

FSS 'No to Upsizing' Campaign Evaluation

Presentation of Results

30 August 2018

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Introduction

How effective has Food Standards Scotland's 'No to Upsizing' Healthy Eating marketing campaign been at raising awareness of the issue of upsizing in the out of home food environment and at empowering consumers to reject these strategies more often?

1. How visible was the campaign among the target audience?

Is the campaign cutting-through / memorable?

Was the campaign seen by the target audience?

How well have the media performed collectively and individually?

2. How effective was the campaign at communicating its key messages and at motivating change?

Has the campaign been able to communicate the key messages?

Is the campaign felt to be motivating?

What has the target audience done as a result?

3. What impact did the campaign have on knowledge and attitudes towards the out of home food environment?

Have perceptions of healthy eating in the out of home food environment changed?

Have attitudes towards upselling and upsizing changed over time?

Do consumers feel more confident in challenging the out of home food environment?

Research was conducted online, pre and post activity, to evaluate the effectiveness of the campaign among the target audience



How?

Interviewing was conducted online using CAWI (Computer Assisted Personal Interviewing), with sample sourced from Kantar TNS' panel partner Lightspeed (and their partners)



Who?

At each wave, we interviewed a sample of women in Scotland aged 16-44 in the C1C2DE social grades:

- 150 interviews were conducted at the pre-wave
- 200 interviews were conducted at the post-wave



When?

Pre-wave interviewing conducted 21 – 31 May 2018 (prior to the activity launching on 1 June);
Post-wave interviewing conducted 2 – 12 July 2018

Weighting

Pre-wave sample weighted by age and by social grade.
Post-wave sample was not weighted as the achieved sample already matched pre-wave.



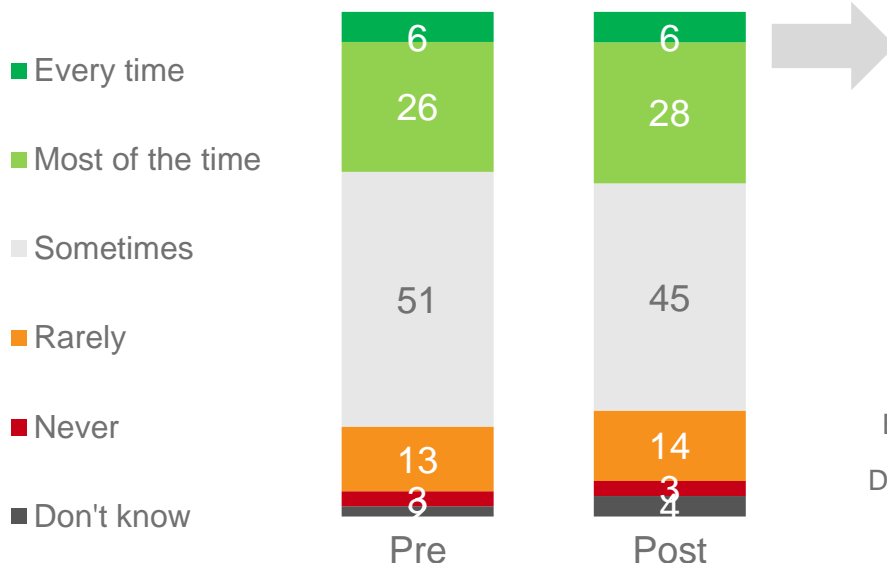
The campaign launched on 1st June, comprising TV, digital and outdoor activity. Four days of field activity were carried out* but not included in the evaluation

Media	Detail	Jun-18										
		14-May	21-May	28-May	04-Jun	11-Jun	18-Jun	25-Jun	02-Jul	09-Jul	16-Jul	
TV												
Broadcast TV	30" STV / C4 Scotland / ITV Breakfast 375 TVRs All adults: 64% 1+ coverage, 5.5OTS 16-34 Women: 52% 1+ coverage, 4.2 OTS C1C2DE: 63% 1+ coverage, 5.7 OTS		Pre-wave fieldwork 21st - 31st May	1st to 30th June					Post-wave fieldwork 1st - 12th July			
Adsmart	2,000,000 Impressions Estimated 80% Coverage @ 4.8 OTS			1st to 30th June								
Broadcaster VOD	STV Player / Sky Media, 350,000 impressions			1st to 30th June								
DIGITAL												
Social, Display & VOD	Facebook, Instagram, Snapchat, YouTube Targeting Female 16-34			1st to 30th June								
OUTDOOR												
Clear Channel Adshell Live	Digital 6 Sheet 17 x D6 Adshell - Glasgow (599,760 Impressions)				4th - 17th June							
JC Decaux	Digital 6 Sheet 24 x Digital 6 Sheet - Princes Street Edinburgh (600,000 impressions)				4th - 17th June							

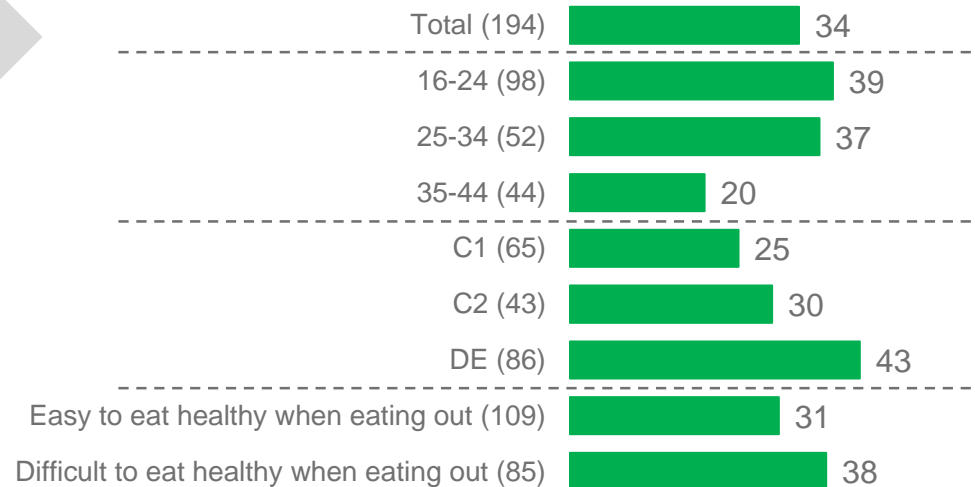
* Dundee, Aberdeen, Dunfermline and Glasgow

Upsizing happens very often for around one third of the target audience, particularly younger / lowest social grades; though many experience it at least 'sometimes', not all perceive it as a frequent occurrence

Frequency of upsizing being offered (%)



% Every/most of the time at post-wave



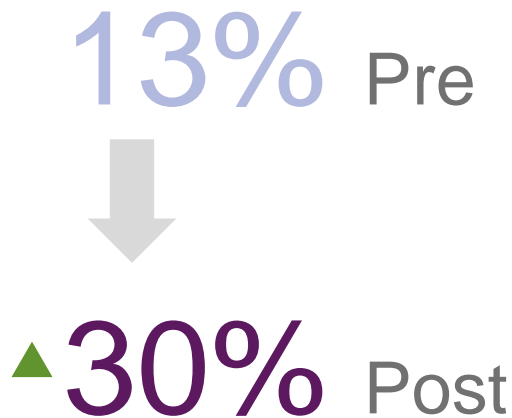
Q013 - FREQ_UPSIZE: How often do you feel you are encouraged to upsize when you are buying food and drink?
Base: All who have experienced upsizing

