

AHEAD OF WHAT'S NEXT.

New Allergy Regulations Study

Pre and Post Research Findings

February 2015

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Background

- The FSA wanted to track awareness of the new EU FIC allergen information regulations before and after they came into force in December 2014. The regulations concern how allergy information is displayed on pre-packaged and loose food as well as how it is provided in restaurants, takeaways and all eating establishments.
- To achieve this objective, Harris proposed the use of a **two phased online methodology before and after** the regulations came into effect.
 - The pre-wave of the survey was conducted between 18th and 28th November 2014 before the regulations came into effect.
 - The post-wave of the survey was conducted between 2nd and 12th February 2015 after the regulations came into effect.
- Each wave was conducted with two separate audiences :
 1. A survey of the **general public** on the Harris Interactive online **Omnibus** panel
 - This allowed us to understand the overall awareness of the regulations among the whole UK population.
 2. A survey among people registered on the **Allergy UK database**
 - This allowed us to gain a larger number of interviews among consumers or food allergic or intolerant individuals in order to understand the views of those directly affected by the new regulations.
- This report brings together the findings from both waves *(please note a separate report is available on the pre-wave)*

Background : The Harris Interactive Omnibus Panel

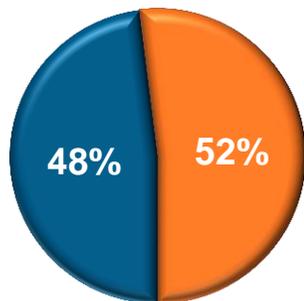
- In the post-wave, we conducted an online Omnibus survey with 2,086 adults aged 16+ across England, Scotland, Wales and Northern Ireland. (2,099 interviews in wave 1)
- The Harris Interactive Omnibus consists of members of the general public who have opted in and voluntarily agreed to participate in online research studies. Through careful recruitment and management, we are able to rapidly survey large numbers of the general population to represent the views of the nation.
- We have over 400,000 active panellists in the UK and our panel is used solely for market and opinion research. Members are contacted at random and invited to take part in a survey.



Respondent Profile : Omnibus Audience: a representative sample

- In each wave, the results of the Omnibus study were weighted to best reflect the size and shape of the population of the UK meaning **the results are comparable across each wave**.
- This means that the results of the Omnibus reflect an audience that is as true as possible of the population with the same age, gender and regional profile. The audience profile is detailed below (wave 1 audience profile can be found in the appendix)
- Of course not everyone in GB has internet access, but online panel research results are considered to be extremely accurate. In fact, according to the British Polling Council, Harris Interactive was the most accurate *online* polling company during the last UK elections in 2010: <http://www.britishpollingcouncil.org/press100508.html>

Gender



■ Men
■ Women

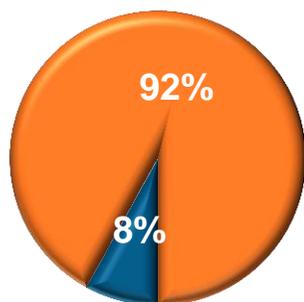
Age



Respondent Profile : Allergy UK members : an engaged sample

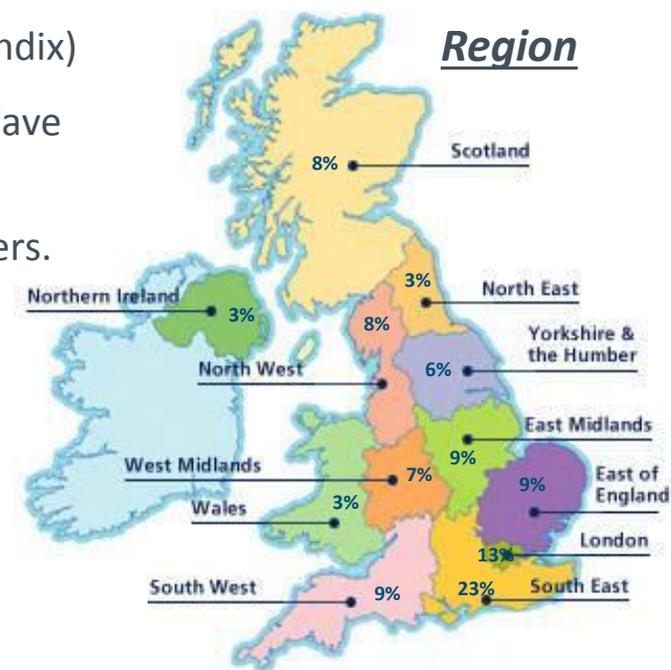
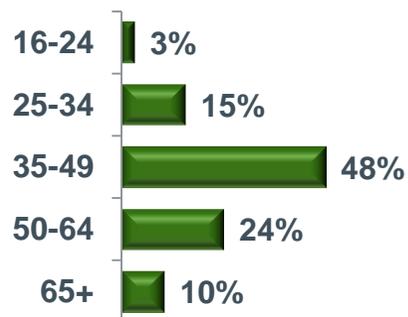
- Allergy UK hold a database of over 12,000 consumers who are food allergic or intolerant. This is an audience who are going to be more engaged with the topic of food allergies and intolerances.
- Allergy UK sent out 2 emails (an initial mail-out and one reminder) to 6,260 members of its database inviting them to undertake the survey hosted by Harris Interactive.
- A total of 391 responses were achieved, a response rate of 6.2%.
- The profile of respondents is below (the profile for wave 1 is in the appendix)
- Please note there are no major differences in respondent profile from Wave 1 to Wave 2.
- The respondents of Wave 1 and Wave 2 are made up of different members.

Gender



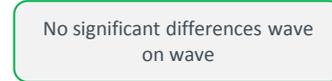
■ Men
■ Women

Age

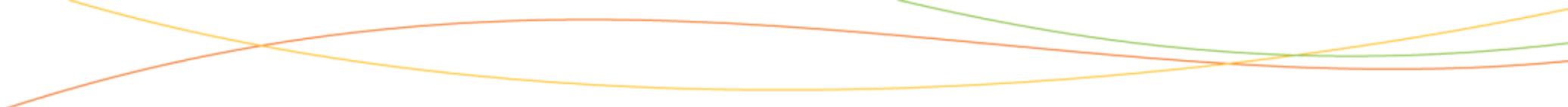


About this report

Throughout this report, data has been significance tested at 95% confidence levels. Any statistical difference between the pre-wave and post-wave data has been marked with a green or red arrow. A key is available on each slide where differences are marked.



Where **pre-wave** data is comparable, this is shown in **green**. **Post-wave** data is shown in **blue** or in chart format.



Executive Summary

Executive Summary – General Public (Omnibus Audience)

- As seen in the pre-wave, when compared to Allergy UK members, the general public are much less likely to:
 - Be food allergic or intolerant (either themselves or someone they regularly eat out with)
 - Have heard of the 14 allergens before taking the survey
 - Have heard of the new allergen regulations
 - Have noticed signage or information about the new regulations in the past 6 months
- There have been **significant increases** amongst the general public since the pre-wave on the two questions below:

Before today, were you aware of this new EU 'Food Information and Consumers Regulation' coming into effect?

Awareness of the new regulations amongst the general public has increased significantly from 9% to 15% highlighting the cut-through of publicity around these new regulations

Have you noticed signage or information in the past six months in coffee shops, restaurants, cafes, sandwich places, takeaways etc which explains allergen information about the food they are serving or tells you that you can now ask for allergen information?

The proportion who have noticed allergen signage has increased significantly from 15% to 21% which is a positive sign that reflects how the new regulations are being implemented and that there is stand-out amongst consumers

Executive Summary – Allergy UK Members (1 of 2)

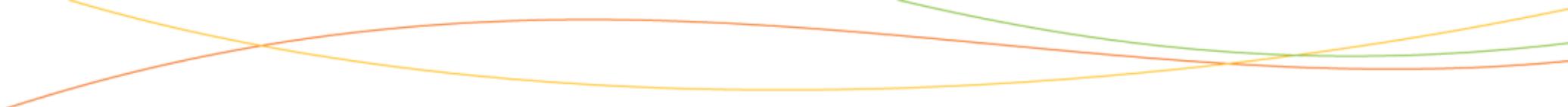
- **Awareness of the 14 allergens** remains constant across both waves
 - Lesser known allergens Celery and Sulphur Dioxide grew in awareness by 8pts and 6pts respectively
- **Awareness of FIC** increased significantly to 74% (from 47% in the pre-wave) reflecting the success of publicity and media campaigns in highlighting the new regulations to the target audience
 - Allergy UK remains the leading source for finding out about the new regulation (65% vs. 57% last wave). This reinforces the importance of this channel when engaging with impacted consumers on this topic.
 - ‘On TV’ was cited much more frequently this wave with a significant increase (+12pts to 15%) indicating that TV coverage of the new regulations was picked up by a minority of this target audience
 - The average number of sources mentioned has increased significantly from 1.6 to 1.9 reflecting the widespread coverage this topic had in the UK media
- **Awareness of signage** or information explaining allergen information in the past 6 months increased significantly to 42% from 27% which is a strong positive increase amongst this key audience
 - But this still means that the majority (51%) did not see any signage about allergen information highlighting that more can still be done to further drive the prominence of signage in eating establishments
 - Despite the new regulations, there has been no change in perceptions of how clear allergen information is when eating out and 23% find the information unclear. Further steps may be needed to understand how this can be addressed.
- Since FIC came into effect 53% are now **more likely to eat** out as a consequence of the new regulations.

