Making Food Better Tracker Survey 2024

Report prepared for The Food Standards Agency

Date: February 2025

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Key findings at a glance

- A total of **611** interviews were completed between 16th September and 23rd November 2024 using Computer Assisted Personal Interviewing (CAPI). Quotas were set on gender, age, socio-economic group and region.
- Women (26%) have greater knowledge of their recommended daily calorie intake than men (13%), however, general awareness remains low among all consumers. The primary source of nutritional information for consumers is nutritional claims on the back of packaging (35%), however, 33% still disregard this information while shopping.
- Traffic light labelling is recognised by the majority of consumers (92%), but approximately half (49%) actively use the system when shopping for food. The main use of traffic light labelling includes assessing sugar, salt, and fat content in products, which is closely followed by checking calories and saturated fat content in products.
- Promotions continue to influence consumer purchasing behaviours, with around half (49%) more likely to buy chocolate confectionery, crisps and snacks if they are on promotion. The majority of consumers (83%) would like to see more promotions on fruit and vegetables, but only half (51%) say they would purchase them if they were on promotion.
- Consumers report difficulty choosing healthier food when eating out in locations such as takeaways (76%), fast-food restaurants (69%) and places of leisure such as cinemas (63%). More consumers (40%) report difficultly choosing healthier options in vending machines than last year (29%).

Executive summary

Key trends

- Although supermarkets continue to be the dominant location where consumers buy their food, independent stores and greengrocers continue to rise in popularity as an option for food shopping.
- In line with previous years, consumers find it more difficult to purchase healthier foods when eating out than when shopping in supermarkets.

- Use of the traffic light labelling system remains high for consumers, however the frequency of consumers using the system has steadily decreased since 2022.
- Similarly, there has been a decrease in consumers using this label when food shopping for their children compared to previous years.
- Consumers are more likely to purchase items that have reduced sugar, salt and fat than a reduction in portion size.

- Consumers have become less likely to say that they would like to see healthier options in various food settings compared to previous years.
- There has been a consistent decrease across recent years in the likelihood of consumers purchasing reformulated food alternatives with lower sugar, salt and fat.

Executive summary

Key demographic findings

Gender

- Women are more likely to recognise traffic light labels on foods compared to men (95% vs 89%) and are more likely to use them while shopping for food (53% vs 44%).
- Men are more likely to claim they do not want to see healthier products in food locations (37%), such as takeaways, restaurants etc, compared to women (28%).

Socio-economic background

- Lower socio-economic groups are more likely to agree that promotions on fruit and vegetables would motivate them to purchase these products (54%) compared to those from higher socio-economic groups (46%). However, higher socio-economic groups are more likely to report they would like to see more promotions on these products than those in a lower socio-economic group (87% vs 80%).

Age

- Consumers aged between 35-54 are more likely to do their food shopping at supermarkets (93% including online deliveries) compared to consumers aged 18-34 and 55+ (78% each).
- Consumers aged 18-34 (62%) and 35-54 (58%) are more likely to report they would not try to choose a healthier option when eating out compared to adults aged 55+ (43%).

Background & methodology

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Background

This report presents the findings from the Food Standards Agency's (FSA) 2024 Making Food Better (MFB) consumer tracker survey in Northern Ireland (NI). The FSA rebranded its Eating Well Choosing Better (EWCB) programme to MFB in 2023, however, the MFB consumer tracker is regarded as a continuation of the EWCB survey.

The survey collects and monitors robust data over time to support the delivery of the FSA's MFB Programme in NI.

Methodology

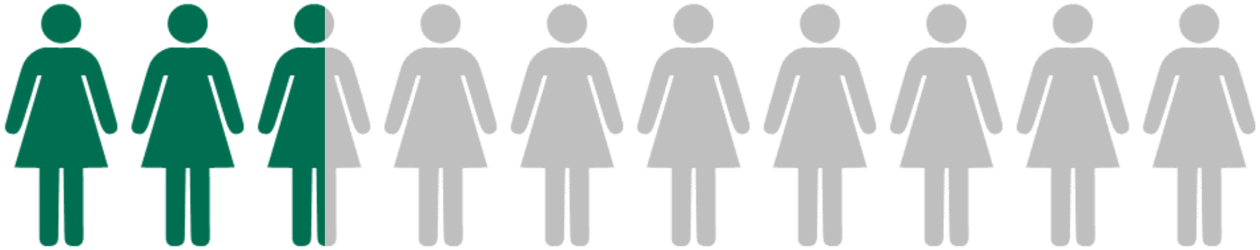
- All surveys were completed using Computer Assisted Personal Interviewing (CAPI) with adults in NI.
- A total of **611** interviews were completed between **16th September** and **23rd November** 2024.
- To ensure representation of the NI population, quota sampling was adopted. Quotas on gender, age, socio-economic group and region were derived from the latest Census 2021 population statistics (Census Office for Northern Ireland, 2021). In 2022, quotas were derived from the 2011 Census statistics.
- Corrective weighting was applied to the 2022, 2023 and 2024 data to adjust for imbalances in the sample demographic characteristic.

Results

Women have greater knowledge of their recommended daily calorie intake than men, whose awareness has fallen over time

K5a. What do you think the government-recommended daily calorie intake is for women?

26%



correctly identified the recommended daily calorie intake for their gender

Base: 310 adult women aged 18+ in Northern Ireland

K5b. What do you think the government-recommended daily calorie intake is for men?

