



Food in Scotland Consumer Tracking Survey Wave 16

Presentation of Results

Aug 2023



Background

- 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 and has been updated in line with the new strategic plan
- 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 topical question modules.
- The survey was set up by Kantar TNS who conducted Waves 1 – 6.
- JRS research consortium has been running the survey from Wave 7 onwards.
- This document outlines key findings from Wave 16 (diet & nutrition).
- Statistically significant differences (at 95% confidence level) compared with the previous relevant wave are highlighted with 

Methodology



- The research methodology is consistent across research waves to ensure comparability



Online self-completion survey



Representative sample of
1,017 Scottish adults



25mins questionnaire length



4th – 13th July 2023

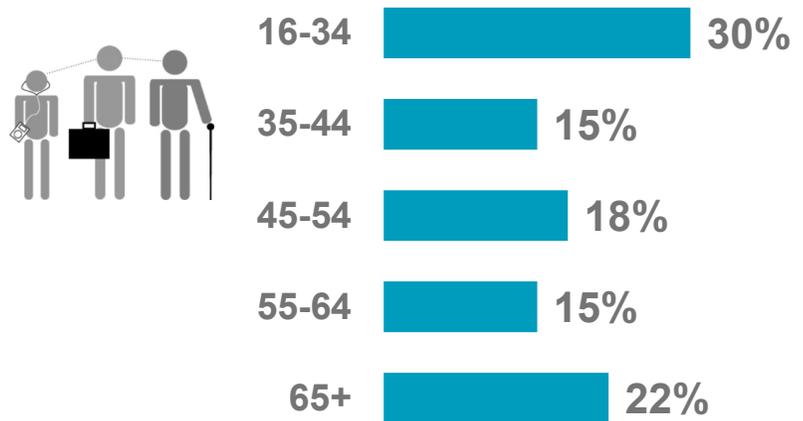
- All research was undertaken in strict accordance with MRS Code of Conduct and GDPR legislation

Sample is representative of the Scottish population – data was weighted on key demographics to match previous waves.

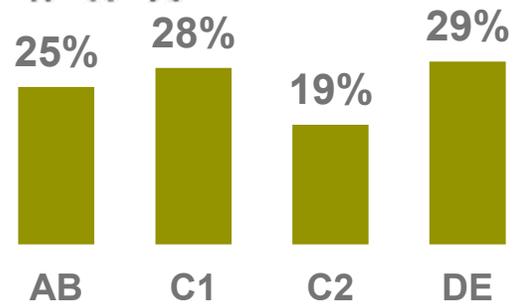
Gender



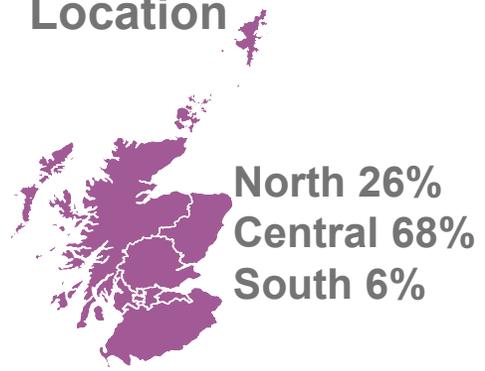
Age



SEG

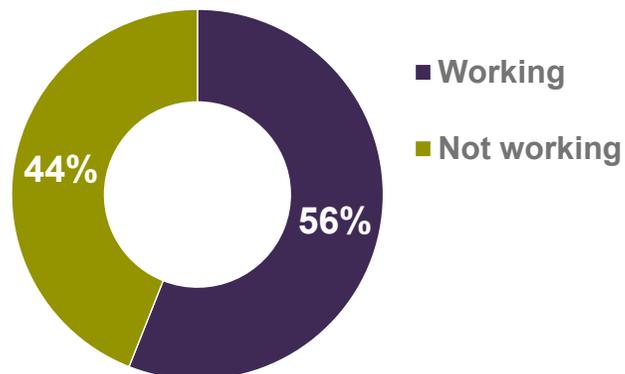


Location



Sample Profile

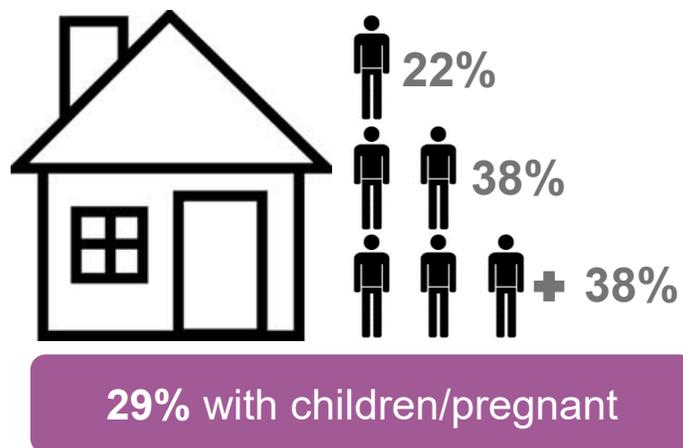
Working status



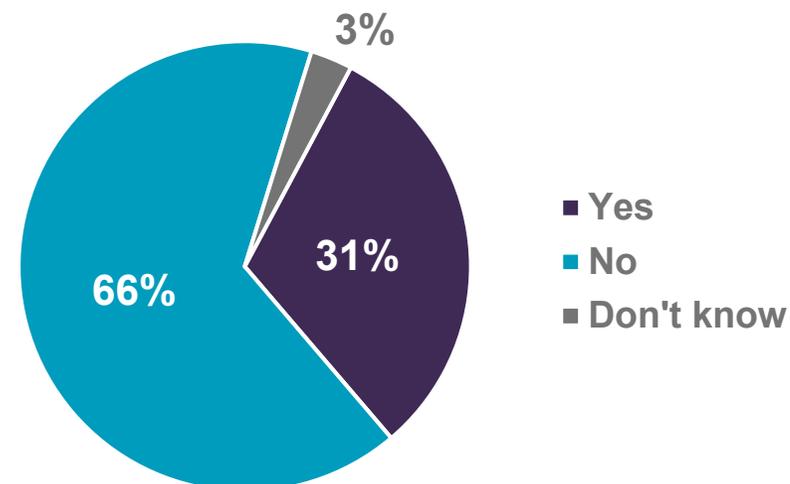
Ethnic Group

Net: White	92%
Net: Mixed or Multiple Ethnic Groups	4%
Net: Asian, Asian Scottish or Asian British	3%
Net: African	2%
Net: Caribbean or Black	0%
Net: Other ethnic group	0%
Would prefer not to say	1%

Household composition



Health issues



Awareness, Knowledge & Visibility of FSS



Just over three-quarters of adults across Scotland are aware of Food Standards Scotland and more than half feel they understand the organisation's remit very or quite well. Data is broadly consistent with the previous wave.

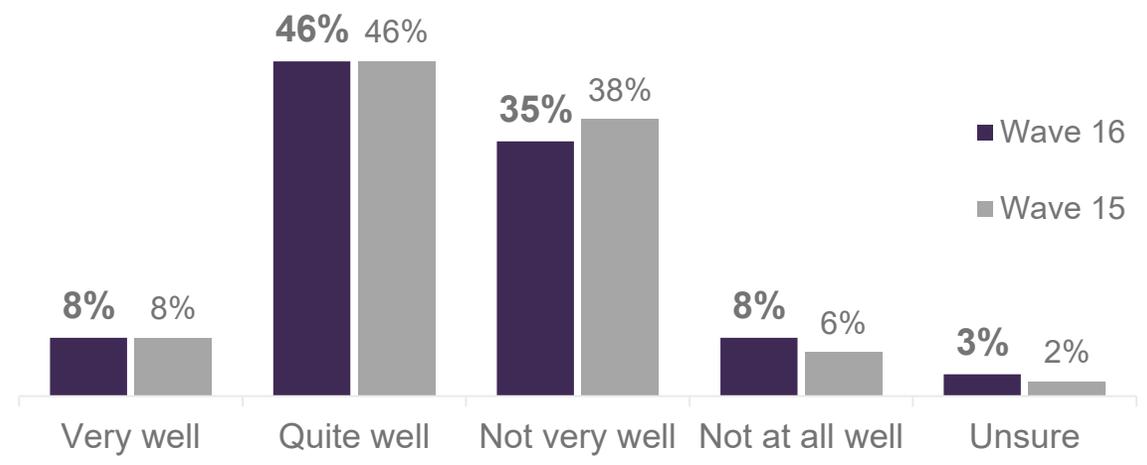


78% have heard of FSS

80% Wave 15

- Awareness levels are largely consistent across the population
- Younger age groups (12% 16-34yrs & 13% 35-44yrs); those with children at home (14%) especially those with children who have food allergies (30%) are most likely to feel they understand FSS' remit very well.

Understand FSS role/remit (those aware of FSS)



Many consumers recognise the core food safety and authenticity aspects of FSS' remit, as well as responsibilities relating to the food industry. More than half mention public facing communications on food safety and healthy eating. Data remains consistent with last wave.



-  **Safe & Authentic Food**
-  **Responsible Food Businesses Flourish**
-  **Healthier Diets**
-  **Informed Consumers**

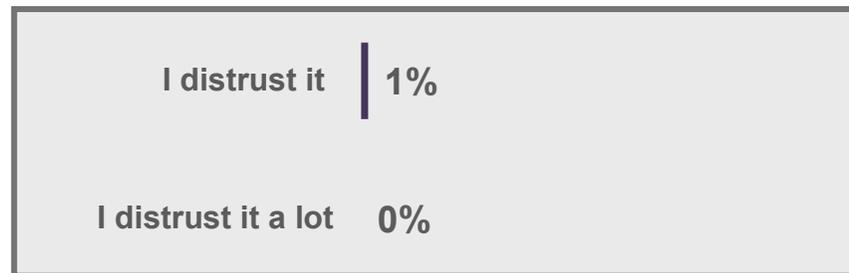
High levels of trust are placed in the organisation to do its job, by those aware of FSS. Data is very consistent with previous waves on this measure.



Levels of Trust in FSS



Trust 71%



Distrust 1%



- Females (76%) and those with children at home (77%) were significantly more likely than others to trust the organisation

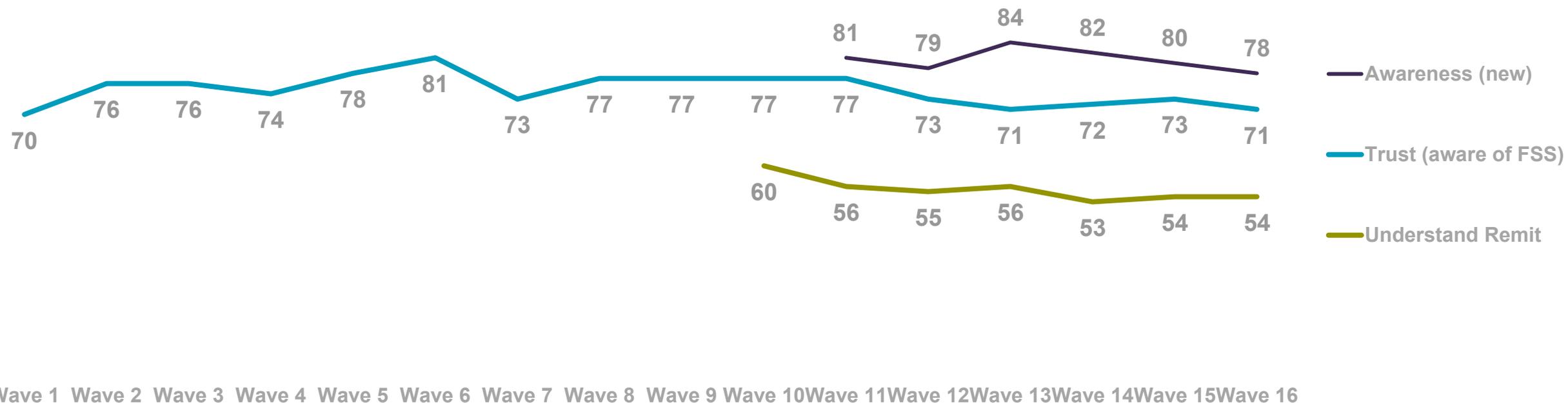
More than two thirds of consumers aware of FSS rate the organisation as good, very good or excellent across all aspects of performance. Food safety aspects are particularly highly rated, and FSS is clearly viewed as working in the best interests of people in Scotland.

% rating 'Excellent', 'Very good' or 'Good'



-  **Safe & Authentic Food**
-  **Healthier Diets**
-  **Informed Consumers**

While data on Trust and Understanding of remit have remained very consistent in recent waves, Awareness is showing a declining trend – from the high point in Dec 2021 when several consumer facing campaigns were running concurrently.



Awareness, Knowledge & Visibility – Summary

- Awareness of FSS remains high with more than three-quarters of adults in Scotland saying they have heard of the organisation – although there is some evidence of decline on this measure over the past 2 years
- More than half of those who are aware of the organisation feel they understand its remit – with aspects relating to food safety and authenticity, and responsibilities to the food industry best known
- As has been seen in previous waves, the vast majority of those aware of the organisation have trust in FSS to do its job, and rate performance highly across the board, particularly aspects relating to food safety
- FSS is also widely seen to be working in the best interests of people in Scotland
- Results are generally very consistent with previous years

FSS is clearly in a strong position with consumers in Scotland – viewed as a high performing organisation and a trusted voice – particularly in relation to food safety. Monitoring awareness levels as the organisation has less of a direct consumer facing role will be important.

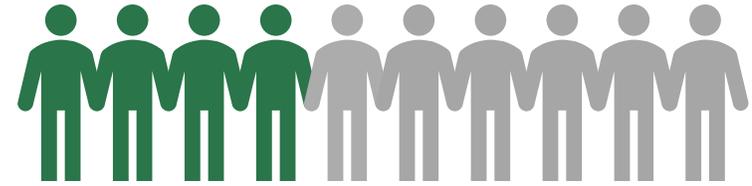
Issues of Concern to Consumers



More than three-quarters of consumers think sustainability is important in the production of food and two thirds are concerned about the environmental impact of food packaging and production. Less than half feel they have access to clear information about this.