Executive Summary – Allergy UK Members (2 of 2)

- The most common way of **accessing allergen information** was by **asking a member of staff** (72%)
 - 63% felt confident in asking staff about ingredients (compared to 59% last wave)
 - However we also see 33% who do not feel more confident in asking a member of staff about ingredients since FIC came into effect – this may be due to negative experiences they have had so far or could simply be due to low levels of confidence in staff training. It is certainly a measure to monitor over time in the hope that this figure reduces.
 - 80% frequently or always ask staff for information on food ingredients and this remains stable pre and post the new regulations
- **Attitudes to eating out** have seen some significant improvements amongst Allergy UK members reflecting some of the positive impact that FIC is having amongst this group. That being said, some of these figures are still very low and need further focus.
 - Noticing information about allergens when eating out increased from 38% to 53%
 - Confidence that allergen information is reliable increased from 13% to 20%
 - Believing that allergen rules are effective at protecting consumers rose from 11% to 16%
- We also saw some encouraging shifts in results for the below, again reflecting the progress FIC is starting to have:
 - 5% fewer agreed ‘I avoid buying food on the go due to concerns about food ingredients’ (65% in the post-wave)
 - 7% fewer said ‘I find the information provided from food businesses on food allergens confusing’ (50% in the post-wave)

Executive Summary – Conclusions

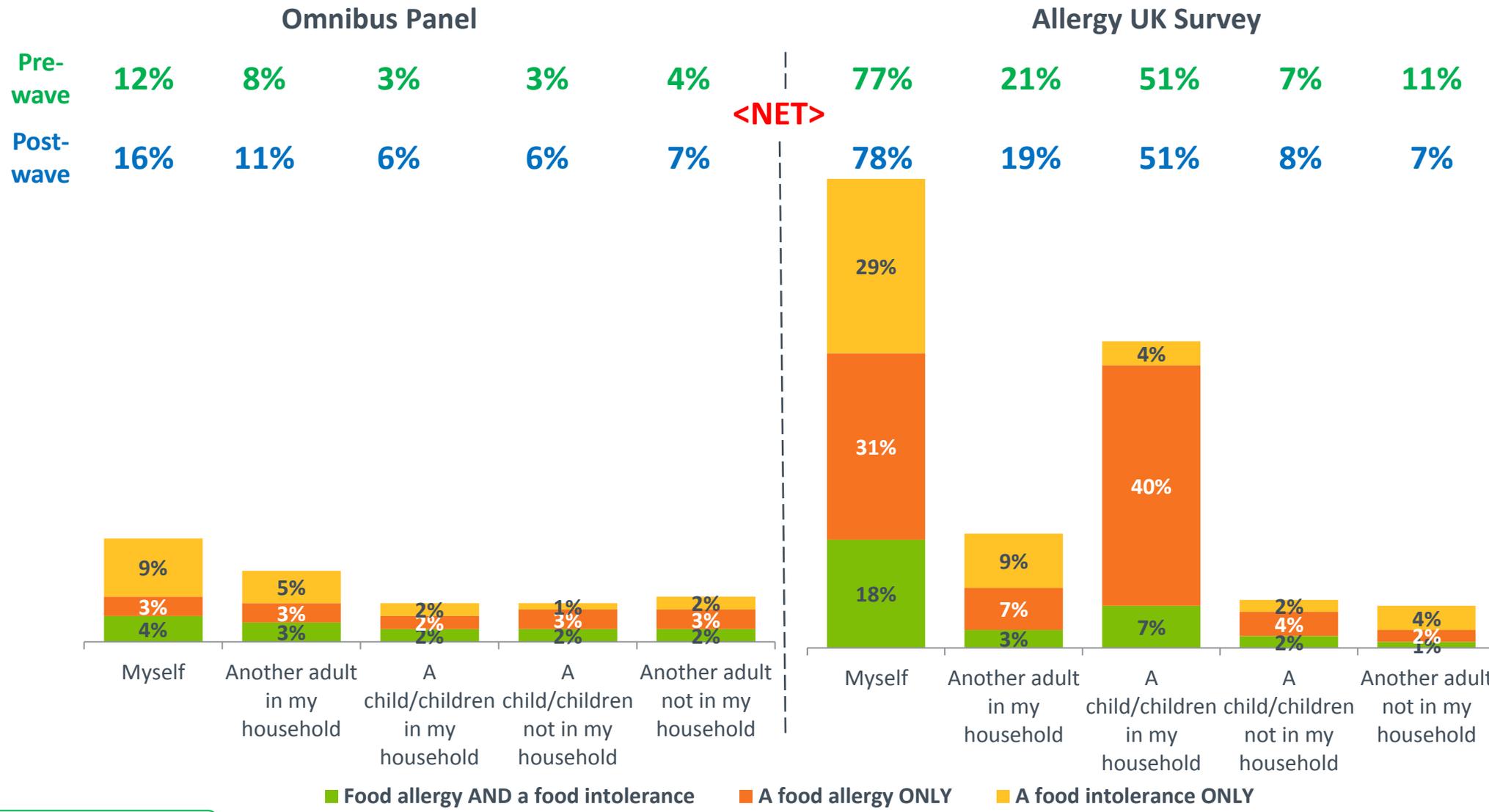
- It appears that food businesses are displaying more information/signage about allergens in the foods they provide and that Allergy UK members are starting to feel safer and more confident overall
- Confidence to ask a member of staff for allergen information has increased which suggests that FIC has empowered consumers
- Despite this, many of the attitudinal scores reflect an ongoing lack of confidence or trust in food allergen labelling despite the new FIC regulations, indicating that more needs to be done to reassure food allergic or intolerant individuals. This is furthered by the number of respondents saying that FIC will make no difference to their eating out habits.
- This could be due to a number of factors such as:
 - consumers still having to ask for allergen information
 - allergen information not being prominently displayed or unclear
 - consumers having low confidence that the information they receive will be correct
 - food businesses still adjusting to the new regulations
- For the FSA overall, this means that publicity campaigns so far have had good cut-through amongst both the general public and Allergy UK members, but more can still be done to make the public aware of their rights when it comes to allergens in food.



Section 1 : Questions asked to both the Harris Interactive Omnibus Panel and Allergy UK Members

The proportion of food allergic or intolerant individuals remained constant amongst Allergy UK members whilst the Omnibus sample saw some minor increases

