Food reformulation: the views of the public on the island of Ireland

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Executive summary

Introduction

This research was commissioned by Safefood in partnership with the Food Reformulation Task Force in Ireland and the Food Standards Agency in Northern Ireland to replicate 2018 research undertaken by the Food Standards Agency in Northern Ireland.

The research set out to gather up-to-date information on public perceptions/acceptability of food reformulation (reduction in sugar, salt, fat and/or calories in pre-packaged and processed food and a decrease in portion size of pre-packaged food) among six identified categories of food from the Food Pyramid/Eatwell Guide. The food categories included in this research are:

- Ice-cream
- Baked pastries or buns
- Biscuits
- Cakes and Desserts
- Yoghurts
- Breakfast Cereal.

In this research, the sample was expanded to include members of the public in Ireland, in addition to members of the public in Northern Ireland as per the original survey in 2018. Throughout this report, findings are reported by the island of Ireland, Ireland and Northern Ireland.

Aims and objectives

The core objective of the research was to investigate peoples' perceptions/acceptability of food reformulation (reduction in sugar, salt, fat and/or calories in pre-packaged and processed food and a decrease in portion size of pre-packaged food). Other objectives of the research included:

- To determine what members of the public feel are the advantages of making food and drinks healthier and any concerns that they may have about this.

- To understand whether members of the public would like to be informed about any changes made to food and drinks to make them healthier.
- To identify who members of the public feel is responsible for driving efforts to make food and drinks healthier.
- To determine who members of the public feel should communicate information about any changes made to food and drinks and the way this information should be communicated.

Methods

A mixed methodology research approach was employed using qualitative discussion groups and application (app) based diaries along with online quantitative research.

Findings

Public perceptions and acceptability of food reformulation:

- Food reformulation is viewed positively, almost six in ten people (59%) feel positive about a reduction of sugar, salt, fat, and/or calories in pre-packaged or processed food,
- A smaller proportion, 45% of people view a reduction in portion sizes positively.
- While most people feel positively about food reformulation, two thirds agree that they are concerned that food manufacturers could use efforts to make products healthier as a way to make more money.

Perceived advantages and concerns of people about making food and drinks healthier:

- People believe the primary benefit of reformulated foods is enhanced health value, irrespective of product type. This belief is highest for breakfast cereal (60%) and yogurt (56%).
- The next most common perceived benefits are reduced guilt (18-35% varying by product and ability to purchase the product more frequently (roughly 20%, up to 25% for yoghurt and cakes/desserts).
- One in five people do not perceive any benefit to reformulation.

- The top two concerns about reformulated products are potential impacts on taste and price. Over half of people are concerned about the taste being affected.
- Over half are also concerned reformulated products will be more expensive (50-54% across products).
- Approximately 4 in 10 people are concerned reformulated products will be worse value for money.
- 66% are concerned manufacturers will use reformulation efforts to make more money, relating to concerns about “shrinkflation” that emerged in qualitative research.

Do people want to be informed about changes to make foods healthier?

- Most people expressed a preference to be informed if the product that they buy occasionally or often is changed, the main reasons for this are to be informed about what they are eating (46%) and to be able to make an informed purchasing decision (16%).
- However, the qualitative research showed that communication preferences depend on the scale of changes, if it’s a new variant or changes to an existing product, and how long changes occur over.

Who do people feel is responsible for driving efforts to make food and drinks healthier?

- The public believe health professionals (64%), the Food Safety Authority of Ireland/Food Standards Agency in Northern Ireland (59%) and the government (57%) are the top drivers of efforts to reduce unhealthy ingredients.
- For reducing portion sizes, food manufacturers are also seen as a top driver (36%) along with health professionals, the Food Safety Authority of Ireland/Food Standards Agency in Northern Ireland and government.

Who should communicate changes and how?

- It is clear from the research that the people would like information about product changes to be communicated by food manufacturers (76%) on their labelling by describing exactly what has changed (75%) and/or that there is a new recipe (63%).

- The most preferred communication methods are, label on packing describing exactly what changed (75%), label saying there is a new recipe (63%), information in-store (33%) and advertising (30%).

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Introduction

This research was commissioned by Safefood in partnership with the Food Reformulation Task Force in Ireland[1] and the Food Standards Agency in Northern Ireland to replicate 2018 research undertaken by the Food Standards Agency in Northern Ireland (Food Standards Agency, 2018 Northern Ireland consumer perceptions of reformulation of food).

The research set out to gather up-to-date information on public perceptions/acceptability of food reformulation (reduction in sugar, salt, fat and/or calories in pre-packaged and processed food and a decrease in portion size of pre-packaged food) among six identified categories of food from the Food Pyramid/Eatwell Guide to support the reformulation programmes in both Ireland and Northern Ireland.

The food categories included in the research are:

- Ice-cream
- Baked pastries or buns
- Biscuits
- Cakes and Desserts
- Yoghurts
- Breakfast Cereal.

This research also includes an expanded sample to include members of the public in Ireland, in addition to members of the public in Northern Ireland as per the original research in 2018. Throughout this report, findings are reported by the island of Ireland, Ireland and Northern Ireland.

The outcomes from this research can be used by all those involved in reformulation programmes on the island of Ireland, including those working in policy, practice and communications with members of the public and with representatives from the food industry. It is imperative that the perspectives and views of members of the public be

[1] The Food Reformulation Task Force is a collaborative effort between the Food Safety Authority of Ireland and Healthy Ireland. Formed to put the Roadmap for Food Product Reformulation in Ireland into action, this task force aims to make food in Ireland healthier between 2021 and 2025.

available so that they can inform efforts to reduce calories, saturated fat, sugar and salt in food. The findings from this research provide a strong evidence base to inform future engagement with industry and support on-going conversations and potential partnerships.

Aims and objectives

The primary aim of this research was to investigate public perceptions and acceptability of food reformulation (reduction in sugar, salt, fat and/or calories in pre-packaged and processed food and a decrease in portion size of pre-packaged food).

Additional objectives of the research were:

- To determine what members of the public feel are the advantages of making food and drinks healthier and any concerns that they may have about this.
- To understand whether members of the public would like to be informed about any changes made to food and drinks to make them healthier.
- To identify who members of the public feel is responsible for driving efforts to make food and drinks healthier.
- To determine who members of the public feel should communicate information about any changes made to food and drinks and the way this information should be communicated.

Methods

A mixed methodology research approach was employed using qualitative discussion groups and application-based diaries along with online quantitative research.

Phase 1 – Qualitative research

The qualitative element of this research encompassed both discussion groups and diaries. Five discussion groups were conducted with members of the public across four life stages: pre-family, families with younger children, families with older children and empty nesters. Fieldwork took place between 2 and 8 November 2023. The demographic composition of each discussion group is outlined in Table *1*.