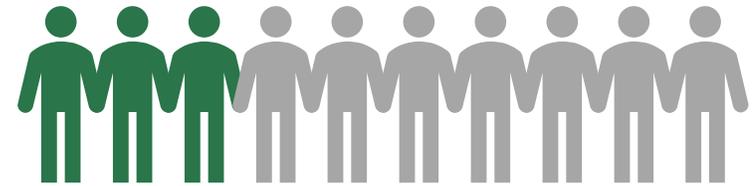
77% consider it important that their food is produced in a sustainable and environmentally friendly way



45% feel they can access clear information to know if food has been produced in a sustainable way



67% are concerned about the impact of food production and packaging on the environment

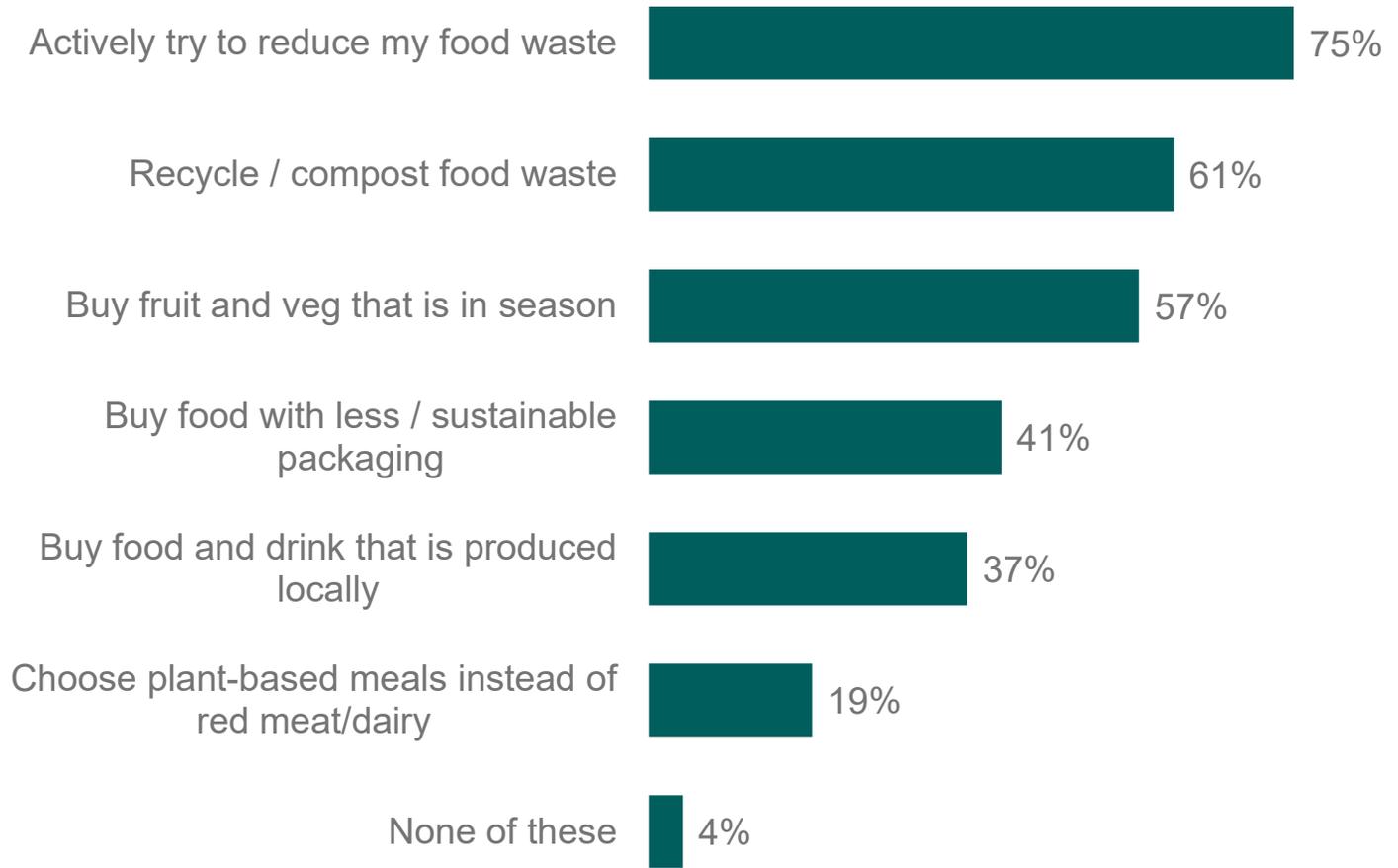


32% recognise sustainability to be part of FSS' remit

Three-quarters of consumers say they actively try to reduce food waste and 6 in 10 recycle or compost food waste and a similar proportion try to buy food in season. Other sustainable actions are less consistently practiced.



Sustainable Actions Always Taken



Data is broadly consistent across subgroups, however:

- Those in older age groups (45+yrs) are more likely to reduce or recycle food waste
- More affluent groups (AB) are more likely to buy local

Food prices remain top of the list of concerns for consumers. Animal welfare and the use of chemicals in food production, along with authenticity and quality are also key areas of concern. Concern about food poisoning has fallen after a sharp rise last wave.

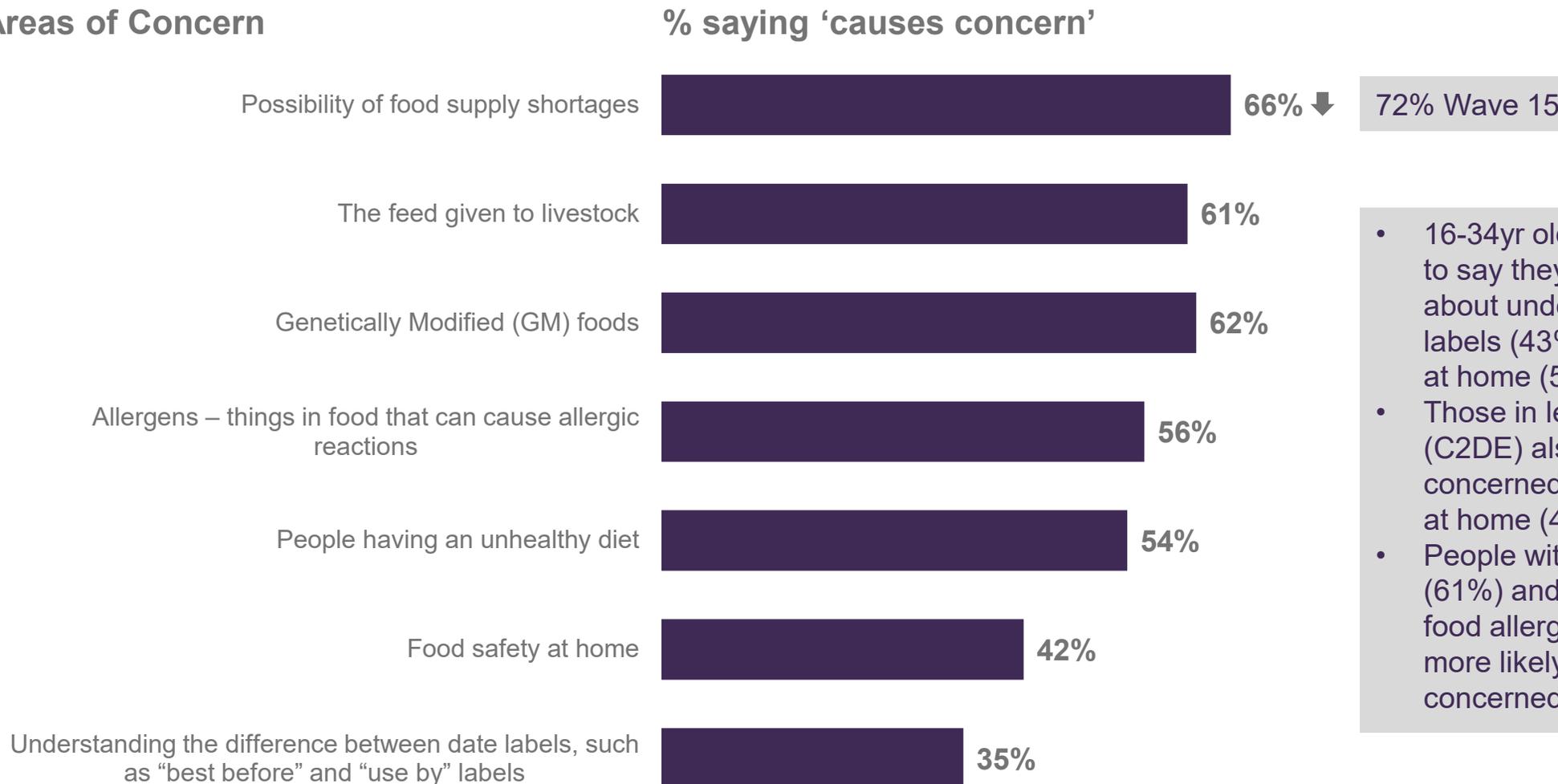
Top 10 Areas of Concern

% saying 'causes concern'



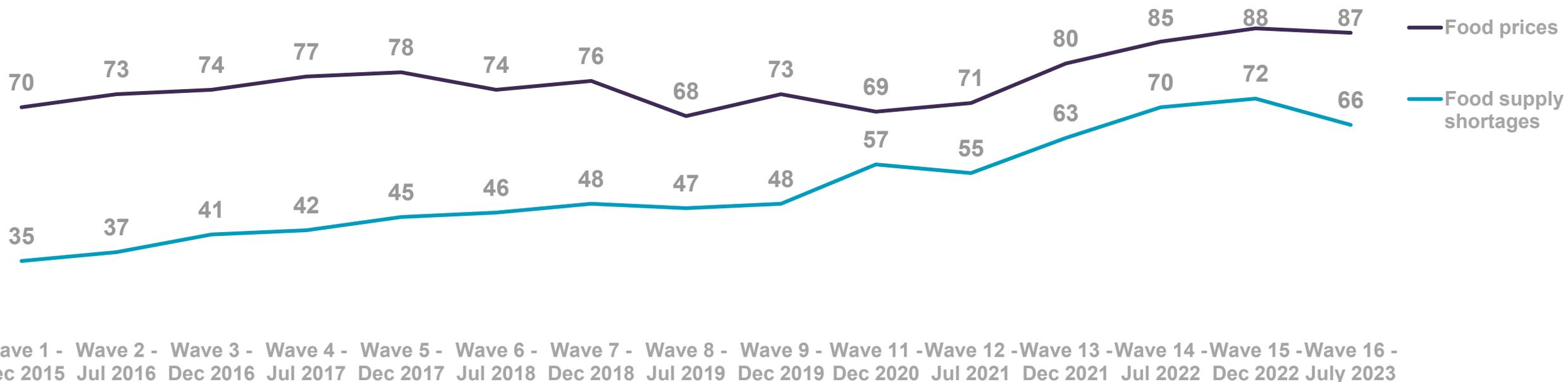
Concern about food supply shortages has significantly dropped, but otherwise the picture is very consistent with previous waves.

Other Areas of Concern



- 16-34yr olds were more likely to say they were concerned about understanding date labels (43%) and food safety at home (51%)
- Those in less affluent groups (C2DE) also more likely to be concerned about food safety at home (46%)
- People with kids at home (61%) and respondents with food allergies (77%) were more likely than others to be concerned about allergens

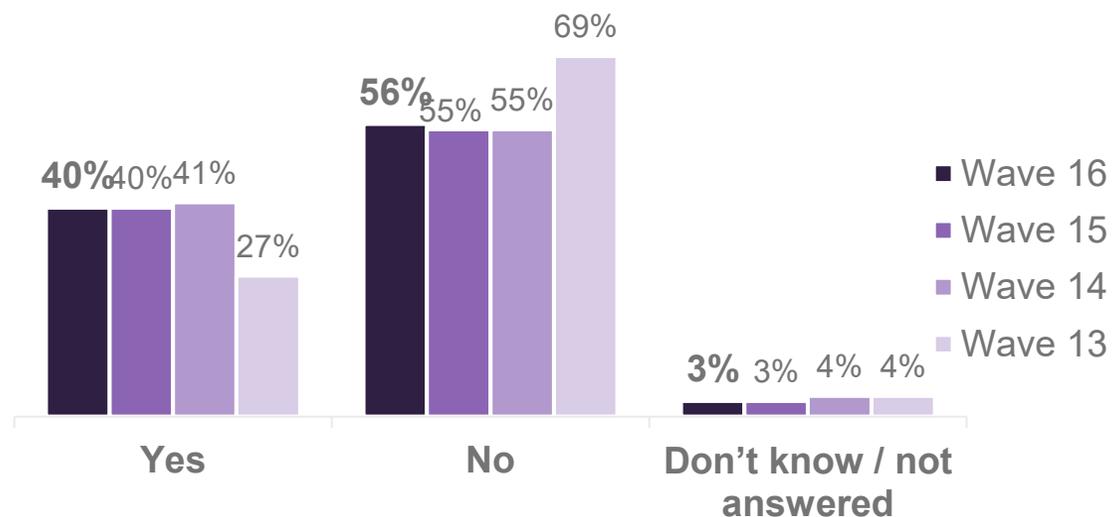
Levels of concern about food prices remains consistent, while concerns about food shortages have dropped in the latest wave.



Wave 1 - Wave 2 - Wave 3 - Wave 4 - Wave 5 - Wave 6 - Wave 7 - Wave 8 - Wave 9 - Wave 11 - Wave 12 - Wave 13 - Wave 14 - Wave 15 - Wave 16 -
 Dec 2015 Jul 2016 Dec 2016 Jul 2017 Dec 2017 Jul 2018 Dec 2018 Jul 2019 Dec 2019 Dec 2020 Jul 2021 Dec 2021 Jul 2022 Dec 2022 July 2023

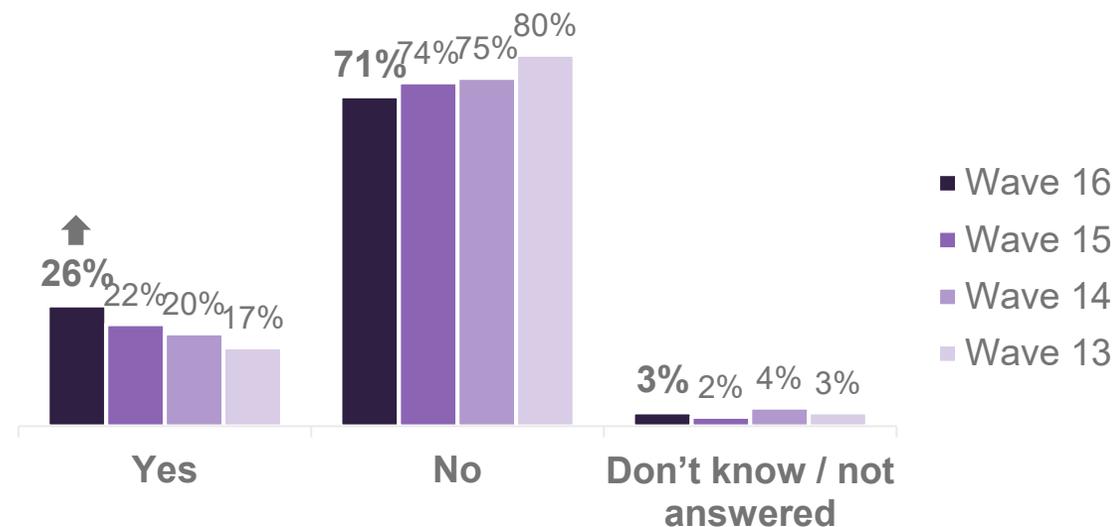
Two-fifths worried about being able to afford food in the past year – consistent with last wave. Around a quarter skipped meals due to a lack of money / resources, a significant increase on last wave. Those most likely to be affected were younger, less affluent and with kids at home.