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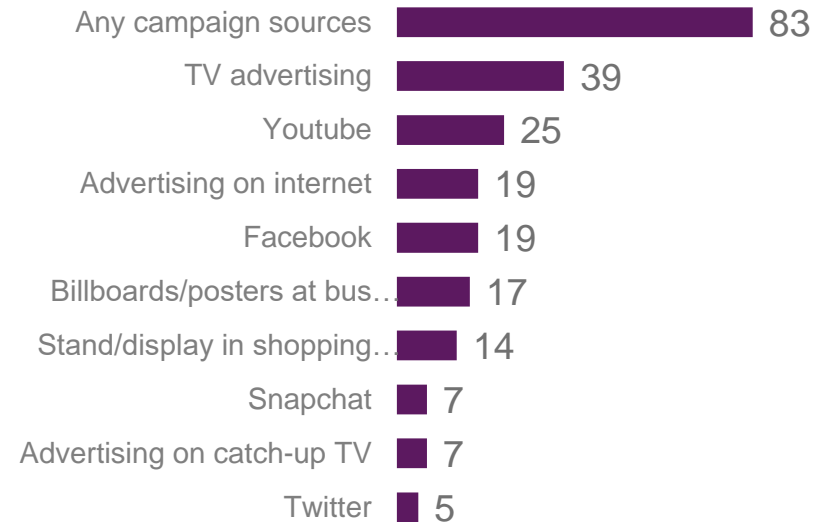
Campaign visibility

Spontaneous awareness of the topic more than doubled over the campaign period. Most awareness stems from campaign sources, with TV advertising the most dominant source, but YouTube also shows strong visibility

Spontaneous awareness of any activity recently about upsizing when eating out



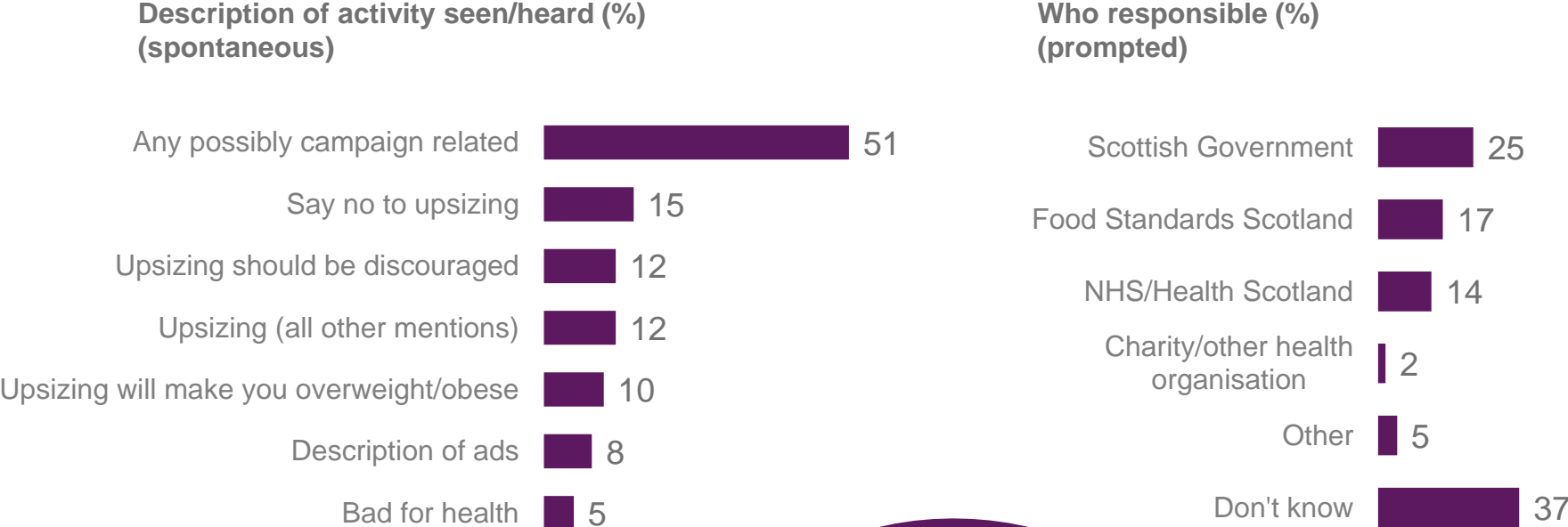
(%) among aware of activity (post-wave)



Q019 – Spontaneous_awareness_1: Have you seen or heard any advertising or publicity/media coverage recently about upsizing when eating out?
 Q020 – Spontaneous_awareness_2: Where did you see or hear this advertising or publicity/media coverage?
 Base: All respondents: Pre (150); Post (200)

▲▼ Significant difference pre to post

There is a good level of cut through, primarily focussing on the need to stop upsizing but a small number mention impact on health; though some are aware of FSS' role, many remain unaware of who was responsible



“Encourages you not to upsize as it’s damaging to your health”

“Very negative against upsizing saying it contributes to people’s poor diets and obesity”

Q021 – Cut_through: Please describe the advertising or publicity/media coverage you have seen or heard about upsizing. What did it show and what did it say?
 Q022 – Branding: Who was responsible for this advertising or publicity?
 Base: All respondents: Post (59)

Results from the latest wave of the FSS tracking also suggest that the campaign (which was live during fieldwork) has cut through more widely across the Scottish population



Q16: Have you seen of heard any advertising recently about any of the following food issues?
 Base: All respondents at wave 4 (1000); Wave 5 (1000); Wave 6 (1002)

Campaign materials played / shown to measure prompted recognition

TV – One ad played in full to each third of sample selected at random

Coffee

Cinema

Fast food



Social media

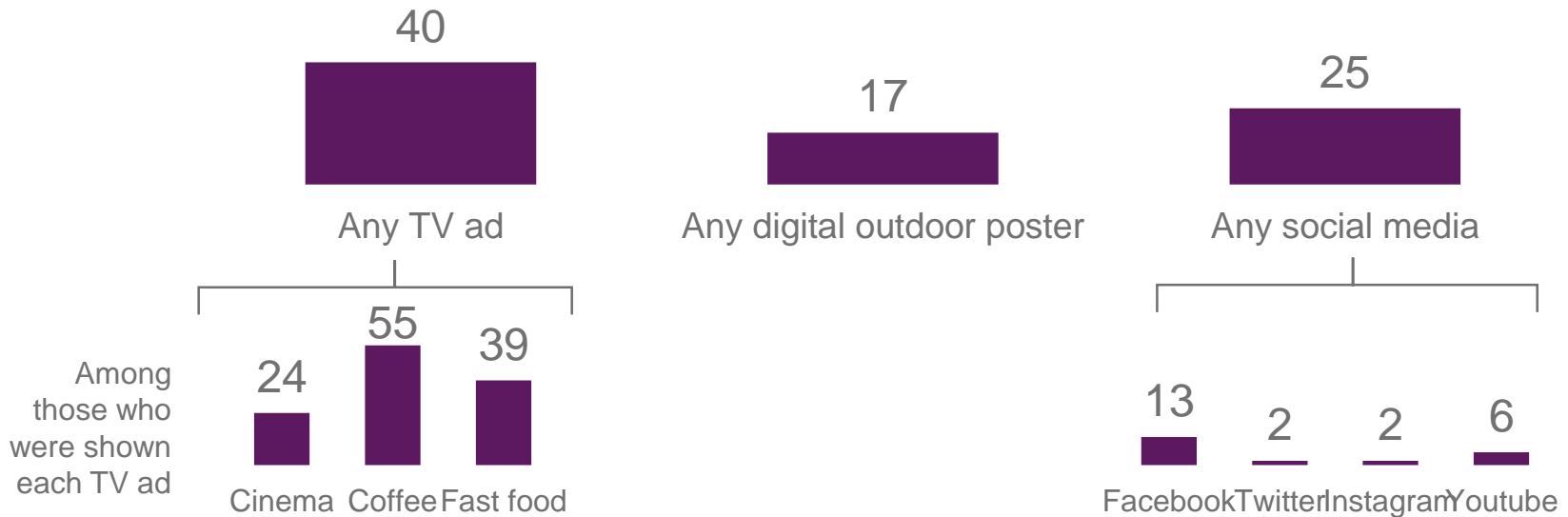


Digital Outdoor Posters



Overall, there is a very good level of campaign and media recognition. Coffee and Fast Food TV ads have higher recognition, perhaps reflecting greater AdSmart use. There may be misattribution of outdoor given limited use