13%

correctly identified the recommended daily calorie intake for their gender

Base: 301 adult men aged 18+ in Northern Ireland

Correct answer by gender over time:

Women

2022: 28%

2023: 25%

2024: 26%

Men

2022: 18%

2023: 15%

2024: 13%

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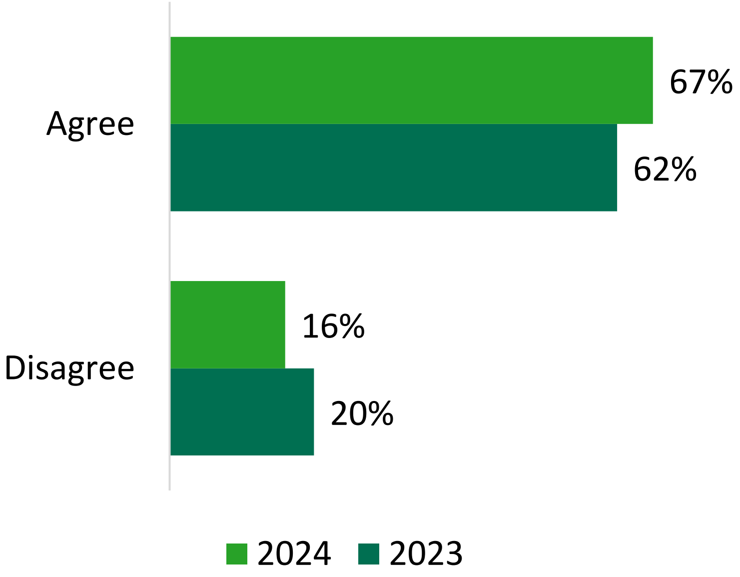
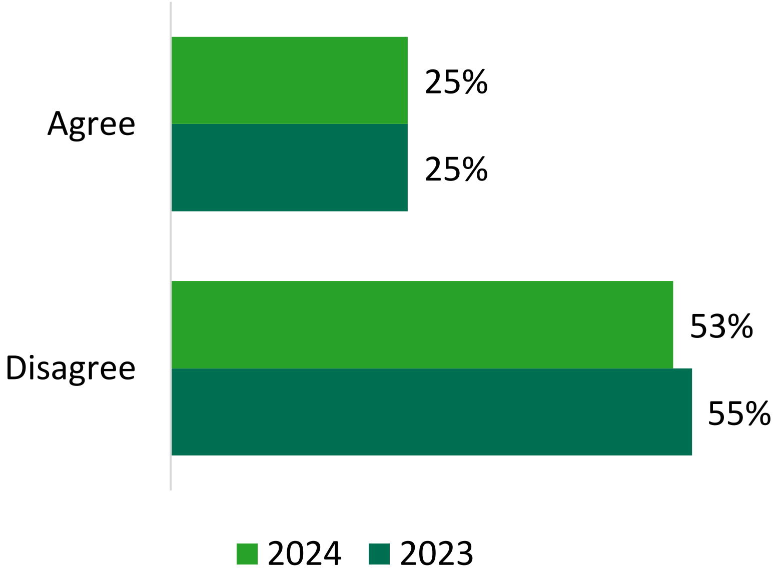
The majority of consumers choose healthier foods while shopping, however, more than half do not make healthier choices when eating out

K3. To what extent do you agree or disagree with these statements?

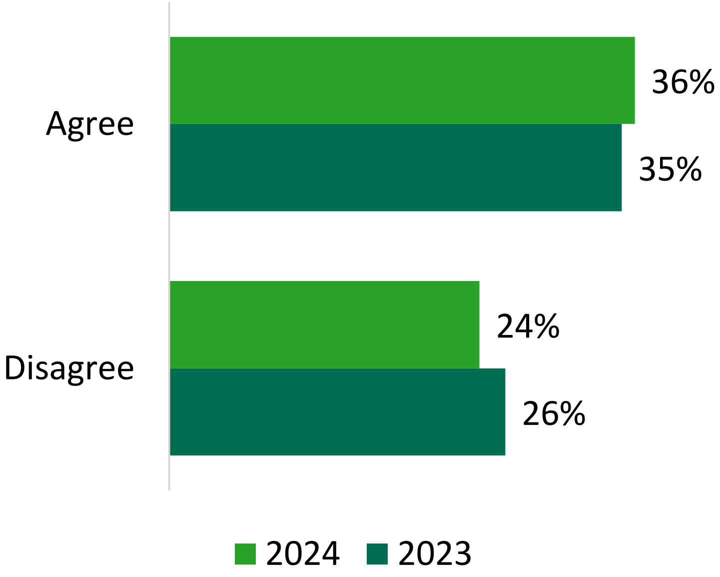
When shopping for food, I try to choose healthier versions of products