Worry About Affording Food P12M



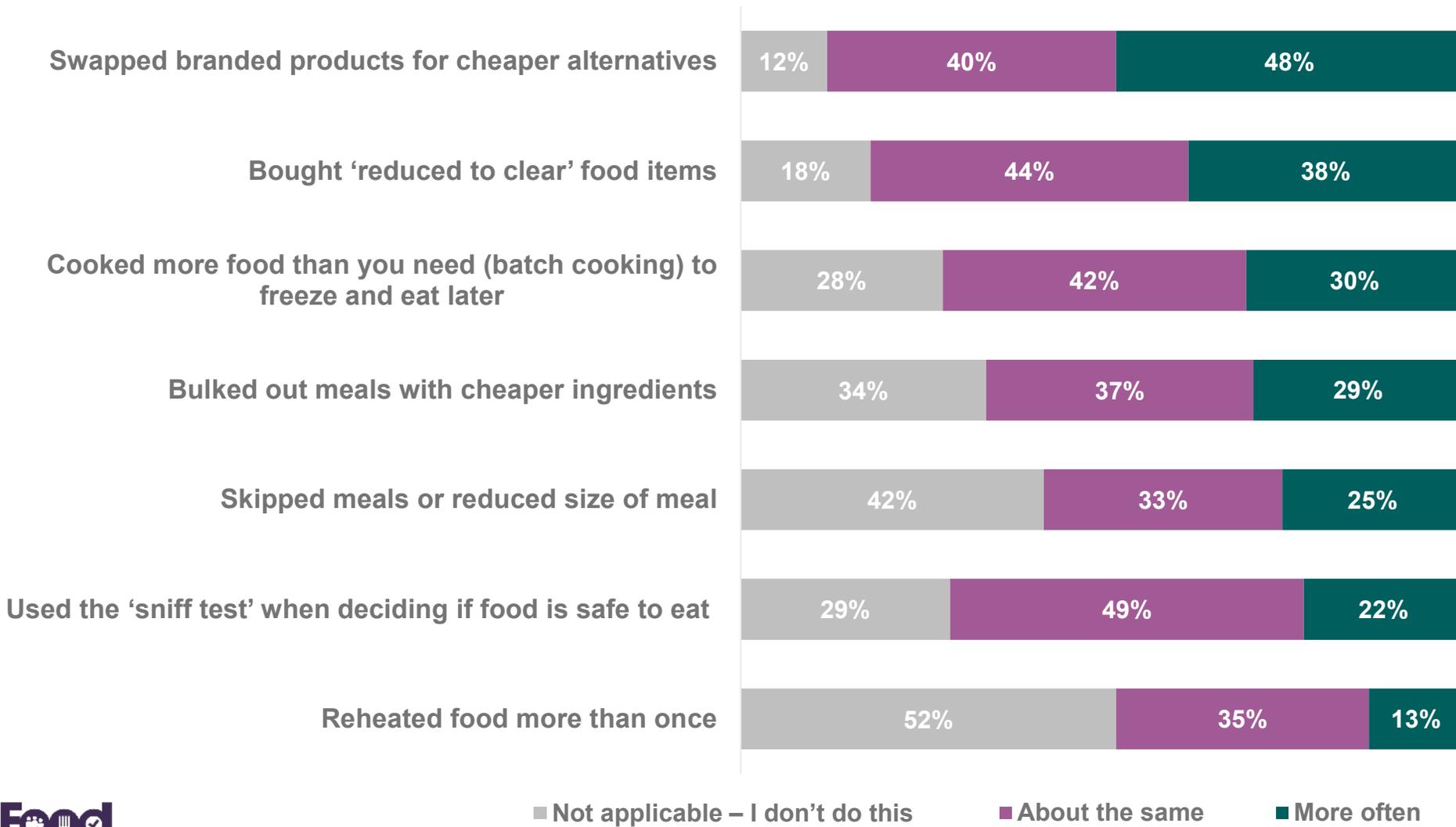
- 16-34yrs (55%); those in C2 (44%) and DE (43%) socio-demographic groups; females (46%) and those with kids at home (46%) were most likely to have worried about affording food

Skipped Meals P12M



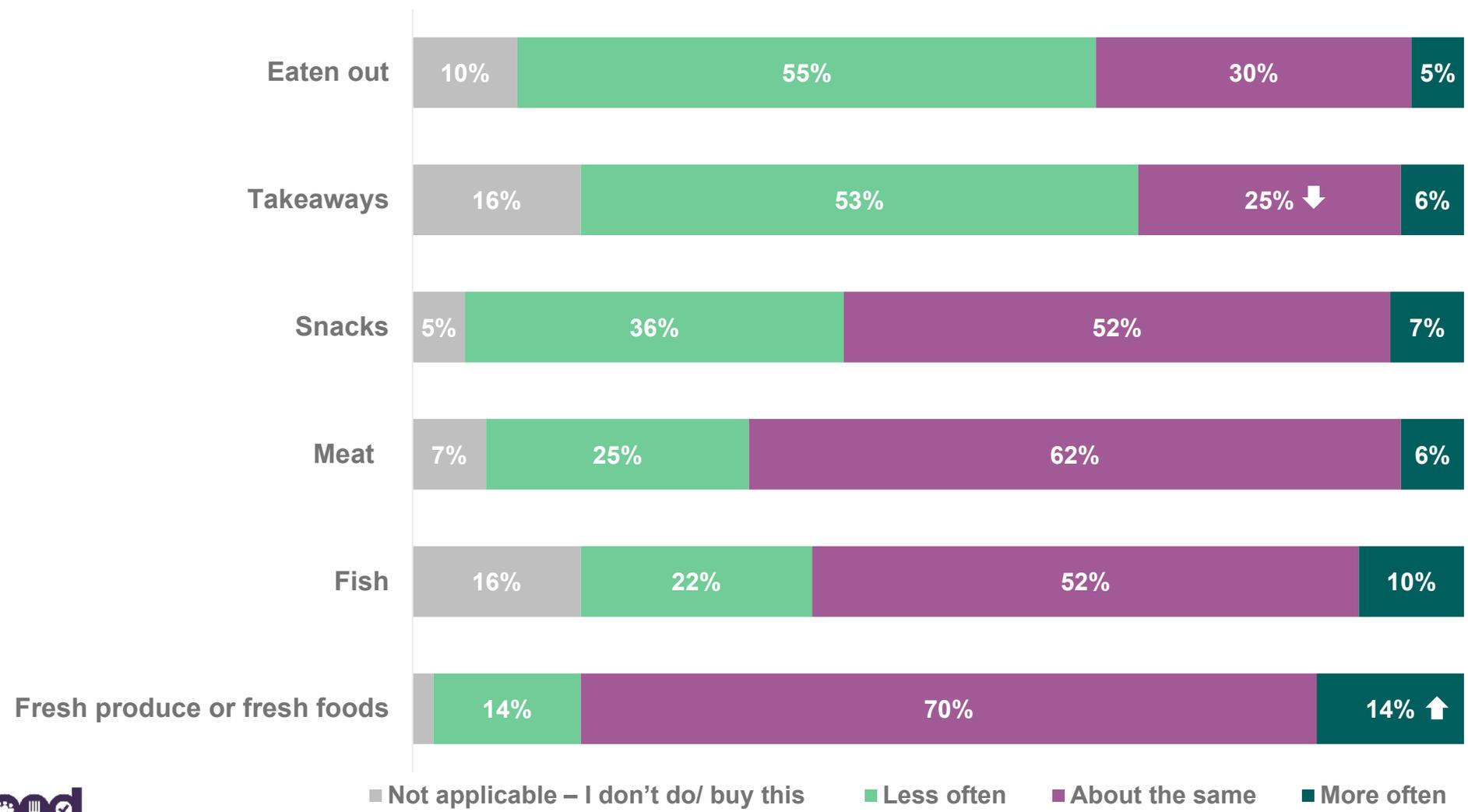
- 16-34yr olds (38%); DEs (33%); those with kids (35%) and females (30%) were also the groups most likely to have skipped meals

Consumers continue to take a range of actions to save money, notably cutting costs by purchasing cheaper alternatives and reduced to clear items. Batch cooking and bulking out meals has also increased for just under a third. Consistent with last wave.

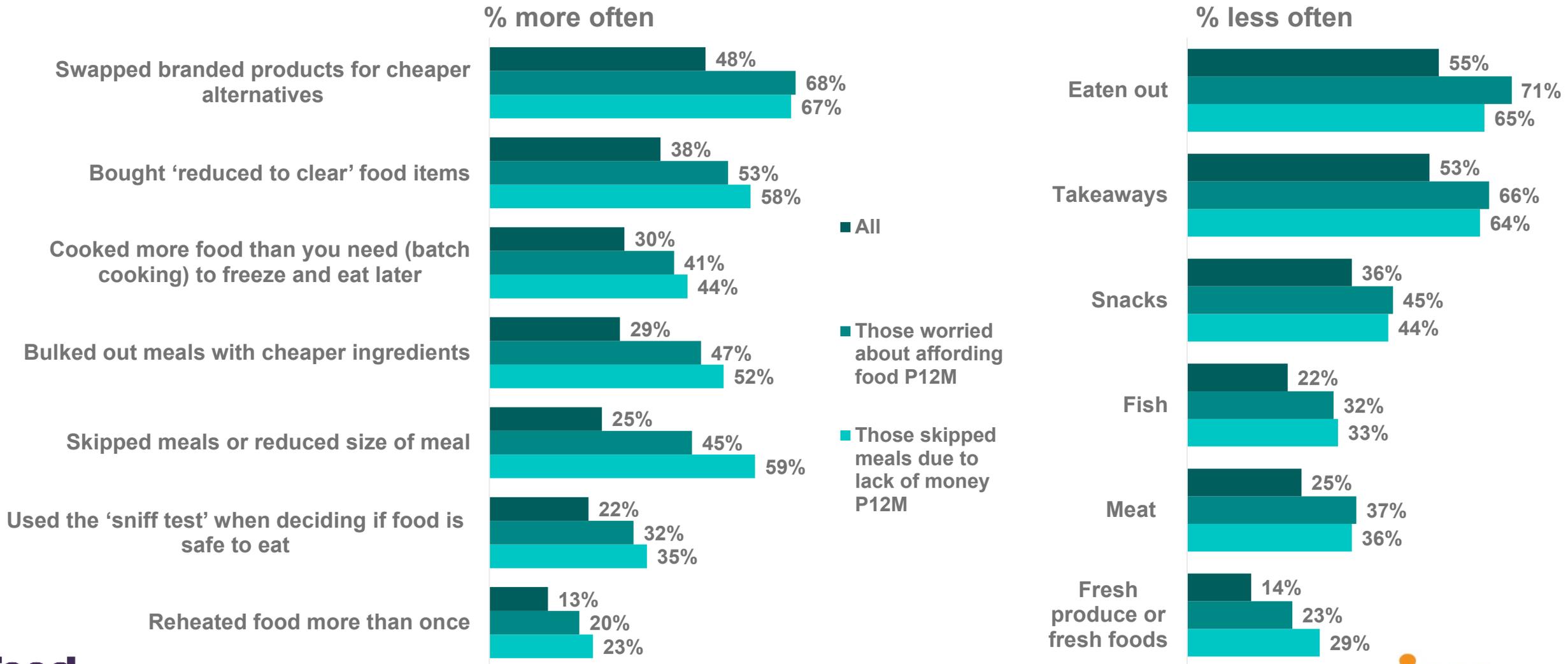


- Females were more likely to say they had done all of these actions more often

To save money over the past 6 months more than half of consumers have eaten out less often and a similar proportion have had fewer takeaways. Purchase of snacks, meat and fish is about the same, while an increasing number have bought fresh food more often (perhaps seasonal).

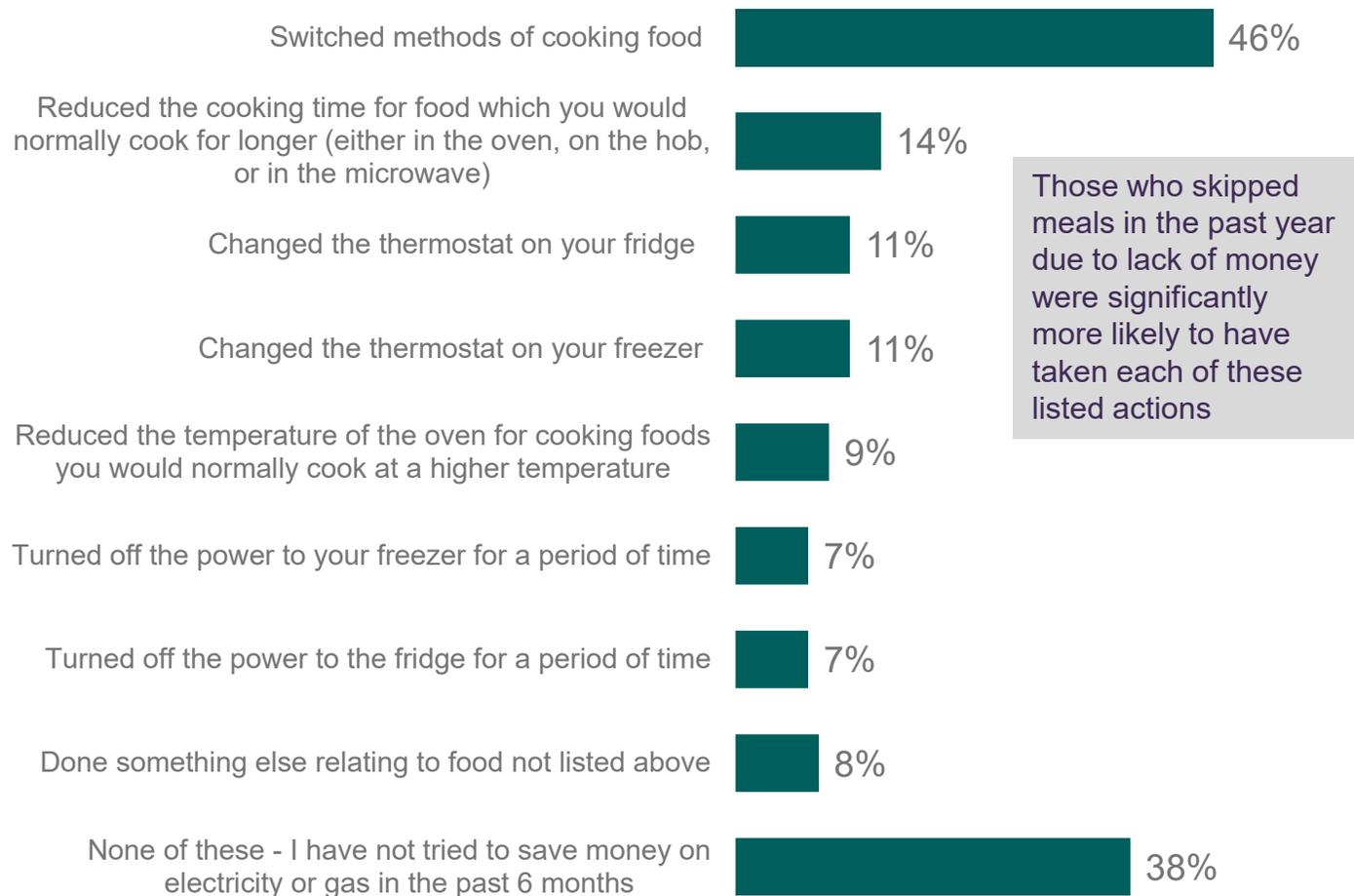


The impact on those who worried about affording food or skipped meals was much more pronounced. These groups significantly modified their behaviour over the past 6 months to try to save money.

