# **Eating Well Choosing Better Northern Ireland Tracking Research**

May 2019: Wave 4

## **Background**

The FSA proposal for dietary health in Northern Ireland is to:

* Align and collaborate with PHE on food product improvement and the joint ambition to remove 20% of sugar from foods typically consumed by children in NI by 2020
* To lead on food product improvement with small/medium sized enterprises (SMEs)
* To set the direction for the Eating Well Choosing Better Programme in NI at departmental level and lead key stakeholders to deliver on the outcomes
* To empower, educate & inform consumers to make healthier choices the easier choices through a planned programme of intervention

The approach for the Eating Well Choosing Better Programme will be in line with the three identified PHE priorities for sugar reduction (reduction in sugar content per 100g of product, reduction in portion size, shift in product portfolio towards lower sugar varieties).

Communications supporting this commenced in Feb-March 2018 and Jan-March 2019.

**Objectives**

To measure success of the FSA Eating Well Choosing Better Programme through robust consumer insights and monitor how these change over time with manufacturing and campaign impact:

* Understanding / knowledge of daily recommended calorie in take
* Are consumers in favour of manufacturers reducing sugar and / or saturated fat and / or salt content of foods?
* Do consumers look at front of pack traffic light labels?
* Do consumers look for sugar on packaged food labels?
* Do they look for calories on packaged food labels?
* Does this influence consumers’ choice? If so how?
* Do consumers look for / would they like to see /have they used calories on menus when eating out?
* Would they like to see High Fat Sugar Salt snacks having a maximum number of calories?

**Approach**

2CV / Community Research carried out a 10 minute online survey to measure success of the FSA food product improvement through robust consumer insights and monitor how these change over time with manufacturing and campaign impact.

A four to five year project with consumer insights gathered twice a year.

A nationally representative sample of c.300 people per wave in Northern Ireland.

Nationally representative quotas set in terms of gender, age and SEG.

**Timings**

• Wave 1: November 2017 (Pre-campaign, February 2018 campaign launches)

• Wave 2: May 2018 (Post-campaign)

• Wave 3: November 2018

• Wave 4: May 2019

• Wave 5: November 2019

• Wave 6: May 2020

• Wave 7: November 2020

• Wave 8: May 2021

• Wave 9: November 2021

• Wave 10: May 2022

• Wave 11: November 2022

**Findings**

Healthy eating understanding and behaviours

Whilst understanding of what is ‘healthier’ remains stable, seeking healthier options sees a directional decrease compared to this time last year.

* 83% understand what is ‘healthier’ (7-10 on a 10 point scale)
* 52% actively seek out healthier options when shopping (7-10 on a 10 point scale)
* 36% actively seek out healthier options when eating out (7-10 on a 10 point scale)

Consumers claim to understand what is healthier, but fewer are actively seeking out these healthier options when shopping / eating out suggesting there is a role for making these healthier options more appealing rather than re-educating.

Spontaneous perceptions of healthy eating

Calories are not top of mind when thinking about healthy eating: concerns are primarily around a balanced diet, with plenty of veg (and increasingly, less meat).

What does healthy eating mean to you? Quotes from respondents:

*“A balanced diet of meat and 5 veg”*

*“Consume a good cross section of foods required for healthy living”*

*“Eating foods that are good for me, less sugars, salt and carbohydrates”*

*“Eating good food which is low in fat, low in sugar, and low in salt, also eating fresh vegetables and fruit daily”*

*“Lots of fruit and vegetables, not too much meat, full fat milk, butter and simple meals”*

*“Moderation, fruit and vegetables less meat portion control lots of water”*

*“Plant based whole foods”*

A balanced diet with concerns over certain macronutrients remains top of mind rather than calories.

Spontaneous knowledge of traffic light labels

Understanding of traffic light labelling sees an increase in this wave, after remaining stable during 2017-18.

72% understand traffic light labels (7-10 on a 10 point scale)

Most understand that the traffic lights are intended to help guide food choice, but specific understanding is mixed. Respondent quotes:

*“A quick guide to say how healthy the item is for you. Green is okay, red is not good and should be used in moderation”*

*“If traffic light is green then the ingredients in it is within the government guidelines, but if it is red then the ingredients is well out of your recommended daily allowance”*

*“To let you know how much sugar or salt or fat is in the food”*

*“How much fat carbs etc is in food”*

*“How many calories sugar etc compared to daily recommendation”*

*“How unhealthy a food may be with red indicating an increased risk in physical health problems if regularly consumed”*

*“Good average and bad readings for the chemicals they put into food”*

*“Warnings of elements which, if exceeded on a frequent basis, can damage your health”*

With continued exposure to the traffic light labelling understanding is gradually trending up but still remains an opportunity to educate about the specific meanings of the image.

Prompted awareness (image shown) and usage of traffic light labels

Encouragingly, both recognition and use of the traffic light labels continues to trend upwards.

• 96% recognise traffic light labels

• 67% use traffic light labels when shopping

• 56% buy products with ‘healthier’ traffic light colours

• 42% buy products with a lower percentage of calorie RDA

Although consumers increasingly claim to purchase products with healthier traffic light colours, the lower calorie products haven’t seen the same increase, suggesting there is an opportunity to link the two in consumers’ minds.

