

# Product Reformulation

Understanding Scottish Consumer Attitudes

May 2020

# Understanding reformulation



**Levercliff**  
Category Consultants to  
the Food & Drink Industry

Levercliff conducted this research on behalf of Food and Drink Federation Scotland in early 2020.

The study took place during the Covid-19 crisis, but fieldwork was unaffected as was conducted online.

Levercliff believes that Covid-19 will impact overall purchasing habits and perceptions of health going forward. Conducting the study in this period will help companies better understand consumer attitudes towards reformulation now and beyond lockdown.

# This Research has 2 Key Objectives

1. To understand consumer attitudes towards & demand for healthier food products.
2. To understand consumer attitudes towards reformulating or reducing portion sizes to make food healthier.

# This report is split into 2 main sections

## Section 1

Consumer Behaviour, Attitudes and Demand  
for Healthier Food

## Section 2

Consumer Awareness & Perceptions.  
Initiatives and attempts to make existing food  
products healthier.

# Each section considers sub sectors

- **Bakery:** Savoury (Bread) and Sweet (Cakes)
- **Butchery:** Fresh Meat, Fresh Processed Meat, Cooked Meat, Pastry Based Meat Pies, Quiche & Pasties, Meat Snacks
- **Dairy:** Cheese, Ice-Cream, Yoghurt
- **Sweet Snacking:** Confectionery, biscuits & cereal bars
- **Savouries:** Savoury snacks (crisps) and vegetarian and vegan pastry-based savouries
- **Prepared Foods:** Ready Meals and Pizza

# Why should businesses reformulate?



# Why Should Businesses Reformulate Their Products?

**Health & Wellbeing**  
**Rise of Lifestyle Diseases**

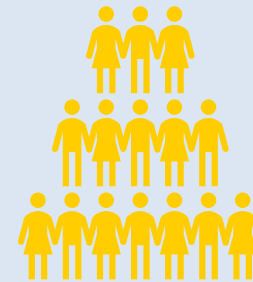
**One fifth** of all adults  
worldwide will be  
**obese by 2025**

Consumer concerns about  
**Sugar and Salt** quantities  
in food in particular

**69% of Consumers think**  
**Food Manufactures have**  
**a responsibility** to make  
unhealthy food healthy



Quantitative survey  
using an online  
consumer panel



Sample Size

**587**

Across a **representative sample** of Scottish adults

Fieldwork was completed in April 2020



# Profile of Respondents

## Gender

Female 48%

Male 52%

## Age

18-44 - 39%

45-64 - 37%

65+ - 23%

## Children Living at Home

Yes 33%

No – 77%

## Social Grade

ABC1 - 55%

C2DE - 45%

## Region

Aberdeen City – 4%

Aberdeenshire – 4%

Angus – 2%

Argyll and Bute – 1%

City of Edinburgh – 10%

Clackmannanshire – 1%

Dumfries and Galloway – 3%

Dundee City – 4%

East Ayrshire – 3%

East Dunbartonshire – 2%

East Lothian – 1%

East Renfrewshire – 1%

Falkirk – 3%

Fife – 7%

Glasgow City – 13%

Highland – 3%

Inverclyde – 1%

Midlothian – 4%

North Ayrshire – 2%

North Lanarkshire – 5%

Perth and Kinross – 3%

Renfrewshire – 4%

Scottish Borders – 3%

South Ayrshire – 3%

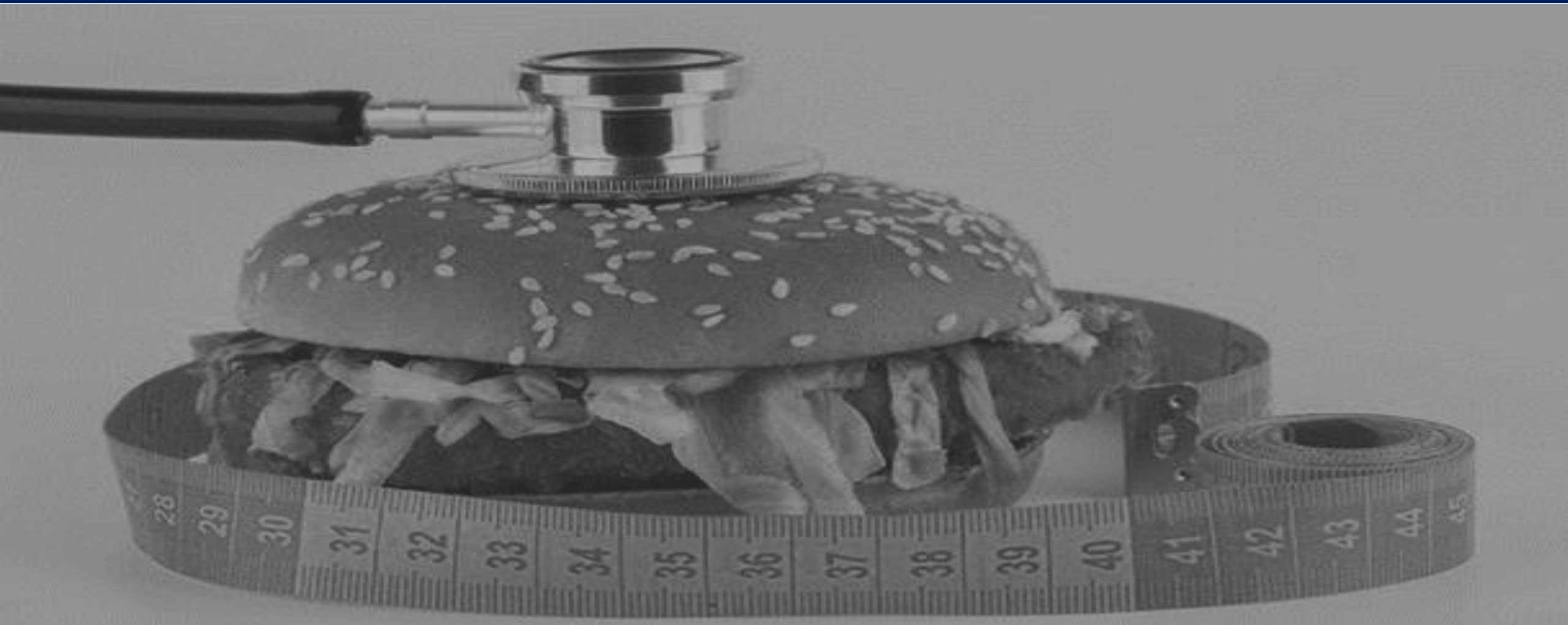
South Lanarkshire – 6%

Stirling – 1%

West Dunbartonshire – 2%

West Lothian – 4%

# SUMMARY

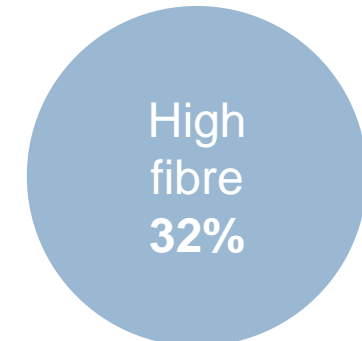
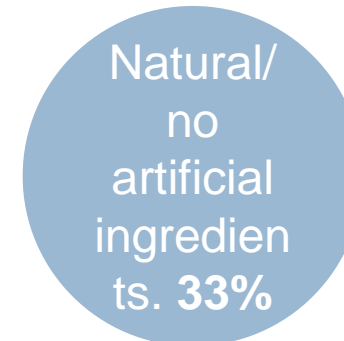
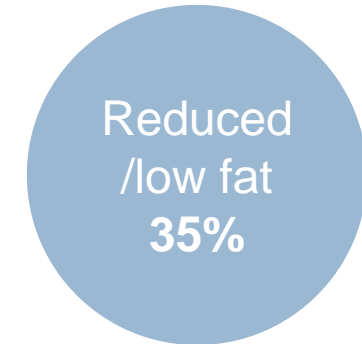
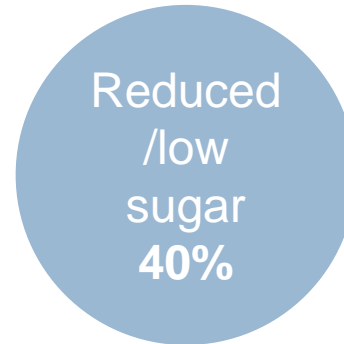


# Scottish Adults Want Healthy Diets

## Top 2 Health Goals



## Food & Drink Products Actively Looked For/Purchased



# There is a disconnect between intentions & reality

Only 22% of adults and 15% of children are eating enough **fruit & vegetables**

Two-thirds of the population had a daily intake of **salt** higher than the recommended 6g per day

On average adults in Scotland consume 14.1% of their daily energy intake from **sugar**, significantly more than the recommended 5%

In 2017, 65% of Scottish adults aged 16 and over were **overweight or obese**

- The majority of Scottish consumers are not eating according to dietary guidelines.
- There is undoubtedly a role for reformulation to help Scottish people achieve their goals.

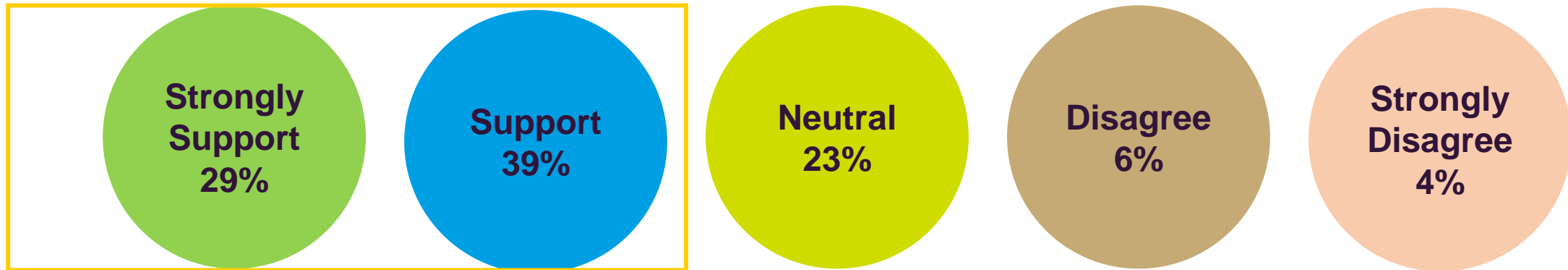
# Awareness of Diet is a Key Issue

	Salt	Sugar	Fat	Calories
Less than guidelines	30%	35%	24%	14%
Equal to guidelines	44%	32%	47%	50%
More than guidelines	17%	26%	20%	26%
Don't know	9%	7%	9%	10%

- Scottish adults think what they are eating means their diet is within (or better than) guidelines.

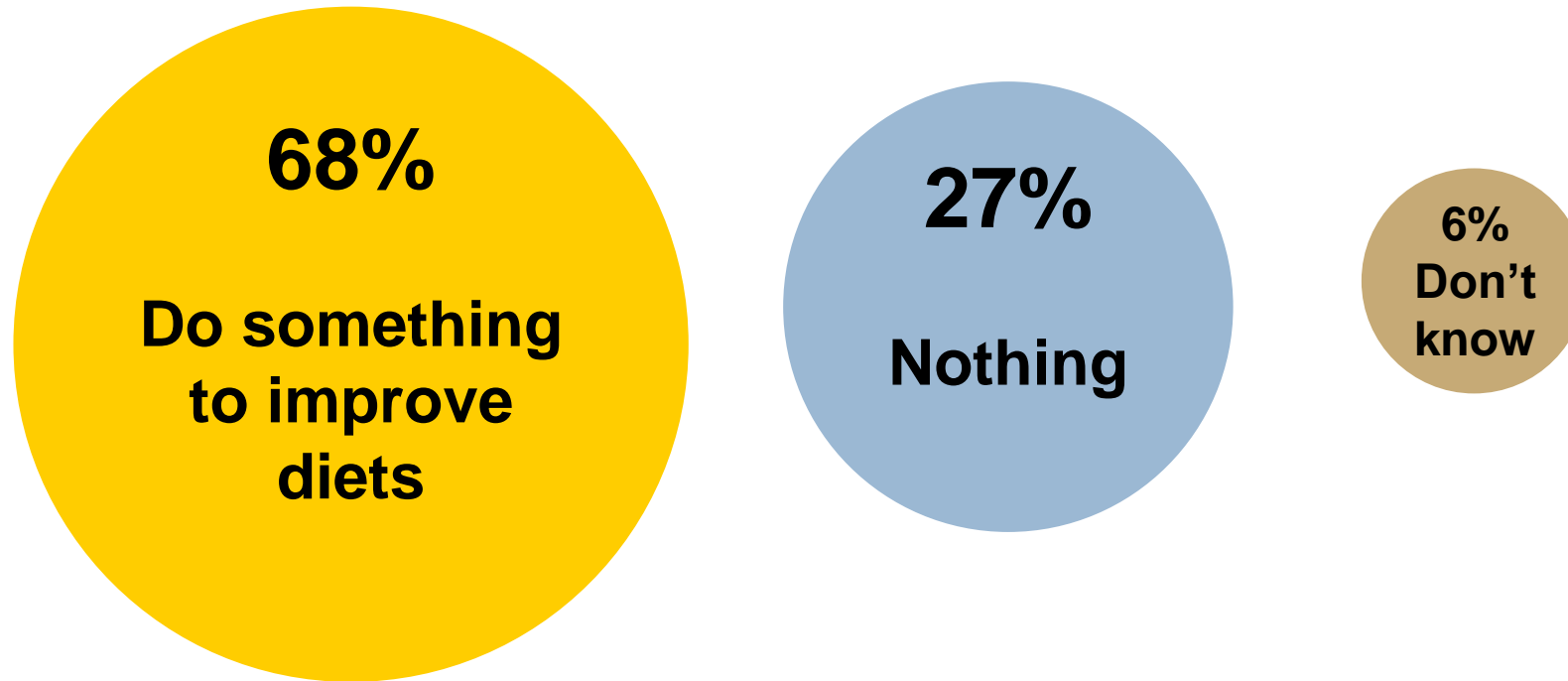
# Perceptions of Scottish Government's Reformulation Initiative

The Scottish Government is asking food businesses to make packaged or processed foods healthier by **reducing the amount of salt, sugar, fat and calories** and where relevant **increasing the amount of fibre or fruits & vegetables** contained within them. This may include small changes to the recipe of products (reformulation) or reducing portion sizes.



- Most Scottish adults support the Scottish Government's reformulation initiative.

# A Role for Food Companies/Brands?



- The majority of Scottish adults feel food companies/brands should be doing something to help make people's diets healthier.

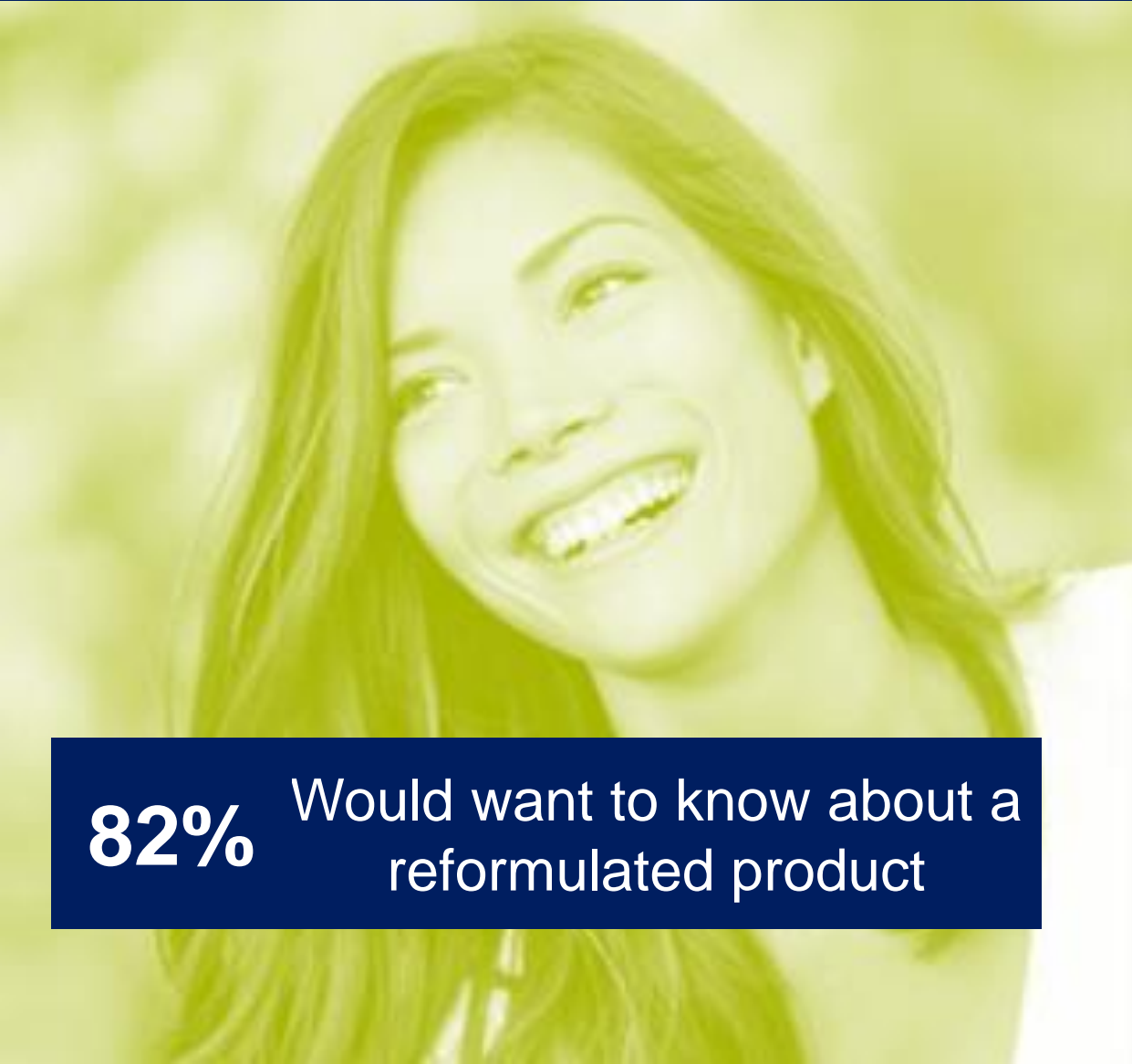
# What should food companies/brands should be doing to help make people's diets healthier?

- Reformulation is overwhelmingly preferred compared to reducing portion sizes, which is seen as benefiting businesses more than the consumer (reduced size for same price).
- There may also be a role for new products to provide consumer choice.





# Consumers Want to Know if Products are Reformulated



**82%** Would want to know about a reformulated product



**9%** Would NOT want to know about a reformulated product

# Perceptions of Company if Reformulated

	I would think more positively of the company	My perceptions of the company/brand wouldn't change
Vegetarian & vegan pastry-based savouries	44%	38%
Prepared meals & pizza	43%	35%
Savoury snacks	41%	35%
Biscuits & cereal bars	39%	36%
Confectionery	39%	34%
Cooked meat	39%	39%
Savoury bakery	38%	38%
Fresh processed meat	38%	39%
Sweet bakery	37%	35%
Yoghurt	36%	41%
Pastry based meat pies, quiches & pasties	36%	40%
Meat snacks	36%	38%
Ice-cream	35%	39%
Cheese	34%	39%
Fresh meat (raw)	31%	44%

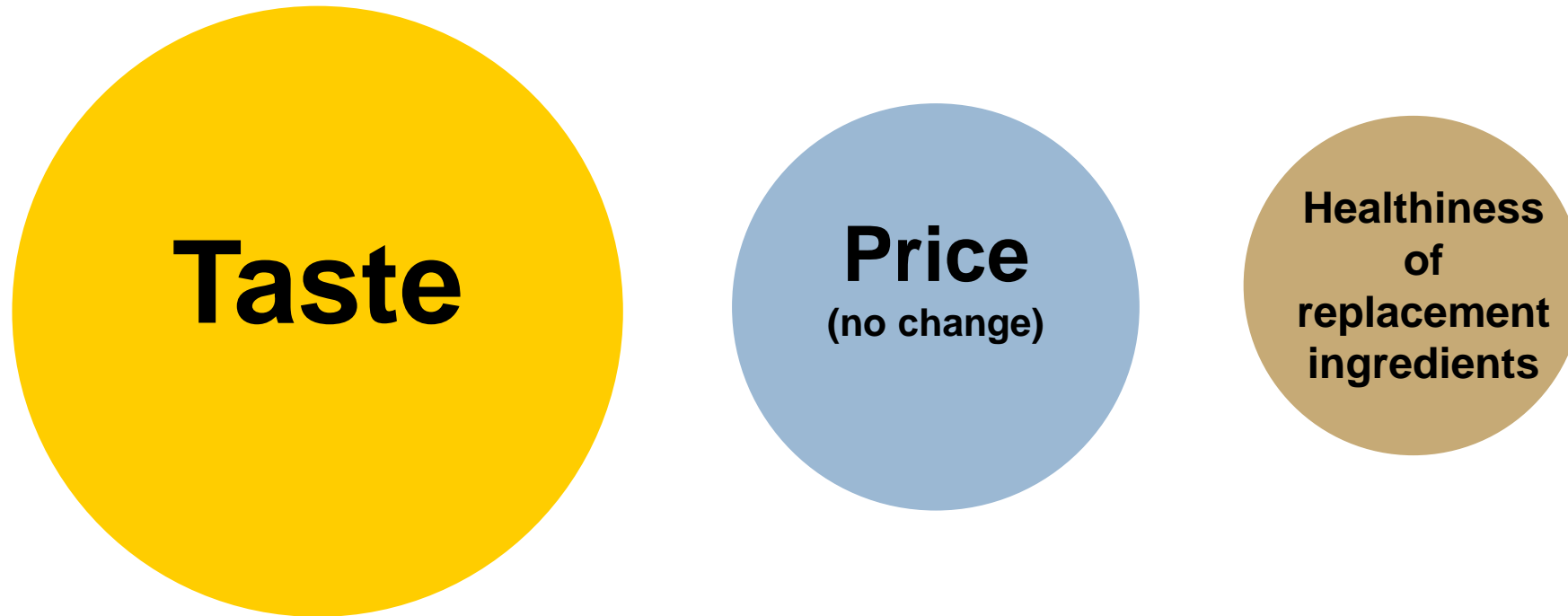
- If managed well, reformulation may positively impact buyers' perceptions of a brand.

