Food in Scotland Consumer Tracking Survey Wave 12

Summary Report

1. Introduction

- The Food in Scotland Consumer Tracking Survey monitors attitudes, knowledge and reported behaviours relating to food amongst a representative sample of Scotland's population, identifying changes over time.
- Established by Food Standards Scotland (FSS) in 2015, the survey is undertaken bi-annually.
- The questionnaire was designed around FSS' six strategic priorities 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 12 (diet & nutrition).
- Statistically significant differences (at 95% confidence level) compared with the previous relevant wave are highlighted with ⬆⬇

2. Methodology

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

Online survey

Representative sample of **1,009** Scottish adults

30mins questionnaire length

6th – 14th July 2021

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

3. Key Findings

Knowledge, Awareness & Visibility

- Most adults in Scotland have heard of Food Standards Scotland
- However opportunity still exists to further understanding of the organisation's remit
- Food safety remains the most closely associated aspect of FSS' remit
- Levels of trust in FSS are high and the organisation is rated highly across all corporate reputation measures
- In line with FSS' key priorities, consumer concerns regarding the food environment focus on pricing, authenticity and standards, as well as animal welfare and the use of chemicals in food production
- Some interesting long term trends show concern over food safety out of home in decline, while concern over food supply and shortages and the environmental impact of food production have significantly increased
- Sustainability is a key concern and consumers are acting to reduce the environmental impact of their own food consumption
- There is space for FSS to get involved in driving this further.

Healthy Eating

- Attitudinally, consumers recognise there are issues with unhealthy diets in Scotland, and understand the related health risks
- Most feel confident they know what constitutes a healthy balanced diet, and do demonstrate a reasonable understanding of the key elements
- However, this knowledge does not necessarily translate into consistently positive behaviours
- Cost and time remain key perceived barriers to healthy eating as does the feelgood factor from eating unhealthy snacks and treats
- Many admit they could or should do more to eat healthily, but motivation to put this into practice is uncertain
- Takeaway / delivery foods are a particular area for unhealthy eating, and a range of interventions such as greater availability of healthy options, lower pricing and visibility of calorie counts are required to help consumers make healthier choices in this setting
- Inequalities are evident in attitudes and behaviours towards healthy eating.

Covid-19

- The impacts of Covid-19 are still being seen, although day-to-day habits appear to be returning to usual
- Shopping and cooking habits have largely settled with similar patterns month on month
- Positive shifts in behaviour are seen regarding diet and physical activity, suggesting a move away from some of the habits formed during the pandemic
- However those in the younger age groups and lower socio-economic groups remain most likely to be snacking more and eating out of boredom
- The link between obesity and the severity of coronavirus appears increasingly well known
- Just under a quarter said they had worried about affording food over the past year, and 14% had to skip meals as a result

Vitamin D

- Half were aware of the recommendation to take a vitamin D supplement
- And almost two-fifths had seen advertising about taking a vitamin D supplement
- A third said they take vitamin D every day in winter, and another 16% take it at least once a week, leaving significant room for improving uptake
- While there are other barriers to taking a daily supplement such as forgetting and preferring to get vitamins from food, one of the main reasons is lack of awareness/knowledge of the recommendation
- After being informed of the benefits, two-thirds said they were likely to consider taking a daily vitamin D supplement in winter, suggesting that continued activity to raise awareness of the recommendation would be useful.

Allergens

- Data on allergens remains very consistent with that from previous waves
- Just over one in ten households in Scotland contain someone with a food allergy
- Attitudes amongst the general public towards those with allergies remain broadly supportive
- Although more concerned about allergens than the general population, those with food allergies feel they have clear information about ingredients that can cause allergic reactions
- However, it remains easier for consumers to find information about allergens when shopping – where food labels are the key source – than when eating out of home, where they rely more on staff and menus
- Most are comfortable disclosing their food allergy when eating out of home, particularly children, although could be further encouraged to mention allergies when purchasing food to go
- Half are signed up to the allergen alert system, suggesting further promotion of this service would be useful to reach a broader audience

4. Awareness, Knowledge & Visibility of FSS

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

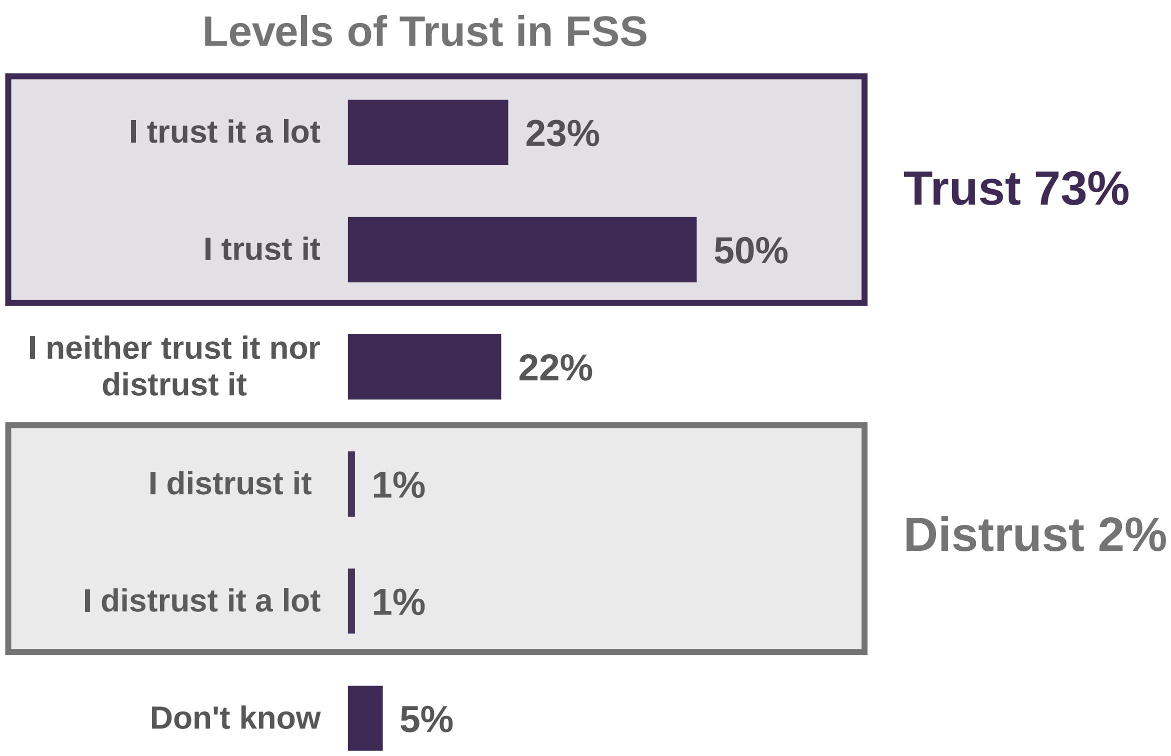
→ FSS is trusted and influential

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

Around 8 in 10 adults in Scotland have heard of FSS and almost three quarters of them trust the organisation to do its job, consistent with previous years.

79% have heard of FSS

- Awareness levels higher for those with a food allergy in the household (86%) but otherwise consistent across the sample

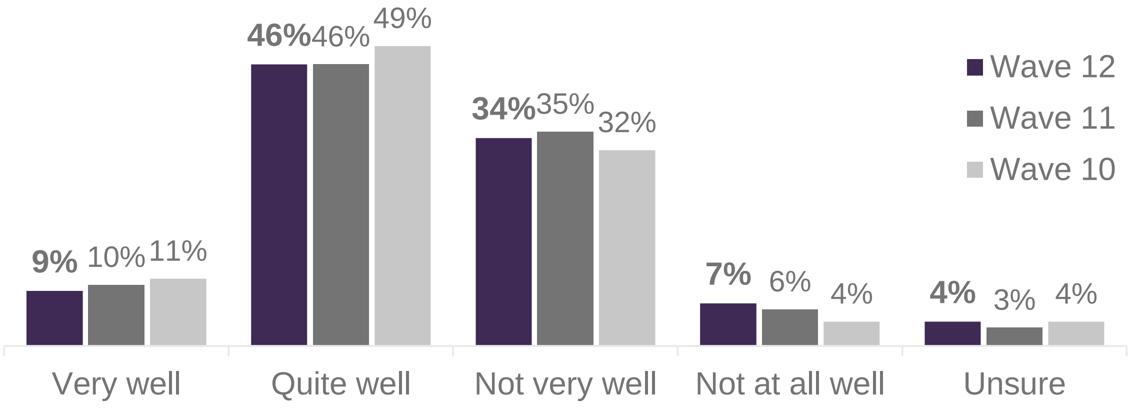


- Levels of trust were higher amongst those with kids (78%) but otherwise consistent across the sample

Q7 Have you heard of Food Standards Scotland? Base: All respondents W12 1009
Q10 How much do you trust or distrust Food Standards Scotland to do its job? Base: Those aware of FSS W12 796

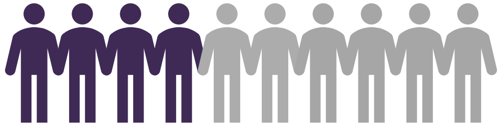
More than half of those aware of FSS feel they understand the organisation's role / remit, equating to 44% of the whole adult population.

Understand FSS role/remit
(those aware of FSS)

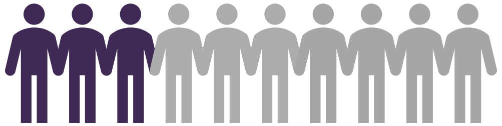


- The following demographic groups were more likely to feel they understand FSS' remit well:
  - Those with kids (71%); 16-34yr olds (67%); those with food allergies in h/h (65%); females (59%);
- Males (45%) and over 65yr olds (55%) were more likely to **not** understand FSS' remit

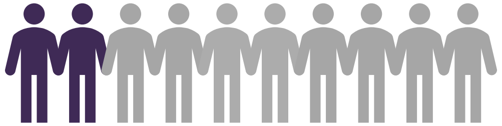
Amongst Scottish Public



Understand FSS' remit 44%



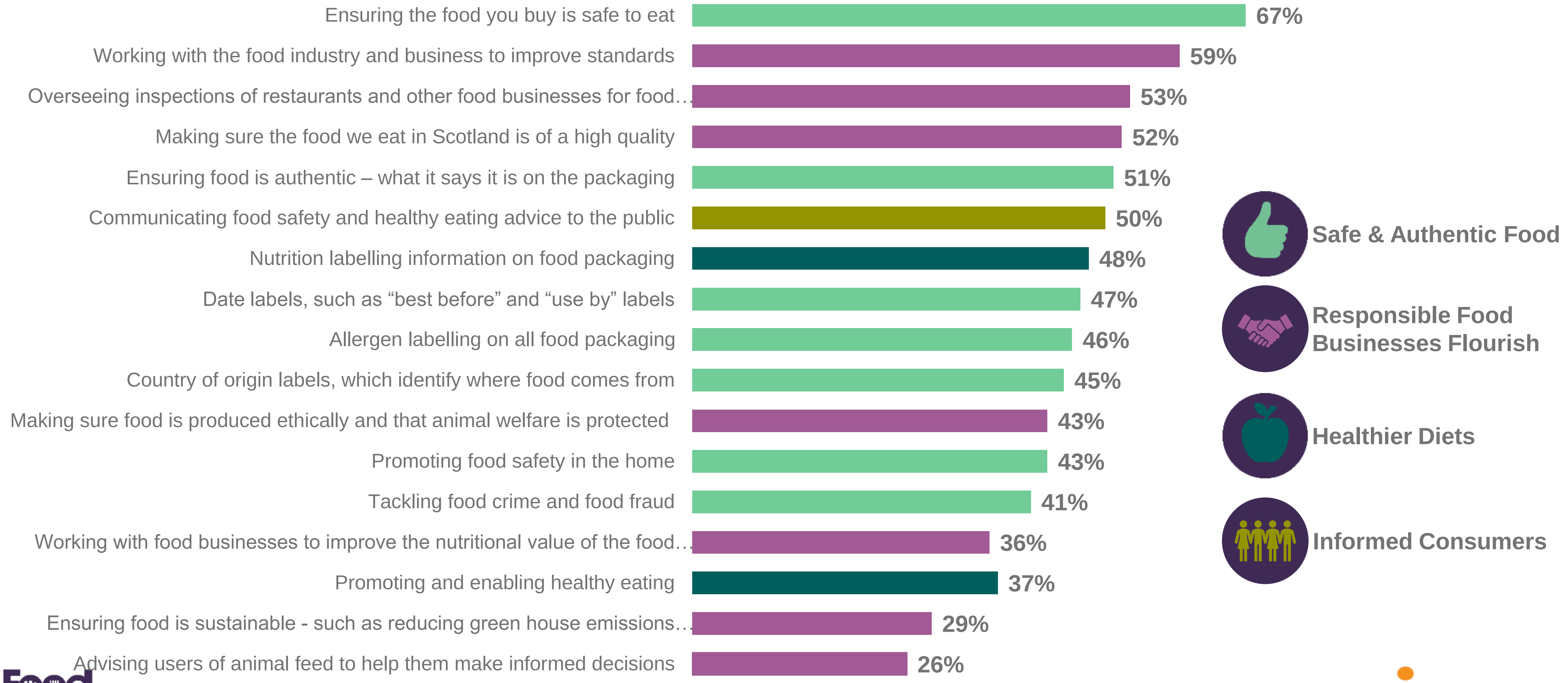
Do not understand remit 32%



Unaware of FSS 21%

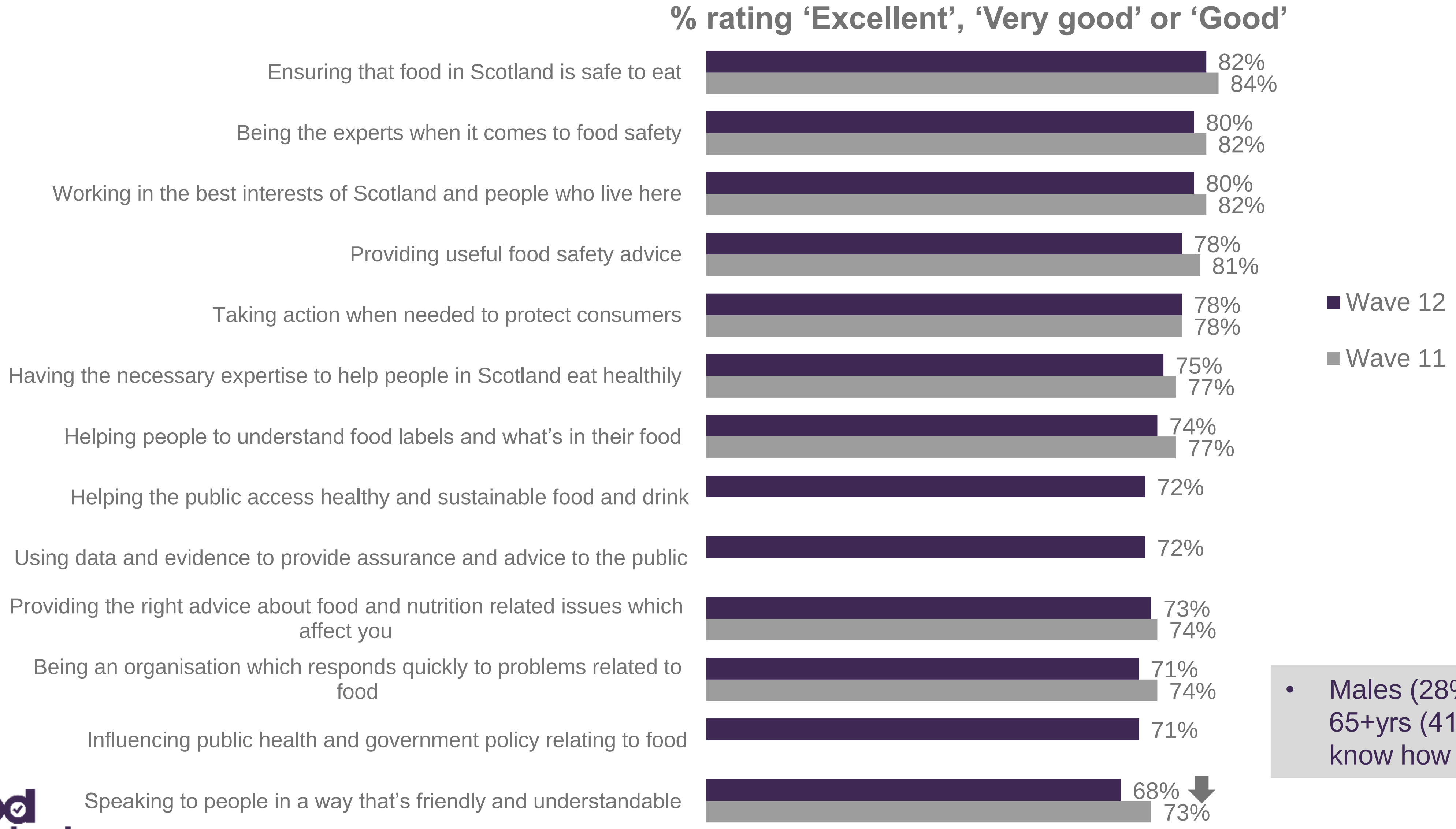
Q8 How well do you feel you understand Food Standards Scotland's role/remit? Base: Those aware of FSS W12 796

FSS' role in ensuring food is safe for consumers to eat is the best known element of the organisation's remit. Work with the food industry to improve and maintain quality standards is also recognised by many, albeit at a slightly lower level this year.



Q9 Which of these issues do you think Food Standards Scotland is responsible for? Base: Those aware of FSS W12 796

Consistent with previous years, consumers rate FSS highly on all key measures. Aspects relating to food safety are particularly highly rated, in line with this being the most well known of FSS' responsibilities. Ratings on tone of voice have declined slightly from Wave 11.

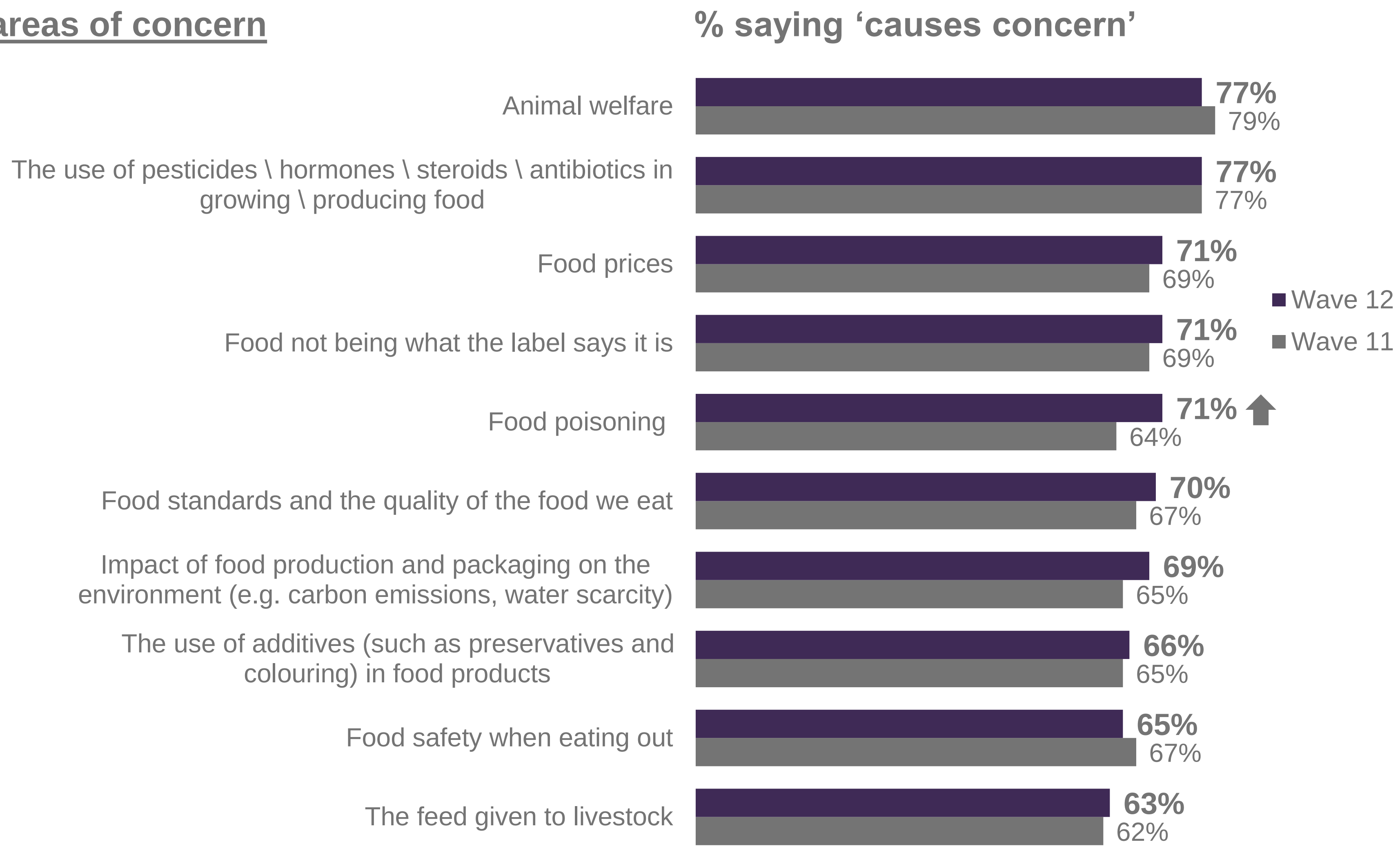


- Males (28%) and those aged 65+yrs (41%) said they didn't know how FSS speaks to people

Q11 How do you rate Food Standards Scotland in terms of…? Base: Those aware of FSS W11 827, W12 796

Animal welfare and the use of chemicals in food production remain key consumer concerns. Food prices, authenticity and standards are also of particular concern. Most data is consistent with Wave 11 but concern about food poisoning has increased.