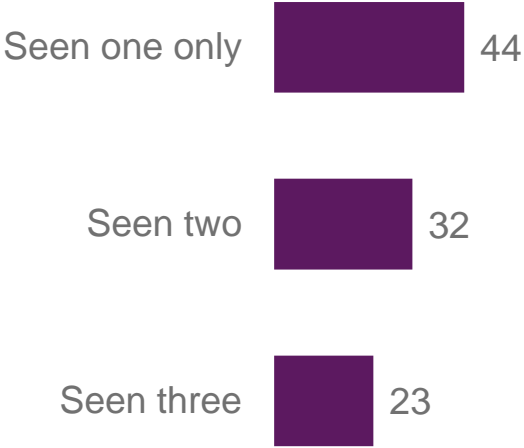
45% *Recognised any element of the campaign*



Q023 – TV_Recognition_2: Have you seen this advert, or a similar advert, recently – either on TV or on catch-up TV?
 Q024 – Print_ad_recognition_2: Have you seen any of these digital posters at bus stops recently?
 Q026 – Social_media_recognition: Have you seen an ad like this on any social media recently?
 Base: All respondents: Post (200)

There is very good multi-media integration with over half of recognisers seeing two or more campaign media, which compares very well to other FSS campaigns

No. of channels seen/heard (%)
(among campaign recognisers)










	Campaign recognition	No of media:	Media	Among Recognisers:	
				Seen One	Seen Two +
No to Upsizing	45	3	TV, digital, outdoor	44	55
Kitchen Crimes	38	2	TV, digital	70	30
Nutrition 2016	46	3	TV, digital, outdoor	65	35
Nutrition 2017	52	2	TV, digital	71	29
Summer 2016	23	3	Digital, outdoor, radio	53	45
Summer 2017	26	3	Digital, outdoor, radio	48	52
Festive 2015	22	2	Digital, outdoor	59	41
Festive 2016	16	2	Digital, outdoor	51	49

Q023 – TV_Recognition_2: Have you seen this advert, or a similar advert, recently – either on TV or on catch-up TV?
 Q024 – Print_ad_recognition_2: Have you seen any of these digital posters at bus stops recently?
 Q026 – Social_media_recognition: Have you seen an ad like this on any social media recently?
 Base: All respondents: Post (200)

Encouragingly, the campaign has been most effective in reaching those who find it difficult to refuse upsizing, with social media driving this. Recognition is also higher among the youngest age group, for whom social is also important

Campaign recognition by sub groups (%)

		TV	Outdoor posters	Social media	Seen/heard 2+
Total (200)		40	17	25	26
16-24 (100)		43	20	34 ▲	34 ▲
25-44 (100)		36	13	15	16
Easy to refuse upsizing (161)		39	16	20	22
Difficult to refuse upsizing (39)		44	21	41 ▲	36
Easy to eat healthy when eating out (111)		41	22 ▲	27	29
Difficult to eat healthy when eating out (89)		38	10	21	20

No differences by social grade except slightly higher social media recognition among C1C2s (28% vs. 20% DEs)

▲ Significant difference

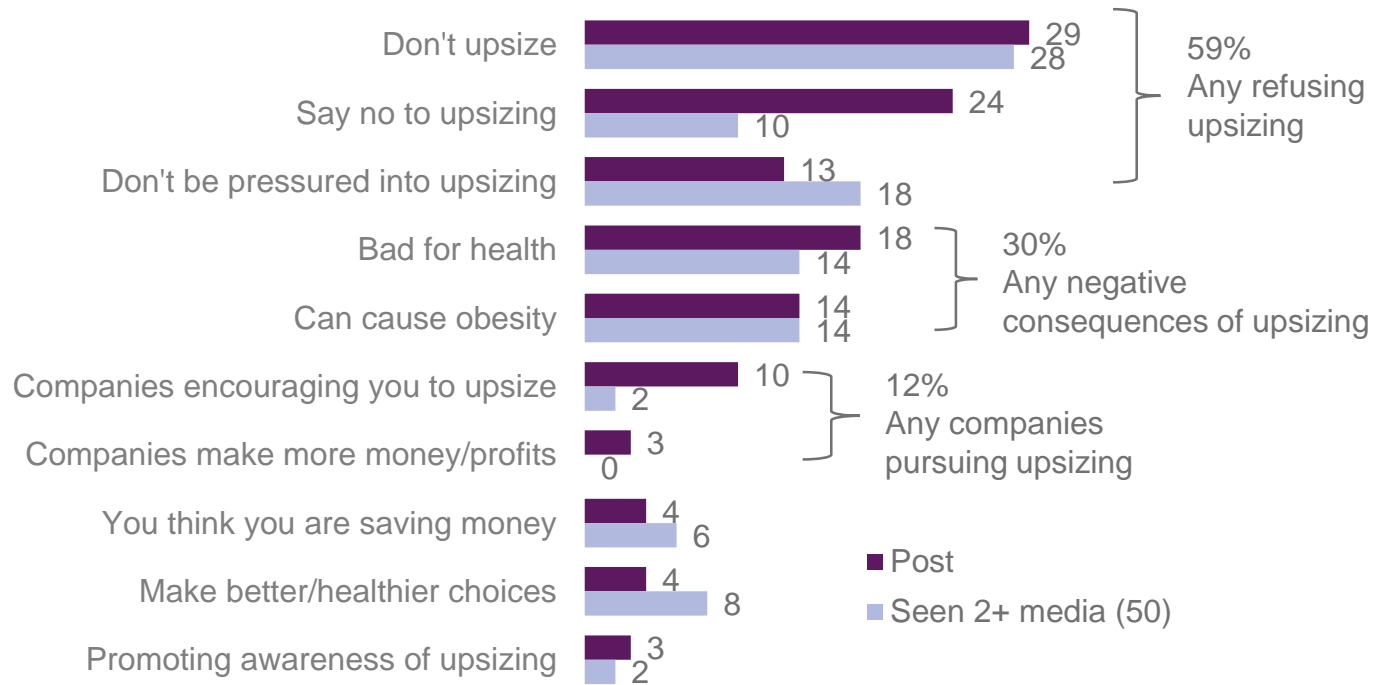
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Effectiveness of communication and messaging

The main theme of refusing to upsize meals is clearly communicated, and multi-media impact is evident in terms of health messaging. With no spontaneous mentions of “visit the website”, this could be strengthened