The two groups recruited for this study were defined based on their understanding of and attitude towards nutrition and food labelling. This resulted in two cohorts: 'Unsupported and confused' vs 'Engaged and knowledgeable'. During the recruitment process, members of the public were asked the extent to which they agree with seven statements:

- I find the packaging and labelling around fat, sugar and salt quite confusing and don't entirely understand them
- I would appreciate supermarkets and manufacturers (brands etc.) supporting me in understanding labelling in food packaging
- I can feel a little overwhelmed by the information on nutrition labels on food packaging
- I tend not to follow any news stories about fat, sugar and salt, as I find them a little dull and confusing
- I understand most of if not all the nutritional labelling on food packaging and choose what to buy based on this information
- I always follow news stories relating to food and food production and find them informative and interesting
- I keep myself up-to-date on all issues relating to food and food production /manufacture

Based on their response to these and other questions, they were categorised as either engaged and knowledge or unsupported and confused.

Mixed gender (male and female) groups and all female groups were recruited with differing socioeconomic grades (SEG). An outline of each SEG is provided below:

- **A** = Professionals/Senior Management
- **B** = Middle Management in large organisations with appropriate qualifications
- **C1** = Junior Management/owners of small establishments and all others in non-manual positions
- **C2** = All skilled manual workers and those manual workers with responsibility for other people
- **D** = All semi-skilled and unskilled manual workers and apprentices and trainees to skilled workers
- **E** = All those entirely dependent on the state, long-term, through sickness, unemployment, old age or other reasons. Those unemployed for a period exceeding six months (otherwise classified based on previous occupation).
- **F** = Farmers/farm managers/farm workers

Table 1: Demographic composition of qualitative discussion groups

#	Segment	Gender	SEG	Lifestage	Location
1	Unsupported and confused	Female	C1C2	Family (at least one child under 11)	Urban Ireland
2	Engaged and knowledgeable	Female	C2DE	Family (at least one child under 11)	Urban Ireland
3	Engaged and knowledgeable	Mixed	BC1	Family (at least one child under 11)	Rural Ireland
4	Engaged and knowledgeable	Mixed	BC1	Family (at least one child under 11)	Urban Northern Ireland
5	Unsupported and confused	Female	C1C2	Pre-family	Rural Northern Ireland

Ipsos applife diary

Sixteen participants (9 Ireland, 7 Northern Ireland) took part in a study, 'Project Food', on the Ipsos Applife platform. The study aimed to discover public attitudes towards food and their shopping habits.

Respondents were prompted with scheduled tasks to complete throughout the course of fieldwork, with answers taking the form of either short video responses, audio responses or open-ended text answers. Tasks included:

- Getting to Know You
- Show us Your Food!
- The Items in Your Cupboard
- A Typical Food Shop
- Your Food Purchases
- Food in the News
- Food Reformulation.

The findings from the qualitative research are outlined below and informed the design of the questionnaire for the quantitative phase of the research:

- Overall, respondents would be happy to change the salt, sugar or fat content of the product if the taste doesn't change drastically and the portion size stays the same – '*I would prefer this option because these are already pre portioned and any less would likely not keep my little boy satisfied. It's unlikely it would impact my buying as I already buy them regularly, but I would feel better about what my little boy is consuming*'.
- Respondents wanted clear communication about significant recipe changes, such as labels on packaging or stickers pointing out the changes. Some also suggested TV advertising campaigns – *'I would want to know why the portion was smaller if not clear I would assume it was a cost saving exercise but if for health reasons I would accept this completely'.*
- Price, promotions/offers, familiarity with product, and portion sizes were generally the most important factors influencing food purchases rather than health attributes like sugar and fat content.

- There was concern from some respondents about unintended consequences of food reformulation, like taste changes or people consuming more of a smaller portion product – *'I'd be concerned that reducing the size/portion of products would just make people buy more of it and consume more of that product'.*
- Some respondents highlighted the need for more public education, especially for children, on healthy eating rather than over relying on reformulation to drive health improvements – *'The money should be going towards education to young people to educate them on what is healthy and what is not'.*

Phase 2 – Quantitative research

The quantitative element of this study was conducted among a representative sample of 809 people aged 16+ in both Ireland (n=509) and Northern Ireland (n=300) using online panels. Fieldwork was conducted in February 2024.

To qualify to participate, people had to purchase at least one of the following products either occasionally or often:

- Ice-cream
- Baked pastries or buns
- Biscuits
- Cakes and Desserts
- Yoghurts
- Breakfast Cereal.

When it came to asking people questions specifically about their attitudes towards food reformulation and a reduction in portion sizes, the sample was divided into three separate groups. Each sample was exposed to a different introduction to the section of questions about food reformulation: one group saw no introduction, the second group was informed that the proposed changes were initiated by the Government, and the third group was informed that food manufacturers were responsible for the proposed changes. This division of the sample aimed to investigate if peoples' responses to the concept of food reformulation and reduction in portion sizes varied based on the 'driver' of the changes.

Results

Putting the research findings in context

The research findings should be considered based on an understanding of peoples' responses in both the broader economic context and in the context of peoples' personal eating habits and food choice behaviours. Conducted in 29 countries among a panel of over 20,000 adults for more than a decade, the Ipsos 'What Worries the World' survey[2] provides a snapshot of world opinion on pressing global issues. The most recent wave of the study including data for Ireland was undertaken in October 2023 and showed that inflation was the top concern globally at 39%. Inflation was also found to be the top concern in Ireland and higher than the global average at 44%. The research also showed that consumers globally have noticed changes to the products that they purchase, with 59% noticing the cost of products rising while the product size remains the same (inflation), 46% have noticed product sizes becoming smaller but the price remaining the same (shrinkflation) and a further 22% noticed changes in the ingredients used in foods and other products, with the price remaining the same. The implications of these findings are that there is an assumption among consumers that changes in food products are directly linked to the cost of living and inflation.

From an island of Ireland perspective, the rise in the cost of living is having a significant impact on quality of life. Rising costs are not just seen in food but also across housing, fuel, utilities, transport, entertainment and education. This is a narrative that has dominated for the last two years and is likely to do so into 2025 even if it looks like inflation is slowing down. The food reformulation research findings should be understood in this context.

[2] https://www.ipsos.com/en/what-worries-world

Sample profile

The weighted demographic profile of people who participated in the online quantitative survey is outlined in Table *2*.

Table 2: Sample profile

Characteristic	Group	Percent
Gender	Male	49%
	Female	51%
Age	16-24 years	14%
	25-34 years	16%
	35-44 years	18%
	45-54 years	18%
	55-64 years	14%
	65 plus years	20%
Region	Northern Ireland	27%
	Ireland	73%
Socio-economic group	ABC1	44%
	C2DEF	56%
Parent	Yes	29%
	No	71%
Grandparent	Yes	8%
	No	92%

Please note that the base for these figures is all respondents, 809 people. The socio-economic grouping definitions are provided in the methods section.

Purchasing patterns

The proportion of respondents that purchased each one of the qualifying products either occasionally or often is outlined in Table *3*. It is clear that these products are purchased by at least 6 out of ten people occasionally or often. Table *4* details that, in most cases the products concerned were being purchased by adults for their own consumption.