# Impact on Sales if Reformulated

	I would be likely to buy more	I would be likely to buy less	I would buy the same amount	Don't know/it would depend	Balance More/Less
Vegetarian & vegan pastry-based savouries	27%	8%	50%	15%	19%
Prepared meals & pizza	19%	10%	53%	18%	9%
Yoghurt	17%	7%	61%	15%	10%
Biscuits & cereal bars	17%	12%	55%	16%	5%
savoury snacks	17%	11%	56%	16%	6%
Ice-cream	16%	11%	55%	18%	5%
Confectionery	16%	14%	53%	17%	2%
Savoury bakery	14%	11%	59%	16%	3%
Sweet bakery	14%	15%	54%	17%	-1%
Cooked meat	14%	8%	62%	16%	6%
Pastry based meat pies, quiches & pasties	14%	11%	58%	17%	3%
Cheese	14%	9%	62%	16%	5%
Fresh meat (raw)	13%	7%	64%	15%	6%
Fresh processed meat (raw)	13%	7%	62%	18%	6%
Meat snacks	13%	11%	56%	19%	2%

- Similarly, for most categories there may be an incremental positive impact on sales for a company that reformulates well.

# What will Consumers Judge Reformulation On?



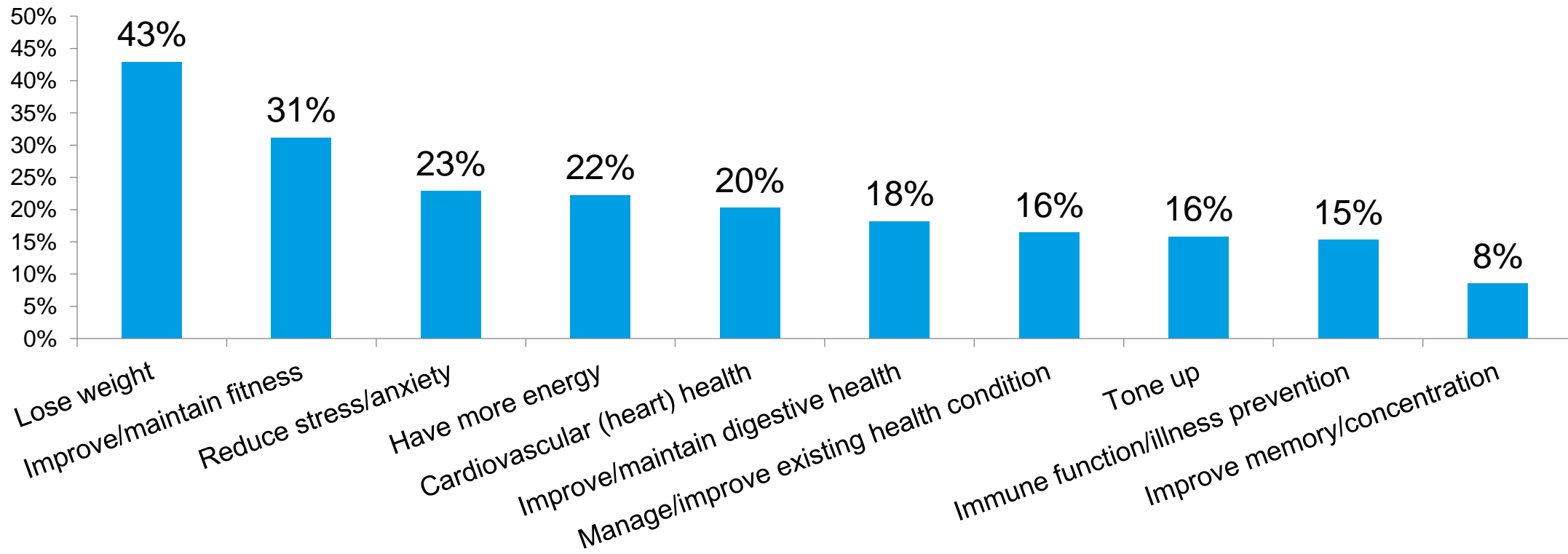
- Across all categories taste was the single greatest factor determining whether consumers would continue to buy the product after reformulation.
- Suggesting that changes either need to be gradual so any changes in taste are less detectable or thoroughly tested before implementation.



# SECTION 1 – Consumer Behaviour, Attitudes and Demand for Healthier Food

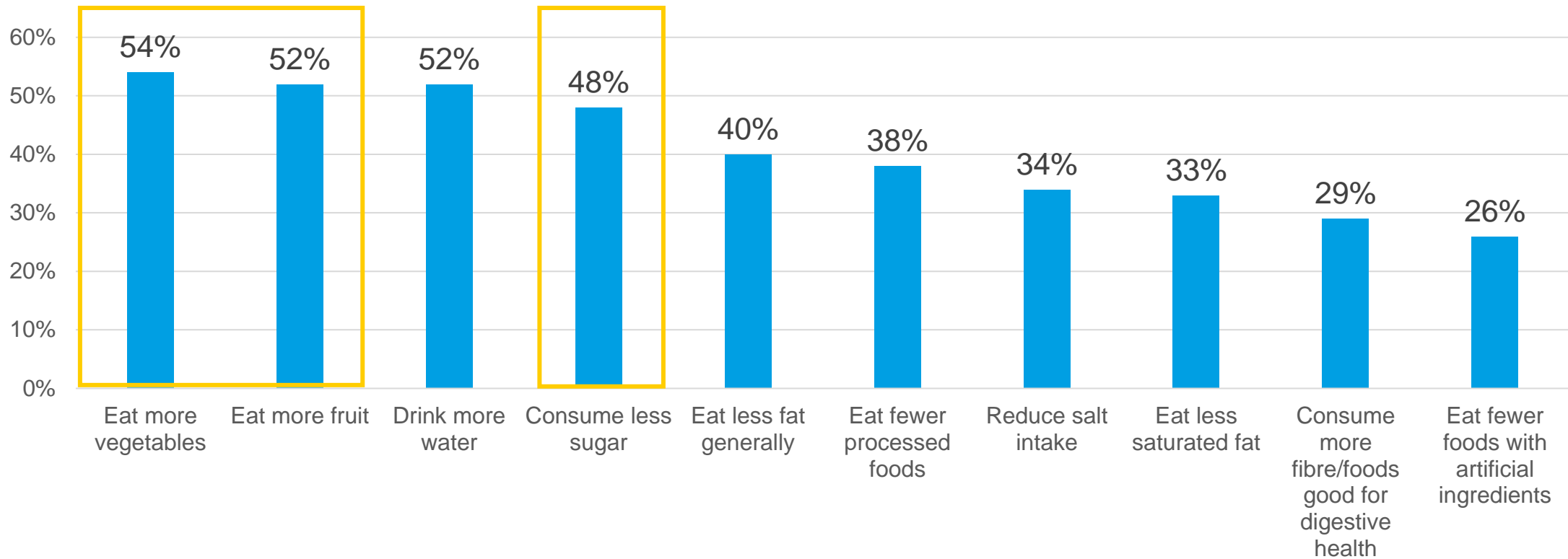


# Top 10 Health Goals



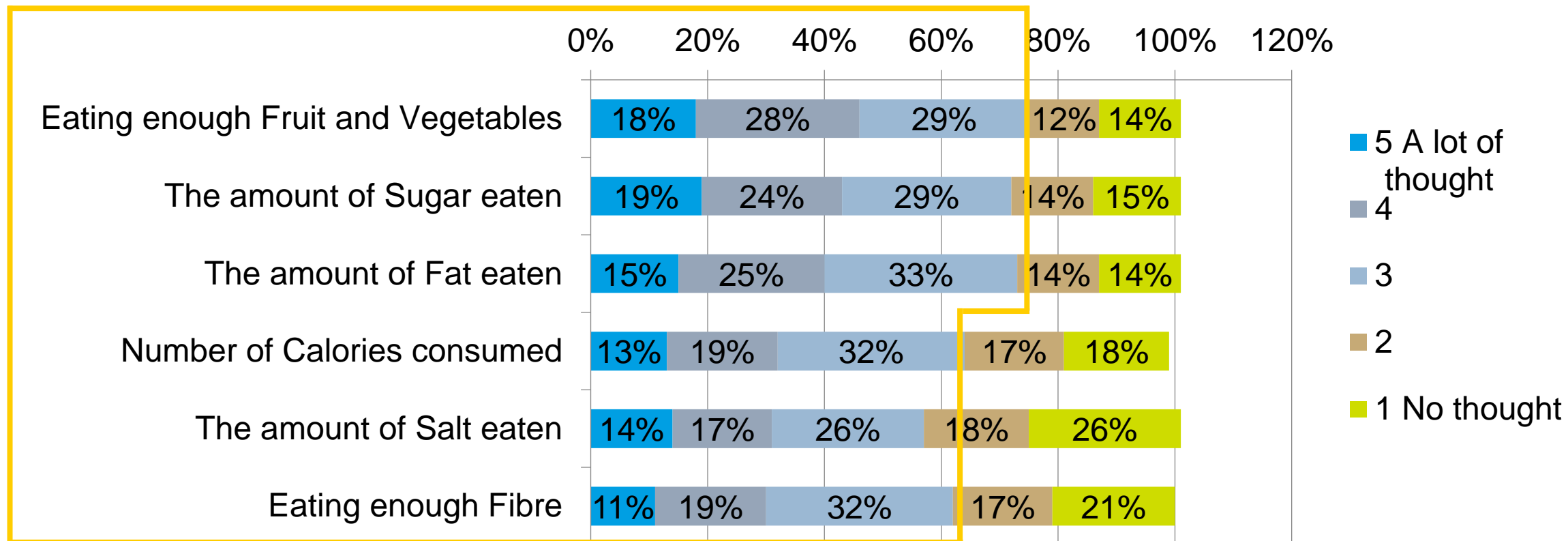
- Most Scottish adults have some sort of health goal, only 11% do not.
- Losing weight and improving/maintaining fitness are the top 2 health goals.

# Top 10 Ways Trying to Eat/Drink More Healthily



- Most Scottish adults are trying to do something to eat more healthily.
- Eating more fruit & vegetables and consuming less sugar are most strived for.

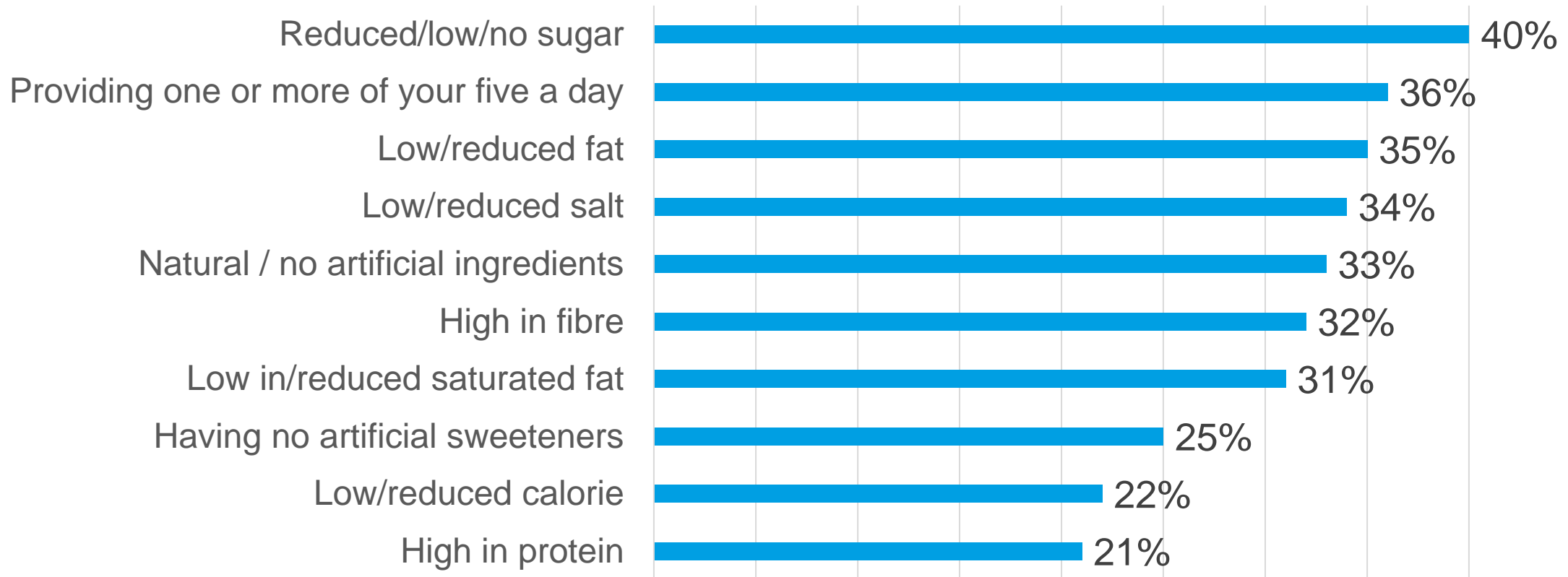
# Thought Given to the Following on a Daily Basis



- Few respondents are giving **no** thought to the amount they are eating of these foods or nutrients.



# Top 10, Types of Food & Drink Products Actively Looked For/Purchased



- A significant proportion are actively looking for food & drink products to support their goals.

# Types of Food & Drink Products Actively Looked For/Purchased

	Gender			Age			Social Grade			
	Total	Male	Female	18 - 34	35 - 54	55+	AB	C1	C2	DE
Reduced/low/no sugar	40%	39%	41%	32%	37%	47%	41%	38%	40%	41%
Providing one or more of your five a day	36%	33%	39%	29%	34%	41%	42%	36%	34%	30%
Low/reduced fat	35%	35%	36%	26%	34%	41%	34%	36%	39%	32%
Low/reduced salt	34%	33%	36%	24%	30%	43%	39%	34%	30%	34%
Natural / no artificial ingredients	33%	29%	38%	32%	29%	38%	38%	35%	31%	28%
High in fibre	32%	31%	34%	27%	30%	37%	35%	33%	32%	29%
Low in/reduced saturated fat	31%	28%	34%	25%	29%	35%	33%	32%	27%	31%
Having no artificial sweeteners	25%	22%	28%	25%	21%	27%	24%	23%	23%	30%
Low/reduced calorie	22%	19%	25%	19%	27%	20%	21%	25%	22%	21%
High in protein	21%	20%	22%	29%	23%	15%	19%	21%	21%	23%
Supporting heart health (e.g. help reduce cholesterol)	19%	20%	19%	13%	14%	26%	19%	19%	23%	18%

- Older adults in particular are looking for a greater range of products to actively support healthy eating.

# Changes in Amounts Purchased vs. a Few Years Ago, Selected Categories

	Confectionery	Ready Meals	Savoury Snacks	Sweet Bakery	Pastry Based Meat Pies
More	21%	17%	20%	19%	12%
Less	14%	16%	14%	21%	20%
The same	65%	67%	66%	61%	67%
Balance	+7%	+1%	+6%	-2%	-8%

- For most categories the amount purchased remains unaltered significantly.

Thinking about each of these types of food you buy, are you buying more, less or about the same than you were a few years ago? Please answer based on your behaviour before the Covid-19 restrictions in the UK - Base: Mixed

# Meeting Healthy Eating Targets

Only 22% of adults and 15% of children are eating enough **fruit & vegetables**

Two-thirds of the population had a daily intake of **salt** higher than the recommended 6g per day

On average adults in Scotland consume 14.1% of their daily energy intake from **sugar**, significantly more than the recommended 5%

In 2017, 65% of Scottish adults aged 16 and over were **overweight or obese**

- The majority of Scottish consumers are not eating according to dietary guidelines.
- This highlights that there are barriers causing this disconnect between goals and reality. In addition to socio-economic factors awareness of own diet is a key issue.
- There is undoubtedly a role for reformulation to help Scottish people achieve their goals.

# Do Scottish Consumers Think They Are Eating the Right Amount of Salt, Sugar, Fat & Calories?

	Salt	Sugar	Fat	Calories
Less than guidelines	30%	35%	24%	14%
Equal to guidelines	44%	32%	47%	50%
More than guidelines	17%	26%	20%	26%
Don't know	9%	7%	9%	10%

- Most Scottish adults feel they personally are eating less than or equal to the recommended guidelines for salt, sugar, fat & calories.

# Do Scottish Consumers Think They Are Eating the Right Amount of Salt, Sugar, Fat & Calories?

**66%** of those buying confectionery and ice-cream and sweet bakery and biscuits & cereal bars at least once a week\* feel they are eating equal to or less than the dietary guidelines on sugar.

**70%** of those buying cooked meat, meat snacks, pastry based meat pies & quiches, and ready meals/pizza a least once a week\* believe they are eating equal to or less than the dietary guidelines on salt.

# Do Scottish Consumers Think They Are Eating the Right Amount of Fruit & Vegetables and Fibre?

	Fruit & Veg	Fibre
Less than guidelines	25%	17%
Equal to guidelines	41%	51%
More than guidelines	29%	20%
Don't know	9%	11%

- Similarly, the majority feel they are eating equal to or more than the recommended amount of fruit & vegetables and fibre.

# Do Parents/Guardians Think That Their Children Are Eating the Right Amounts?

	Less Than	Equal	More Than	Don't Know
Salt	29%	49%	9%	14%
Sugar	22%	44%	22%	12%
Fat	22%	52%	14%	12%
Calories	13%	60%	13%	13%
Fruit and Vegetables	22%	46%	21%	11%
Fibre	16%	57%	13%	14%

- For children too, most parents/guardians feel that their children are eating the right amounts.



# Deprivation and Diet



## **Least deprived eat:**

More fibre and fruit and veg

Less sugar and sugary drinks

But more sat fat



## **Most deprived eat:**

Less fibre and fruit and veg

More sugar and sugary drinks

But less sat fat

- Research has found that a larger proportion of the most deprived are not meeting healthy eating targets in many areas.

# Eating the Right Amounts by Social Grade

	Less than or equal to dietary guidelines			
	AB	C1	C2	DE
Salt	81%	72%	75%	69%
Sugar	70%	64%	72%	61%
Fat	77%	69%	70%	68%
Calories	66%	63%	67%	60%

	More than or equal to dietary guidelines			
	AB	C1	C2	DE
Fruit & Veg	76%	68%	67%	65%
Fibre	76%	68%	73%	67%

- Although there is a slight drop off amongst DE's, overall most adults in all sections of society feel they are eating the right levels.

**This has implications for both how reformulation may be perceived and how it should be communicated. (i.e. something to help support a healthy diet rather than improve it)**

# Attitudes to Diet – Summary

**Many Scottish adults want to or are trying to have a healthy diet.**

**There is a disconnect between goals & reality. The majority of Scottish adults are not eating according to dietary guidelines.**

**A key barrier is awareness of own diet. Most Scottish adults think that they eat according to dietary guidelines on salt, sugar, fat, calories, fruit & vegetables and fibre.**

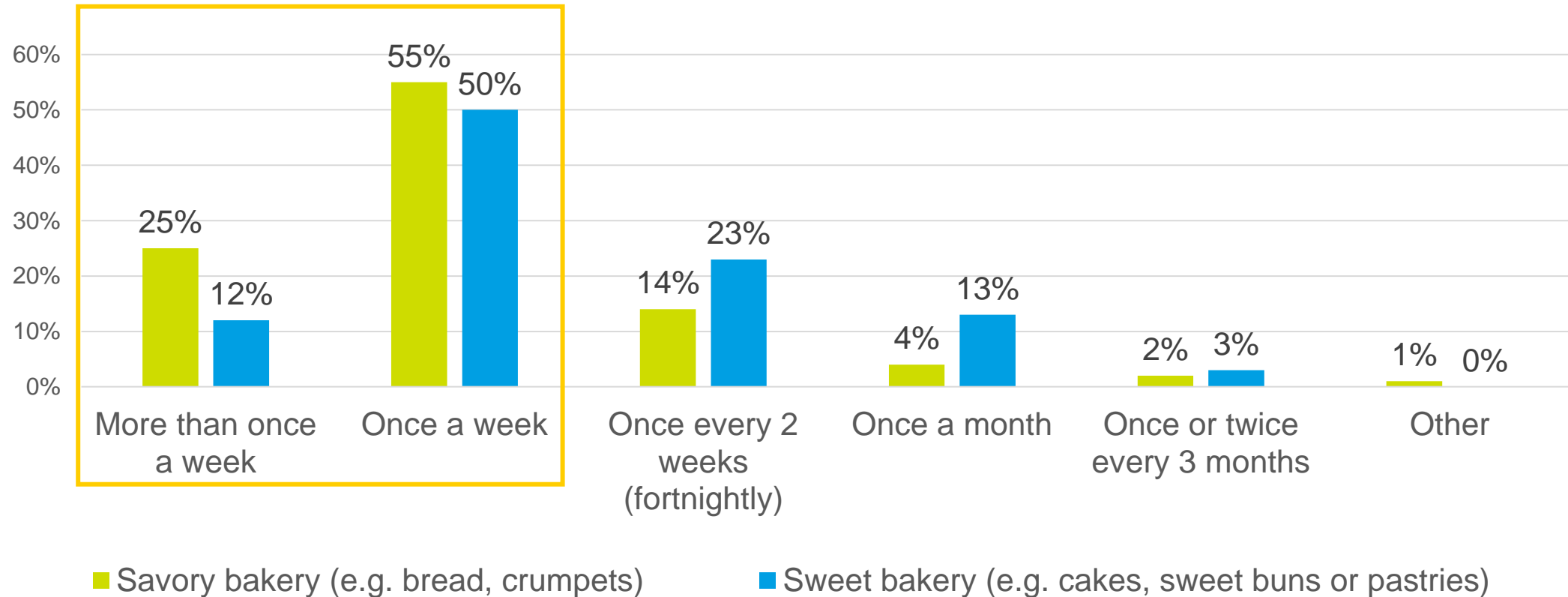
**Only a minority have made significant changes to what they eat. This supports the need for reformulation.**

# Reformulating Bakery Products



**Consumer Behaviour, Attitudes and Demand**

# Frequency of Purchase Sweet & Savoury Bakery



- Sweet & savoury bakery products are regular purchases
- The majority buying once a week

# Frequency of Purchase Sweet & Savoury Bakery

	Total	18 - 34	35 - 54	55+	Children at home <18	Children over 18	No kids	AB	C1	C2DE
Sweet Bakery										
More than once a week	12%	17%	10%	9%	15%	21%	9%	8%	9%	15%
Once a week	50%	44%	56%	48%	55%	55%	47%	47%	49%	52%
Once every 2 weeks (fortnightly)	23%	22%	19%	26%	18%	14%	26%	22%	26%	20%
Once a month	13%	13%	11%	14%	8%	10%	15%	20%	12%	9%
Once or twice every 3 months	3%	4%	3%	3%	3%	0%	4%	3%	4%	3%
Other	0%	0%	1%	0%	1%	0%	0%	0%	0%	1%
Savoury bakery										
More than once a week	25%	28%	26%	23%	32%	33%	22%	21%	22%	29%
Once a week	55%	53%	57%	54%	54%	54%	55%	55%	59%	53%
Once every 2 weeks (fortnightly)	14%	13%	11%	16%	10%	12%	15%	16%	14%	11%
Once a month	4%	4%	4%	5%	3%	0%	6%	4%	4%	5%
Once or twice every 3 months	2%	2%	2%	2%	1%	1%	2%	3%	1%	1%
Other	1%	1%	0%	1%	1%	1%	0%	1%	0%	1%

- Households with children are the most frequent buyers for both e.g. 38% of households with children aged 12-17 are buying savoury bakery more than once a week.
- C2DE households are also buying most often



# Who Sweet & Savoury Bakery Items are Purchased For?

Savoury Bakery	Children at Home Under 18	Children Over 18	No Children at Home
Myself	93%	96%	95%
Children/ Grandchildren	70%	54%	5%
Other adult/s in household	60%	63%	50%
Friends/ Family when entertaining	5%	5%	4%
As a gift/other	1%	0%	2%

Sweet bakery (e.g. cakes, sweet buns or pastries)	Children at Home Under 18	Children Over 18	No Children at Home
Myself	82%	83%	89%
Children/ Grandchildren	74%	56%	9%
Other adult/s in household	54%	62%	53%
Friends/ Family when entertaining	11%	10%	9%
As a gift/other	3%	5%	4%

- Sweet bakery items are frequently being purchased for children in the household.
- 70% of households with children aged 17 or under that are buying sweet bakery items for children, are doing so at least once a week.