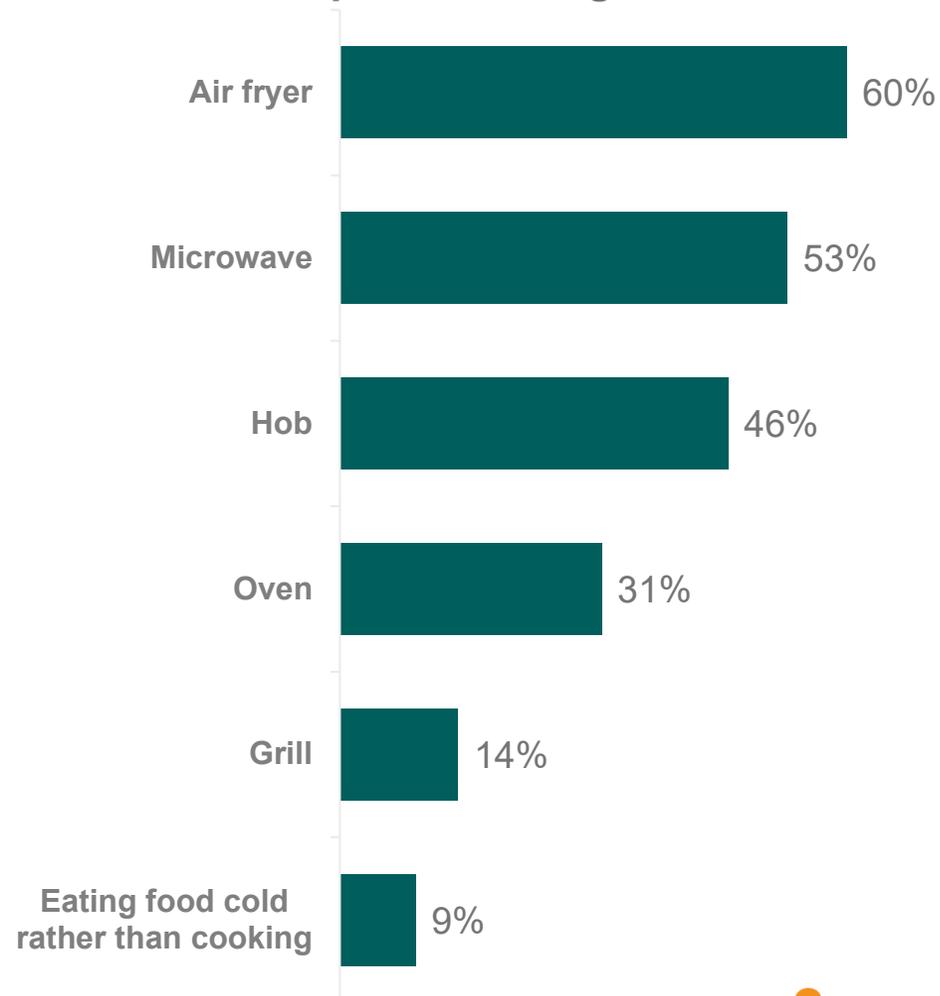


Three-fifths of consumers took action to save money on energy in the past 6 months, almost half by switching cooking methods. More than half are using air fryers or microwaves as their most frequent cooking method. Data consistent with previous wave.

Action Taken to Save Money on Energy



Most Frequent Cooking Methods



Issues of Concern to Consumers – Summary

- Food prices remains the top concern for consumers, as has been the case since December 2021, however this wave sees a drop in levels of concern around food shortages which had been a feature post Brexit and pandemic
- Food production and animal welfare as well as the quality and authenticity of food are also key consumer concerns
- Sustainability is important, with most taking some action to minimise the environmental impact of their food purchase and consumption – albeit largely relating to food waste
- Food insecurity remains a problem with a significant minority worried about affording food, and an increased number having skipped meals due to lack of money
- The cost of living crisis is still clearly having an impact on consumer behaviour – with many making changes to shopping, cooking and eating habits in order to cut costs / save money
 - The impact is particularly pronounced for those experiencing food insecurity

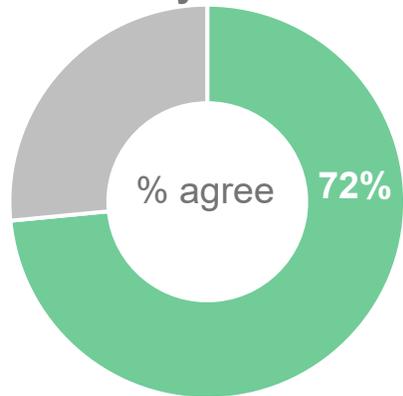
Very little change has been recorded since last wave, highlighting that for now at least, consumer concerns are very closely tied to the cost of living crisis

Healthy Eating – Attitudes, Knowledge & Behaviour

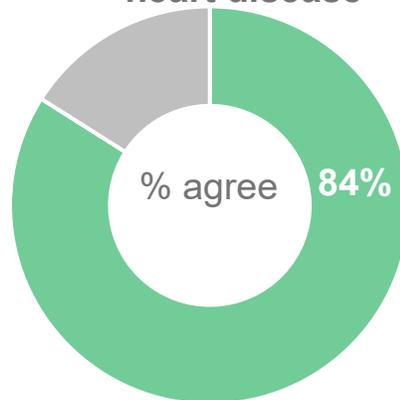


Around three-quarters think there are too many people eating unhealthily in Scotland, and that as a nation we need to make significant dietary changes. Unhealthy diets and obesity are recognised as causing problems, and there is majority support for government action.

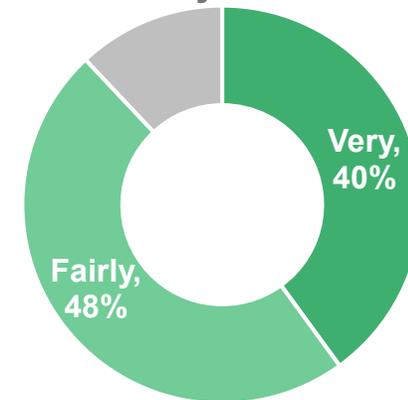
There are too many people who eat unhealthily in Scotland



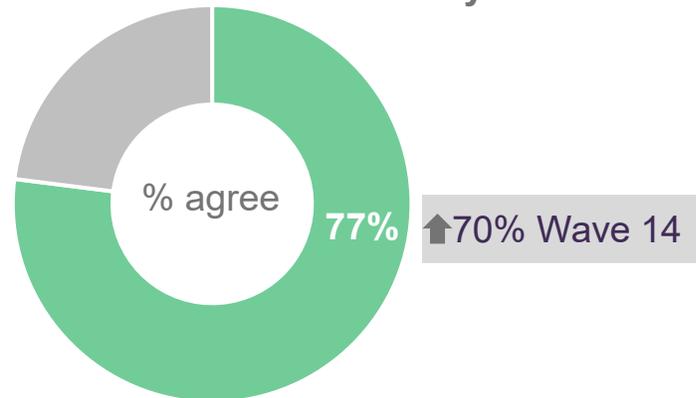
I know that an unhealthy diet can cause lots of health problems, like cancer and heart disease



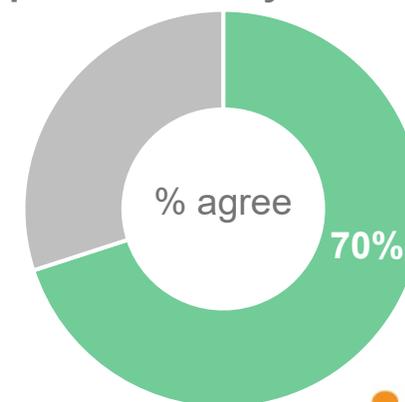
How serious a problem is obesity in Scotland



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



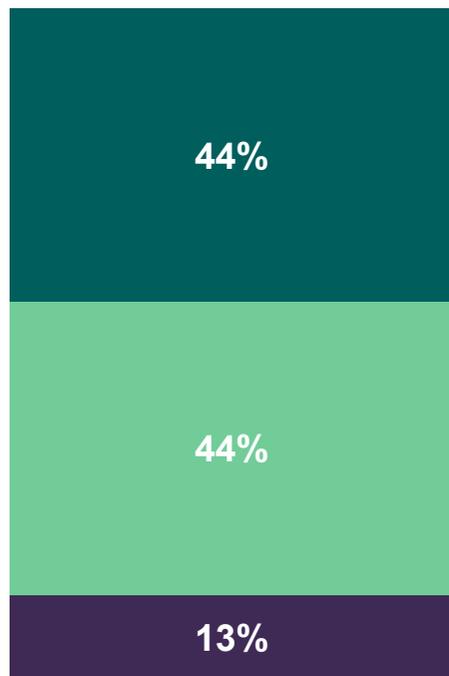
Government should take action to prevent obesity in Scotland



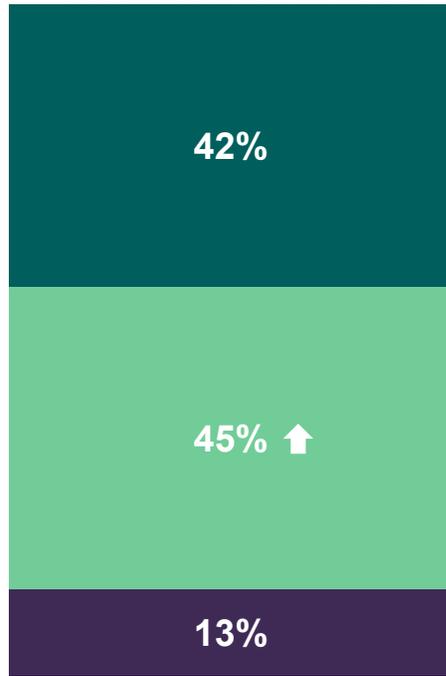
More than two-fifths of consumers say the amount of sugar and saturated fat in food concerns them a lot, and a similar proportion say it concerns them a little. Fat and salt content also give some cause for concern, with data in line with previous years.



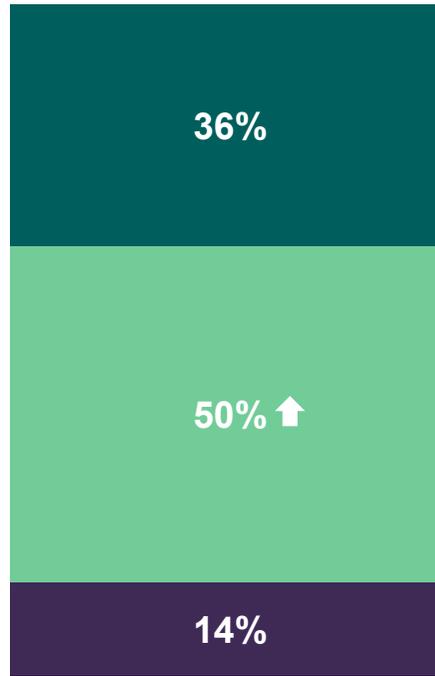
The amount of sugar in food



The amount of saturated fat in food



The amount of fat in food



Concerned 'a lot'
 • Females (39%)



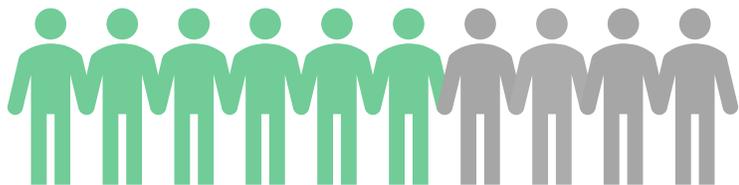
The amount of salt in food



Concerned 'a lot'
 • Kids at home (36%)

■ A lot
 ■ A little
 ■ Not at all

6 in 10 feel the food they eat is healthy, with those in more affluent groups significantly more likely to say this than those in less affluent groups. Two-thirds of those with children feel their kids' diet is healthy, but more than half do have some concerns about the types of food eaten.



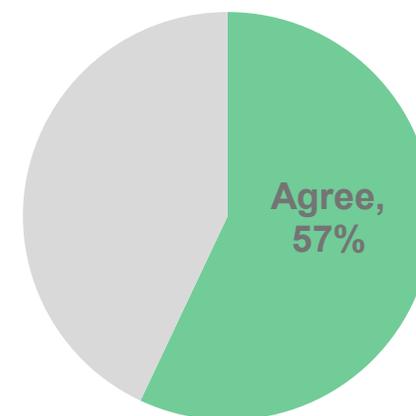
60% say the kind of foods they eat are very / quite healthy

Significant difference by SEG:

- AB 73% → DE 54% very/quite healthy

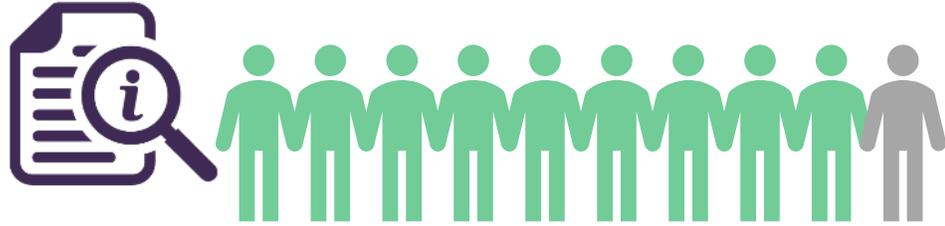


66% say the kinds of food their children eat are very / quite healthy



I'm worried about the types of food my child(ren) is / are eating

9 in 10 feel they have clear information on eating a healthy balanced diet, and almost three-quarters are confident they know what a balanced diet is. However, a significant minority get confused about what is healthy – especially older and less affluent groups.



90% say they have clear information on eating a healthy balanced diet

% agree

I'm confident I know what makes up a healthy balanced diet

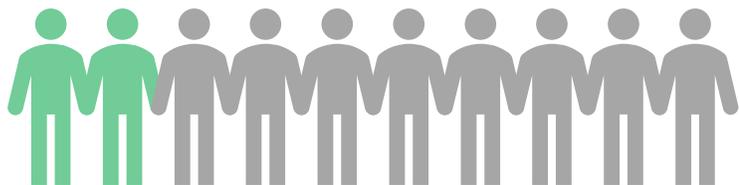


I get confused over what's supposed to be healthy and what isn't



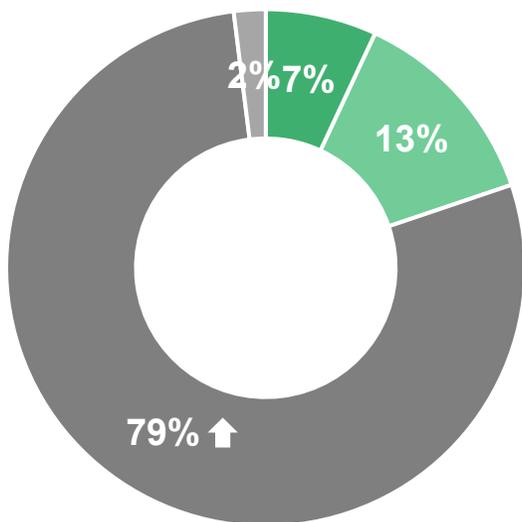
- Older (65+yrs 35%) and less affluent (DE 32%) groups most likely to say they get confused

2 in 10 recalled either seeing or hearing about the Eat Well Your Way resource including 7% who said they had used it. The proportion who had not heard of Eat Well Your Way has increased compared to last year.

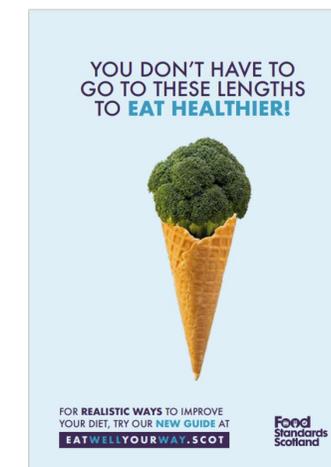
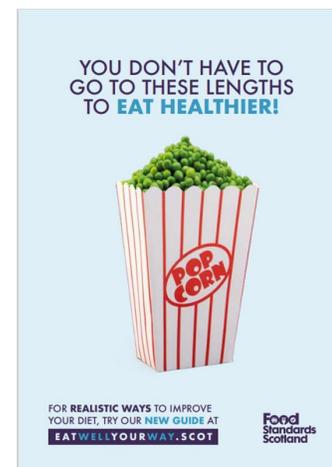


20% have seen / heard of Eat Well Your Way

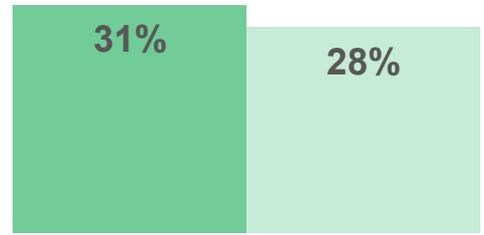
Highest awareness = 16-34yrs (31%); those with kids (32%); people with food allergies (38%)



- Heard of and used online resource
- Heard of but not used online resource
- Not heard of it
- Don't know

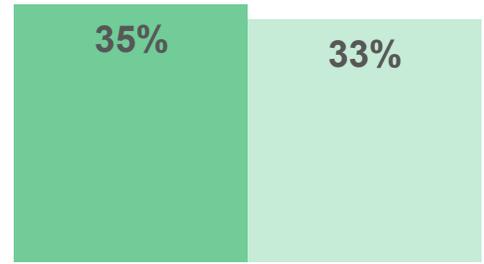
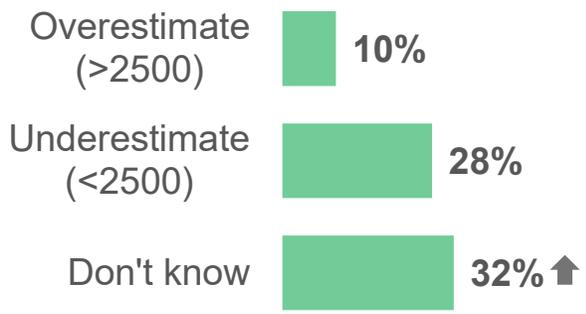


Just under a third were able to correctly state the recommended calorie intake for men, and slightly more were able to state the correct figure for females. In both cases, the proportion who said they didn't know increased this wave.