Table 3: Proportion of respondents purchasing each of the qualifying food products occasionally or often

Product purchased	Percent of respondents	No of respondents
Biscuits	84%	668
Breakfast cereals	82%	661
Yoghurt	82%	655
Baked pastries	77%	622
Cakes and Desserts	60%	487
Ice cream	59%	469
Biscuits	84%	668

Question: How frequently do you buy each of the following food items? The base for these figures is all respondents, 809 people.

Table 4: Persons for whom each product was bought

Food item	Number of consumers	Bought for myself (%)	Bought for other adults (%)	Bought for others (%)
Ice-cream	469	75	53	7
Baked pastries	622	82	61	6
Yoghurt	655	82	50	4
Breakfast cereals	487	80	64	4
Cakes and desserts	661	78	50	4
Biscuits	688	77	62	8

Participants were asked: Who do you buy each of the following items for? 'Others' in this context refers to any other individual other than those listed (Myself, Other Adults, My children, My grandchildren). Base: The base for these figures is all respondents who purchased each product.

When it comes to parents and grandparents, the findings in Table *5* show that more than 90% of parents buy breakfast cereal (93%) and/or ice-cream (91%) for their children either occasionally or often while 71% of grandparents buy ice-cream occasionally or often for their grandchildren.

Table 5: For whom do you buy the products?

Food item bought	Bought for my children (%)	Sample size (children)	Bought for my grandchildren (%)	Sample size (grandchildren)
Ice-cream	91%	154	71%	50
Baked pastries	79%	189	37%	57
Yoghurt	83%	200	50%	64
Breakfast cereals	78%	153	42%	54
Cakes and desserts	93%	202	34%	69
Biscuits	81%	203	45%	73

Question: Who do you buy each of the following items for? Base: The base for these figures is all parents who purchase each product and all grandparents who purchase each product.

Personal eating habits

As a first step, the quantitative research sought to gain an insight into how peoples' view their personal eating habits by asking them to rate these habits on a scale of 1 to 10 where 1 is very unhealthy and 10 is very healthy (Table *6*). Just under one in ten people (8%) rate their eating habits as very healthy (a rating of 9 or 10), while 45% rate them as very unhealthy (a rating of 1 to 6). A further 48% gave a rating of 7 or 8. Those who are parents and/or grandparents of children aged under 16 were also asked to rate the eating habits of their children and/or grandchildren. Just over four in ten parents (42%) rate their children's eating habits as very unhealthy (1 to 6), 12% rate them as very healthy (9 to 10) and 46% gave a 7 or 8 score.

One third of grandparents rate their grandchildren's eating habits as very unhealthy (1 to 6), 23% rated them as very healthy (9 to 10) and 44% gave a 7 or 8 score.

Despite a higher inclination among grandparents to rate their grandchildren’s dietary habits as very healthy compared to parents, this variation is not statistically significant.

Table 6: Respondents rating of their eating habits and the eating habits of their children and grandchildren

Eating habits	**Very unhealthy eating habits**	**Neither healthy nor unhealthy eating habits**	**Very healthy eating habits**
Personal eating habits	45%	48%	8%
Children's eating habits	42%	46%	12%
Grandchildren's eating habits	33%	44%	23%

Participants were asked: On a scale of 1-10, where 1 is very unhealthy and 10 is very healthy, how healthy do you think your personal/children’s/grandchildren’s eating habits are? Base: All respondents (809), All parents (220), All grandparents (80)

These findings are both an opportunity and a challenge for food reformulation policy. The significant percentage of individuals considering their dietary habits as unhealthy signifies an urgent need for healthier food options. Consequently, food reformulation aimed at reducing unhealthy ingredients could be welcomed by these people, particularly if such products are presented to improve overall diet quality. However, a significant proportion of people consider their eating habits to be moderately healthy. This could mean they might be less inclined to see the need for change or be resistant to alterations in food products.

Food choices, shopping habits and decision making

Food choice and shopping habits

People were asked to rate their agreement, on a scale of 1 to 10 where 1 is strongly disagree and 10 is strongly agree, with a few statements about their food choices and shopping habits. This scale was chosen to create clear separation between positive, negative and neutral responses. Scores of 1-6 represent negative sentiment, 7-8 represent neutral sentiment, and 9-10 represent positive sentiment. The responses are presented in Table 7.

Table 7: Agreement with health-related statements

Statement	Strongly disagree	Neither agree nor disagree	Strongly agree	Don't know
I tend to buy convenient options when shopping (e.g. pre-made ready meals, pre-packaged meals)	77%	17%	5%	<1%
When eating out, I try to choose a healthier option from the menu e.g. lower calorie option, dish with a higher vegetable content etc.	74%	18%	7%	1%
Healthier foods are easy to spot in supermarkets	58%	28%	13%	1%
I find it easy to choose healthier options for my grandchildren when shopping	46%	37%	17%	0%
I find it easy to choose healthier options for my children when shopping	45%	42%	13%	<1%
When shopping for food, I try to choose healthier versions of products e.g. low in fat, high in fibre	42%	40%	17%	<1%
I understand which types of food are healthier or which are less healthy.	19%	43%	37%	<1%

Participants were asked: On a scale of 1-10, where 1 is strongly disagree and 10 is strongly agree, how much do you agree or disagree with the following statements? There are no right or wrong answers. Base: All respondents (809)

Regarding food purchases, most people (77%) strongly disagree with the idea that they opt for convenient options, such as pre-made meals or pre-packaged snacks, while only a relatively small proportion (5%) strongly agree. Almost six in ten (58%) strongly disagree that healthier foods are easy to spot in supermarkets, whilst 13% strongly agree that they are easy to spot. When it comes to making healthier food choices, just under one in five people (17%) strongly agree that they make these choices when shopping and just over four in ten (42%) strongly disagree.

The trend of finding it challenging to make healthier choices extends to parents as well, with 45% strongly disagreeing that it is easy to select healthier options for their children and 13% strongly agreeing. This result was similar among grandparents, with 46% strongly disagreeing and 17% strongly agreeing.

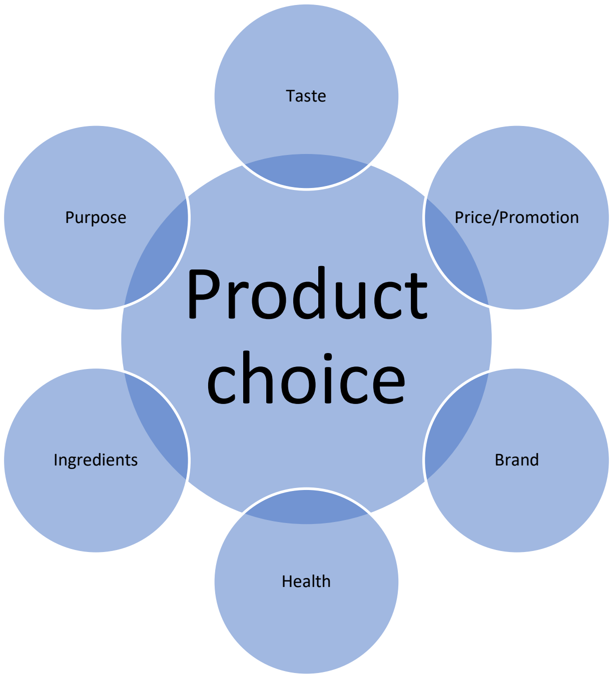
When dining out, a significant majority of people (74%) strongly disagree that they choose healthier options from the menu, whereas only 7% strongly agree that they try to make healthier choices. The highest level of agreement with any statement was with the statement that people understand the difference between healthier and less healthy food types, with 37% strongly agreeing. Just under one in five (19%) strongly disagree with this statement.