Top 10 areas of concern



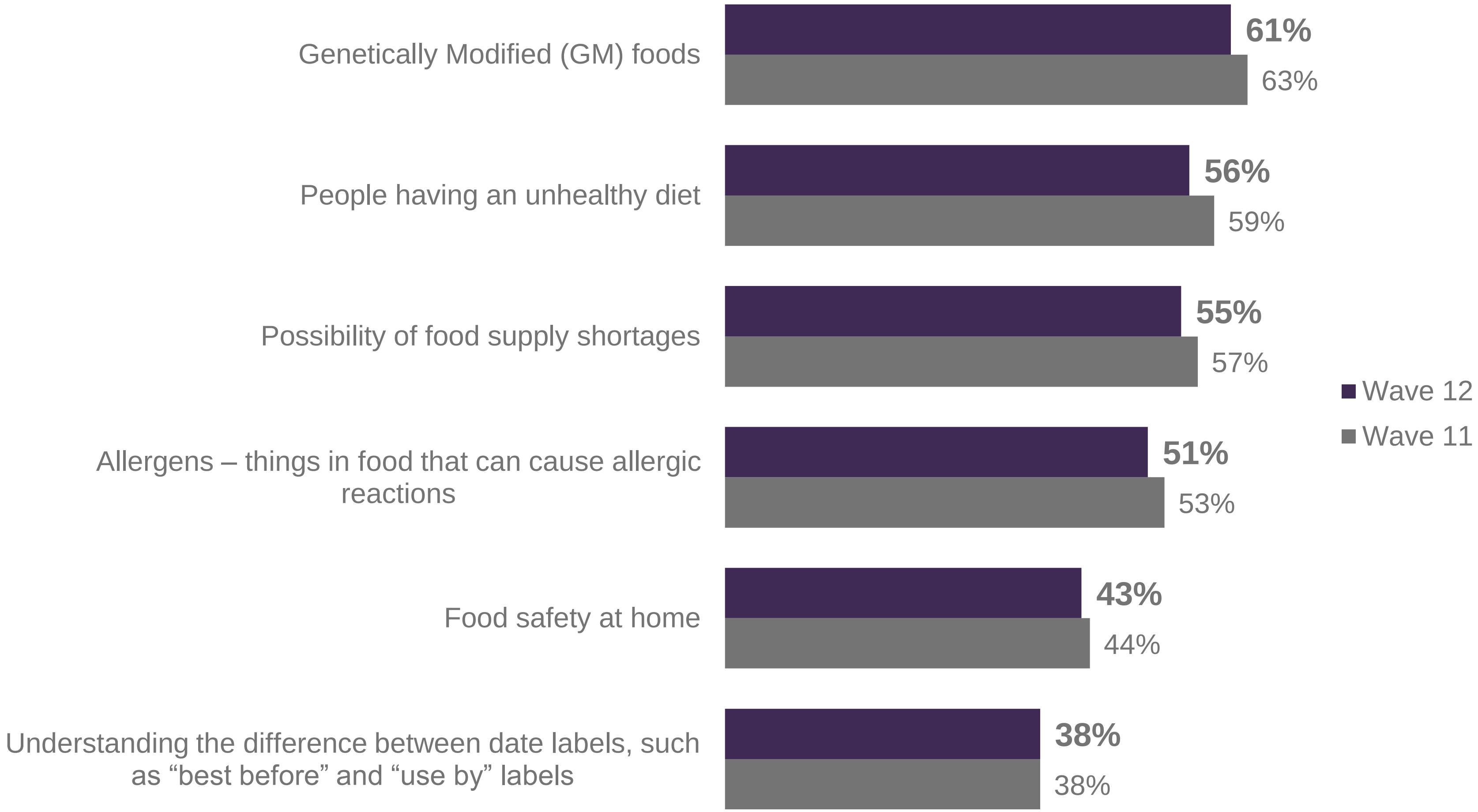
- Women are more likely to be concerned about most of these issues than men
- Those with kids are more concerned than others about food poisoning
- DE socio-economic group are more concerned than others about food prices
- Over 65 year olds are more concerned about food additives and the use of pesticides

Q12 Please sort each of these issues according to whether or not they cause you concern or do not cause you concern.
Base: All respondents W11 1016, W12 1009

Levels of concern over other food related issues remain similar to previous waves, with understanding date labels and food safety at home of relatively less concern to consumers.

Other areas of concern

% saying ‘causes concern’



- AB socio-economic group are more concerned about unhealthy diets than others
- Those with kids are more concerned than others about understanding date labels, food safety at home and the possibility of food shortages
- 16-34yr olds are more likely to be concerned about food safety at home and understanding date labels than other age groups

Food Standards Scotland

Q12 Please sort each of these issues according to whether or not they cause you concern or do not cause you concern.
Base: All respondents W11 1016, W12 1009

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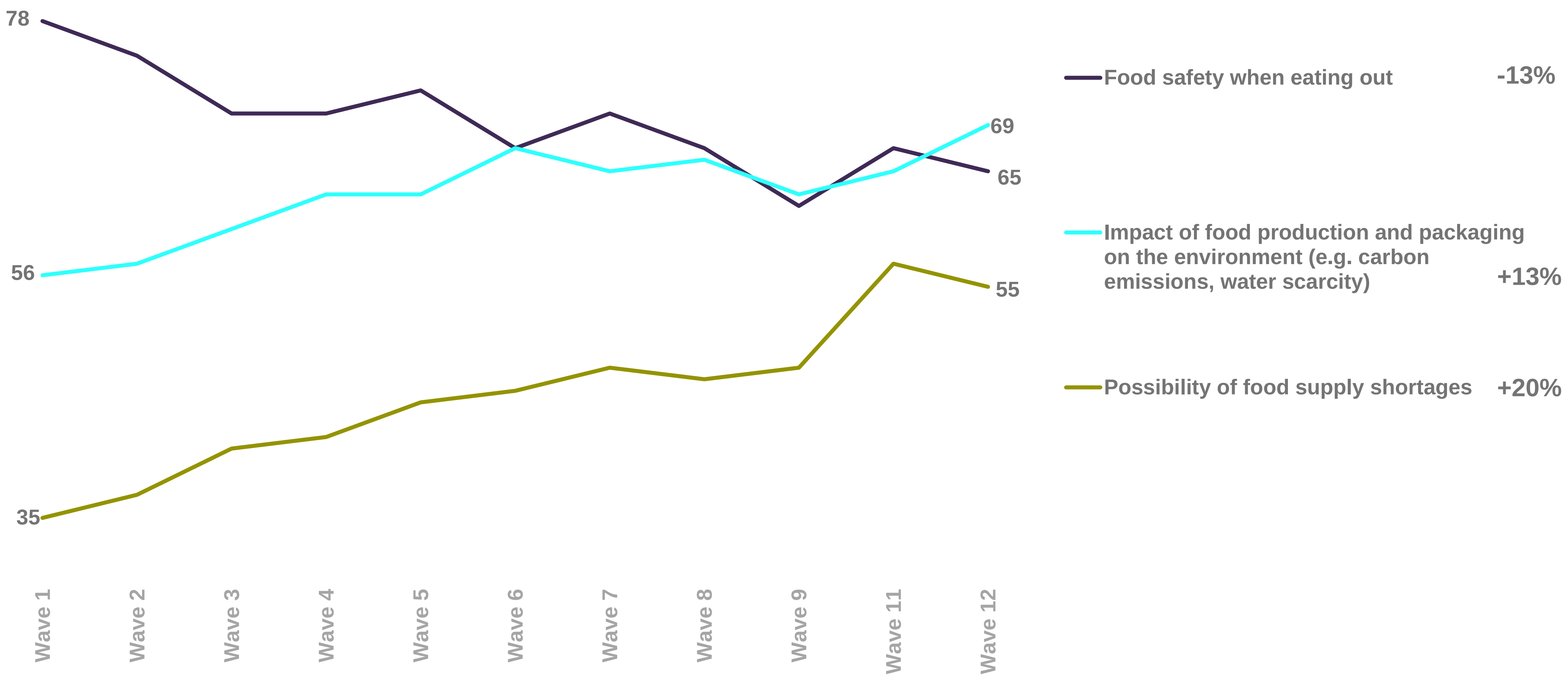
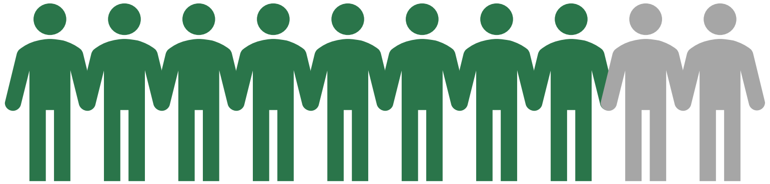
Top issues of concern to consumers have changed over time.



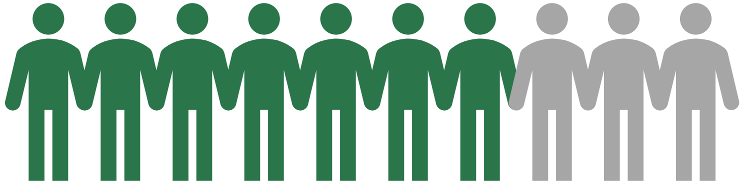
Q12 Please sort each of these issues according to whether or not they cause you concern or do not cause you concern. Base: All respondents W12 1009

Previous base sizes:
W1 (1003); W2 (1000); W3 (1000); W4 (1000); W5 (1000); W6 (1002); W7 (1046); W8 (1069), W9 (1079), W10 (1015), W11 (1016)

Sustainability within the food environment is clearly an important consideration for consumers. Few currently recognise this as being part of FSS' remit.

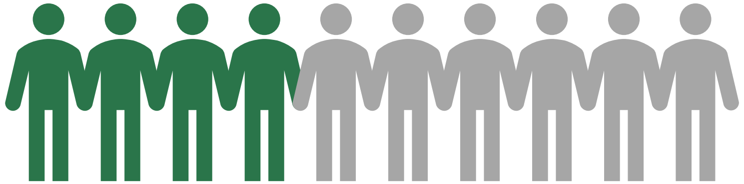


78% consider it important that their food is produced in a sustainable and environmentally friendly way

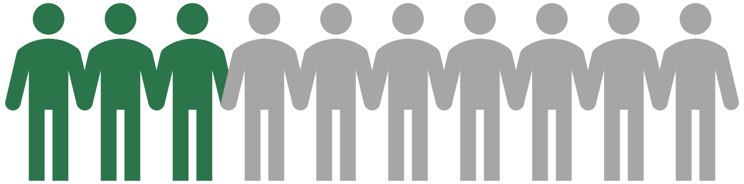


69% are concerned about the impact of food production and packaging on the environment

*up from 56% in Wave 1



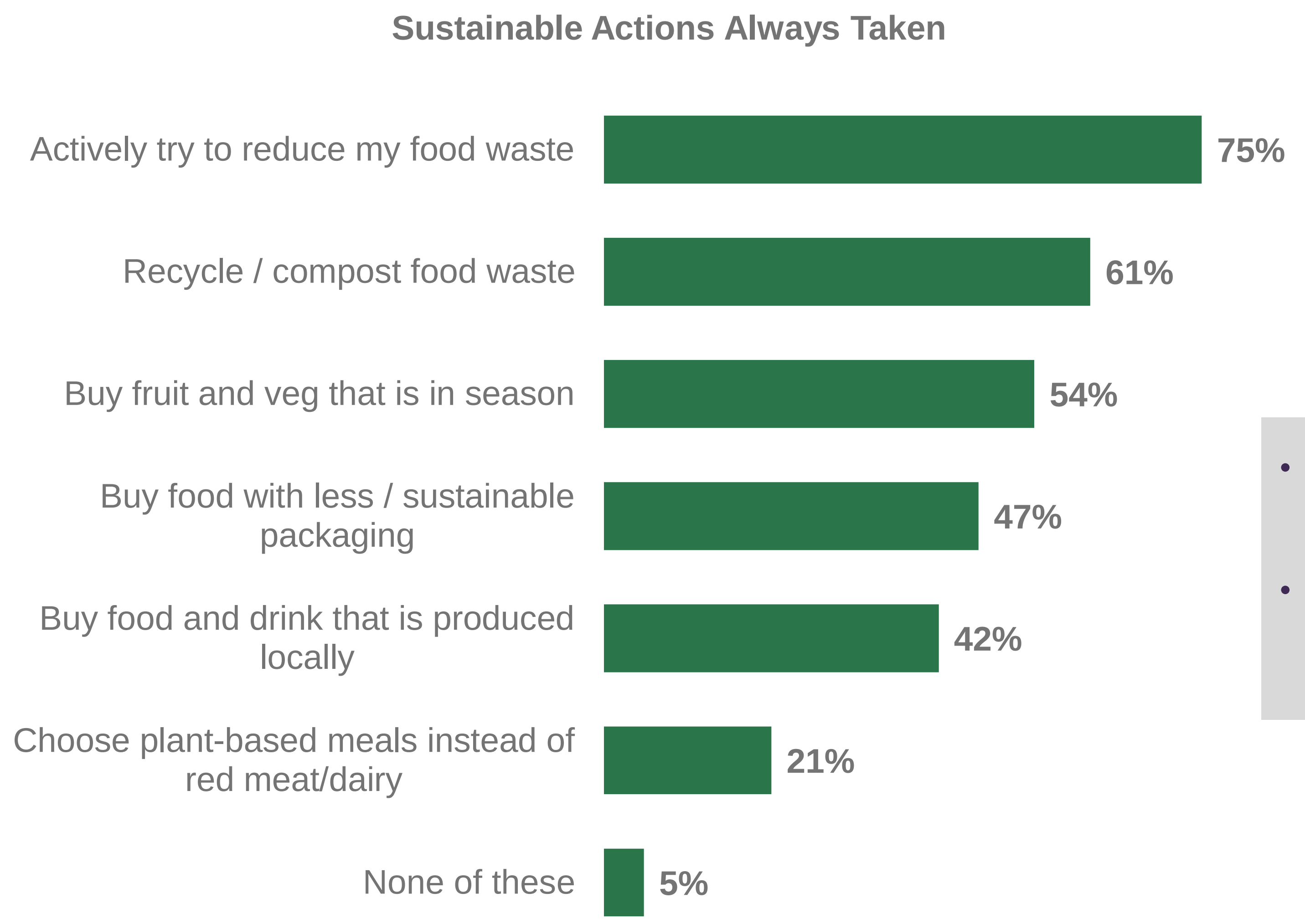
42% feel they can access clear information to know if food has been produced in a sustainable way



29% recognise sustainability to be part of FSS' remit

Q12 Please sort each of these issues according to whether or not they cause you concern or do not cause you concern. Base: All respondents W12 1009
Q15 How important is it to you that the food you eat is produced in a sustainable and environmentally friendly way? Base: W12 1009
Q14 Do you have clear information on...? Base: All respondents W12 1009
Q9 Which of these issues do you think Food Standards Scotland is responsible for? Base: Those aware of FSS W12 796

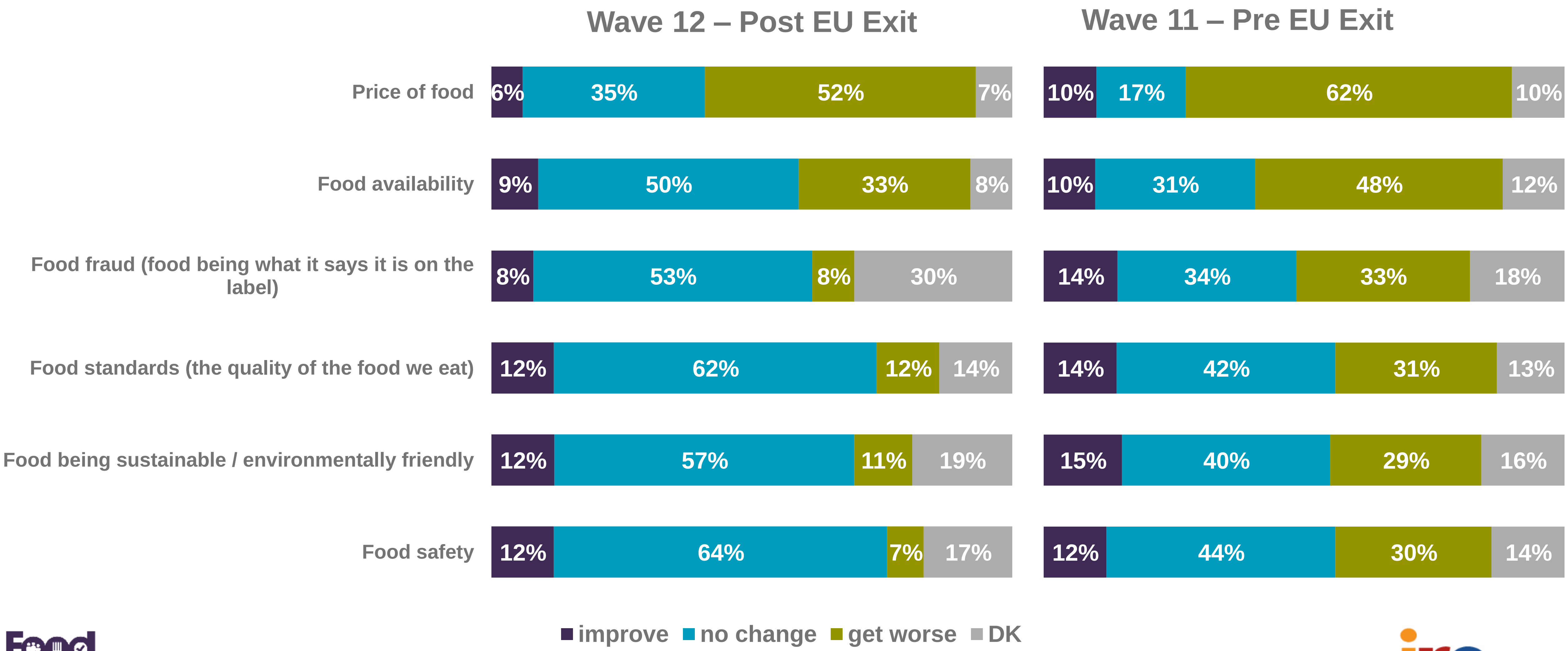
Almost all consumers are taking steps to reduce the environmental impact of their food consumption. Reducing or recycling food waste is the most common.



- Over 65yr olds are more likely than others to actively reduce or recycle food waste
  - 88% reduce; 75% recycle
- Women are more likely to buy seasonal fruit / veg (58%) and choose plant based meals (24%)

Q16 Which, if any, of the following do you always do? Base: W12 1009

With UK having exited the EU, impacts experienced so far have been much less negative than anticipated. Most have seen no change across the various measures, other than pricing and availability which some have seen get worse.



Q13 What impact, if any, have you experienced on the following food issues as a result of Brexit – the UK leaving the EU? Base: All respondents W12 1009, W11 1016
W11 wording: What impact, if any, do you think there might be on the following food issues as a result of Brexit – the UK voting to leave the EU?

5. Healthy Eating – Attitudes, Knowledge & Behaviour

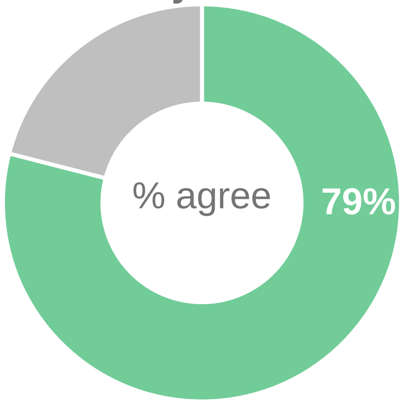
This question set is designed to deliver insight and track changes for the following strategic outcomes:

→ Consumers Have Healthier Diets
→ Consumers are empowered to make positive choices about food

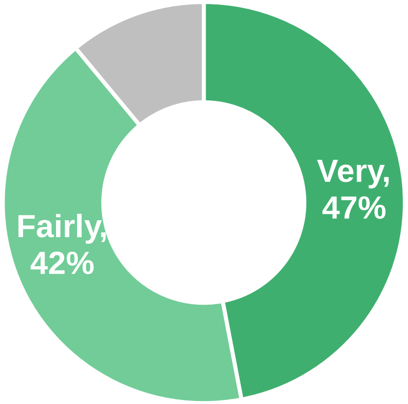
This section focuses on consumer attitudes, knowledge and current behaviour with regards to healthy eating.

The majority of adults in Scotland continue to recognise there is an issue with unhealthy eating and obesity that needs to be addressed. The health risks of unhealthy diets are also widely acknowledged.

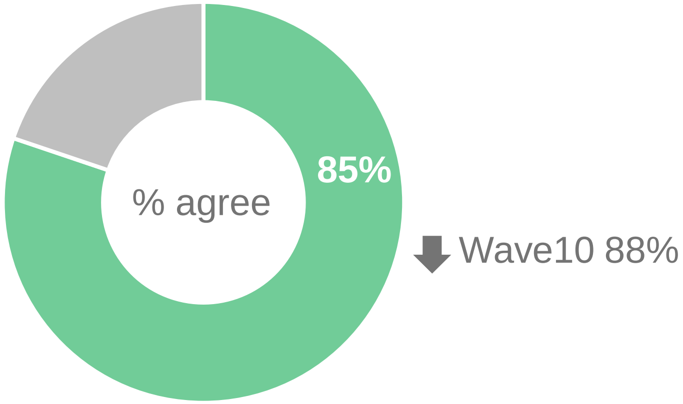
There are too many people who eat unhealthily in Scotland



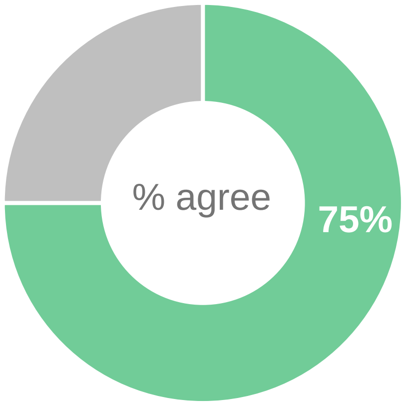
How serious a problem is obesity in Scotland



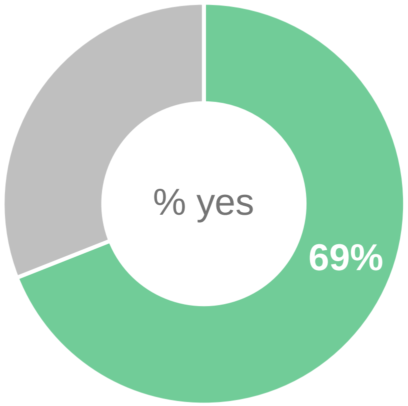
I know that an unhealthy diet can cause lots of health problems, like cancer and heart disease



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

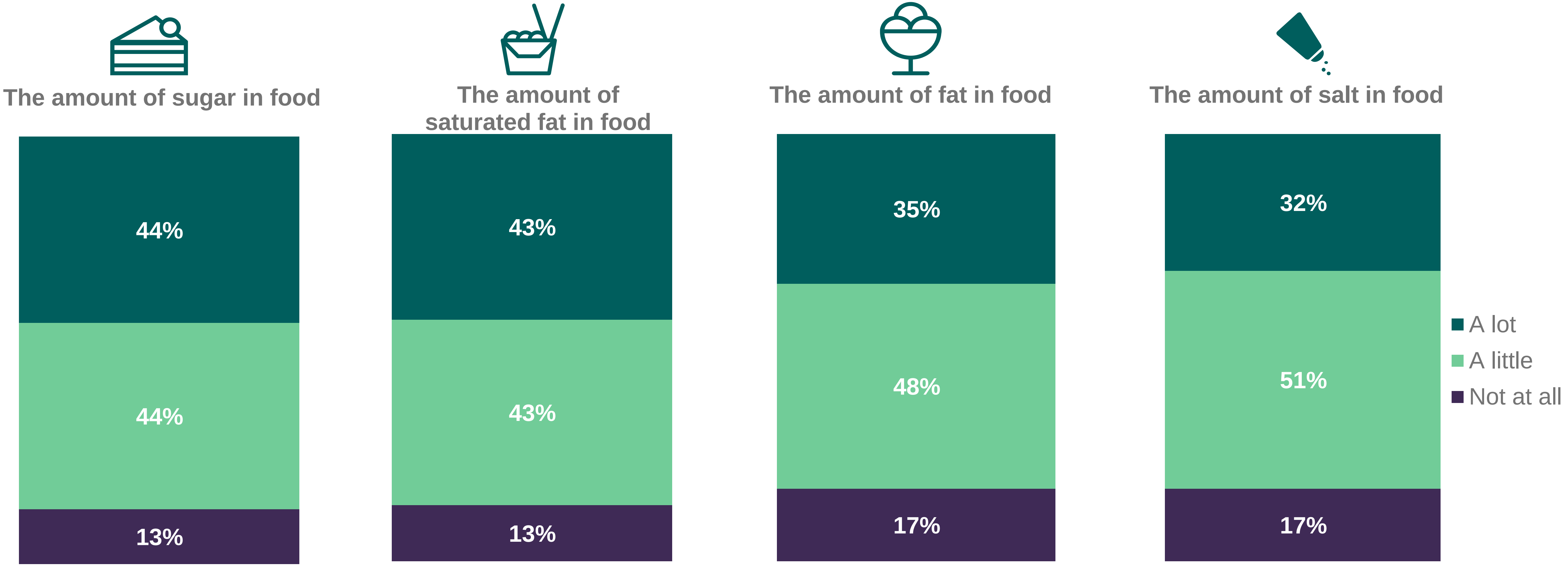


Believe there is a link between obesity & cancer



Q20 How much do you agree or disagree with each of these statements? Base: W12 1009
Q31 How serious a problem do you think obesity is in Scotland today? Base: W12 1009
Q32 Do you believe there is a definite link between obesity and the likelihood of getting some types of cancer? Base: W12 1009

Consumers are concerned about the nutritional content of their food, particularly the amount of sugar and saturated fat. Females and those in older age groups are more concerned than others.