Who has a food intolerance or allergy



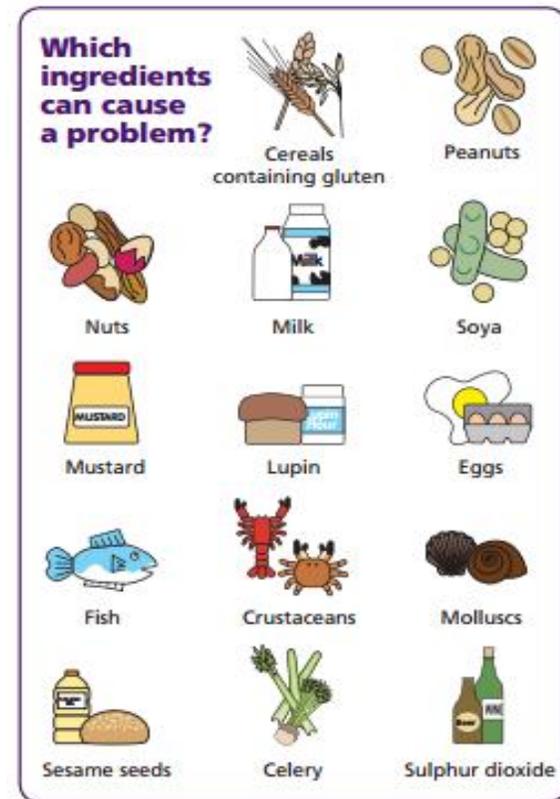
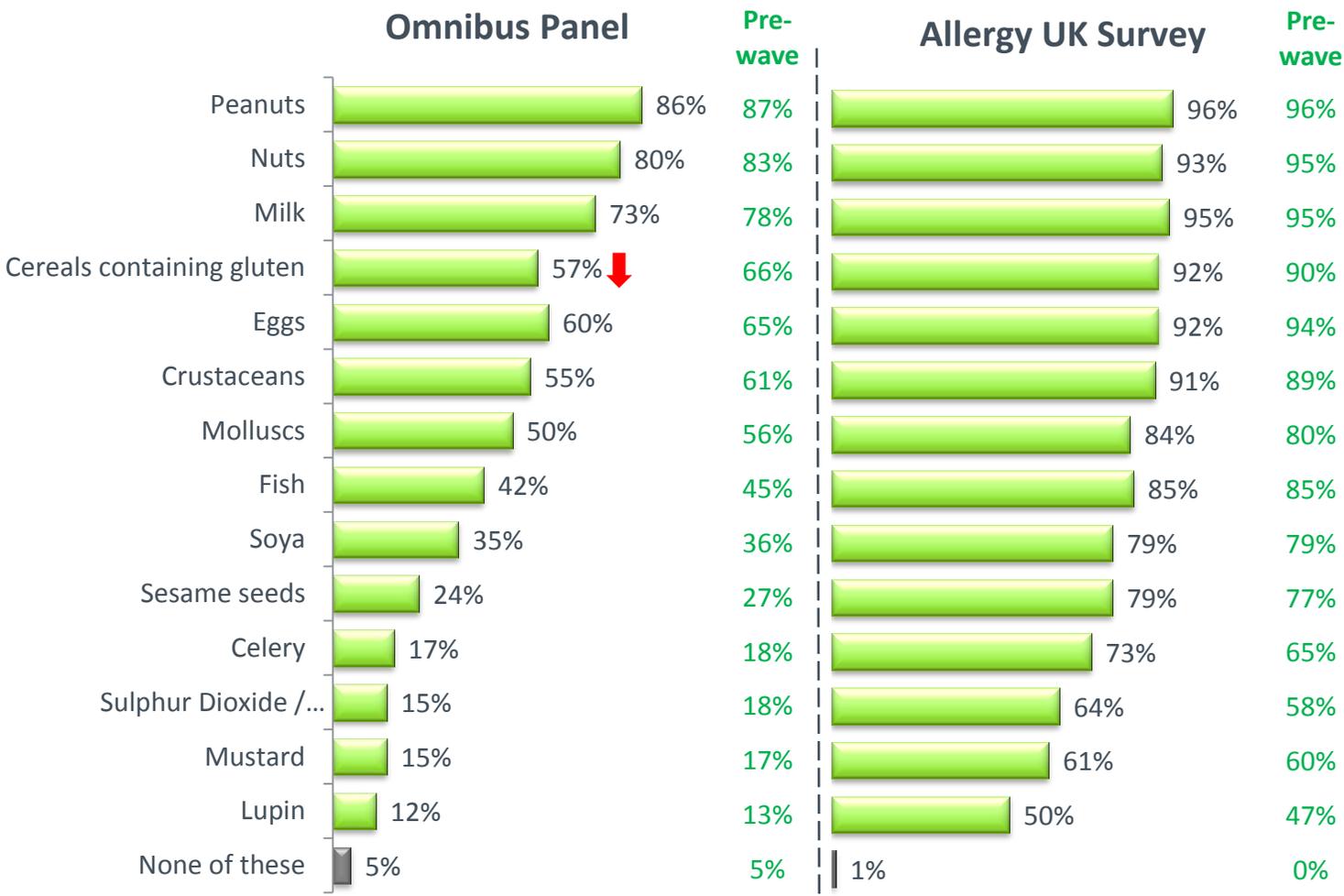
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No significant differences wave on wave

(Q1) Do you or anyone that you regularly eat out with or buy food/drink for, have food allergies or intolerances, based on the definitions below.
 Base: All respondents Allergy UK Survey (pre-wave 346, post-wave 391), Omnibus Survey (pre-wave 2099, post-wave 2086)

Awareness of the 14 allergens remains broadly consistent across both audiences and peanuts and nuts remain the most commonly known allergens

Allergens heard of before today



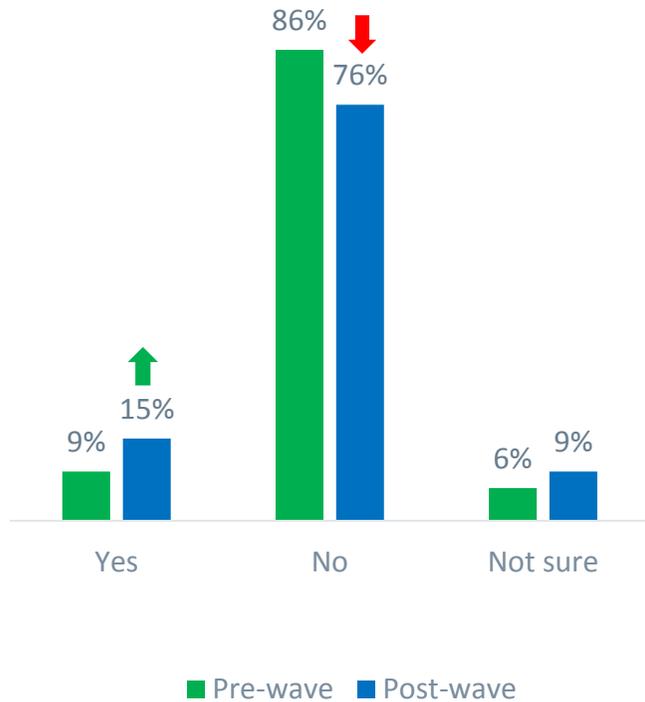
↑ ↓ Arrows indicate significant change from previous wave

(Q2) Which of the following allergens had you heard of before today?
 Base: All respondents – Allergy UK Survey (pre-wave 346, post-wave 391), Omnibus Panel (pre-wave 2099, post-wave 2086)

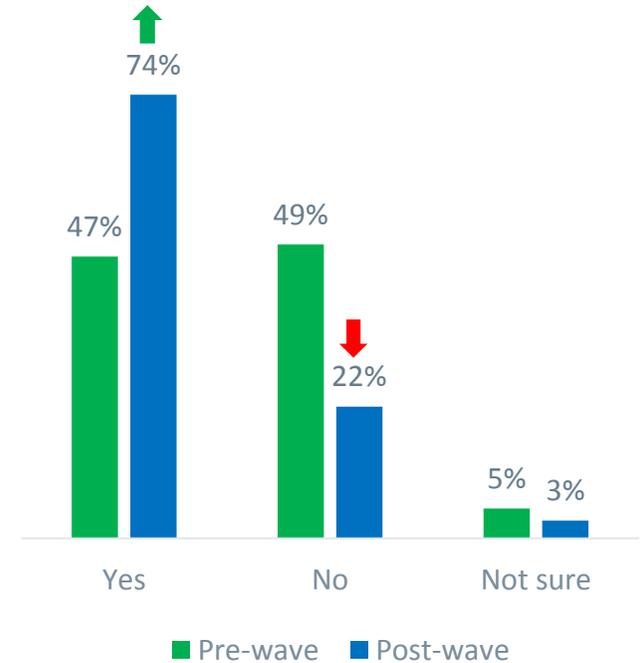
Awareness of the new allergen regulations has increased significantly across both audiences; 74% are now aware in the Allergy UK sample. Despite these increases, awareness remains low amongst the general public at just 15%.