The findings further demonstrate the considerable challenges that are faced in terms of promoting healthier eating habits among people, with difficulties identified in terms of spotting healthier food options in supermarkets and making healthier food choices while shopping and dining out. Despite the challenges, 37% of people strongly agree that they understand the difference between healthier and less healthy food types.

Decision making

The findings from the qualitative research highlighted that while people generally know which foods are healthy, they don't always choose them. Before the discussion groups took place, people were asked to think about the criteria they used to make choices across a range of foods from a sample of suggested categories including yoghurt, biscuits, breakfast cereals, and cheese. The research uncovered that when looking at a specific product there are several variables which help people to determine their choice. These variables are illustrated in Figure *1*.

Figure 1: Factors influencing product choice



Purpose: is the product a staple of a main meal or a more hedonistic/pleasure-seeking snack?
Taste: The variance in taste depends on the category with some products in categories e.g. cereals perceived to be inedible due to the taste.
Price/Promotion: As noted earlier the price/promotion associated with a product has a big impact on choice given the cost of living.
Health: Closely linked to the purpose. The importance of health will vary according to the purpose and the profile of the consumer e.g. children vs. adults.
Ingredients: The focus on specific ingredients themselves will vary depending on the purpose, the profile of the consumer and norms associated with categories e.g. to what extent sugar is associated with specific categories.

The balance of these variables differs depending on the consumer, the category and the brands involved.

The quantitative research explored decision making further and sought to provide a measure of the importance of health to people when buying the six food products covered in the research. The results presented in Table *8* show clearly that while health is very important when purchasing yoghurt (35%) and breakfast cereal (33%), the number of people who consider health to be very important when purchasing biscuits, cakes and desserts, baked pastries and buns and ice-cream is only 7%, 7%, considerably less likely to be the case when purchasing biscuits (7%), cakes and desserts (7%), baked pastries and buns (6%) and ice-cream (6%).

Table 8: Importance of health when buying product

Food item	**Not at all important**	**Not very important**	**Quite important**	**Very important**	**Don't know**
Ice-cream	20%	45%	27%	6%	2%
Baked pastries and buns	17%	46%	29%	6%	2%
Cakes and desserts	16%	46%	29%	7%	2%
Biscuits	15%	49%	28%	7%	1%
Yoghurt	2%	13%	49%	35%	1%
Breakfast cereals	2%	13%	50%	33%	1%

Respondent were asked: How important is health to you when buying each of the following foods/drink? Base: All respondents on the island of Ireland (809).

Awareness and understanding of the concept of food reformulation

The quantitative research sought to provide a robust measure of awareness and understanding of food reformulation.

Reducing the sugar, salt, fat and/or calorie content in pre-packed or processed food

Just under one third (32%) of adults on the island of Ireland were found to have heard something about reducing sugar, salt, fat and calorie content in pre-packed or processed food, with those in Northern Ireland more likely to have heard something (44%) than those in Ireland (27%) (Table *9*).

Table 9: Heard anything about reducing sugar, salt, fat and/or calories?

Location	Yes	No	Don't know
Island of Ireland	32%	58%	10%
Ireland	27%	64%	9%
Northern Ireland	44%	42%	14%

Participants were asked: Have you heard anything related to reducing the sugar, salt, fat and or/calorie content in pre- packed or processed food? This could be news stories, information you've seen or something you have watched on TV (e.g. documentaries). Base: all respondents: 809, all respondents in Ireland 509; all respondents in Northern Ireland: 300.

Among those who had heard something about this, the top mention in terms of what had been heard was ‘it's better for you' at 16%, followed closely by ‘it was mentioned in the media' at 13% and ‘they are bad for you/cause ill health' at 10% (Table *10*). As outlined in Figure *2*, while a wide variety of responses were provided, at an overall level a sense of what was involved in food reformulation is evident.

Table 10: Things heard about reducing sugar, salt, fat and/or calories

Thing heard	Respondents in island of Ireland	Respondents in Ireland	Respondents in Northern Ireland
It's better for you	16%	13%	20%
Mentioned in the media	13%	14%	11%

Bad for you/cause ill health	10%	10%	10%
Sugar tax	9%	11%	6%
Processed food is higher…	8%	9%	7%
Just that they are reducing these in food	7%	6%	10%
Reduced sugar in foods	6%	6%	6%
Clearer labelling about fat/sugar/salt	5%	5%	3%
Better to cook from scratch	4%	4%	5%
Might not make food better for you	4%	4%	4%

Participants were asked: What have you heard related to sugar, salt, fat and/or calories in pre-packed or processed food? Base: All respondents who have heard about reducing sugar, salt, fat and/or calories: on the island of Ireland 255; in Ireland 144; and in Northern Ireland 133. (Responses of 3% or less not shown).

Figure 2: Things heard about reducing sugar, salt, fat and/or calories

‘Reducing intake of saturated fats sugar and salt can lead to a healthy lifestyle’. Ireland

‘To cut down on childhood obesity as well as adulthood obesity. Also to try and educate and change eating habits’. Northern Ireland

‘Medical people are suggesting that we need to reduce the amount of sugar and salt we consume and that we should read the ingredients in the food we purchase’. Ireland

‘That foods with reduced salt and sugar are ultimately more healthy’. Northern Ireland

‘I’ve seen a few stories recently about “ultra processed” food and need to lower the salt and fat content’. Northern Ireland

‘Government intervention to reduce sugar in certain items to combat obesity’. Northern Ireland

Who is driving efforts to reduce the sugar, salt, fat and/or calorie content in pre-packed or processed food?

The research identified that people believe that health professionals (64%), the Food Safety Authority Ireland/Food Standards Agency (59%) and the Government (57%) are the drivers of efforts to reduce the sugar, salt, fat and/or calorie content in pre-packed or processed food, with no significant differences recorded between these top three mentions Table *11*.

Table 11: Who do people believe is driving efforts to reduce sugar, salt, fat and/or calories in pre-packed or processed food?

Perceived driver	Respondents in island of Ireland	Respondents in Ireland	Respondents in Northern Ireland
Health professionals	64%	65%	61%
FSAI/FSA	59%	62%	54%
Government	57%	56%	59%
The public	25%	31%	16%
Food manufacturers	22%	23%	20%
Retailers	11%	11%	11%

Participants were asked: Who do you think is driving these changes in terms of efforts to reduce the sugar, salt, fat and/or calories in prepacked or processed food? Base: All respondents who have heard about reducing portion size: 277 (island of Ireland); 144 (Ireland) and 133 (Northern Ireland).

Reducing the portion size of pre-packed or processed food

A smaller proportion of people recall hearing about reducing the portion size of pre-packed or processed food at 18% compared to those who have heard about food reformulation at 32% (Table *12*).