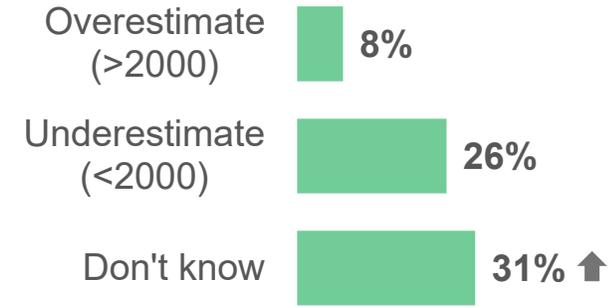
■ Wave 16
■ Wave 14

2500 (Correct)



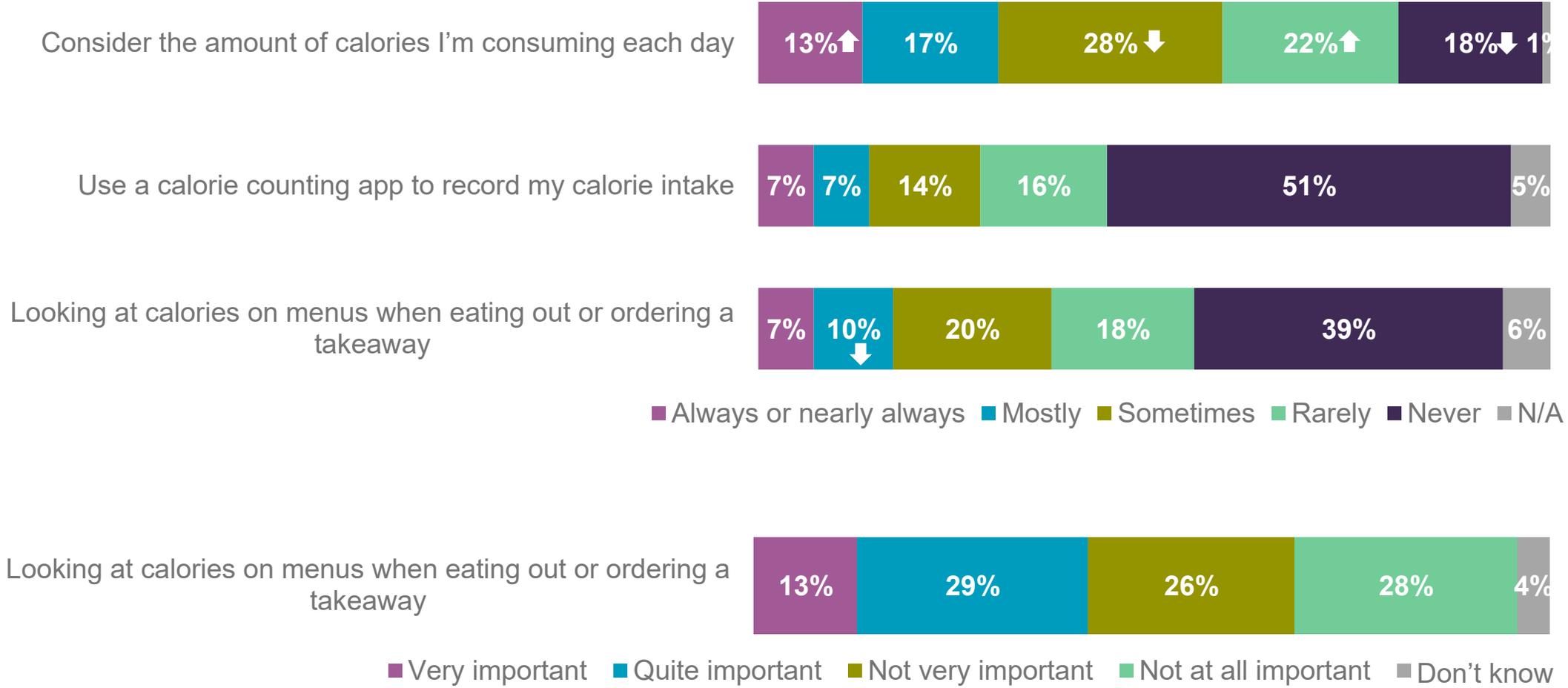
■ Wave 16
■ Wave 14

2000 (Correct)



- In both cases, females were more likely to know the correct figure while males, DEs and over 65yr olds were more likely to say they didn't know

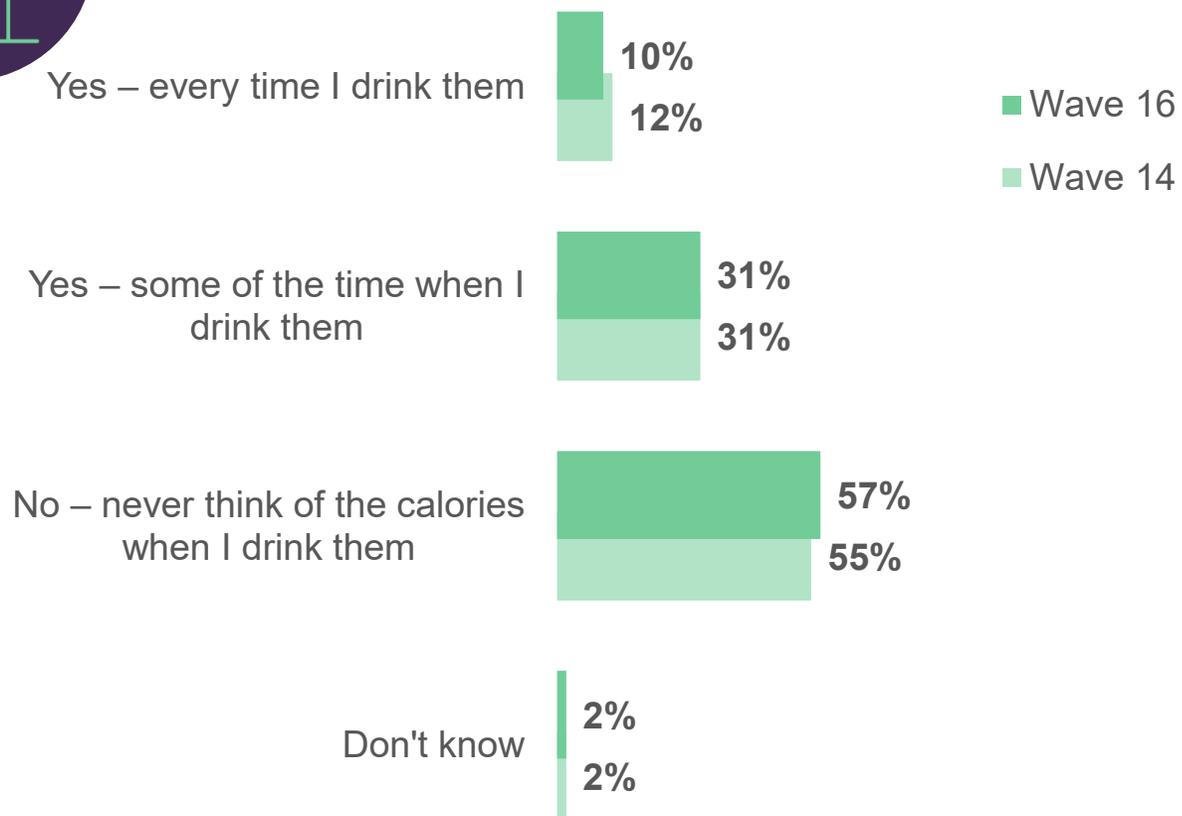
3 in 10 say they mostly / always consider the amount of calories they consume daily although few use a calorie counting app. While two-fifths say it's important to look at calories on menus when eating out / ordering takeaways, almost as many say they never do this.



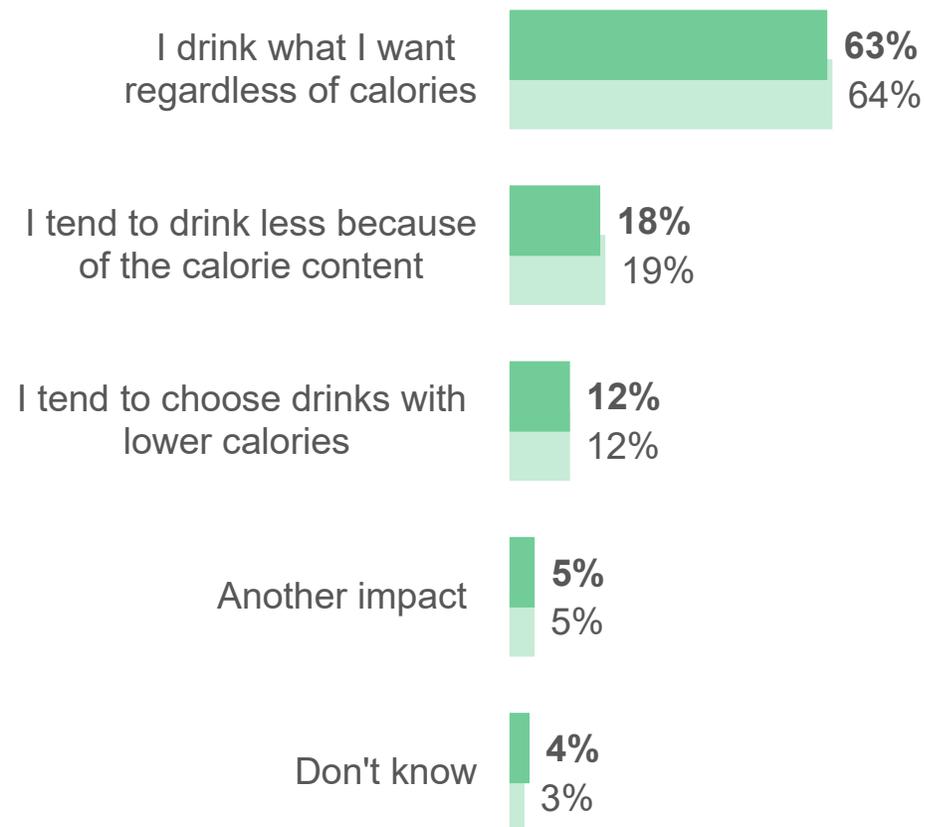
Around two-fifths are aware of the calories in alcoholic drinks at least some of the time when drinking, however the majority drink what they want, regardless. Those who do moderate their behaviour due to calories are slightly more likely to drink less than choose lower calorie drinks.



Aware of Calories in Alcoholic Drinks



Impact of Calories on Drinking Behaviour



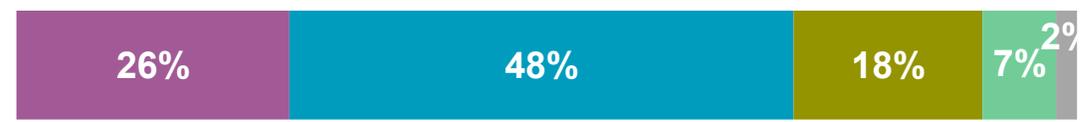
Trying to eat a balanced diet, including eating 5-a-day and only occasionally choosing high fat / salt / sugar foods is considered important by the majority of consumers. More than 6 in 10 say it's important to look at traffic light labelling.



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



Trying to balance my diet by thinking about food groups such as protein, fruits and vegetables, dairy and starchy foods



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



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



Eat less meat



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

Almost two-thirds mostly / always drink the recommended amount of fluids each day and more than two-fifths eat at least 5 portions of fruit and veg. A similar proportion say they always or mostly look at traffic light labelling on foods.



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



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

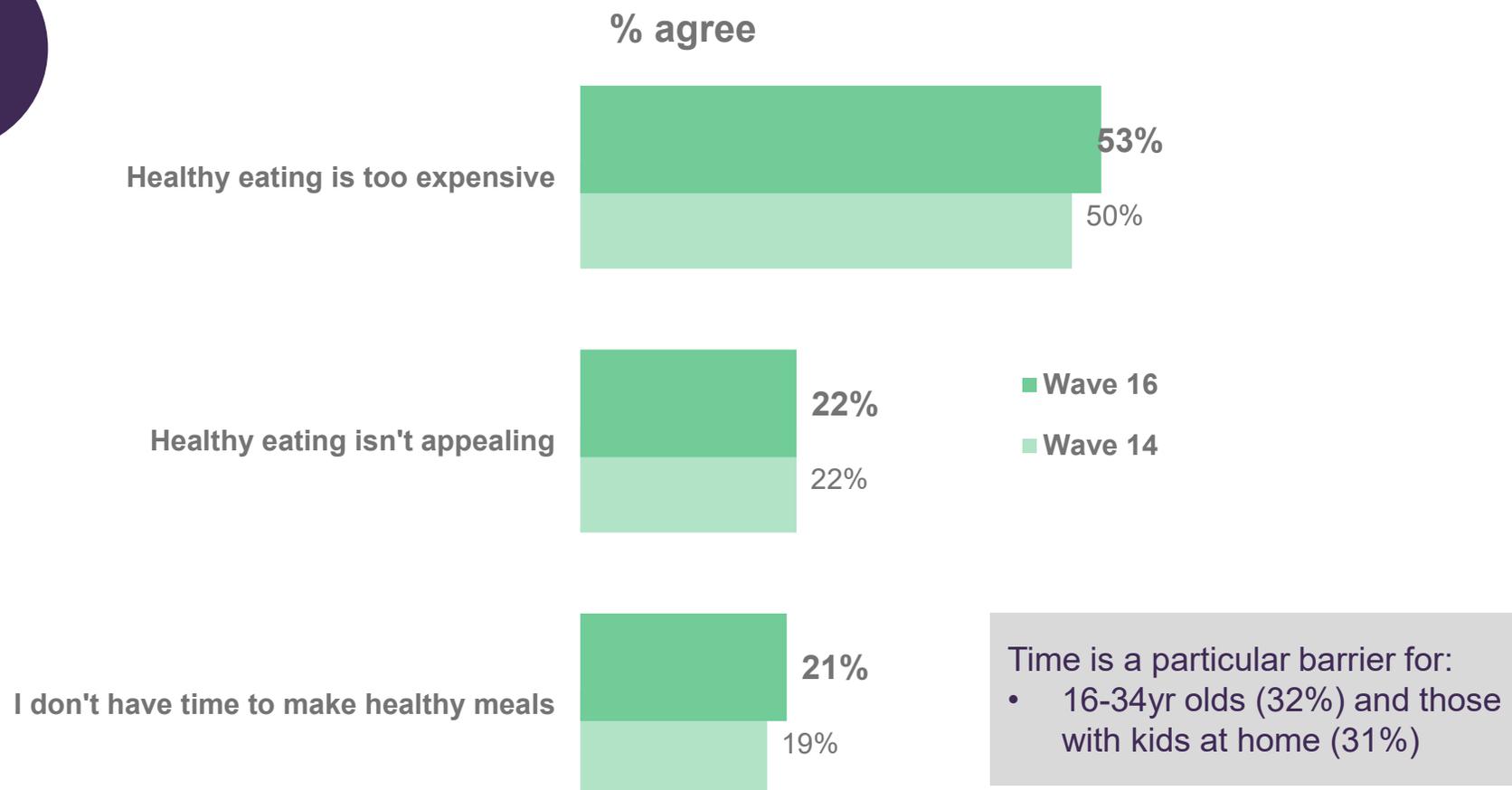


Look at the front of pack traffic lights, or colour coded labelling which shows how many calories, sugar, salt and saturated fats are in package foods