Awareness of new EU 'Food Information and Consumers Regulation' coming into effect

Omnibus Panel



Allergy UK Survey



↑ ↓ Arrows indicate significant change from previous wave

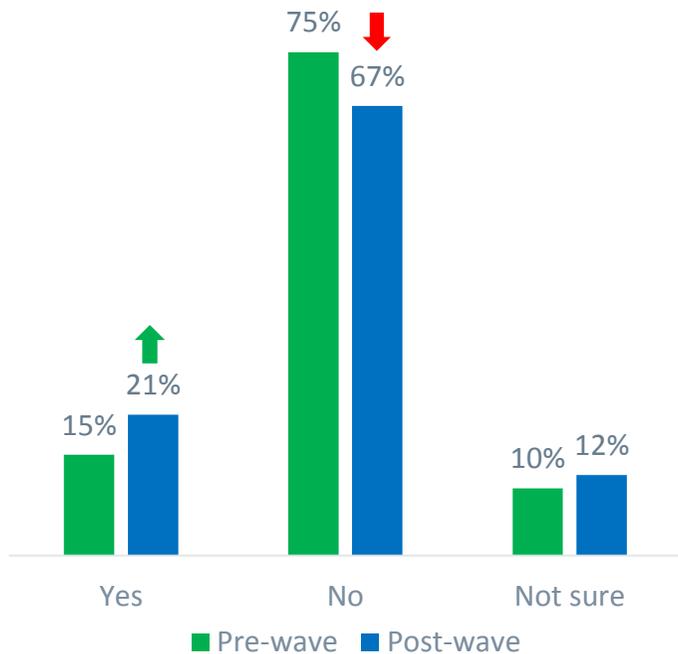
(Q5) Before today, were you aware of this new EU 'Food Information and Consumers Regulation' coming into effect?
 Base: All respondents – Allergy UK Survey (pre-wave 346, post-wave 391), Omnibus Panel (pre-wave 2099, post-wave 2086)

21% of the general public and 42% of the Allergy UK sample have noticed allergen signage in the past six months – both are significant increases from the pre-wave

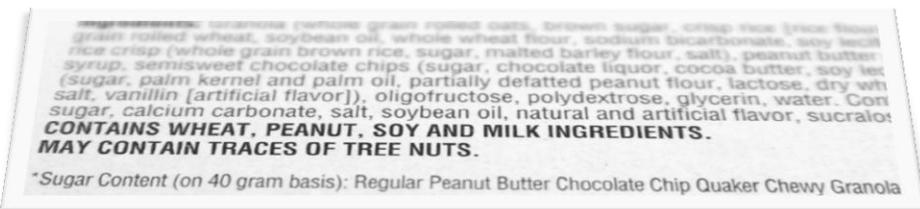
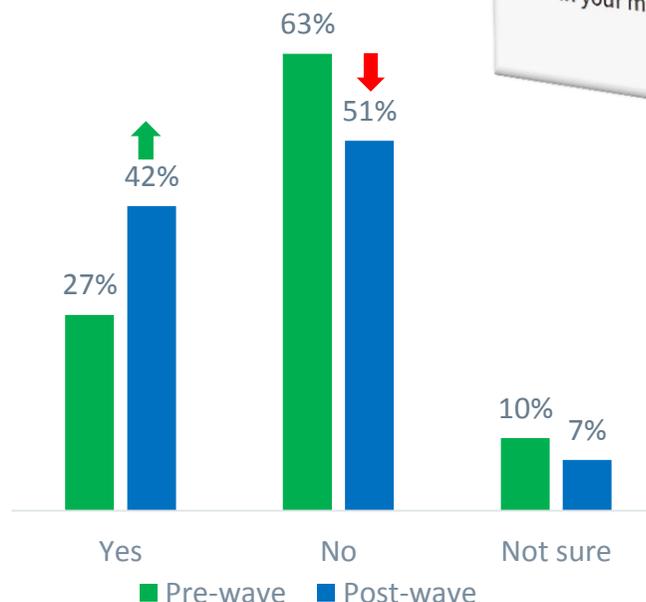
Awareness of signage or information explaining allergen information in the past 6 months



Omnibus Panel



Allergy UK Survey



(Q8) Have you noticed signage or information in the past six months in coffee shops, restaurants, cafes, sandwich places, takeaways etc which explains allergen information about the food they are serving or tells you that you can now ask for allergen information?

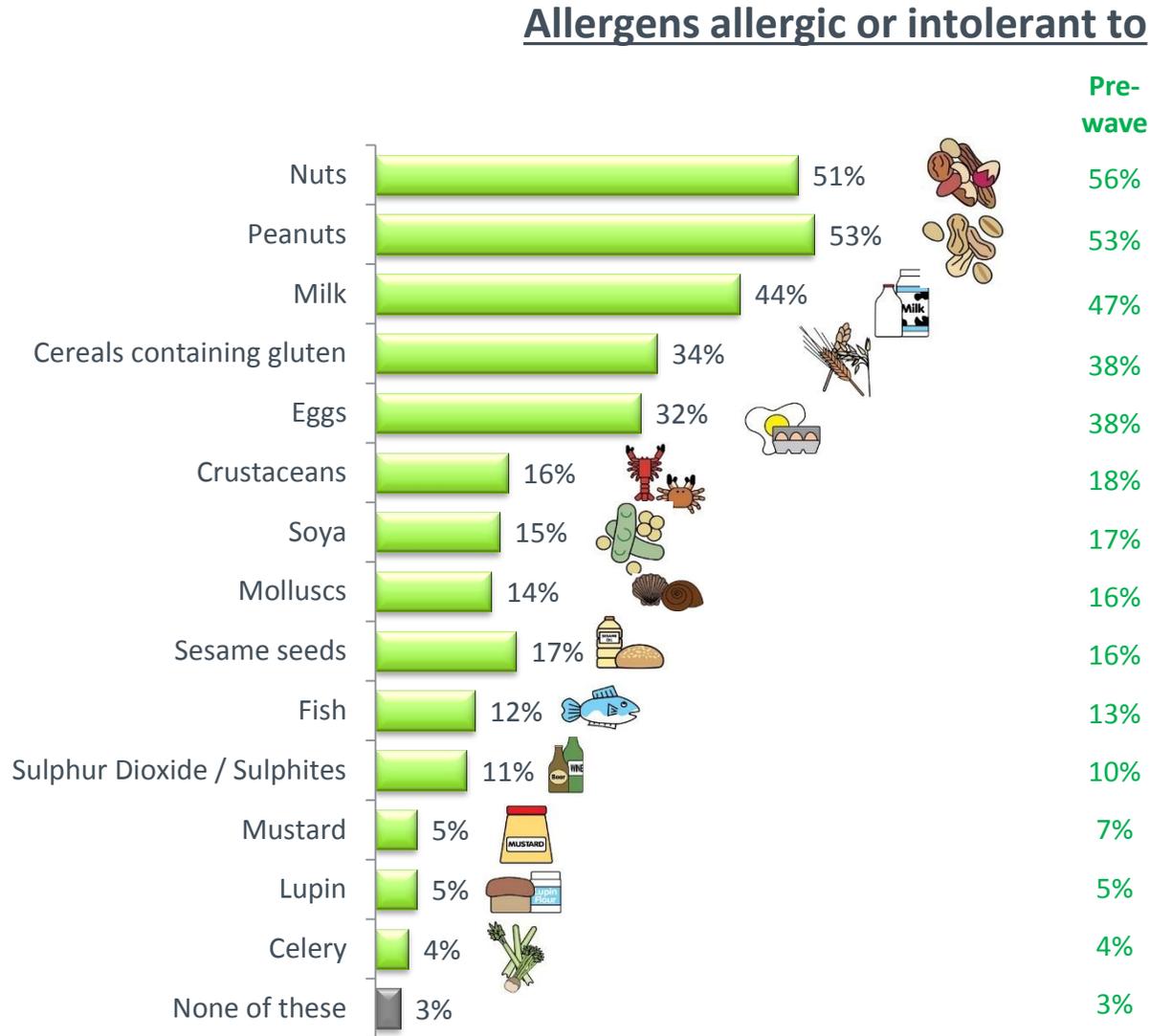
Base: All respondents – Allergy UK Survey (pre-wave 346, post-wave 391), Omnibus Panel (pre-wave 2099, post-wave 2086)

↑ ↓ Arrows indicate significant change from previous wave



Section 2: Questions asked only to Allergy UK Members

Nuts, peanuts and milk remain the most commonly cited ingredients Allergy UK members are allergic or have an intolerance towards