When eating out, I try to choose a healthier option from the menu



When eating out, I would like to see more healthier options on the menu



Base: 611 (2024), 601 (2023) adults in Northern Ireland aged 18+

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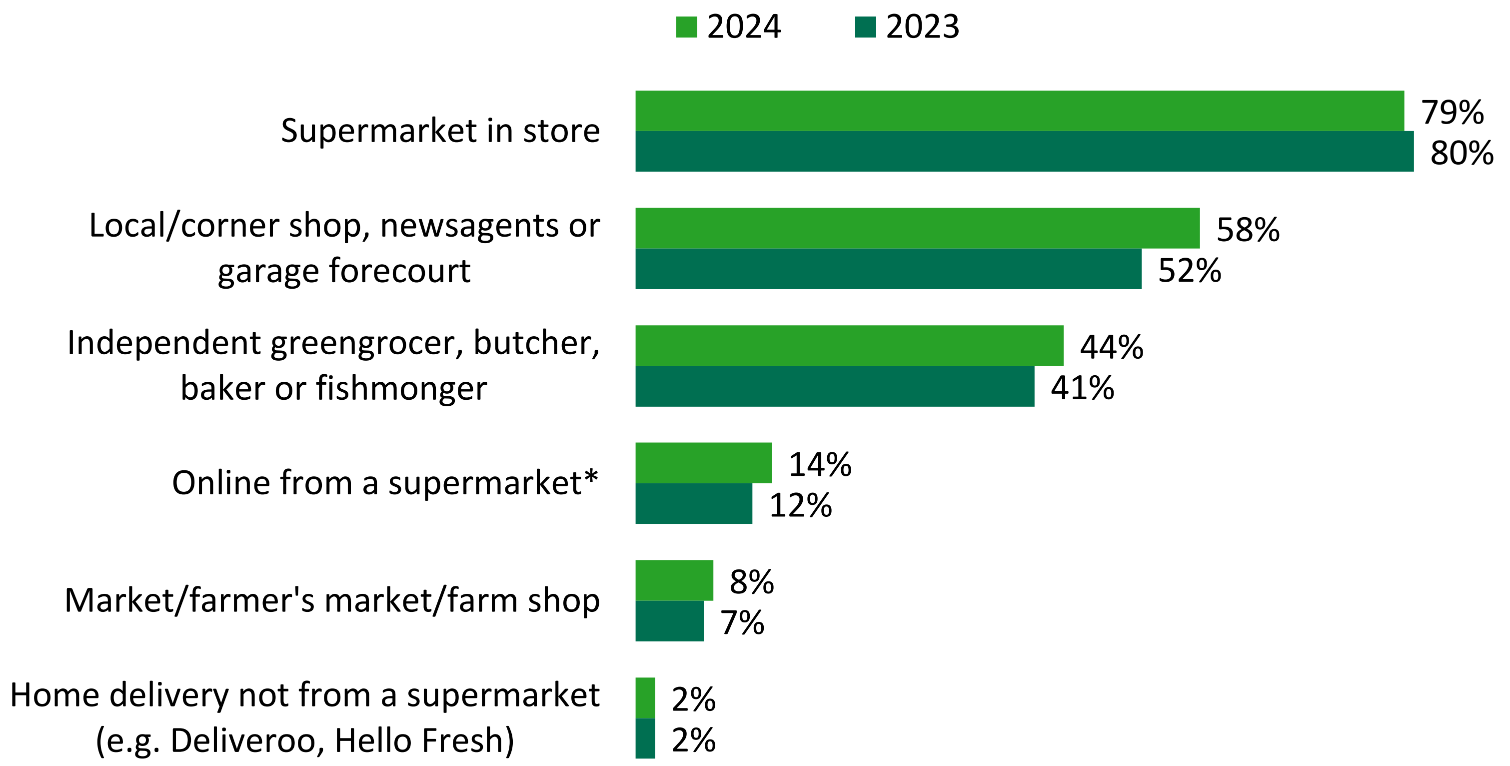
Most consumers shop for food in store at a supermarket – but independent stores are growing in popularity

B6ii. In a typical month, where do you shop for food?



Most consumers in NI continue to favour supermarkets as their primary food shopping source (79%), which remains at a similar level to 2023 (80%).

Whilst local / corner shops, newsagents, garage forecourt remain in second place, there is a clear positive trend for usage of independent greengrocers, butchers, bakers or fishmongers in the past three years.

Base: 2024 (611), 2023 (601) adults in Northern Ireland aged 18+

**Online from a supermarket includes home delivery and click & collect*

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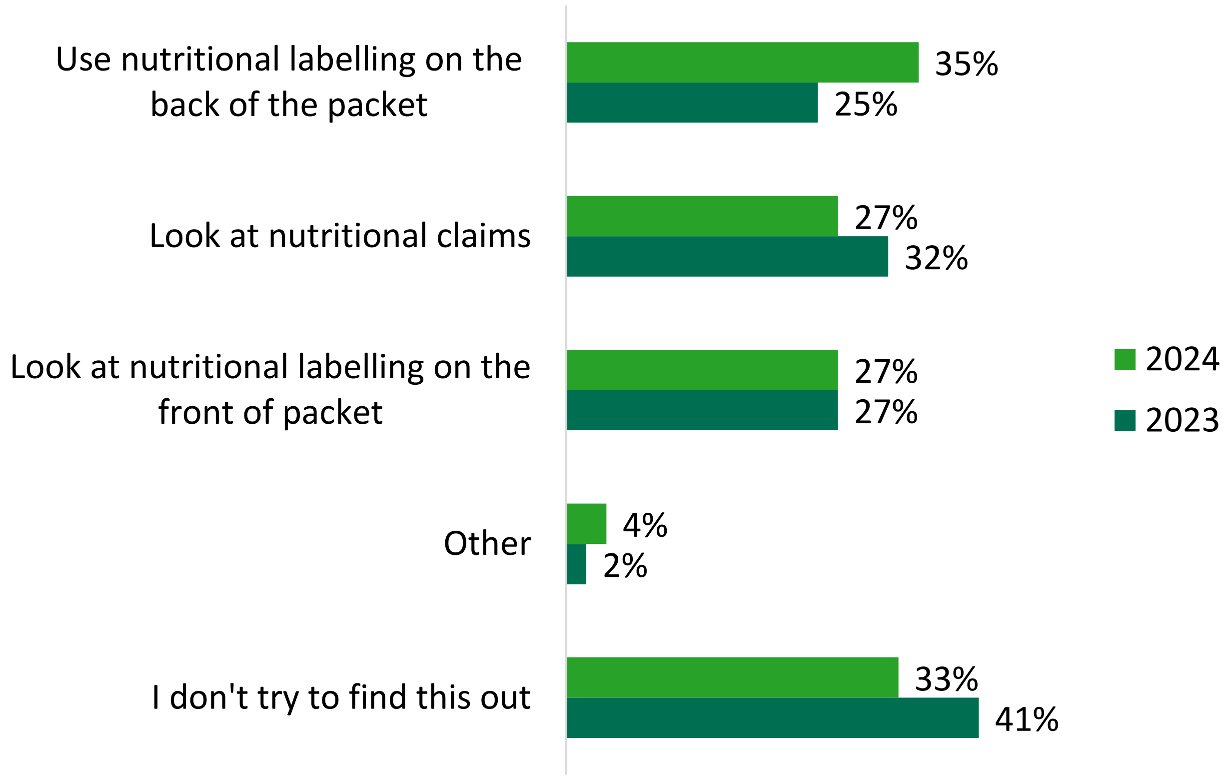
When shopping in store, consumers use a variety of information on packaging to find out the nutritional content of food

B1i How, if at all, do you tend to find out how much calories, saturated fat, sugar or salt are in a product when food shopping in store?



In 2023, nutritional claims on packets were the leading source of nutritional information of products cited by nearly a third (32%) of consumers, however in 2024 nutritional labelling on the back-of-pack became the primary source, which is a ten-percentage point rise from its 2023 level of 25%.

Consumers often check food labels for information on calories and nutrients content such as fat and sugar, typically presented in a table format.