Table 12: Heard anything about reducing portion size?

Location	Yes	No	Don't know
Respondents in island of Ireland	18%	72%	10%
Respondents in Ireland	18%	73%	9%
Respondents in Northern Ireland	17%	70%	13%

Participants were asked: Have you heard anything related to reducing the portion size of prepacked or processed food? Base: all respondents who heard anything about reducing portion size: 809 (island of Ireland), 509 (Ireland), 300 (Northern Ireland).

Among those who had heard about reducing the portion size of pre-packed or processed food, shrinkflation (19%), pack sizes being smaller (17%) and better for you/healthier (16%) were the top mentions provided in terms of things people had heard (Table *13* and Figure *3*).

Table 13:Things heard about reducing portion size

Thing heard about	Respondents in island of Ireland	Respondents in Ireland	Respondents in Northern Ireland
Shrinkflation	19%	21%	13%
Portion/ packs will be smaller	17%	12%	30%
Better for you/healthier	16%	17%	10%
Mentioned in the media	11%	12%	10%
Portions nowadays are too big	11%	8%	19%
Eat less/small amounts	7%	7%	8%
Helps with weight loss/preventing obesity	5%	2%	13%
Smaller plates	4%	6%	0%
Reduces waste	4%	5%	0%
Processed food is bad for you	3%	4%	1%
Other	8%	10%	1%

Respondents were asked: What have you heard related to reducing the portion size of pre-packed or processed food? Base: All respondents who have heard about reducing portion size: 161 (island of Ireland), 101 (Ireland), 60 (Northern Ireland)

Figure 3: Things heard about reducing portion size

Respondents were asked: What have you heard related to reducing portion size of pre-packed or processed food? Base: all respondents who have heard about reducing portion size: 161.

Who is driving the changes in terms of efforts to reduce the portion sizes of pre-packed or processed food?

The top mentions in terms of who is driving the efforts to reduce portion sizes are health professionals (55%), the FSAI/FSA (48%) and the Government (48%). However, food manufacturers are more likely to be associated with this approach at 36% than they are with food reformulation (Table *14*).

Table 14: Who is driving efforts to reduce the portion sizes of pre-packed or processed food?

Driver	Percentage of respondents on the island of Ireland	Percentage of respondents in Ireland	Percentage of respondents in Northern Ireland
Health professionals	55%	55%	55%
FSAI/FSA	48%	50%	41%
Government	48%	48%	45%
The public	12%	12%	11%
Food manufacturers	36%	33%	44%
Retailers	13%	11%	19%
Don't know	4%	3%	6%

Respondents were asked: Who do you think is driving the changes in terms of efforts to reduce the portion sizes of prepacked or processed food? Base: All respondents who have heard about reducing portion size: 161 (Island of Ireland); 101 (Ireland), 60 (Northern Ireland).

Awareness of efforts to make food and drinks healthier

In this section of the survey, people were split into three separate samples, with a different approach taken in terms of the introduction of the concept of food reformulation, one with no elaboration on who was driving this potential change, one indicating that this was being driven by Government and one that it was being driven by food manufacturers. Figure *4* outlines the details included in each introduction. The purpose of the split sample was to ascertain whether an understanding about who was driving the change had any impact on the perceptions of these efforts in the minds of people.

Figure 4: Detail included in each introduction

Sample 1

- Next, we'd like to introduce you to the idea of making some food and drink products healthier by reducing the amount of sugar, salt, fat and/or calories that they contain.

Sample 2

- Next, we'd like to introduce you to the idea of making some food and drink products healthier by reducing the amount of sugar, salt, fat and/or calories that they contain. The Government is asking food manufacturers to make their products healthier (by reducing sugar, salt, fat and/or calories) which may include smaller portions for some types of foods.

Sample 3

- Next, we'd like to introduce you to the idea of making some food and drink products healthier by reducing the amount of sugar, salt, fat and/or calories that they contain. Food manufacturers are making their products healthier (by reducing sugar, salt, fat and/or calories), which may include smaller portions for some types of foods.

Awareness of efforts to make food and drink healthier by reducing the amount of sugar, salt, fat and/or calories or reducing portion sizes

Just under six in ten people (59%) on the island of Ireland state that they are aware of efforts to make food and drink healthier by reducing the amount of sugar, salt, fat and/or calories (Table *15*), while a significantly smaller proportion, 41% were aware of efforts to make food and drink healthier by reducing portion sizes (Table *16*).

Table 15: Awareness of efforts to make food and drink healthier by reducing the amount of sugar, salt, fat, and/or calories

Response	Respondents in island of Ireland	Respondents in Ireland	Respondents in Northern Ireland
Yes	59%	59%	62%
No	35%	36%	32%
Don't know	6%	6%	6%

Respondents were asked: Before today, were you aware of efforts to make food and drink products healthier by reducing the amount of sugar, salt or fat and/or calories that they contain? Base: 809 (all respondents on the island of Ireland), 509 (all respondents in Ireland), 300 (all respondents in Northern Ireland).

Table 16: Awareness of efforts to make food and drink healthier by reducing portion sizes

Response	Respondents in island of Ireland	Respondents in Ireland	Respondents in Northern Ireland
Yes	41%	41%	41%
No	52%	53%	50%
Don't know	6%	6%	9%

Respondents were asked: Before today, were you aware of efforts to make food and drink products healthier by reducing the portion size of certain types of foods? Base: 809 (all respondents on the island of Ireland), 509 (all respondents in Ireland), 300 (all respondents in Northern Ireland).

Attitudes toward efforts to make food and drink healthier by reducing the amount of sugar, salt, fat and/or calories or reducing portion sizes

People were asked about how positive or negative they feel about efforts to make food and drinks healthier by reducing the amount of sugar, salt, fat and/or calories on a scale of 1 to 10 where 1 is very negative and 10 is very positive, with this question replicated in relation to reducing portion sizes of certain types of food. The results supported the findings of the qualitative research as food reformulation (Table *17*) was viewed more positively than reducing portion sizes (Table *18*). Just over one quarter (26%) of people on the island of Ireland viewed food reformulation as being 'very positive' compared to 15% when it comes to reducing portion sizes. Conversely, 53% felt very negatively (1-6) to reducing portion size, while only 40% felt this way about reducing sugar, salt, fat, and/or calories. Broadening the scope to include generally positive scores (7-10) results in 59%.

Table 17: Positive or negative feelings about efforts to make food and drink healthier by reducing the amount of sugar, salt, fat and/or calories

Feeling	Percent of respondents
Very negative	40%

Neither positive nor negative	33%
Very positive	26%
Don't know	2%

Respondent were asked: On a scale of 1 - 10 where 1is very negative and 10 is very positive, how positive or negative do you feel about efforts to make food and drinks healthier by reducing the amount of sugar, salt, fat and/or calories? Base: 809 respondents on the island of Ireland.