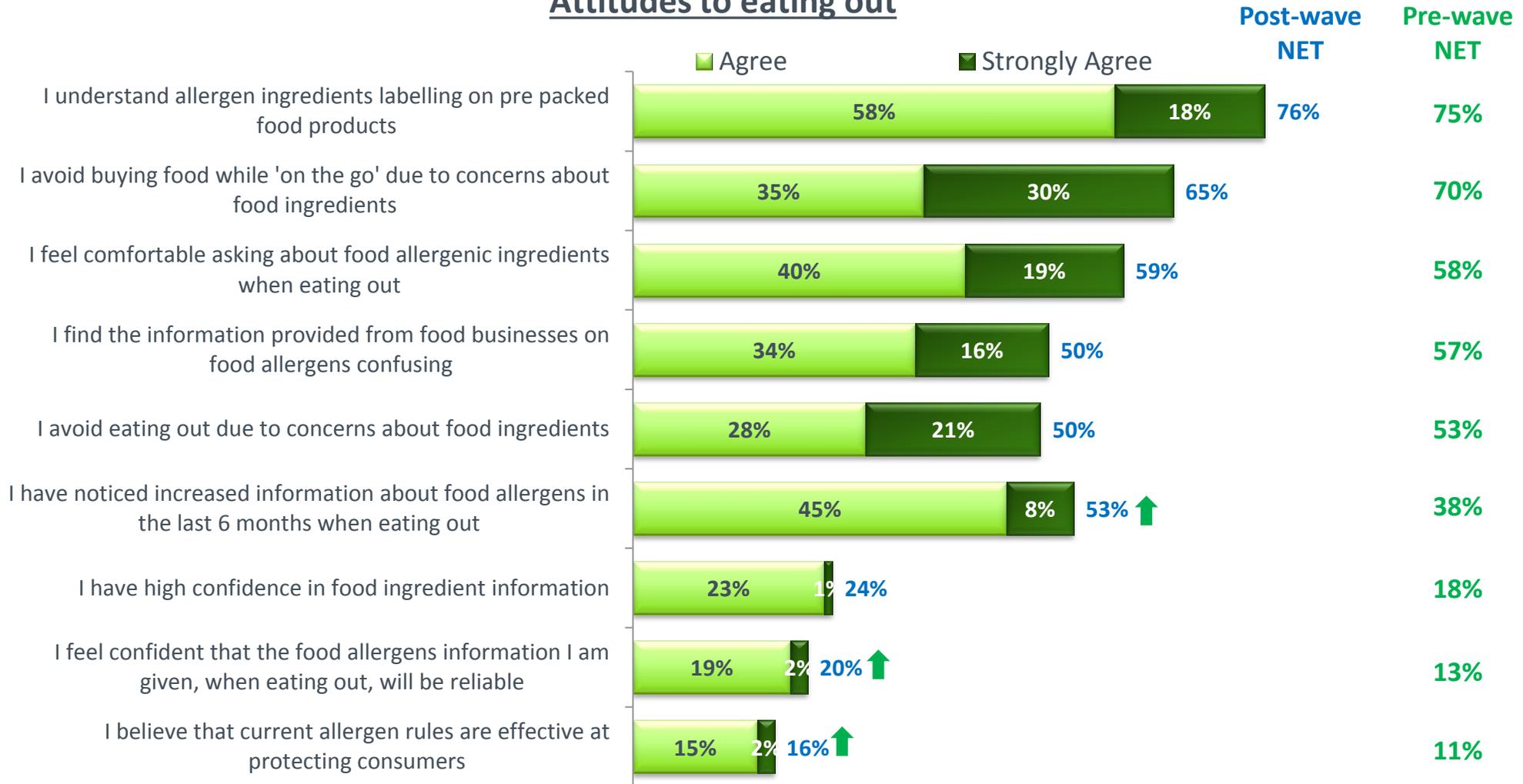
No significant differences wave on wave

(Q3) Which, if any, of the following allergens are you, or anyone that you regularly eat out with or buy food/drink for, allergic or intolerant to?
Base: All respondents – Allergy UK Survey (pre-wave 346, post-wave 391)

Since the introduction of the new regulations, 3 measures have significantly increased:

- Noticing information about allergens when eating out increased from 38% to 53%
- Confidence that allergen information is reliable increased from 13% to 20%
- Believing that allergen rules are effective at protecting consumers rose from 11% to 16%

Attitudes to eating out



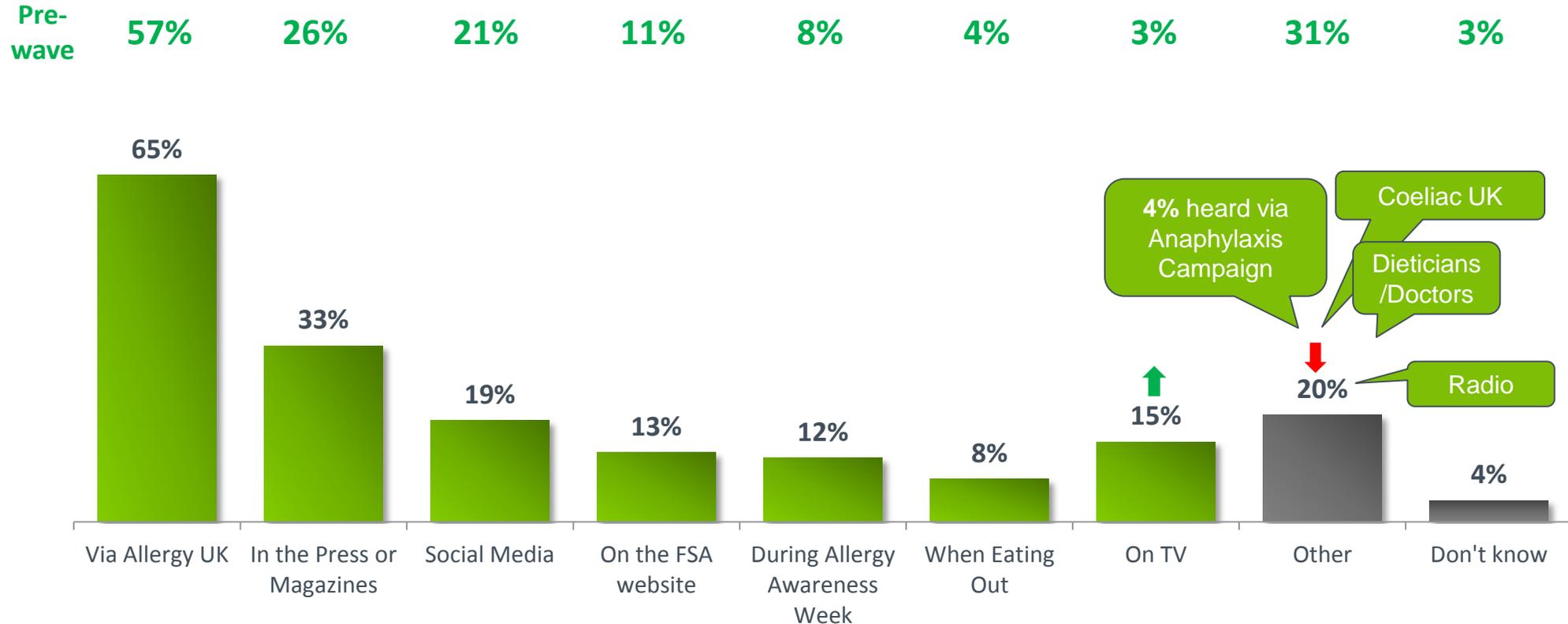
↑ ↓ Arrows indicate significant change from previous wave

(Q4) Please tell us to what extent do you agree or disagree with the following statements.
Base: All respondents – Allergy UK Survey (pre-wave 346, post-wave 391)

Allergy UK remains the leading source of consumer information about the new regulations. Increases can be seen across almost every information channel with 'On TV' seeing a significant rise.

The average number of sources mentioned has increased significantly from 1.6 to 1.9,

Where have you heard of the EU 'Food Information and Consumers Regulation'?