Meanwhile, a third (33%) claim they do not look at this information on products when shopping in store, representing a decrease from the 41% reported in 2023.

Base: 2024 (598), 2023 (586) adults in Northern Ireland aged 18+ who shop in store

Although nine in ten consumers recognise the traffic light label, only around half use it when food shopping

B0. Do you recognise this traffic light image?

In 2024
92%
recognised the label

In 2023
93%
recognised the label

In 2022
91%
recognised the label

Base: 2024 (611), 2023 (601), 2022 (611) adults in Northern Ireland aged 18+

B0a. Do you use this when shopping for food?

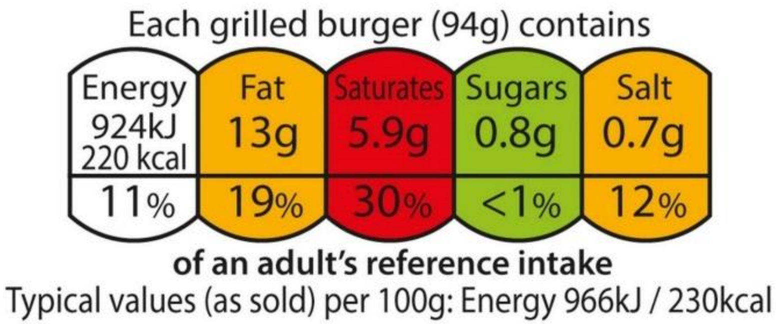
In 2024
49%
used the traffic light label

In 2023
43%
used the traffic light label

In 2022
45%
used the traffic light label

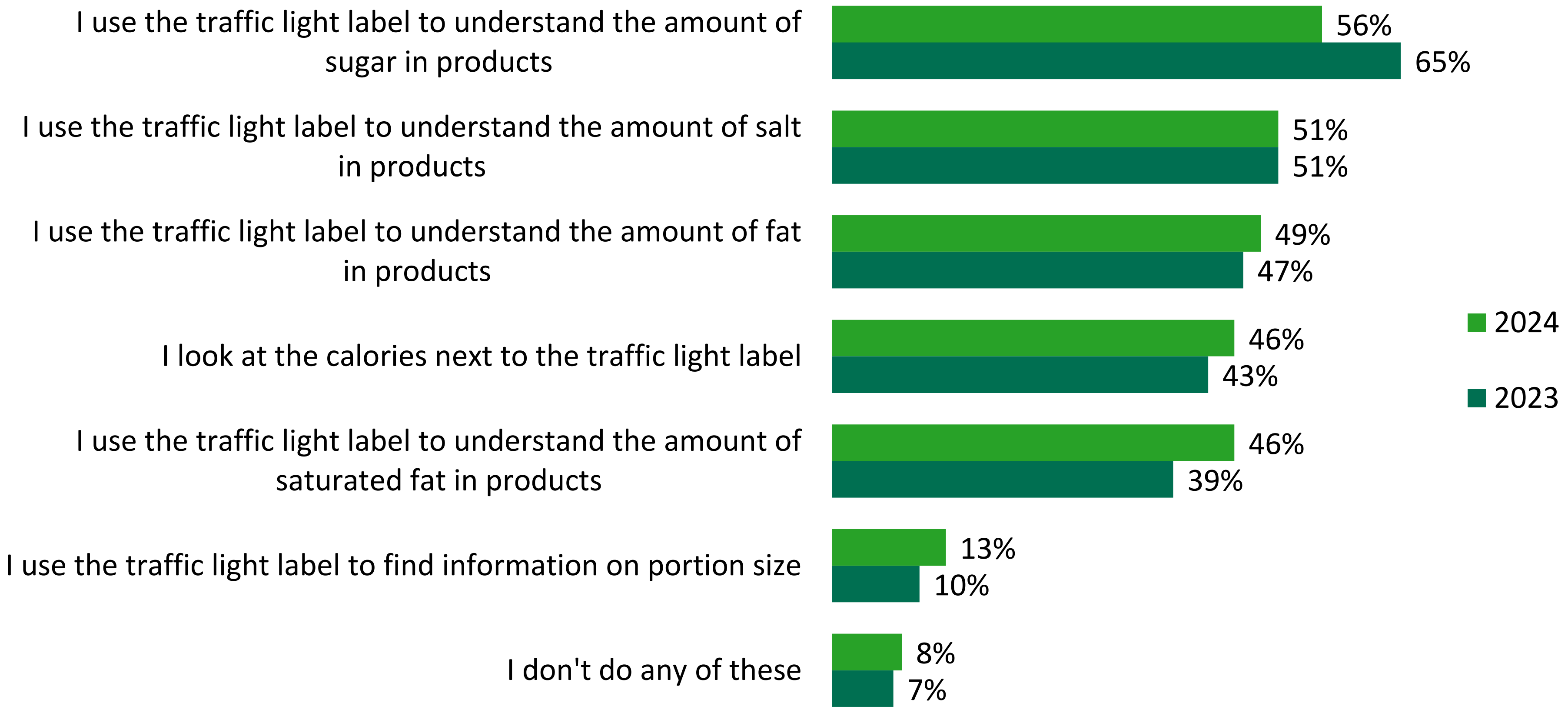
Base: 2024 (563), 2023 (557), 2022 (558) adults in Northern Ireland aged 18+ who recognised the traffic light label

Image: Traffic Light Label



Consumers are most likely to use the traffic light label to understand the sugar content of products – though they are less likely to do this than in last year

B5a. Which, if any, of these do you do when buying food?



Consumers shopping for themselves use the traffic light label to help them understand the amount of:

- Sugar;
- Salt;
- Fat;
- Saturated fats; and,
- Calories.

Base: 2024 (277), 2023 (237) adults in Northern Ireland who use the traffic light label when shopping

Consumer purchasing of chocolate confectionery, crisps and snacks is still influenced by promotions”

B7. To what extent would you agree or disagree with the following statements on promotions?