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

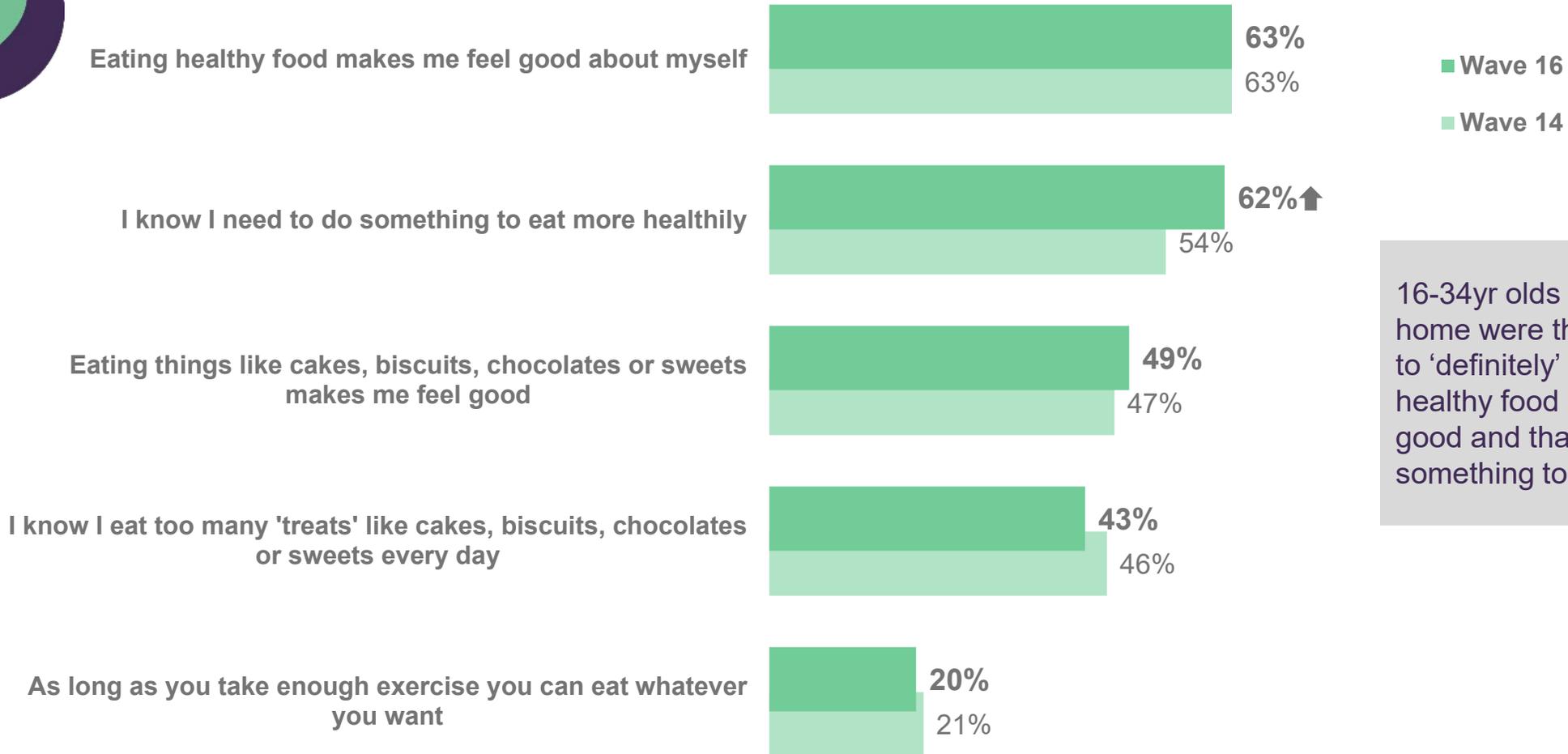
Barriers to healthy eating remain consistent with previous waves, with cost the major factor, cited by around half.



More than 6 in 10 say eating healthy food makes them feel good about themselves but almost half feel good when eating sweet treats. Significantly more this wave acknowledge the need to eat more healthily.



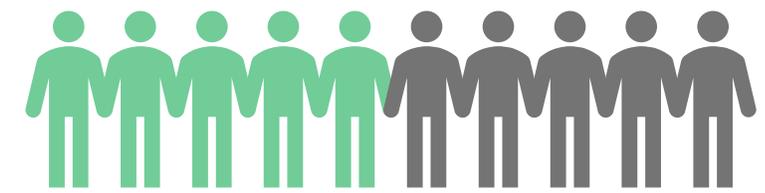
% agree



16-34yr olds and those with kids at home were the groups most likely to 'definitely' agree that eating healthy food makes them feel good and that they need to do something to eat more healthily.

Two thirds think unhealthy foods are on promotion more often than healthy, around half would support restricting marketing / promotion of unhealthy foods, but only around two-fifths feel this should be banned. And while consumers acknowledge it's easy to buy and eat sharing packs, just a third want portion sizes to be reduced.

% agree



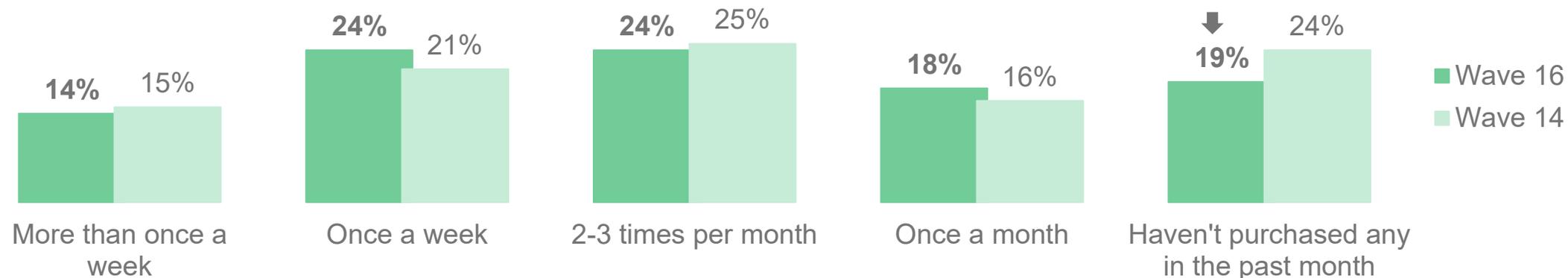
51% would support restricting the marketing / promotion of some unhealthy food/drink



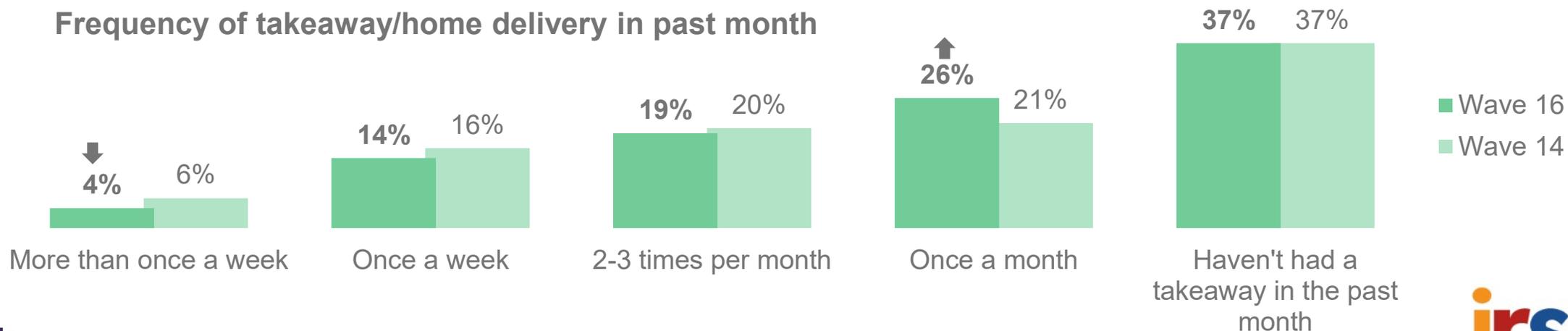
Those with kids are significantly more likely to support reduction of portion sizes of unhealthy foods (47%) and banning promotional offers altogether (51%)

Almost 4 in 10 had purchased food to eat out of home at least once a week in the past month, similar to last year. Ordering takeaway / delivery foods was less frequent with 63% having done so once or not at all.

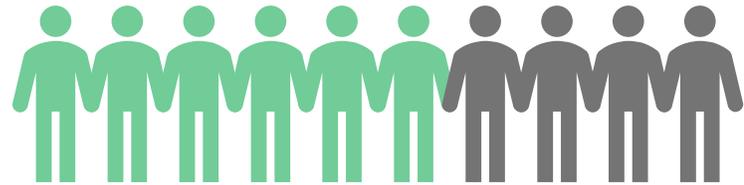
Frequency of purchasing food to eat out of home in past month



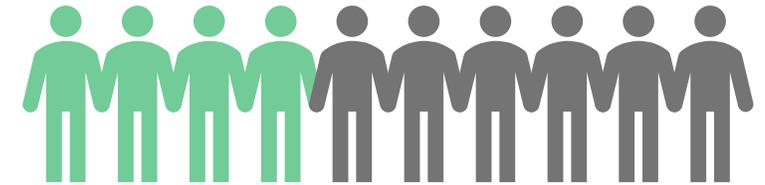
Frequency of takeaway/home delivery in past month



Half tend to eat less healthily when eating out and a similar proportion say they don't want to think about healthy choices when eating out. While almost 4 in 10 agree that there is insufficient choice of healthy foods, fewer find it difficult to identify which options are healthy.



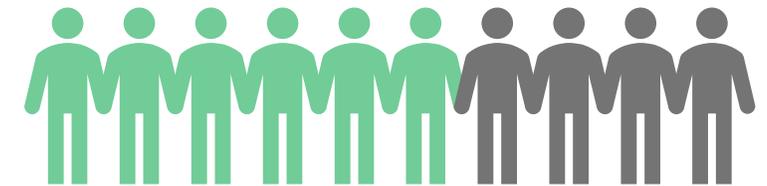
52% say they tend to eat less healthily when eating out



29% say they find it difficult to know which options are healthy and which are not healthy when eating out



47% agree they don't want to think about healthy choices when eating out



37% agree there are not enough healthy choices when eating out

Around half agree that all restaurants, cafes and takeaways should display calories on their menus and a third say this would make them more likely to choose to eat there. Lower prices, increased choice and better promotion would all encourage healthier choices when ordering.



% agree

All restaurants / cafes / takeaways should display calories on their menus

47%

Having calories for meals displayed on a menu would make me more likely to choose to eat there

32%

In restaurants / cafes / takeaways that display calories on their menus, it should always be possible to request a menu without calories shown

39%



Making it Easier to Eat Healthily

Lower prices for healthy options 51%

More healthy options 44%

Better promotion of healthy options 36%

Being able spot healthy options quickly and easily 33%

Showing the calories in food on menus 29%

Smaller portion sizes 27%

Not being asked if I want to go large, make it a meal deal, or if I want to add sides or extras 21%

Fewer promotions on unhealthy options 18%

I don't want to eat healthily when eating out 15%

I already find it easy to eat healthily when eating out 12%

Nothing/none 6%

Other 1%

Don't know 3%

Inclusion of fruit and vegetables and non-fried options on children's menus is widely supported, as is the idea of reviewing and making children's menus generally healthier.



Children's menus should include at least one option that is not fried



Each main meal on a children's menu should contain at least one portion of vegetables or fruit



At least one fruit based dessert should always be available on a children's menu



Menus that are specifically aimed at children should be reviewed and made healthier



Children's menus should include small or half portions of options from the adult menu



Sugary drinks should not be offered as part of a children's menu



■ Strongly agree
 ■ Agree
 ■ Neither agree nor disagree
 ■ Disagree
 ■ Strongly disagree
 ■ Don't know

Healthy Eating – Attitudes, Knowledge & Behaviour – Summary

- Attitudes towards diet and nutrition remain very consistent with last year – the public know there is an issue in Scotland with too many people eating unhealthy diets, and understand that this can have significant health impacts
- However, at the individual level, most deflect, considering themselves to have a fairly healthy diet
- Claimed knowledge around what a healthy balanced diet looks like is high, and most do seem to understand the key principles
- At a behavioural level, while the vast majority manage the recommended fruit / veg and water intake at least sometimes, relatively few are always following key principles of a healthy balanced diet
- The environment – retail and out of home – does not help, with acknowledgement by many that it is unhealthy foods that are usually on promotion, and that healthy options can be expensive and difficult to find
- However, relatively few support an outright ban on marketing and promotion of unhealthy foods, nor do they want to see portion sizes reduced, rather financial incentives are preferred – a likely effect of the cost of living crisis

Changing behaviour in this space is undoubtedly complex – capability is there, in terms of knowledge and understanding, but opportunity and motivation are lacking. Communications can help with the latter, but influencing policy in the retail and out of home environments is also crucial in providing greater opportunity for consumers to make healthy choices.

Allergens

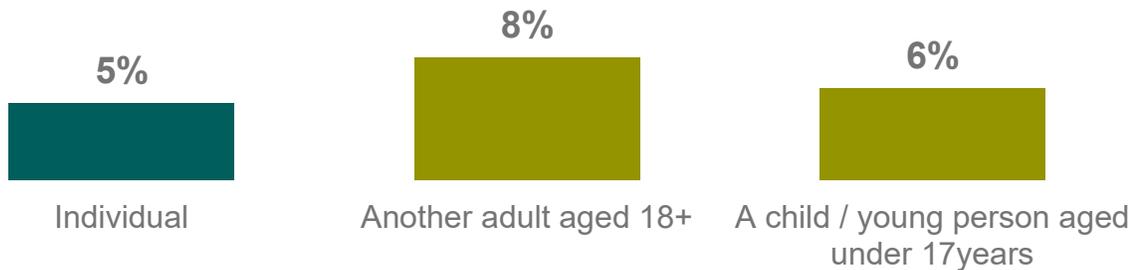


14% of households in Scotland include at least one person with a self-reported food allergy. A mix of allergies were mentioned this wave with milk, peanuts and other nuts and eggs most common.