# Frequency of Purchasing Sweet Bakery & Perceptions of Eating More than Guidelines on Sugar & Calories

		More than once a week	Once a week	Once every 2 weeks	Once a month
Adults	Eat more than dietary guidelines on sugar	43%	29%	28%	18%
	Eat more than dietary guidelines calories	36%	27%	29%	21%
Children	Eat more than dietary guidelines on sugar	31%*	24%	22%	8%
	Eat more than dietary guidelines calories	20%*	15%	9%	0%

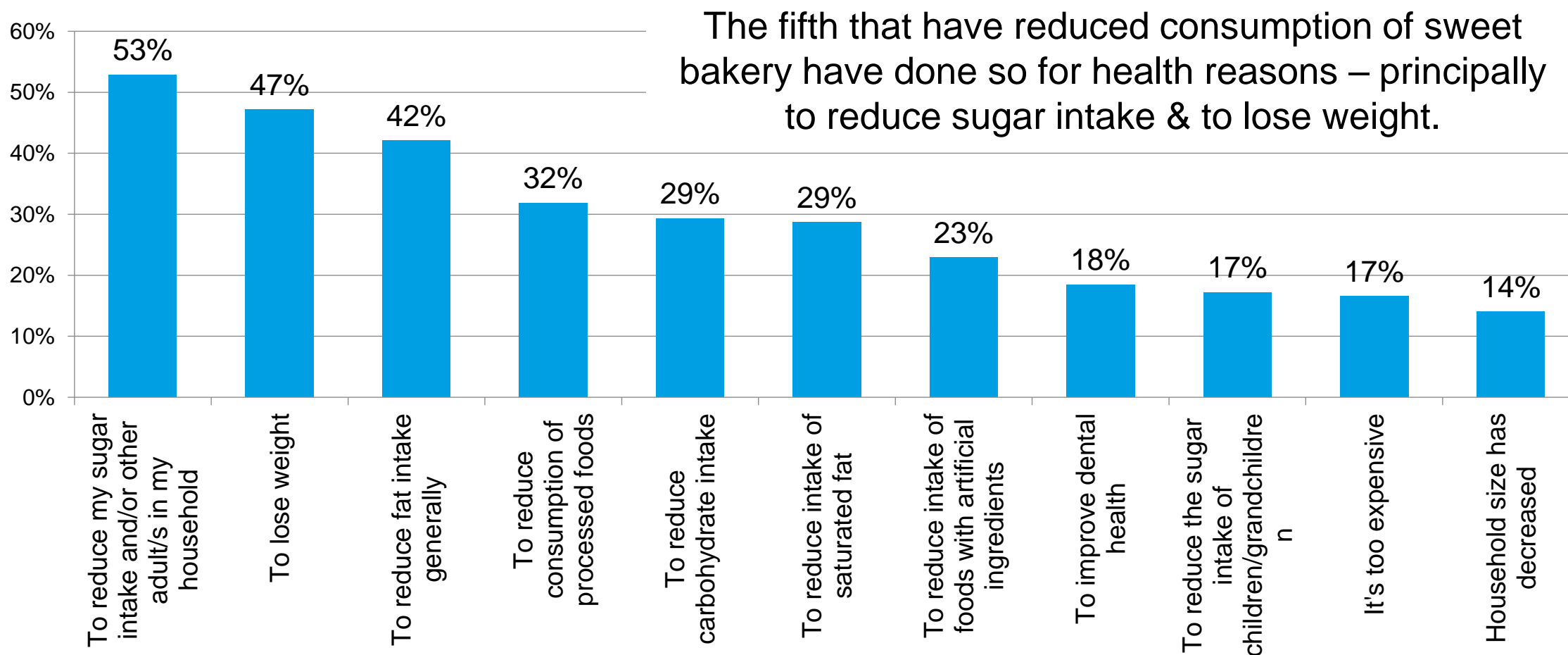
- There is some recognition amongst those buying sweet bakery most often that they are eating more than the guidelines on sugar & calories.
- However most still feel they are meeting guidelines, highlighting the potential need for reformulation to support healthy eating

# Changes in Amounts Purchased vs. A Few Years Ago

	More	Less	No change
Sweet Bakery	19% (-2)	21%	61%
Savoury Bakery	13% (-3)	16%	71%

- The majority of buyers have made no conscious changes to their buying behaviour for sweet or savoury bakery.
- Older adults (55+) are most likely to be buying less sweet bakery items 24%, and households with children aged <18 are most likely to be buying more 29%

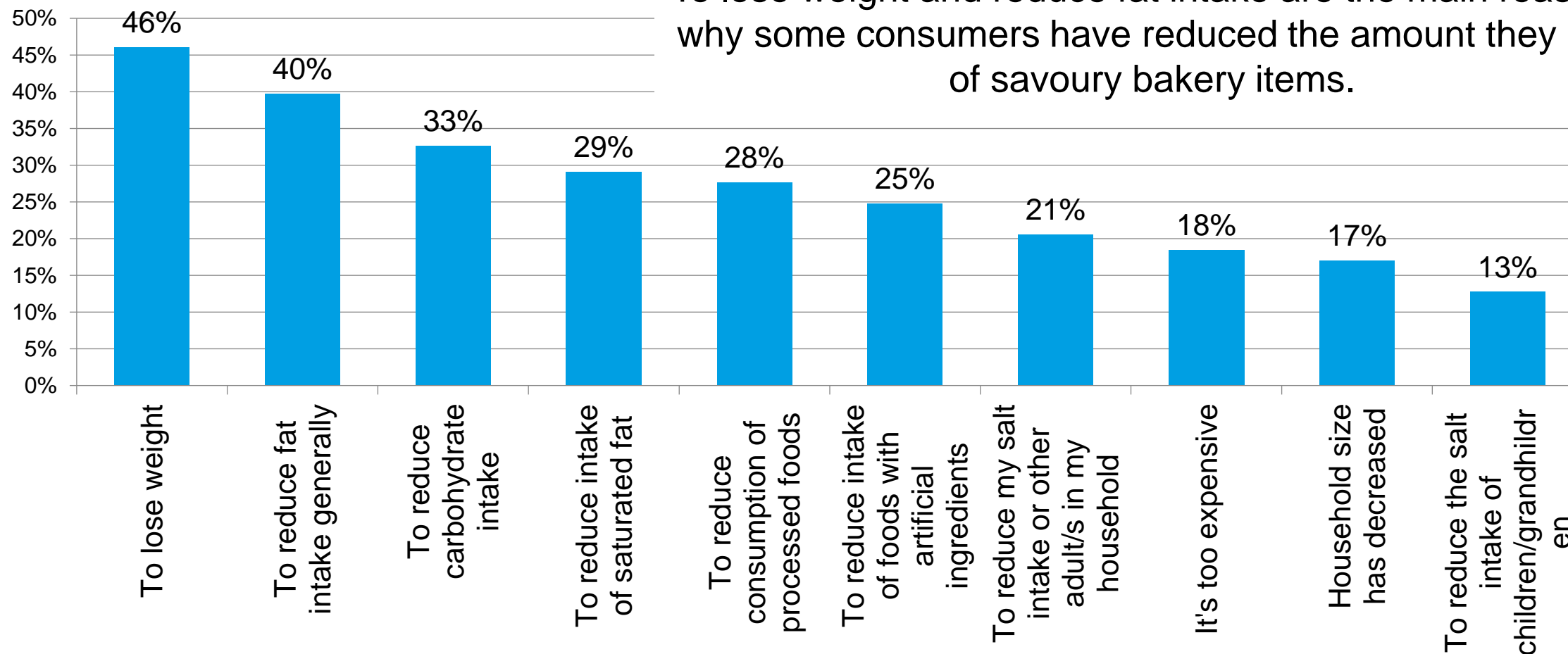
# Reasons for Buying Less: Sweet bakery



For what reasons are you buying less of the following food items? Please answer based on your reasons before the Covid-19 restrictions were introduced in the UK. - Base: 157

# Reasons for Buying Less: Savoury Bakery

To lose weight and reduce fat intake are the main reasons why some consumers have reduced the amount they buy of savoury bakery items.

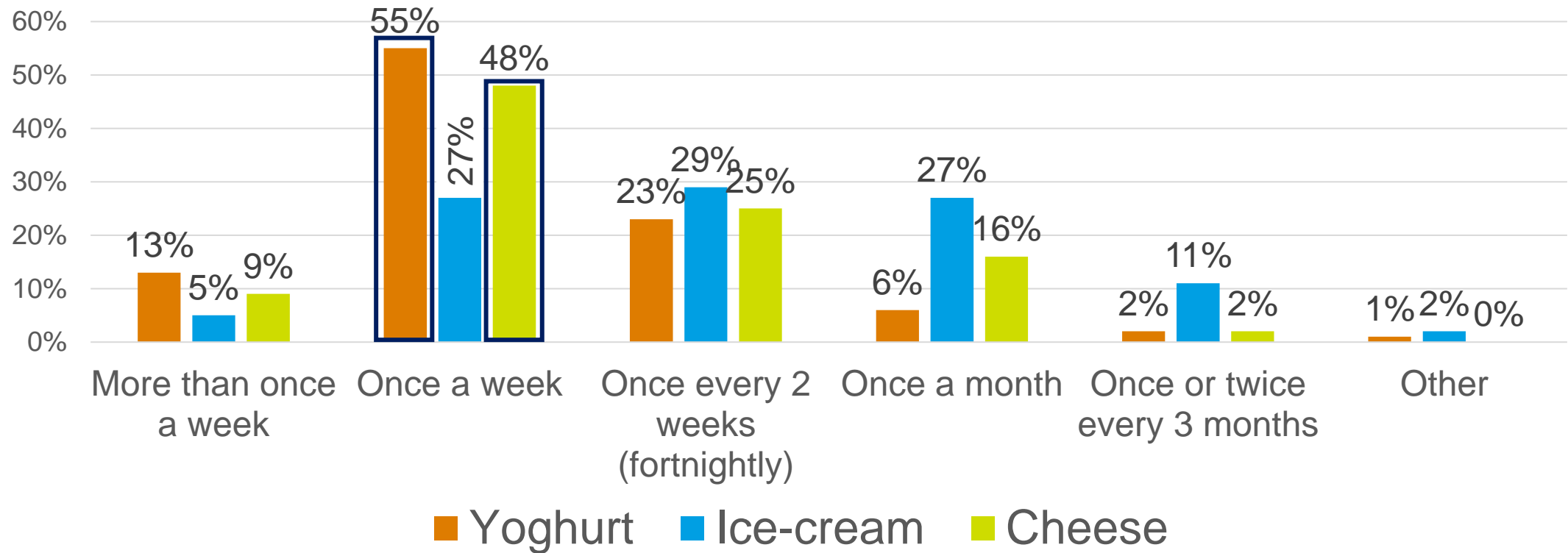


# Reformulating Dairy Products



**Consumer Behaviour, Attitudes and Demand**

# Frequency of Purchase Dairy



- Yoghurt & cheese are regular purchases, ice-cream is purchased on a more varied basis.

# Frequency of Purchase Dairy

	Age				Children at Home		Social Grade			
	Total	18 - 34	35 - 54	55+	Yes aged <18	Yes aged >18	None	AB	C1	C2DE
Cheese										
More than once a week	9%	12%	10%	7%	13%	7%	8%	8%	6%	12%
Once a week	48%	54%	53%	42%	55%	58%	44%	48%	49%	46%
Once every 2 weeks (fortnightly)	25%	25%	21%	28%	23%	19%	27%	24%	26%	26%
Less frequently in 3-month period	18%	10%	16%	23%	9%	16%	21%	20%	19%	15%
Yoghurt										
More than once a week	13%	19%	11%	11%	18%	10%	11%	10%	14%	14%
Once a week	55%	50%	56%	57%	57%	59%	54%	57%	53%	56%
Once every 2 weeks (fortnightly)	23%	26%	23%	22%	22%	25%	24%	24%	28%	20%
Less frequently in 3-month period	9%	4%	9%	10%	3%	6%	11%	8%	5%	10%
Ice-Cream										
More than once a week	5%	8%	5%	3%	7%	4%	4%	5%	5%	5%
Once a week	27%	30%	30%	22%	34%	32%	22%	23%	23%	31%
Once every 2 weeks (fortnightly)	29%	35%	25%	28%	34%	29%	27%	22%	28%	34%
Less frequently in 3-month period	40%	27%	40%	47%	24%	36%	47%	51%	45%	30%

- Young families are buying these products most frequently

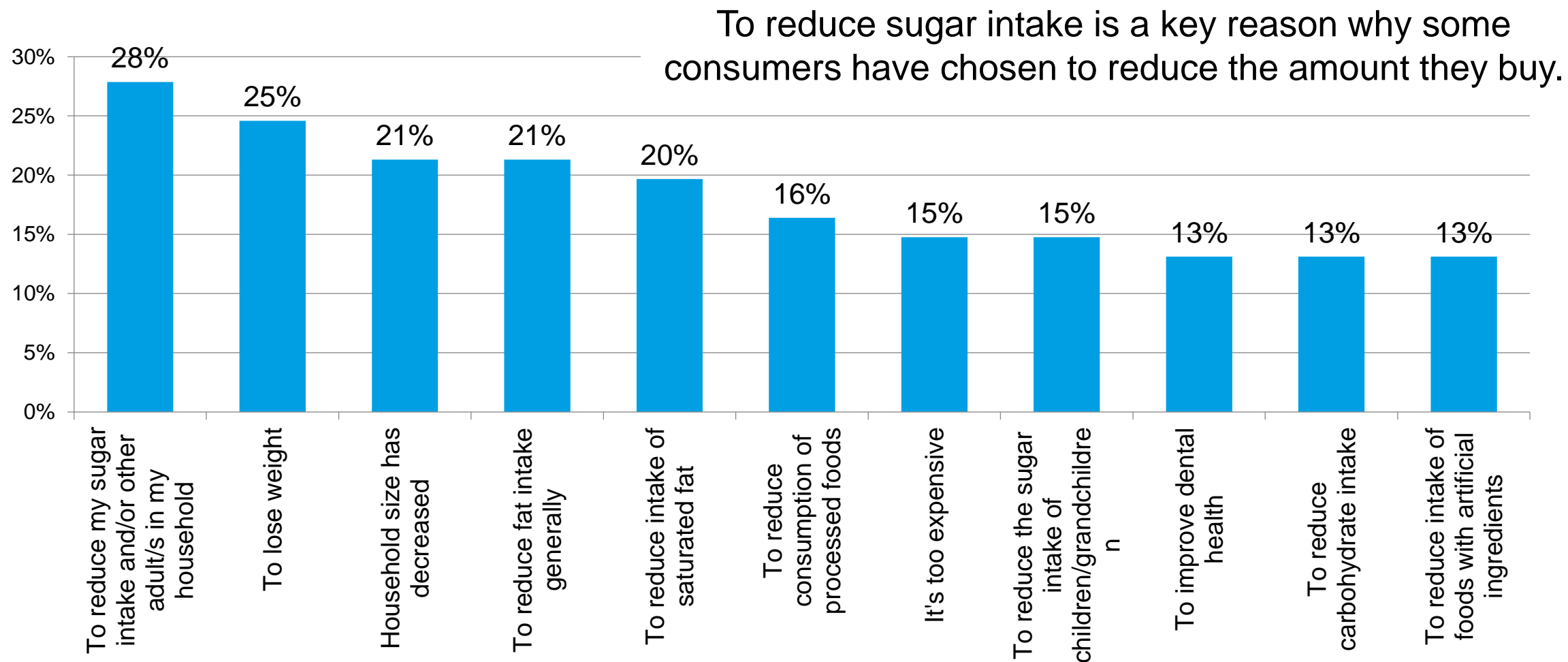
# Changes in Amounts Purchased vs. A Few Years Ago

	More	Less	No Change
Yoghurt	26% (+17)	9%	66%
Cheese	19% (+10)	9%	73%
Ice Cream	19% (+3)	16%	64%

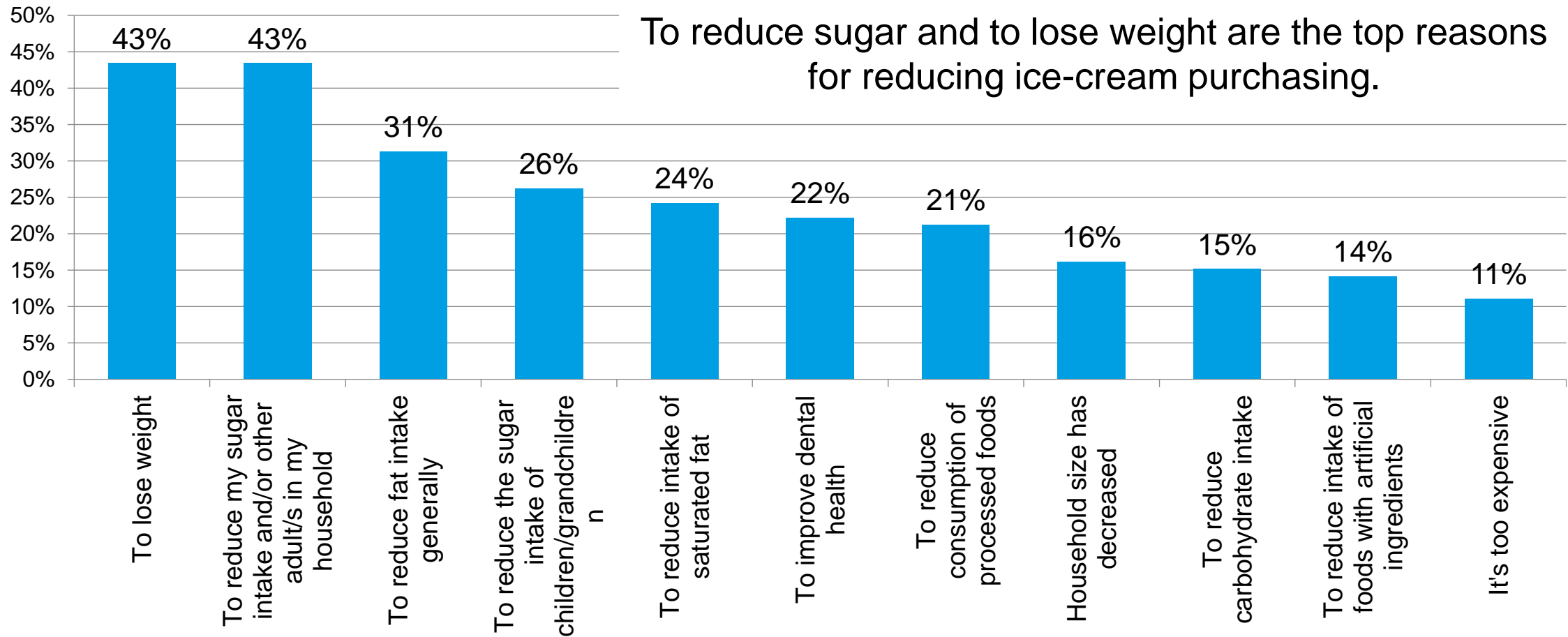
- The majority of Scottish adults have not changed the amount they are buying of these products over the past few years.



