

Wave 8 Executive Summary

The Food Standards Agency (FSA or Agency) monitors marketing campaign activity regularly using TNS BMRB's online omnibus survey. The latest survey was conducted amongst an online panel in England, Wales and Northern Ireland and was completed by 2694 adults aged 16+ between the 3rd and 17th March 2016. The sample has been weighted to represent the adult population of England, Wales and Northern Ireland.

As well as looking at general perceptions and awareness about food safety, the survey also looks at the reach and recall of our campaigns. We monitor campaign key performance indicators (KPIs) around awareness, concern, and propensity to share information and change behaviours as a result of our campaign activity. We also track the effects of our publicity and see how behaviour and awareness differs between those who can recall FSA campaign publicity and those who cannot recall any media activity.

As well as general food poisoning, the areas of focus for the Food Standards Agency are as follows.

Campylobacter Food Poisoning

The Chicken Challenge is a campaign to raise awareness around the issue of Campylobacter. Campylobacter is a type of food poisoning most often found in poultry. We monitor prompted awareness of campylobacter and the percentage of consumers more concerned about this type of food poisoning in particular. Furthermore, we look to track the consumer view as to whether industry should do more about the issue of campylobacter.

Food Hygiene Rating Scheme (FHRS)

Our Food Hygiene Rating Scheme (FHRS) helps you to choose where to eat out or shop for food by giving you information via a rating about the hygiene standards in restaurants, pubs, cafés, takeaways, hotels and other places you eat, as well as supermarkets and other food shops. Currently, food businesses in England and Scotland are not obliged to display their sticker as opposed to Wales where it was made mandatory in November 2013. We track awareness of the scheme, use of the scheme within the last 12 months and propensity to use it in the next 12 months. Additionally, we monitor the proportion of consumers who have looked for the sticker when eating out – either inside or outside the premises.

Allergens

Awareness and confidence in the new legislation on how food businesses display information about allergens is also monitored, which was introduced in December 2014. This equips consumers with specific knowledge about the allergens in food they are buying and or consuming. We also monitor consumer confidence in asking for allergen information when eating out. In Waves 1 and 2 of the Campaign Tracker we looked at comparing the

omnibus results with Allergy UK members (see Annex A) to get a fair representation of the population who have allergies which relates to around 2% of people.

Our Food Future

An emerging focus for the Agency will be to look at consumers' views on the future of our food system. In light of this, several questions have been introduced to the questionnaire to provide the FSA with a baseline and this area is now included within our KPIs. We look to see if consumers feel they have access to an affordable, healthy diet and if enough information is available to them about what is in their food and where it comes from.

Food Fraud

To mitigate food crime threats to consumers, the National Food Crime Unit was established within the FSA in 2015. They work with partners to protect consumers from food and drink that is either unsafe or not authentic because of serious criminal activity. This wave of the campaign tracker sought to establish a baseline in this area, looking at the consumer view of authenticity of food and the effectiveness of the authorities at preventing food fraud.

Rare Burgers

Additionally, in this wave we included a section on Rare Burgers. The FSA considers this a 'risky food' and is keen to develop understanding from consumers in this area. Questions were asked to respondents on frequency of eating burgers, preferences in eating rare/medium and well-done burgers and reasons for this.

The following summary presents top-line findings from in-house analysis. Previous waves of the Campylobacter survey in May, June and November 2014 were conducted with the TNS random location face-to-face omnibus surveys. Previous waves of the FHRS tracker questions were conducted as an online survey in December 2014, February 2015 and May 2015. Questions on allergens pertain to a small section of society so we backed up our tracking with a sample of people with allergens, working in partnership with Allergy UK, to monitor the impact of our campaign in 2014.

We consolidated our methodologies in May 2015, using an online omnibus through TNS and will be using this methodology in the future.

Key Findings

General Food Poisoning

The food poisoning types most heard of were Salmonella (92%, unchanged since Nov 2015 and down 2% since Sept 2015), E-coli (89%, unchanged since Nov 2015 and down 3% since Sept 2015) and Norovirus (65%, up 3% since Nov 2015). 31% of respondents were aware of

Campylobacter, when prompted, as a source of food poisoning, compared to 30% in Nov 2015 and 33% in Sept 2015.