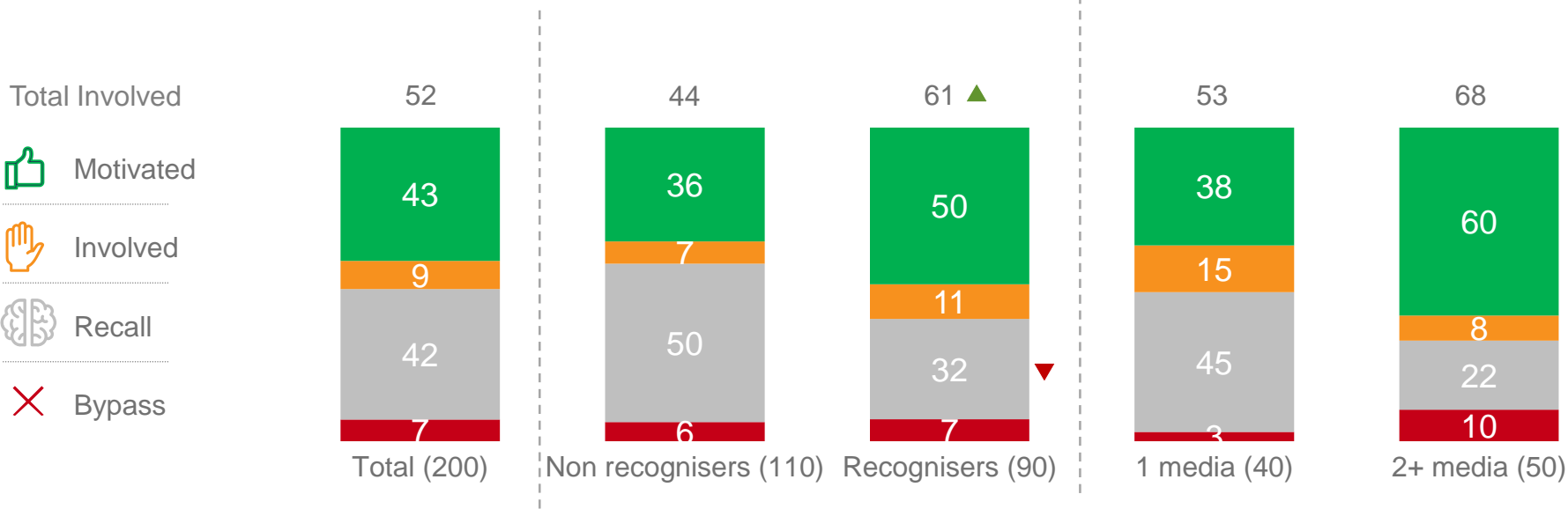
Spontaneous (%)



Q027 – Main_message: Thinking about all the advertising you have just seen and heard, what do you think are the main messages of this advertising? What is it telling you about the topic and what is it saying to people?
 Base: All respondents: Post (200)

The campaign has recorded a good level of motivation and there is evidence of multi-media impact; however, there is a degree of polarisation which means motivation is lower than has been the case for other FSS campaigns

Short-term impact by sub group (%)



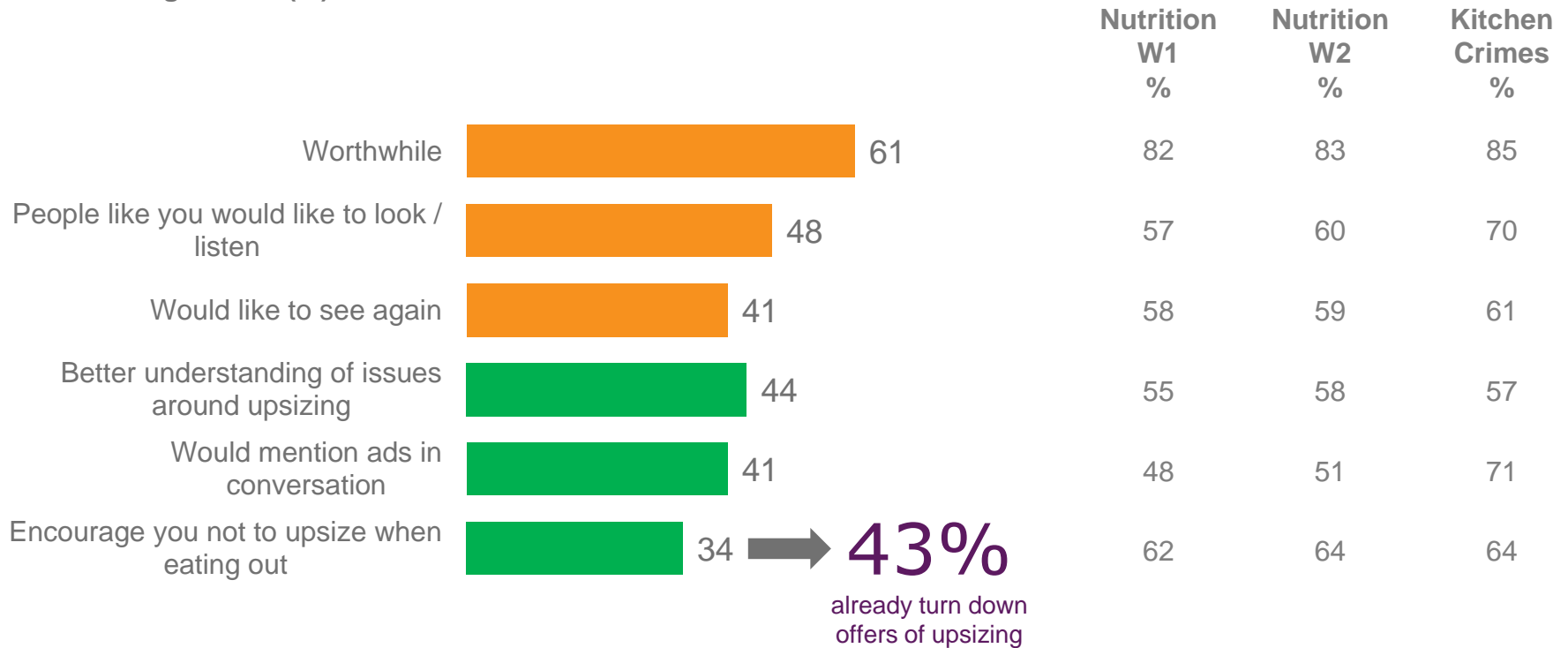
Motivation for other FSS campaigns:
 Nutrition W1 = 57% (63% total involvement)
 Nutrition W2 = 57% (65% total involvement) (70% among recognisers)
 Kitchen Crimes = 66% (72% total involvement)

▲ ▼ Significant difference pre to post

Q029-Q34: AdEval questions
 Base: All respondents in each sub-group

The individual AdEval measures suggest the campaign was not perceived as positively as previous campaigns, potentially reflecting the more limited experience of upsizing / lower concern around this than previous topics

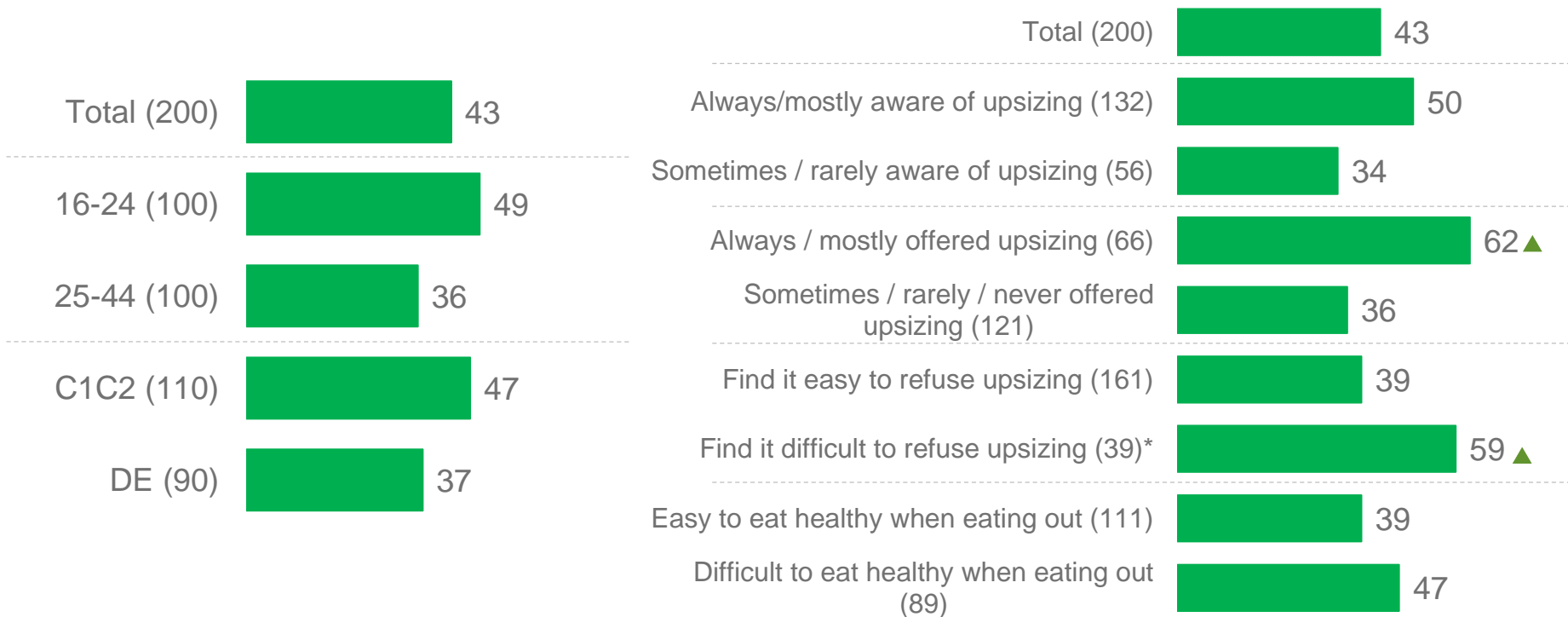
AdEval diagnostics (%)



