

# Food in Scotland Consumer Tracking Survey Wave 7

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 2016, 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.
- This document outlines key findings from Wave 7 (food safety and authenticity), conducted by JRS research consortium.

# 2. Methodology

- The research methodology was designed to be consistent with previous waves to ensure comparability.



Online survey



Representative sample of  
**1,046** Scottish adults



30mins questionnaire length



7th-20th December 2018

- 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

## Conclusions

- 6 in 10 Scots are aware of FSS – an awareness level that has remained fairly consistent over the past couple of years
- the FSS brand is now well established.
- Those who know of FSS have a broad idea of the organisation's responsibilities (largely relating to food safety and authenticity)
- Those who are aware of the organisation positively endorse FSS' performance, particularly relating to food safety

# Food Safety at Home

## Conclusions

- Food safety and hygiene practices at home are ingrained, and do not show much change over time
- Consumers feel they know / have access to information about food hygiene and safety
- But their behaviour shows that in several areas improvements are required, particularly:
  - Defrosting & correctly storing meat
  - Not washing poultry / meat
  - Washing raw fruit / veg
  - Checking fridge temperatures & turning down when full
- In addition, they are less switched on about the risks of food poisoning from food prepared in their own home
- Evident complacency and lack of drive to change

# Food Out of Home

## Conclusions

- Eating out is extremely common / frequent for the majority of consumers
- Food eaten out of home is recognised as being less healthy than that eaten at home
- Perhaps related to this, support is evident for calories to be displayed on menus
- Information on allergens is not always easy to find in the out of home environment
- Promoting consistent provision of this information by out of home establishments is recommended.
- FHIS is widely recognised, and continuing to grow in influence.
  - Growth is also evident in those mentioning hygiene certificates and stickers as a means to judge hygiene standards.

# Food Labelling & Authenticity

## Conclusions

- Consumers tend to believe they understand food labels
  - But are mostly using labels to find information on best before / use by dates
- Those looking for specific information on allergens find the information on food labels less clear
- Use by dates are widely recognised as the best date indicator of food being safe to eat
  - But this is still only one of several methods used, including looking, smelling and tasting
  - And use by dates are not always used / heeded
- Further education on how best to check whether food is safe to eat would be beneficial
- There is a sense that not much is known about food crime
  - Both in terms of prevalence and action
- FSS and local authorities are the key organisations that consumers would contact regarding food crime.

# 4. FSS Awareness, Knowledge & Trust



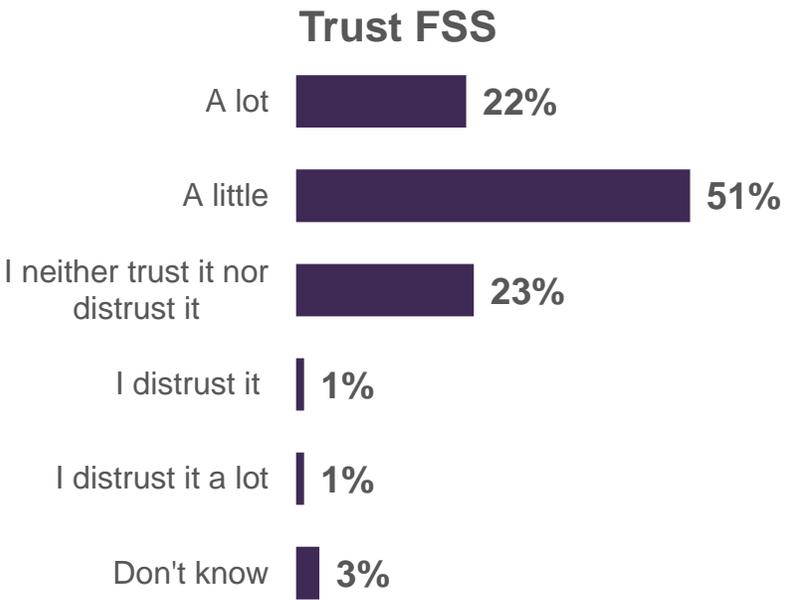
This question set is designed to measure performance on the following strategic priorities:

- 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, including Brexit.

# 6 in 10 Scottish adults have heard of Food Standards Scotland and almost three quarters of them trust FSS to do its job.

## Aware of Food Standards Scotland (60%)



**73% Trust FSS**

↓ v 83% Wave 6 \*

- Levels of trust were higher amongst some demographic groups:
  - those in socio-economic group C1
  - those with dietary requirements
  - those who eat healthily most of the time
  - those responsible for all/most of the cooking and food preparation
- \* Wave 7 shows a drop in levels of trust in FSS, with more consumers saying they neither trust nor distrust FSS.
- Due to a number of changes at Wave 7 it is not possible to conclude whether this is a definitive pattern; we will be able to draw more concrete conclusions after Wave 8.
- Awareness levels were broadly consistent across demographic groups, with two notable exceptions where awareness was higher:
  - those with kids at home
  - people with dietary requirements
- Wave 7 awareness was at a similar level to that seen in Waves 3-6, reflecting that the FSS brand is now well established amongst the Scottish population.

# Consumers primarily understand FSS' remit as being to ensure food is safe to eat and to improve industry standards. Food authenticity is also viewed as a key responsibility.

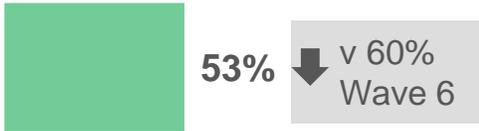


## Food is Safe

Ensuring the food you buy is safe to eat



Promoting food safety in the home



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



Data has remained consistent with Wave 6 on all but one measure – promoting food safety in the home – where scores have declined.



## Food is Authentic

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



Country of origin labels, which identify where food comes from



## Healthier Diets

Nutrition labelling information on food packaging



Promoting and enabling healthy eating



## Responsible Food Businesses Flourish

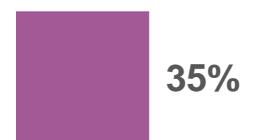
Working with the food industry and business to improve standards



Overseeing inspections of restaurants and other food businesses for food hygiene



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



# Those aware of FSS rate the organisation highly, particularly in relation to ensuring food is safe to eat - the area consumers most associate with FSS. High ratings are also evident for FSS' expertise, action and responsiveness, and for acting in the best interests of Scots.

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

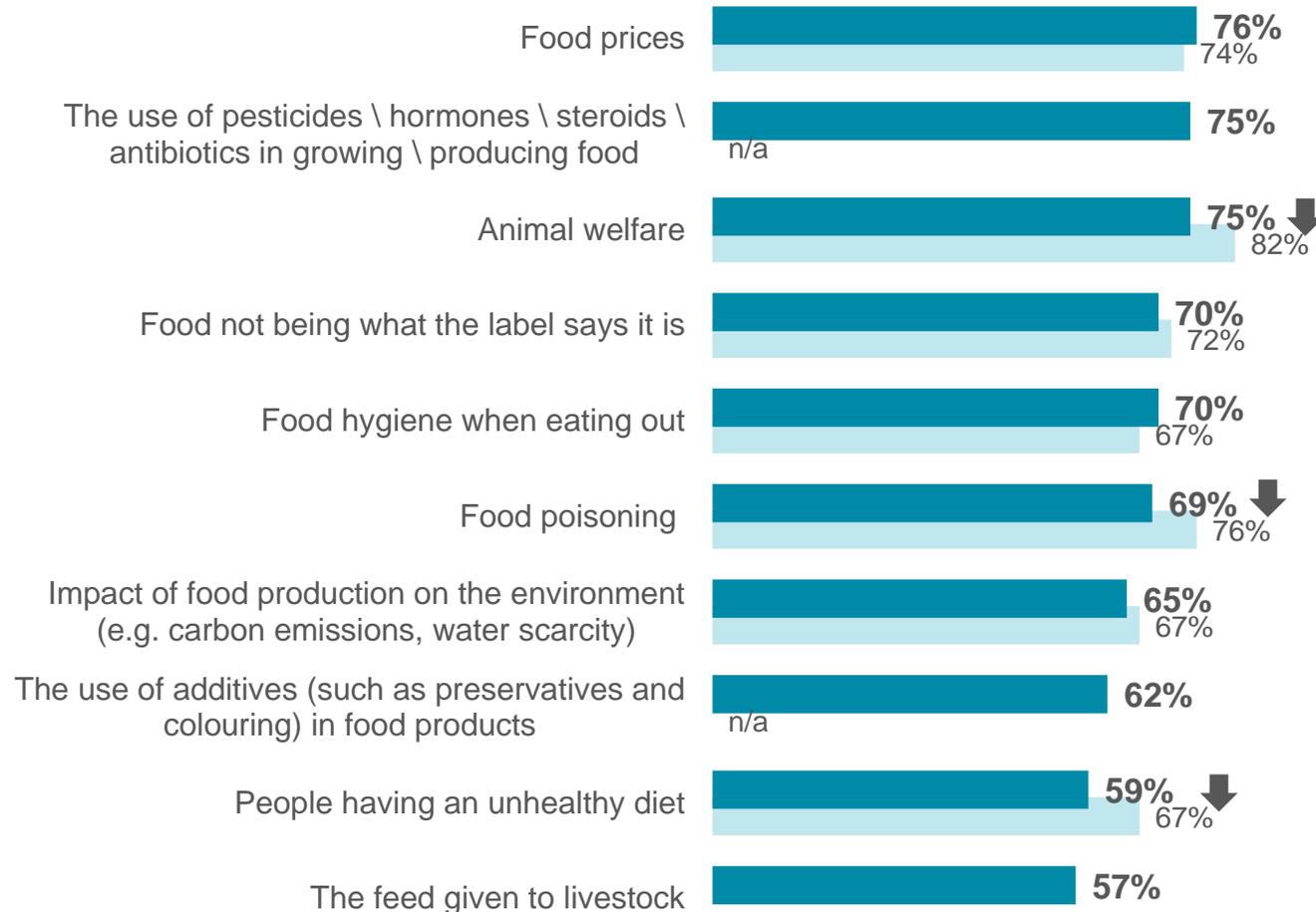


- Ratings of the performance of FSS are high across the board.
- More than two-thirds of those aware of the organisation rate performance on each measure as 'excellent', 'very good' or 'good'.
- Data is very consistent across demographic groups.
- Wave 7 data does however show a decline on several measures compared with Wave 6, which will be closely monitored in future research.

# Key food-related issues causing concern to consumers relate to food prices, the use of chemicals in food production and animal welfare. Food hygiene when eating out of home and food poisoning are further areas of concern, as is food crime.

## Top 10 areas of concern

## % saying 'causes concern'

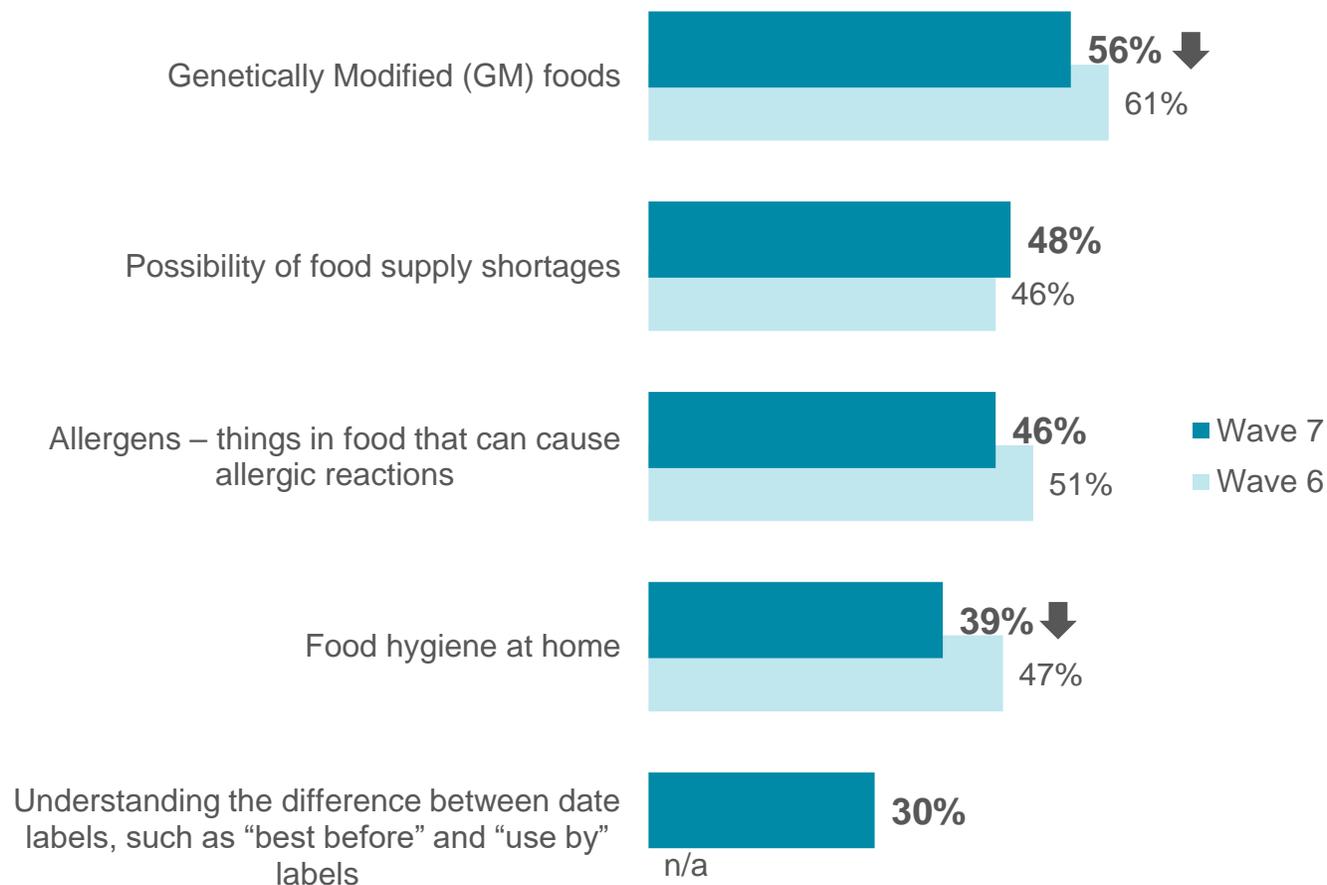


- Some demographic differences were evident in the levels of concern shown about these food issues.
- Females were more likely than males to be concerned about most issues.
- Younger age groups (16-34yrs) were less concerned about pesticides or the use of additives in food products.
- Those aged over 65yrs were the most concerned group about food not being what the label says.
- Younger age groups (16-34yrs) were less concerned about livestock feed.
- Levels of concern dropped on some measures compared with Wave 6.