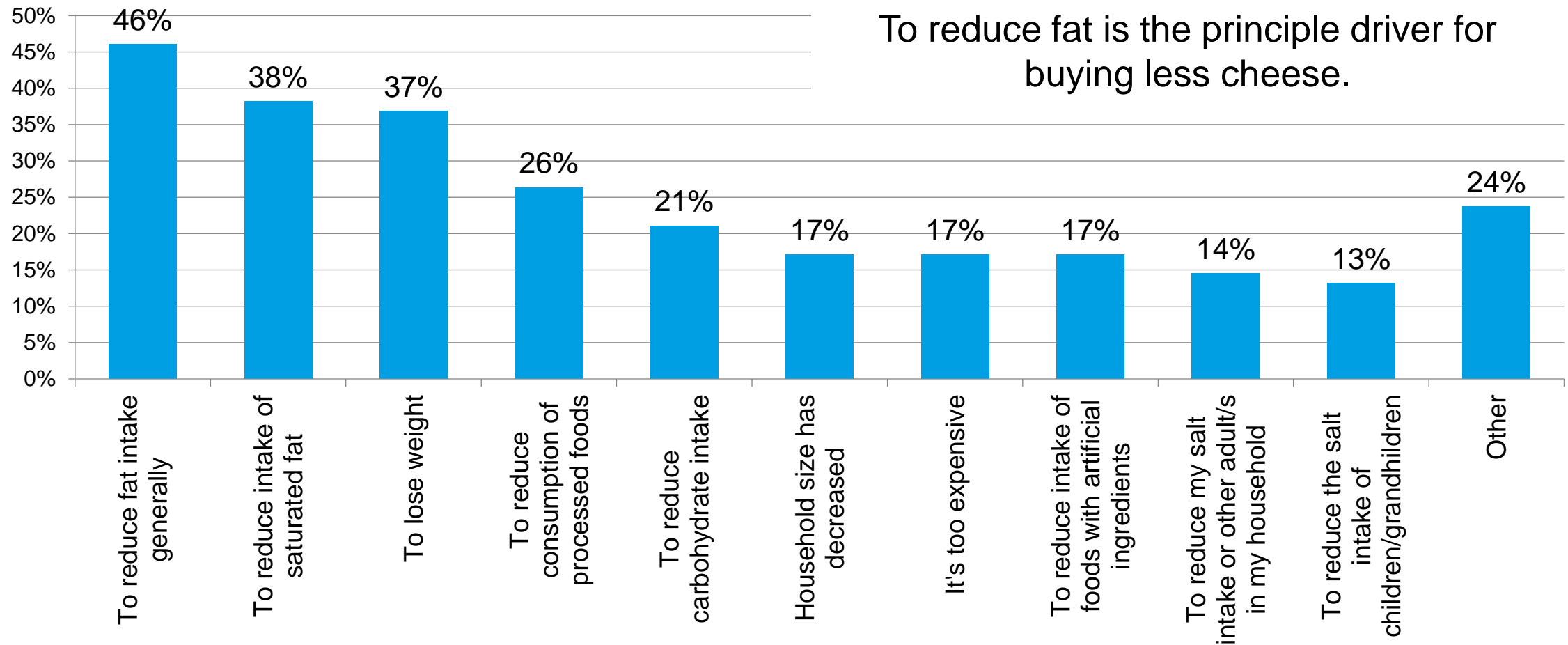
# Reasons for Buying Less: Yoghurt



# Reasons for Buying Less: Ice-cream



# Reasons for Buying Less: Cheese



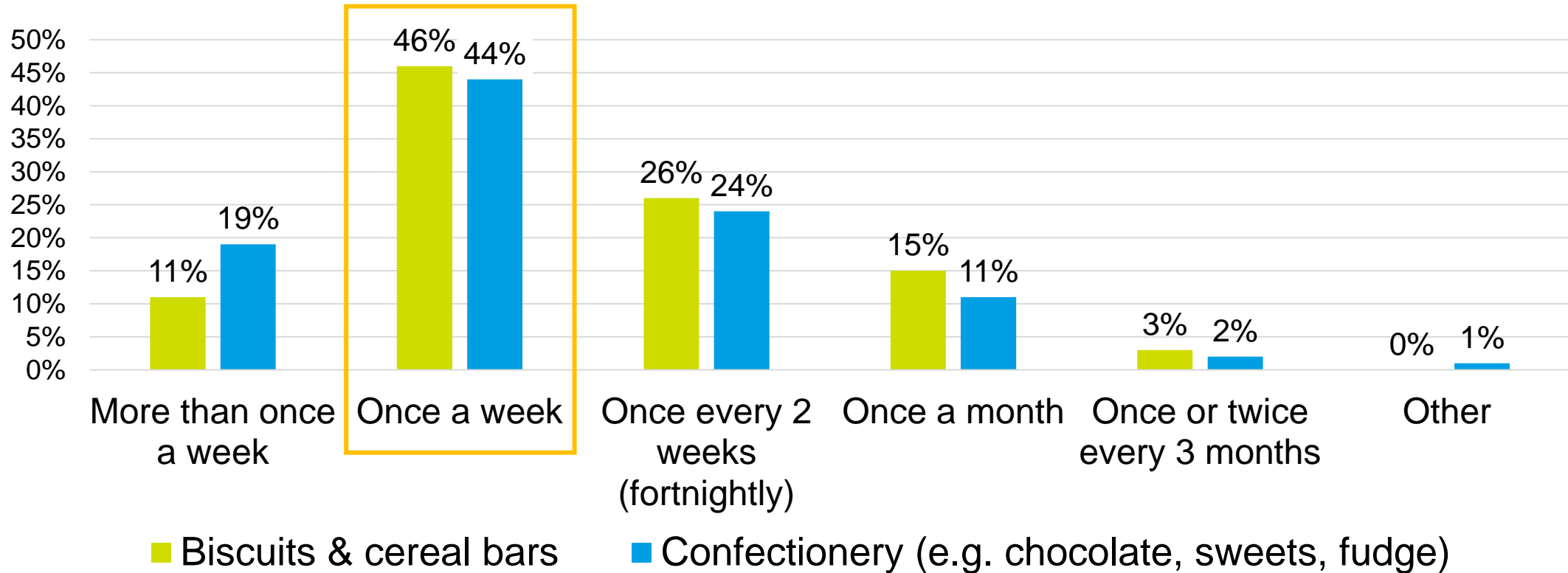
For what reasons are you buying less of the following food items? Please answer based on your reasons before the Covid-19 restrictions were introduced in the UK. - Base: 76

# Reformulating Sweets & Biscuits



**Consumer Behaviour, Attitudes and Demand**

# Frequency of Purchase Confectionery, Biscuits & Cereal Bars



- Confectionery, biscuits and cereal bars are being purchased at least once a week by the majority of Scottish adults.

# Frequency of Purchase Confectionery, Biscuits & Cereal Bars

	Age				Children at Home			Social Grade		
	Total	18 - 34	35 - 54	55+	Yes aged <18	Yes aged >18	None	AB	C1	C2DE
Confectionery										
More than once a week	19%	22%	20%	16%	19%	24%	18%	10%	19%	25%
Once a week	44%	47%	46%	41%	52%	51%	40%	38%	45%	45%
Once every 2 weeks (fortnightly)	24%	20%	22%	28%	19%	18%	26%	31%	22%	20%
Less frequently in a 3-month period	14%	11%	12%	16%	10%	7%	16%	21%	14%	9%
Biscuits & cereal bars										
More than once a week	11%	14%	11%	9%	16%	14%	9%	7%	8%	16%
Once a week	46%	43%	50%	44%	52%	53%	42%	43%	49%	46%
Once every 2 weeks (fortnightly)	26%	28%	25%	25%	23%	19%	28%	28%	27%	24%
Less frequently in a 3-month period	18%	15%	14%	22%	8%	13%	22%	23%	17%	14%

- C2DEs and households with children are buying confectionery most frequently.

# Who Biscuits/Cereal Bars & Confectionery is Purchased For

Children in Household				
	Total	Yes < 18	Yes > 18	No children at home
Confectionery (e.g. chocolate, sweets & fudge)				
Myself	87%	83%	86%	89%
Children/ Grandchildren	31%	72%	63%	12%
Other adult/s in household	51%	52%	58%	49%
Friends/ Family when entertaining	7%	8%	11%	5%
As a gift/other	7%	7%	13%	6%
Biscuits and cereal bars				
Myself	87%	77%	87%	91%
Children/ Grandchildren	27%	68%	52%	9%
Other adult/s in household	51%	55%	59%	49%
Friends/ Family when entertaining	6%	8%	9%	4%
As a gift/other	2%	4%	1%	2%

- In households with children aged under 17, children are key consuming groups.
- 73% of households with children aged 17 or under that are buying confectionery for children, are doing so at least once a week.

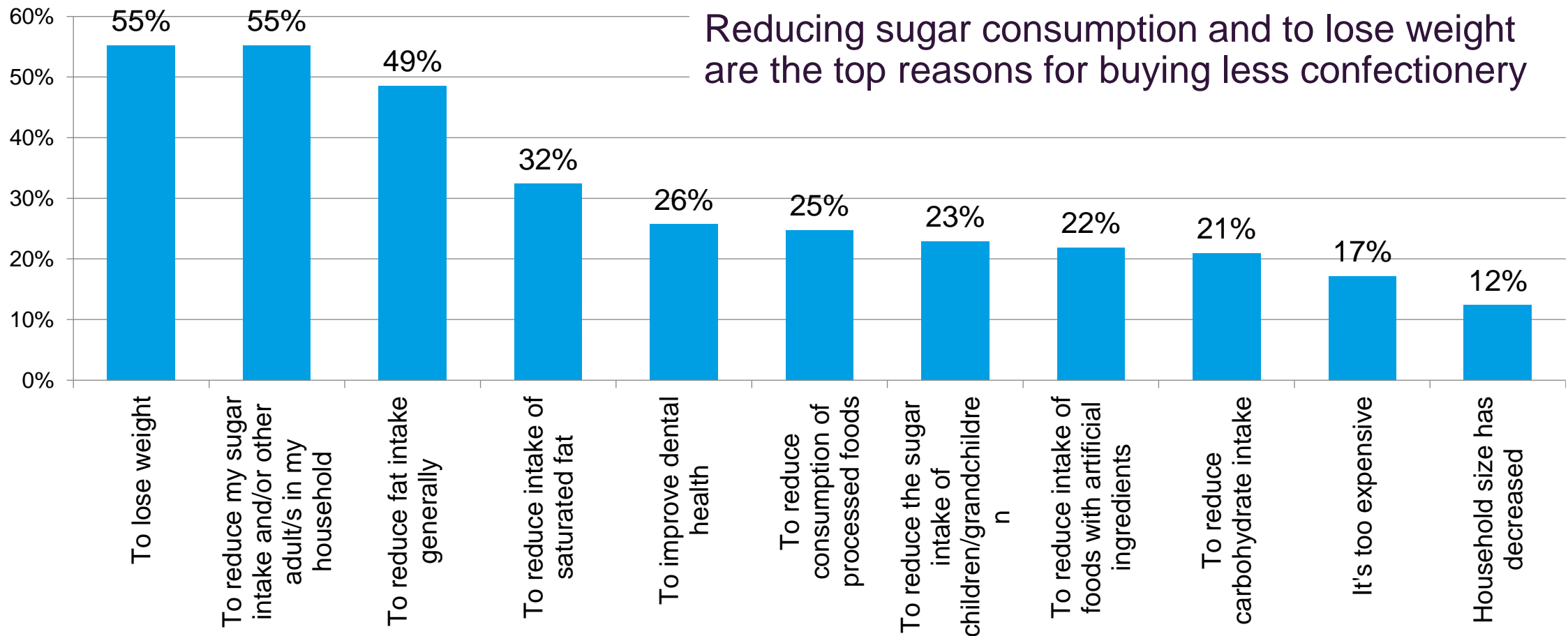
# Changes in Amounts Purchased vs. A Few Years Ago

	More	Less	No change
Confectionery	21% (+7)	14%	65%
Biscuits & Cereal Bars	19% (+5)	14%	67%

- Overall Scottish consumers are buying more of these items.
- 18-34-year olds are most likely to be buying more, 34% doing so for confectionery.



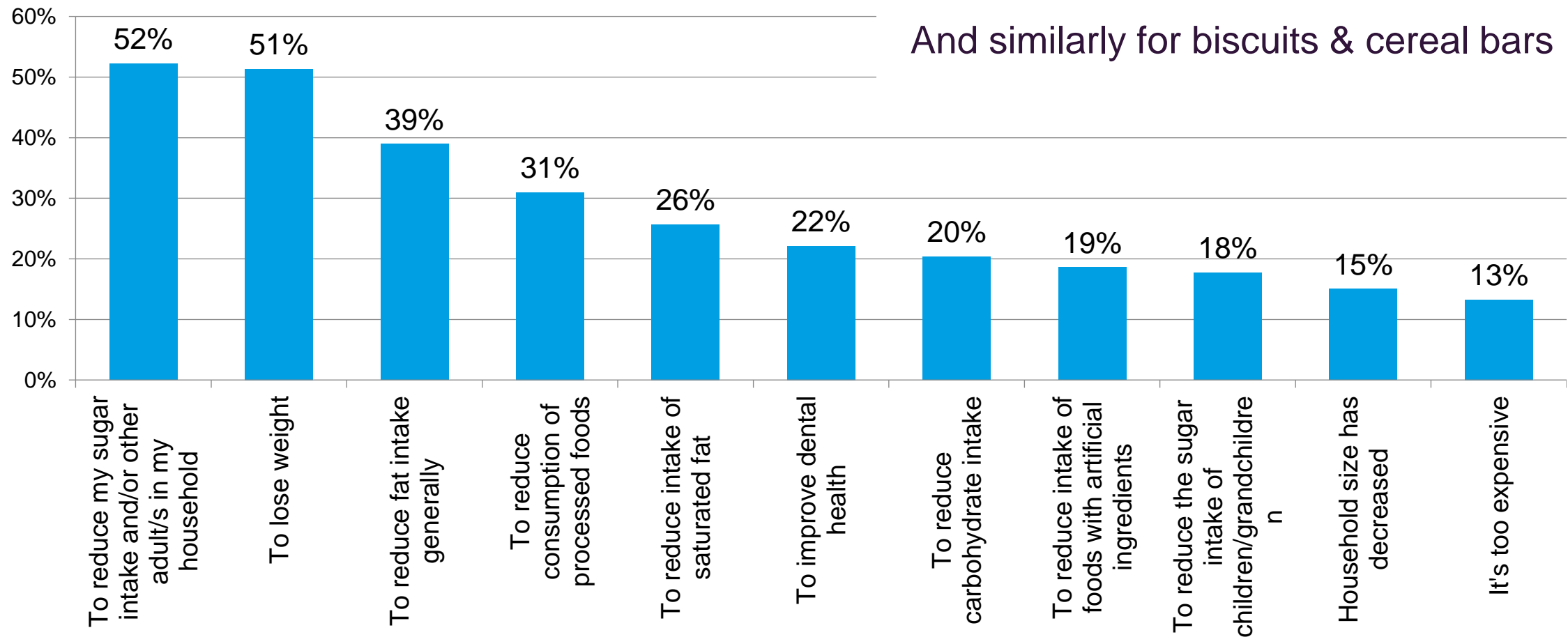
# Reasons for Buying Less: Confectionary



For what reasons are you buying less of the following food items? Please answer based on your reasons before the Covid-19 restrictions were introduced in the UK. - Base: 105

# Reasons for Buying Less: Biscuits & Cereal Bars

And similarly for biscuits & cereal bars



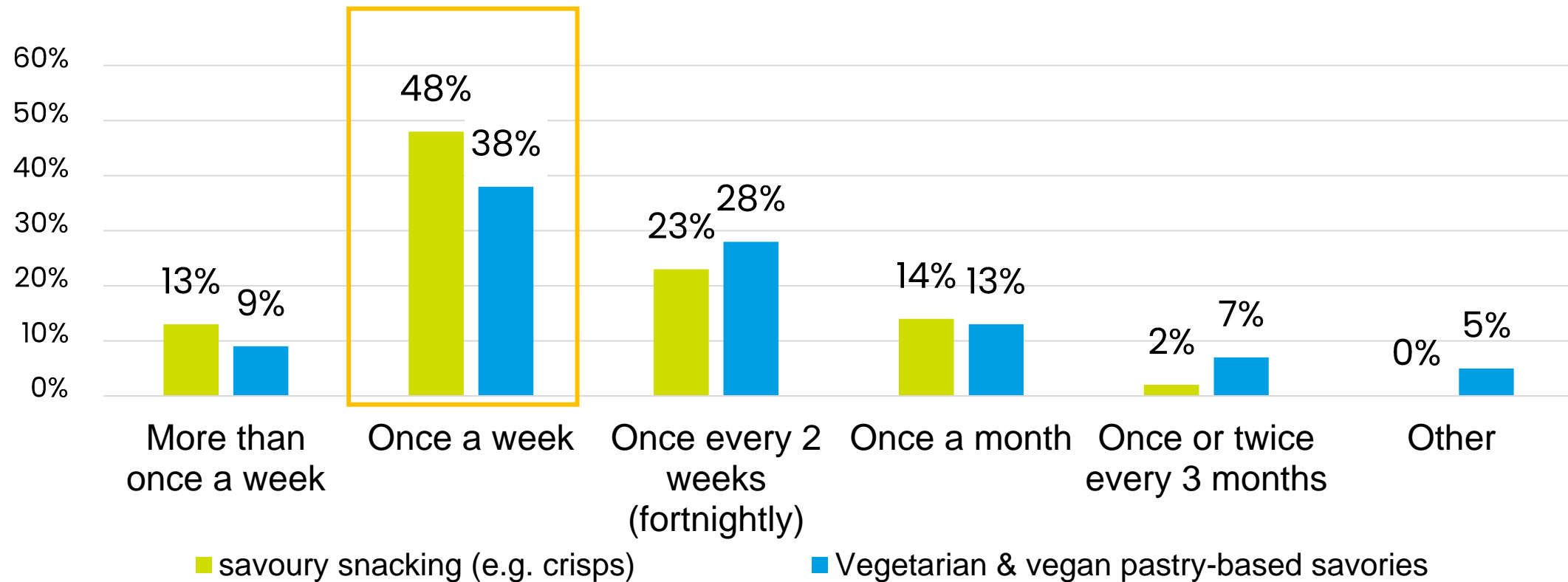
For what reasons are you buying less of the following food items? Please answer based on your reasons before the Covid-19 restrictions were introduced in the UK. - Base: 113

# Reformulating Savouries



**Consumer Behaviour, Attitudes and Demand**

# Frequency of Purchase Savouries



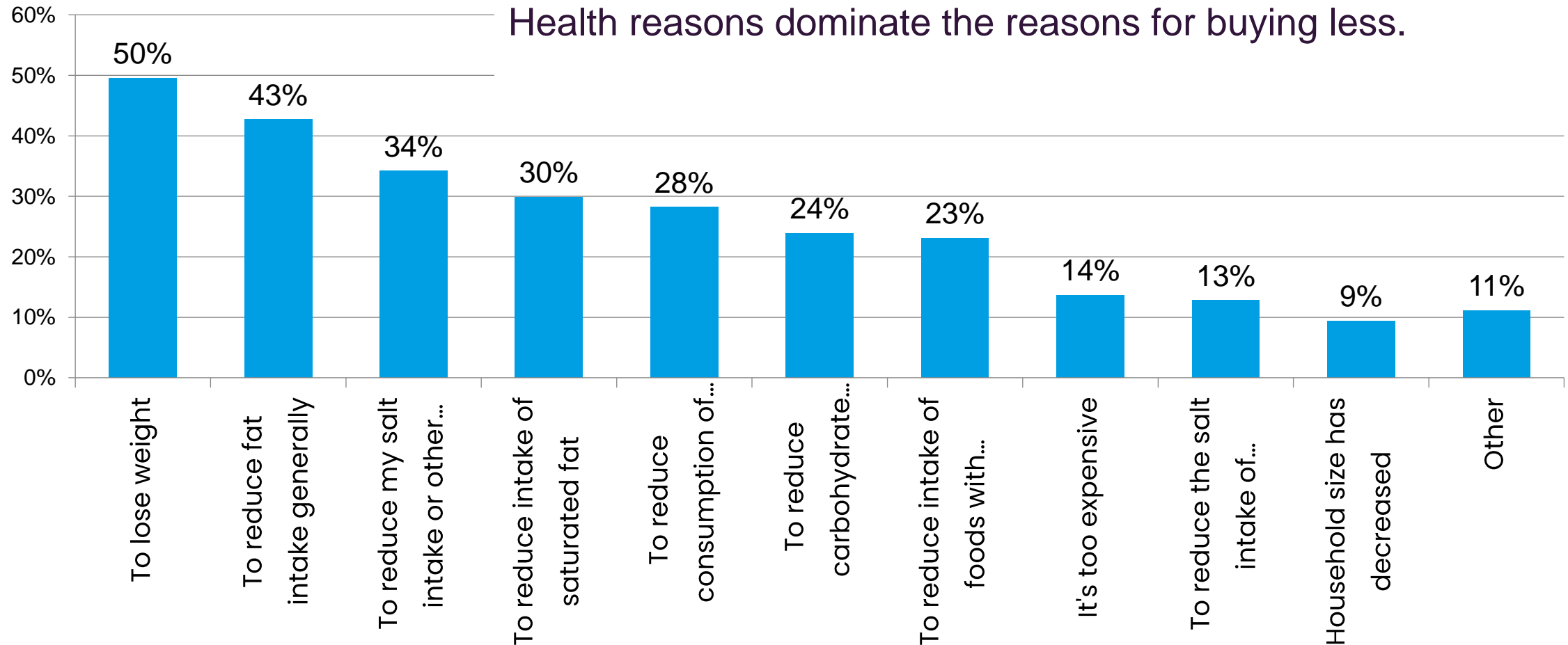
- The majority of Scottish adults are buying crisps at least once a week. Younger adults (18-34) and families with children are buying most frequently.

# Changes in Amounts Purchased vs. A Few Years Ago

	More	Less	No change
Vegetarian and vegan pastry-based savouries	38% (+28)	10%	52%
Savoury snacks (crisps)	20% (+6)	14%	66%

- Families with children and young adults are most likely to be buying more.