Q029-Q34: AdEval questions
Base: All respondents: Post (200)

However, as well as motivation being higher among those groups with greater recognition (16-24s and C1C2s), the campaign has been very effective in motivating those groups who need it most

Short-term impact by sub group (% Motivated)

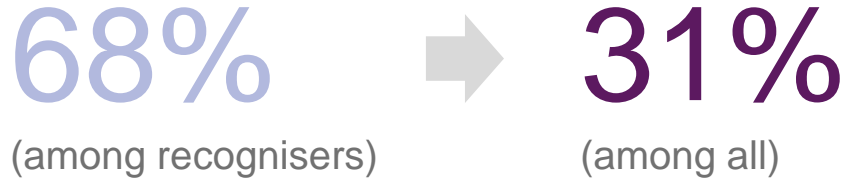


Q029-Q34: AdEval questions
Base: All respondents in each sub-group

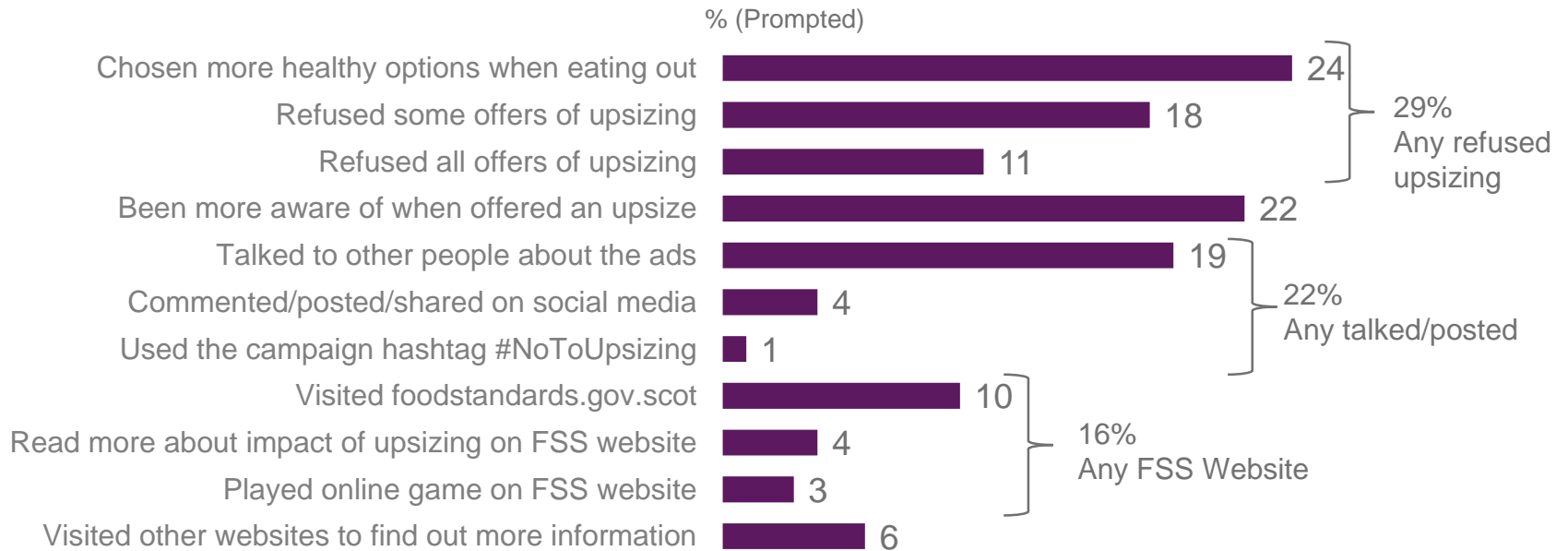
*CAUTION: Small Base

The campaign has generated a very good level of action taken among recognisers, with refusing upsizing the most popular action

Taken any action

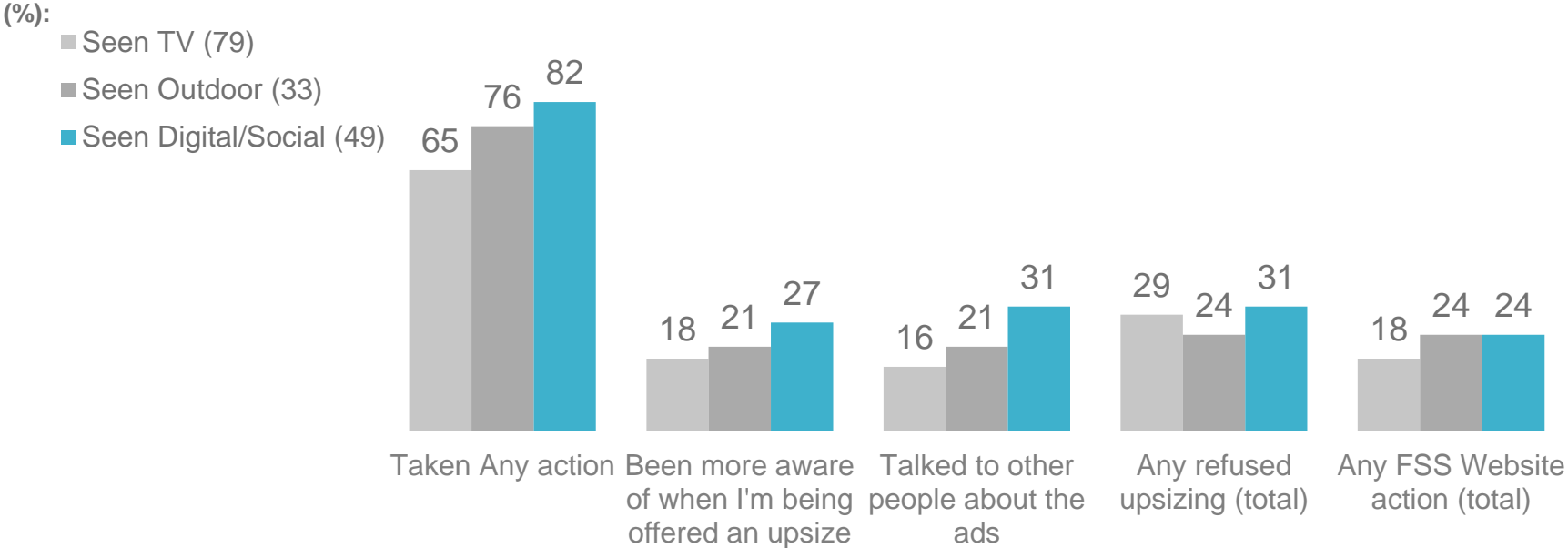


Page views of the #NoToUpsizing game: 14,374
 Visits to the campaign landing page: 14,199