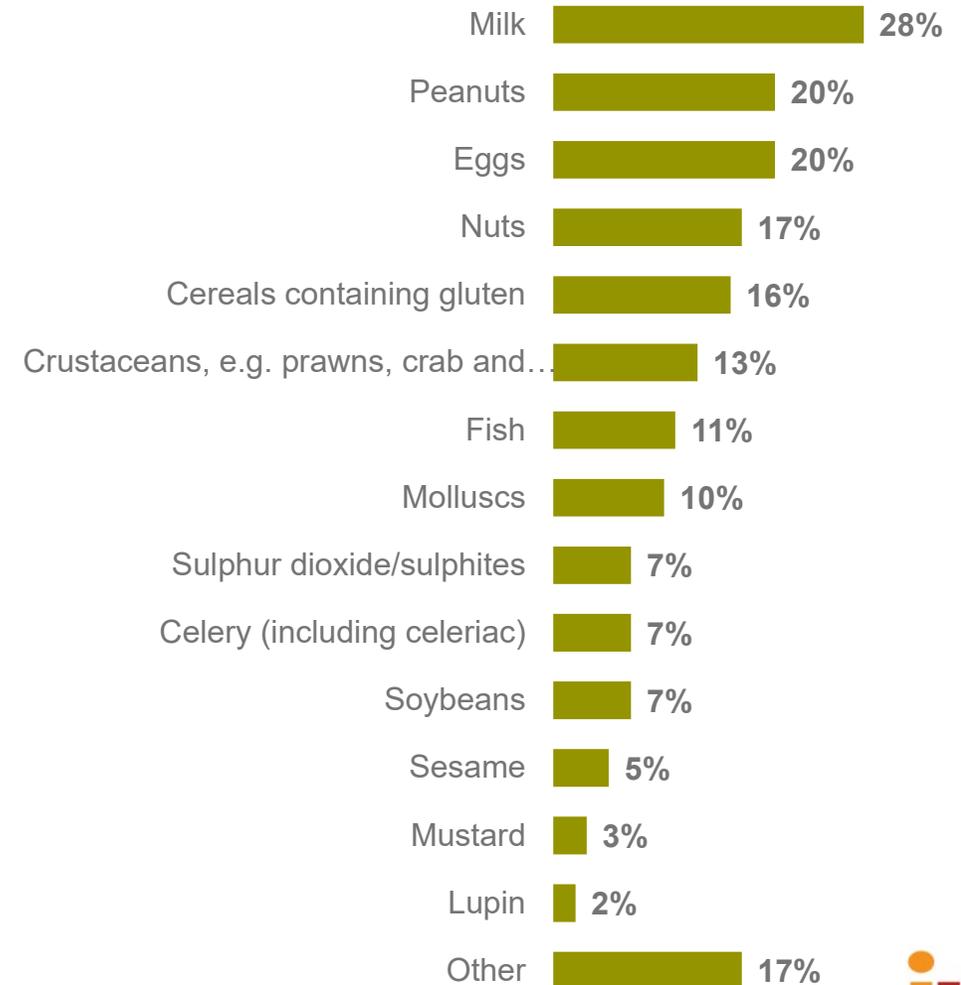
14% of Scottish households include at least one person with a food allergy

Food Allergies in Household

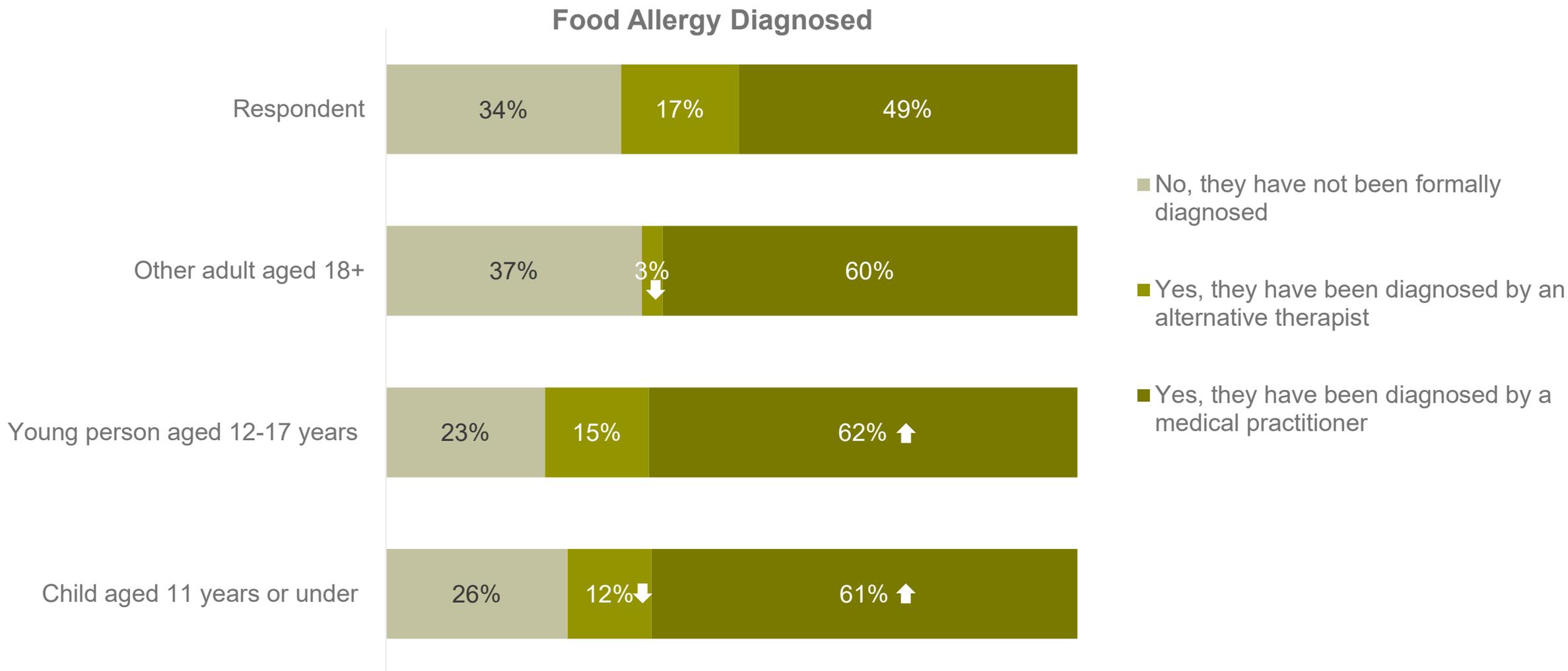


75% buy food for those with an allergy in their household

Type of Food Allergy

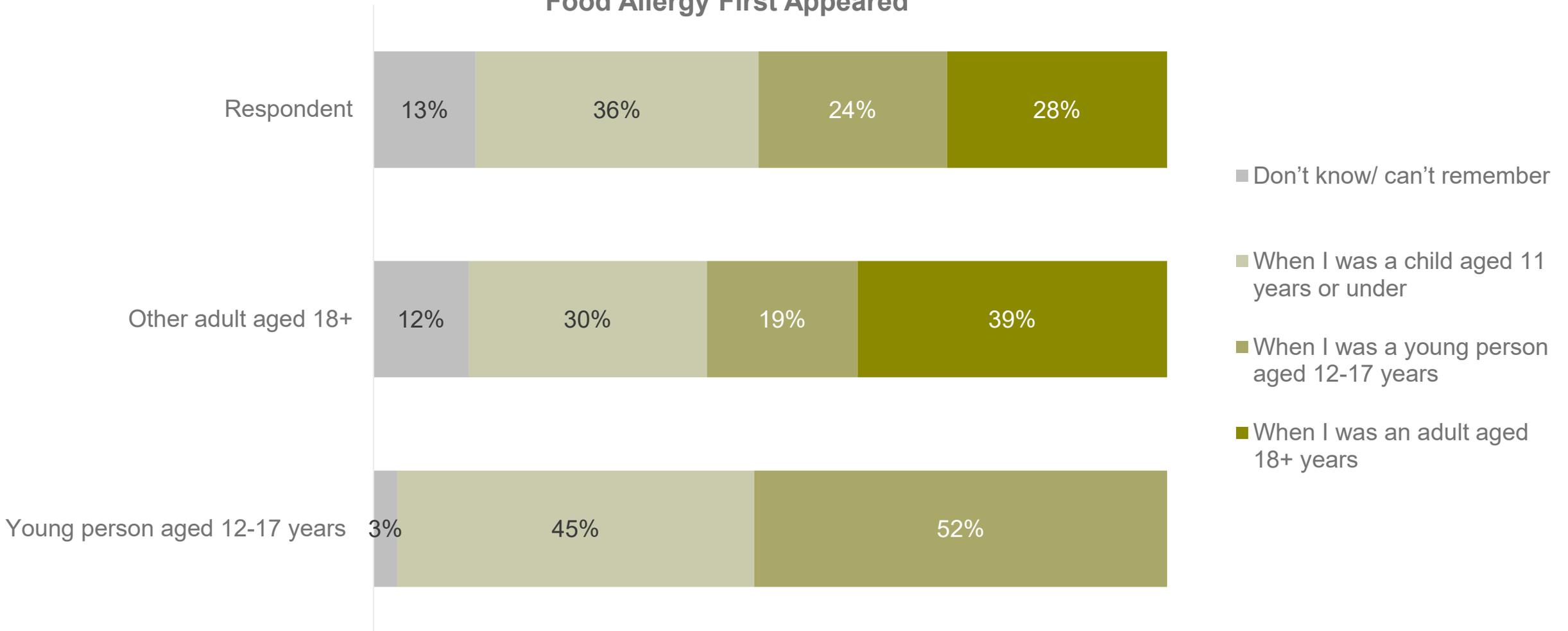


Half or more of those with food allergies have been diagnosed by a medical practitioner, fewer have been diagnosed by an alternative therapist. Around a quarter of young people, and around a third of adults have not been formally diagnosed.

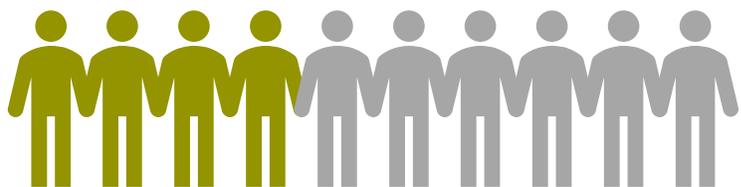


For those whose children have allergies, just under half say the allergy first appeared when the child was under 11yrs and just over half when the child was aged 12-17yrs. In adults, food allergies appeared at various stages throughout their lives.

Food Allergy First Appeared



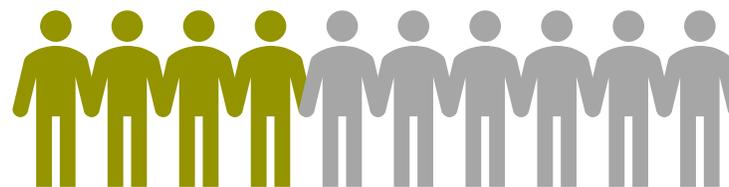
Just over two fifths are aware of the allergen alert system, a decrease compared with last wave, although a similar proportion of those with allergens are signed up to the alerts. Some evidence of risk taking with not all completely avoiding allergens or carrying an EpiPen.



43% are aware of the allergen alert system
 ↓55% Wave 15



22% have signed up for alerts



37% would still eat food with a label saying 'may contain' something they are allergic to

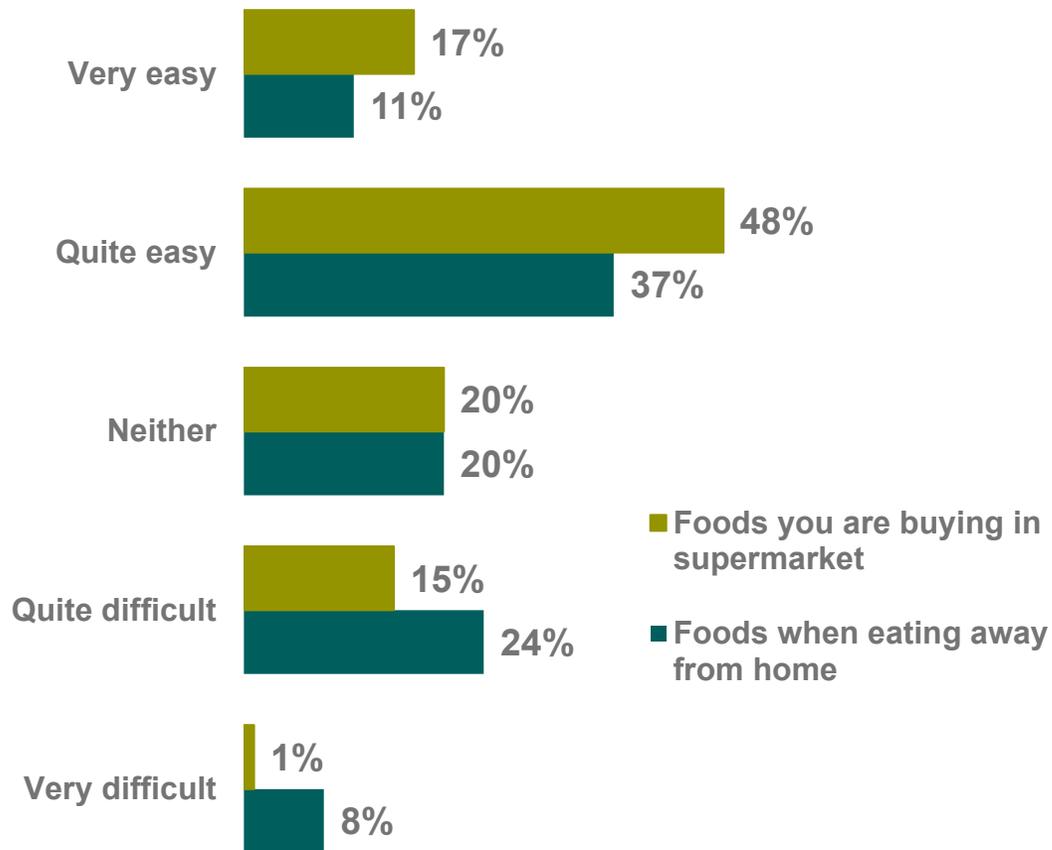


Frequency of carrying EpiPen / Auto injector

- 17%** always
- 19%** sometimes
- 35%** never
- 29%** do not need one

Finding allergy information is considered easier when buying food in supermarkets than when eating out of home. Allergy information is found through different sources depending on the location / situation.