**Levels of concern around GM foods have declined, as has concern around food hygiene at home. Conversely, concern over the possibility of food shortages has grown steadily over the past 3 years, likely a reflection of uncertainty around Brexit.**

## Other areas of concern

### % saying 'causes concern'



- Those aged over 45 years were the least concerned group about food hygiene at home.

**The majority of consumers expect Brexit to have a negative impact on food prices, and a significant proportion expect the availability of food to worsen (+11% vs previous wave). Concerns around availability have significantly increased over the past 2 years.**

**% saying Brexit impact will make food issues worse**



**Price**  
**61%**



**Availability**  
**40%**

↑ v 29% Wave 3



**Fraud**  
**28%**



**Sustainability**  
**25%**



**Safety**  
**20%**

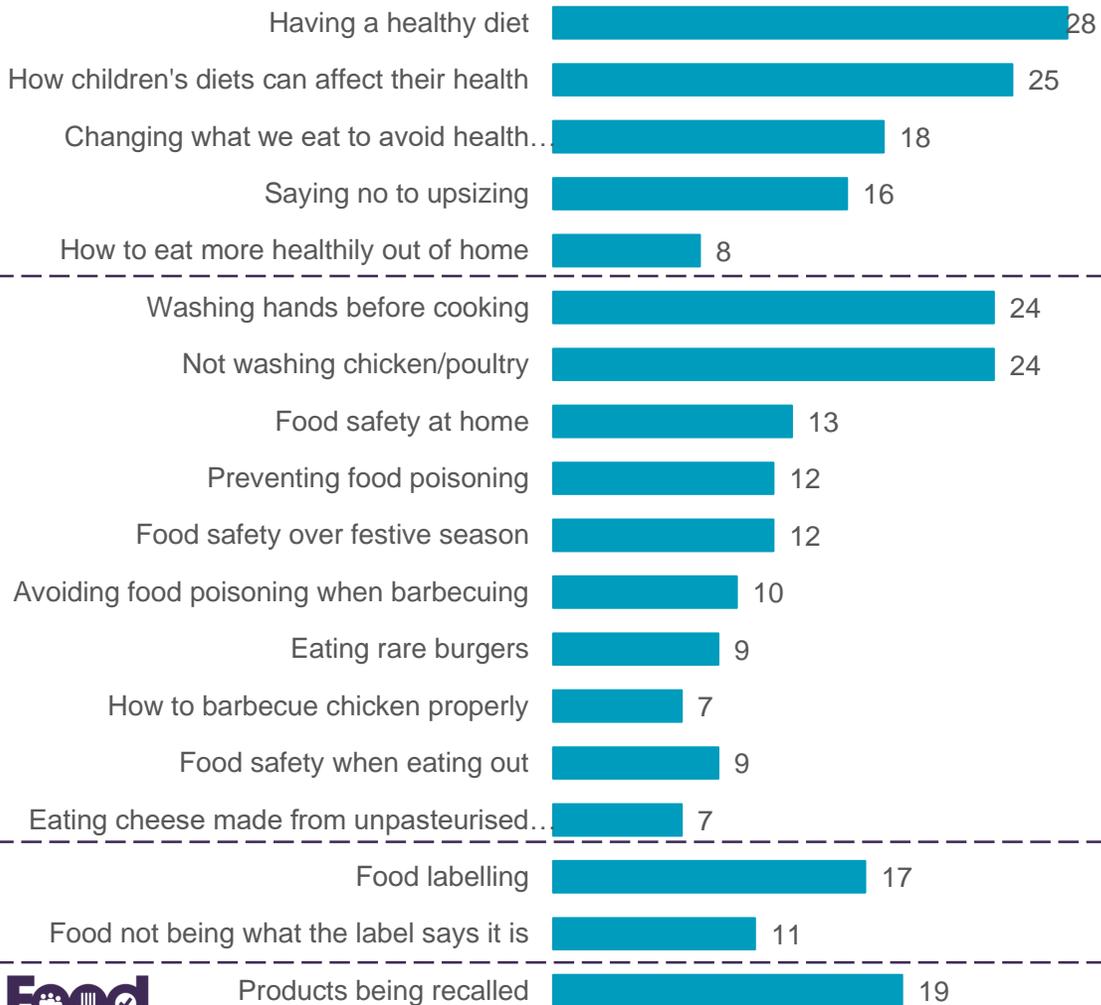


■ It will improve ■ There will be no change ■ It will get worse ■ Don't know

• Males were more positive than females on all counts, with females more likely to be unsure about the likely impact.

# Consumers recalled advertising/publicity across a wide variety of topics relating to food, particularly around healthy eating. Awareness of food safety (Kitchen Crimes) messaging and the NoToUpsizing campaign was evident.

## Seen advertising / publicity recently



Healthy eating  
48%

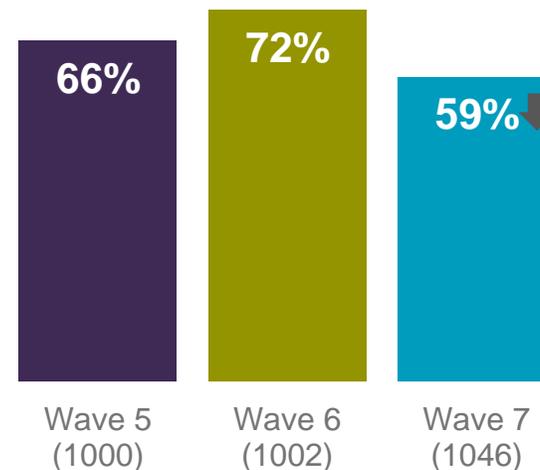


Food safety  
50%



Food labelling  
22%

## Overall Awareness



The decrease in overall awareness levels is largely driven by a reduction in the recall of healthy eating messaging compared with W6 when the NoToUpsizing campaign had been on air immediately before fieldwork.

# 5. Food Safety



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

→ Food is safe

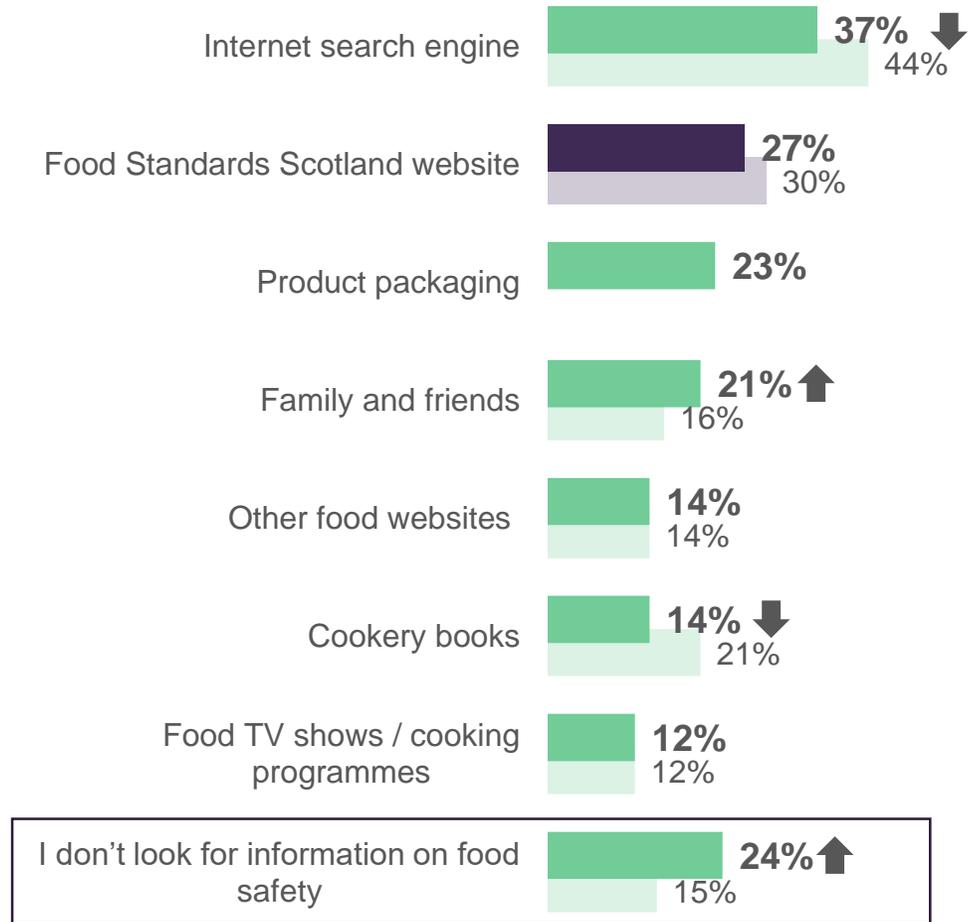
This incorporates food safety and hygiene behaviours when preparing and cooking food at home, as well as measuring incidence and suspected sources of food poisoning.

**Almost all consumers feel they have clear information on how to prepare and cook food safely, however a quarter admit to not looking for food safety information, suggesting complacency. For those who do seek information, search engines and FSS website are the favoured sources.**



**91%** have clear information on how to prepare and cook food safely and hygienically

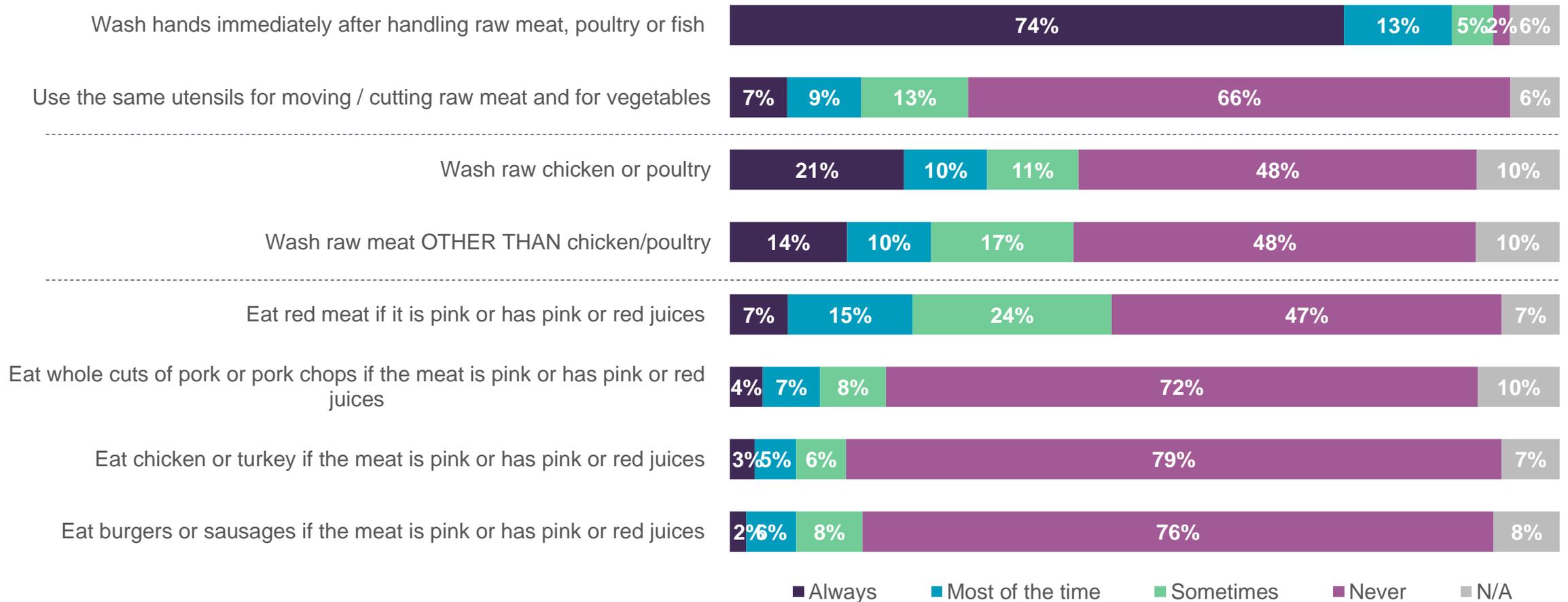
### Information Sources



\*sources with >10% mentions

**Hygiene practices appear to be well established when it comes to handling meat, however some confusion remains around correct protocols for washing chicken and other meats. Most will never eat poultry, pork, burgers or sausages if the meat is pink.**