Table 18: Positive or negative feelings about efforts to make food and drink healthier by reducing the portion size of certain types of foods

Feeling	Percent of respondents
Very negative	53%
Neither positive nor negative	30%
Very positive	15%
Don't know	2%

Respondent were asked: On a scale of 1 - 10 where 1is very negative and 10 is very positive, how positive or negative do you feel about efforts to make food and drinks healthier by reducing the portion size of certain types of foods? Base: 809 respondents on the island of Ireland.

Analysis of the data showed no significant different in the results based on the introduction shown to people shows i.e. either an introduction stating that the government were driving these changes, an introduction stating that food manufacturers were driving these changes or no introduction at all. A total of 24% of those shown the government introduction (base of 270), 24% of those shown the food manufacturers introduction (base of 261) and 29% of those shown no introduction (base of 278) felt very positive about efforts to make food and drink healthier by reducing the amount of sugar, salt, fat and/or calories. A total of 17% of those shown the government introduction (base of 270), 13% of those shown the food manufacturers introduction (base of 261) and 16% of those shown no introduction (base of 278) felt very positive about efforts to make food and drink healthier by reducing the portion size of certain types of foods.

Do people want to know about food reformulation?

Qualitative scoping

The qualitative phase of the research probed the question of reformulation under different scenarios in terms of the choices and information that may be provided on the shelf for people. The scenarios put forward utilised an example of how the decision-making process is simplified by the removal of choice in relation to variants of a product. The two scenarios put forward are presented in Figure *5*.

Figure 5: Qualitative scenarios

Scenario 1

The reduced salt and sugar sauce sits alongside the standard variant.

- In this case, customers assume that the manufacturer is offering an alternative for different buyers e.g. that there is a demand for a reduced salt and sugar variant that is popular. This packaging is often distinctive in terms of colour and design.
- In this scenario, the buyer chooses within the brand portfolio to 'standard' or 'reduced'.

Scenario 2

Product replaces old recipe.

- In this scenario, the customer arrives at the shelf to purchase a specific product for a specific purpose. The product itself has been reformulated but now sits within the traditional packaging. No reduced option exists. The customer picks up the product and continues their shopper journey.
- Within scenario 2 there is a further discussion about whether the reformulation that has occurred should be communicated on the product.

In the first scenario examined, it was found that there should be some communication about the change. It is common practice to keep the reformulated product separate from the standard product on the shelf to ensure consumer choice and eliminating this could potentially create confusion for people. The necessity for some form of differentiation is evident as long as both products are displayed side-by-side on the shelf. It should be noted that while reminders of the health benefits of the changes may create challenges in the commercial marketing realm, they are not considered unhelpful in peoples eyes. The presence of varied products on the shelf underscores the need for clear differentiation for customers.

In the second scenario examined, substitution of one product with another reduces the consumer's choice architecture. Under this scenario it was deemed unnecessary to maintain permanent communication about the change. The practice of communicating that a product has been altered for a limited time before returning to the original packaging design is not uncommon and while this may not directly influence decision-making, the consideration of a general message about food reformulation and its overall benefits is encouraged. This could be implemented through a stamp on the packaging for example. A segment of people, however, believe there is no necessity for this as the benefits are inherently integrated into the grocery channel.

Quantitative measurement

In the quantitative phase of the research, people were asked the following question about each product that they purchase occasionally or often. ‘Imagine that the products that you purchase, as listed, were changed to make them healthier by reducing the amount of sugar, salt, fat and/or calories that they contain. Which of the following statements comes closest to your view? I would prefer to know, I would prefer not to know, it wouldn’t make any difference’.

Most people expressed a preference for being informed, irrespective of the product (Table *19*). This result registers slightly higher for both breakfast cereal (67%) and yoghurt (65%), likely due to the importance attributed to health when buying these two items. An examination of the data across all product categories reveals that although a majority of people in Northern Ireland favour being informed, they are less likely to want to know than their counterparts in Ireland, this was also the case when it came to discussions on this matter in the qualitative focus groups.

Table 19: Consumer’s preference for information about reformulating products by reducing sugar, salt, fat and/or calorie content

Food item	Prefer to know	Prefer not to know	It wouldn't make any difference	Don't know	Prefer to know - Ireland	Prefer to know – Northern Ireland
Ice cream	56%	13%	25%	7%	57%	52%
Baked pastries and buns	59%	12%	24%	6%	60%	58%
Yoghurt	65%	10%	21%	4%	66%	62%
Cakes and desserts	60%	14%	21%	4%	64%	50%
Breakfast cereal	67%	8%	21%	4%	69%	60%
Biscuits	63%	11%	21%	5%	66%	56%

Question: Imagine that the products you purchase, as listed, were changed to make them healthier by reducing the amount of sugar, salt, fat, and/or calories they contain. Which of the following statements comes closest to your view? Base: All respondents: 809

The rationale behind peoples' preference for transparency about food reformulation is clear - the desire 'to be informed/know what I am eating' emerges as the top reason at 46%, significantly higher than the second most stated reason: 'to facilitate an informed purchasing decision' at 16% (Table *20*). This closely followed by the health-centric motivation 'to lead a healthier lifestyle/make healthier choices' at 14%.

Table 20: Reasons people would prefer to know food has been reformulated

Reason	Island of Ireland	Ireland	Northern Ireland
To be informed/know what I am eating	46%	47%	43%
So that I can make an informed decision to purchase or not	16%	14%	21%

To be healthier/make healthy choice	14%	12%	18%
So I'd know taste might change/understand taste change	10%	8%	14%
So I know I'm being healthier feel better about eating them	6%	6%	5%
Concerned about cost food manufacturers tryig to make money	4%	4%	4%
Family member has intolerances, allergy etc	4%	2%	2%
So I know what additives/substitutes are being used	3%	6%	6%
Other	7%	3%	3%

Question: What are the reasons why you would prefer to find out about any changes to products you buy? Base: All respondents who prefer to know: 619 (island of Ireland) 399 (Ireland), 220 (Northern Ireland)

Among the relatively small cohort of people who would prefer not to know (11% overall), just over one in five (22%) cited a lack of interest or indifference as their primary reason (Table *21*). A further 15% did not provide a specific rationale, while 11% noted the potential influence on their perception of the product's taste as a factor.

Table 21: Reasons people would prefer not to know food has been reformulated

Reason	Island of Ireland	Ireland	Northern Ireland
Not interested/ don't care	22%	18%	33%
I would know it tastes different/…	11%	11%	10%
It might put me off buying product	8%	9%	7%

If they taste the same/ I don't need to know	7%	8%	7%
If I don't know it doesn't matter	5%	3%	9%
Complicated/might not understand	4%	5%	2%
I'm not eating these things to be healthy	4%	5%	0%
I'm happy eating the way I do	3%	3%	4%
Label will state ingredients anyway	2%	3%	0%
Other	18%	20%	13%

Question: What are the reasons why you would prefer not to find out about any changes to products to buy? Base: All respondents who prefer not to know: 146 (island of Ireland), 90 (Ireland), 56 (Northern Ireland).

