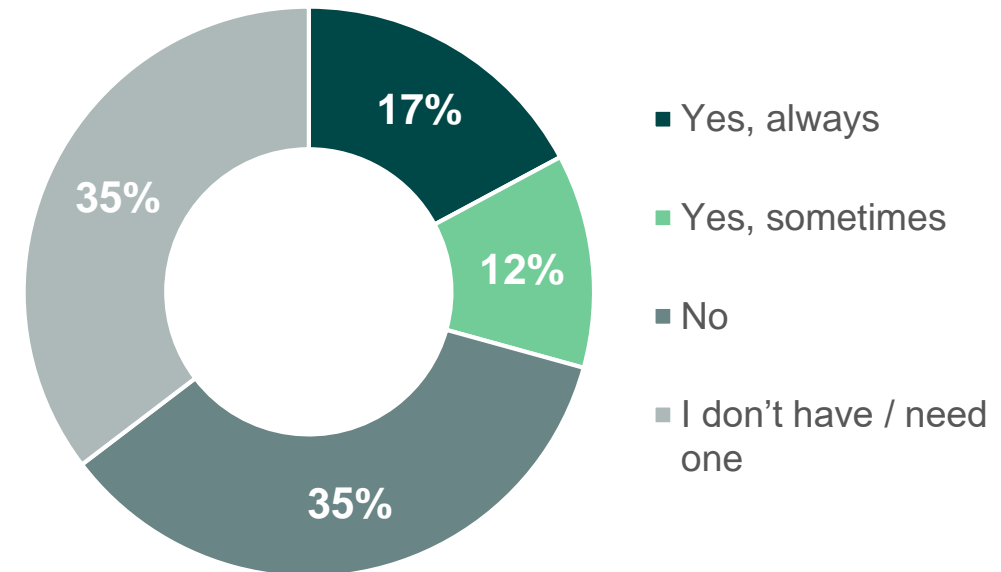


Adults with food allergies are generally comfortable discussing these with friends, whilst young people are slightly less so. Although most mention their allergies when eating out, the practice is by no means universal.

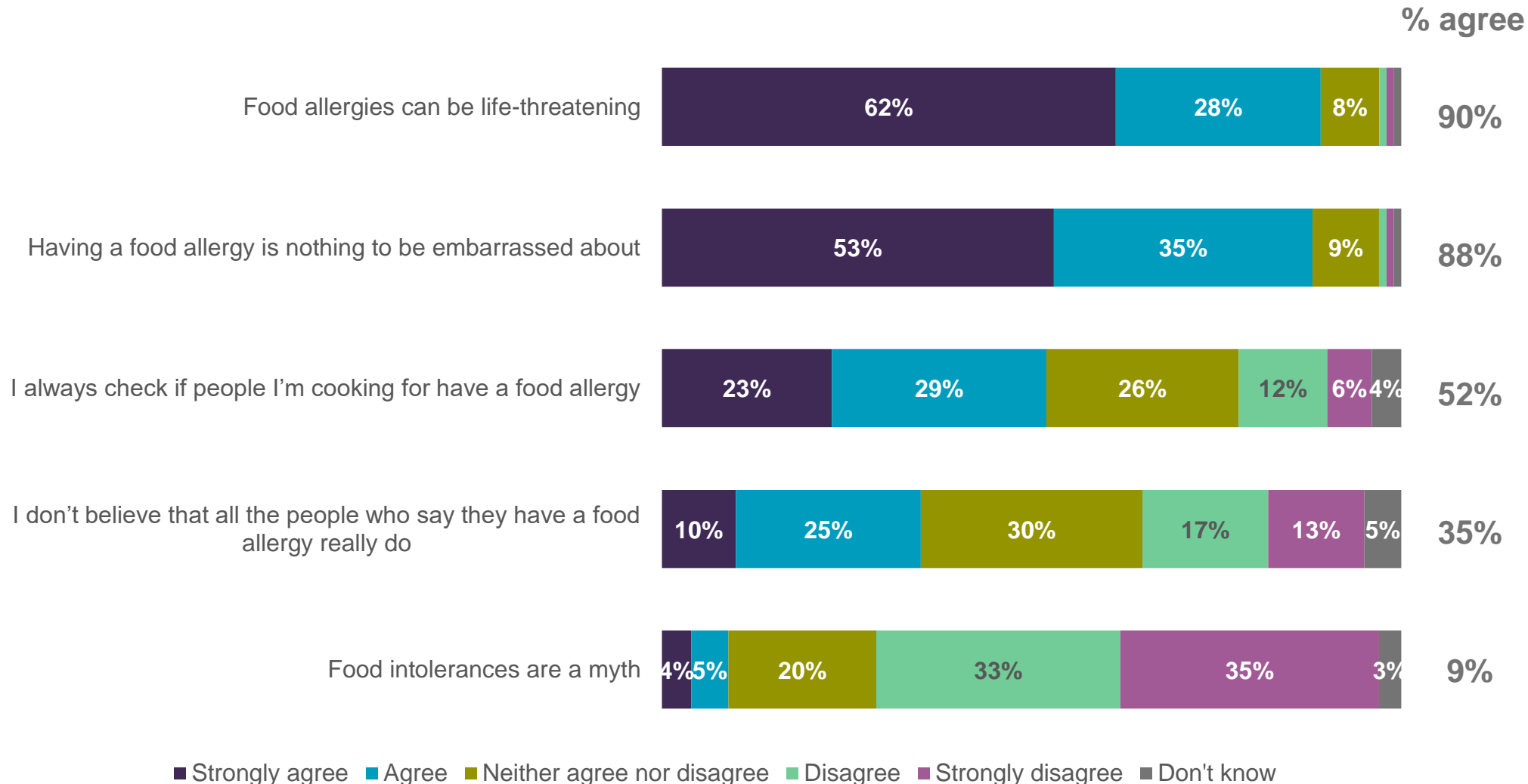
Allergy Behaviours



Carry Epipen / Auto Injector



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.



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



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