Concerned 'a lot'
- 65+yrs (54%)

Concerned 'a lot'
- 65+yrs (53%)
- Females (47%)

Concerned 'a lot'
- Females (38%)

Concerned 'a lot'
- Kids at home (38%)

Food Standards Scotland

Q19 Please indicate how much each of these concerns you? Base: W12 1009

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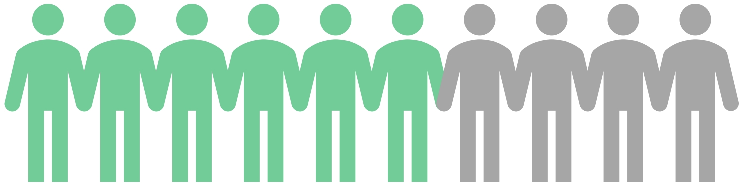
Consistent with previous years, 6 in 10 adults feel the foods they eat are healthy. A similar number of parents consider their children's foods to be healthy. Data shows a clear difference based on socio-economic group.



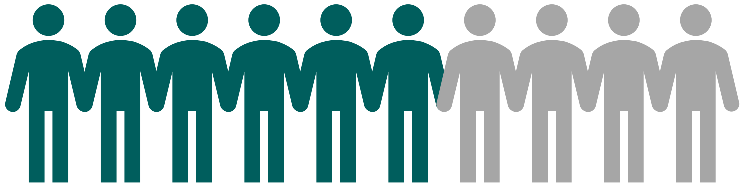
61% say the kind of foods they eat are very / quite healthy

Demographic groups most likely to say 'very healthy':

- ABs (19%); 16-34yr olds (16%); those with kids at home (17%); those with allergies in h/h (25%)

Significant difference by SEG:

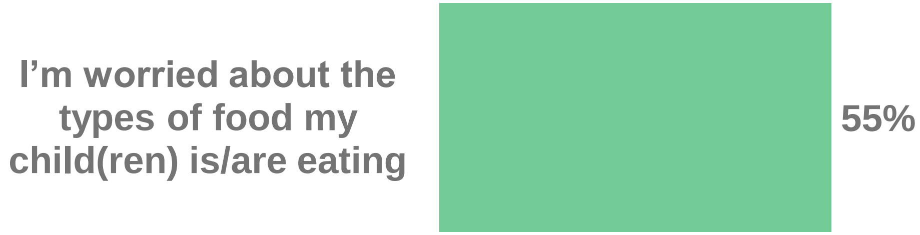
- AB 75% → DE 48% very/quite healthy



62% say the kinds of food their children eat are very / quite healthy

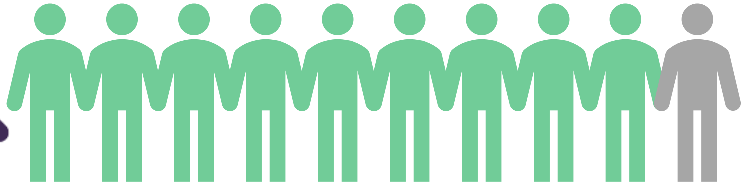
Significant difference by SEG:

- AB 71% → DE 56% very/quite healthy

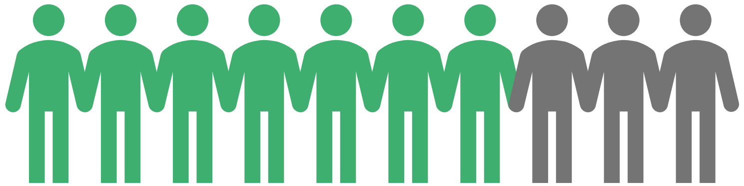


Q17 Thinking about the kind of foods you normally eat and drink at the moment (both for meals and snacks), how healthy do you feel these are? Base: All respondents W12 1009
Q16 And thinking about the kinds of foods your children eat and drink at the moment (both for meals and snacks), how healthy do you feel these are? Base: W12 286 (those with children)
Q20 How much do you agree or disagree with each of these statements? Base: W12 286 (those with children)

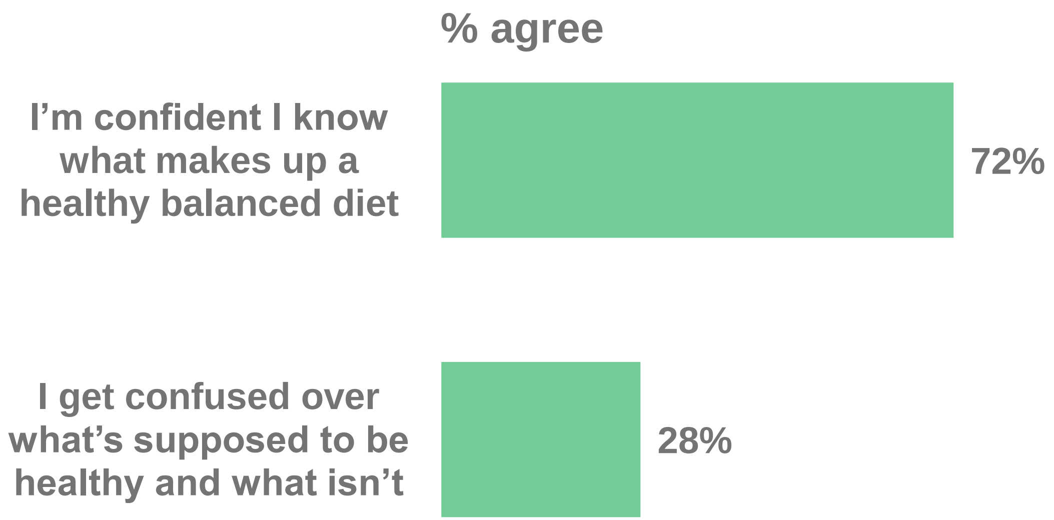
Although the majority of adults in Scotland are confident they know what makes up a balanced diet and feel they have clear information on this, two-thirds say further guidance would be useful. Those in lowest socio-economic groups are least confident / informed.



87% say they have clear information on eating a healthy balanced diet



66% say that further guidance on eating a healthy balanced diet would be useful to them



Significant differences by SEG across most measures:

- AB 90% → DE 81% have clear information
- AB 81% → DE 66% confident in knowledge
- AB 23% → DE 34% confused

Food Standards Scotland

Q20 How much do you agree or disagree with each of these statements? Base: W12 1009
Q14 Do you have clear information on...? Base: All respondents W12 1009
Q39 To what extent would further guidance on eating a heathy balanced diet be useful for you personally? Base: W12 1009

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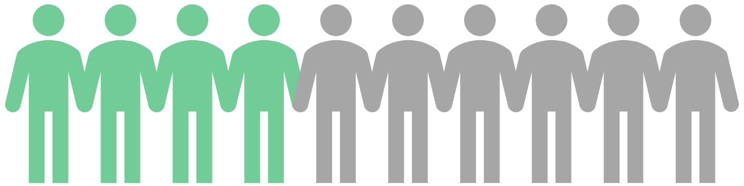
Consistent with last year, two-fifths of consumers recognised the Eatwell Guide, and just over a third of them had used it. The Guide is well understood by most of those aware of it.

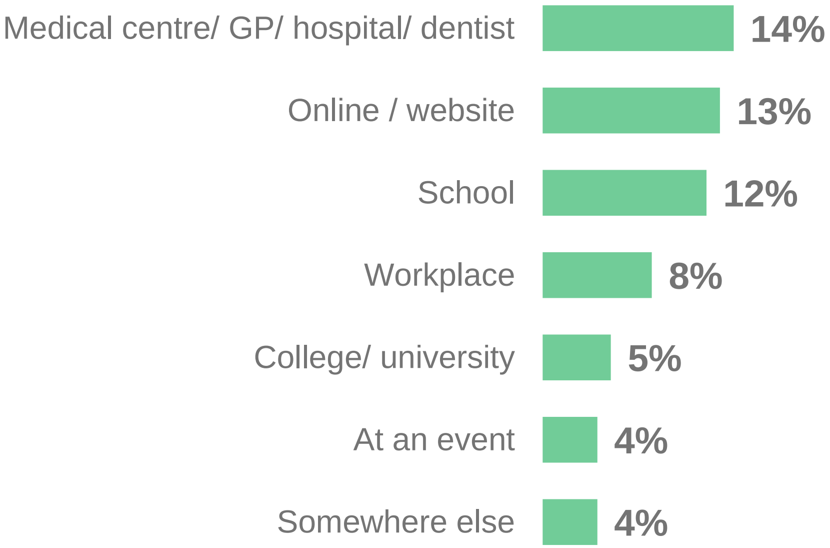


43% have seen the Eatwell Guide

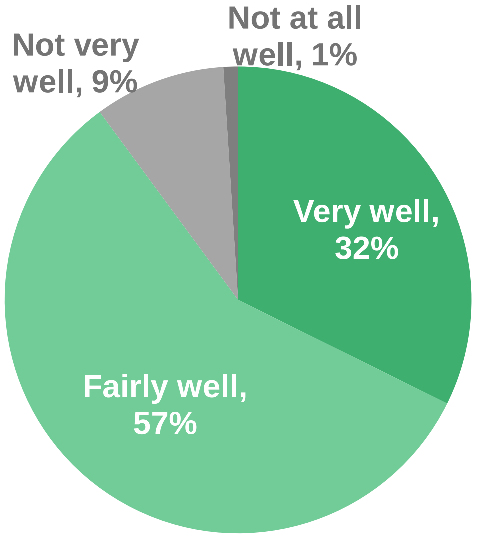
35% of those aware of the guide have used it

Females (52%), 16-34yr olds (66%) and those with kids at home (64%) were most likely to recognise the Guide.

Where Eatwell Guide Seen

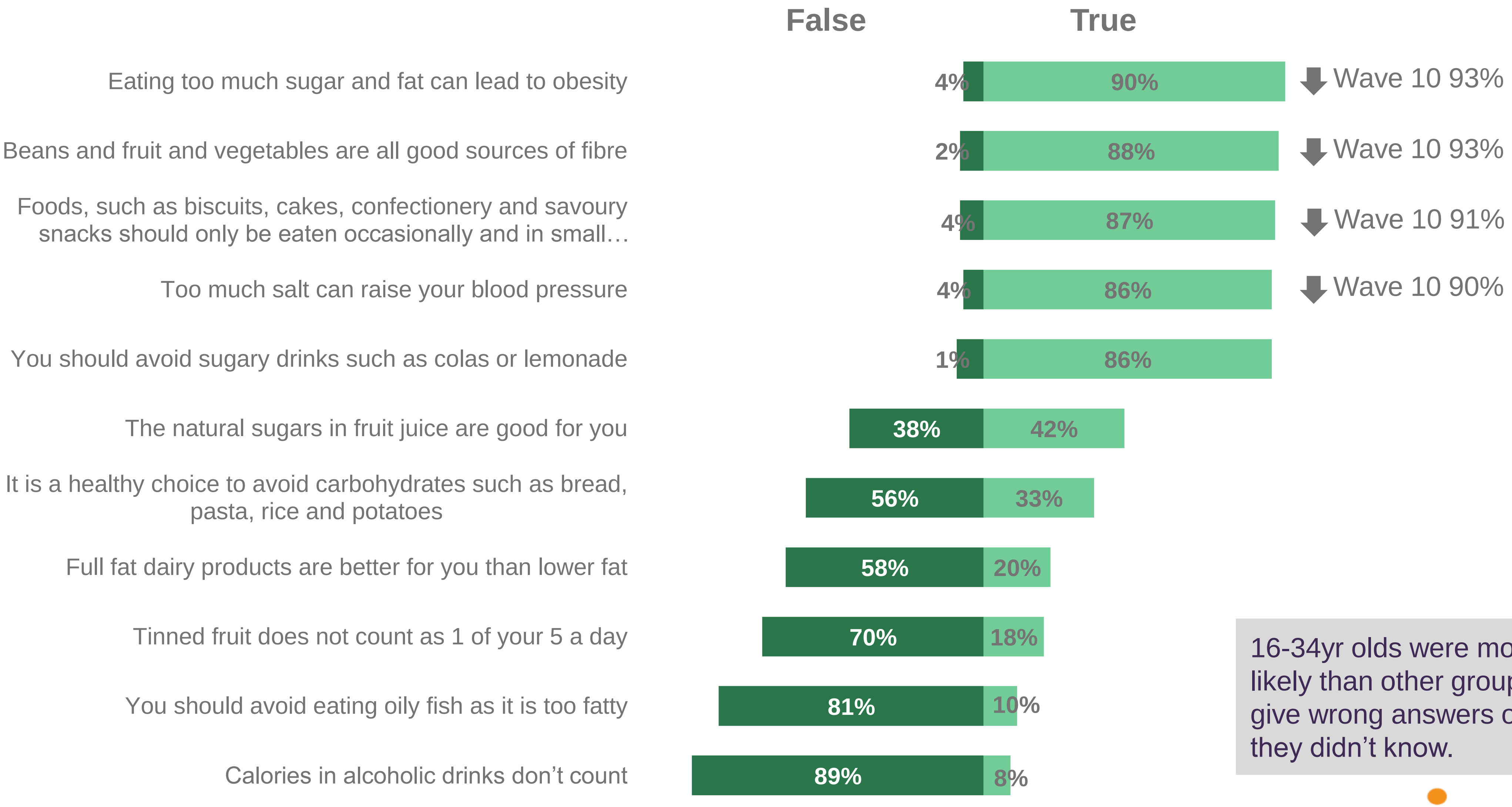


Understanding Eatwell Guide



Q36 Have you seen the Eatwell Guide? Base: W12 1009
Q37 How well do you feel you understand the Eatwell Guide? Base: 433 W12 (those aware of guide)
Q38 Have you personally used the Eatwell guide? Base: 433 W12 (those aware of guide)

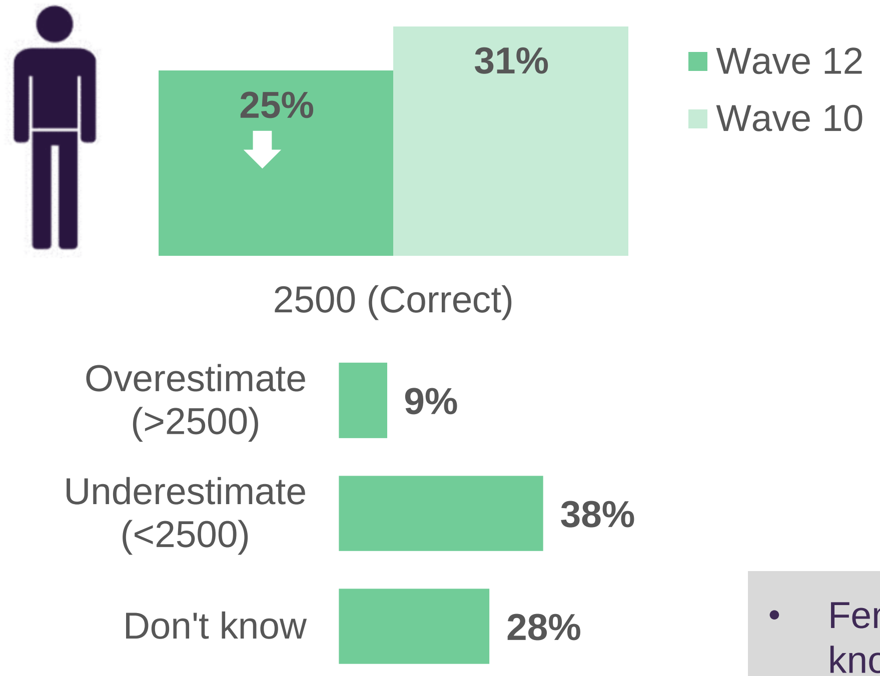
Most of the key principles around eating a healthy balanced diet are understood by adults in Scotland. Some uncertainty does exist around natural sugars, carbohydrates and full fat dairy.

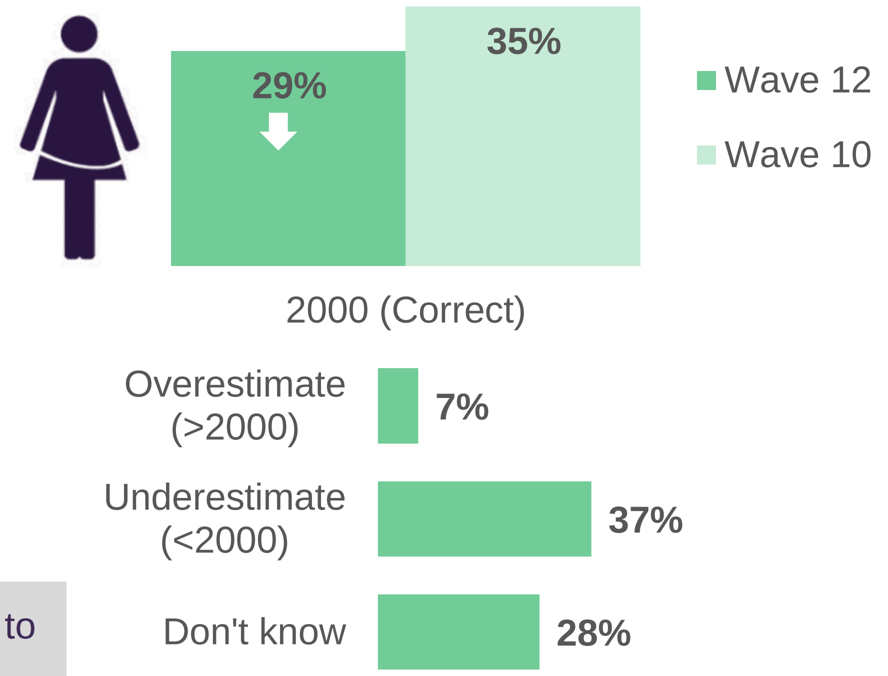


16-34yr olds were more likely than other groups to give wrong answers or say they didn't know.

Q23 How much do you agree or disagree with the following statements that other people have made? Base: W12 1009

Around a quarter know the correct recommended calorie intake for males and females, significantly fewer than last year. While around quarter simply don't know, most of those giving incorrect answers underestimate.





- Females were more likely than males to know the correct figure, in both cases
- Over 65s and DEs were more likely than others not to know the recommended number for males or females

Food Standards Scotland

Q22 How many calories should an average man have per day? Base: W8 1069, W10 1015, W12 1009
Q23 How many calories should an average woman have per day? Base: W8 1069, W10 1015, W12 1009

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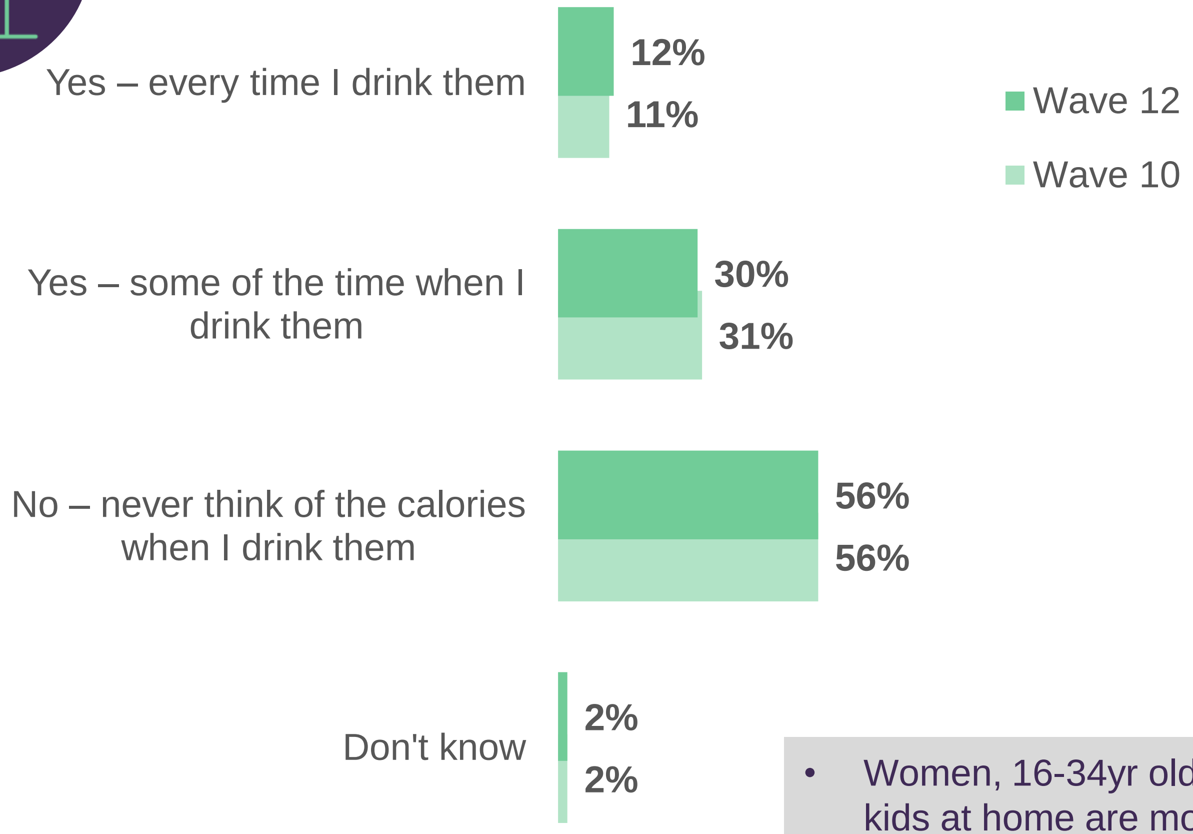
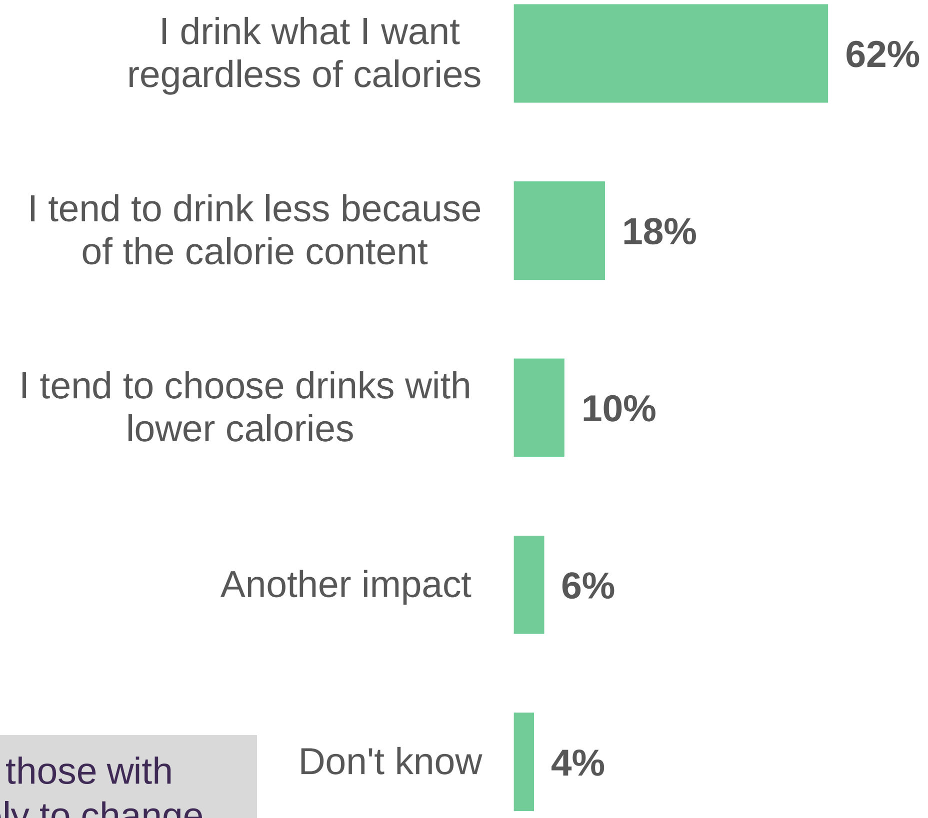
Consistent with Wave 10, more than half of those who drink alcohol never think about the calorie content. Although 6 in 10 drink what they want regardless of calories, almost a fifth drink less because of the calorie content.