Advantages of food reformulation

The research indicates that people perceive the primary benefit of purchasing reformulated items to be their enhanced health value, irrespective of the product type (Table 22). This belief is most prevalent in relation to breakfast cereal at 60%, followed by yoghurt at 56%. The next most cited benefit of purchasing reformulated products is a reduced sense of guilt, with responses ranging from 35% for baked pastries to 18% for breakfast cereal. Roughly a fifth of people perceive an advantage in being able to procure their preferred product more often, a sentiment that increases to 25% among consumers of yoghurt and cakes/desserts. An equivalent proportion of people (approximately one in five) do not perceive any benefit in the reformulation of their regular products.

While the majority of people evidently acknowledge the advantages of reformulation, caution is advised around communication given that two of the top three perceived benefits of reformulation could potentially lead to increased consumption of the relevant products.

Table 22: Advantages of buying products if they had been reformulated

Advantages	Ice cream (469)	Baked pastries and buns (622)	Yoghurt (655)	Cakes and desserts (487)	Breakfast cereals (661)	Biscuits (688)
It would be healthier	47%	51%	56%	49%	60%	50%
I would not feel as guilty about buying them	34%	35%	20%	34%	18%	34%
I could buy it more frequently if the product was healthier	23%	21%	25%	25%	21%	22%
Other	<1%	<1%	1%	0%	<1%	1%

Question: What advantages, if any, do you think there would be, of buying regular products (as listed) if they had been reformulated? Base: All Respondents: 809

Concerns about food reformulation

The top two concerns about food reformulation are its potential impact on both taste and price (Table *23*). More than half of consumers of each product investigated by the research stated that they were concerned about the taste being affected, with concern levels highest for baked pastries and buns at 59%, closely followed by ice-cream (57%), cakes and desserts (56%) and biscuits (55%). 'It would be more expensive' was also a concern for just over half of consumers of each product, at 54% for baked pastries and buns and cakes and desserts, 52% for biscuits, 51% for both ice-cream and yoghurt and 50% for breakfast cereal. Approximately four in ten consumers noted concerns around these products being worse value for money and approximately one third are concerned that additives/non-natural ingredients would be added, a concern also voiced among participants of the qualitative discussion groups. Texture was noted as a concern for three in ten consumers of the products investigated.

Table 23: Concerns about buying products if they have been reformulated

Concerns	**Ice cream (469)**	**Baked pastries and buns (622)**	**Yoghurt (655)**	**Cakes and desserts (487)**	**Breakfast cereals (661)**	**Biscuits (688)**
The taste would be affected	57%	59%	52%	56%	52%	55%
It would be more expensive (higher price for the same sized item)	51%	54%	51%	54%	50%	52%
It would be worse value for money (smaller item for same price)	40%	42%	37%	39%	41%	40%
Additives/non-natural ingredients would be added	32%	34%	34%	30%	35%	30%
The texture would be affected	32%	32%	28%	29%	28%	29%
My children would notice the change and not want to eat it	9%	8%	9%	7%	10%	8%
My children would notice the change and not want to eat it	2%	2%	1%	2%	2%	2%
Other	<1%	1%	1%	0%	0%	0%
None of these/No concerns	8%	6%	10%	7%	10%	8%

Question: Now that we have told you about possible approaches to making food healthier, what concerns, if any, would you have about buying your regular products? Base: All respondents: 809

Most consumers (66%) agree that they have concerns about food manufacturers using efforts to make products healthier to make more money (Table *24*). This finding echoes the sentiment that was observed in the qualitative discussion groups where the issue of 'shrinkflation' was widely discussed – people noted that they are experiencing a combination of price increases on existing products alongside products reducing in size without the equivalent drop in pricing. The quantitative findings also provide evidence that concerns about food manufacturers using food reformulation to make more money exist across the board, with no significant differences recorded by region or based on the introduction provided to people in terms of who was driving efforts to make food and drinks healthier.

Table 24: Agreement with statement 'food manufacturers could use this to make more money'

Group of respondents	Strongly disagree (1-6)	(7-8)	Strongly agree (9-10)	Don't know
Island of Ireland	30%	32%	34%	4%
Ireland	29%	33%	33%	5%
Northern Ireland	34%	28%	37%	1%
No introduction	29%	34%	35%	3%
Government introduction	30%	30%	33%	7%
Food manufacturing introduction	32%	31%	34%	3%

Question: On a scale of 1-10 where 1 is you strongly disagree and 10 is you strongly agree, how much do you agree or disagree with the following statement about efforts to make food and drinks products healthier? This scale was chosen to create clear separation between positive, negative and neutral responses. Scores of 1-6 represent negative sentiment, 7-8 represent neutral sentiment, and 9-10 represent positive sentiment. Base: All respondents: 809.

Communicating about food that has been reformulated

Who should be responsible for communicating changes to products?

A significant majority (76%) of people who would like to know about product changes believe that this communication should come from food manufacturers (Table *25*). This sentiment is particularly strong among people in Northern Ireland, with a notable 85% advocating for manufacturer-led communication,13% of people feel that retailers should provide this information, while 11% believe this should fall under government responsibility. The data showed no variance based on the initial introduction provided to the respondents.

Table 25: Who should be primarily responsible for communicating product changes?

Responsible parties	**Island of Ireland (619)**	**Ireland (399)**	**Northern Ireland (220)**	**No intro (203)**	**Govt. Intro (210)**	**Food Manu. Intro (206)**
Government	11%	12%	7%	12%	11%	12%
Food manufacturers	76%	74%	85%	76%	75%	76%
Retailers	13%	14%	9%	12%	14%	13%

Question: Who should be primarily responsible for communicating any changes made to the products that you buy? Base: All respondents who prefer to know: 619 (IOI), 399 (Ireland), 220 (Northern Ireland), No introduction (203), government introduction (210), food manufacturer introduction (206).

How should product changes be communicated?

The most favoured method of communication regarding product changes is through labels on packaging (Table *26*). Three quarters of people would like to find out about changes from ‘a label on packaging telling me exactly what has changed’. A slightly lower percentage, 63%, agreed that they should be informed about a new recipe via ‘a label on packaging telling me there is a new recipe’. Other methods of communication also garnered some support. One third of people agreed that it should be communicated by way of information in-store and 30% supported advertising to communicate the change.

Table 26: Public preference for ways to find out about changes

Preferred mode	Island of Ireland	Ireland	Northern Ireland
Label telling exactly what has changed	75%	77%	71%
Label telling that there is a new recipe	63%	62%	64%
Information in store	33%	36%	26%
Advertising campaign	30%	32%	21%
Press release	10%	10%	8%
Other	1%	1%	0%

Question: How would you prefer to find out about any changes to products you buy? Base: All respondents who prefer to know: 619 (island of Ireland); 399 (Ireland), 220 (Northern Ireland).

Conclusions

There are several key findings from the research which have implications for those engage in reformulation policy, practice and communications.

Rating of personal eating habits demonstrates that there is a clear need for action

Based on the results from the quantitative research, it can be concluded that there is widespread acknowledgment among people that eating habits are not as healthy as they could be, with less than 10% rating their personal eating habits as very healthy. Likewise, relatively small proportions of parents (12%) and grandparents (17%) rate their children's and grandchildren's eating habits as very healthy.