Shopping behaviour around healthy eating (1)

As with previous waves, sugar remains the most consulted nutrient of traffic light labelling and sees a directional increase in this wave.

For themselves:

• 50% look at traffic light labels for sugar

• 40% look at traffic light labels for calories

• 43% look at traffic light labels for salt

• 40% look at traffic light labels for fat

• 35% look at traffic light labels for saturated fat

Consultation of the traffic light labelling for calories, fat, saturates and salt remains notably behind sugar. There is an opportunity here to educate around the importance of calories and the other nutrients.

Shopping behaviour around healthy eating (2)

Sugar and Salt are key nutrients both parents and grandparents consult when looking at traffic light labels.

For their children (based on those with children, n=89):

• 57% look at traffic light labels for sugar

• 33% look at traffic light labels for calories

• 57% look at traffic light labels for salt

• 49% look at traffic light labels for fat

• 38% look at traffic light labels for saturated fat

For their grandchildren (based on those with grandchildren, n=62):

• 58% look at traffic light labels for sugar

• 30% look at traffic light labels for calories

• 46% look at traffic light labels for salt

• 38% look at traffic light labels for fat

• 32% look at traffic light labels for saturated fat

Understanding of calorie intake by gender

Understanding of recommended calorie intake sees a significant increase amongst men but remains stable amongst women.

• 43% of women think their recommended daily average allowance of calories is 2000 (32% said they don’t know)

• 36% of men think their recommended daily average allowance of calories is 2500 (37% said they don’t know).

Despite this strong increase in knowledge of the correct calorie RDA amongst men, women remain much more likely to know their recommended intake and so there is an opportunity to increase targeting towards men.

Attitudes towards healthier foods

Whilst sugar, fat and salt remain key concerns for consumers, there remains a greater appetite for reducing these ingredients rather than smaller portions.

More likely to buy compared to a regular version of the product:

• 67% reduced salt

• 67% reduced sugar

• 63% reduced fat

• 49% max limit on calories for foods high in fat, sugar or salt

• 47% smaller portion sizes of sugary meals / snacks

• 45% smaller portion sizes of snacks / meals higher in saturated fat

• 43% smaller portion sizes of snacks / meals higher in salt

Proportion who would like to see more:

• Reduced sugar: 61%

• Reduced salt: 57%

• Reduced fat: 51%

• Max calorie limit: 30%

• Smaller portions of sugary food: 24%

• Smaller portions of foods higher in saturated fat: 22%

• Smaller portions of foods higher in salt: 19%

Healthy eating when eating out

It is slightly less difficult to choose healthier options in many places: fast food restaurants, vending machines, and work canteens see directional improvements.

‘Difficult’ or ‘very difficult’ to choose healthier food and meals (5 point scale of very easy to very difficult:

• Takeaway: 67%

• Fast food restaurant: 57%

• Vending machine: 54%

• Restaurant: 52%

• Café / sandwich shop: 47%

• Small corner shop: 42%

• Work canteen: 27%

• Meals at home: 11%

• Supermarket: 9%

Appetite for more healthier projects in / at:

• Takeaways: 53%

• Fast food restaurants: 50%

• Restaurants: 52%

• Cafés / sandwich shops: 39%

• Vending machines: 40%

• Supermarkets: 38%

• Small corner shops: 30%

• Work canteens: 20%

Awareness of communication about calories

Awareness and recognition of the campaign remains comparable versus last wave.

* 18% were spontaneously aware of calories communications
* 33% said they the communications they saw were from the government

Respondent quotes:

*“How cereals may seem very healthy however contain lots of sugars”*

*“Reduced sugar in fizzy drinks”*

*“Link between waist size and increased cancer risk”*

*“On tv advertising the danger of high carbs and sugar and saturated fat, high cholesterol”*

*“Sugar, carbs and fatty foods causing type 2 diabetes and heart disease”*

When prompted with images, 12% recognised “Know Your Calories” communication

Although the additional campaign burst will have helped with some awareness and recognition, increased spend will be needed to sustain or increase these levels.

Key Take-Outs: Wave 4, May 2019

1. Building awareness

* Awareness of calorie communications (both spontaneous and prompted) is stable versus previous waves and remains low overall
* Recognition of the traffic light labelling remains strong and sees a directional increase in this wave
* Continued campaign activity which is more targeted will be necessary in order to maintain or build on awareness and recall of the campaign.

2. Building understanding

* Knowledge of the calorie RDA for men has significantly increased, but not for women
* Understanding of what is ‘healthier’ reaches a new all time high
* Awareness and understanding of traffic light labels continues to gradually increase
* Men still are less likely to know their calorie RDA, so an opportunity to increase message targeting amongst men.

3. Changing behaviour

* While likelihood of buying ‘healthier’ alternatives to regular products increases, this is not seen for lower calorie products
* Use of traffic light labels is directionally up, and sugar remains the biggest concern for consumers using the traffic light images
* Opportunity to increase importance of message for calories in traffic light labels or other comms.

Next Steps: Wave 5 to follow in November 2019.