49%

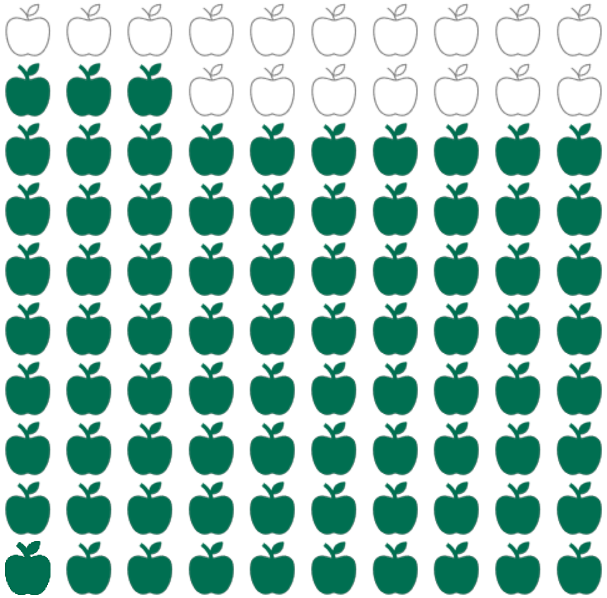
of consumers agree they are more likely to buy chocolate confectionery, crisps, snacks if they are on promotion (48% in 2023).

Base: 611 adults in Northern Ireland aged 18+

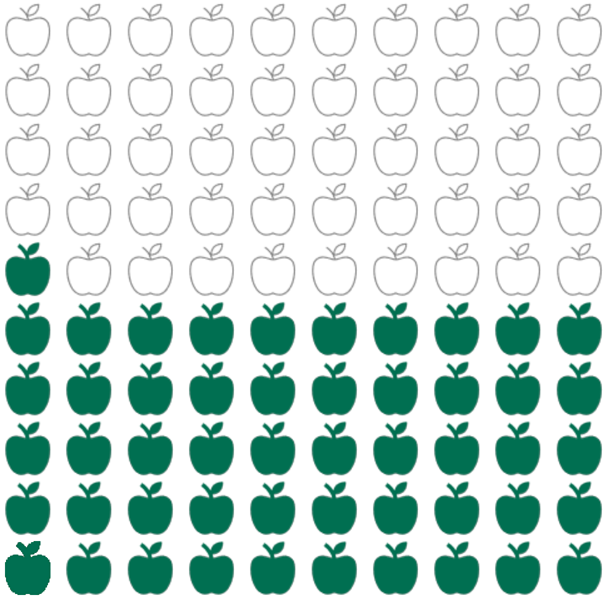
Over eight in ten consumers want to see promotions on fruit and vegetables, but only half would be more likely to actually purchase these foods if they were on promotion

B7. To what extent would you agree or disagree with the following statements on promotions?

83% Would like to see more promotions on fruit and vegetables **(80% in 2023).**



51% Would be more likely to purchase fruit and vegetables if they were on promotion **(43% in 2023).**



Base: 611 adults in Northern Ireland aged 18+

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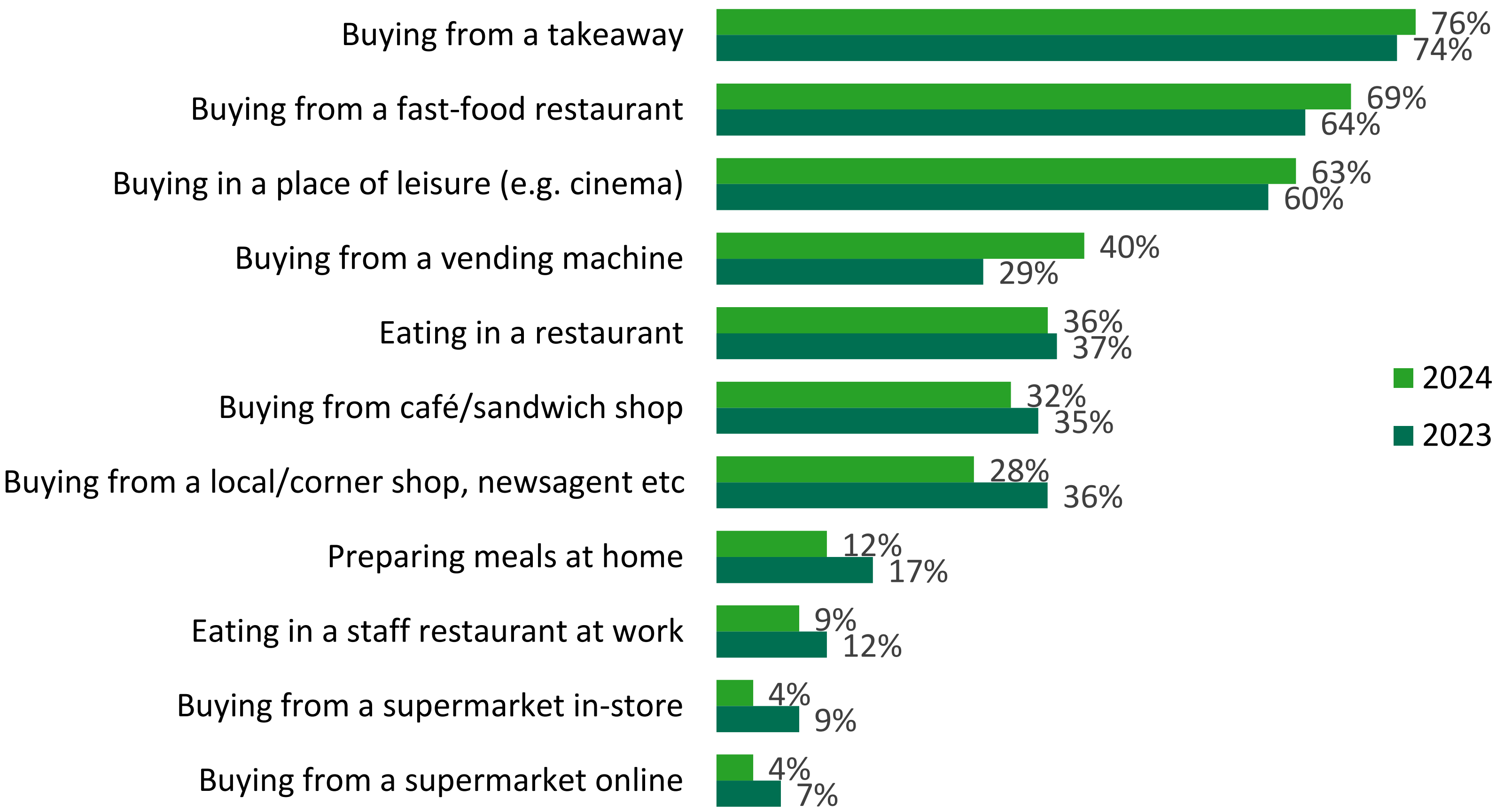
Consumers still find it more challenging to choose healthier food when eating out compared to shopping in supermarkets