### Frequency of Undertaking Safe Food Behaviours

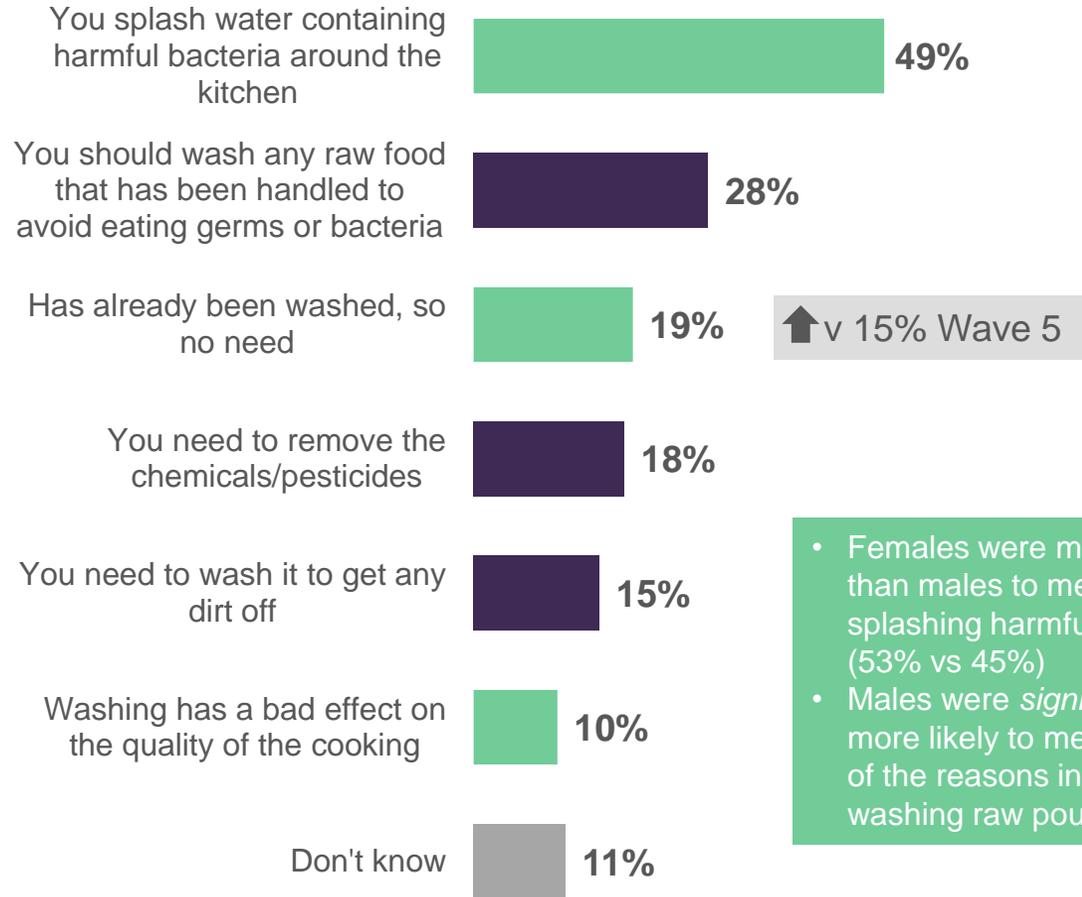


# Half of consumers never wash raw poultry, and understand the dangers of splashing bacteria. However, confusion remains for 51%, with males particularly likely to give reasons in support of washing raw poultry.

48% said they NEVER wash raw poultry



## Views on Washing Raw Poultry

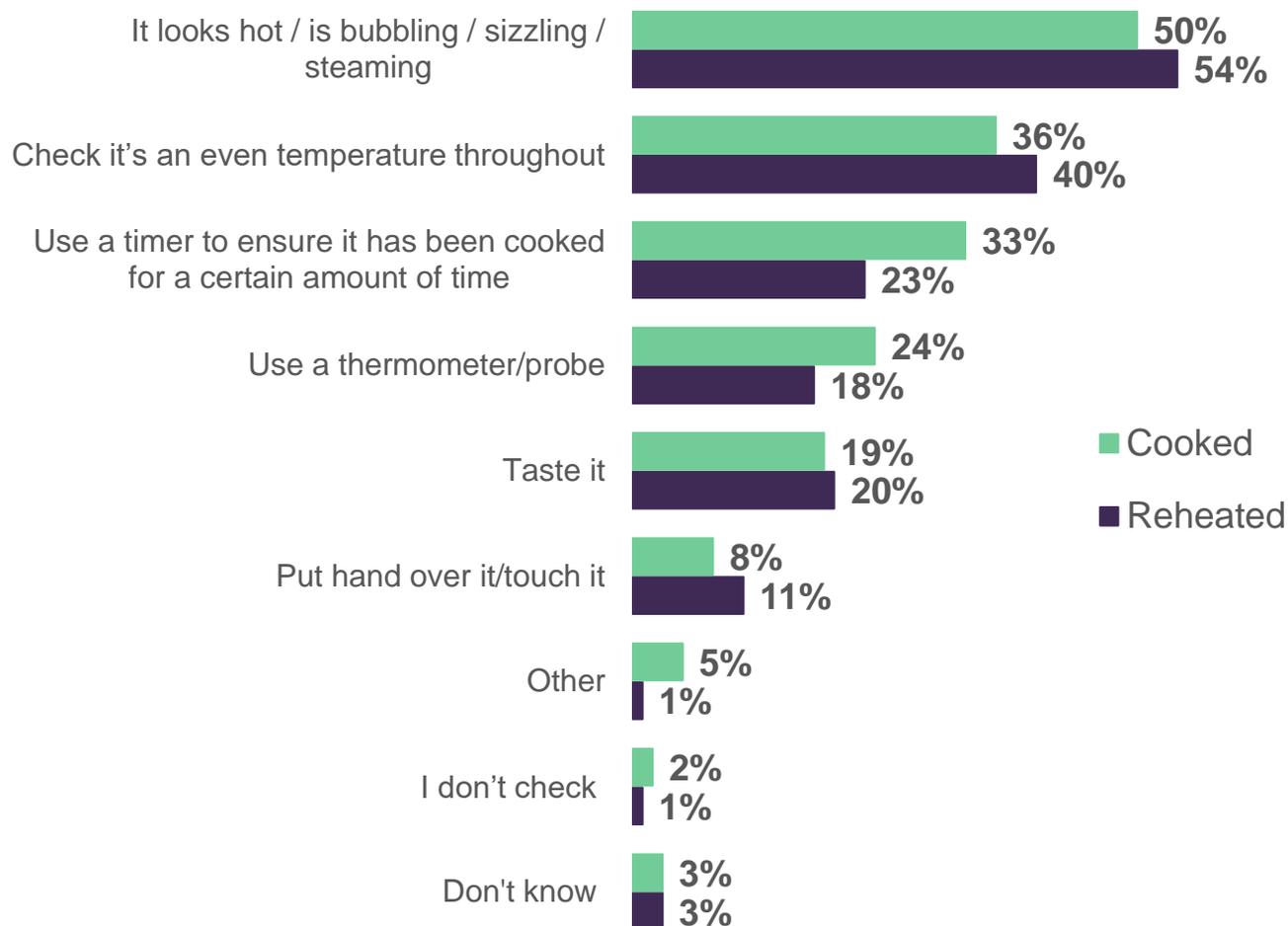


- Females were more likely than males to mention splashing harmful bacteria (53% vs 45%)
- Males were *significantly* more likely to mention each of the reasons in favour of washing raw poultry.

Note: FSS guidance states poultry should not be washed as this does not get rid of germs and may splash harmful germs onto worktops / utensils.

**Consumers test if food is properly cooked or reheated in similar ways. The most popular method is visual, in both cases. The vast majority will only reheat food once.**

### Telling if Food is Cooked / Reheated Properly



### Number of Times Reheat

Not at all	11%
<b>Once</b>	<b>77%</b>
Twice	7%
3+ times	3%

Note: FSS guidance states food should always be checked to ensure it is steaming hot in the middle. Food should not be reheated more than once.

**Just over a quarter completely fill their fridge always / most of the time, and a similar proportion turn down the fridge temperature when it is full. Almost three-fifths said they NEVER store open tins in the fridge.**



Completely fill my fridge



Turn down temp to make fridge colder when full



Store open tins in fridge



■ Always ■ Most of the time ■ Sometimes ■ Never ■ N/A

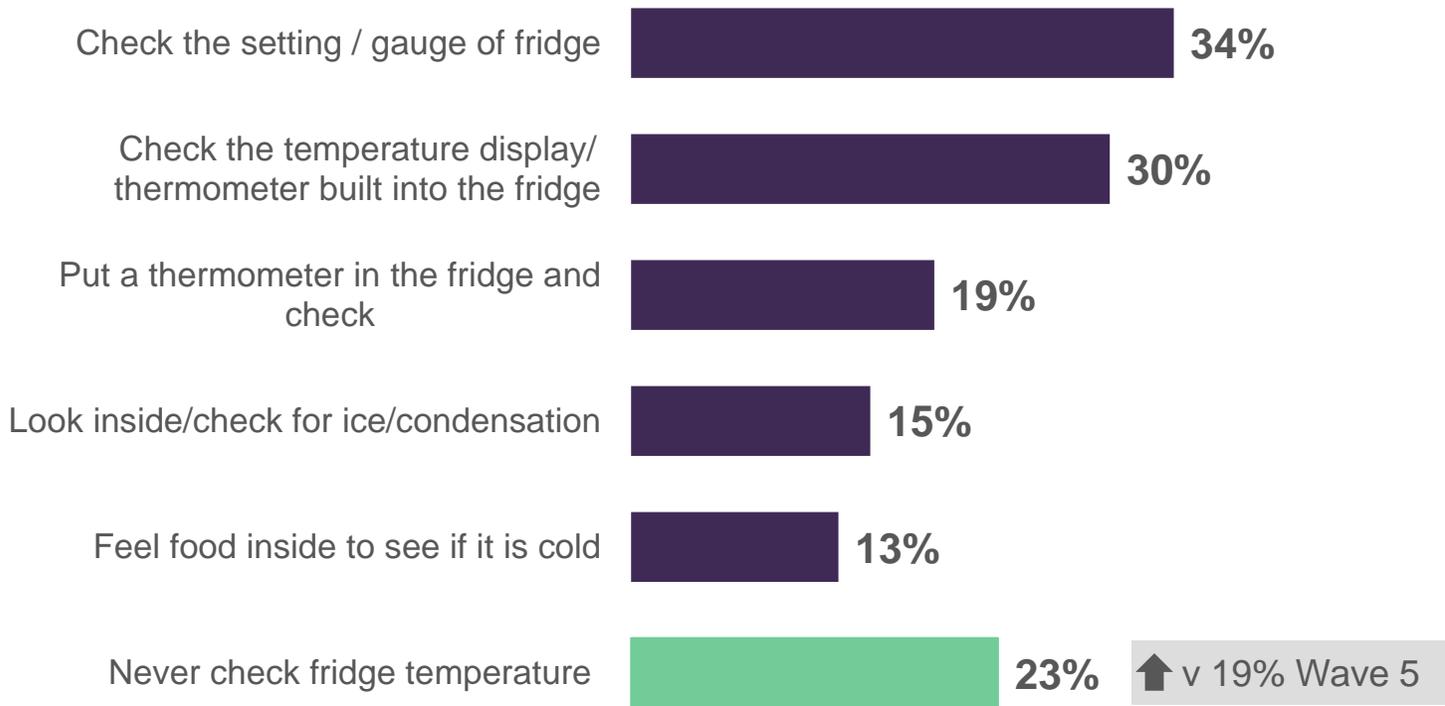
- Those who admit to storing open tins in fridge tended to be in younger age groups (29% of 16-34yr olds store open tins in fridge always/most of the time).

Note: FSS guidance states if fridge is full, the temperature should be turned down and space left to allow air to circulate. Food should not be stored in open tins in the fridge.