Aware of Calories in Alcoholic Drinks



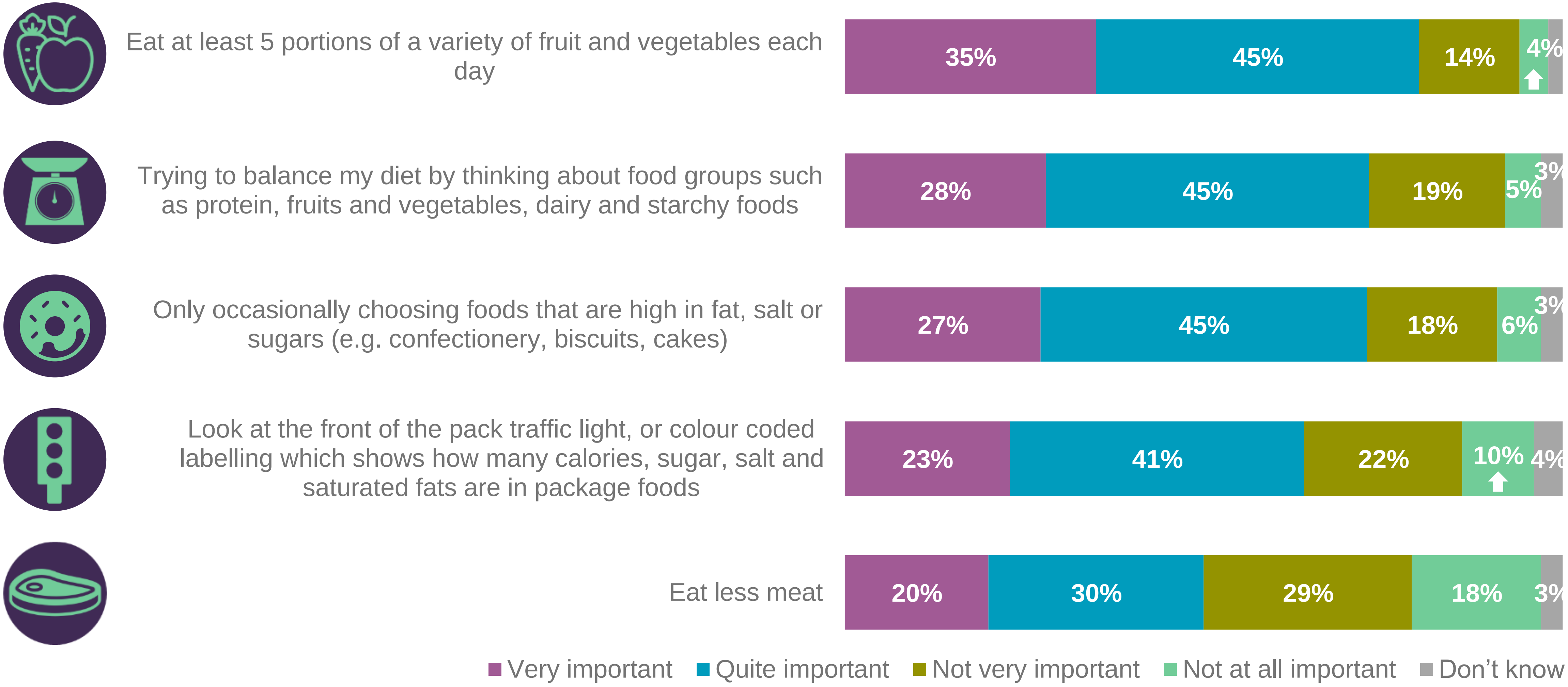
Impact of Calories on Drinking Behaviour



- Women, 16-34yr olds and those with kids at home are most likely to change their drinking behaviour to account for calorie content

Q26 If you drink alcoholic drinks, are you aware of how many calories are in them? Base: (those who drink alcohol) W10 774, W12 796
Q26a Do the calories in alcohol have any impact on what or how much you drink? W12 796

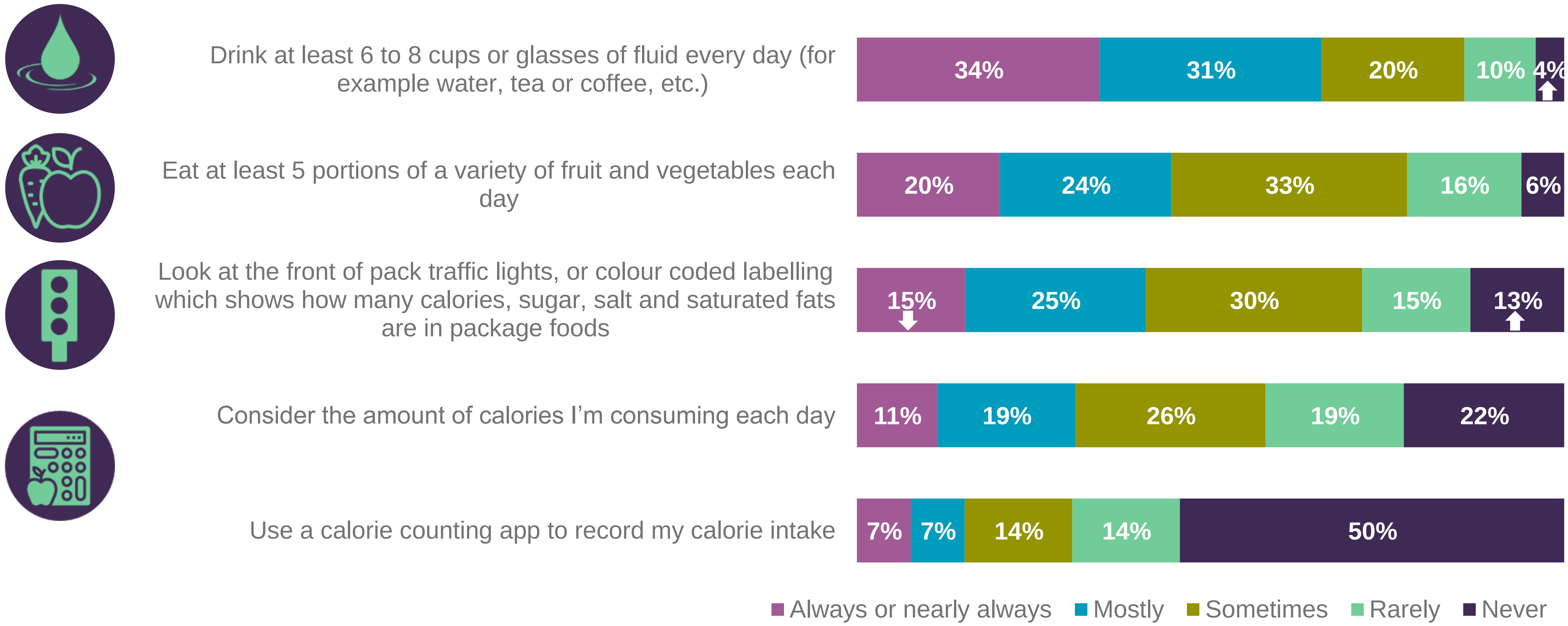
Eating 5 portions of fruit/veg every day is the most important consideration for consumers, followed by trying to balance their diets and only occasionally consuming foods high in fat, salt or sugar.



- Females were more likely than males to think about trying to balance their diet and eat less meat

Q22 How important are these to you when thinking about what you eat and drink? Base: W12 1009

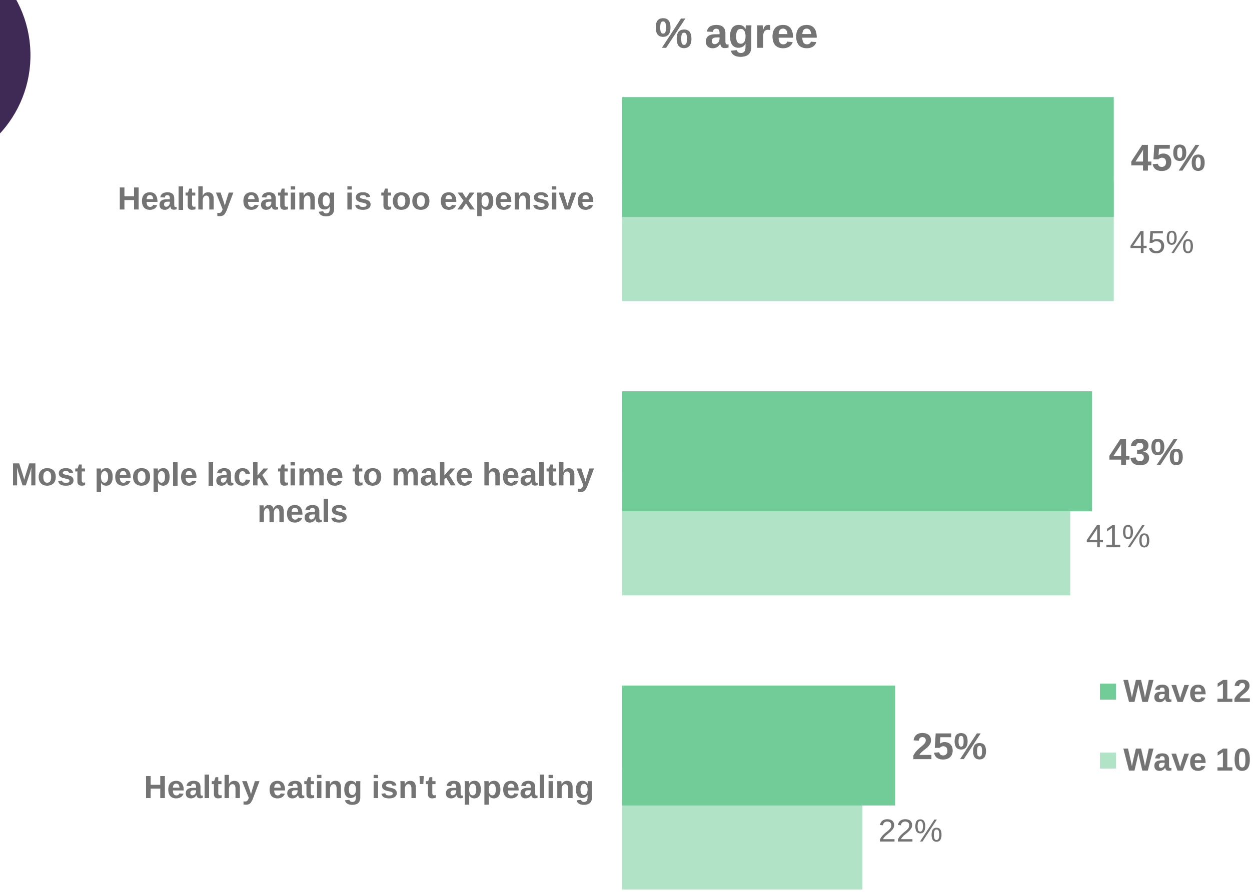
Relatively few manage to *always* achieve the recommended practices in terms of fluid intake or fruit/veg consumption. Use of nutrition labelling has decreased from last year and calorie monitoring is regularly done by under a third.



- 28% DEs rarely/never eat 5 a day; ABs & 65+yrs always do
- Younger age groups more likely to calorie count (and use app to record)

Q21 Looking at each of these statements, please indicate how regularly you do this? Base: W12 1009

Barriers to healthy eating remain at consistent levels as in previous years with cost and time the most common.

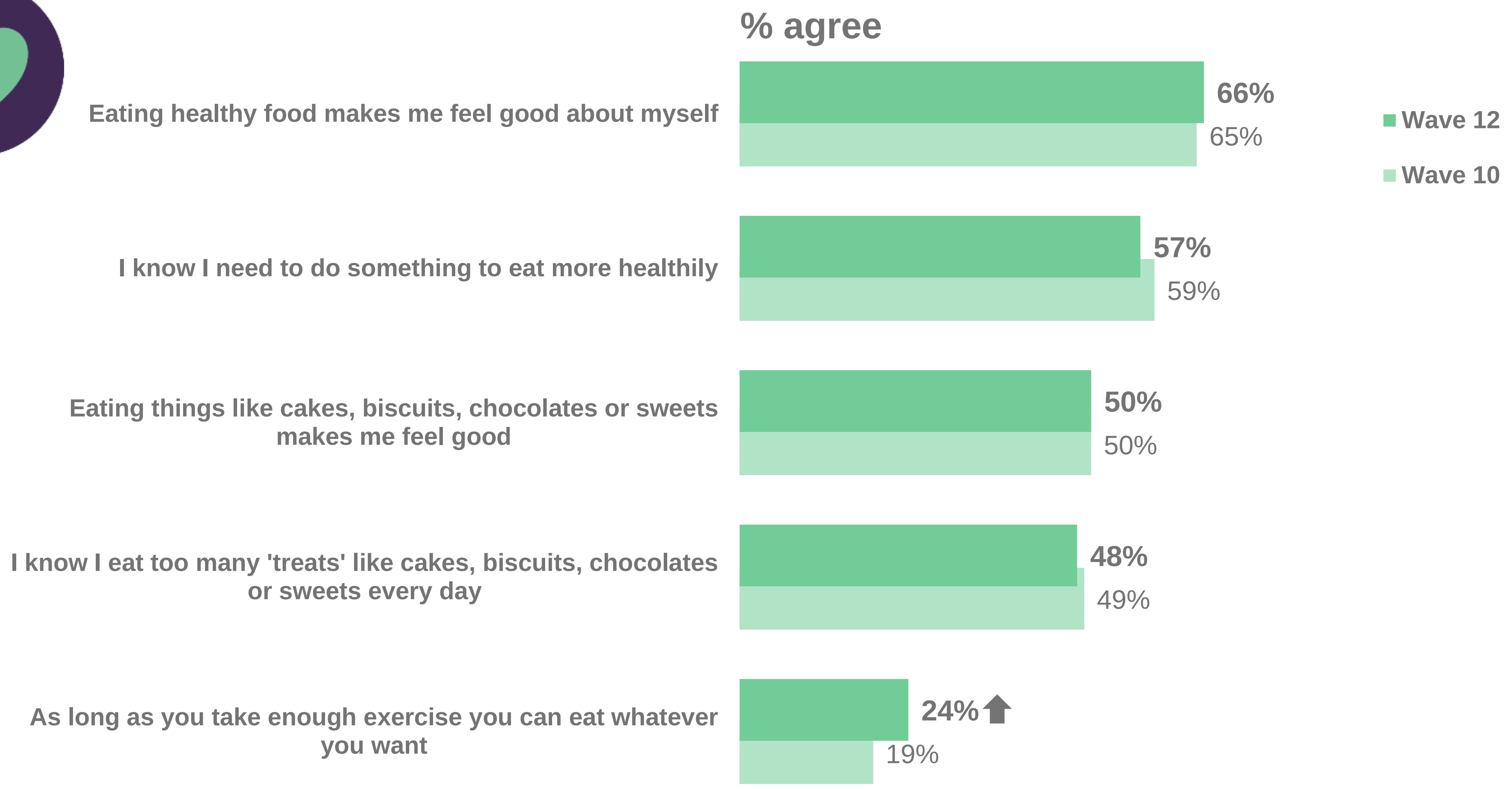


Cost is cited as a particular barrier for:
- 16-34yr olds, C2s, DEs and those with kids at home

Time is a particular barrier for:
- 16-34yr olds, females, DEs and those with kids at home

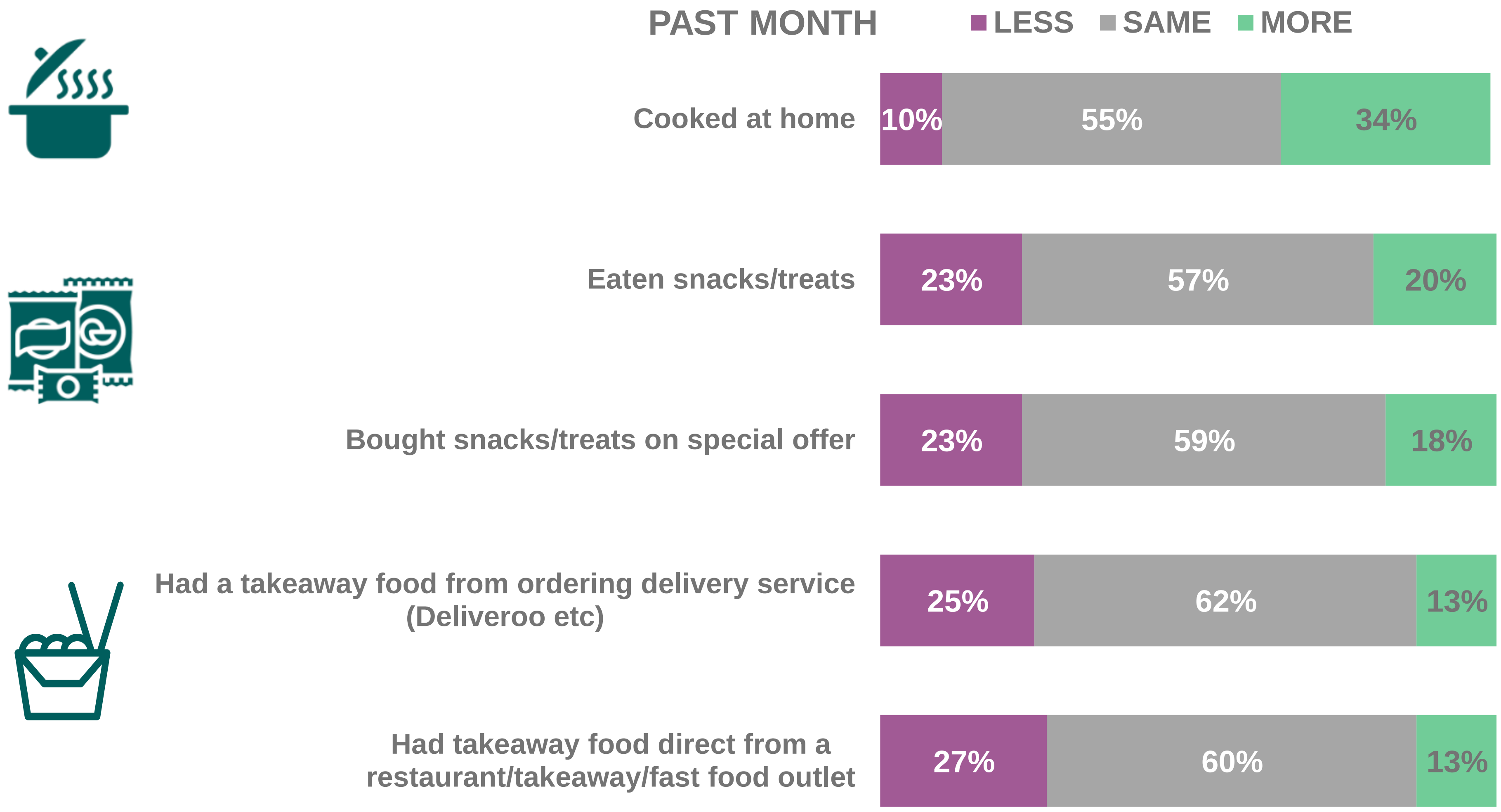
Q20 How much do you agree or disagree with the following statements that other people have made? Base: W10 1015, W12 1009

Two thirds say eating healthy food makes them feel good about themselves, but half also agree eating cakes and treats make them feel good. Almost 6 in 10 admit they need to do something to eat more healthily.



Q20 How much do you agree or disagree with each of these statements? Base: W10 1015, W12 1009

While many reported no change in behaviour compared with the previous month, a third did cook at home more often and around a quarter reported less consumption of snacks or takeaways.



Women and 16-34yr olds were more likely than others to have bought / eaten MORE snacks / treats

Women, 16-34yr olds and DEs were most likely to have had MORE takeaways

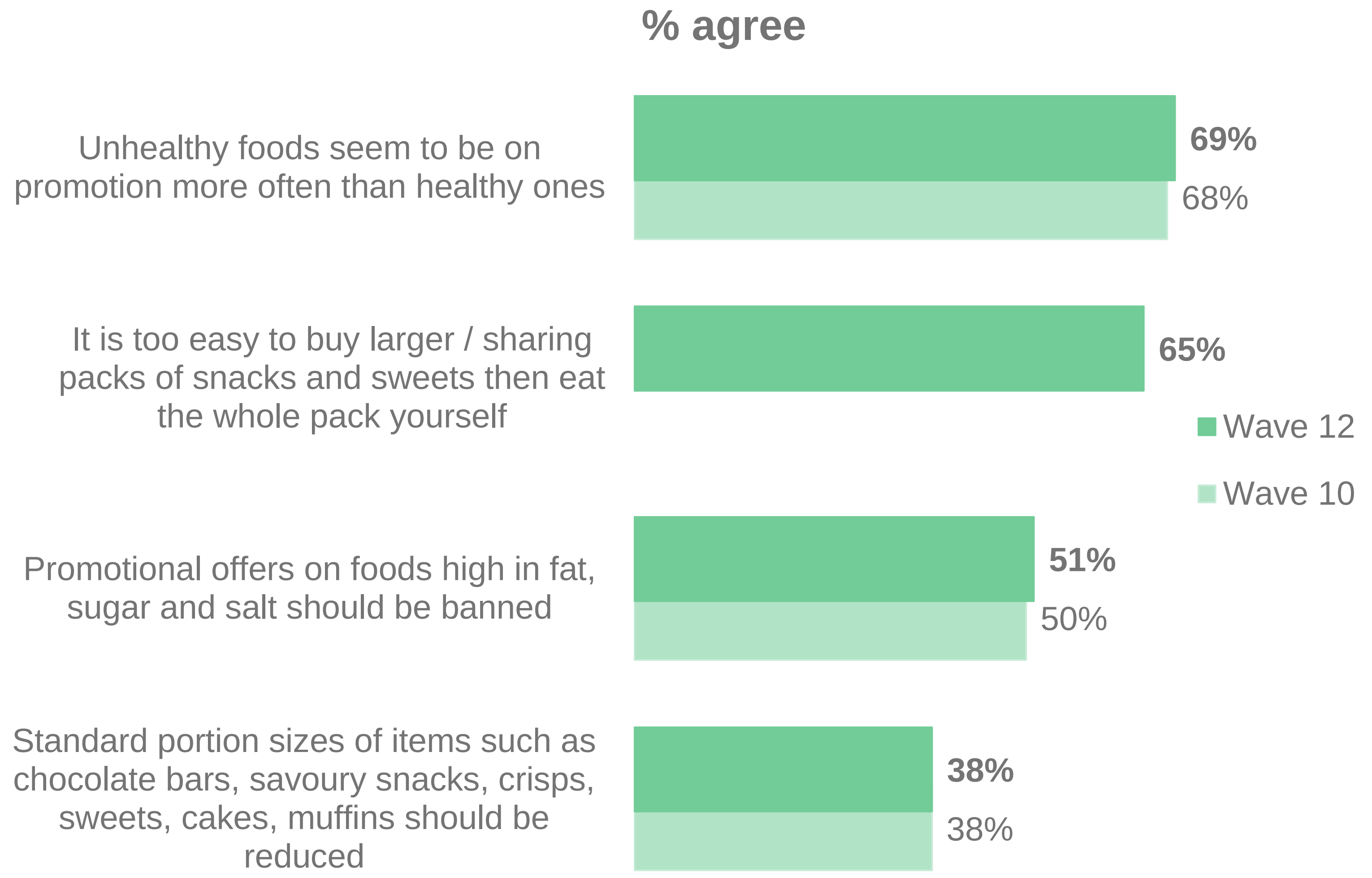
Food Standards Scotland

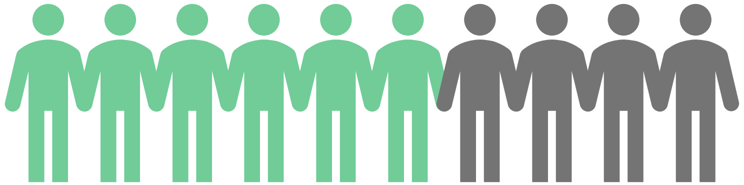
Note: time period changed so data not comparable with previous waves

Q30 Looking at the list below, please indicate whether you have done each of these more or less in the last month, or whether you have not changed these. Base: W12 1009

jrs the research consortium

Consumers are aware of the prevalence of promotional offers on unhealthy foods, and consider it too easy to buy and eat larger packs. Many support restrictions on marketing / promotion of these foods, but fewer support reduction of portion sizes.