H1a. Overall, for each of the following, how easy or difficult is it for you to choose healthier food and meals? (% of consumers who find it difficult)



In line with previous findings, choosing to eat healthier meals when eating out is a challenge for consumers. In 2024, consumers find it most difficult to make healthy choices when eating at:

- Takeaways (76%);
- Fast-food restaurants (69%); and,
- Places of leisure e.g. cinemas (63%).

Compared to previous findings, there has been an increase in the number of consumers who report finding it difficult to choose healthier food in vending machines (40% in 2024 vs 29% in 2023).

Base: 2024 (611) 2023 (601) adults in Northern Ireland aged 18+

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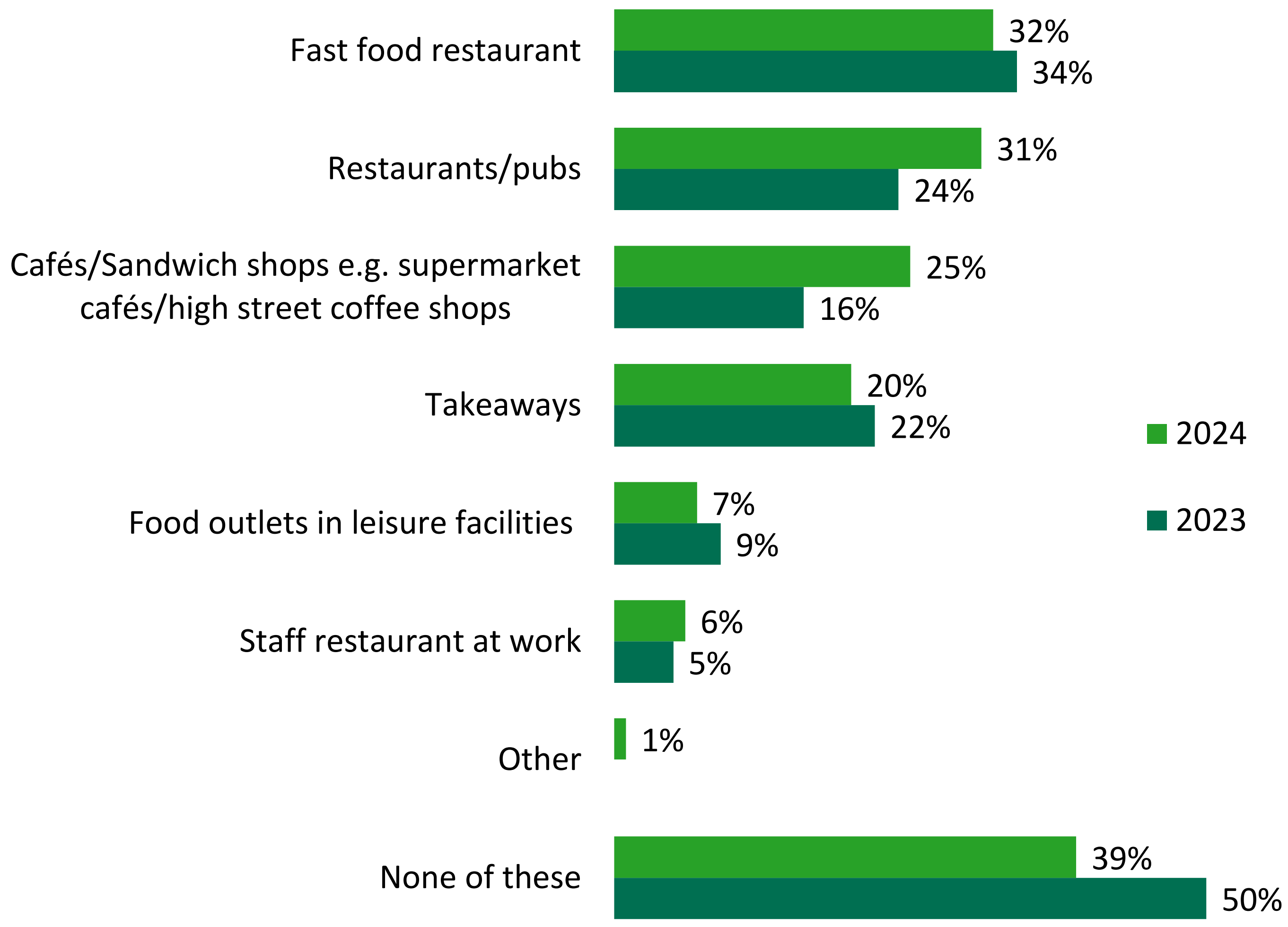
Awareness of calories on menus has increased over time

H4a. Have you ever noticed calories being shown on a food menu in any of these places?



Between 2023 and 2024, consumer awareness of calorie information on menus has generally increased across various settings. 61% are aware overall in 2024 versus 50% in 2023.

Fast food restaurants and traditional restaurants/pubs consistently show the highest levels of consumer awareness regarding calories on menus. The most significant rise in awareness is for cafes and sandwich shops, with a quarter (25%) in 2024 stating they have noticed calories on menus.

Around half of consumers in 2023 did not notice calorie information on menus in any food settings. This has decreased to 39% in 2024, an 11-percentage point drop compared to 2023.