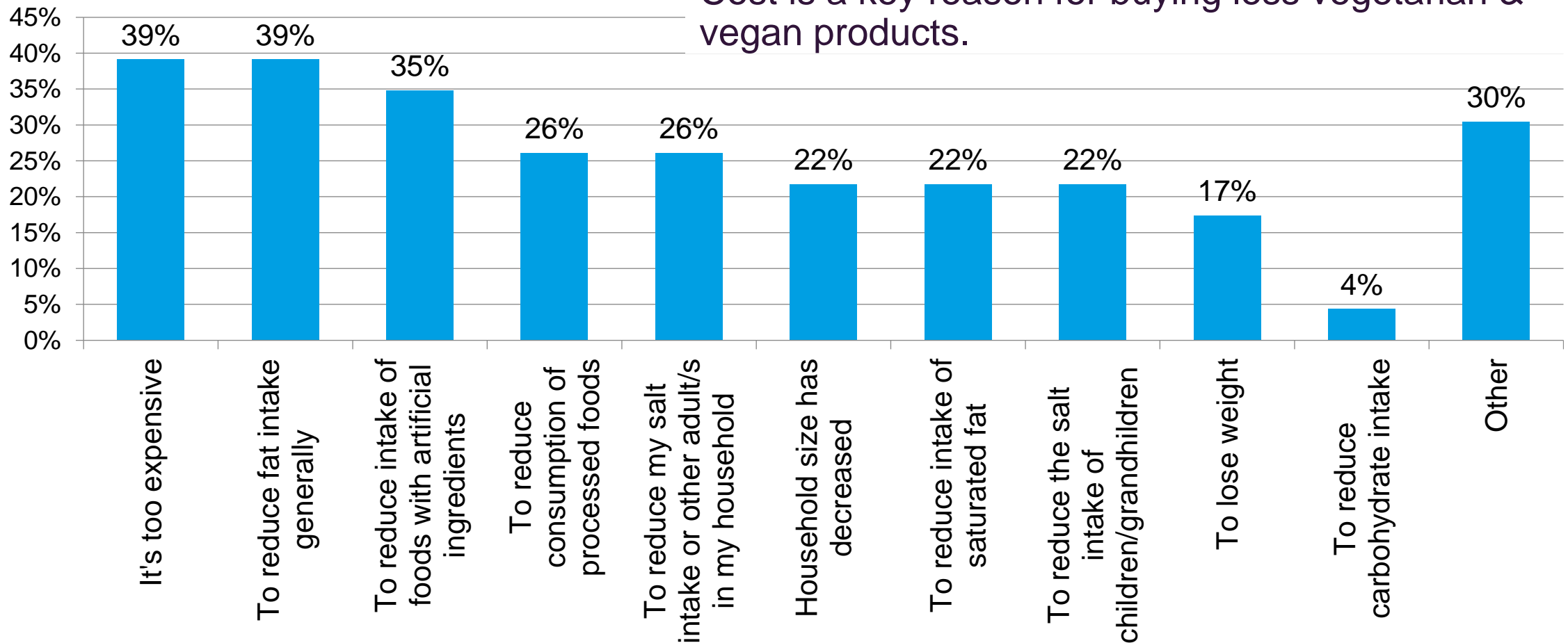
# Reasons for Buying Less: Savoury snacks (e.g. crisps)



For what reasons are you buying less of the following food items? Please answer based on your reasons before the Covid-19 restrictions were introduced in the UK. - Base: 117

# Reasons for Buying Less: Vegetarian & Vegan Pastry Based Savouries

Cost is a key reason for buying less vegetarian & vegan products.





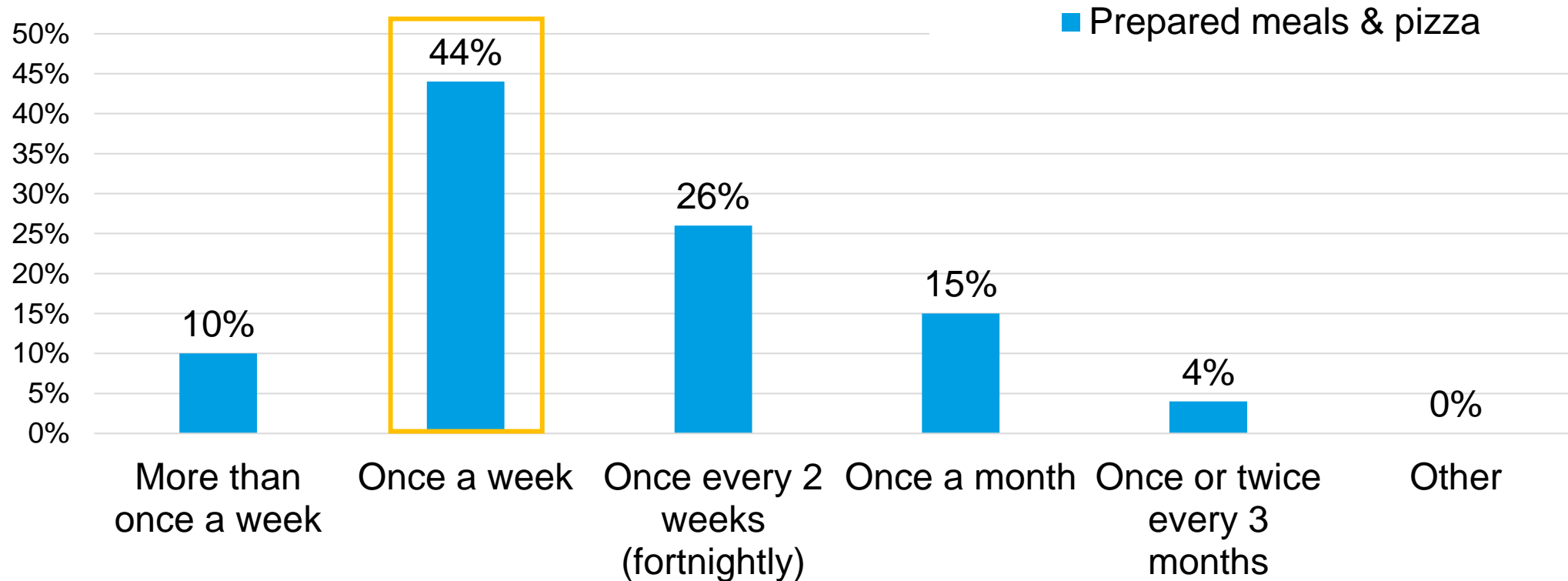
# Reformulating Ready Meals & Pizza



**Consumer Behaviour, Attitudes and Demand**



# Frequency of Purchase Prepared Meals & Pizza



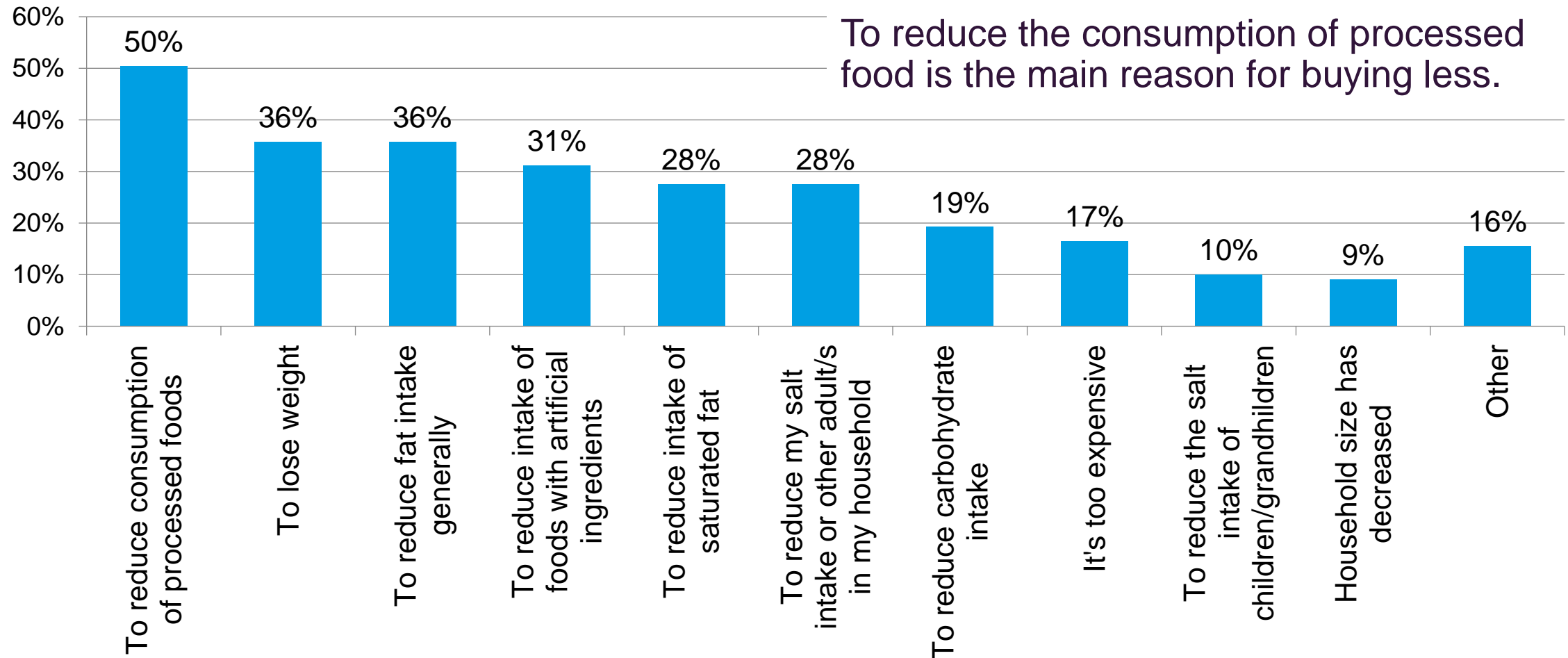
- Over half are buying these products at least once a week.
- Nearly two-thirds of 18-34 year olds are doing so.

# Changes in Amounts Purchased vs. A Few Years Ago

	More	Less	No change
Prepared meals & pizza	17% (+1)	16%	67%

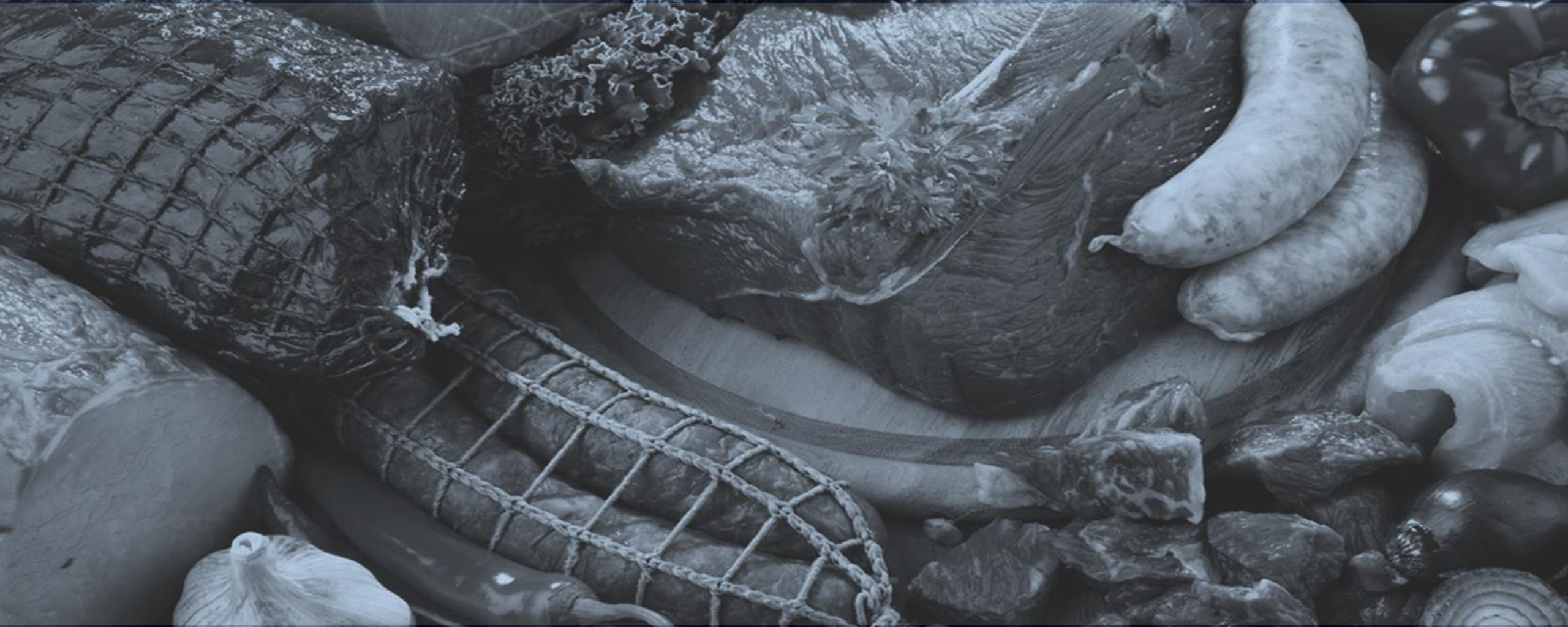
- The majority of buyers have made no conscious changes to their buying behaviour.

# Reasons for Buying Less: Prepared Meals and Pizza



For what reasons are you buying less of the following food items? Please answer based on your reasons before the Covid-19 restrictions were introduced in the UK. - Base: 109

# Reformulating Butchery Products



**Consumer Behaviour, Attitudes and Demand**

# Frequency of Purchase Butchery & Meat Products

	More than once a week	Once a week	Once every 2 weeks	Once a month	Once or twice every 3 months	Other
Fresh meat (raw) (e.g. red meat, poultry)	16%	58%	16%	8%	2%	0%
Cooked meat (e.g. ham, cooked chicken)	13%	60%	18%	7%	2%	0%
Fresh processed meat (raw) (e.g. burgers, sausages)	10%	47%	26%	14%	3%	0%
Meat snacks (e.g. Scotch eggs, sausage rolls)	8%	38%	31%	17%	5%	0%
Pastry based meat pies, quiches & pasties	6%	35%	33%	20%	5%	1%

- Meat snacks, pies & pastries are more occasional purchases.

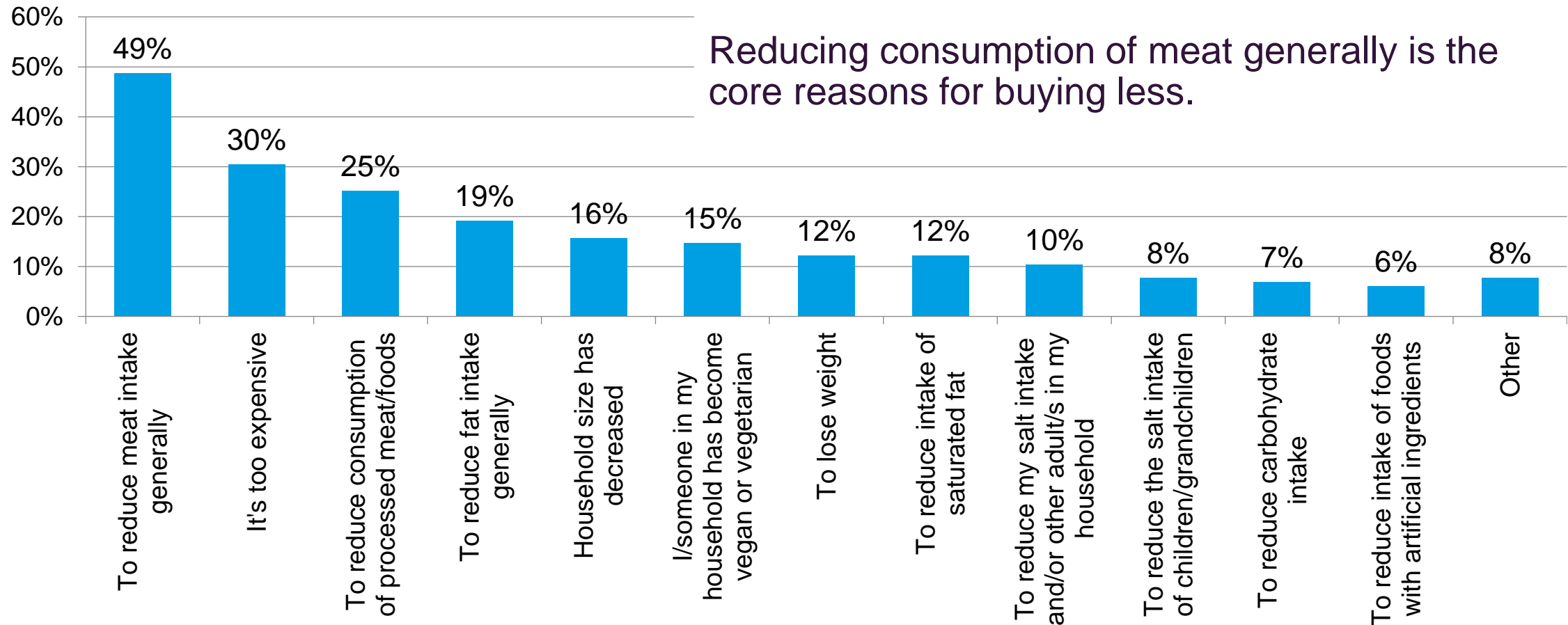
# Changes in Amounts Purchased vs. A Few Years Ago

	More	Less	No change
Fresh Meat	16% (+1)	15%	69%
Fresh Processed Meat	12% (-9)	21%	67%
Cooked Meat	15% (+1)	14%	70%
Meat Snacks	15% (-6)	21%	64%
Eat pies, quiche & pasties	12% (-8)	20%	67%

- The majority of buyers have made no conscious changes to their buying behaviour.
- A fifth have made a conscious decision to reduce the amount they buy of processed meats.

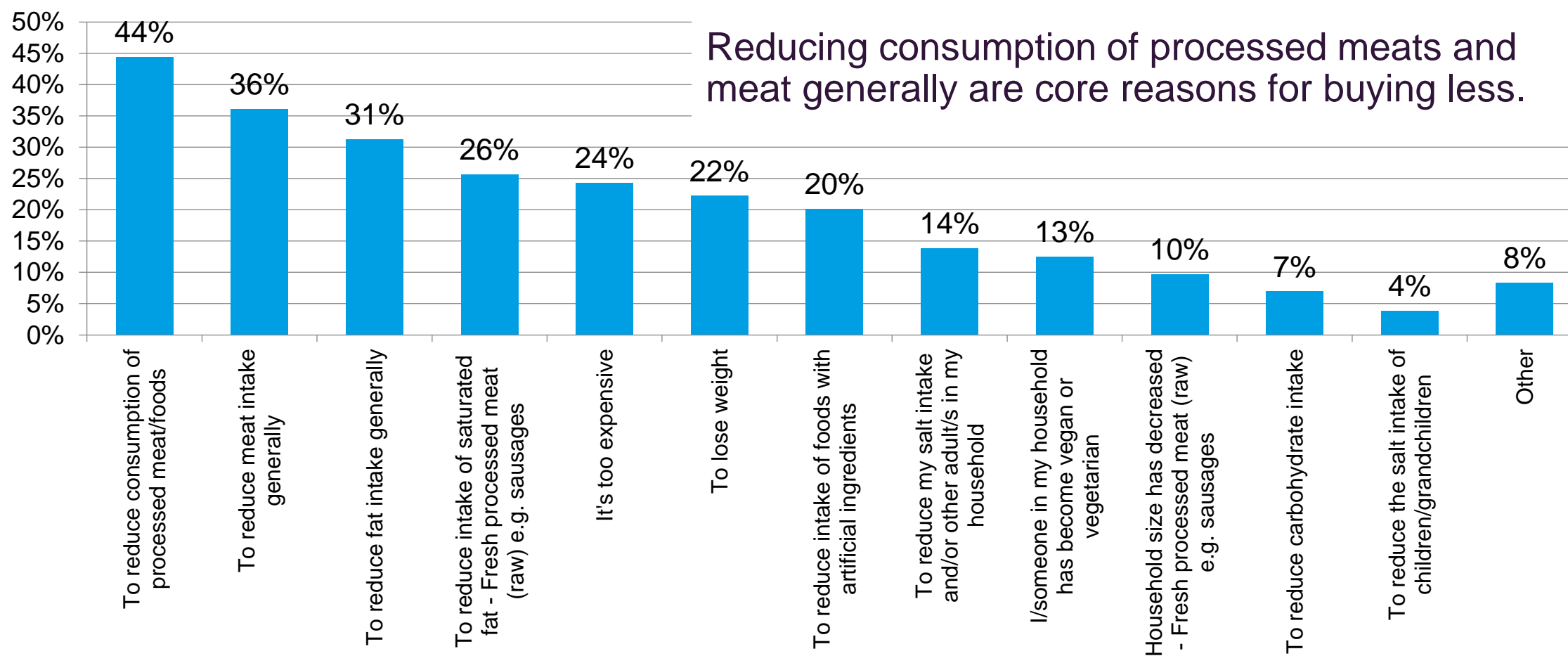


# Reasons for Buying Less: Fresh Meat (Raw)



For what reasons are you buying less of the following food items? Please answer based on your reasons before the Covid-19 restrictions were introduced in the UK. - Base: 115

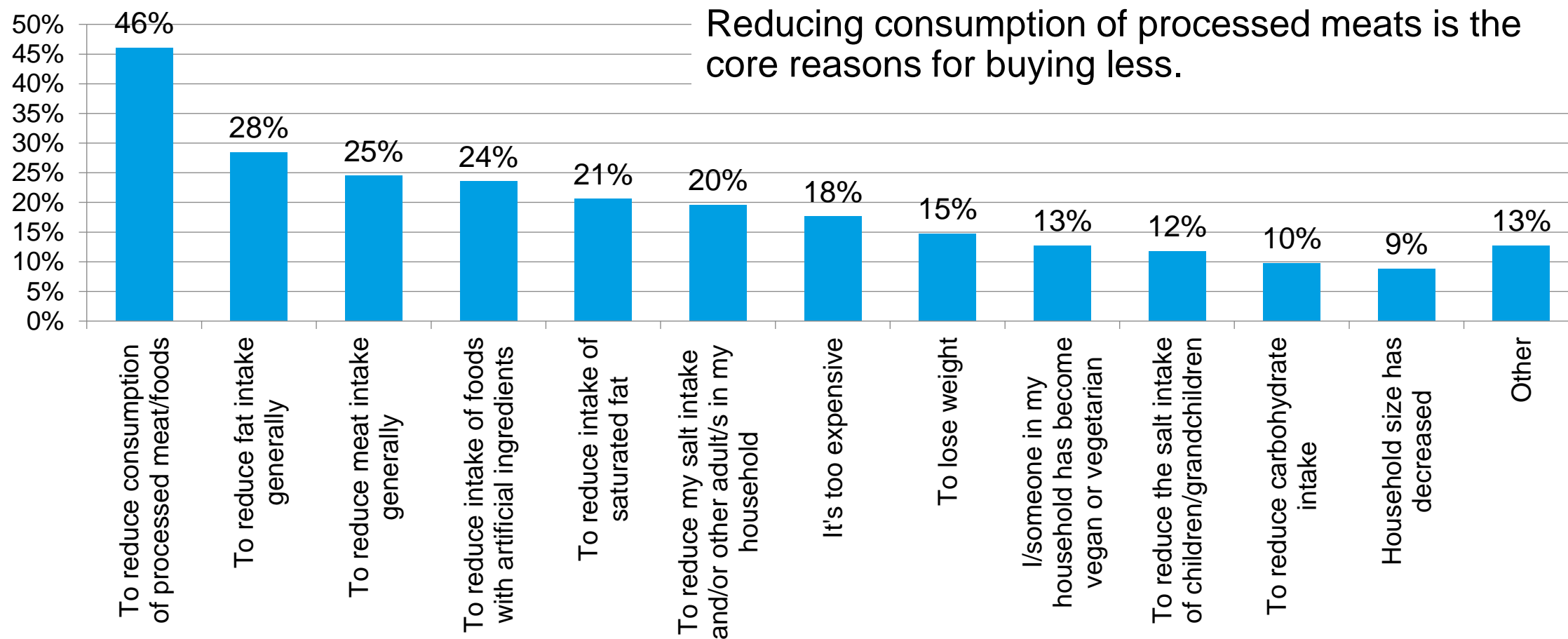
# Reasons for Buying Less: Fresh processed meat (raw) e.g. sausages