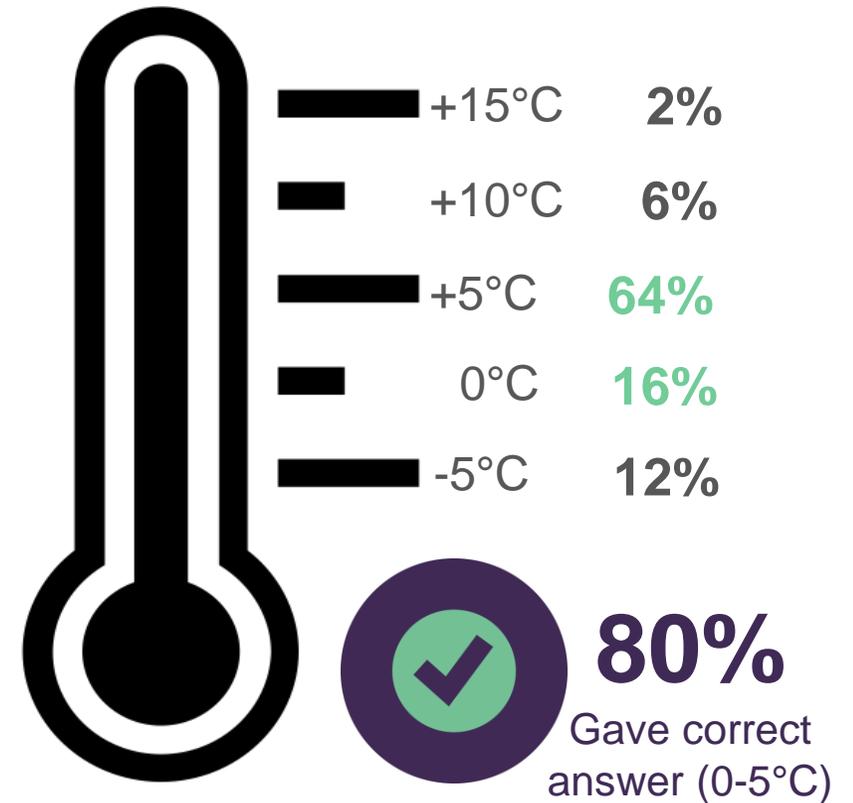
Q19 How often do you do each of the following? Those with responsibility for cooking/preparing food Base: 997

**8 in 10 knew the correct fridge temperature, consistent with previous waves; however a quarter of consumers said they never check this. Those who do check tend to do this by checking the setting. Half use a thermometer – inbuilt or external.**

### Method for Checking Temperature



### Perceived Correct Fridge Temperature

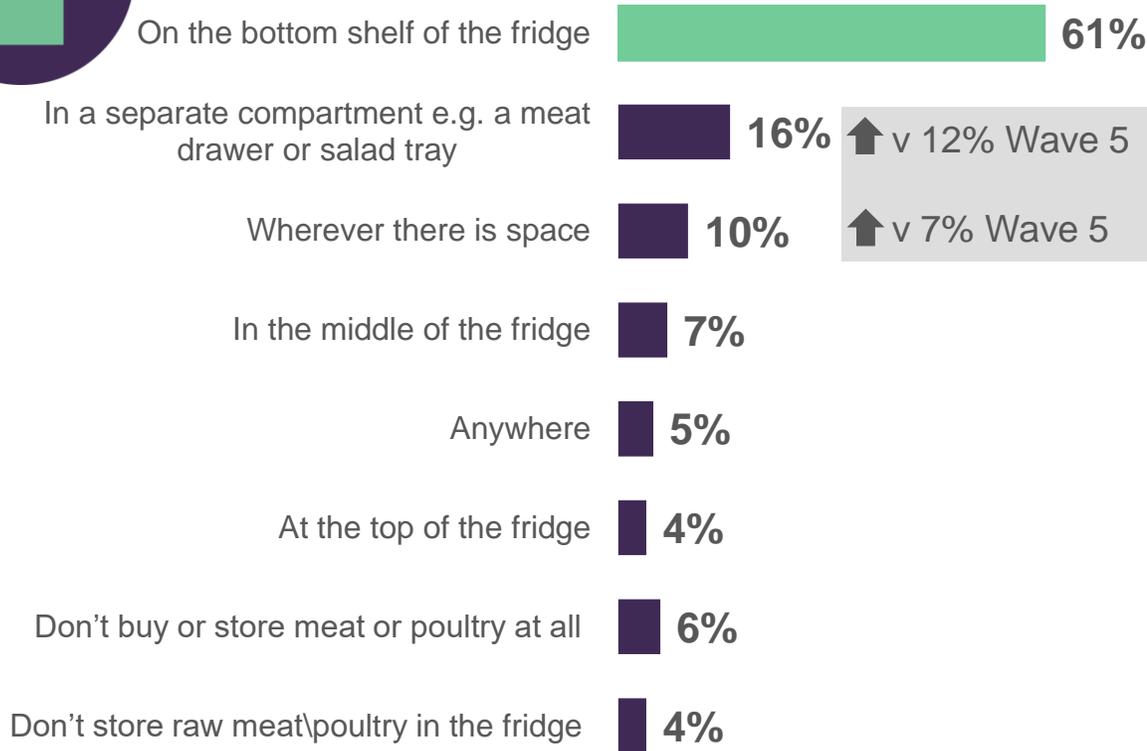


Note: FSS guidance states that fridges should be kept between 0°C and 5°C and temperature checked regularly.

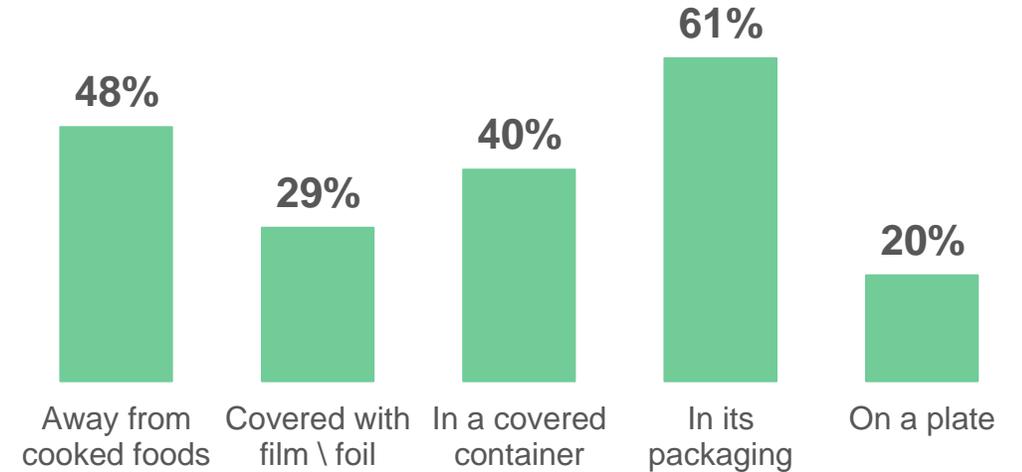
**6 in 10 store raw meat and poultry on the bottom shelf of their fridge. The same proportion say they store raw meat / poultry in its packaging, whilst 40% store it in a covered container. Almost half store it away from cooked foods.**



### Where Raw Meat/Poultry Stored in Fridge



### How Raw Meat/Poultry Stored in Fridge



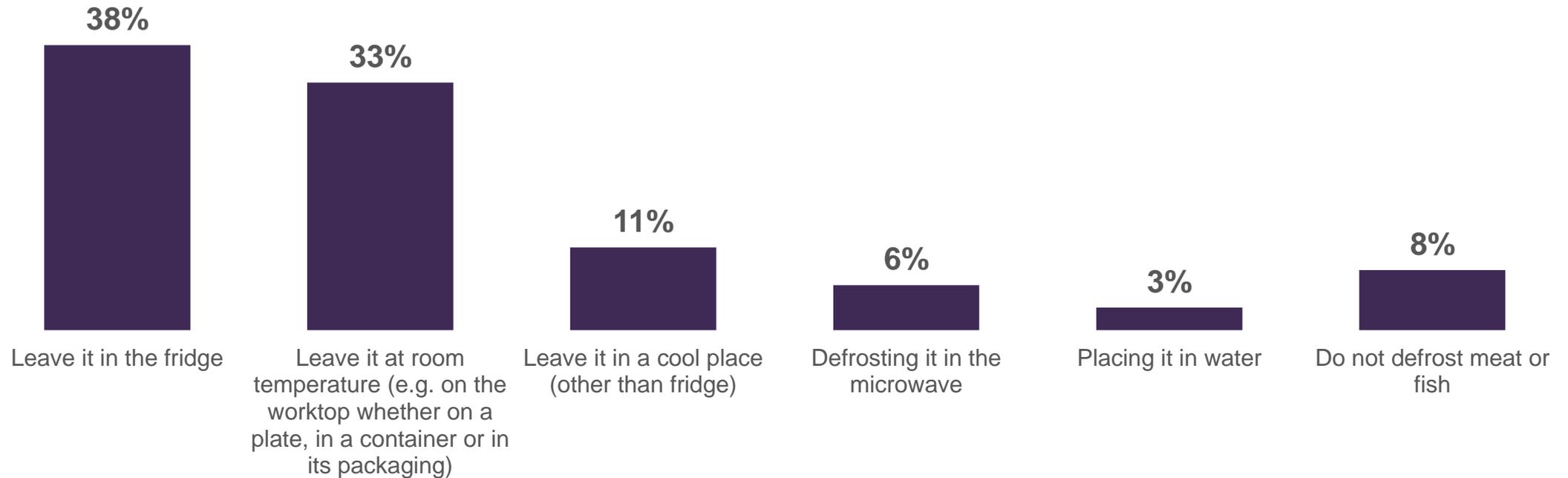
Note: FSS guidance states meat should be stored in a clean sealed container on the bottom shelf of the fridge.

Q24 Where in the fridge do you store raw meat and poultry? Those with a fridge Base:1041  
 Q25 How do you store raw meat and poultry in the fridge? . Those who do store Base:945

**Almost two-fifths of consumers defrost frozen meat correctly, by leaving it in the fridge. However, a third defrost at room temperature.**



### Method Used to Defrost Frozen Meat



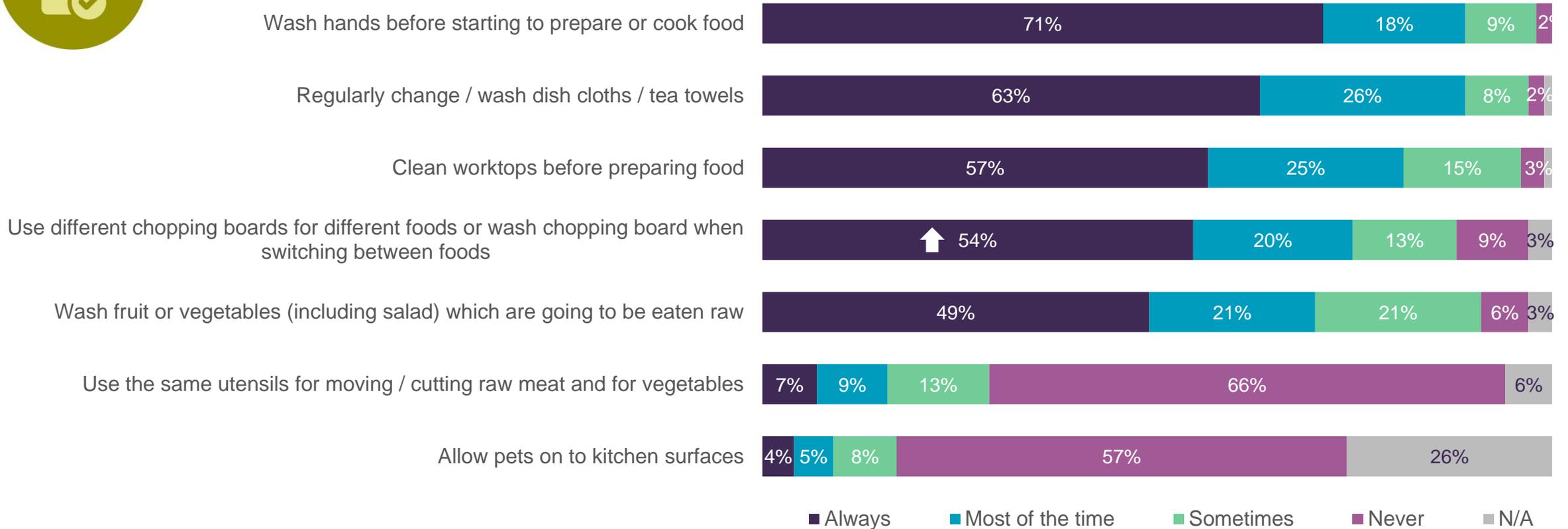
Note: FSS guidance states meat should be defrosted covered or in a sealed container on the bottom shelf of the fridge.