Base: 2024 (611), 2023 (601) adults in Northern Ireland aged 18+

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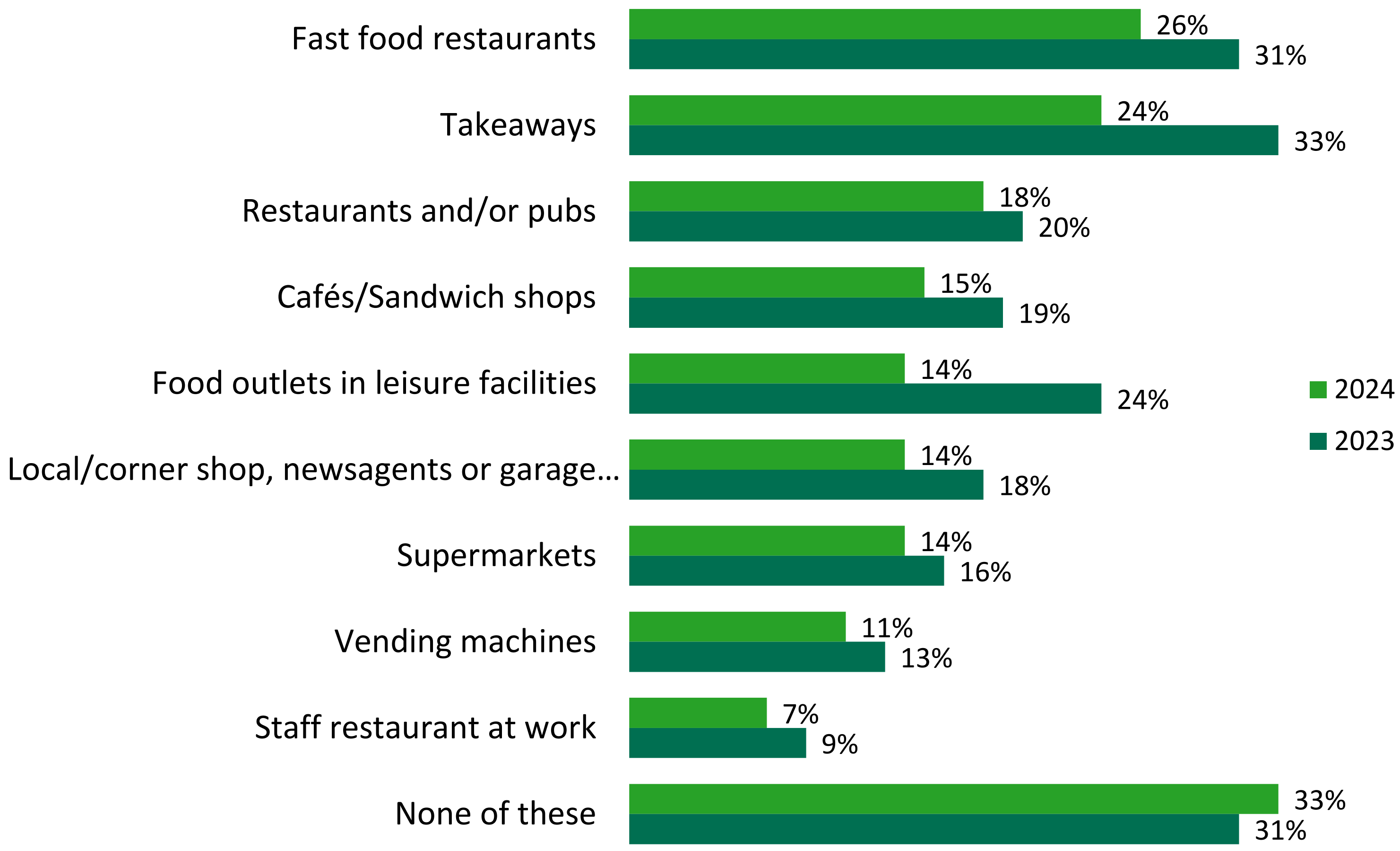
Consumers have become less likely to say they wish to see healthier products in various settings

H1b. Where, if in any setting, would you like to see healthier products?



Takeaways, fast food restaurants, and food outlets in leisure facilities saw the most significant drops, whereas supermarkets remained relatively stable. In 2024, around a quarter of consumers would like to see healthier products in takeaways (24%) and fast-food restaurants (26%).

As consumers often choose traditional, less healthy options at takeaways because they accept these foods as indulgent or convenient, presence of healthier alternatives may not change behaviour. This highlights a consumer segment where preferences are shaped more by context than health.

Base 2024 (611), 2023 (601) adults in Northern Ireland aged 18+

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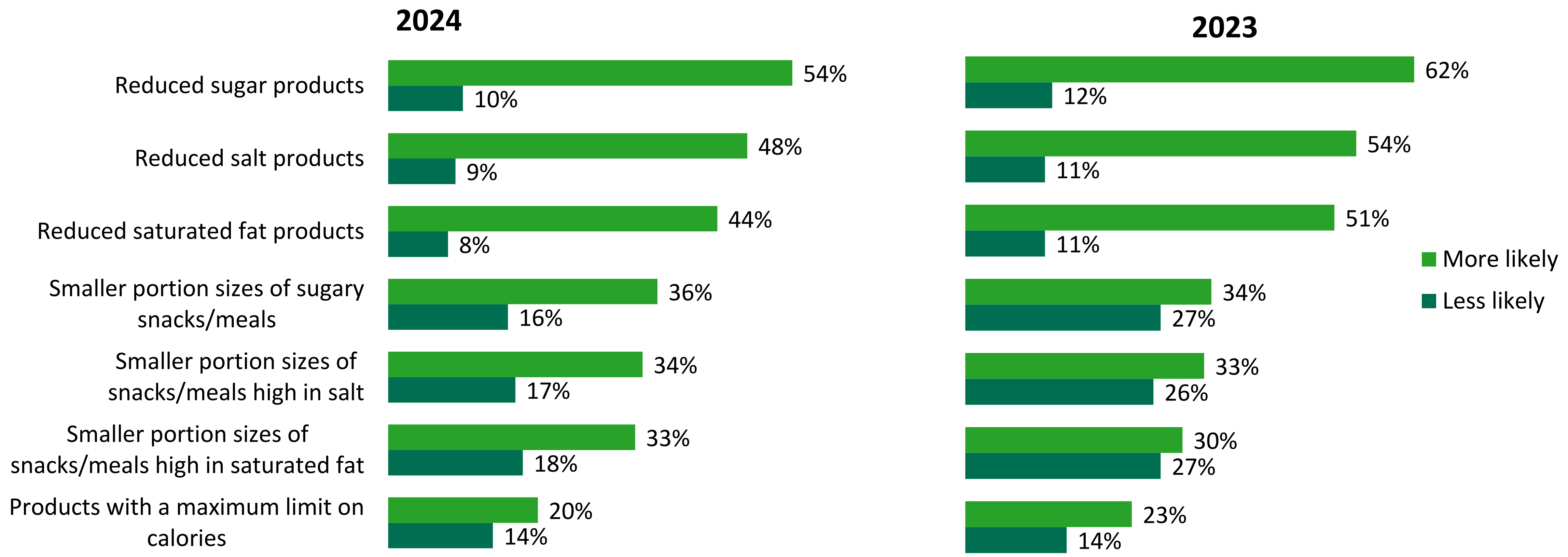
Consumers are more likely to purchase products with reduced sugar, salt and/or saturated fat than products with smaller portion sizes