For what reasons are you buying less of the following food items? Please answer based on your reasons before the Covid-19 restrictions were introduced in the UK. - Base: 144

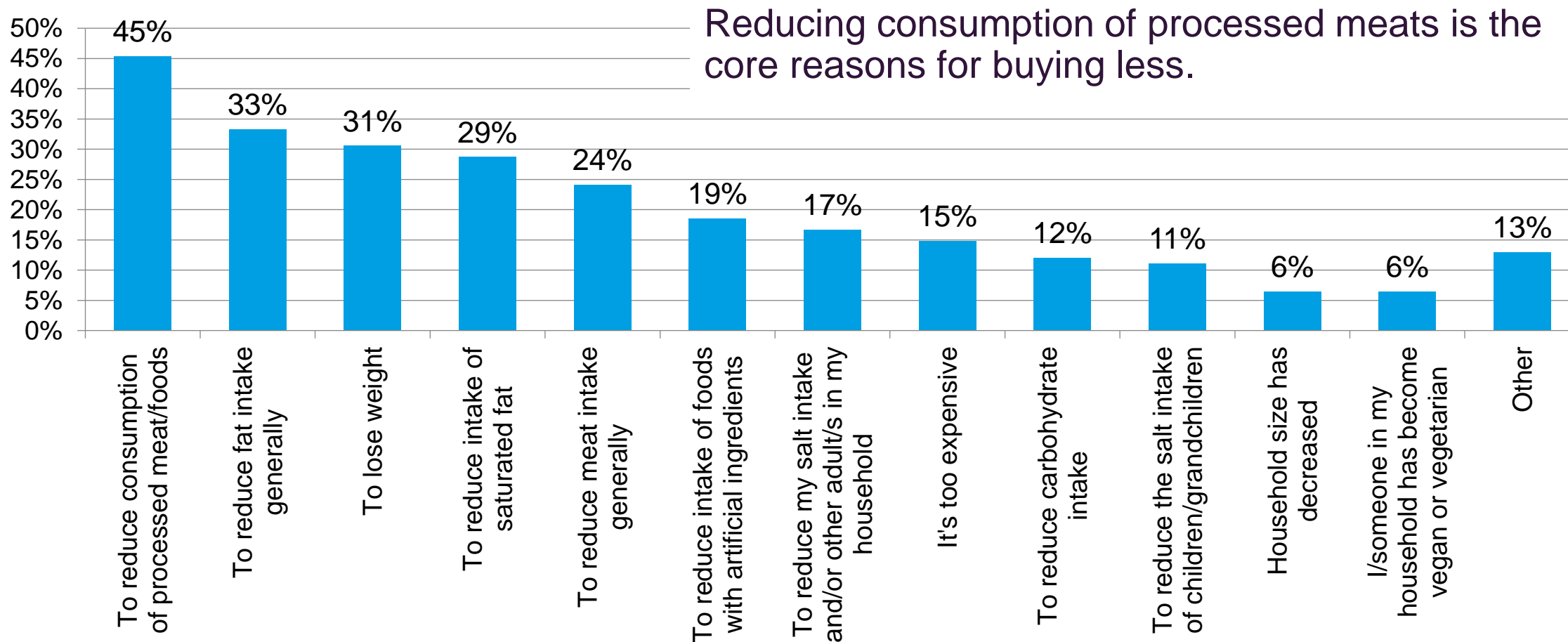


# Reasons for Buying Less: Cooked Meat

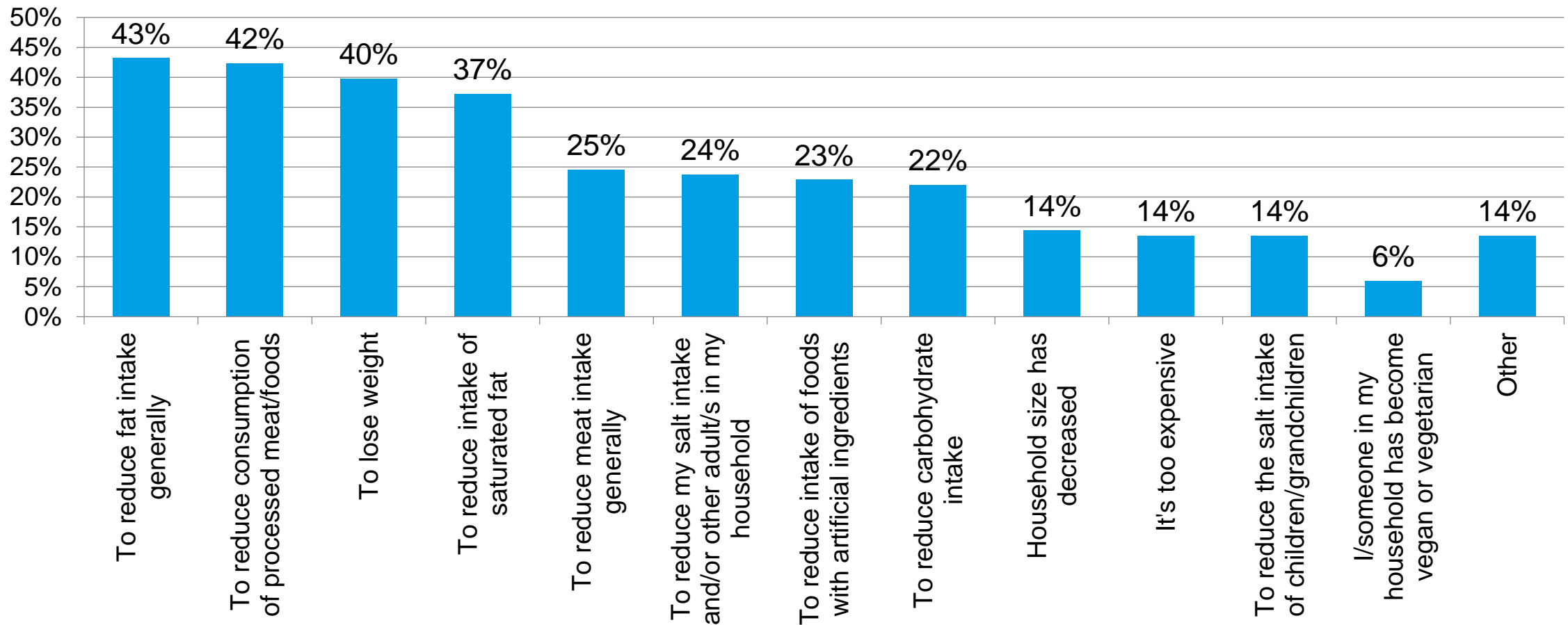


For what reasons are you buying less of the following food items? Please answer based on your reasons before the Covid-19 restrictions were introduced in the UK. - Base: 102

# Reasons for Buying Less: Meat Snacks



# Reasons for Buying Less: Pastry Based Meat Pies, Quiches and Pasties



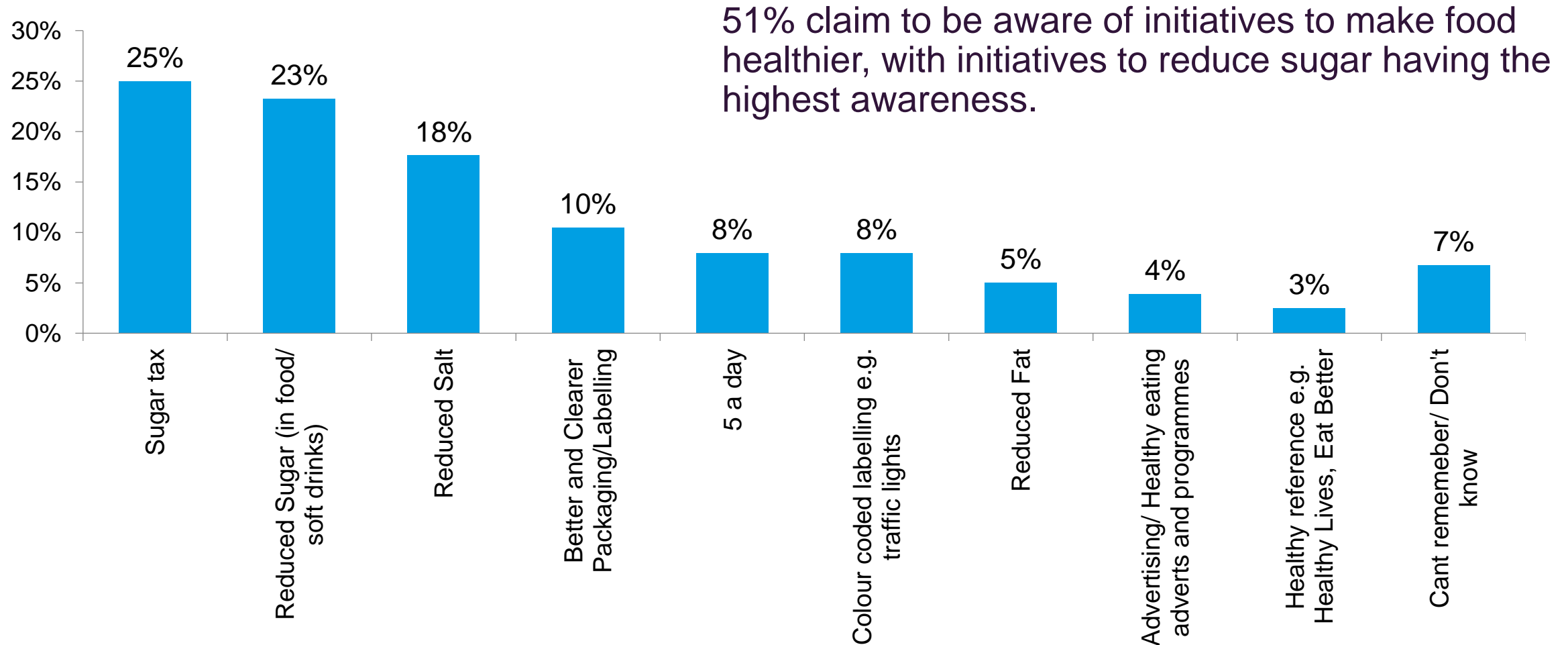
For what reasons are you buying less of the following food items? Please answer based on your reasons before the Covid-19 restrictions were introduced in the UK. - Base: 118

## **SECTION 2 - Consumer Awareness & Perceptions**

**Initiatives and attempts to make existing food products healthier**

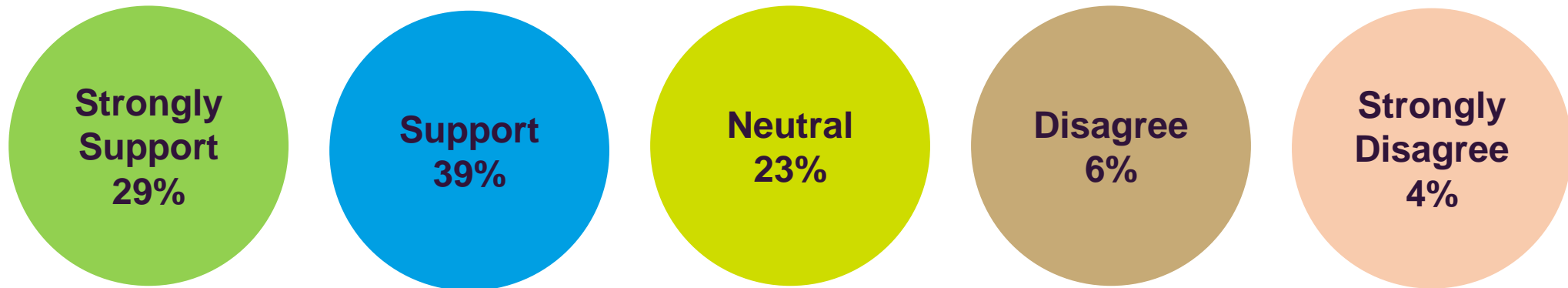


# Spontaneous Awareness of Initiatives to Make Food Healthier



# Perceptions of Scottish Government's Reformulation Initiative

The Scottish Government is asking food businesses to make packaged or processed foods healthier by **reducing the amount of salt, sugar, fat and calories** and where relevant **increasing the amount of fibre or fruits & vegetables** contained within them. This may include small changes to the recipe of products (reformulation) or reducing portion sizes.



- Just over two-thirds of Scottish adults support the initiative.
- Although support is weakest within the DE social group; 59% supporting vs. 75% of ABC1s

# Spontaneous Reasons for Supporting Initiative

Encouraging  
better diet/healthy  
eating with minimal  
consumer effort  
**37%**

Helps  
improve  
health/  
reduces ill  
health  
**12%**

Reduces  
obesity  
**10%**

- Most of the reasons given for supporting the initiative, referred to helping people/society to be healthier rather than helping them personally to be healthier.

I think it is an  
important nudge  
to keep people  
healthy

It would make  
people eat  
more healthily  
without thinking  
about it.

To extend the  
life span of  
people

Obesity and heart  
disease is a major  
problem...these  
actions may help.

To keep  
Scotland  
healthy and  
give the kids a  
chance



# Spontaneous Reasons for Not Supporting Initiative

46%

Up to Individual/  
Freedom of  
Choice

18%

Nanny State  
(Single party rule)

18%

Food and Drink  
doesn't taste as  
good

7%

Don't like  
change

5%

Only a problem  
for overweight  
people

It's up to the  
individual what  
they eat

It's taking away consumer  
choice. It may not be  
good for me, but I make a  
conscious choice to buy  
these- this should not be  
a government decision

It's up to the person  
if they choose to  
buy a product no  
matter what the  
ingredient is

I think that people  
should have a  
choice to eat things  
they enjoy without  
Government  
interference



# Overall view on what food companies/brands should be doing to help make people's diets healthier

- Nearly three quarters of Scottish consumers feel that food companies and brands should be doing something to help make people's diets healthier.
- Reformulation is the most popular route, reducing portion size the least.
- There is also a role for new healthier products to provide consumer choice.



# Reformulation not Portion Size Reduction

- The main objection to a reduction in portion size is that there is a perception that there would not be a proportionate reduction in price.

I feel it is unfair as they would not reduce pricing

Portions size would reduce but price inevitably would not

If they reduce the portions sizes then I'd be forced to buy more to eat the same amount as I want to eat

For an indulgence like this portion size is MY responsibility

The size of product is not the problem

Lowering the fat or salt per 100g is better than reducing portion size

If they reduce the portions sizes then I'd be forced to buy more to eat the same amount as I want to eat

I can't afford to pay more to be healthy. I think healthy foods should be made more affordable.

# Views potentially informed by negative press coverage on 'shrinkflation'

**BBC**

**Shrinkflation: Bread and breakfast cereals most affected**

**INDEPENDENT**


**Shrinkflation: Hundreds of products are getting smaller, from cereals to chocolate bars**

Inflation has been low but manufacturers continue to implement 'stealthy' price rises by making packets smaller, research finds

**The  
Guardian**

Shrinkflation: for those struggling, it's about more than iust chocolate bars

# Product Reformulation...



**82%** Would want to know about a reformulated product

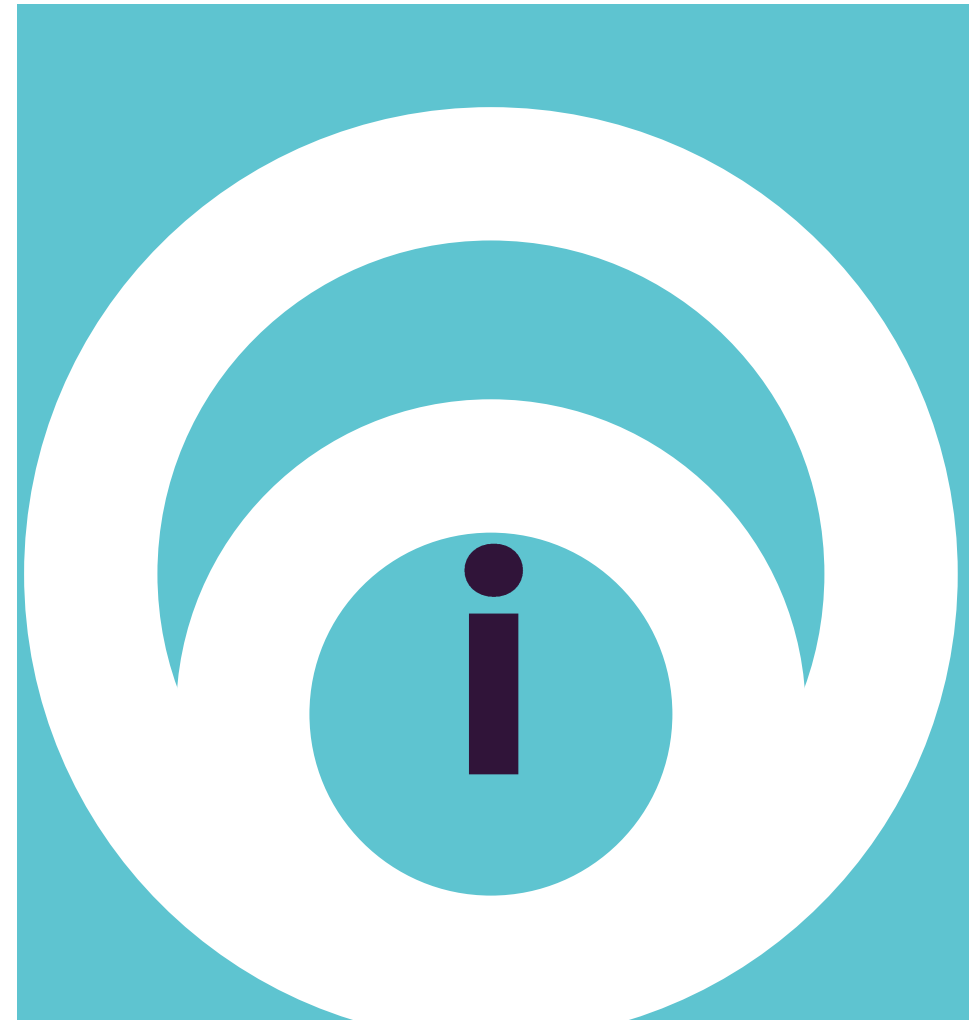
If a food brand/company **reformulated** a product you normally buy (changed the recipe) to make it healthier, would you want it to inform you of the changes? - Base: 1012



**9%** Would NOT want to know about a reformulated product

# How Would they Like to Be Informed?

- 60%** Label on the front of pack telling me that it's a new/improved recipe
- 58%** Label on the front of the pack informing me of the percentage change in fat, sugar, salt, calories or fibre etc.
- 36%** Label on the back of pack telling me the percentage change in fat, sugar, salt, calories or fibre etc.
- 26%** Label on the back of pack telling me that it's a new/improved recipe
- 21%** Communications from the brand/company e.g. social media
- 20%** In store information



# Portion Size Change...



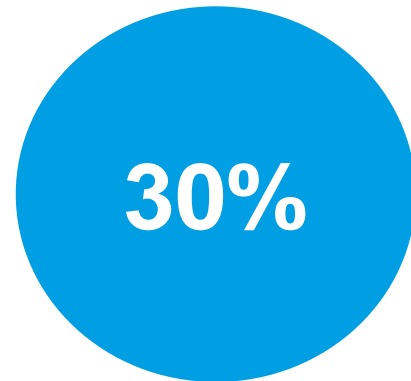
**83%** Would want to know about  
a reduced portion size



**9%** Would NOT want to know  
about a reduced portion size

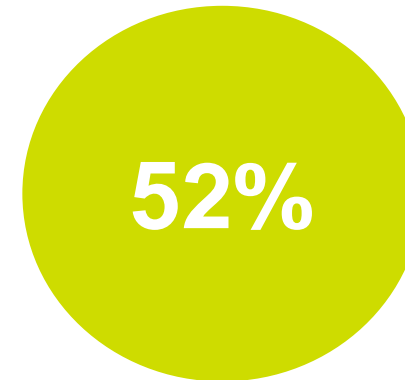
# How Would You Feel About A Company if They Reformulated or Reduced the Portion Size and Didn't Communicate the Change