Q21 Which method do you usually use to defrost frozen meat? Those with responsibility for cooking/preparing food Base: 997

# Most consumers with responsibility for cooking in their households follow good hygiene practices. Progress has been seen in the number 'always' using different chopping boards, compared to Wave 5 (+6%)



## Food Hygiene Practices



**The average number of food safety practices followed at home has remained fairly consistent over time, with consumers adhering to 11 of the 18. Washing practices remain most ingrained.**

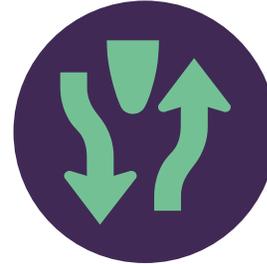
Average number of practices followed:



**Washing**  
(out of 3)



**Refrigeration**  
(out of 4)



**Contamination**  
(out of 6)



**Cooking**  
(out of 5)



**TOTAL**

(out of 18)

**Wave 1**

2.0

2.0

3.1

3.8

11.0

**Wave 3**

2.0

2.0

3.0

3.7

10.6

**Wave 5**

2.0

2.0

3.1

3.7

10.8

**Wave 7**

1.9

2.0

3.2

3.8

10.9

**4% said they had experienced food poisoning in the last year and in a quarter of cases food poisoning was confirmed. Most thought the source of their food poisoning was from food purchased out of home – either eaten in cafés / restaurants or from takeaways.**

**4%**

had experienced

food poisoning in the past year

↓ v 6% Wave 5

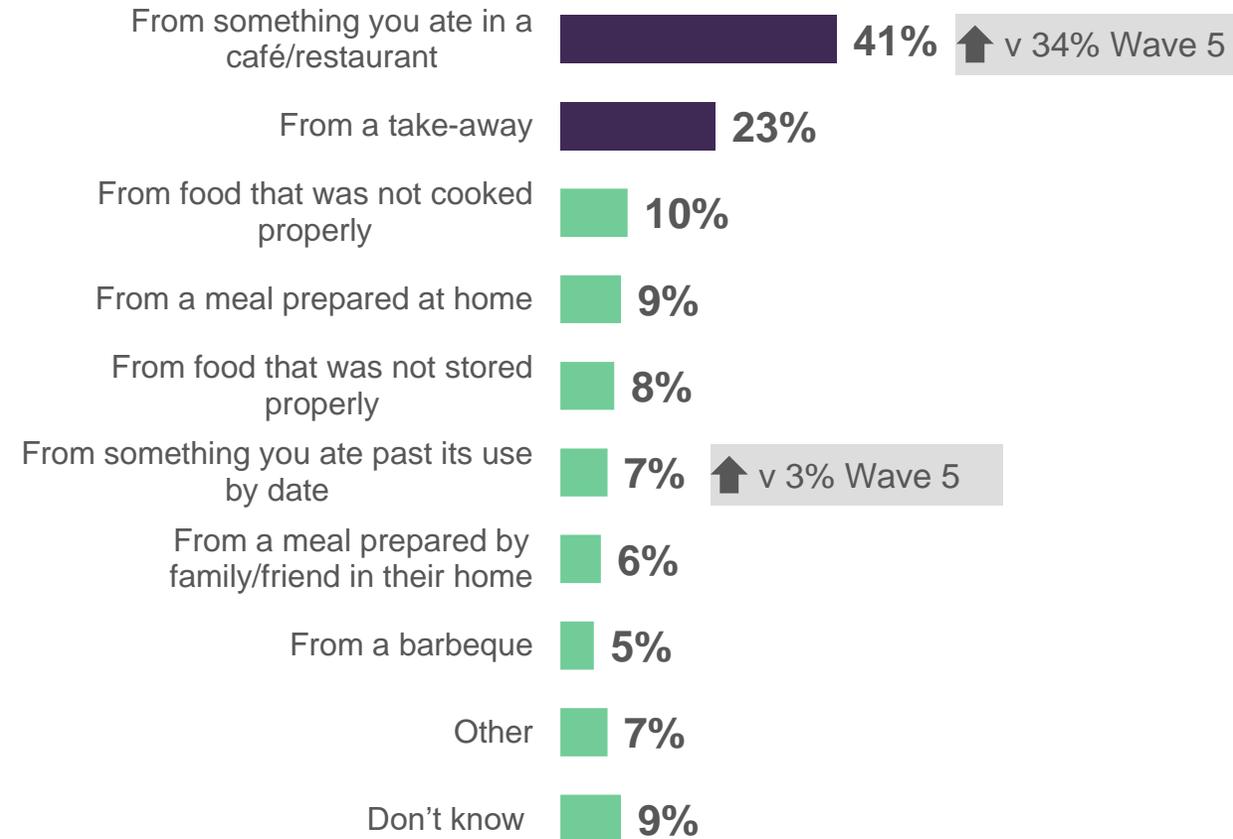


**50%** visited GP

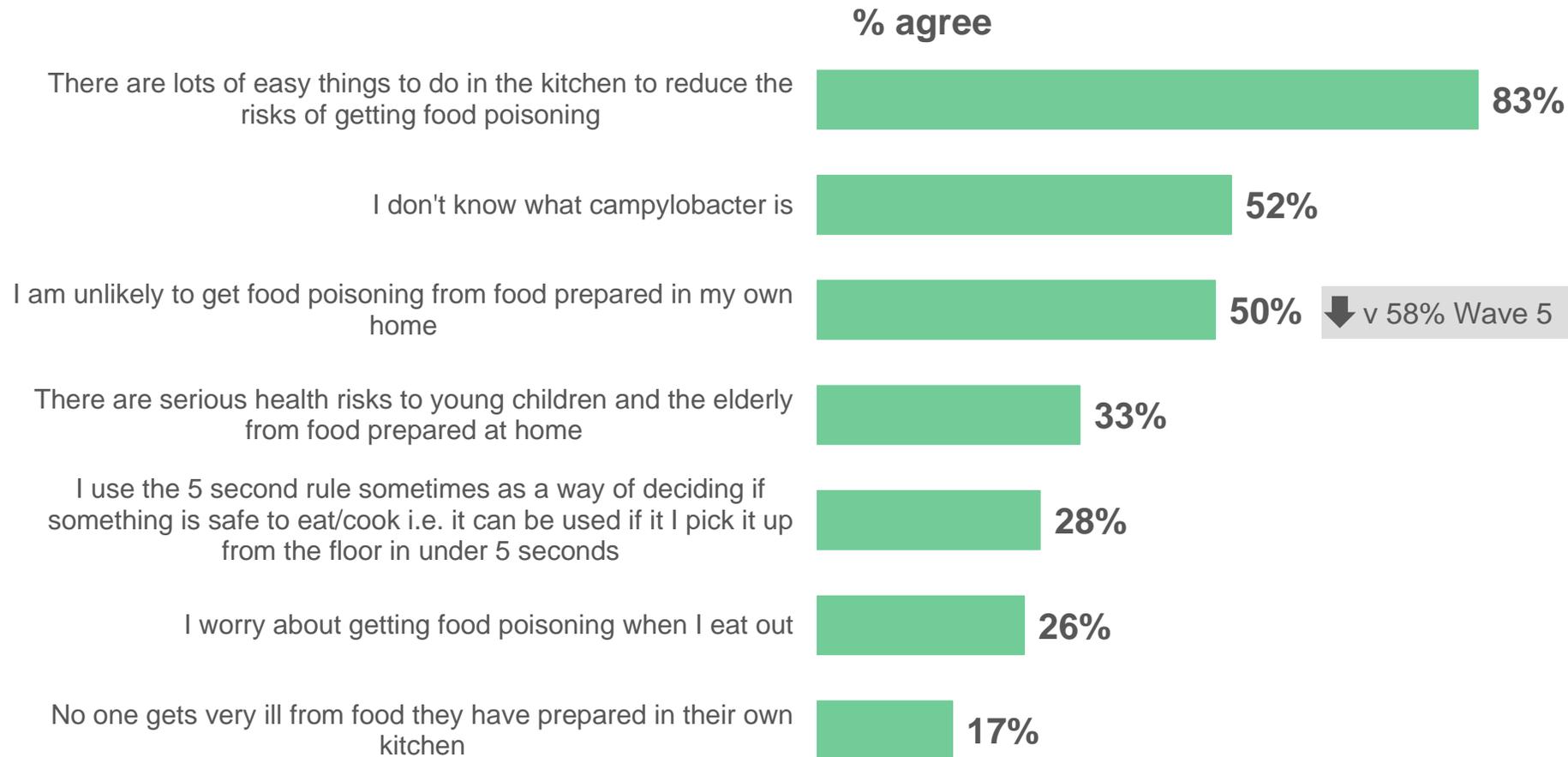


Food poisoning confirmed  
in **24%** of all cases

### Food poisoning source



**Consumers believe that they can take action in the kitchen (easily) to reduce the risk of getting food poisoning. Although there is still a significant level of denial around food poisoning in the home, there are signs of improvement with fewer people believing they are unlikely to get food poisoning from food prepared in their own home compared with the previous research wave.**



# 6. Food Labelling, Authenticity & Food Crime



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

→ Food is authentic

This section focuses on food labelling and, for the first time, introduces questions about food crime.

**8 in 10 consumers think they have clear information on what food labels mean. Most seek information on use by / best before dates, cooking instructions and/or ingredients. Half consider information on food labels to be clear/understandable and half trust the information.**



**81%** say they have clear information on what the labels mean on the food they buy

↑ v 76% Wave 5

**% agree**

I trust the information on food labels

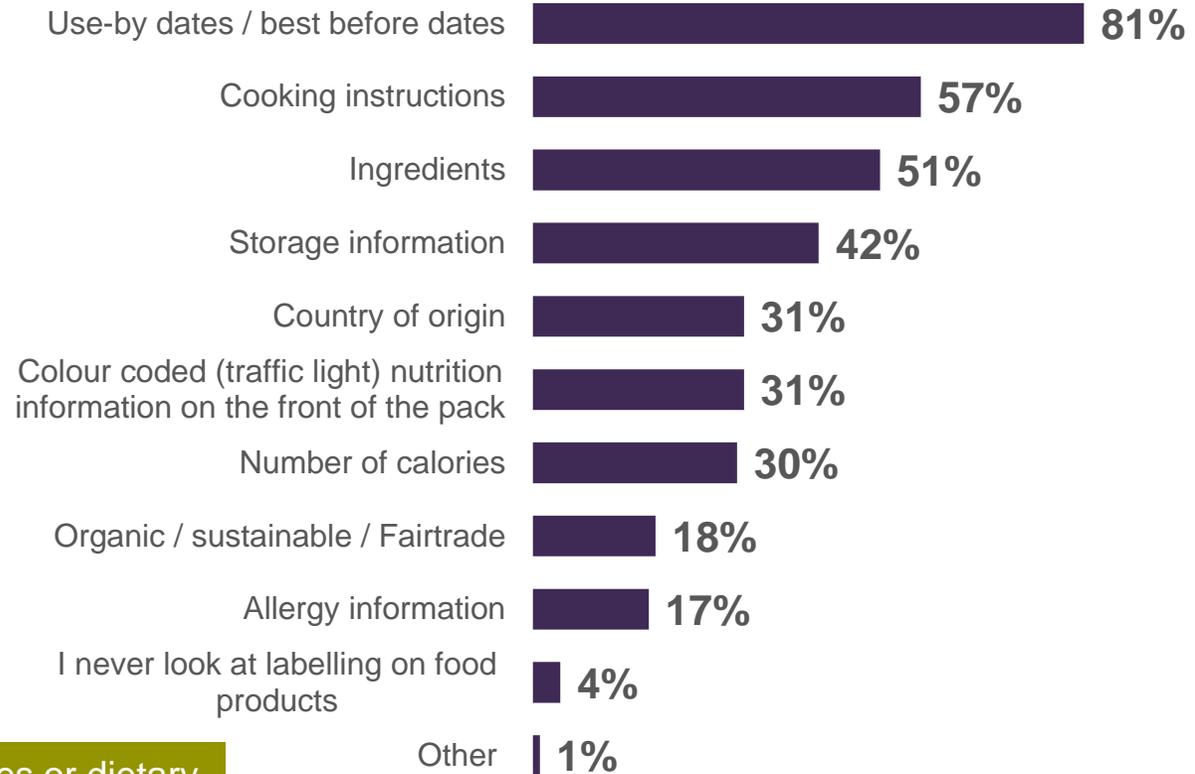
**52%**

The information on food labels is clear and understandable

**54%**

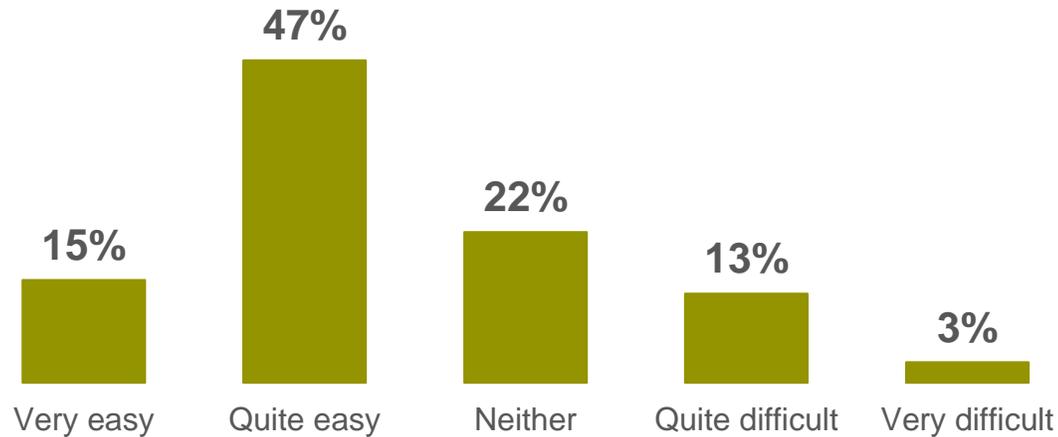
Those with allergies or dietary requirements are more likely than others to disagree that information is clear (14% and 13% respectively)

**Info Gained from Food labels**



**Consumers with allergies find it relatively easy to find allergy information about food they are buying in shops and supermarkets, mainly on food labels, although asking staff for information is also common.**