84% of people cited raw chicken or turkey as the most likely food to get food poisoning from. This was followed by Shellfish (60%), Reheated takeaway food (56%) and Eggs (39%).

Cooking food thoroughly (85%), hand washing (81%) and preparing different types of foods on different types of chopping boards (72%) are noted as the best ways to avoid food poisoning.

Campylobacter Food Poisoning

28% of people claimed to have recently seen, heard or read publicity helping them to avoid food poisoning from Campylobacter or chicken, whilst 64% did not recall publicity. Of those who could recall publicity about avoiding food poisoning from Campylobacter, 78% said they would buy chicken just as they always had compared to 75% who had not seen any publicity.

Concern about campylobacter has dropped 4% to 35% since Nov 2015. Just over half (54%) of all respondents wanted to know more about how to avoid food poisoning from chicken, down 5% since Nov 2015. The proportion of consumers stating they will share information about avoiding campylobacter is now back at almost its highest level of 59% after dropping to 51% in Nov 2015, and 49% in Sept 2015.

58% of the sample thought industry should do more about campylobacter, down 1% since Nov 2015.

Food Hygiene Rating Scheme (FHRS)

Prompted awareness of the Food Hygiene Rating Scheme was up 1% since Sept and Nov 2015 at 72%. 41% of participants said they had used the FHRS scheme in the last 12 months to check a food establishment's hygiene standards before deciding to visit, up 2% since Sept 2015. Over half (60%) stated they will likely use the FHRS to check food hygiene ratings in the next 12 months.

We also wanted to learn how respondents were checking the rating of the premises they visited. 82% reported that the method used to check the rating was by either checking for a sticker or certificate in the window/door or by entering inside the premises (unchanged since Nov 2015) and 20% accessed the food.gov.uk/ratings website to find out this information (down 25 since Nov 2015). The percentage of respondents who believe it should be mandatory for FHRS to be displayed was 85%, unchanged since May and Sept 2015.

Allergens

The new EU Food Information for Consumers Regulation was introduced in December 2014. This means that any of the 14 main allergens that are on the regulatory lists are to be emphasised on the label and information about allergenic ingredients are to be located in a single place. 8% of respondents knew about the changes in rules regarding allergens. For those who could recall allergen publicity this figure was 34%, whilst for those who could not the percentage was 4%.

13% of respondents had seen, heard or read publicity activity regarding this topic.

Overall confidence in asking staff members for information about ingredients in food they were selling because of a concern about possible allergies or intolerances was high at 38%, down 1% since Nov 2015. Confidence to ask for allergen information was slightly higher in those who said they had seen publicity (41% confidence level in those who could recall activity, 39% for those who could not recall activity). Over half of all respondents would be confident enough to ask staff for allergen information in a coffee shop, café, sandwich place and restaurant. Confidence to ask for allergy information in a takeaway place was 44%, with 28% being unconfident asking.

Our Food Future

63% of respondents feel that they have enough information about what is in their food, down 3% since Nov 2015. 57% feel they have adequate information about where their food comes from and 78% of respondents (down 3% since Nov 2015) feel empowered enough to make decisions about what they eat and why they eat it. Over two thirds (70%) feel that they have access to an affordable, healthy diet and 65% think this accessibility will continue into the future. 63% are conscious of the wider impact of the food choices they make.

Food Fraud

Over half of respondents (57%) feel that food is what it says it is and has accurate labelling. 44% think the authorities are effectively preventing and detecting food fraud and 56% trust the authenticity of the food they buy and eat.

Rare Burgers

As an opening question, respondents were asked for their frequency of eating rare/medium burgers – 71% claimed never to eat them, whilst 11% said once a month. When asked about frequency of eating rare/medium burgers at home, 40% stated once a month. Out of the home, claimed frequency of eating pink burgers once a month was 35%.

Consumption of rare/medium burgers versus 2 years ago was relatively unchanged e.g. 40% didn't and still don't eat them. 19% less respondents now eat well-done burgers, but it is

not obvious or clear that this change in preference has indicated they are more likely to eat a rare/medium burger.