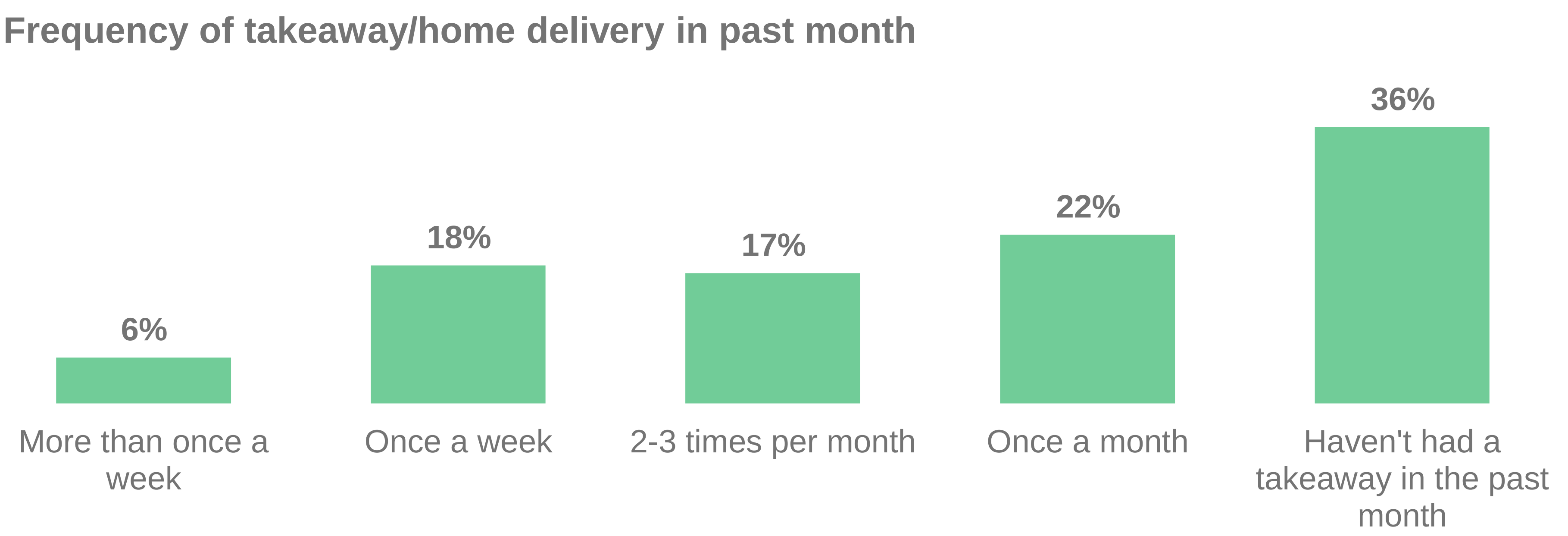
57% would support restricting the marketing / promotion of some unhealthy food/drink

69% of 65+yr olds support

Q33 Would you support restricting the marketing / promotion of some unhealthy food/drink inside shops / supermarkets or online? Base: W12 1009

Q34 These statements are about food and drink in the shops and/or online food shops. Please indicate how much you agree or disagree with each one of these.. Base: W10 1015, W12 1009

Just over a third had not had takeaway / delivery food in the previous month. However, almost a quarter had takeaway once a week or more often, rising to almost two-fifths of 16-34yr olds.

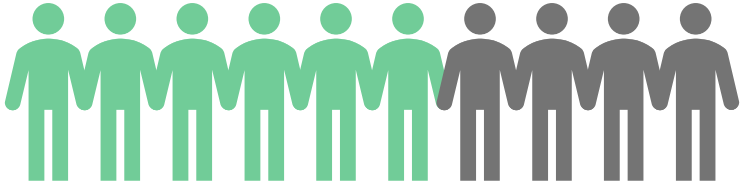


- 16-34yr olds were more likely than any other group to have had a takeaway/delivery once a week or more (37%)
- While 52% of 55-64yrs and 66% of 65+yrs had not had any takeaway/delivery food in the past month

Note: time period changed so data not comparable with previous waves

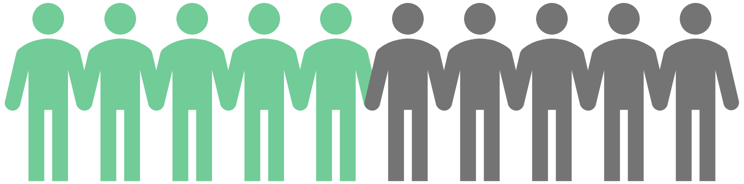
Q25 How often have you had takeaway/home delivery food in the last month? Base: W12 1009

Eating less healthily when eating takeaway / delivery food is common – partly as many simply don't want to think about healthy choices, but also due to lack of availability and clarity around healthy options.

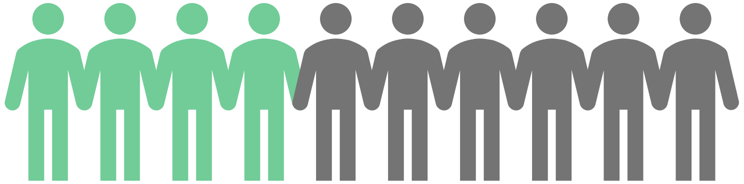


62% say they tend to eat less healthily when eating takeaway/ delivery food

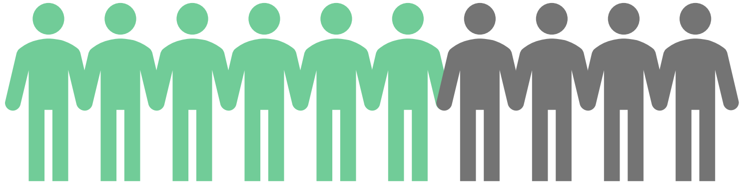
76% of 16-34yr olds agree



47% agree they don't want to think about healthy choices when ordering takeaway/delivery



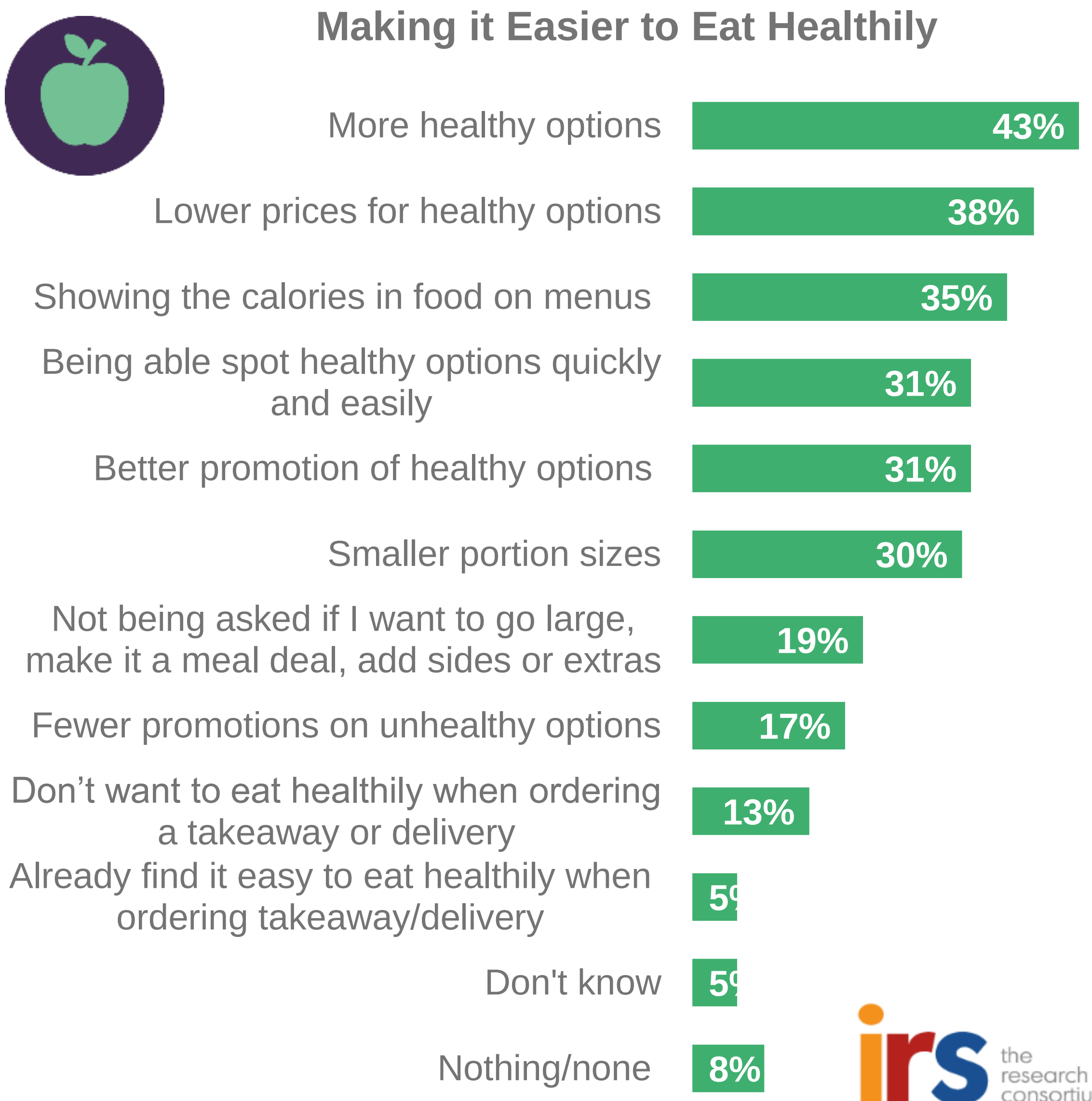
44% say they find it difficult to know which options are healthy and which are not healthy when ordering takeaway/delivery



57% agree there are not enough healthy choices when ordering takeaway/delivery

Q28 How much do you agree or disagree with the following statements? Base: W12 1009
Q29 Which, if any, of the following would make it easier for you to eat healthily when ordering a takeaway or delivery? Base: W12 1009

Although consumers tend to agree that takeaways should display calories on menus, and some feel portion sizes are too big, the main ways of making it easier to eat healthier takeaways are greater availability and lower cost of healthy options.



Food Standards Scotland

Q28 How much do you agree or disagree with the following statements? Base: W12 1009
Q29 Which, if any, of the following would make it easier for you to eat healthily when ordering a takeaway or delivery? Base: W12 1009

jrs the research consortium

Inequalities were evident in several key areas across the healthy eating data including: behaviour, knowledge and attitudes.

17% of DEs say the foods they eat are not healthy (vs 7% ABs)

28% of DEs rarely or never eat at least 5 portions of fruit / vegetables a day (vs 11% ABs)

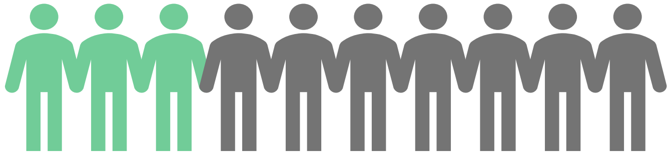
56% of DEs agree they eat too many treats every day (vs 36% ABs)

47% of DEs rarely / never consider the amount of calories they consume (vs 39% ABs)

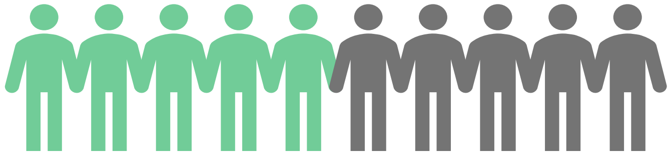
33% of DEs worried about affording food in the past year (vs 12% ABs)

20% of DEs skipped meals due to a lack of money / resources (vs 8% ABs)

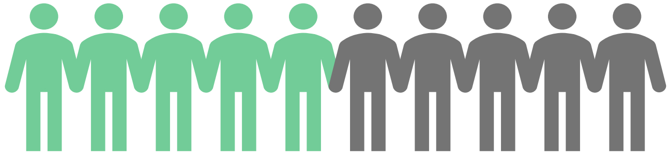
Attitudes towards healthy eating are generally less positive amongst those in DE socio-economic groups, and perceived barriers to healthy eating are greater.



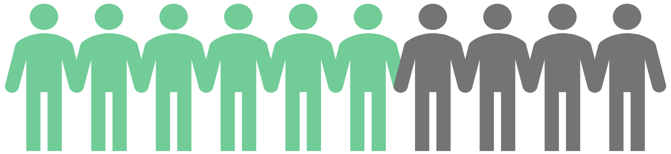
28% of DEs say healthy eating isn't appealing (vs 19% ABs)



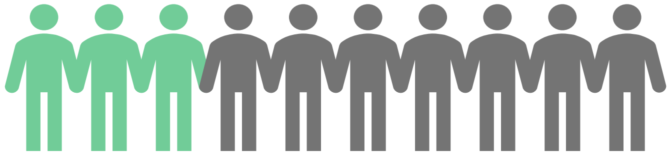
48% of DEs think most people lack time to make healthy meals (vs 33% ABs)



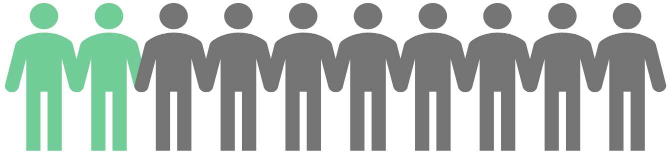
55% of DEs think healthy eating is too expensive (vs 35% ABs)



59% of DEs know they have to do something to eat more healthily (vs 46% ABs)

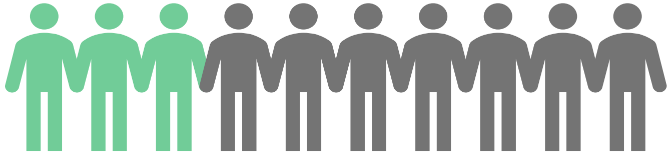


28% of DEs think trying to balance their diet by thinking about different food groups is not important (vs 19% ABs)

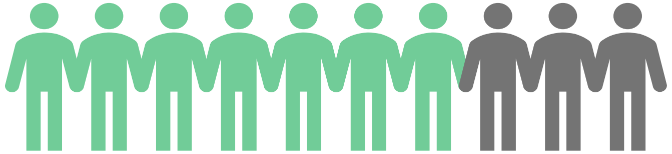


24% of DEs think eating 5 a day is not important (vs 14% ABs)

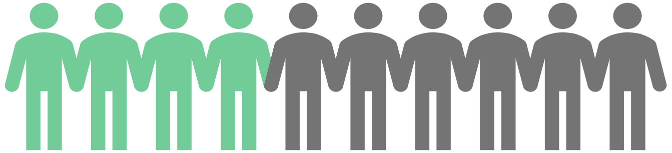
Those in DE socio-economic groups had lower levels of knowledge about healthy eating.



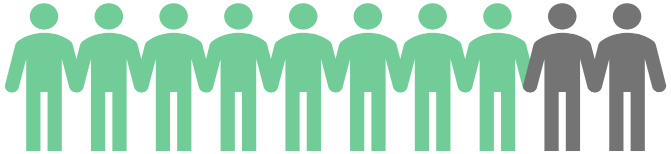
34% of DEs say they get confused about what's supposed to be healthy and what isn't (vs 23% ABs)



66% of DEs are confident they know what makes a healthy balanced diet (vs 81% ABs)



40% of DEs don't know the recommended calorie intake for males or females



81% of DEs say they have clear information on eating a heatlhy balanced diet (vs 91% ABs)

6. Covid-19

A new question set added in Wave 10 to help understand the impact of Covid-19 on the Scottish public.

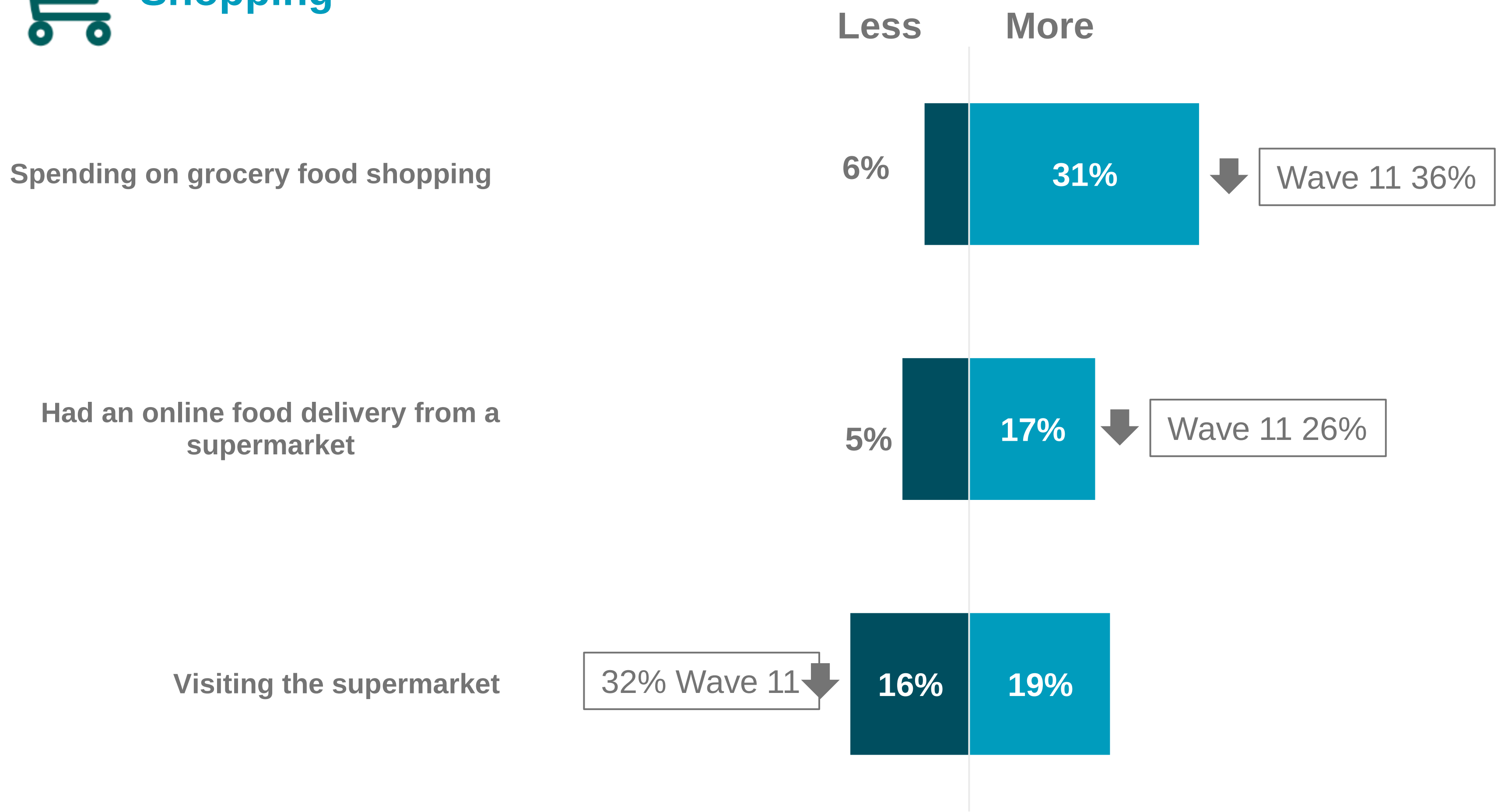
Questions focus on how Covid-19 has changed the way consumers eat, shop, cook and exercise.

Food Standards Scotland

jrs the research consortium

For most, shopping patterns are consistent with the previous month. However, some change is evident compared with last year with lower spending on groceries, fewer online deliveries and less avoidance of supermarket visits.

Shopping

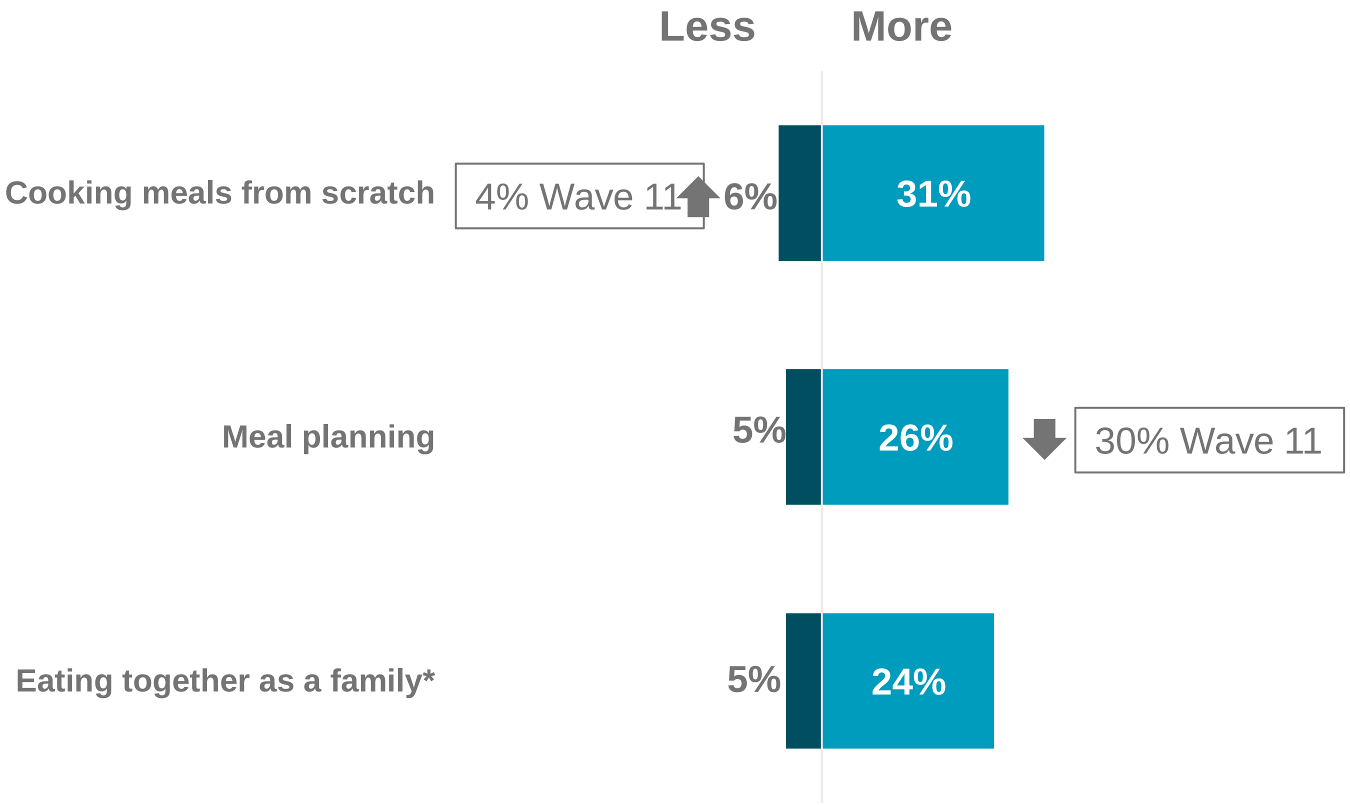


- Those with kids at home were more likely to be doing more of each of the shopping elements:
    - Spending more on groceries (40%)
    - Online food delivery (30%)
    - Visiting supermarket (27%)
- Perhaps linked to school holidays.

Q57 Compared to last month, to what extent, if at all, are you doing more or less of the following? Base W11 1016, W12 1009

Cooking habits are also largely consistent month on month, however there is a decline in the proportion doing more meal planning compared with the previous year.