Q028 – Action_taken_1: Thinking about the advertising you said you have seen or heard, what, if anything, have you done as a result of this advertising?
 Base: All who have seen or heard advertising: Post (90)

Those seeing digital/social are helping to drive the multi-media impact on action taken, particularly in terms of being more aware of upsizing and in generating Word of Mouth



Q028 – Action_taken_1: Thinking about the advertising you said you have seen or heard, what, if anything, have you done as a result of this advertising?
 Base: All who have seen or heard advertising: Post (90)

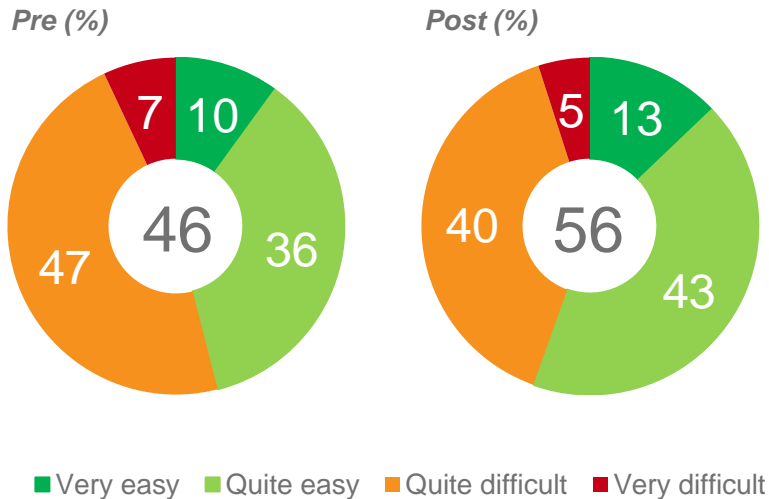
▲▼ Significant difference pre to post

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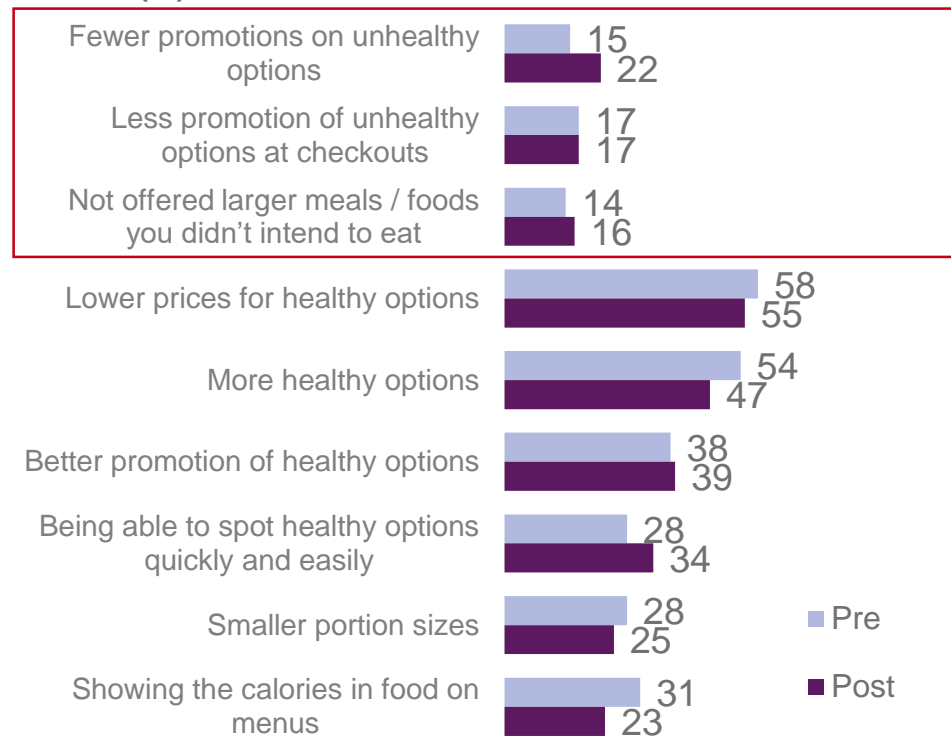
Impact and behaviour change

The target audience see eating healthily outside the home as easier since the launch of the campaign, and there is a small increase in desire to see some of the changes discussed in the campaign to make it easier still

Ease of eating healthily outside the home



Changes to make it easier to eat healthily outside the home (%)



Q006 - EASE_OUT: How easy or difficult is it for you to eat healthily outside the home, for example, when you're in a cafe, restaurant or fast food outlet?
 Q007 - IMPROVE: Which, if any, of the following would make it easier for you to eat healthily outside the home?
 Base: All respondents: Pre (150); Post (200)

▲ ▼ Significant difference pre to post

Awareness and understanding of the terms 'upsizing' and 'upselling' has increased since the ads aired

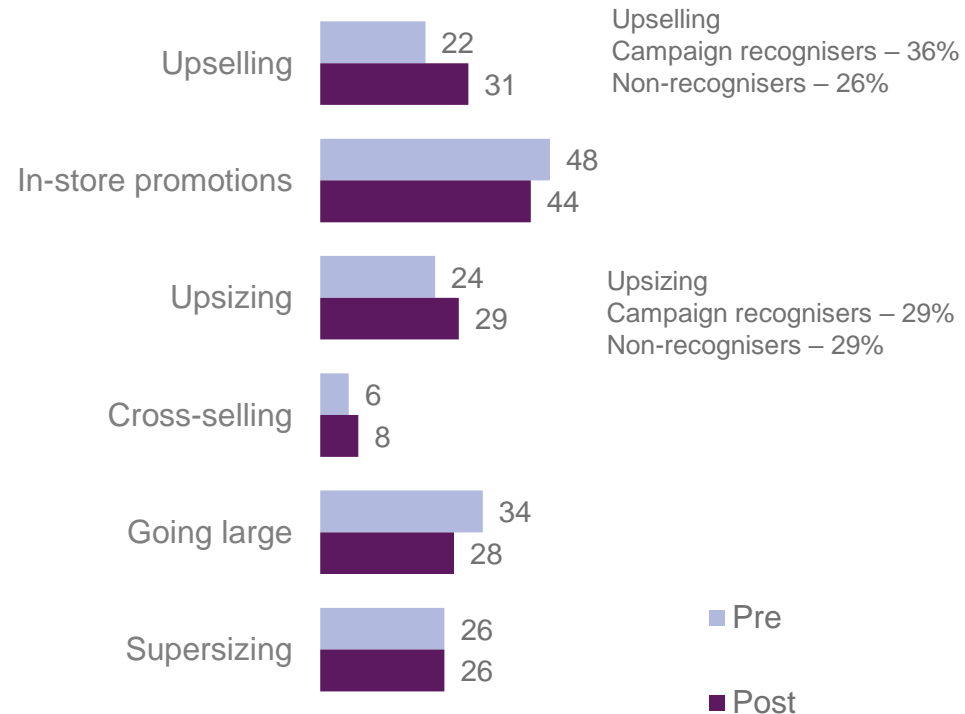
Aware of the term 'Upsizing' to describe these ways of encouraging you to buy more or bigger food or drink items

24% Pre



29% Post

Use of other terms to describe buying bigger food/drink (%)