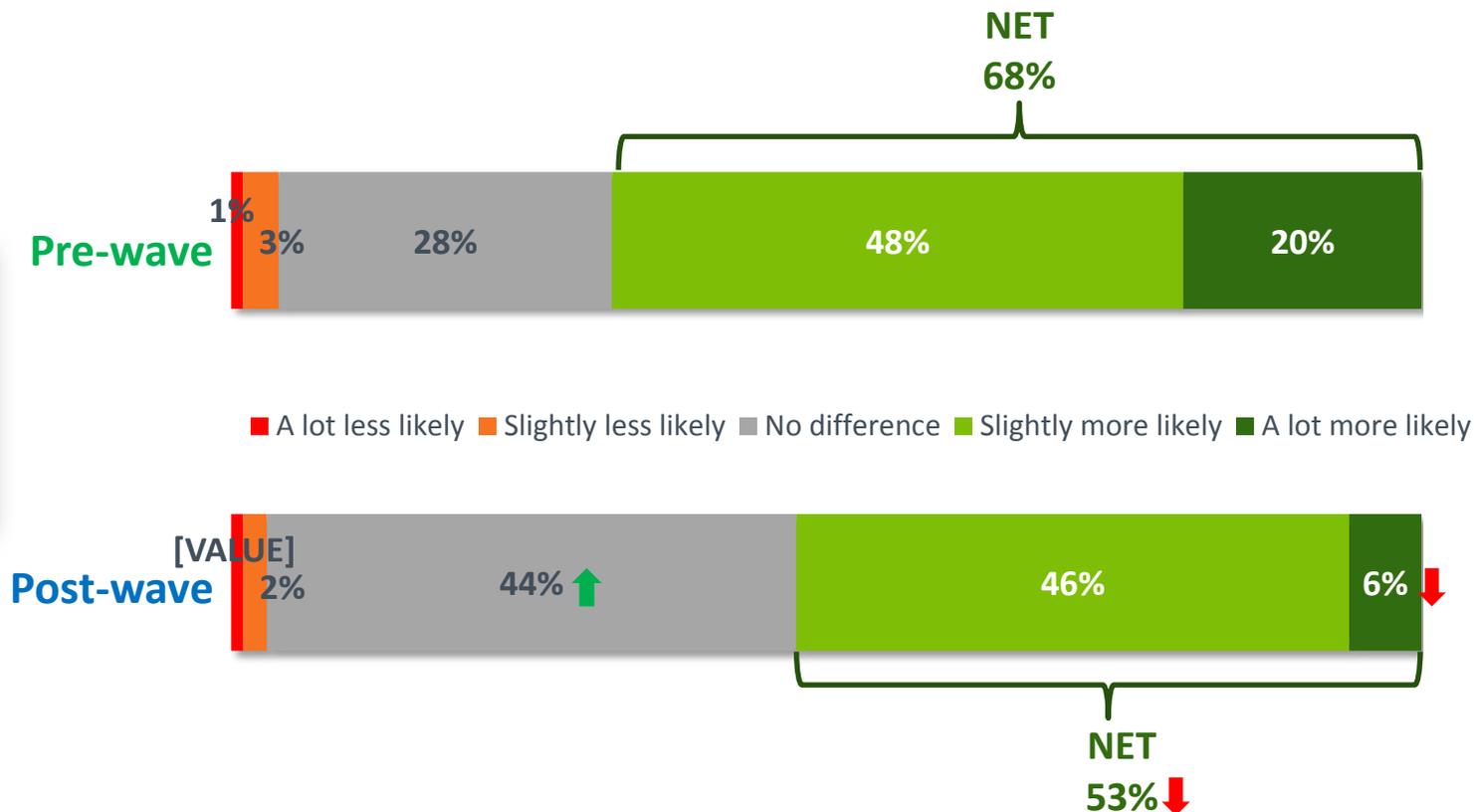
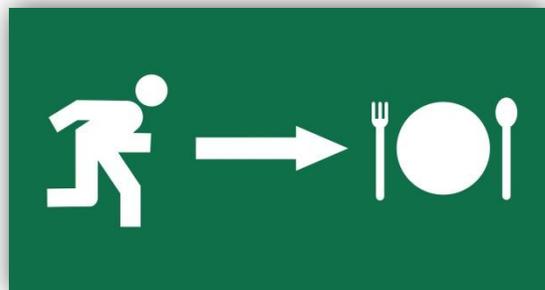


↑ ↓ Arrows indicate significant change from previous wave

(Q6) Where have you heard of the EU 'Food Information and Consumers Regulation' (EU FIC)?
 Base: All respondents saying yes at Q5 in the Allergy UK Survey – (pre-wave 162, post-wave 291)

Since FIC came into effect 53% claimed that the new regulations would make them more likely to eat out or order food from eating establishments

Effect of change in regulation on likelihood to eat out/order non-packaged food from eating establishments



(Q7) What impact do you think the change in regulation, in relation to making information more accessible on 14 specific allergens in non-packaged foods, will have on your likelihood to eat out / order non-packaged food from eating establishments?

N.B question wording changed slightly for post-wave: What impact does the change in regulation, in relation to making information more accessible on 14 specific allergens in non-packaged foods, have on your likelihood to eat out / order non-packaged food from eating establishments?

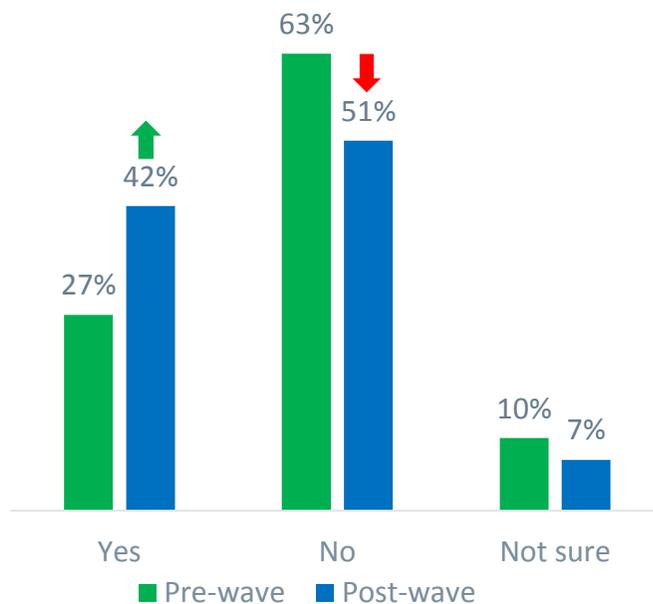
Base: All respondents –Allergy UK Survey (pre-wave 346, post-wave 391)

↑ ↓ Arrows indicate significant change from previous wave

There has been a significant increase in the proportion of Allergy UK members who have noticed signage or information about allergens in the food served



% who noticed signage or information on allergens

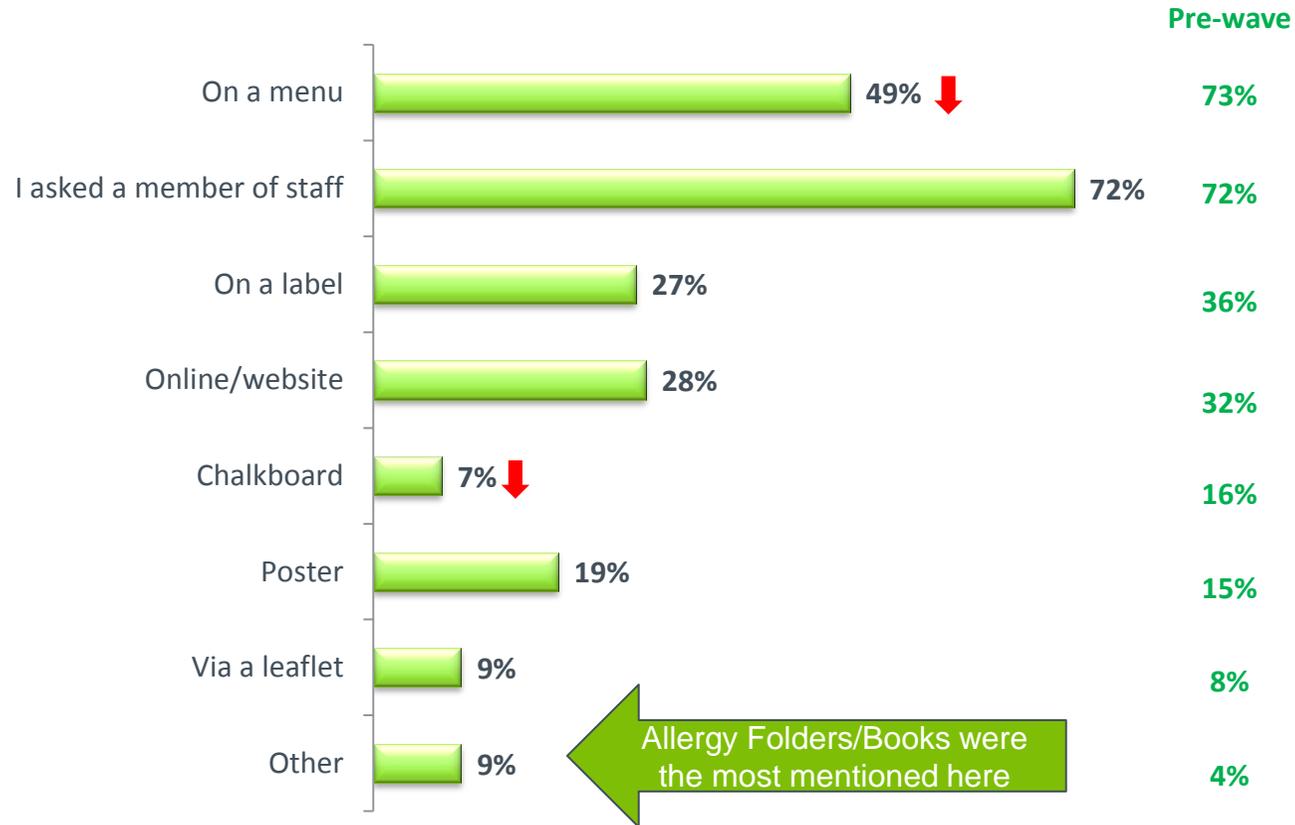


↑ ↓ Arrows indicate significant change from previous wave

(Q8) Have you noticed signage or information in the past six months in coffee shops, restaurants, cafes, sandwich places, takeaways etc which explains allergen information about the food they are serving or tells you that you can now ask for allergen information?
Base: All respondents – Allergy UK Survey (pre-wave 346, post-wave 391),