44% of respondents eat a pink burger in a restaurant specialising in burgers, followed by gastro-pubs (31%) and fast-food outlets (25%)

At home, 54% prefer well-done burgers and claimed they would refuse to eat a pink burger/cook it more. 12% would accept a rare/medium burger (accepters) Preferring well done burgers (30%) and having little or reduced confidence in the safety of eating rare burgers at home (23%) were cited as the main pushbacks to pink burgers. Out of the home, 53% claim they would reject a rare burger and would send it back. 13% were considered rare burger accepters.

42% agreed that eating a rare/medium burger rather than a well-done burger could result in serious illness or death and 45% disagreed that beef burgers are safe to eat if the centre is still pink.

34% of respondents believed restaurants would not offer rare/medium burgers on their menus if they were not safe.

53% disagreed that they would be prepared to take the risk of eating rare/ medium burgers. There were disparities between respondents who thought that it must be safe to eat beef burgers cooked rare or medium in restaurants if there were strict procedures in place (30% agreed) and those who thought it wouldn't be safe to eat (28%). 42% disagreed that eating rare/ medium burgers in restaurants would be safer than eating them at home.

Annex A – Our KPIs

Campylobacter

* This figure is of the 938 people/ 35% aware of campylobacter

Overall Campaign Performance Indicators	Wave 1 May 14	Wave 2 Jun 14	Wave 3 Nov 14	Wave 4 May 15	Wave 5 Sept 15	Wave 6 Nov 15	Wave 7 Mar 16
Prompted awareness of Campylobacter as a source of food poisoning	19%	20%	23%	35%	33%	30%	31%
More concerned about campylobacter in particular	29%	19%	39%	29%*	37%	39%	35%
Prep and cook chicken just as I have always done/ Buy chicken just as I have always done	68%	70%	77%	74%*	77%	76%	74%
Shared info on not washing raw chicken / how to avoid Campy	61%	48%	59%	52%*	49%	51%	59%
Industry should do more about campylobacter	-	-	-	-	-	59%	58%

Food Hygiene Rating Scheme (FHRS)

Overall Campaign Performance Indicators	Wave 1 Feb 14	Wave 2 Nov 14	Wave 3 Dec 14	Wave 4 Feb 15	Wave 5 May 15	Wave 6 Sept 15	Wave 7 Nov 15	Wave 8 Mar 16
Awareness of rating scheme	37%	51%	53%	55%	63%	71%	71%	72%
Have checked rating scheme	41%	38%	42%	43%	37%	39%	39%	41%
Shared information on rating scheme	51%	46%	45%	48%	44%	40%	42%	40%
Likely to use FHRS in the future	-	61%	61%	67%	60%	62%	62%	60%
In favour of mandatory display	-	-	88%	93%	85%	85%	85%	85%
Looked for the sticker inside/outside premises	-	-	-	-	-	80%	82%	82%

Annex A – Our KPIs

Allergens									
*Confidence in all venues									
Overall Campaign Performance Indicators	Wave 1 May 14		Wave 2 June 14		Wave 3 March 15	Wave 4 May 15	Wave 5 Sept 15	Wave 6 Nov 15	Wave 7 Mar 16
	Omnibus	Allergy UK Members	Omnibus	Allergy UK Members	Omnibus	Omnibus	Omnibus	Omnibus	Omnibus
Awareness of new rules about allergens	9%	47%	15%	74%	29%	7%	8%	10%	8%
Awareness of publicity about changes to rules	-	-	-	-	16%	10%	10%	13%	13%
Confidence to ask staff members for information regarding ingredients in food they are selling (NET)	-	59%	-	63%	-	36%*	38%*	39%	38%

Our Food Future		
Overall Campaign Performance Indicators	Nov 15	Mar 16
Enough info about what is in my food	66%	63%
Enough info about where my food comes from	57%	57%
Empowered to make decisions about what I eat and why	81%	78%

Annex A – Our KPI's

Food Fraud	
Overall Performance Indicators	Mar 16
Food is what it says it is and is accurately labelled	57%
The authorities are effectively preventing & detective food fraud	44%
I trust the authenticity of the food I buy & eat	56%