Cooking

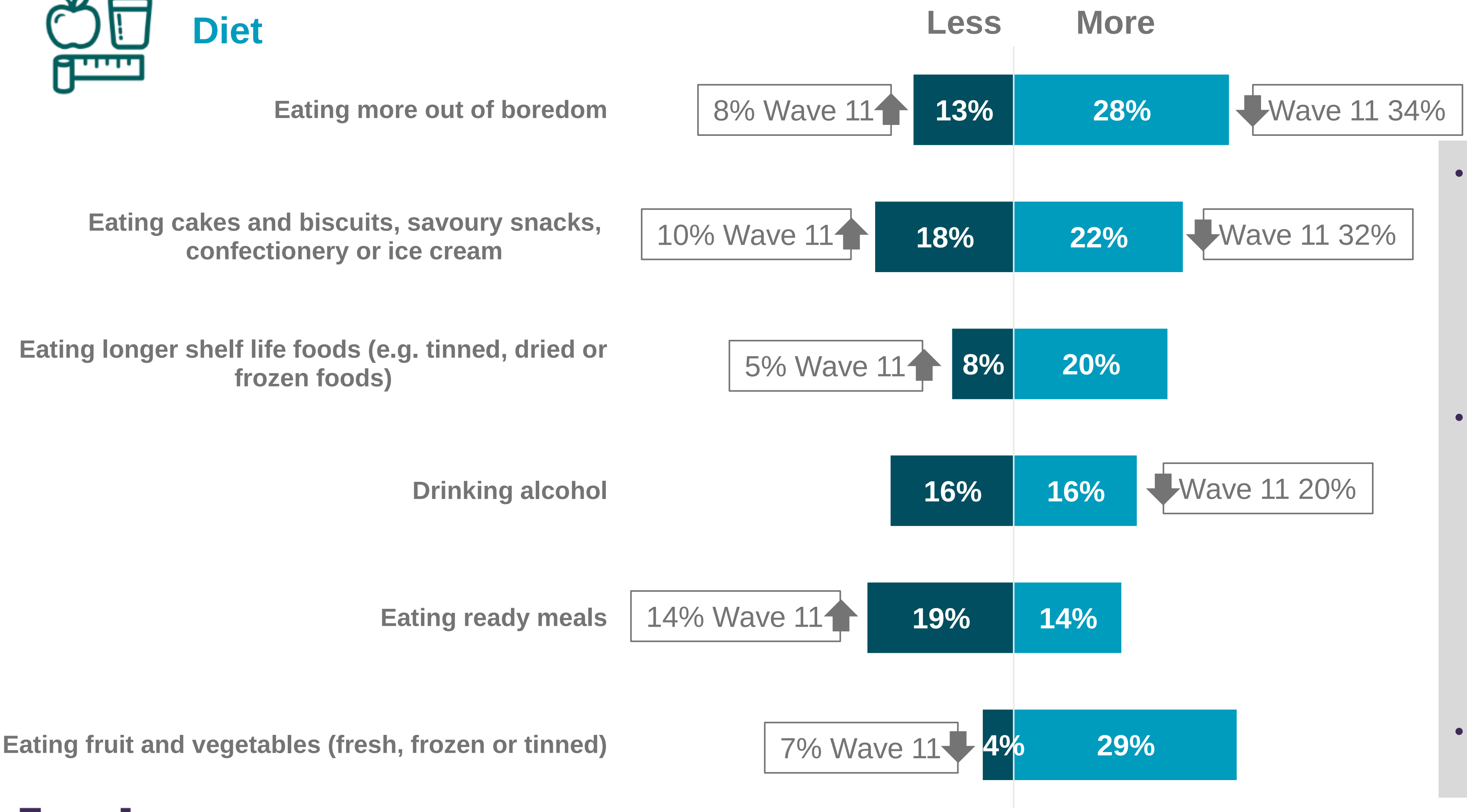


- Those with kids at home were more likely to be doing each of the 'cooking' actions more:
    - 46% cooking from scratch more
    - 42% meal planning more
    - 40% eating together as a family more
- Those in lower socio-economic groups were also doing more meal planning:
    - C2 (33%); DE (27%)
- 16-34yr olds doing more cooking from scratch (43%).

Q57 Compared to last month, to what extent, if at all, are you doing more or less of the following? Base W11 1016, 797*, W12 1009, 776* (all with >1 person in h/h

Data shows positive shifts in behaviour away from some of the habits formed in lockdown with fewer saying they are eating more out of boredom, eating more cakes, biscuits, snacks or drinking more alcohol.

Diet

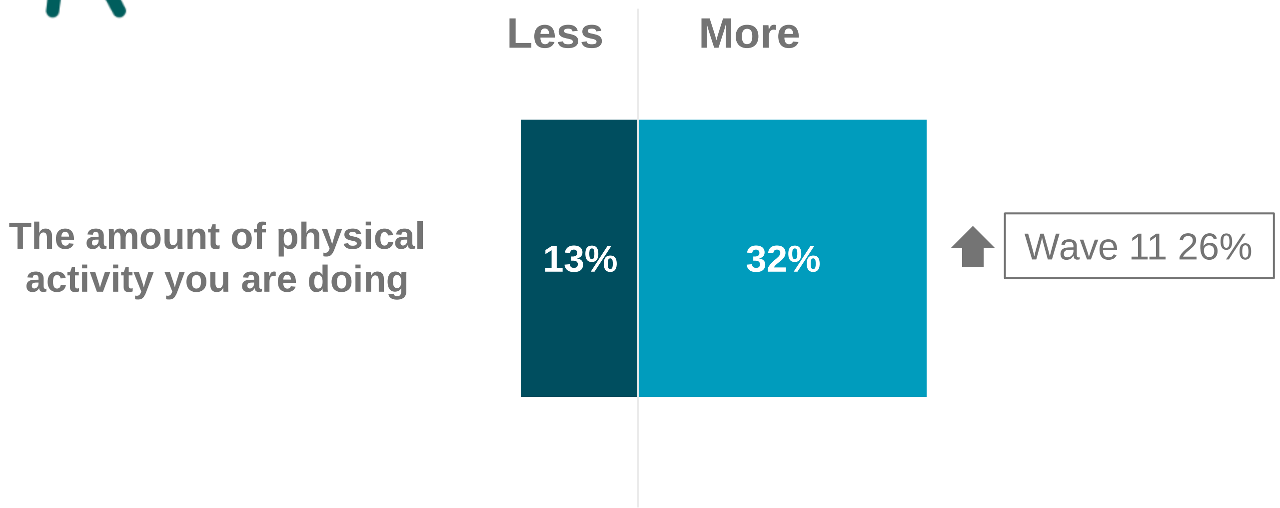


- 16-34yrs were more likely to exhibit 'negative' behaviours
  - 42% eating more out of boredom
  - 22% more ready meals
  - 34% more cakes/ snacks
  - 31% more longer life foods
- Lower socio-economic groups (DE) were also more likely to:
  - eat more out of boredom (33%)
  - eat more cakes / snacks (27%)
  - eat more longer life foods (26%)
  - eat more ready meals (21%)
- 40% of those with kids said they were eating more fruit & veg

Q57 Compared to last month, to what extent, if at all, are you doing more or less of the following? Base W11 1016, 797*, W12 1009, 776*

An increasing number said they were doing more physical activity than the previous month, +6% compared with the previous wave.

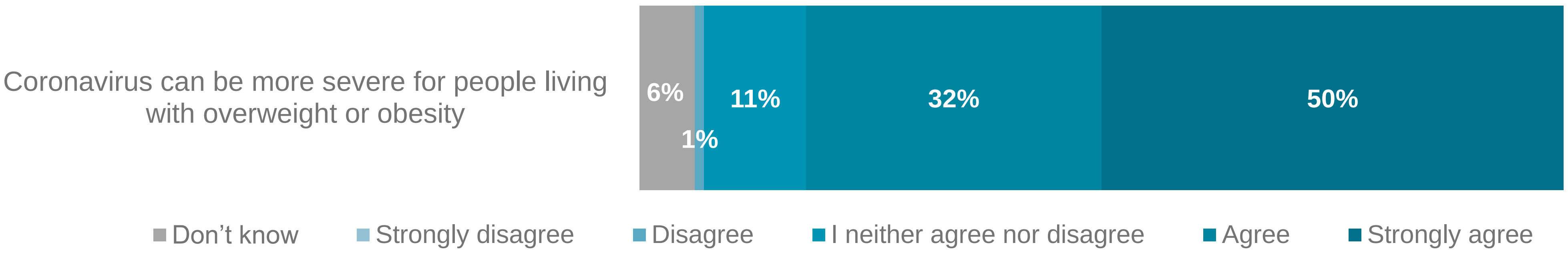
Physical Activity



- Some significant demographic differences were noted, with the following groups saying they were doing **much more** physical activity:
  - 16-34yr olds (18%)
  - Those with kids (14%)
  - AB socio-economic groups (12%)
  - DE socio-economic groups (11%)
  - Women (11%)

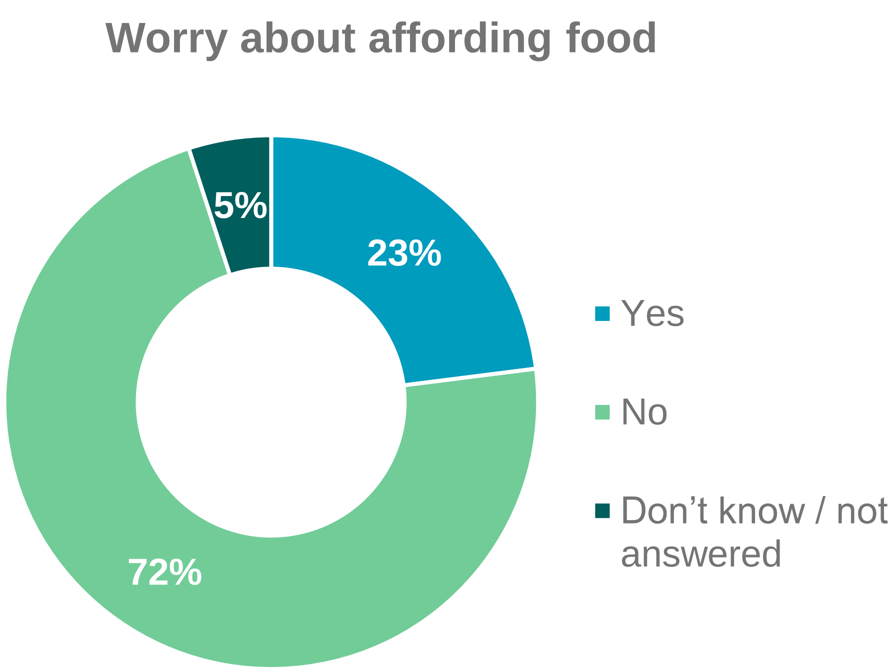
Q57 Compared to last month, to what extent, if at all, are you doing more or less of the following? Base W11 1016, W12 1009

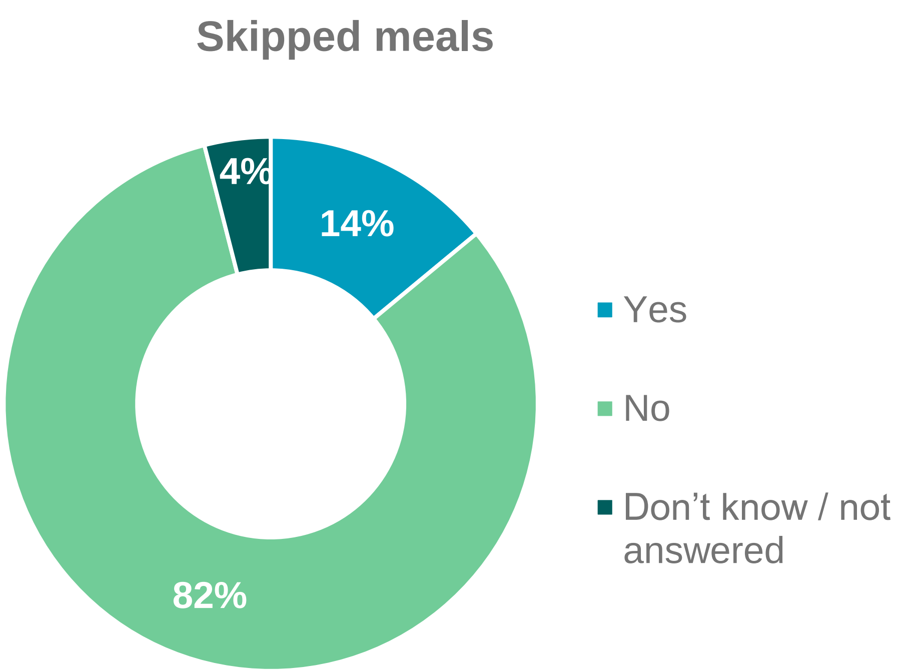
More than 8 in 10 agree that coronavirus can be more severe for people who live with overweight or obesity, an increase of 6% compared with Wave 11.



	Wave12 % agree	Wave11 % agree
Coronavirus can be more severe for people living with overweight or obesity	82%⬆	76%

Almost a quarter said they worried about being able to afford food in the last year, and 14% skipped meals as a result.





- Those with kids and those in lower SEGs more likely to have worried about affording food
  - Kids at home (36%)
  - C2 (27%); DE (33%)

- DEs (20%) and those with kids (24%) more likely to have skipped meals

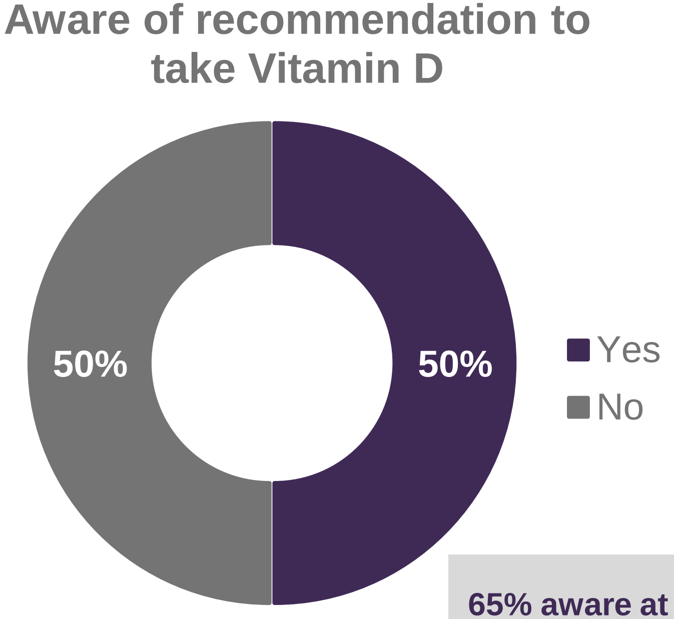
Q63 Over the last 12 months did you worry about affording food?
Q64 Over the last 12 months did you skip meals because of a lack of money or other resources? W12 1009

7. Vitamin D

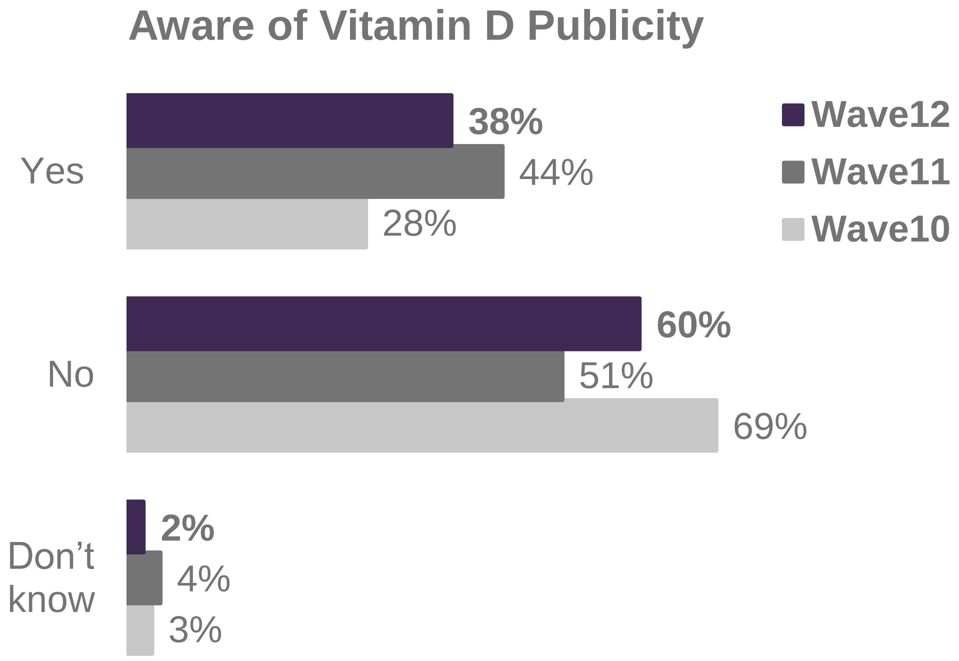
This expanded question set was added in Wave 12 to monitor awareness of the recommendation to take a vitamin D supplement in winter.

Questions also seek to understand barriers to uptake and awareness of advertising and publicity about vitamin D.

Half were aware of the recommendation to take a vitamin D supplement and almost two-fifths had seen advertising about this.



65% aware at post campaign research in March 2021



NOTE: question wording differed between waves

- Awareness higher amongst ABs (57%) and those in households with food allergies (62%)

- Awareness higher amongst those in AB socio-economic groups (41%) and those in households with food allergies (54%)

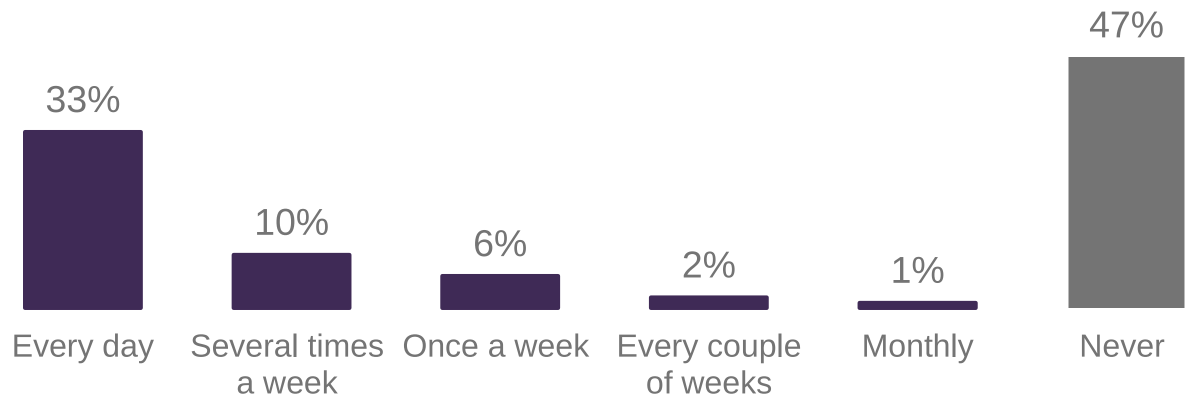
Food Standards Scotland

Q58 Have you seen or heard any advertising or publicity about taking a vitamin D supplement recently? BaseW12 1009
(W10 - Have you seen any information about taking vitamin D supplements during the coronavirus 'lockdown' period? W11 - Have you seen any information about taking vitamin D supplements during the last few months? Base W10 1015, W11 1016)
Q59 Are you aware of the recommendation to consider taking a daily vitamin D supplement between October and March each year? W12 1009

jrs the research consortium

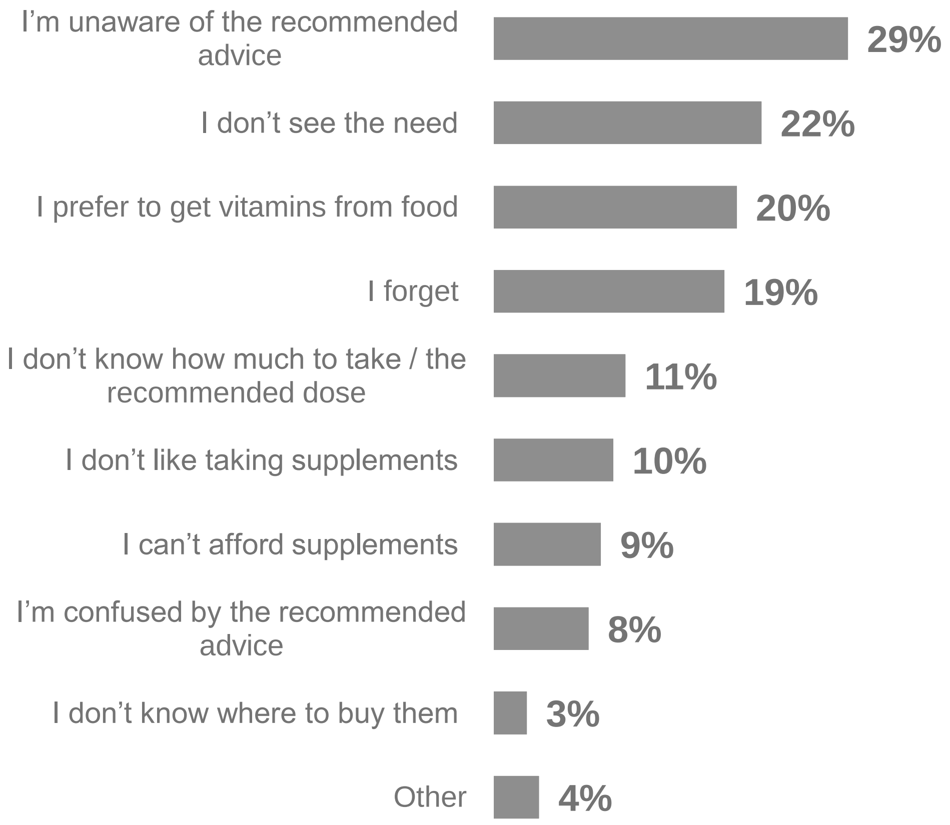
A third take vitamin D every day in winter, and a further 16% take a supplement at least once a week. Key reasons given for not taking a daily supplement are lack of awareness, forgetting, preferring to get vitamins from food and not seeing the need.

Frequency of taking Vitamin D in winter



- Females (37%), over 65yr olds (40%) and ABs (40%) were most likely to take a daily supplement in winter

Reason for not taking daily Vitamin D

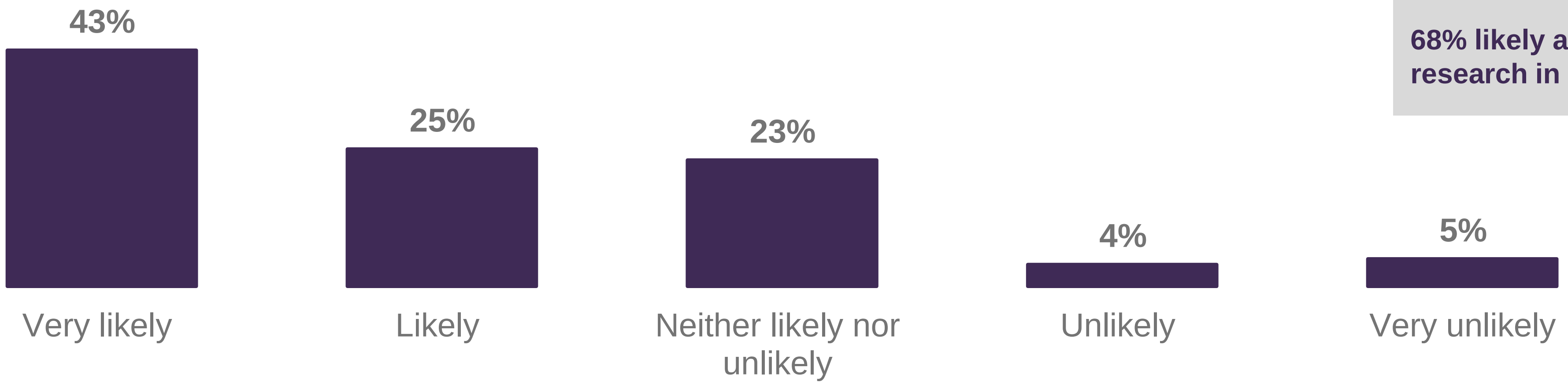


Q60 How often do you take a vitamin D supplement in winter? Base W12 1009
Q61 Why don't you take a daily vitamin D supplement? Base W12 677 (those who don't take daily in winter)

Two-thirds said they were likely to consider taking a daily vitamin D supplement in winter, after learning about the benefits.