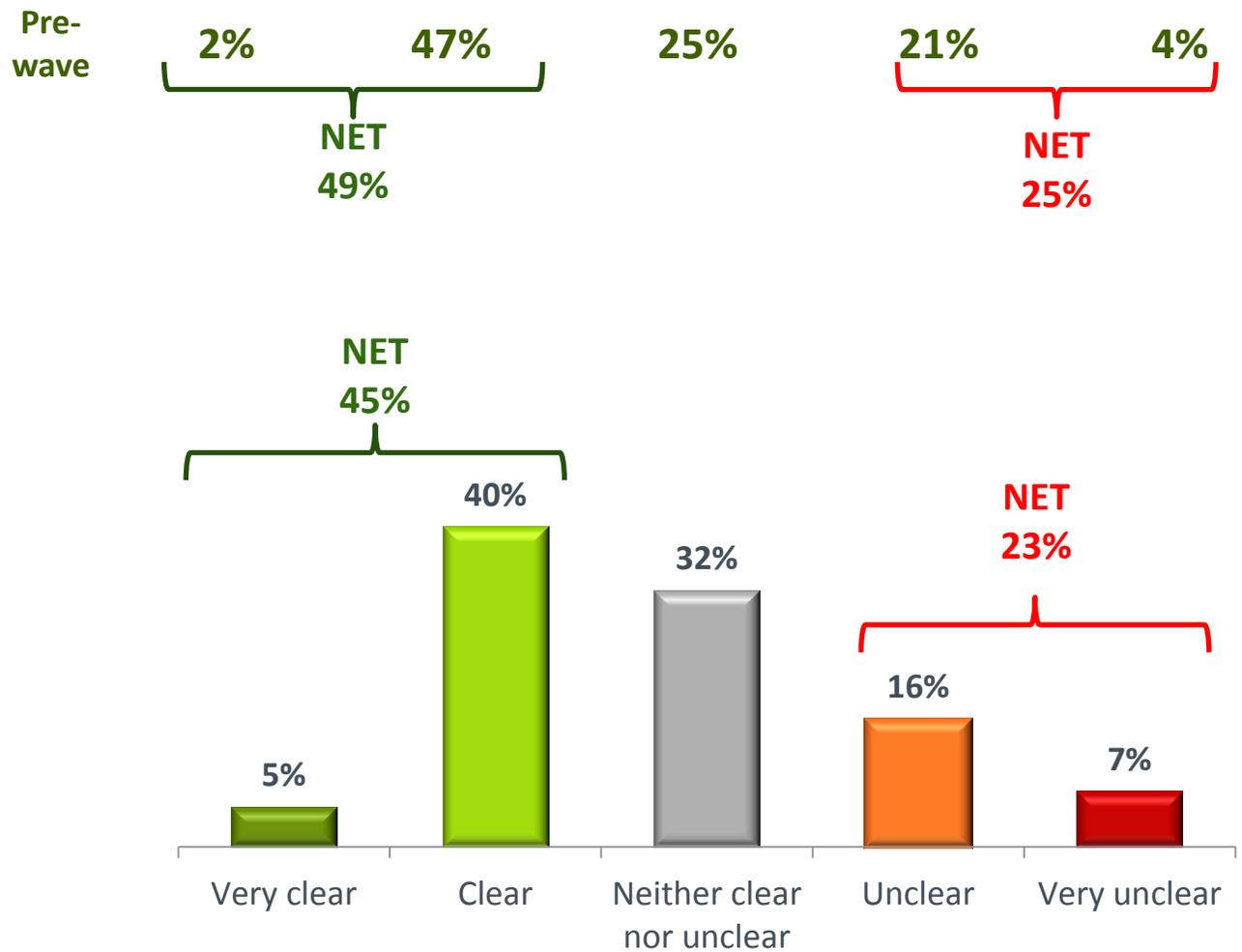
The most common way of accessing allergen information was by asking a member of staff

How allergen information was accessed by those who had noticed signage



Despite the new regulations, there has been no change in perceptions of how clear allergen information is when eating out

Clarity of allergen information when eating out

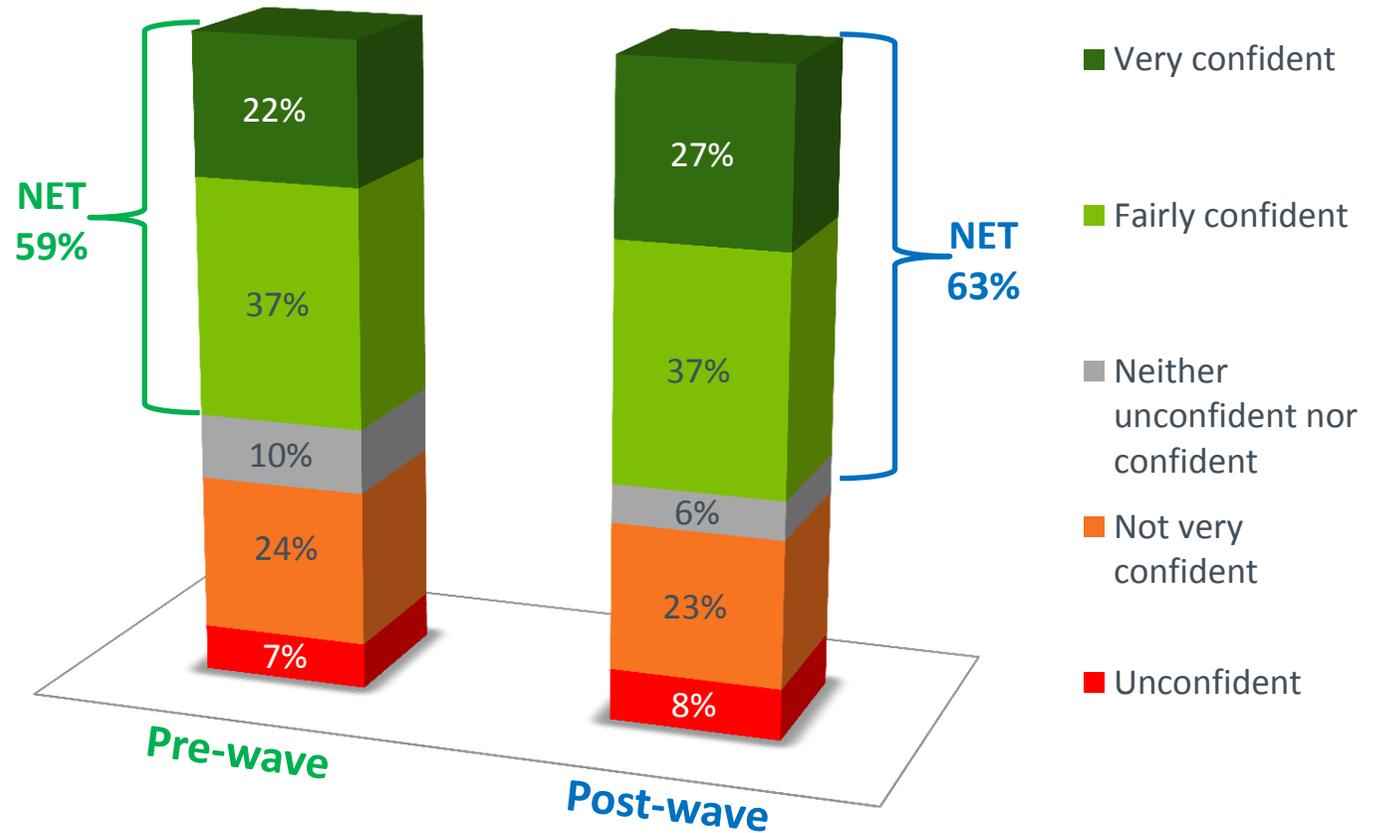


No significant differences wave on wave

(Q10) How clear was the information you have seen about allergens in food when eating out?
 Base: All respondents saying yes at Q8 –Allergy UK Survey (pre-wave 95, post-wave 165)

There has been a slight increase in levels of confidence when asking a member of staff for allergen information

Confidence in asking a member of staff in a food establishment for information about ingredients



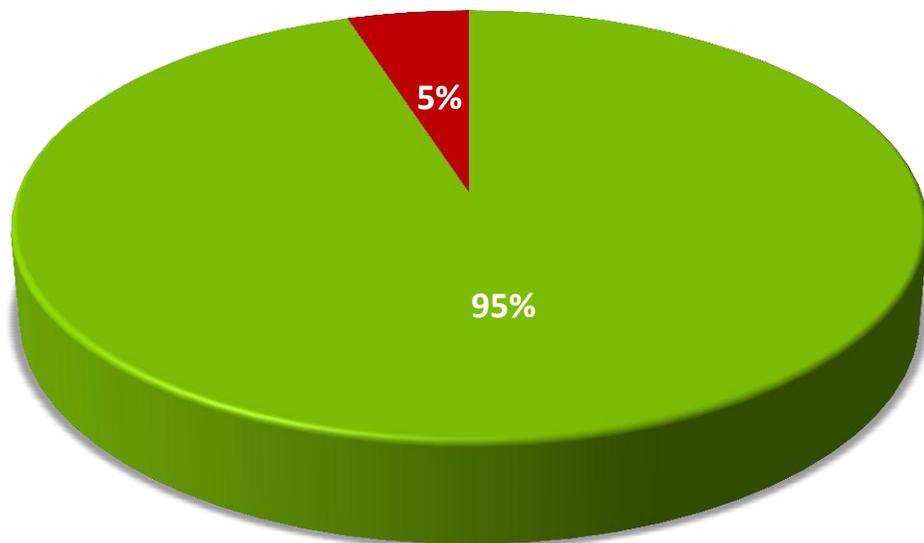
No significant differences wave on wave

(Q11) How confident would you feel in asking a member of staff in a food establishment for information about ingredients of any foods they are selling, because of a concern about possible allergens / food intolerance?