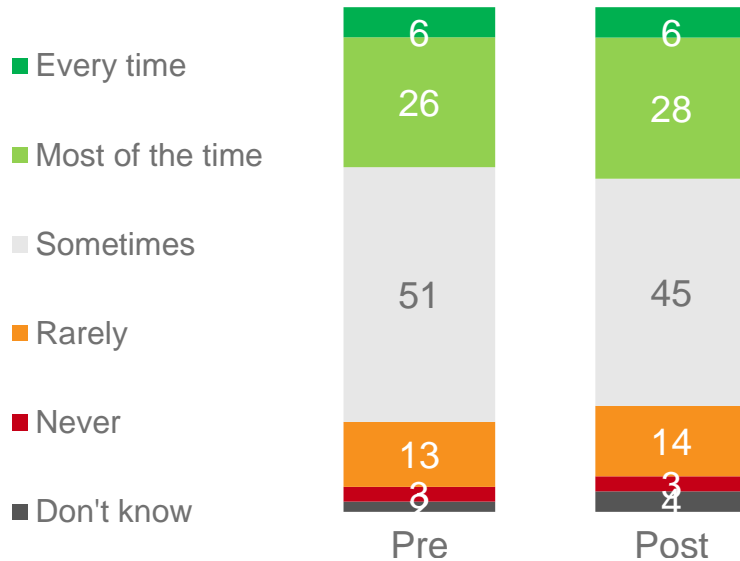


Q009 - UPSIZE_AWARE: Which of these best describes these different ways of encouraging you to buy more or bigger food or drink items?
 Base: All respondents: Pre (150); Post (200)

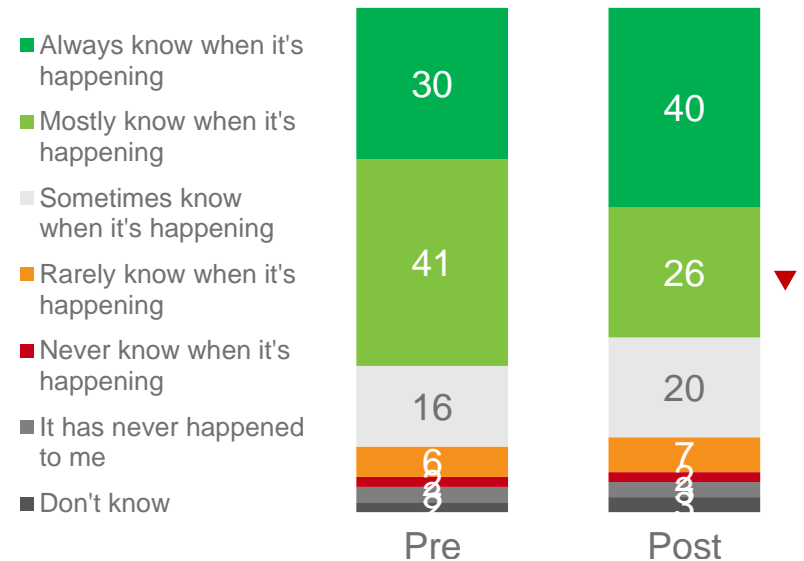
▲ Significant difference pre to post

Since the campaign aired, the claimed frequency of upsizing being offered has remained fairly similar; however, there has been an increase in those who are always aware when they are being offered an upsized option

Frequency of upsizing being offered (%)



Awareness of upsizing being offered (%)

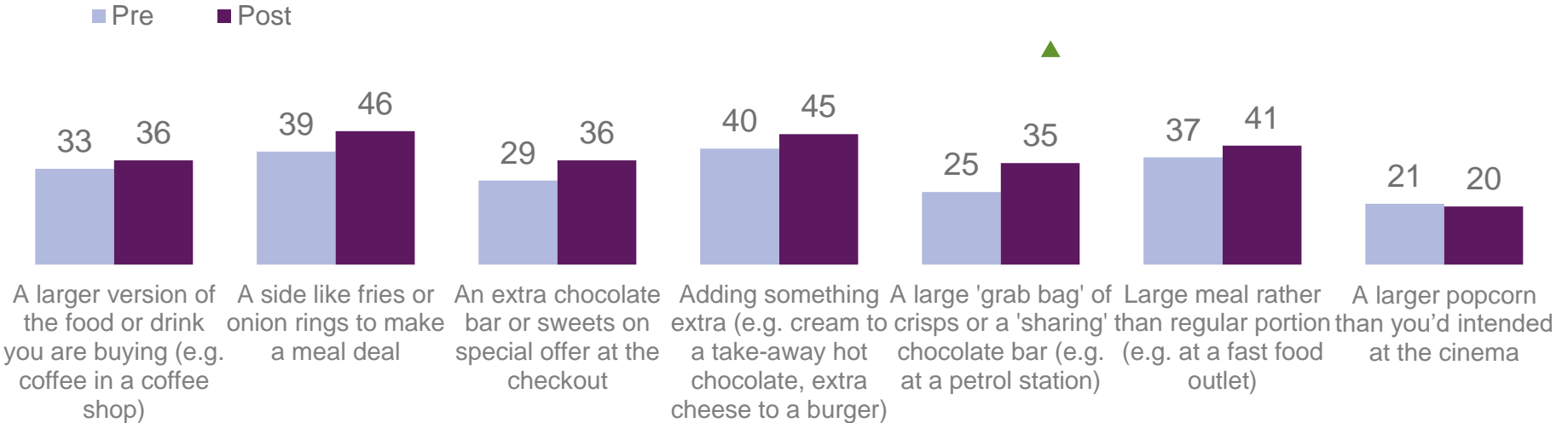


Q013 - FREQ_UPSIZE: How often do you feel you are encouraged to upsize when you are buying food and drink?
 Q012 - UPSIZEREC: Are you aware of when you are being encouraged to upsize?
 Base: All respondents: Pre (150); Post (200)

▲▼ Significant difference pre to post

Increases in awareness of the term and of upsizing being offered is also reflected in higher claimed experience of upsizing across almost all areas, with some evidence of the campaign themes being more noticed

Recently offered (%):



Larger version of food or drink

Campaign recognisers – 42%

Non-recognisers – 30%

Larger popcorn at cinema

Campaign recognisers – 23%

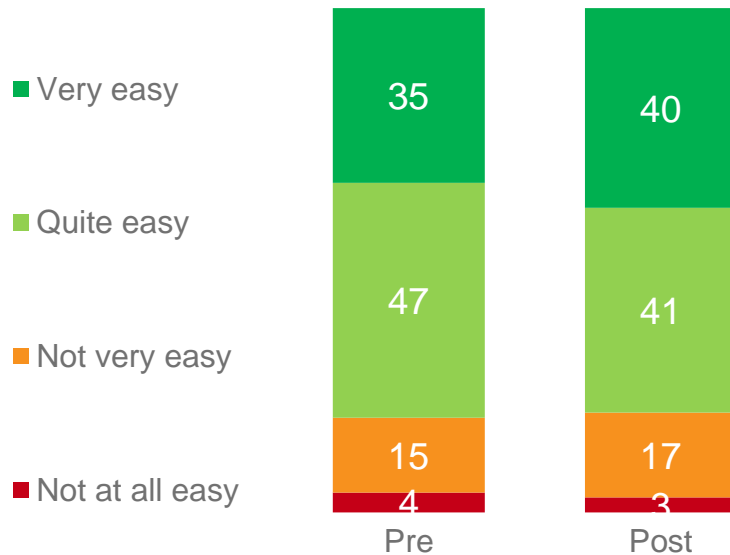
Non-recognisers – 17%

Q008 - UPSIZE_EXP: Which of these have you been offered recently when buying food or drink?
Base: All respondents: Pre (150); Post (200)