### Ease of Finding Allergy Info in Shops/Supermarkets

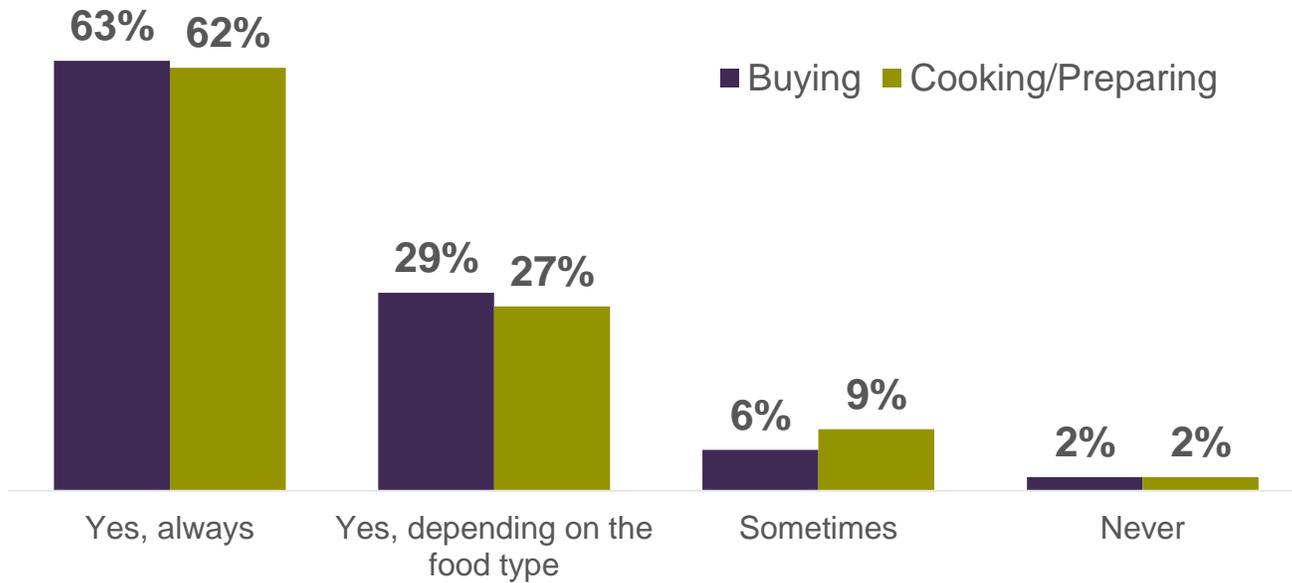


### Main Sources of Allergy Info Out of Home

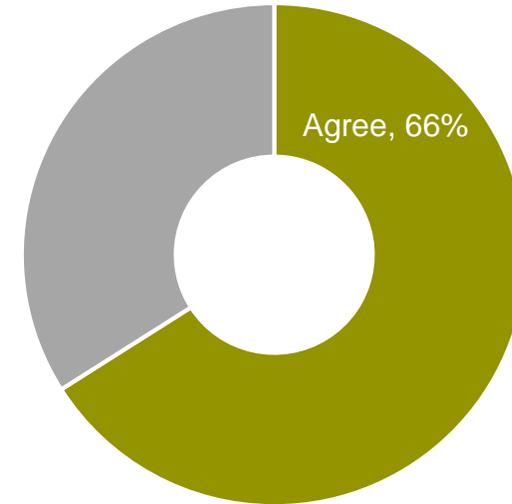


**Just over 6 out of 10 consumers always check use by dates when buying or cooking food, consistent with previous waves of research.**

Checking Use By Dates



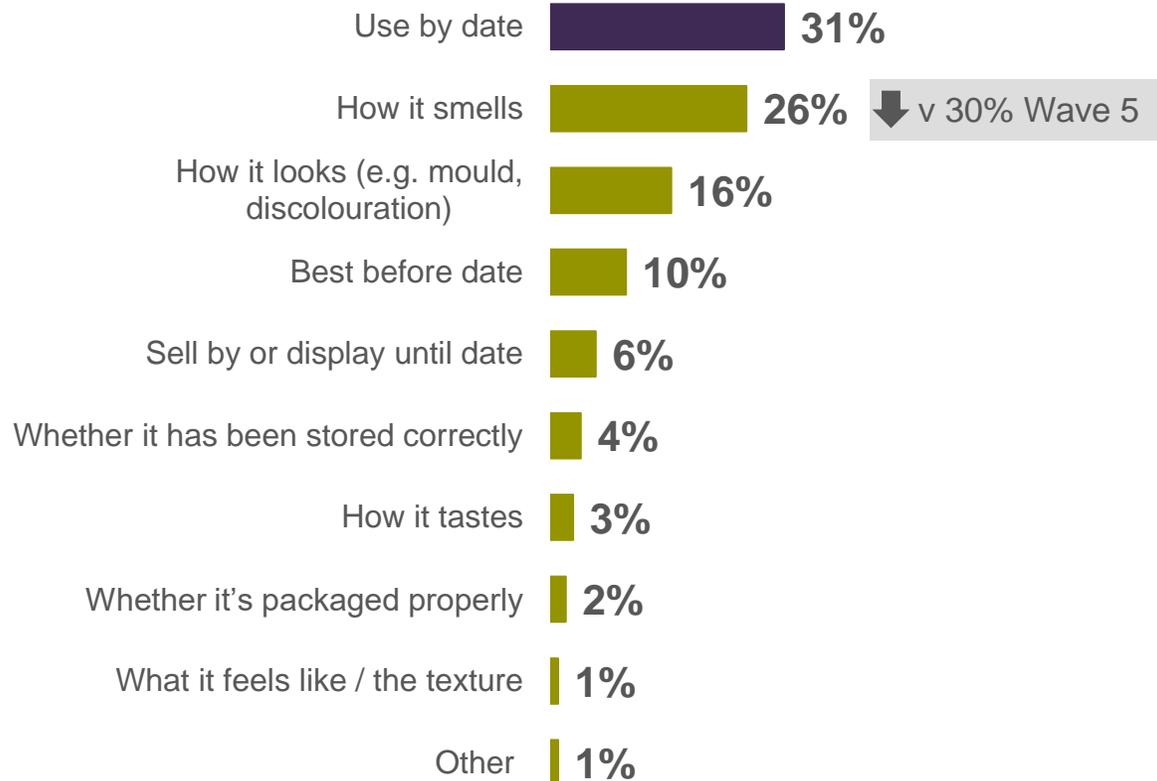
I always follow use by dates



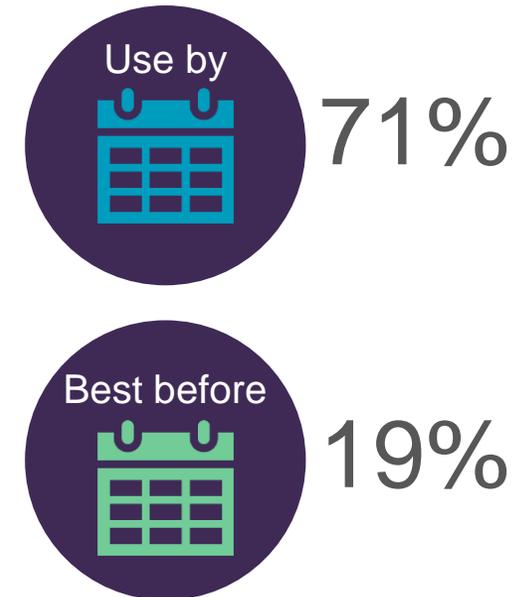
- Those in over 45+yr age groups were most likely to agree that they always follow use by dates

**Almost a third of consumers determine whether food is safe to eat by the use by date, consistent with previous waves. However, checking by how it smells and looks is still relatively common. 7 in 10 consumers think the 'use by' date is the best label indicator of food being safe to eat.**

### Main consideration



### Best indicator of food being safe to eat



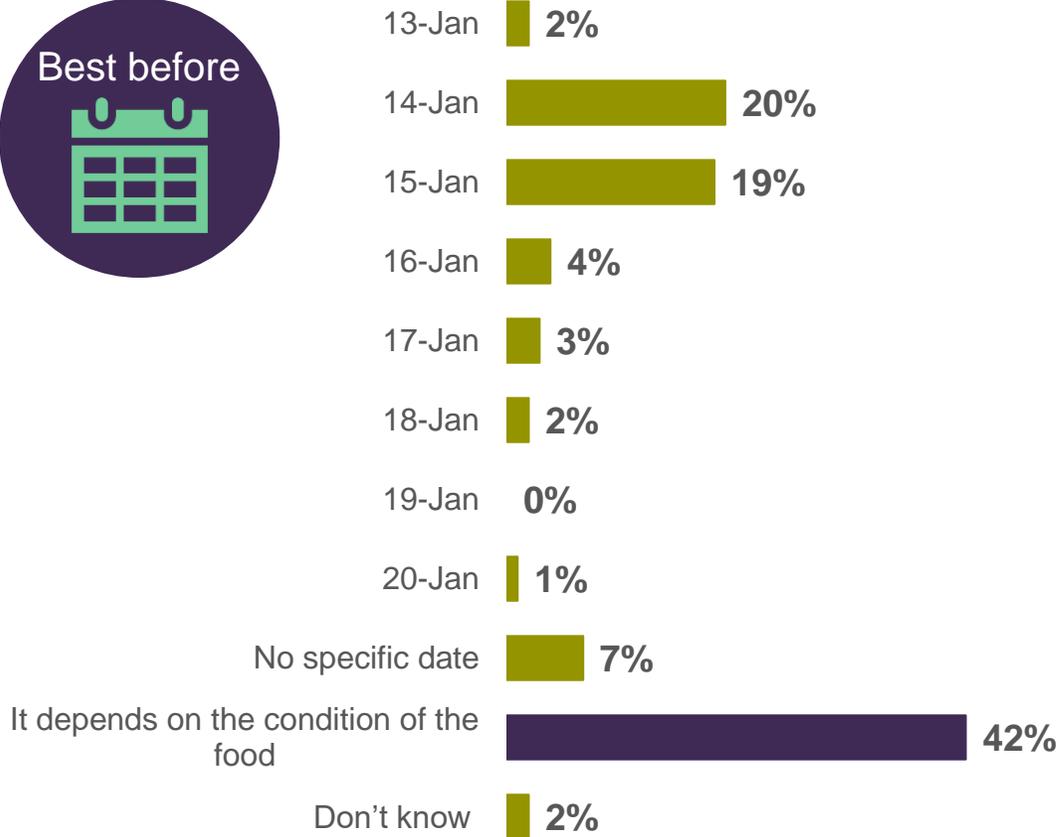
Note: FSS guidance states 'use by' dates should be the main determinant of food being safe to eat.

Q27 In general, what is the main thing you look for or think about when deciding whether a food is safe to eat or use in cooking? Base: 1046

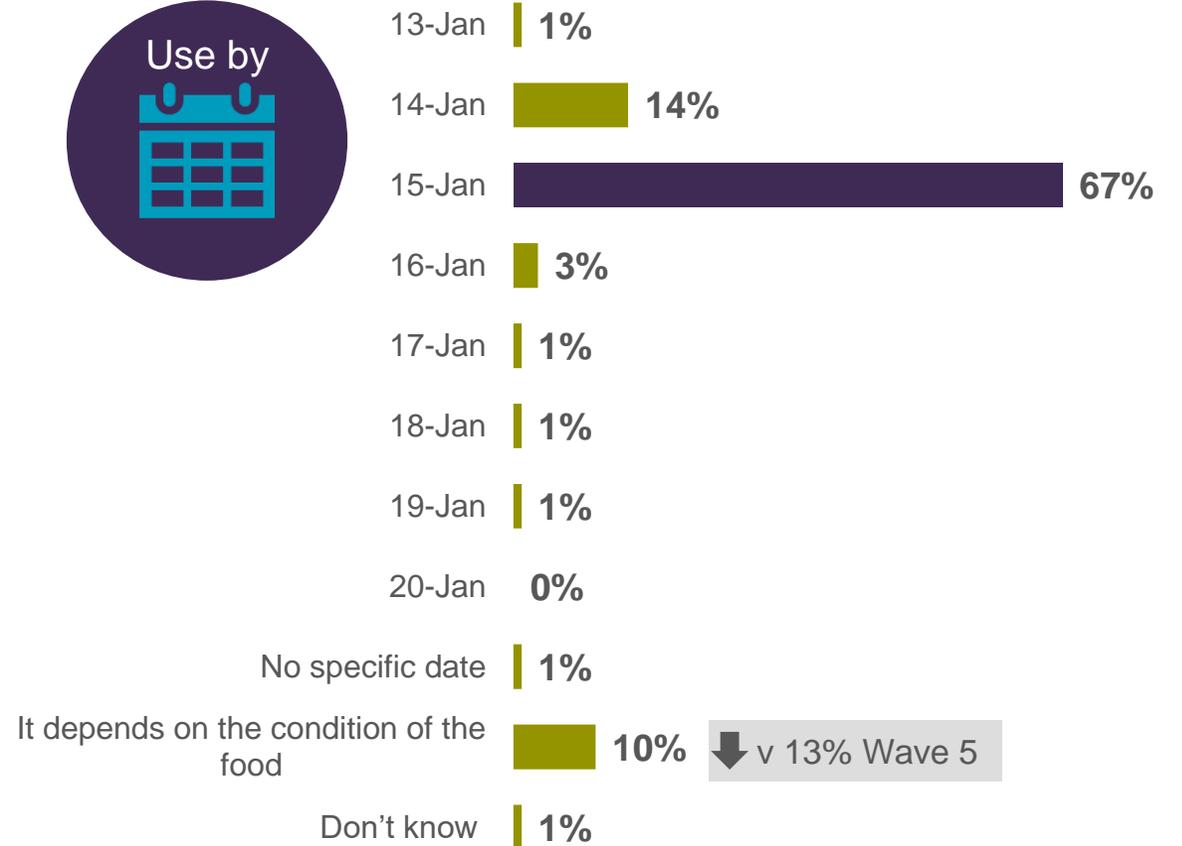
Q28 Which of these is the best indicator of whether food is safe to eat? Base:1046

**Two-thirds of consumers understand the correct ‘use-by’ date, similar to previous waves. Best before dates are less definitive, with consumers more likely to check food condition before deciding whether to eat.**

**Last date to eat food labelled ‘best before’ 15 Jan**



**Last date to eat food labelled ‘use by’ 15 Jan**



## Whilst half of Scots say they trust the information on food labels, two-fifths are worried that what's in their food might not be what's on the label.