These findings support the view that policies that encourage the food industry to reformulate their products by reducing unhealthy ingredients and portion sizes have a role to play in improving diets of both adults and children on the island of Ireland.

Broad awareness of efforts to make food and drinks healthier is evident

Almost six out of ten people (59%) on the island of Ireland are aware of efforts to make food and drinks healthier by reducing the amount of sugar, salt, fat and/or calories, while a smaller proportion, 41%, are aware of efforts to make food and drink healthier by reducing portion sizes.

Just under one third (32%) of people were found to have heard something about reducing sugar, salt, fat and calorie content in pre-packed or processed food, with those in Northern Ireland more likely to have heard something (44%) than those in the Republic of Ireland (27%). A smaller proportion of people recall hearing about reducing the portion size of pre-packed or processed food at 18%.

Among those who had heard something about reducing sugar, salt, fat and calorie content in pre-packed or processed food, the top mention in terms of what had been heard was 'It's better for you' at 16%, followed closely by 'it was mentioned in the media' at 13% and 'they are bad for you/cause ill health' at 10%. While a relatively wide spectrum of responses was observed, a broad comprehension of the key aspects of food reformulation is evident.

While six in ten people are aware of efforts to make food healthier, this finding demonstrates that there is scope to further expand awareness about these strategies through informational campaigns, should the Food Reformulation Task Force consider it necessary.

Food reformulation is positively viewed with a positive impact

Just over one quarter (26%) of people on the island of Ireland view food reformulation as being ‘very positive’ (9 to 10 score) with a majority (59%) viewing it as positive overall (7 to 10 score).

The research did not uncover any evidence to suggest that views on food reformulation are negatively impacted depending on who the drivers of the efforts are understood to be (either food manufacturers or Government). This finding indicates that the Government, in the guise of the Food Reformulation Task Force has scope under which to communicate with the public on this topic if desired.

The research also indicates that the health benefits of food reformulation are widely recognised with people perceiving the primary benefit of purchasing reformulated foods to be ‘it would be healthier’, irrespective of product type. This belief is most prevalent in relation to breakfast cereal at 60%, followed by yoghurt at 56%.

However, the next most cited benefit of purchasing reformulated products is a reduced sense of guilt, with responses ranging from 35% for baked pastries to 18% for breakfast cereal and approximately one fifth of people perceive an advantage in being able to procure their preferred product more often, a sentiment that increases to 25% among consumers of yoghurt and cakes/desserts.

These two perceived advantages may give rise to people opting to consume more of reformulated product than would otherwise have been the case. For this reason, careful communication about the purpose and benefits of reformulation will be required.

Nutrient reduction is preferable to reduced portion sizes

The findings from both the qualitative and quantitative research clearly indicate that people view food reformulation more positively than reduced portion sizes. Just over one quarter (26%) of people on the island of Ireland viewed food reformulation as being ‘very positive’ compared to 15% when it comes to reducing portion sizes. However, it is noteworthy that over half of the respondents (53%) had a very negative perception (rated 1-6) towards reducing portion sizes, while only 40% fell into this category when it came to reducing the content of sugar, salt, fat, and/or calories in pre-packaged and processed food.

The qualitative research shed light on the fact that the negative perspective on reduced portion sizes was due to peoples’ view that these changes were commercially driven rather than being health initiatives. Given that not all cases of portion size reduction are associated with food reformulation, communication of the health benefits driving this type of change to people poses a significant challenge.

Information about reformulated products is preferable but needs to be placed in context

In the quantitative study, most people stated that they would prefer to know if the food that they purchase occasionally or often is changed, irrespective of the product type. This result registers slightly higher for both breakfast cereal (67%) and yoghurt (65%), likely due to the importance attributed to health when buying these two items.

The rationale behind peoples' preference for transparency about food reformulation is clear - the desire 'to be informed/know what I am eating' emerges as the top reason at 46%, significantly higher than the second most stated reason: 'to facilitate an informed purchasing decision' at 16%. This closely followed by the health-centric motivation 'to lead a healthier lifestyle/make healthier choices' at 14%.

While most people claim that they to want to know about changes to their food, the qualitative study helps us to understand peoples’ expectations about these changes and reveals some nuance to their perspective. The qualitative research uncovered:

- That people assume that changes to food products will be significant – a 15% reduction in fat for example rather than a 1.5% reduction.
- That smaller changes to food products are less likely to be perceived as having an impact on taste and are less likely to be perceived as having a positive health impact.
- That people assume that changes to products will occur in a single step and not in a series of small changes.
- That gradual changes to food products over several years makes labelling changes complicated because people queried how long the changes should be communicated on packs for.

- That people assume that the change potentially relates to a new line e.g. reduced fat or sugar does not change the existing product on the shelf.
- If they assume there is a new variant, the presence of the information about changes to the product becomes more relevant to the decision-making process.
- People place greater value on this information being shown on packs if it enables them to decide at the shelf about one product versus another. When the changes are subtle or relate to existing rather than new lines, the requirement for knowledge is reduced.

Manufacturers should be responsible for communication about reformulation and should communicate this information via labelling

A significant majority (76%) of people who would like to know about product changes believe that this communication should come from food manufacturers. This sentiment is particularly strong among people in Northern Ireland, with a notable 85% advocating for manufacturer-led communication. An additional 13% of people feel that retailers should provide this information, while 11% believe this should fall under government purview. The data showed no variance based on the initial introduction provided to the respondents.

The most favoured method of communication regarding product changes is through labels on packaging. Three quarters of people would like to find out about changes from ‘a label on packaging telling me exactly what has changed’. A slightly lower percentage, 63%, agreed that they should be informed about a new recipe via ‘a label on packaging telling me there is a new recipe’.

While food reformulation is viewed positively, people still have concerns

The research demonstrates that while food reformulation is viewed positively, people do have concerns about it, regardless of the product in question. The top concerns noted were around taste, price and value for money.

More than half of consumers of each product investigated by the research stated that they were concerned about the taste being affected, with concern levels highest for baked pastries and buns at 59%, closely followed by ice-cream (57%), cakes and desserts (56%) and biscuits (55%).

‘It would be more expensive’ was also a concern for just over half of consumers of each product, at 54% for baked pastries and buns and cakes and desserts, 52% for biscuits, 51% for both ice-cream and yoghurt and 50% for breakfast cereal.

Approximately four in ten people noted concerns around these products being worse value for money. Approximately one third are concerned that additives/non-natural ingredients would be added, a concern also voiced among participants of the qualitative discussion groups. Texture was noted as a concern for three in ten consumers of the products investigated.

The concerns around price and value for money are most likely impacted by the cost-of-living crisis that continues to loom large on the island of Ireland. The majority of people (66%) agree that they have concerns about food manufacturers using efforts to make products healthier as a way to make more money.

This finding echoes the sentiment that was observed in the qualitative discussion groups where the issue of ‘shrinkflation’ was widely discussed, people noted that they are experiencing a combination of price increases on existing products alongside products reducing in size without the equivalent drop in pricing.

It is crucial that any food reformulation policy aims to address the concerns from members of the public around price, taste and value for money.