In Scotland, we only get enough of the right kind of sunlight for our bodies to make vitamin D between April and September, mostly between 11am and 3pm. Taking a daily 10 microgram vitamin D supplement, particularly between October and March, supports bone and muscle health and reduces our risk of vitamin D deficiency.

Likelihood of considering taking Vitamin D in winter



68% likely at post campaign research in March 2021

Q62 Knowing these benefits now, how likely are you to consider taking a daily 10 microgram vitamin D supplement between October and March? Base W12 1009

8. Allergens

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
- Monitoring attitudes amongst the general public towards those with allergens.

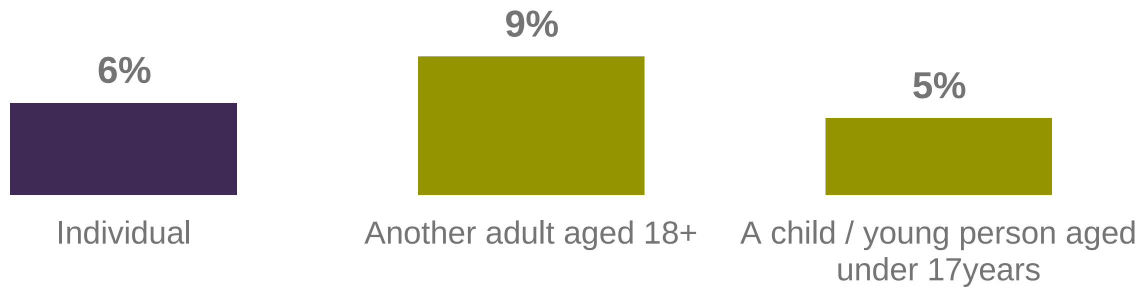
Food Standards Scotland

jrs the research consortium

Just over 1 in 10 households in Scotland contain at least one person with a food allergy. Food allergies are more common in adults than children, with milk, gluten and peanuts the most commonly mentioned types.

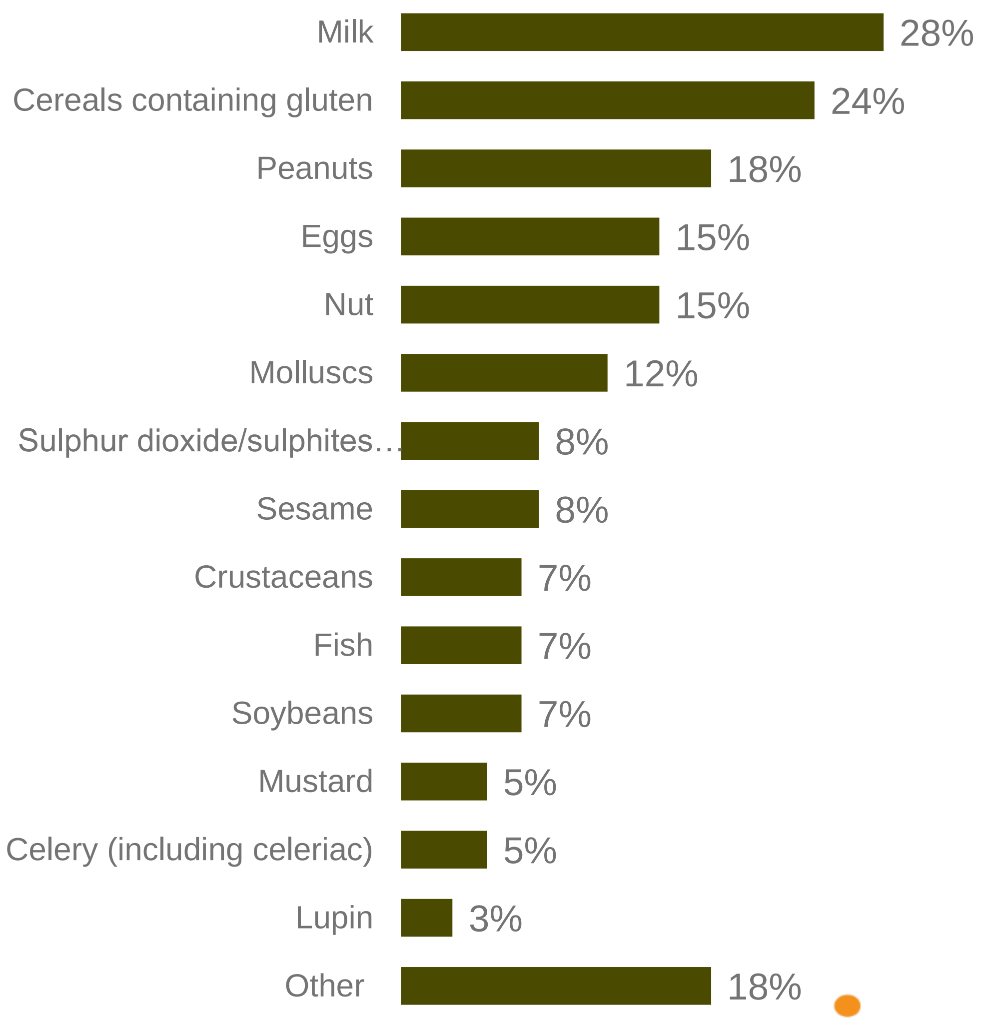
13% of Scottish households include at least one person with a food allergy

Food Allergies in Household



70% buy food for those with an allergy

Type of Food Allergy



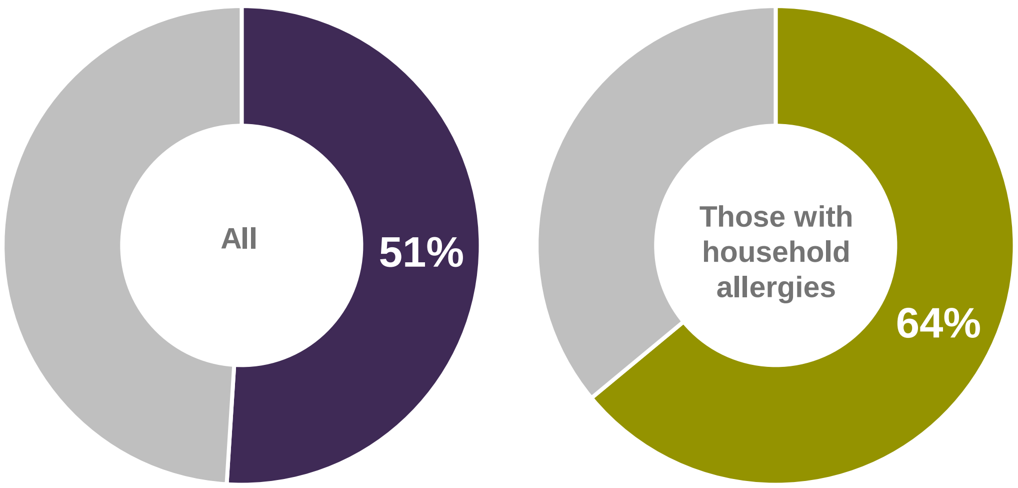
Food Standards Scotland

Q42 Does anyone in your household, other than you, have a food allergy? Base: W12 1009
Q43 Do you ever buy food for this person with the allergy? Base: W12 116
Q41 What are you allergic to? Q44 What is this person in your household allergic to? W12 116 (all with someone else in household with a food allergy)

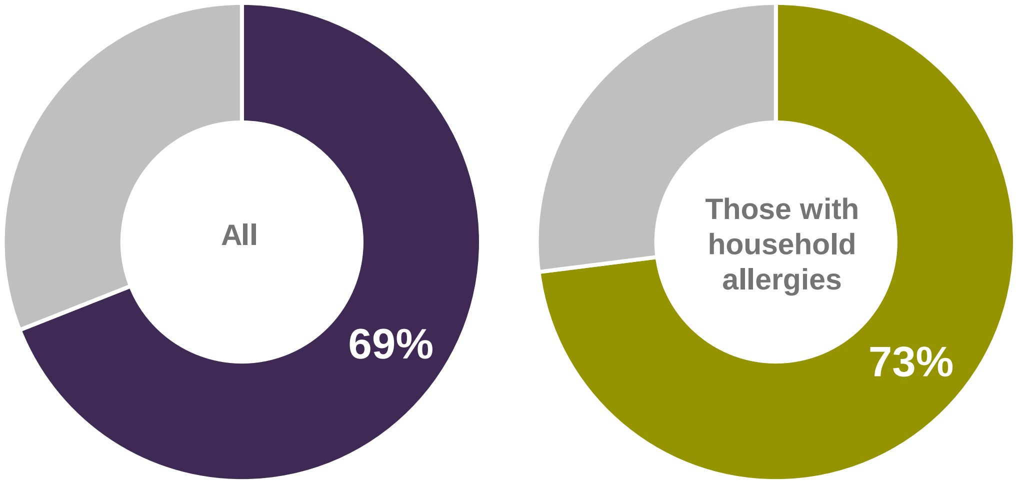
jrs the research consortium

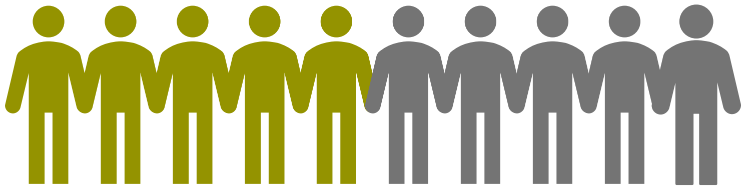
Concern about allergens in food is higher amongst those with household allergies, however they also feel they have clear information about allergens. Half of those with allergies know about the alert system, with a third signed up.

Concerned about allergens



Have clear information about ingredients which could cause allergic reactions





52% are aware of the allergen alert system – 32% have signed up

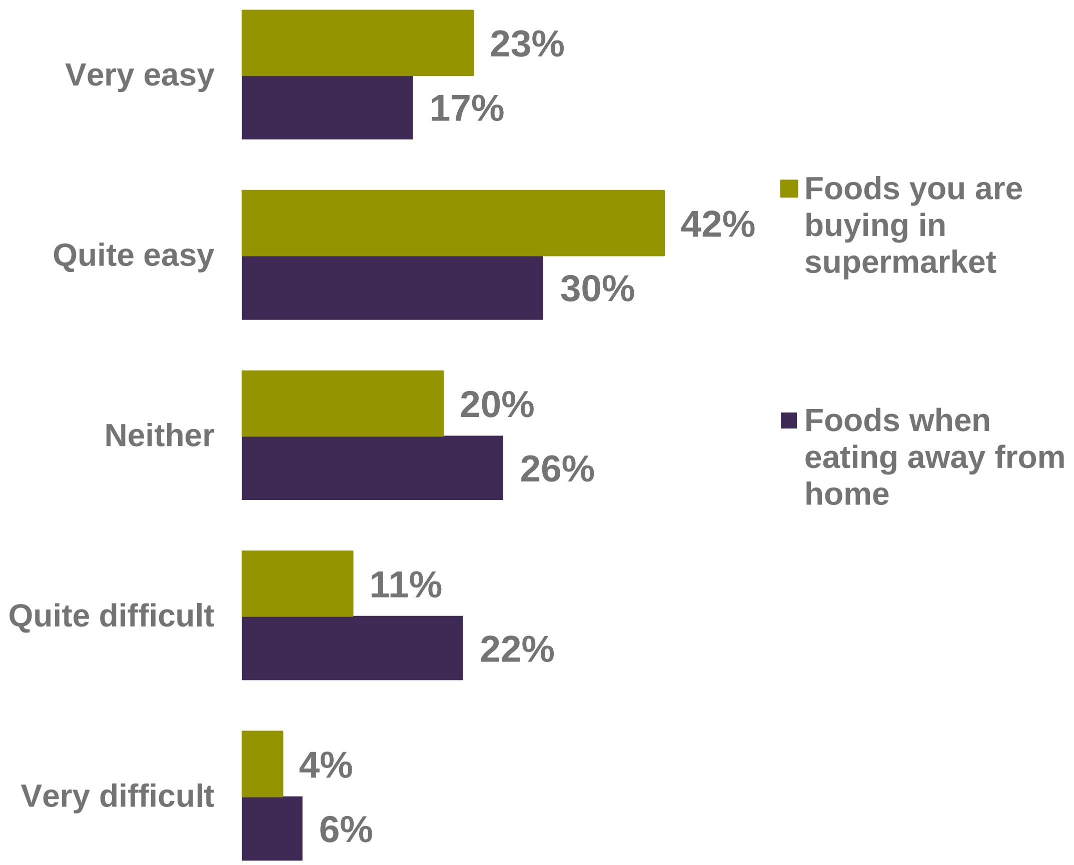
Frequency of carrying Epipen / Auto injector

23% always
15% sometimes
36% never
26% do not need one

Q12 Please sort each of these issues according to whether or not they cause you concern or do not cause you concern.
Q14 Do you have clear information on...?
Q45 Do you carry an Epipen or other auto-injector with you when you are eating out, in case of an allergic reaction to food? Base: W12 158 (all with allergy)
Q50 Are you aware that there is a text / email alert system to notify consumers of issues with missing or incorrect allergen information on food labels? Base: W12 158 (all with allergy)

Those with food allergies say it is easier to find allergy information in shops and supermarkets than in out of home settings. Food labels are the main source of information when shopping while staff and menus are important out of home.

Ease of Finding Allergy Info



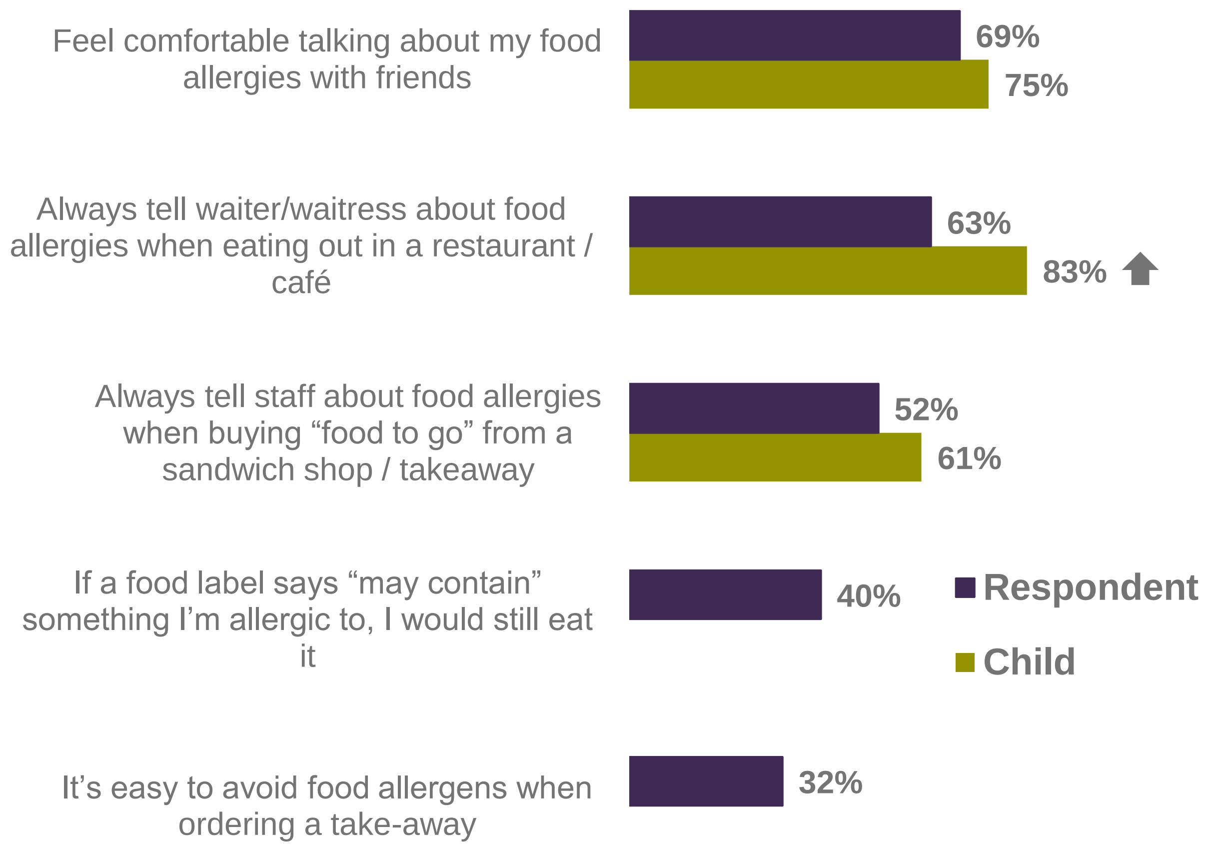
Main Sources of Allergy Info

	Shopping	*Eating out of home*
Ask staff for info	29%	48%
Labels on food	67%	39%
Info on menus	n/a	45%
Restaurant/store website/app	9%	7%
Other in restaurant/store info	26%	14%

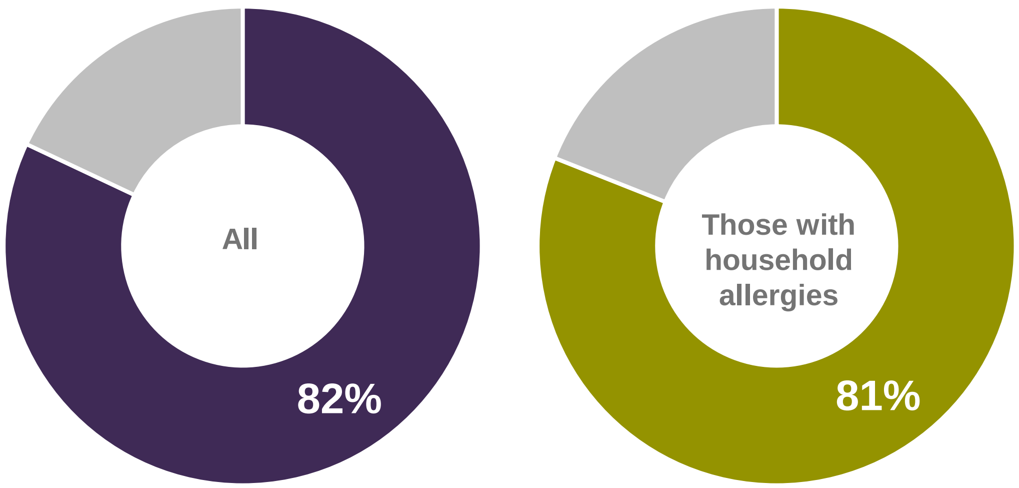
Q46 How easy or difficult is it to find allergy information about foods you are buying in shops and supermarkets? Base: W12 158 (all with household food allergy)
Q47 How easy or difficult is it to find allergy information about foods when you are eating away from home e.g. in a café or restaurant, or when ordering a take-away?
Q48 Where do you mainly get allergy information when shopping? Q49 Where do you mainly get food allergy information when eating out of the home?

Those with allergies largely feel comfortable discussing with friends and informing staff when eating out, particularly children. Only a third think it's easy to avoid allergens when ordering takeaway and the majority say allergens should be displayed on all takeaway menus.

Allergy Behaviours



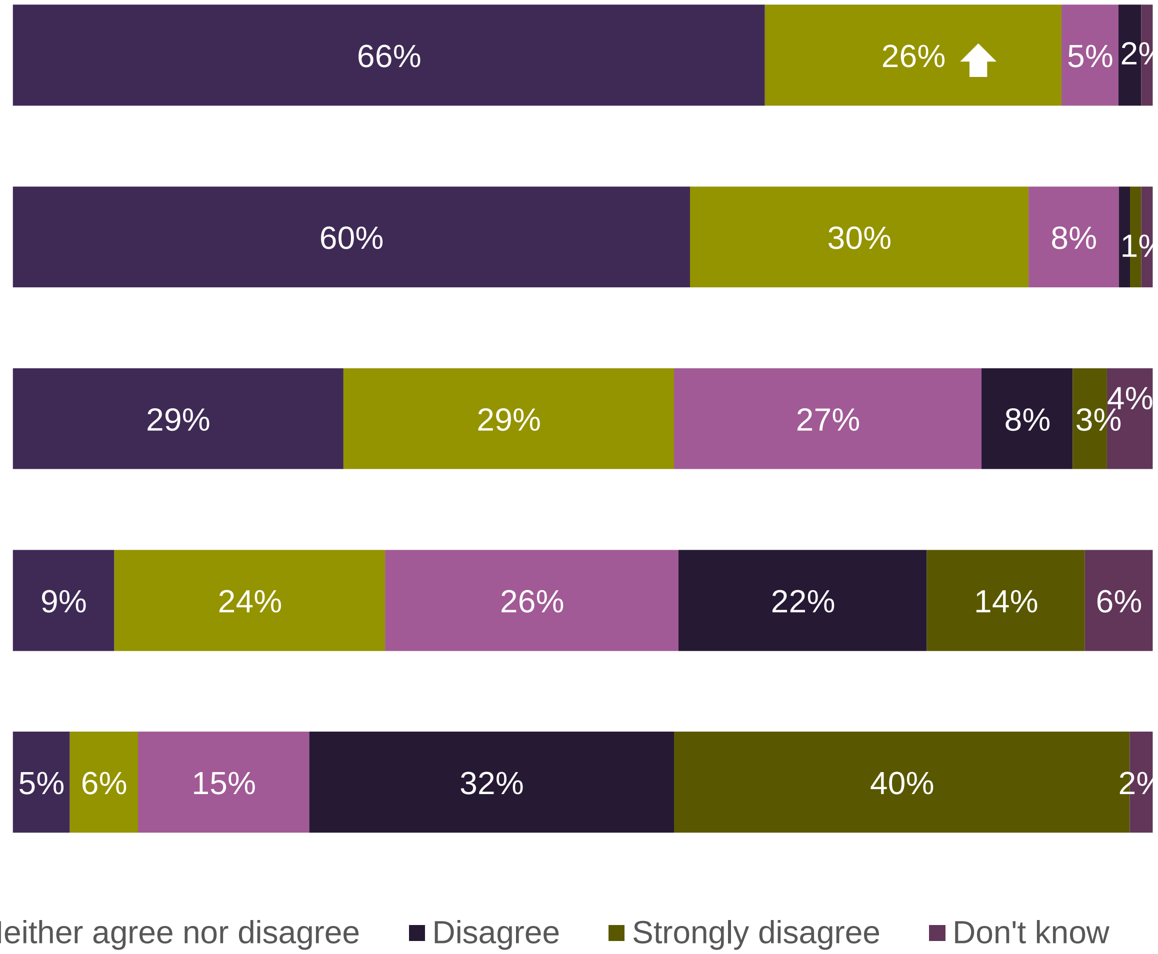
All takeaways should display allergens on their menus



Q51 To what extent do you agree or disagree with the following statements about your food allergies? Base, W12 61 (respondents with an allergy)
Q52 Thinking now about your child(ren) with food allergies, to what extent do you agree or disagree with the following statements? Base, W12 53 (those with kids with an allergy)
Q28 How much do you agree or disagree with the following statements?

Amongst the general public attitudes towards food allergies remain consistent with most agreeing these can be life-threatening and that there is no stigma associated. Those with food allergies are more sceptical about others' food allergies and intolerances.