## Reformulation



**I would think more  
negatively about the  
company/brand**

## Reducing Portion Size



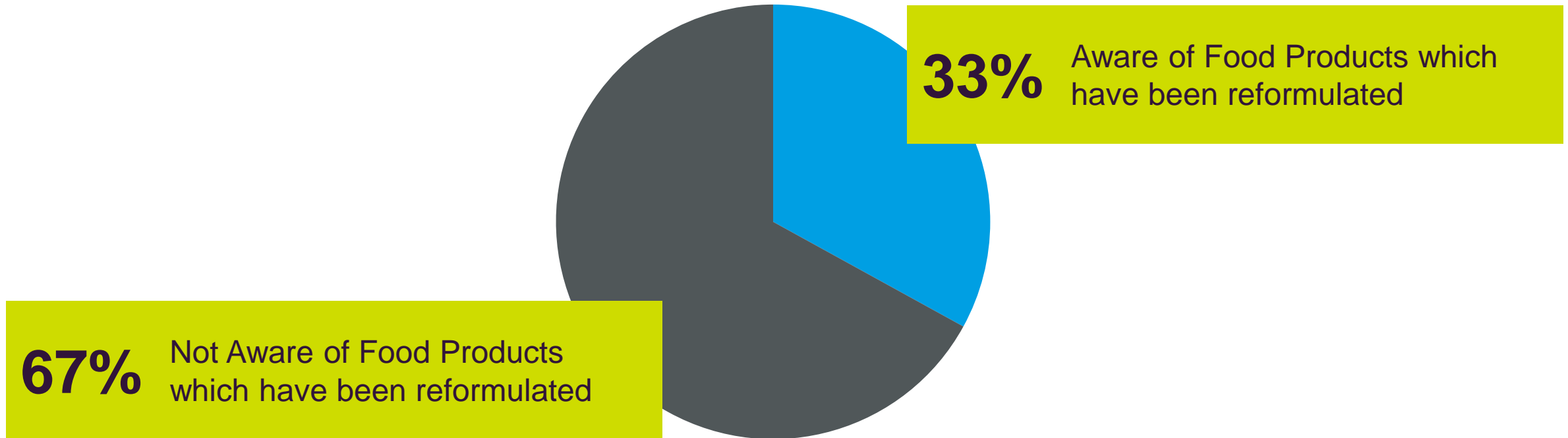
**I would think more  
negatively about the  
company/brand**

- While it may be tempting to not communicate any changes due to concerns about customer reaction
- There may a greater risk from negative consumer sentiment as a result of *not* informing...particularly if reducing portion sizes



# Awareness of Reformulated products

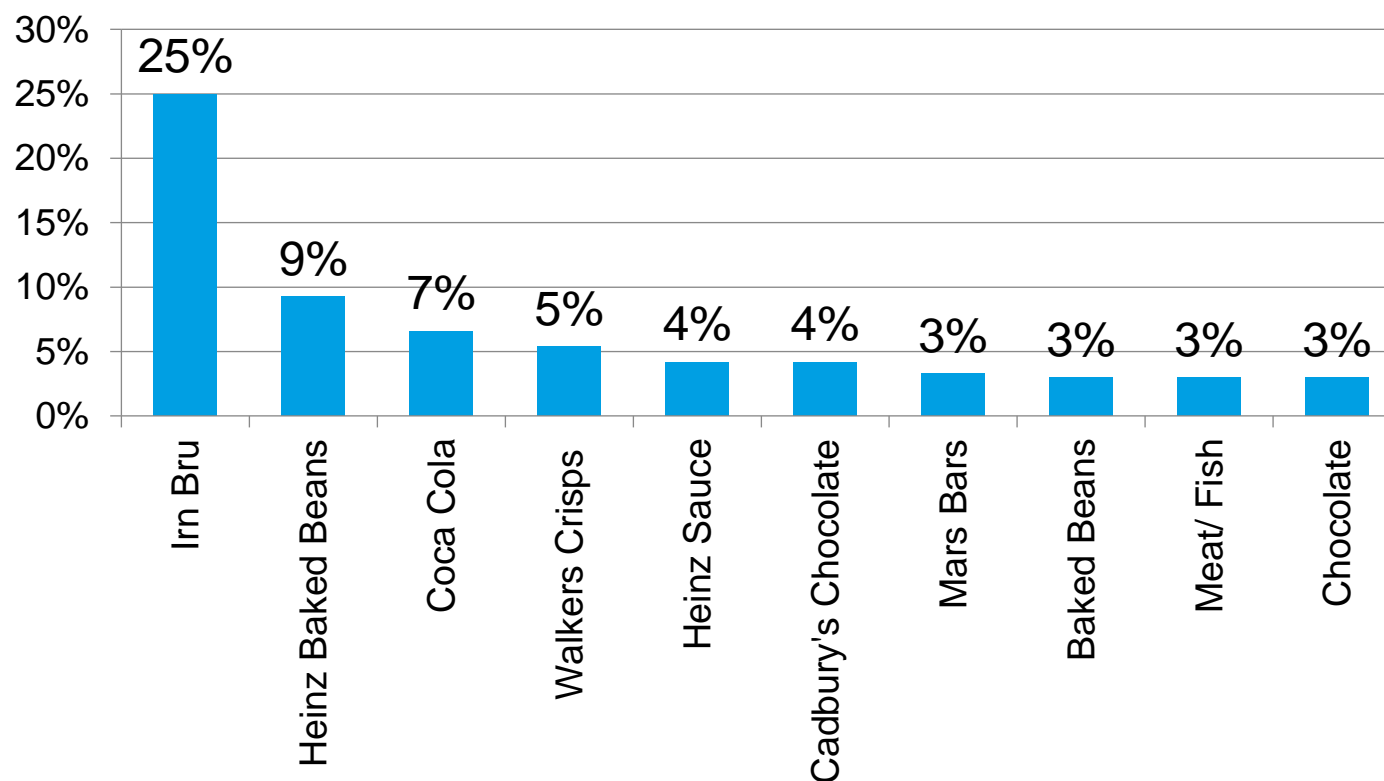
- A third of Scottish adults are aware of a product that has been reformulated.
- 87% of products were already being purchased 13% were not being purchased at the time of reformulation.





# Awareness of Reformulated products

Irn Bru has the highest awareness of a brand that has reformulated followed by Heinz products.



# Awareness of Reformulated products



Irn-Bru chose to cut sugar from 8.5 teaspoons to four in one go



Heinz used a health by stealth approach, very gradually reducing salt and sugar since 1985. Making such gradual changes has meant that changes were less noticeable to consumers. Notably the changes were also not communicated overtly to the consumer.

# Buying Behaviour After Reformulation, If they Were Buying Before

**44%**

I have continued to buy it in the same quantities since the reformulation/recipe change.

**21%**

I have continued to buy it, but buy it less due to the reformulation/recipe change

**18%**

I have stopped buying it because of the reformulation/recipe change

**10%**

I have continued to buy it, but buy it more due to the reformulation/recipe change

**7%**

I have changed the amount I buy of this product due to other reasons which are nothing to do with the reformulation/recipe change

- 54% of products that were reformulated have continued to be bought in the same amount or more since reformulation.
- 39% have been purchased less or not at all

And which of the following statements best reflects what you did following the product's reformulation (recipe change) to reduce, fat, salt or sugar? Base: 80,  
And which of the following statements best reflects what you did following the product's reformulation (recipe change) to reduce, fat, salt or sugar? Base: 555

# Buying Behaviour After Reformulation, If they Were Not Buying Before

**45%**

I started to buy it after the reformulation and have continued to buy it

**36%**

I tried it for the first time after the reformulation but did not buy it again

**19%**

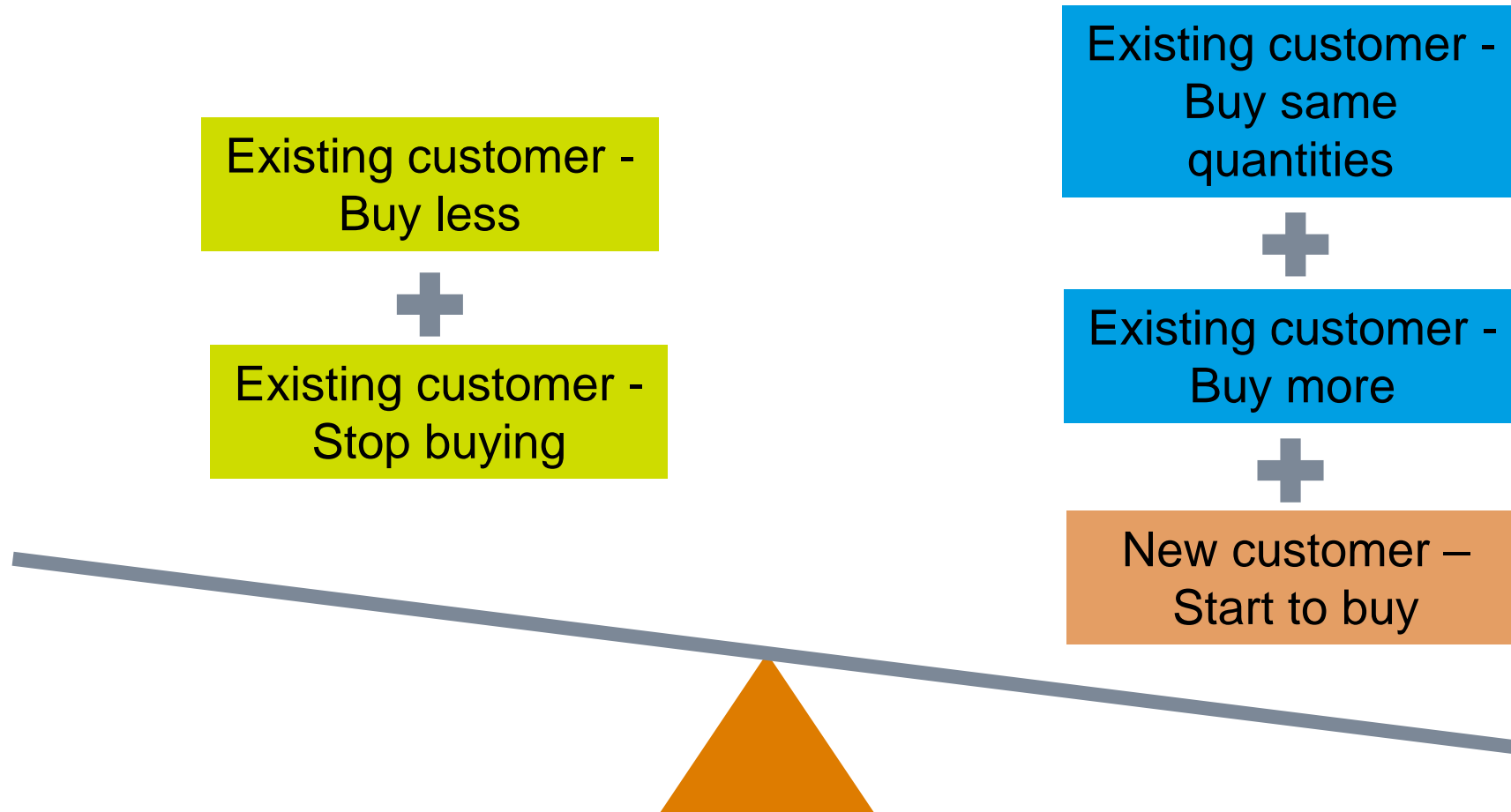
I tried it or started to buy it for reasons other than the reformulation/recipe change

- Nearly half of those who started to buy a product after reformulation, did so specifically because it had been reformulated to reduce fat, salt or sugar.

And which of the following statements best reflects what you did following the product's reformulation (recipe change) to reduce, fat, salt or sugar? Base: 80, And which of the following statements best reflects what you did following the product's reformulation (recipe change) to reduce, fat, salt or sugar? Base: 555

# Buying Behaviour After Reformulation

- On balance the research suggests that there is a positive net impact on sales from reformulation



# Awareness of Reformulation

- Just over two-thirds of Scottish adults support the initiative
- Scottish consumers say that they want to be informed of reformulation or a reduction in portion size. Not doing so could result in negative perceptions if not managed carefully.
- Reformulation is the preferred route. Few support a reduction on portion sizes.
- The research suggests that communicating reformulation is likely to result in some existing customer attrition but will be offset by the recruitment of new buyers.



# Reformulating Bakery



**Consumer Awareness & Perceptions of Healthier products**

# Perceptions of Bakery Companies/Brands if Reformulated

- There is a net positive impact on the perception of companies who reformulate

	I would think more positively of the company	I would think more negatively of the company	My perceptions of the company/ brand wouldn't change	Don't know it would depend
Savoury Bakery	38% (+28)	10%	38%	14%
Sweet Bakery	37% (+24)	13%	35%	15%

Thinking about the brands/companies you normally buy each of the types of food from, if they reformulated products (changed the recipe) to reduce the sugar, salt, fat and/or calories in their products, how would this influence your perception of them? - Base: Mixed, purchased product in last 3 months

Key:  
Net positive or  
negative effect



# Potential Impact on Sales if Bakery Companies/Brands if Reformulated

- Reformulation should have limited impact on sales

	I would be likely to buy more	I would be likely to buy less	I would buy the same amount	Don't know it would depend
Savoury Bakery	14% (+3)	11%	59%	16%
Sweet Bakery	14% (-1)	15%	54%	17%

Thinking about the brands/companies you normally buy each of the types of food from, if they reformulated products (changed the recipe) to reduce the sugar, salt, fat and/or calories in their products, how do you think it would influence the amount you would buy from them? Base: Mixed purchased product in last 3 months

Key:  
Net positive or  
negative effect

# Sweet Foods: Top 5 Things Considered in Deciding Whether to Continue Buying Following Reformulation



However this will be principally dependent on the overall taste of the reformulated product and the price (i.e. no price increase)

And if the brands/companies you normally buy each of these types of food from, reformulated products (changed the recipe) to reduce the sugar, salt, fat and/or calories in their products, what are the top things you would consider in deciding whether to continue buying their products? Sweet foods E.g. sweet bakery, yoghurt, ice-cream, confectionery or biscuits & cereal bars - Base: 982

# Appeal of food brands/companies reformulating products to increase the amount of fibre in them

- In the bakery category there is comparatively strong appeal for products to be reformulated to increase the fibre content.

	Very Appealing	Appealing	Neutral	Unappealing	Very Unappealing
Savoury Bakery	8%	37%	42%	7%	6%
Sweet Bakery	7%	31%	44%	10%	7%

# Appeal of food brands/companies reformulating products to increase the amount of fibre in them

- Awareness of companies already reformulating or introducing new products for this purpose in bakery could be supporting this.



In 2016 M&S reformulated its loaves of bread and rolls so each has a minimum of 3g of fibre per 100g. This enabled it to communicate a positive health benefit to consumers on the front of pack.



A range of bread brands now offer half and half style loaves.

# Perceptions of Bakery Companies/Brands if Reduced Portion Sizes to Support Health

- The research suggests that there may be a negative impact on the perception of companies who reduce portion sizes to reduce sugar, salt fat and/or calories.

	I would think more positively of the company	I would think more negatively of the company	My perceptions of the company/ brand wouldn't change	Don't know it would depend
Savoury Bakery	13% (-27)	40%	31%	17%
Sweet Bakery	13% (-25)	38%	33%	17%

And thinking about the brands/companies you normally buy each of the types of food from, if they reduced the portion size to reduce the sugar, salt, fat and/or calories in their products, how would this influence your perception of them? Base: Mixed purchased product in last 3 months

Key:  
Net positive or  
negative effect

# Potential Impact on Sales if Bakery Companies/ Brands Reduced Portion Sizes to Support Health

- There could be a negative impact on sales, if not managed carefully.

	I would be likely to buy more	I would be likely to buy less	I would buy the same amount	Don't know it would depend
Savoury Bakery	9% (-20)	29%	42%	20%
Sweet Bakery	10% (-20)	30%	41%	19%

Thinking about the brands/companies you normally buy each of the types of food from, if they reduced the portion size to reduce the sugar, salt, fat and/or calories in their products, how do you think it would influence the amount you would buy from them? Base: Mixed purchased product in last 3 months

Key:  
Net positive or  
negative effect

# Reasons Why Would Buy Less if Reduction in Portions Size

- A feeling that companies/brands would still keep prices the same whilst reducing portion sizes was overwhelmingly the reason why buyers were resistant to this solution.

They are bound to raise or keep price the same and that is not right

Because they wouldn't reduce the cost, so you get less for your money!

If they don't also reduce their prices to compensate for the smaller size, then their reputation would be damaged

Reduced portion for this same or even higher price No thank you

You could be paying the same price for smaller portions

Company just out to boost their profits under the guise of so-called healthy eating.



# Reformulating Dairy



**Consumer Awareness & Perceptions of Healthier products**



# Perceptions of Dairy Companies/Brands if Reformulated

- There is a net positive impact on the perception of companies who reformulate

	I would think more positively of the company	I would think more negatively of the company	My perceptions of the company/ brand wouldn't change	Don't know it would depend
Cheese	34% (+24)	11%	39%	16%
Ice Cream	35% (+24)	11%	39%	15%
Yoghurt	36% (+28)	8%	41%	15%

Thinking about the brands/companies you normally buy each of the types of food from, if they reformulated products (changed the recipe) to reduce the sugar, salt, fat and/or calories in their products, how would this influence your perception of them?  
Base: Mixed purchased product in last 3 months

Key:  
Net positive or  
negative effect

# Potential Impact on Sales if Dairy Companies/Brands if Reformulated

- Reformulation could result in a positive impact on sales

	I would be likely to buy more	I would be likely to buy less	I would buy the same amount	Don't know it would depend
Cheese	14% (+5)	9%	62%	16%
Ice Cream	16% (+5)	11%	55%	18%
Yoghurt	17% (+10)	7%	61%	15%

Thinking about the brands/companies you normally buy each of the types of food from, if they reformulated products (changed the recipe) to reduce the sugar, salt, fat and/or calories in their products, how do you think it would influence the amount you would buy from them? Base: Mixed purchased product in last 3 months

Key:  
Net positive or  
negative effect

# Sweet Foods: Top 5 Things Considered in Deciding Whether to Continue Buying Following Reformulation

- 87% Overall Taste
- 52% Price
- 40% Healthiness of replacement ingredients
- 24% Texture
- 21% Maintained Level of Sweetness



However this will be principally dependent on the overall taste of the reformulated product and the price (i.e. no price increase)

And if the brands/companies you normally buy each of these types of food from, reformulated products (changed the recipe) to reduce the sugar, salt, fat and/or calories in their products, what are the top things you would consider in deciding whether to continue buying their products? Sweet foods  
E.g. sweet bakery, yoghurt, ice-cream, confectionery or biscuits & cereal bars - Base: 982

# Appeal of food brands/companies reformulating products to increase the amount of fibre in them

- Although some buyers support reformulation of products in this category to increase the fibre content, an equal number are resistant.
- Appeal is slightly higher for yoghurts, where products are already marketed on digestive health.

	Very Appealing	Appealing	Neutral	Unappealing	Very Unappealing
Cheese	7%	25%	45%	15%	11%
Ice Cream	6%	21%	45%	16%	12%
Yoghurt	8%	25%	44%	14%	10%

How appealing would you find the following...Food brands/companies you currently buy products from, reformulating products to increase the amount of fibre in them. Base: Mixed purchased product in last 3 months

# Appeal of food brands/companies reformulating products to increase the amount of fibre in them



**Some yoghurts are already positioned as promoting digestive health, thus consumers may more readily associate with the category.**



**Products in the high protein, lower calorie ice-cream category typically have higher fibre than 'standard' ice-creams, but are not marketed as doing so.**

# Perceptions of Dairy Companies/Brands if Reduced Portion Sizes to Support Health

- The research suggests that there may be a negative impact on the perception of companies who reduce portion sizes to reduce sugar, salt fat and/or calories.

	I would think more positively of the company	I would think more negatively of the company	My perceptions of the company/ brand wouldn't change	Don't know it would depend
Cheese	13% (-25)	38%	32%	17%
Ice Cream	15% (-23)	38%	32%	16%
Yoghurt	14% (-23)	37%	33%	16%

And thinking about the brands/companies you normally buy each of the types of food from, if they reduced the portion size to reduce the sugar, salt, fat and/or calories in their products, how would this influence your perception of them? Base: Mixed purchased product in last 3 months

# Potential Impact on Sales if Dairy Companies/ Brands Reduced Portion Sizes to Support Health

- This could result in a negative impact on sales, if not managed carefully.

	I would be likely to buy more	I would be likely to buy less	I would buy the same amount	Don't know it would depend
Cheese	12% (-13)	25%	45%	18%
Ice Cream	12% (-13)	25%	43%	20%
Yoghurt	11% (-14)	25%	46%	19%

Thinking about the brands/companies you normally buy each of the types of food from, if they reduced the portion size to reduce the sugar, salt, fat and/or calories in their products, how do you think it would influence the amount you would buy from them? Base: Mixed purchased product in last 3 months



# Reasons Why Would Buy Less if Reduction in Portions Size

- A feeling that companies/brands would still keep prices the same whilst reducing portion sizes was overwhelmingly the reason why buyers were resistant to this solution.

Buy for size of product and value for money

Smaller portion does not mean healthier. If I was to get smaller portions I may eat double the product.

They do not do anything to change the product itself, just the portion size, which does not make sense to me. It seems like they just want to make more money and appear as if they do something to make their products "healthier"

I feel it is unfair as they would not reduce pricing

Could be a hidden price increase

I suspect the price would not reduce in line with reduction in portion size



# Reformulating Sweets & Biscuits



**Consumer Awareness & Perceptions of Healthier products**

# Perceptions of Confectionery, Biscuits & Cereal Bar Companies/Brands if Reformulated

- There is a net positive impact on the perception of companies who reformulate

	I would think more positively of the company	I would think more negatively of the company	My perceptions of the company/brand wouldn't change	Don't know it would depend
Confectionery	39% (+27)	12%	34%	15%
Biscuits & Cereal Bars	39% (+29)	10%	36%	15%

Thinking about the brands/companies you normally buy each of the types of food from, if they reformulated products (changed the recipe) to reduce the sugar, salt, fat and/or calories in their products, how would this influence your perception of them?

Base: Mixed purchased product in last 3 months

Key:  
Net positive or  
negative effect

# Potential Impact on Sales if Confectionery, Biscuits & Cereal Bar Companies/Brands if Reformulated

- On balance reformulation could result in a positive impact on sales

	I would be likely to buy more	I would be likely to buy less	I would buy the same amount	Don't know it would depend
Confectionery	16% (+2)	14%	53%	17%
Biscuits & Cereal Bars	17% (+5)	12%	55%	16%

Thinking about the brands/companies you normally buy each of the types of food from, if they reformulated products (changed the recipe) to reduce the sugar, salt, fat and/or calories in their products, how do you think it would influence the amount you would buy from them? Base: Mixed purchased product in last 3 months

Key:  
Net positive or  
negative effect

# Sweet Foods: Top 5 Things Considered in Deciding Whether to Continue Buying Following Reformulation

87% Overall Taste

52% Price

40% Healthiness of replacement ingredients

24% Texture

21% Maintained Level of Sweetness



**However this will be principally dependent on the overall taste of the reformulated product and the price (i.e. no price increase)**

And if the brands/companies you normally buy each of these types of food from, reformulated products (changed the recipe) to reduce the sugar, salt, fat and/or calories in their products, what are the top things you would consider in deciding whether to continue buying their products? Sweet foods E.g. sweet bakery, yoghurt, ice-cream, confectionery or biscuits & cereal bars

# Appeal of food brands/companies reformulating products to increase the amount of fibre in them

- Whilst most buyers feel neutral, there is greater resistance to confectionery being reformulated to increase the fibre content.