Ease of Finding Allergy Info

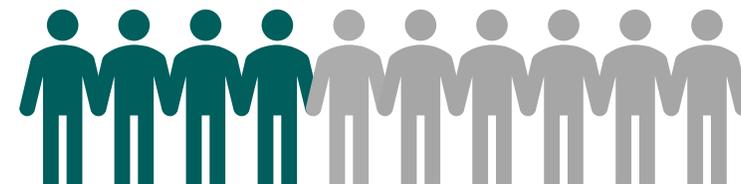


Main Sources of Allergy Info

	Shopping	Eat out/ delivery	Food on the go
Ask staff for info	31%	61%	48%
Labels on food	73%	25%	47%
Info on menus	n/a	49%	33%
Restaurant/store website/app	17%	9%	N/A
Other in restaurant/store info	17%	13%	13%

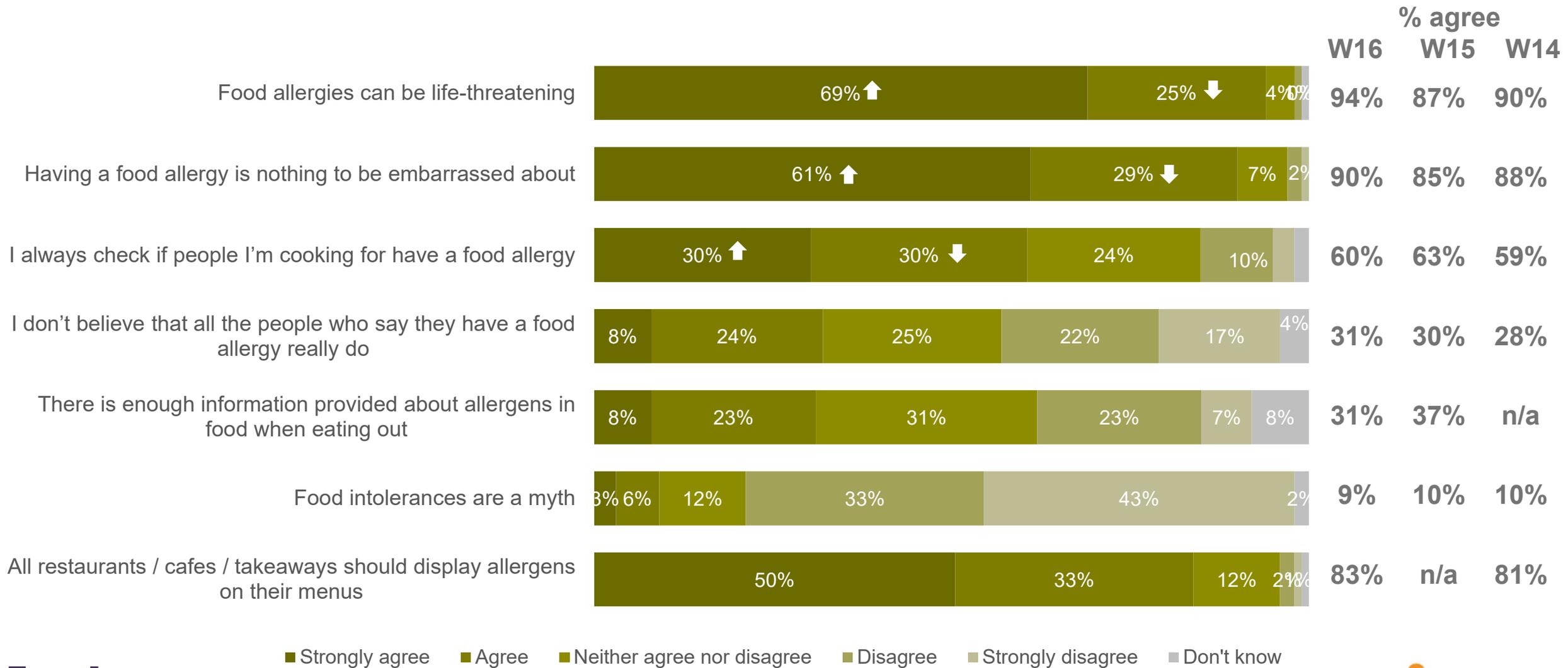
Most feel comfortable talking about their food allergies with friends but adults are a bit less likely than children to disclose food allergies when eating out or purchasing food on the go. Almost 2 in 5 with food allergies feel it's easy to avoid allergens when ordering takeaways.

Allergy Behaviours



39% of those who have food allergies think it's easy to avoid food allergens when ordering a take-away

Consumers in general understand that food allergies can be serious and don't feel there should be any stigma attached. Many will routinely check if people they are cooking for have food allergies and a majority feel allergens should be displayed on all menus. Sentiment across several measures is strengthening.



Allergens – Summary

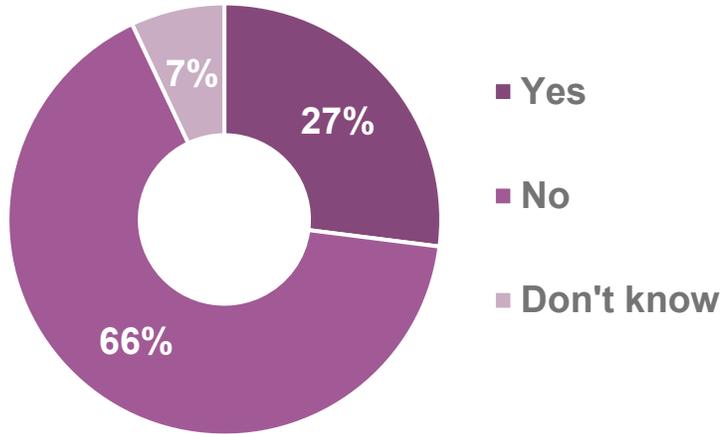
- Data on allergens is again very consistent with previous waves
- 14% of households contain at least one person with a food allergy – many having been formally diagnosed by a health professional
- Those with food allergies are generally comfortable to discuss these and usually inform staff when eating out, however many will take risks, either not carrying an EpiPen or continuing to eat food that ‘may contain’ foods they are allergic to
- Awareness of the allergen alert service overall has dropped this wave, although the numbers signed up to this is consistent at 22%
- Consumers still find it more difficult to find information about allergens in food purchased out of home than when buying food from supermarkets – using a variety of information sources
- Attitudes amongst the general public show widespread acknowledgement of the potential severity of food allergies and agreement that there should be no stigma attached – with some signs of further strengthening of attitudes this wave.

Other topics



More than a quarter of consumers remember seeing food recall alerts in the past year, almost half of them attribute this to a news outlet, with more than a third saying they saw the notice in store. 1 in 6 are aware of the text alert system, a decrease on last wave.

Remember any alerts about food recalls



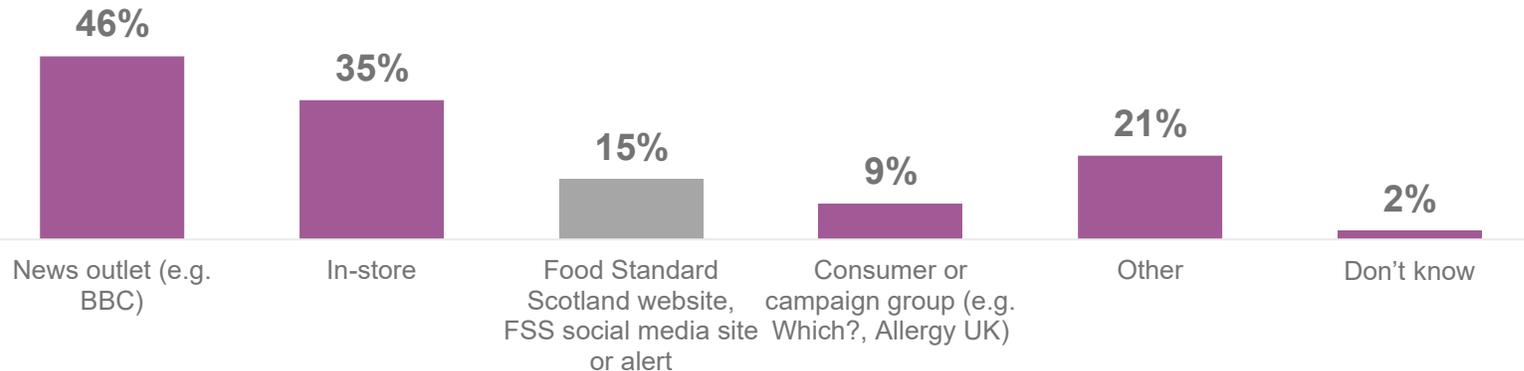
17% aware of text alert system to notify consumers of products being recalled

↓22% Wave 15



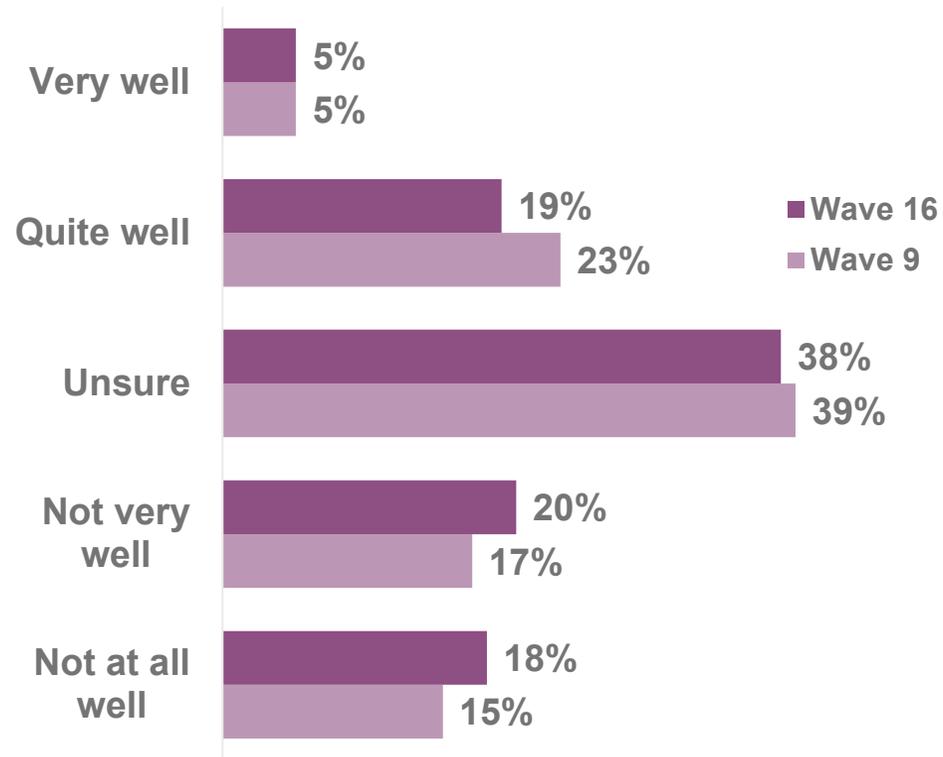
6% aware & have signed up

Where recall notice seen

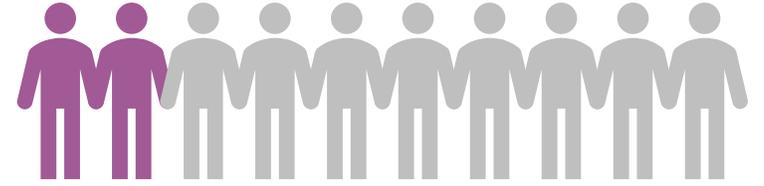
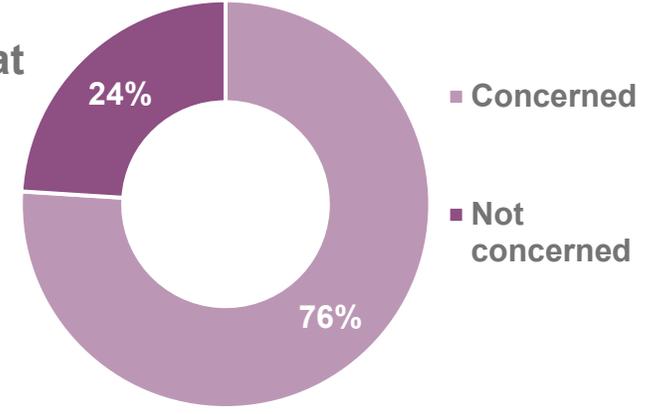


1 in 5 consumers suspected something they had eaten or drunk wasn't what it said on the label, but most are not concerned about this. Just under a quarter feel they understand what food crime is very or quite well.

Understanding of Food Crime



Food not being what the label says it is

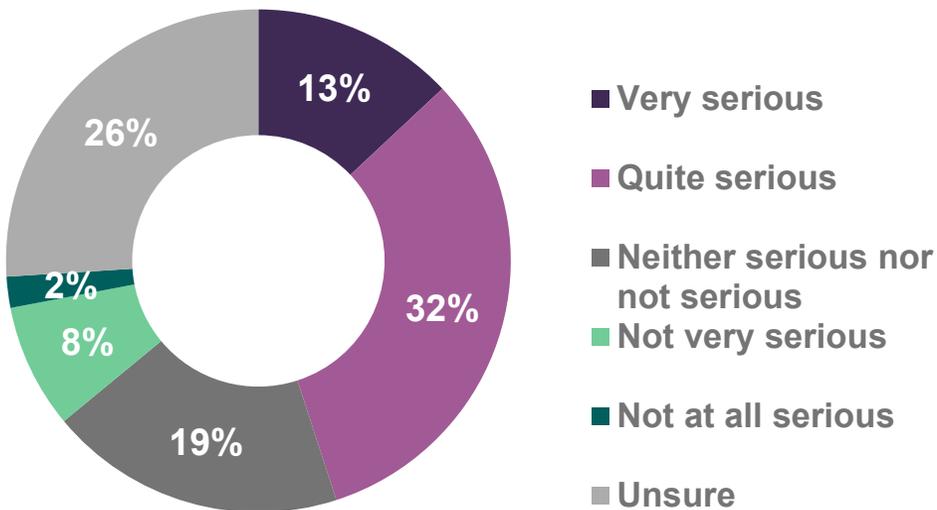


20% of respondents suspected that they had eaten/drunk something that wasn't on the label (a significant uplift compared to 13% at Wave 9).

Higher amongst younger age groups (16-24yrs 31%); and those with a food allergy (50%)

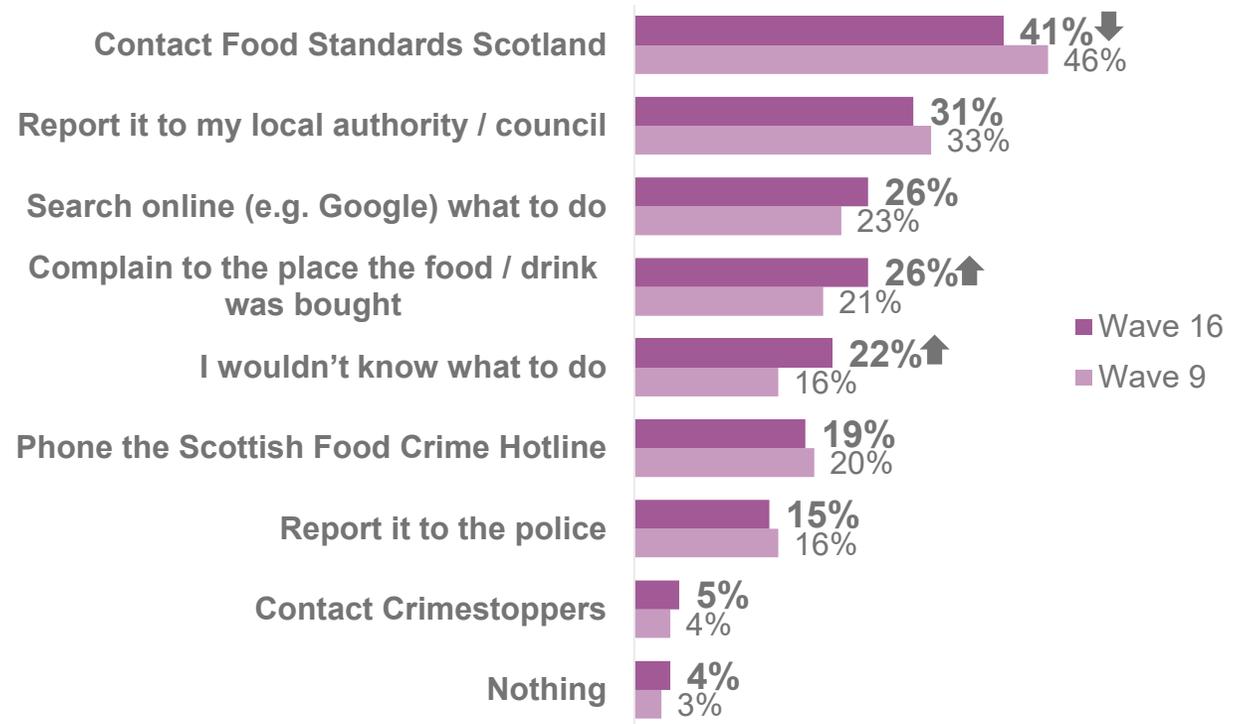
45% of consumers think food crime is a serious problem in Scotland, however many were unsure. FSS and local authorities were most likely to be selected as the places to report a food crime, with just under 1 in 10 aware of the Scottish Food Crime hotline. Data is consistent with the last time these questions were asked (Dec 2018).

How Serious a Problem is Food Crime?



41% very/quite serious Wave 9

Action if Became Aware of a Food Crime



9% were aware of the Scottish Food Crime Hotline prior to completing the survey



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