% agree	W12	W11	W10
Food allergies can be life-threatening	92%	88%	91%
Having a food allergy is nothing to be embarrassed about	90%	87%	89%
I always check if people I'm cooking for have a food allergy	58%	62%	54%
I don't believe that all the people who say they have a food allergy really do	33%	29%	32%
Food intolerances are a myth	11%	10%	8%

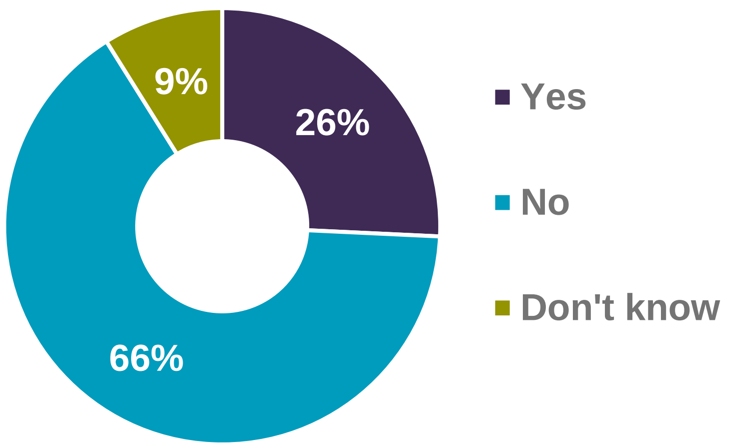


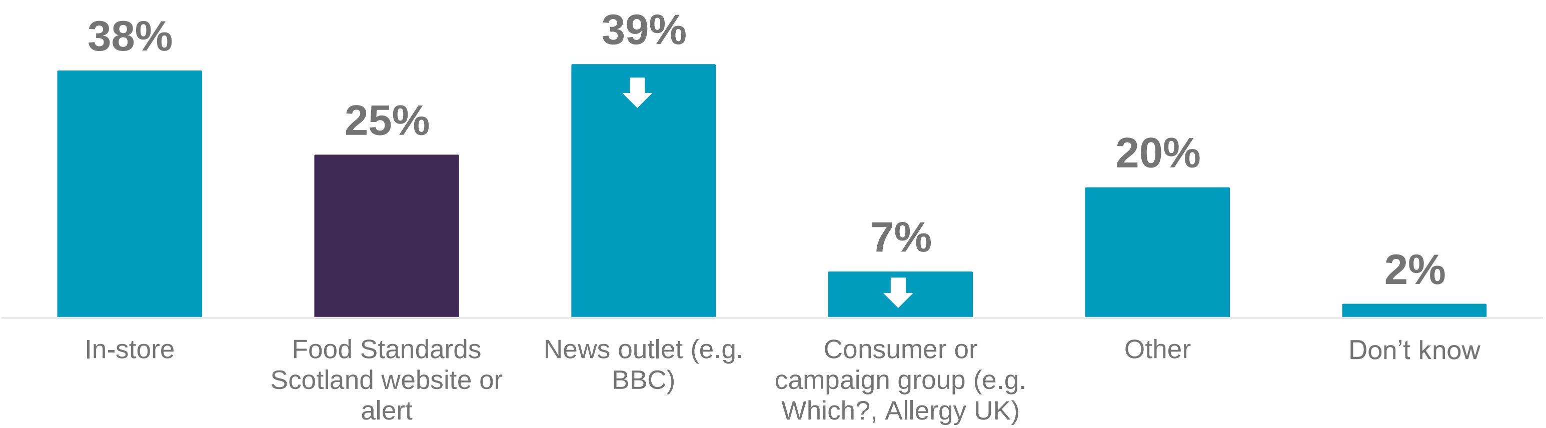
Those with food allergies in household more likely to: disbelieve that all who say they have an allergy really do (41%) and believe food intolerances are a myth (30%)

Q53 To what extent do you agree or disagree with the following statements about food allergies? Base: All respondents W11 1016, W12 1009

A quarter of consumers saw a food recall alert in the past year, consistent with previous years. Most became aware of these in-store or via news outlets. A fifth were aware of the text alert system although just 1 in 10 have signed up.

Remember any alerts about food recall





21% are aware of text alert system to notify consumers of products being recalled

9% have signed up

Those with food allergies in household (27%) and those with kids (18%) were more likely to have signed up for the text alert system

Food Standards Scotland

Q54 Do you recall any news or social media alerts about any foods being recalled from sale in the past 12 months? Base: W12 1009
Q55 To the best of your knowledge, where did you see the recall? Base : 258 (those who remembered an alert)
Q56 Are you aware that there is a text alert system to notify consumers of products which are being recalled? Base: W12 1009

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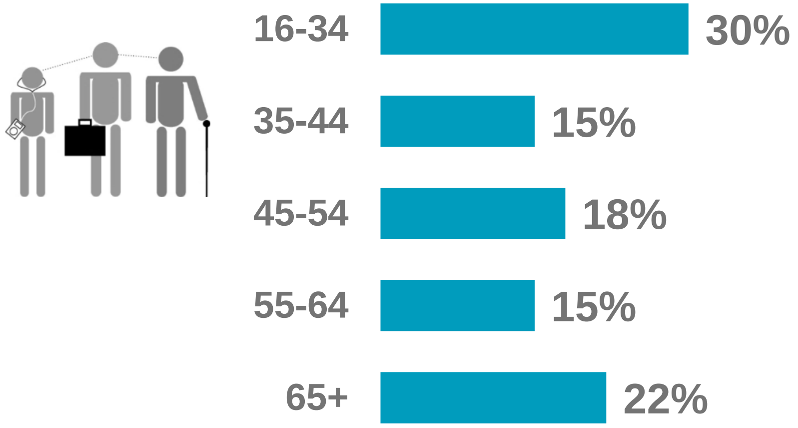
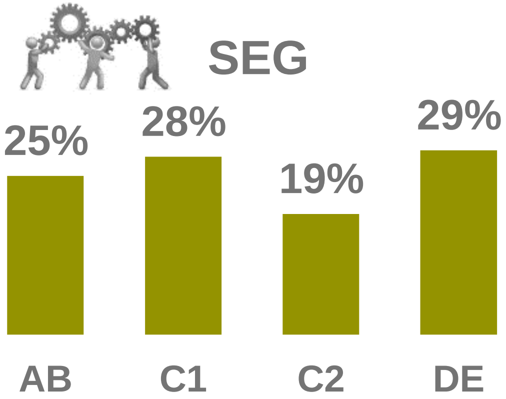
Sample representative of Scottish population – data weighted on key demographics to match previous waves.

Gender

Age



SEG

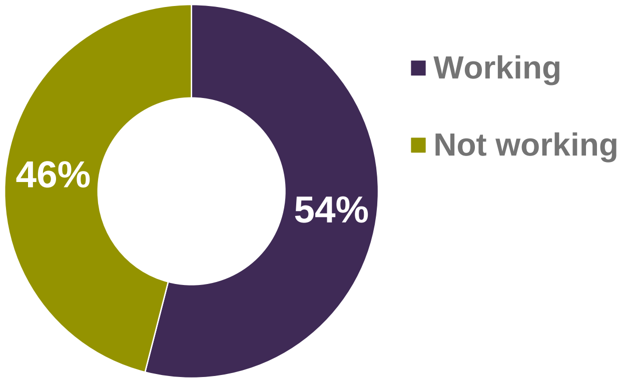


Location

North 26%
Central 68%
South 6%

Sample Profile

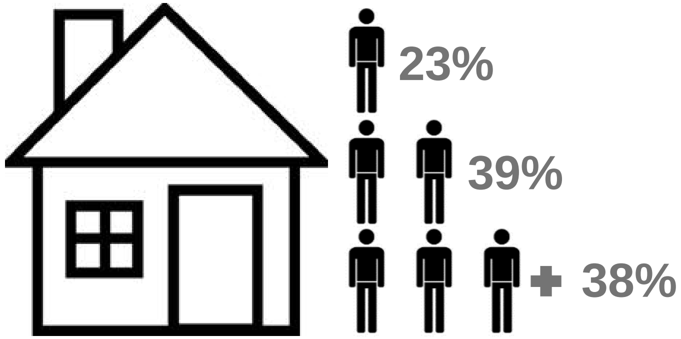
Working status



Ethnic Group

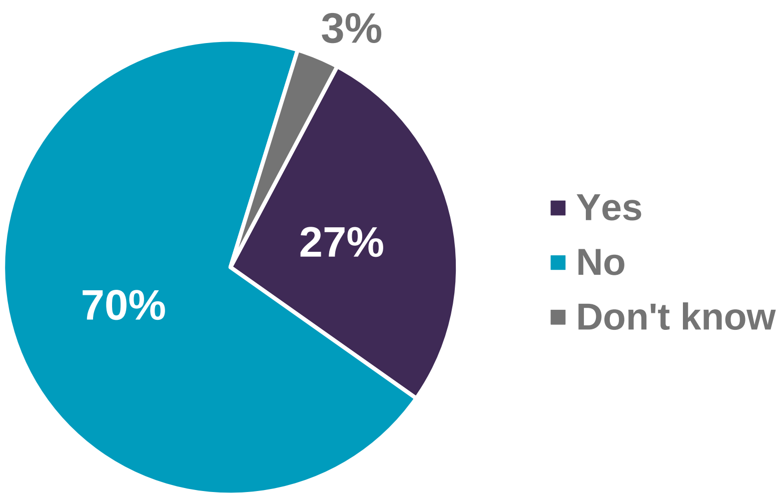
Net: White	**95%**
Net: Mixed or Multiple Ethnic Groups	2%
Net: Asian, Asian Scottish or Asian British	1%
Net: African	1%
Net: Caribbean or Black	0%
Net: Other ethnic group	0%
Would prefer not to say	1%

Household composition



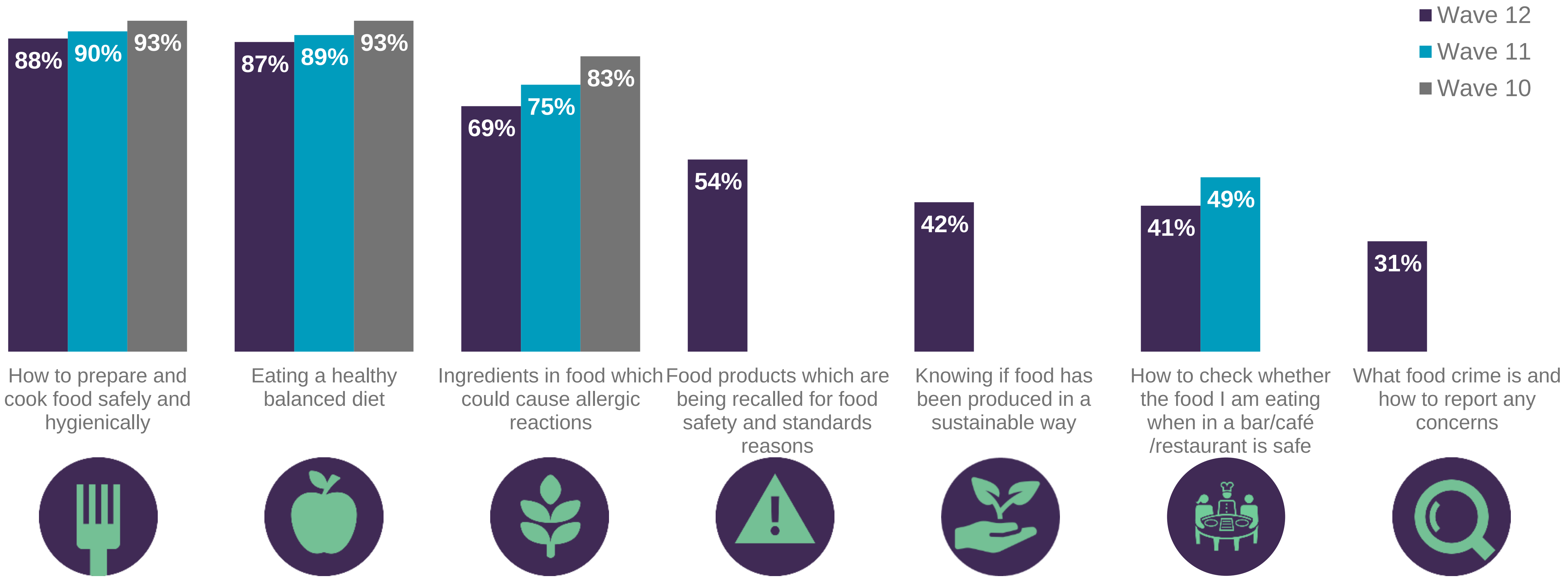
29% with children/pregnant

Health issues



Base: All respondents W12 1009

Consumers feel they have clear information on healthy eating and food safety at home. Sustainable food production, food crime and food safety when eating out of home are areas where more information could be beneficial.



Food Standards Scotland

Q14 Do you have clear information on...? Base: All respondents W10 (1015), Q11 (1016), W12 (1009)

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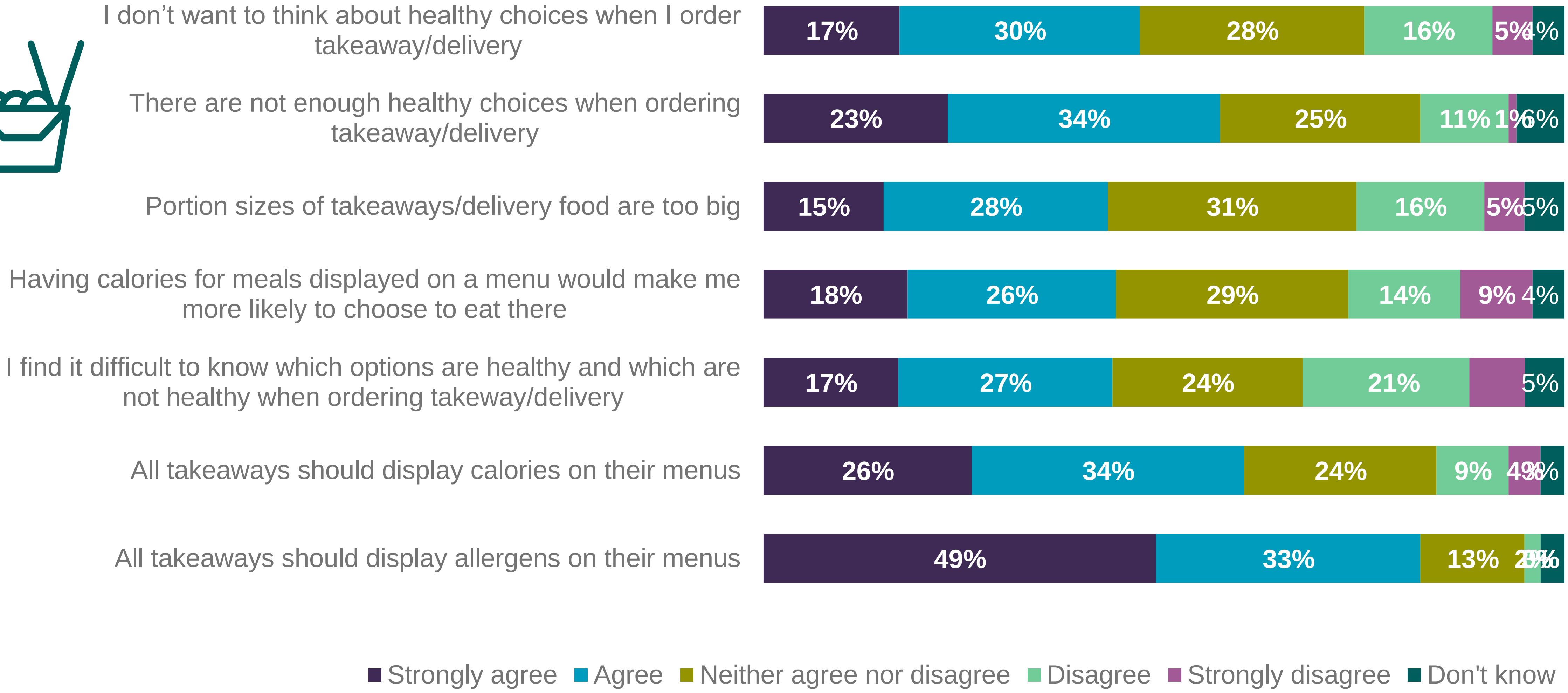
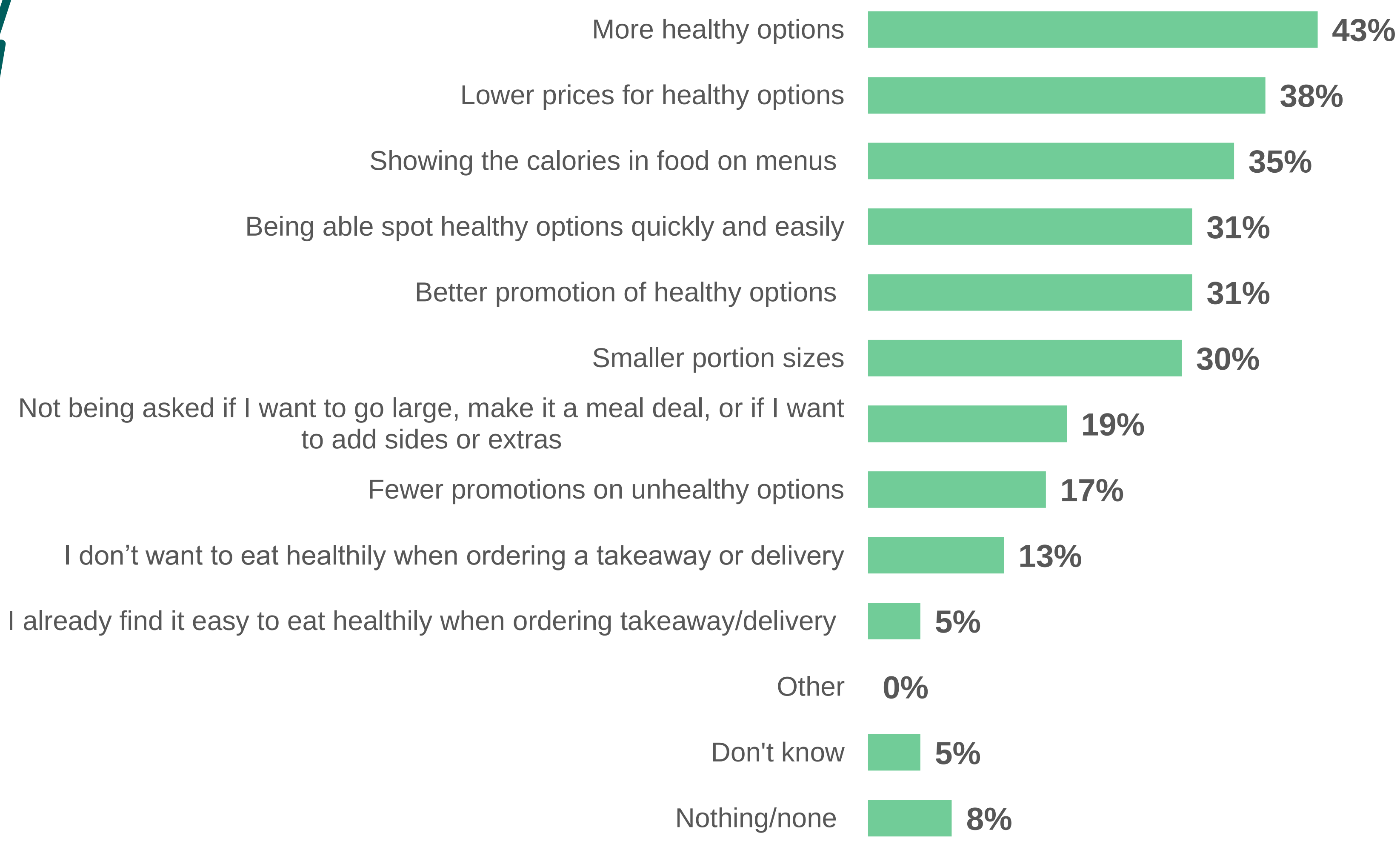
Takeaway/Delivery Statements



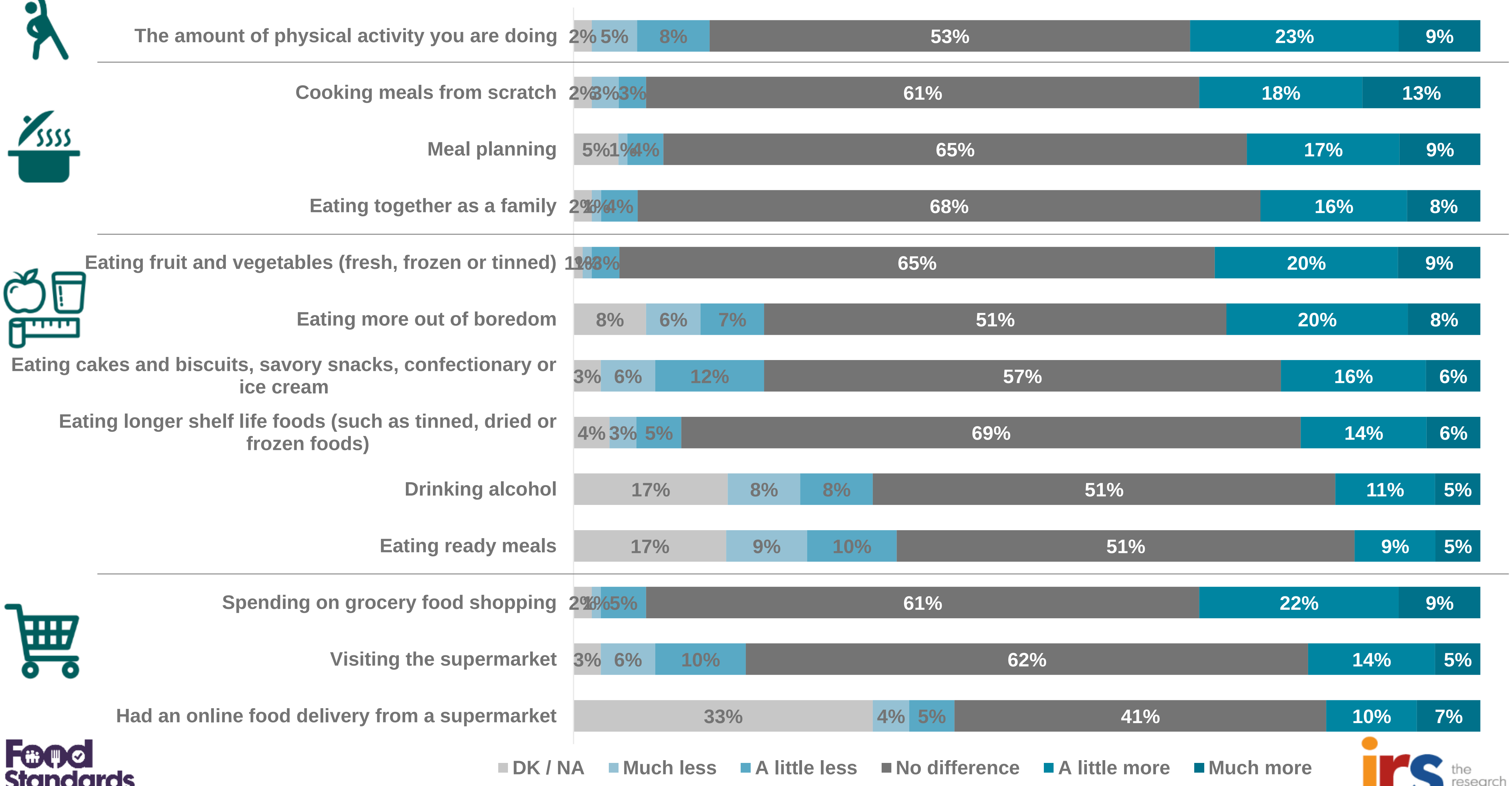
Q28 How much do you agree or disagree with the following statements? Base: W12 1009

Options for making it easier to eat healthily when ordering takeaway / delivery food



Q29 Which, if any, of the following would make it easier for you to eat healthily when ordering a takeaway or delivery? Base: W12 1009

All Covid-19 Behaviours



Q57 Compared to last month, to what extent, if at all, are you doing more or less of the following? Base W12 1009 *776