% agree

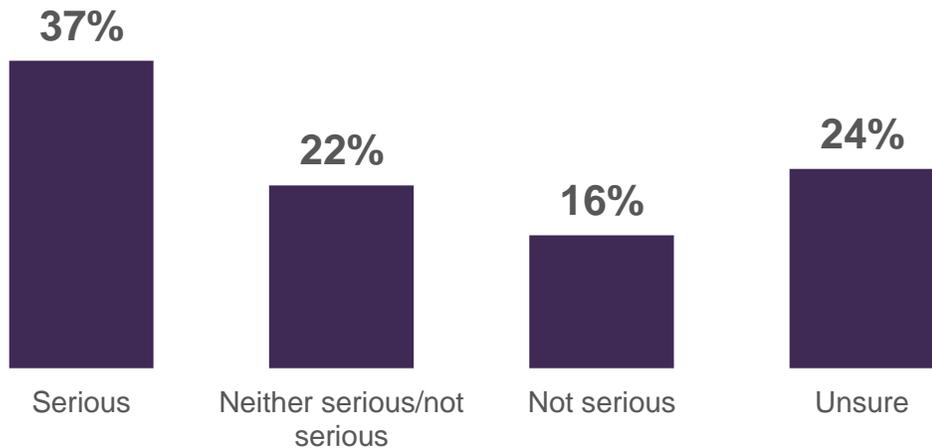


12% of respondents suspected that they had eaten/drunk something that wasn't on the label.

- This figure was highest amongst C2DEs (14%)

# Food crime was perceived as a serious problem by two fifths of Scots. FSS was cited as the first port of call for reporting food crimes, although knowledge of the Food Crime Hotline was lower.

## Perceived seriousness of food crimes in Scotland



- Those in lower socio-demographic groups (C2DE) were more likely to consider food crime to be a serious problem (42%)

## If aware of food crime



- Higher awareness of Scottish Food Crime Hotline amongst lower socio-economic groups (C2DE)

# 7. Food Establishments & Eating Out

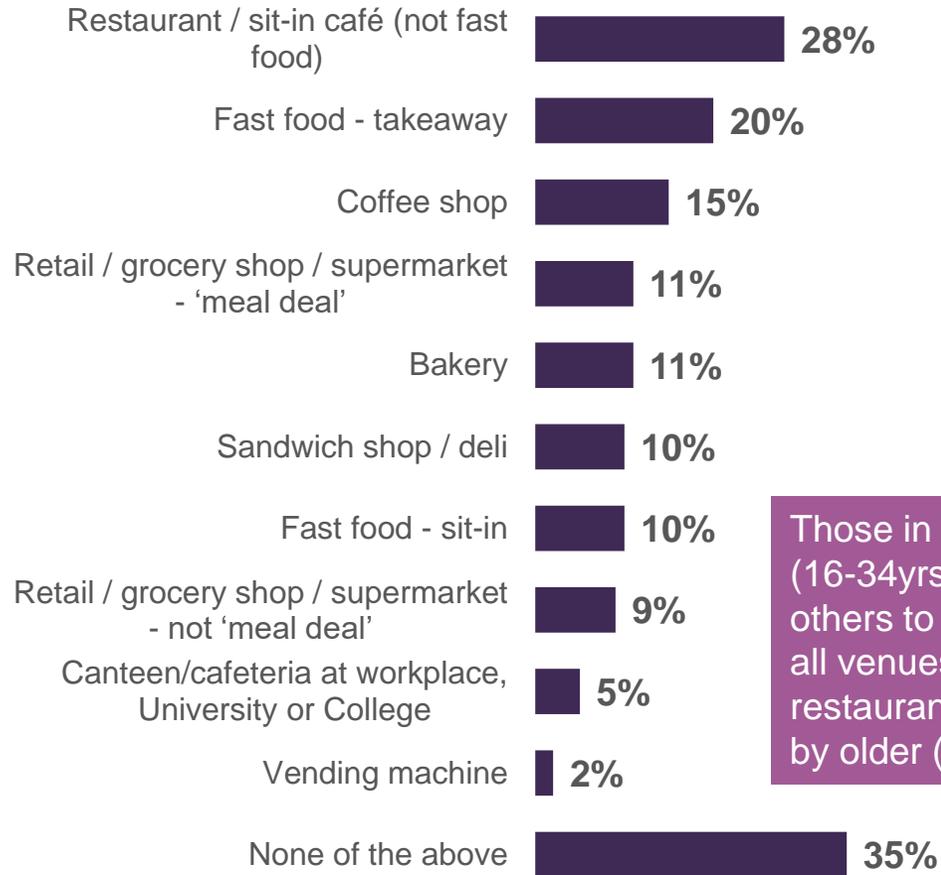


This question set is designed to measure a range of issues relating to eating out of home, including:

- Information provision
- Food hygiene certification

# 65% had eaten out of home in the previous week, mostly in restaurants and fast food takeaways. Around half feel the food they eat out of home is less healthy than food eaten at home.

## Eaten Out of Home in Past Week



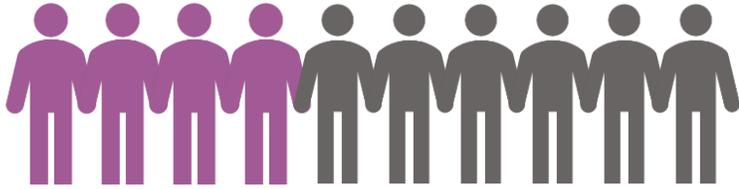
Those in the youngest age group (16-34yrs) were more likely than others to have eaten meals from all venues, except sit-in restaurants which were favoured by older (65+yrs and AB groups)

## Healthiness of Food Eaten Out of Home



Females and youngest age groups were most likely to admit to eating a lot less healthily out of home.

**Just over two-fifths of consumers felt they had clear information on how to check whether food they are eating out of home is safe.**



**43%** felt they had clear information on how to check whether the food they are eating out of home is safe

↑ v 38% Wave 5

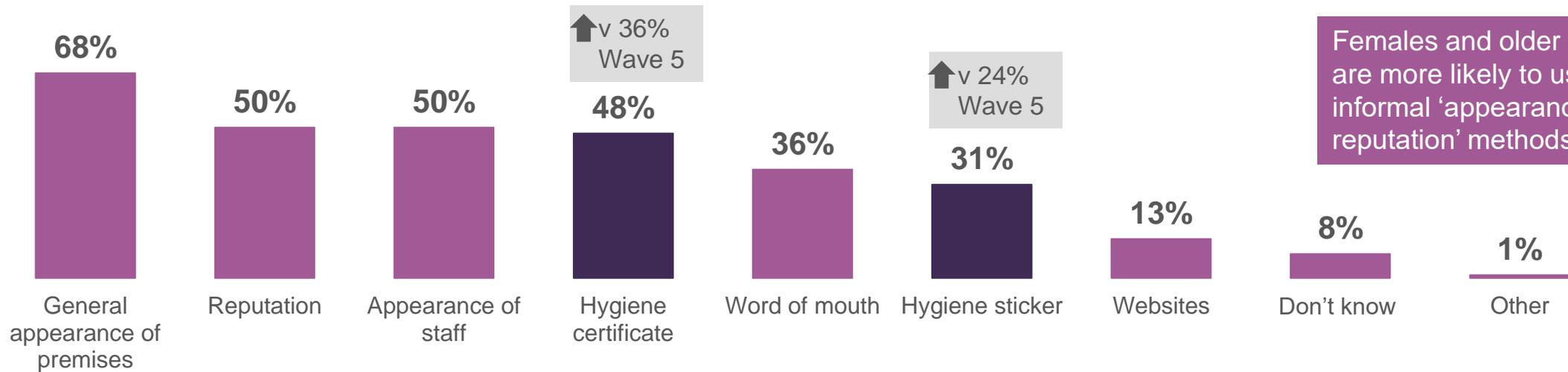


**35%** agree that 'restaurants bars and cafés usually provide enough information to allow me to check that the food I am eating is safe'

**Almost three-quarters of consumers think out of home establishments should pay more attention to food safety and hygiene. Whilst consumers still tend to judge hygiene standards using informal methods, there has been a significant increase in those using hygiene certificates and stickers.**

**73% agree that 'restaurants cafés, takeaways and catering establishments should pay more attention to food safety and hygiene'**

### How Hygiene Standards are Judged

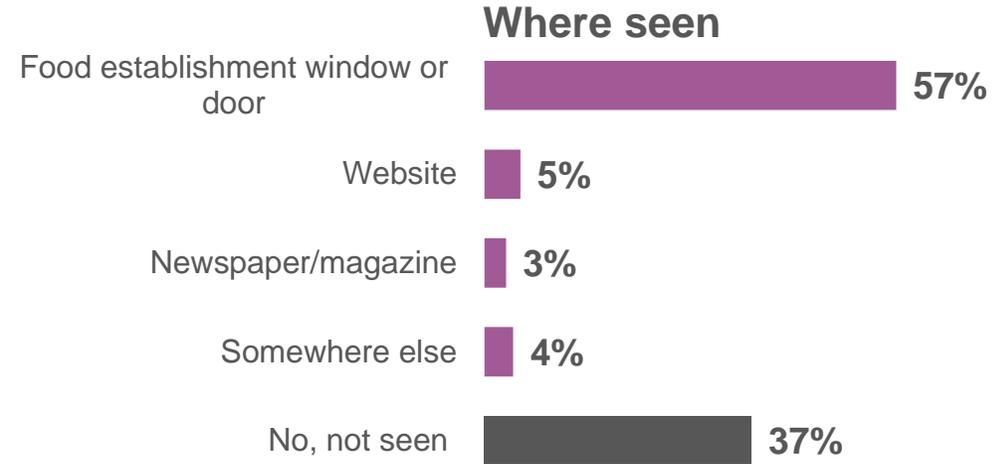


Females and older age groups are more likely to use the more informal 'appearance and reputation' methods.

**Three-fifths recognised FHIS logo / certificate and a quarter said they had used this in the past year, mostly displayed on window/door of food establishments. FHIS was very influential in the decision of whether to use an establishment or not.**



63% have seen FHIS logo or Certificate before



25% have used FHIS in the last 12 months

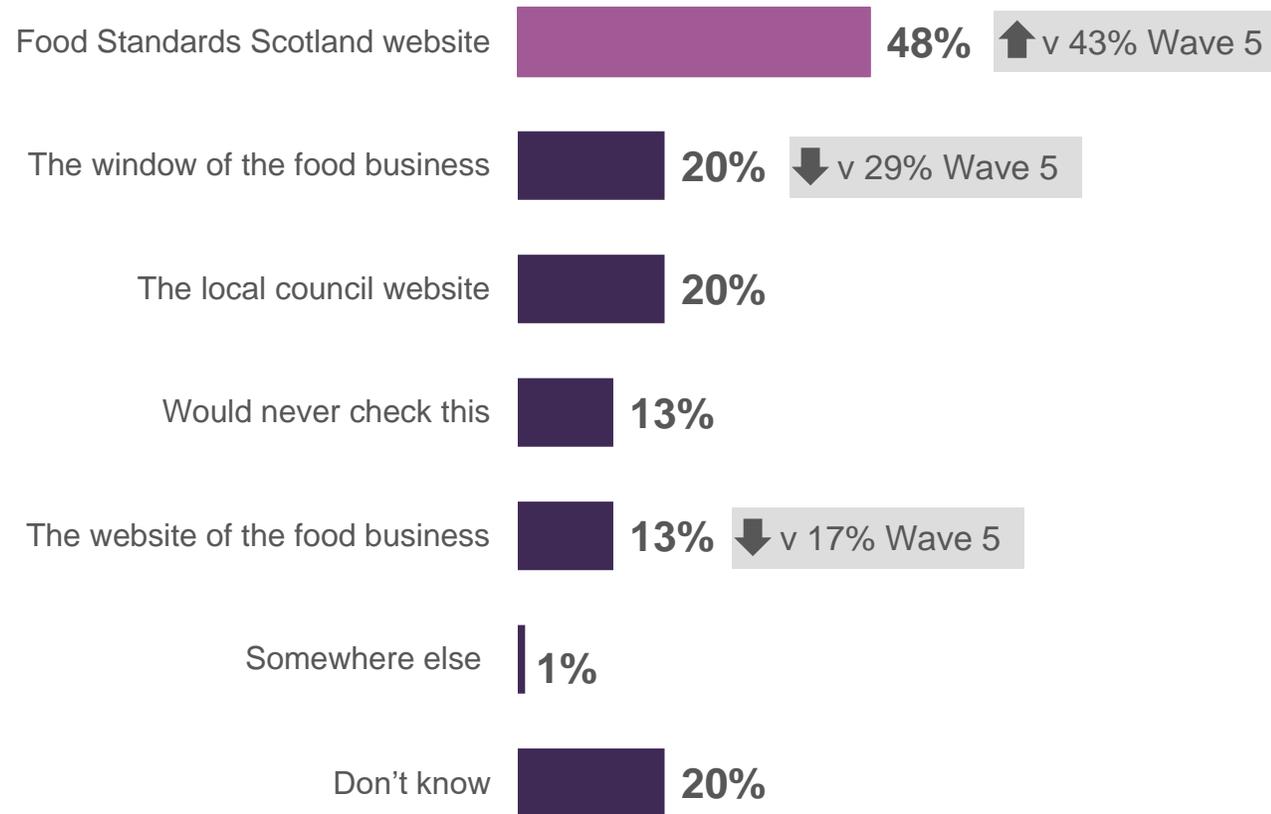


86% of those who used FHIS said it had an influence on whether to use the establishment

↓ v 31% Wave 5

# Almost half would go to FSS website if they wanted to check a business' hygiene inspection performance, a significant uplift since Wave 5.