H2. How likely or unlikely are you to buy these options compared to a regular version of products (e. g. for sauces, cereals, meals, snacks and puddings)?



Base: 611 (2024), 601 (2023) adults in Northern Ireland aged 18+

Sub-group analysis

Gender

- More women (76%) than men (58%) claimed to choose healthier food options while food shopping.
- Although women and men claimed to pay attention to the healthier options on the menu equally (26% and 24%, respectively), women (41%) were more likely than men (31%) to say they would like to see healthier options on menus.
- Women were more likely to check nutritional claims (30%) and check the nutritional information on the back of packaging (40%) than men (23% and 31% respectively). More men (40%) also claimed they do not use packaging to seek out nutritional information for food they purchase, compared to women (27%).
- Women (95%) were more likely than men (89%) to recognise the traffic light label on food products. They were also more likely to use the label when shopping for food (53% for women vs 44% for men). Women were more likely than men to purchase reformulated versions of products with reduced sugar (61% vs 46%), reduced saturated fats (51% vs 38%), and reduced salt (52% vs 44%).
- Men (43%) were more likely to report not wanting to see reformulated food options or smaller portion sizes compared to women (29%).

Age

- More consumers aged 35-54 (93%) reported shopping for food in a supermarket (including online) compared to consumers aged 18-34 and 55+(both 78%). Consumers aged 55 and over (53%) were more likely to shop in independent greengrocers and butchers than younger consumers (35% of those aged 18-34, and 42% of those aged 35-54).
- Those aged between 18-34 (96%) and 35-54 (97%) were more likely to recognise the traffic light label compared to those aged 55 and over (85%). However, adults aged 35-54 appeared to show a better understanding of the traffic light label (92%) compared to younger adults under 35 (84%) and older adults 55 and over (83%). Adults aged 35-54 (90%) and those 55 and over (89%) found it easier to make healthy food choices when preparing meals at home compared to younger consumers aged 18-34 (77%).
- Consumers aged 18-34 (85%) and 35-54 (83%) found it more difficult to choose healthier options from takeaways compared to older consumers aged 55 and over (64%). This was also true when choosing in fast food restaurants (82%, 79% vs. 51%) and food outlets in leisure facilities (74%, 72% vs. 47%). However, more adults aged 18-34 (62%) and 35-54 (58%) reported they would not try and choose a healthier option when eating out compared to adults aged 55+ (43%).

Socio-economic group

- Those from higher socio-economic groups (74%) were more likely to agree their eating habits were healthy compared to those from lower socio-economic groups (56%). More consumers from lower socio-economic groups (40%) claimed they do not use nutritional information on packaging to seek out nutritional information for food they purchase, compared to those from higher socio-economic groups (25%).
- Consumers from lower socioeconomic groups (41%) were less likely to use traffic light labels while food shopping than those from higher socioeconomic groups (58%). Consumers from higher socioeconomic groups also reported better understanding of these labels compared to those from lower socio-economic groups (93% vs. 81%). Those from higher socio-economic groups were more likely to check calories (53% vs. 38%), fats (55% vs. 42%), and saturated fats (52% vs. 39%) when shopping for themselves compared to consumers from lower socio-economic groups.
- Those from higher socio-economic groups (87%) were more likely to express interest in seeing more promotions on fruits and vegetables compared to those from lower socio-economic groups (80%). However, the lower socio-economic group (54%) would be more likely to purchase these products on promotion than the higher socio-economic group (46%).

Conclusions

Conclusions

- Knowledge around daily calorie requirements is low across consumers, particularly men. Additional consumer education and awareness campaigns may be useful to increase this knowledge, particularly in settings where the majority of consumers do their shopping, such as in-store at supermarkets. Other locations which showed an increase in shopping activity, such as local/corner shops, could also be examined.
- While general awareness of the traffic light labelling system is high, only half of consumers report using it when making food purchases. Men from lower socio-economic groups are least likely to use this system and are also more likely to disregard nutritional information on product packaging. Efforts could be made to educate consumers on how to use traffic light labels to identify and select healthier options, particularly to those consumers who are least likely to use and understand the traffic light labelling system.
- Consumers across different socio-economic groups show interest in fruit and vegetable promotions, however their behaviours appear to differ. While a larger proportion of the higher socioeconomic group express interest in seeing more promotions, the lower socioeconomic group are more likely to purchase these products if promotions are offered. This difference suggests price sensitivity is a stronger motivator for those from lower socio-economic groups. Therefore, effective promotional strategies could consider these distinct motivations and barriers faced by different groups of consumers.
- Despite a growing consumer interest in healthier eating, accessing more nutritious options when eating out remains a challenge. Restaurants and other settings could prioritise healthier options and communicate effectively these offerings. This could be achieved by offering more nutritious options on menus and clearly labelling menus with nutritional information.

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This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the client contract.

THANK YOU

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