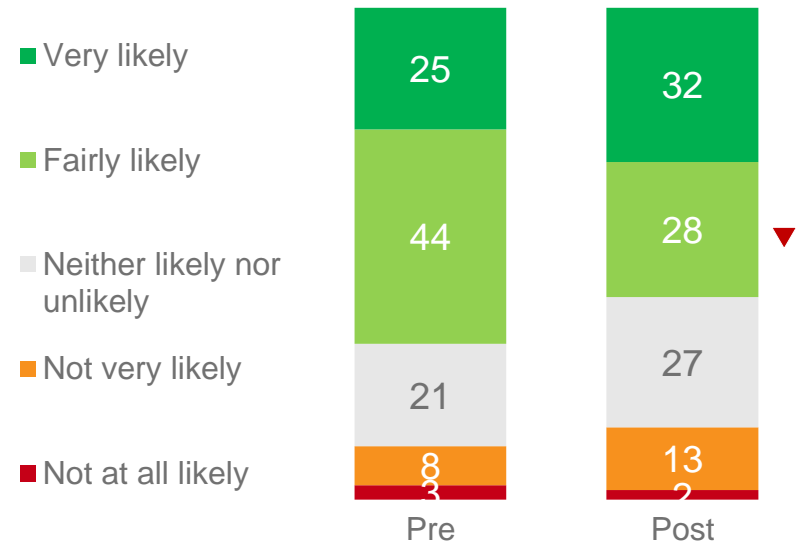
▲▼ Significant difference pre to post

Encouragingly, the proportion who find it very easy to refuse an offer to upsize and who are very likely to say 'no thanks' have both increased

Ease of saying 'no thanks' (%)



Likelihood of saying 'no thanks' (%)



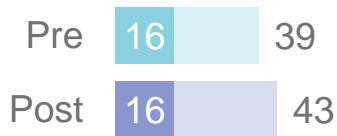
Q015 - EASEREFUSE: How easy is it to say 'no thanks' when you are being encouraged to upsize?
 Q016 - LIKELYREFUSE: How likely are you to say 'no thanks' when you're being encouraged to upsize?
 Base: All respondents: Pre (150); Post (200)

▲ ▼ Significant difference pre to post

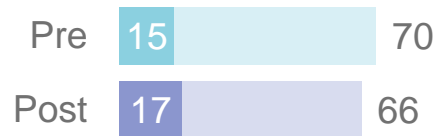
Of the attitude statements where there are changes over the campaign period, there are positive movements away from needing to upsize frequently, but less association overall between upsizing and Scots being overweight

% **Agree** strongly / Agree total

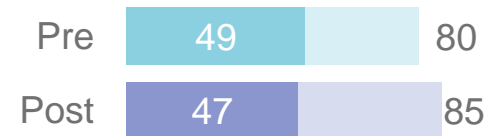
The Government should stop companies upsizing and upselling unhealthy food



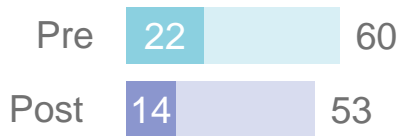
It's OK to upsize now and again



We don't need to upsize all of the time



Upsizing is a problem in Scotland because too many people are overweight



Decline in agreement (and increase in disagreement from 12% to 17%) driven by groups less likely to see campaign – 25-44s, DEs

I don't want to think about healthy choices when I'm buying food on the go (or when I'm out)



All attitude statements available in Appendix

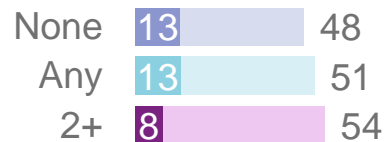
Q18 – UPSIZEAT; Here are some statements other people have made about upsizing. Please indicate how much you agree or disagree with each one?
Base: All respondents: Pre (150); Post (200)

▲ ▼ Significant difference pre to post

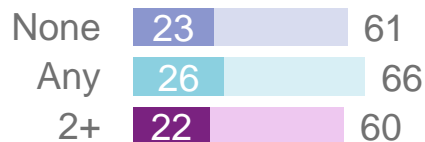
However, there is evidence that the campaign has built more of an association between upsizing and obesity; those seeing multiple campaign media are also more likely to support other actions/restrictions

% Agree strongly / Agree total

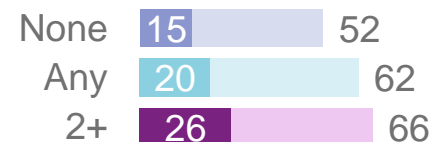
I don't think restaurants, coffee shops and takeaways should encourage us to 'upsize'



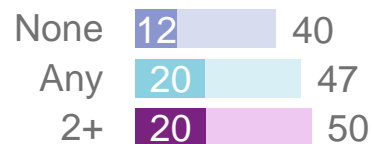
Companies should encourage us to buy more healthy foods and stop trying to sell us unhealthy food



Companies should limit the amount of upsizing they offer to improve people's health



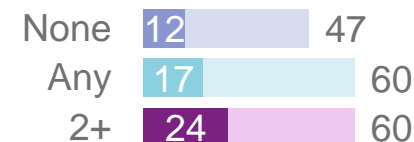
The Government should stop companies upsizing and upselling unhealthy food



I often go large, buy meals deals and add extra and sides when I'm eating out



Upsizing is a problem in Scotland because too many people are overweight

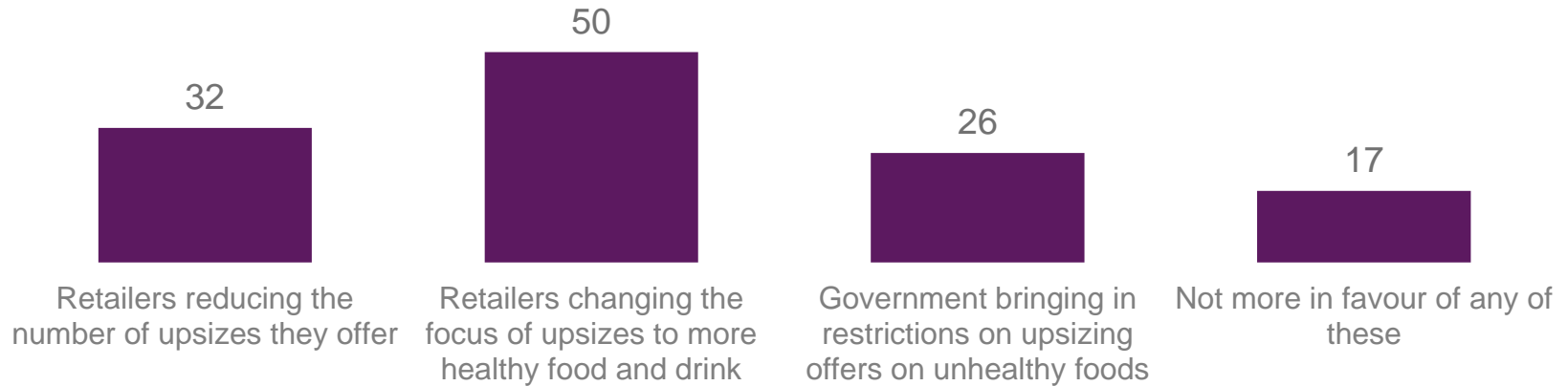


Q18 – UPSIZEAT; Here are some statements other people have made about upsizing. Please indicate how much you agree or disagree with each one?
Base: All respondents: Any (90); None (110); 2+ (50)

All attitude statements available in Appendix

Consumers are most in favour of retailers themselves taking action on upsizing (particularly on switching this to healthier products), rather than government restrictions, though one quarter are in favour of this

View on the future of upsizing (Post)(%):



Q36 – AdSupport; Having seen this advertising, which, if any, are you more in favour of?
Base: All respondents: Pre (150); Post (200)

▲ ▼ Significant difference pre to post