## Source of food hygiene inspection info



# 8. Allergens & Healthy Eating

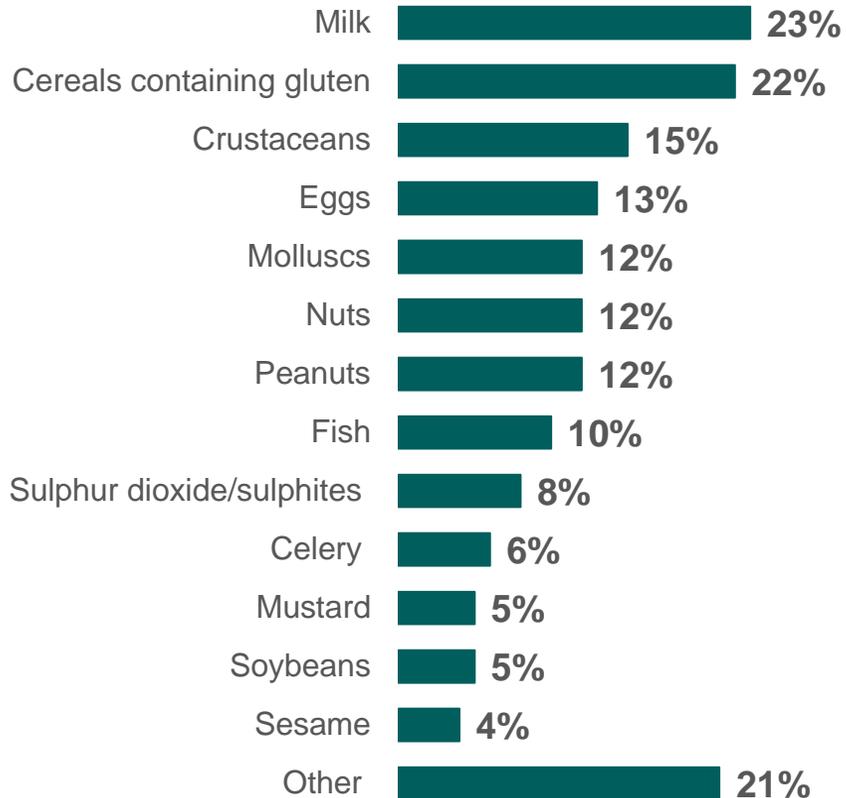


This question set includes a series of measures relating to allergens including:

- understanding the incidence of specific allergens within households
- gauging whether information provided on food labels and by out of home establishments is sufficiently clear regarding allergens.

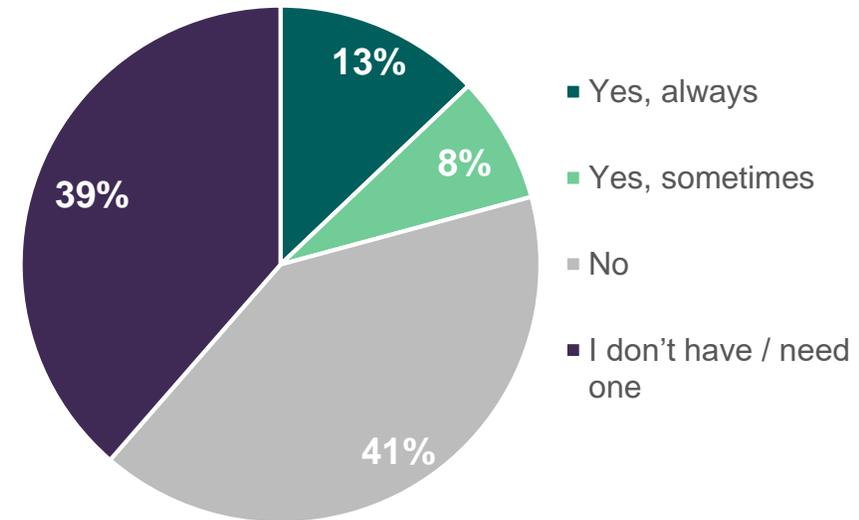
**15% of households have at least one person with food allergies, with allergies to milk and gluten being most prevalent. Although 6 in 10 people with allergies need an EpiPen/auto-injector, just 13% always carry one when eating out.**

### Allergies in Household



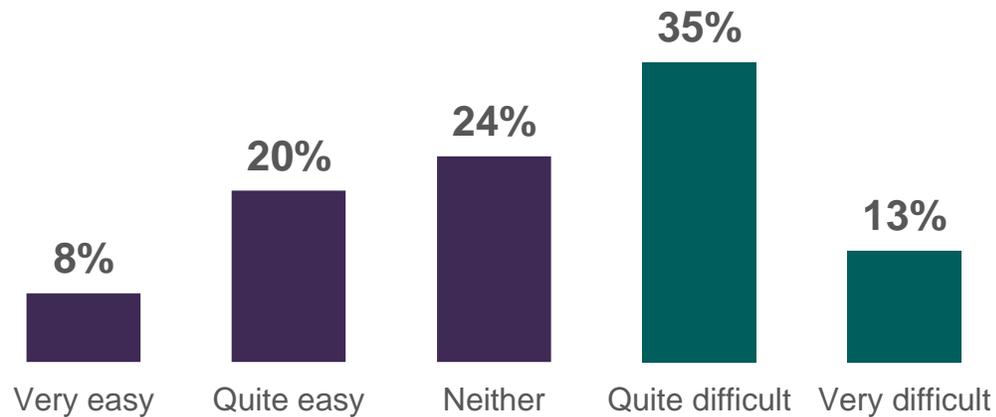
**10% have other people in the house with allergies & most (98%) buy food for that person**

### Carry EpiPen

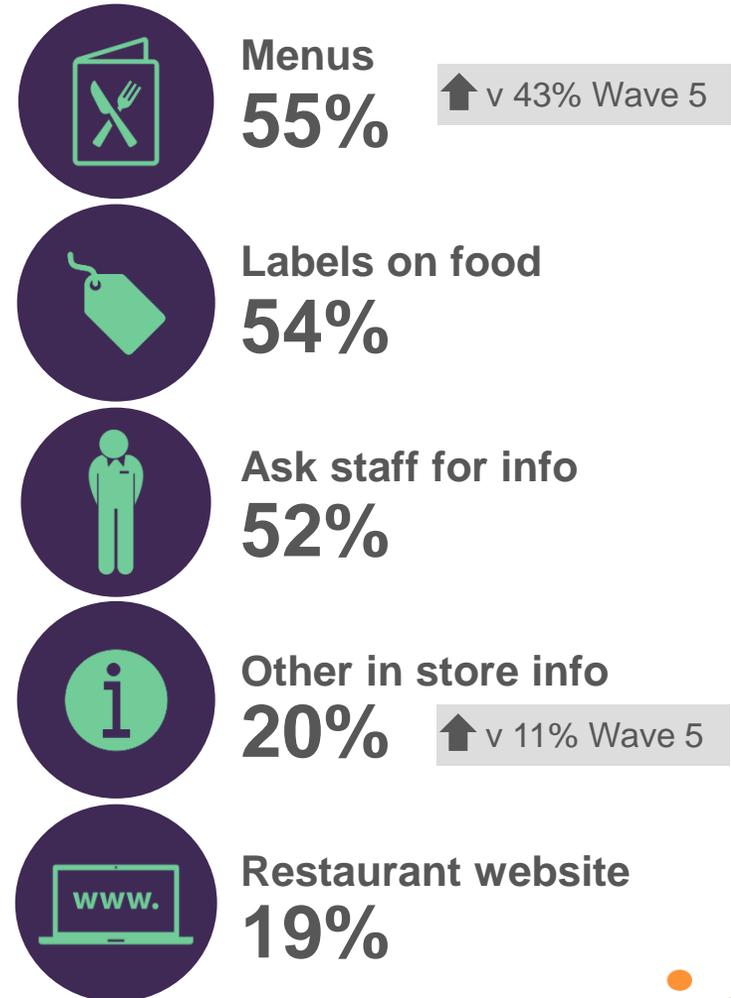


**Almost half of those with allergies think it's difficult to find allergy information when eating out of home. The main sources of allergy information are, increasingly, menus. Food labels and asking staff are also important.**

### Ease of Finding Allergy Info Out of Home



### Main Sources of Allergy Info Out of Home



**Few believe that there is currently enough information provided about allergens in food when eating out, and there is strong support for universal provision of allergen information. Over half believe calorie information should be displayed out of home.**



There is enough information provided about allergens in foods when eating out



All restaurants, cafés and takeaways should display allergens on their menus / products

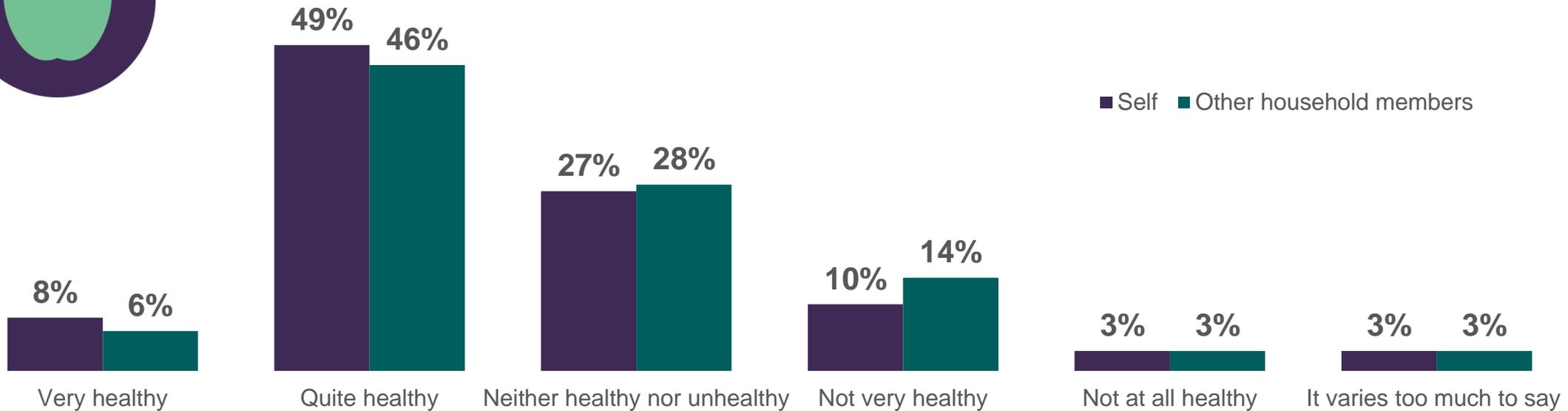


All restaurants, cafes and takeaways should display calories on their menus / products



■ I definitely agree ■ I tend to agree ■ I neither agree nor disagree ■ I tend to disagree ■ I definitely disagree ■ Don't know

**Consumers were more likely to rate their own diet as healthy (57%) compared with others in their households (52%). Almost 1 in 5 of those in lower socio-economic groups thought their diet was unhealthy.**



- Males and those in the highest socio-economic groups were more likely to say their own diet was **very** healthy (10% and 14% respectively)
- Whilst almost 1 in 5 (18%) of those in the lowest groups felt the foods they ate were not very / not at all healthy.



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## Appendix: Detailed Methodology

- The research methodology was designed to be consistent with previous waves to ensure comparability in terms of:
  - Data collection method and sampling approach
    - Online self-completion; sample drawn from multiple panel partners
  - Fieldwork dates
    - 7th-20th December 2018
  - Questionnaire design and length
    - Module approach; 30 minutes.
- The final sample size at Wave 7 was 1,046.
  - Base sizes at previous waves : Wave 1 (1003); Wave 2 (1000); Wave 3 (1000); Wave 4 (1000); Wave 5 (1000); Wave 6 (1002).
- Weighting was applied to ensure the final dataset was representative of the Scottish adult population.
- Statistical testing was undertaken to identify significant differences between the latest dataset and that from previous waves, at the 95% confidence limit (research industry standard).
  - Where statistically significant differences exist, these are highlighted using red and green arrows.
- All research was undertaken in strict accordance with MRS Code of Conduct and GDPR legislation