	Very Appealing	Appealing	Neutral	Unappealing	Very Unappealing
Confectionery	7%	23%	47%	15%	10%
Biscuits & Cereal Bars	8%	32%	45%	9%	6%

How appealing would you find the following...Food brands/companies you currently buy products from, reformulating products to increase the amount of fibre in them. Base: Mixed purchased product in last 3 months

# Perceptions of Confectionery, Biscuits & Cereal Bar Companies/Brands if Reduced Portion Sizes to Support Health

- The research suggests that there may be a negative impact on the perception of companies who reduce portion sizes to reduce sugar, salt fat and/or calories.

	I would think more positively of the company	I would think more negatively of the company	My perceptions of the company/ brand wouldn't change	Don't know it would depend
Confectionery	14% (-24)	38%	32%	17%
Biscuits & Cereal Bars	14% (-23)	37%	32%	17%

And thinking about the brands/companies you normally buy each of the types of food from, if they reduced the portion size to reduce the sugar, salt, fat and/or calories in their products, how would this influence your perception of them? Base: Mixed purchased product in last 3 months

Key:  
Net positive or  
negative effect

# Potential Impact on Sales if Confectionery, Biscuits & Cereal Bar Companies/Brands Reduced Portion Sizes to Support Health

- There could be a negative impact on sales, if not managed carefully.

	I would be likely to buy more	I would be likely to buy less	I would buy the same amount	Don't know it would depend
Confectionery	12% (-17)	29%	41%	19%
Biscuits & Cereal Bars	11% (-17)	28%	42%	19%

Thinking about the brands/companies you normally buy each of the types of food from, if they reduced the portion size to reduce the sugar, salt, fat and/or calories in their products, how do you think it would influence the amount you would buy from them? Base: Mixed purchased product in last 3 months

Key:  
Net positive or  
negative effect

# Reasons Why Would Buy Less if Reduction in Portions Size

- A feeling that companies/brands would still keep prices the same whilst reducing portion sizes was overwhelmingly the reason why buyers were resistant to this solution.

'cos no doubt the prices will stay the same

They would keep the price the same so shopping would be more expensive as you would need to buy more of the product

If every company did it, I probably would have to buy something but overall, I'd be annoyed about it and would probably go for other brands.

A quick, cheap fix to keep profits the same.

Annoyed that chocolate bars are reducing constantly in size & same price or higher charged.

They almost certainly wouldn't reduce the cost



# Reformulating Butchery



**Consumer Awareness & Perceptions of Healthier products**

# Perceptions of Butchery & Meat Product Companies/ Brands if Reformulated

- There is a net positive impact on the perception of companies who reformulate

	I would think more positively of the company	I would think more negatively of the company	My perceptions of the company/ brand wouldn't change	Don't know it would depend
Fresh meat	31% (+22)	9%	44%	16%
Fresh processed meat	38% (+30)	8%	39%	15%
Cooked meat	39% (+31)	8%	39%	15%
Pastry based meat pies, quiches & pasties	36% (+27)	9%	40%	15%
Meat snacks	36% (+26)	10%	38%	16%

Thinking about the brands/companies you normally buy each of the types of food from, if they reformulated products (changed the recipe) to reduce the sugar, salt, fat and/or calories in their products, how would this influence your perception of them? Base: Mixed purchased product in last 3 months

**Key:**  
Net positive or negative effect

# Potential Impact on Sales Butchery & Meat Product Companies/ Brands if Reformulated

- Reformulation could result in a positive impact on sales

	I would be likely to buy more	I would be likely to buy less	I would buy the same amount	Don't know it would depend
Fresh meat	13% (+6)	7%	64%	15%
Fresh processed meat	13% (+6)	7%	62%	18%
Cooked meat	14% (+6)	8%	62%	16%
Pastry based meat pies, quiches & pasties	14% (+3)	11%	58%	17%
Meat snacks	13% (+2)	11%	56%	19%

Thinking about the brands/companies you normally buy each of the types of food from, if they reformulated products (changed the recipe) to reduce the sugar, salt, fat and/or calories in their products, how do you think it would influence the amount you would buy from them? Base: Mixed purchased product in last 3 months

Key:  
Net positive or  
negative effect

# Top 5 Things Considered in Deciding Whether to Continue Buying Following Reformulation (Meat)



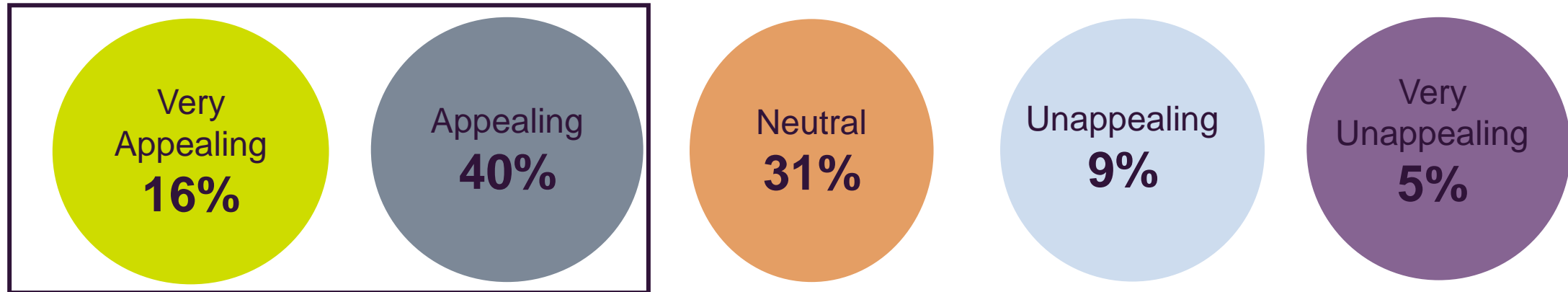
**Acceptability will be principally dependent on the overall taste of the reformulated product and the price (i.e. no price increase)**

And if the brands/companies you normally buy each of these types of food from, reformulated products (changed the recipe) to reduce the sugar, salt, fat and/or calories in their products, what are the top things you would consider in deciding whether to continue buying their products? Meat products e.g. fresh meat (raw), fresh processed meat (raw), cooked meat, meat snacks, pastry-based meat pies, quiches & pasties



# Appeal of food brands/companies reformulating products to increase the amount of vegetables in them

## Pre-prepared meals or meat pies, quiches or pasties



- Just over half of those buying pre-prepared meals or meat pies, quiches or pasties would find the addition of extra vegetables appealing.
- This correlates with healthy eating goals, 54% of Scottish adults actively trying to eat more vegetables

And how appealing would you find...Food brands/companies you currently buy pre-prepared meals or meat pies, quiches or pasties from, reformulating products to increase the amount of vegetables in them?

# Appeal of food brands/companies reformulating products to increase the amount of fibre in them

- There is less appeal for meat products in their simplest form to have added fibre in them (e.g. raw meat).

	Very Appealing	Appealing	Neutral	Unappealing	Very Unappealing
Fresh Meat	6%	21%	48%	14%	11%
Fresh processed Meat	6%	24%	49%	13%	8%
Cooked meat	6%	24%	47%	15%	9%
Pastry based meat pies, quiches & pasties	6%	30%	46%	10%	9%
Meat snacks	7%	29%	48%	8%	8%

How appealing would you find the following...Food brands/companies you currently buy products from, reformulating products to increase the amount of fibre in them.  
Base: Mixed purchased product in last 3 months

# Examples of fibre or vegetables added to meat



**Tesco & Sainsbury's have introduced a limited range of mince based products incorporating vegetables**



# Perceptions of Butchery & Meat Product Companies/ Brands if Reduced Portion Sizes to Support Health

- The research suggests that there may be a negative impact on the perception of companies who reduce portion sizes to reduce sugar, salt fat and/or calories.

	I would think more positively of the company	I would think more negatively of the company	My perceptions of the company/ brand wouldn't change	Don't know it would depend
Fresh Meat	12% (-27)	39%	32%	17%
Fresh processed Meat	13% (-27)	39%	31%	17%
Cooked meat	12% (-26)	38%	34%	16%
Pastry based meat pies, quiches & pasties	14% (-24)	38%	32%	16%
Meat snacks	13% (-25)	38%	33%	16%

And thinking about the brands/companies you normally buy each of the types of food from, if they reduced the portion size to reduce the sugar, salt, fat and/or calories in their products, how would this influence your perception of them? Base: Mixed purchased product in last 3 months

Key:  
Net positive or  
negative effect

# Potential Impact on Sales if Butchery & Meat Product Companies/Brands Reduced Portion Sizes to Support Health

- There could be a negative impact on sales, if not managed carefully.

	I would be likely to buy more	I would be likely to buy less	I would buy the same amount	Don't know it would depend
Fresh Meat	12% (-13)	25%	44%	19%
Fresh processed Meat	10% (-17)	27%	42%	21%
Cooked meat	11% (-14)	25%	45%	20%
Pastry based meat pies, quiches & pasties	11% (-18)	29%	42%	18%
Meat snacks	12% (-15)	27%	41%	21%

Thinking about the brands/companies you normally buy each of the types of food from, if they reduced the portion size to reduce the sugar, salt, fat and/or calories in their products, how do you think it would influence the amount you would buy from them? Base: Mixed purchased product in last 3 months

Key:  
Net positive or  
negative effect

# Reasons Why Would Buy Less if Reduction in Portions Size

- A feeling that companies/brands would still keep prices the same whilst reducing portion sizes was overwhelmingly the reason why buyers were resistant to this solution.

I but these foods  
for lunch or dinner  
and they would  
not be filling  
enough

Because they wouldn't  
reduce the cost, so you  
get less for your money!

Would feel like I  
consumed less  
protein

I would still be  
hungry

It would just be a rip  
off to use less  
ingredients but  
charge same or more

Don't like getting  
charged the  
same for less

I would think it would  
be another way to pay  
more

# Reformulating Ready Meals & Pizza



**Consumer Awareness & Perceptions of Healthier products**

# Perceptions of Ready Meals & Pizza Companies/Brands if Reformulated

- There is a net positive impact on the perception of companies who reformulate

	I would think more positively of the company	I would think more negatively of the company	My perceptions of the company/ brand wouldn't change	Don't know it would depend
Prepared meals & pizza	43% (+36)	7%	35%	15%

Thinking about the brands/companies you normally buy each of the types of food from, if they reformulated products (changed the recipe) to reduce the sugar, salt, fat and/or calories in their products, how would this influence your perception of them?

Base: Mixed purchased product in last 3 months

Key:  
Net positive or  
negative effect

# Potential Impact on Sales if Ready Meals & Pizza Companies/ Brands if Reformulated

- Reformulation could result in a positive impact on sales

	I would be likely to buy more	I would be likely to buy less	I would buy the same amount	Don't know it would depend
Prepared meals & pizza	19% (+9)	10%	53%	18%

Thinking about the brands/companies you normally buy each of the types of food from, if they reformulated products (changed the recipe) to reduce the sugar, salt, fat and/or calories in their products, how do you think it would influence the amount you would buy from them? Base: Mixed purchased product in last 3 months

Key:  
Net positive or  
negative effect



# Top 5 Things Considered in Deciding Whether to Continue Buying Following Reformulation



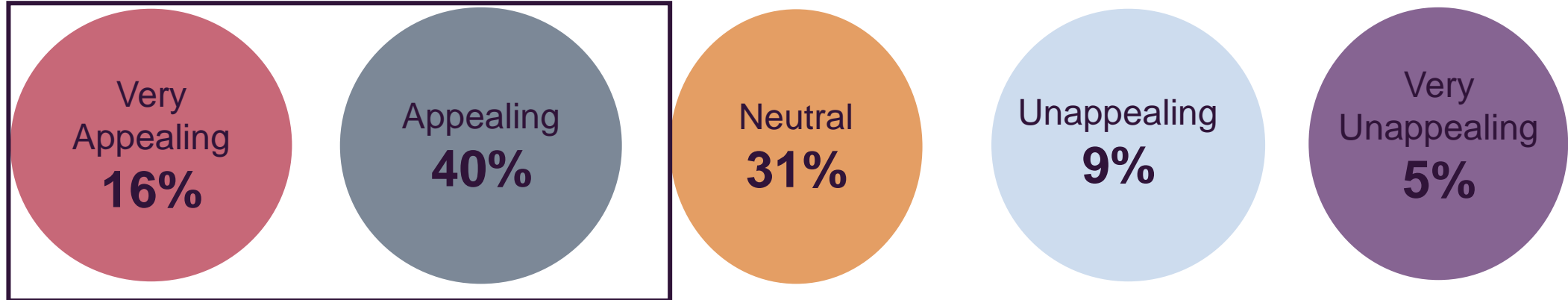
**Success will be principally dependent on the overall taste of the reformulated product and the price (i.e. no price increase)**

And if the brands/companies you normally buy each of these types of food from, reformulated products (changed the recipe) to reduce the sugar, salt, fat and/or calories in their products, what are the top things you would consider in deciding whether to continue buying their products? Savoury foods E.g. bakery, vegetarian & vegan pastry-based savories, cheese, savoury snacking, prepared meals/pizza



# Appeal of food brands/companies reformulating products to increase the amount of vegetables in them

## Pre-prepared meals or meat pies, quiches or pasties



- Just over half of those buying pre-prepared meals or meat pies, quiches or pasties would find the addition of extra vegetables appealing.
- This correlates with healthy eating goals, 54% of Scottish adults actively trying to eat more vegetables

And how appealing would you find...Food brands/companies you currently buy pre-prepared meals or meat pies, quiches or pasties from, reformulating products to increase the amount of vegetables in them?

# Appeal of food brands/companies reformulating products to increase the amount of fibre in them

- Few buyers of ready meals and pizza would find the addition of extra fibre unappealing.
- A sizable proportion would find this addition appealing/very appealing

	Very Appealing	Appealing	Neutral	Unappealing	Very Unappealing
Prepared meals & pizza	10%	30%	46%	9%	5%

How appealing would you find the following...Food brands/companies you currently buy products from, reformulating products to increase the amount of fibre in them. Base: Mixed purchased product in last 3 months

# Perceptions of Prepared Meals & Pizza Companies/ Brands if Reduced Portion Sizes to Support Health

- The research suggests that there may be a negative impact on the perception of companies who reduce portion sizes to reduce sugar, salt fat and/or calories.

	I would think more positively of the company	I would think more negatively of the company	My perceptions of the company/ brand wouldn't change	Don't know it would depend
Prepared meals & pizza	15% (-21)	36%	32%	17%

And thinking about the brands/companies you normally buy each of the types of food from, if they reduced the portion size to reduce the sugar, salt, fat and/or calories in their products, how would this influence your perception of them? Base: Mixed purchased product in last 3 months

Key:  
Net positive or  
negative effect

# Potential Impact on Sales if Prepared Meals & Pizza Companies/ Brands Reduced Portion Sizes to Support Health



- There could be a negative impact on sales, if not managed carefully.

	I would be likely to buy more	I would be likely to buy less	I would buy the same amount	Don't know it would depend
Prepared meals & pizza	12% (-14)	26%	41%	21%

Thinking about the brands/companies you normally buy each of the types of food from, if they reduced the portion size to reduce the sugar, salt, fat and/or calories in their products, how do you think it would influence the amount you would buy from them? Base: Mixed purchased product in last 3 months

Key:  
Net positive or  
negative effect

# Reasons Why Would Buy Less if Reduction in Portions Size

- A feeling that companies/brands would still keep prices the same whilst reducing portion sizes was overwhelmingly the reason why buyers were resistant to this solution.

Not ethical thing  
to do

Portions size would  
reduce but price inevitably  
would not

The price would  
stay the same or  
go up

They would  
probably keep the  
price the same

Reducing portion  
size only misleads

Meal too small to  
satisfy hunger and  
no price reduction

Pizza shouldn't be  
changed as it is a  
treat often to share  
with others

# Reformulating Savouries



**Consumer Awareness & Perceptions of Healthier products**

# Perceptions of Savoury Product Companies/Brands if Reformulated

- There is a net positive impact on the perception of companies who reformulate

	I would think more positively of the company	I would think more negatively of the company	My perceptions of the company/ brand wouldn't change	Don't know it would depend
Savoury Snacks e.g. crisps	41% (+31)	10%	35%	14%
Vegetarian & vegan pastry-based savouries	44% (+36)	8%	38%	11%

Thinking about the brands/companies you normally buy each of the types of food from, if they reformulated products (changed the recipe) to reduce the sugar, salt, fat and/or calories in their products, how would this influence your perception of them? Base: Mixed purchased product in last 3 months

Key:  
Net positive or  
negative effect



# Potential Impact on Sales if Savoury Product Companies/Brands if Reformulated

- On balance reformulation could result in a positive impact on sales

	I would think more positively of the company	I would think more negatively of the company	My perceptions of the company/ brand wouldn't change	Don't know it would depend
Savoury Snacks e.g. crisps	17% (+6)	11%	56%	16%
Vegetarian & vegan pastry-based savouries	27% (+19)	8%	50%	15%

Thinking about the brands/companies you normally buy each of the types of food from, if they reformulated products (changed the recipe) to reduce the sugar, salt, fat and/or calories in their products, how do you think it would influence the amount you would buy from them? Base: Mixed purchased product in last 3 months

Key:  
Net positive or  
negative effect

# Top 5 Things Considered in Deciding Whether to Continue Buying Following Reformulation

84% Overall Taste

58% Price

38% Healthiness of replacement ingredients

28% Texture

17% Appearance



**Success will be principally dependent on the overall taste of the reformulated product and the price (i.e. no price increase)**

And if the brands/companies you normally buy each of these types of food from, reformulated products (changed the recipe) to reduce the sugar, salt, fat and/or calories in their products, what are the top things you would consider in deciding whether to continue buying their products? Savoury foods E.g. bakery, vegetarian & vegan pastry-based savories, cheese, savoury snacking, prepared meals/pizza

# Appeal of food brands/companies reformulating products to increase the amount of fibre in them

- There is overall support to for reformulating vegetarian & vegan based pastry savouries to increase the fibre in them.
- Consumers are more hesitant about savoury snacks such as crisps. Concerns about taste changes may be an issue.

	Very Appealing	Appealing	Neutral	Unappealing	Very Unappealing
Savoury Snacks e.g. crisps	8%	29%	46%	10%	17%
Vegetarian & vegan pastry- based savouries	13%	39%	38%	4%	6%

How appealing would you find the following...Food brands/companies you currently buy products from, reformulating products to increase the amount of fibre in them. Base: Mixed purchased product in last 3 months

# Perceptions of Savoury Product Companies/ Brands if Reduced Portion Sizes to Support Health

- The research suggests that there may be a negative impact on the perception of companies who reduce portion sizes to reduce sugar, salt fat and/or calories.

	I would think more positively of the company	I would think more negatively of the company	My perceptions of the company/ brand wouldn't change	Don't know it would depend
Savoury Snacks e.g. crisps	13% (-26)	39%	31%	17%
Vegetarian & vegan pastry-based savouries	18% (-14)	32%	34%	15%

And thinking about the brands/companies you normally buy each of the types of food from, if they reduced the portion size to reduce the sugar, salt, fat and/or calories in their products, how would this influence your perception of them? Base: Mixed purchased product in last 3 months

Key:  
Net positive or  
negative effect

# Potential Impact on Sales if Savoury Product Companies Reduced Portion Size to Support Health

- There could be a negative impact on sales, if not managed carefully.

	I would be likely to buy more	I would be likely to buy less	I would buy the same amount	Don't know it would depend
Savoury Snacks e.g. crisps	12% (-16)	28%	41%	19%
Vegetarian & vegan pastry-based savouries	16% (-12)	28%	39%	17%

Thinking about the brands/companies you normally buy each of the types of food from, if they reduced the portion size to reduce the sugar, salt, fat and/or calories in their products, how do you think it would influence the amount you would buy from them? Base: Mixed purchased product in last 3 months

Key:  
Net positive or  
negative effect

# Reasons Why Would Buy Less if Reduction in Portions Size

- A feeling that companies/brands would still keep prices the same whilst reducing portion sizes was overwhelmingly the reason why buyers were resistant to this solution.

I feel it is unfair as they would not reduce pricing

You're paying the same price for less

I would object to paying the same for less product

Wouldn't abide by portion size recommendation and continue eating as I do now

Unfair to the consumer

Wouldn't be worth the money

## In support of Reformulation

1. The majority of Scottish adults want to or are trying to have a healthy diet.
2. However, there is a disconnect between intentions & reality. Awareness of own diet is a key barrier.
3. As a result only a minority have made significant changes to what they eat...believing what they are eating to be meeting dietary guidelines.
4. A majority of Scottish adults support reformulation to make packaged or processed foods healthier. Due to a belief that this will benefit Scottish people/society.
5. The research suggests that on balance companies that reformulate with the specific aim of improving health will be seen more favourably by consumers and will not see a negative impact on sales.



## Areas of caution

1. Taste is the single most important thing determining product acceptance following reformulation. Suggesting that changes either need to be gradual so any changes in taste are less detectable or thoroughly tested before implementation.
2. Reformulation should also not be accompanied with a price increase.
3. Consumers indicate that they want to be informed on pack if a product is reformulation or reduced in portion size.
4. However, the research suggests that not informing the consumer will be more acceptable when making reformulation changes (particularly if performed very gradually as Heinz have done) than portion size reduction.
5. Reducing portion sizes to improve the healthiness of food is generally seen negatively, due to a belief that prices will not reduce proportionately thus will result in worse value for the consumer. Media coverage around shrinkflation no doubt supporting this view.

# Reformulation Challenge

Food & Drink Federation Scotland:

May 2020



**Levercliff**

Category Consultants to  
the Food & Drink Industry