Base: All respondents – Allergy UK Survey (pre-wave 346, post-wave 391)

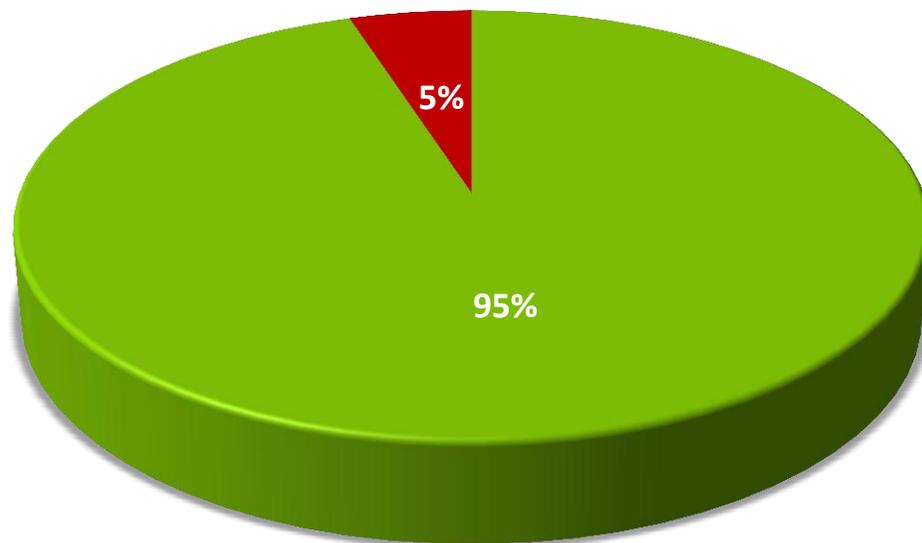
The proportion who have asked a member of staff for allergen information has remained steady at 95%

Have you asked a member of staff in a food establishment for information about ingredients in any foods they are selling?



■ Yes ■ No

Pre-wave



■ Yes ■ No

Post-wave

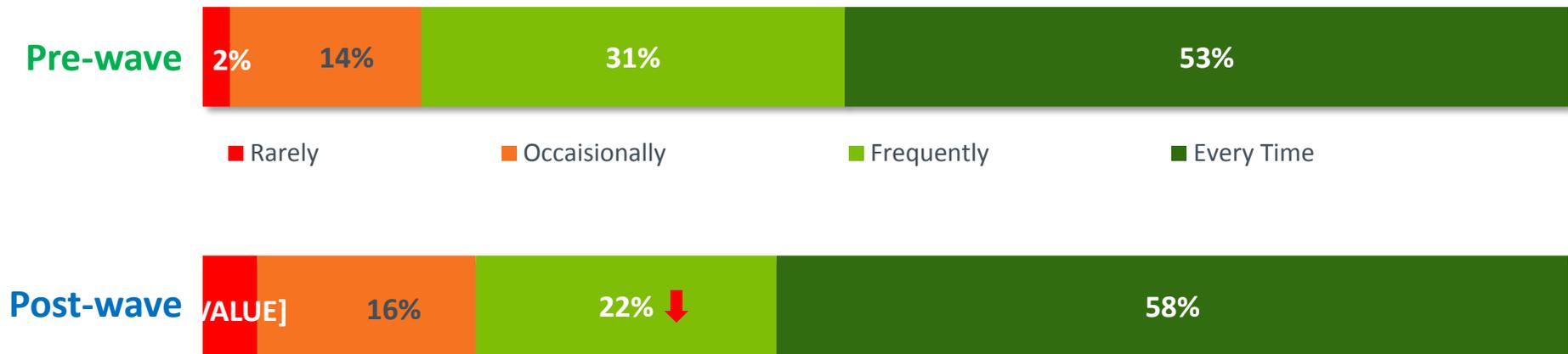
No significant differences wave on wave

(Q12) Have you ever asked a member of staff in a food establishment for information about the ingredients in any foods they are selling, because of a concern about possible food allergies/intolerance?

Base: All respondents - Allergy UK Survey (pre-wave 346, post-wave 391)

80% of Allergy UK members frequently or always ask staff for information on food ingredients and this remains stable pre and post the new regulations

Frequency of asking a member of staff in a food establishment for information about ingredients in any foods they are selling



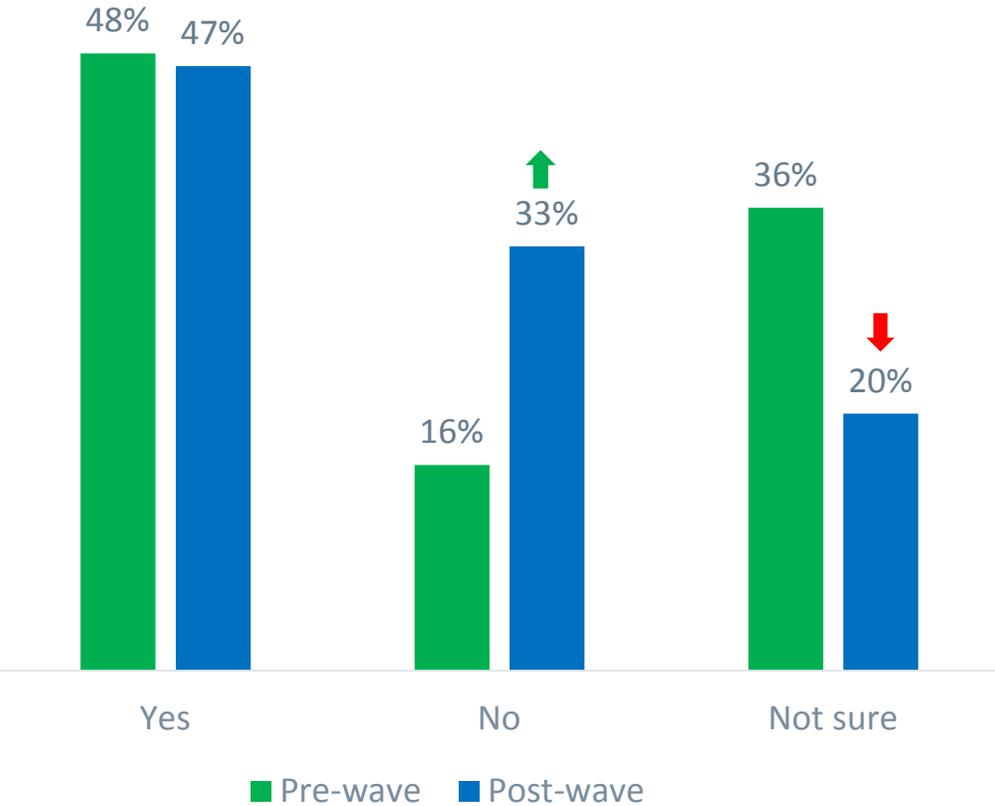
(Q12b) How many times in the past six months have you asked a member of staff in a food establishment for information about the ingredients in any foods they are selling, because of a concern about possible food allergies / intolerances?

Base: All respondents saying yes at Q12 - Allergy UK Survey (pre-wave 329, post-wave 371)

↑ ↓ Arrows indicate significant change from previous wave

Since the new regulations came into effect a stable proportion (47%) feel more confident in asking staff for ingredient information. What we also see however is a significant increase in those who do not feel more confident about asking staff for information. Could this be based on unsatisfactory experiences?

Will the EU FIC regulation make you feel more confident in future in asking a member of staff in a food establishment about ingredients of foods they are selling?

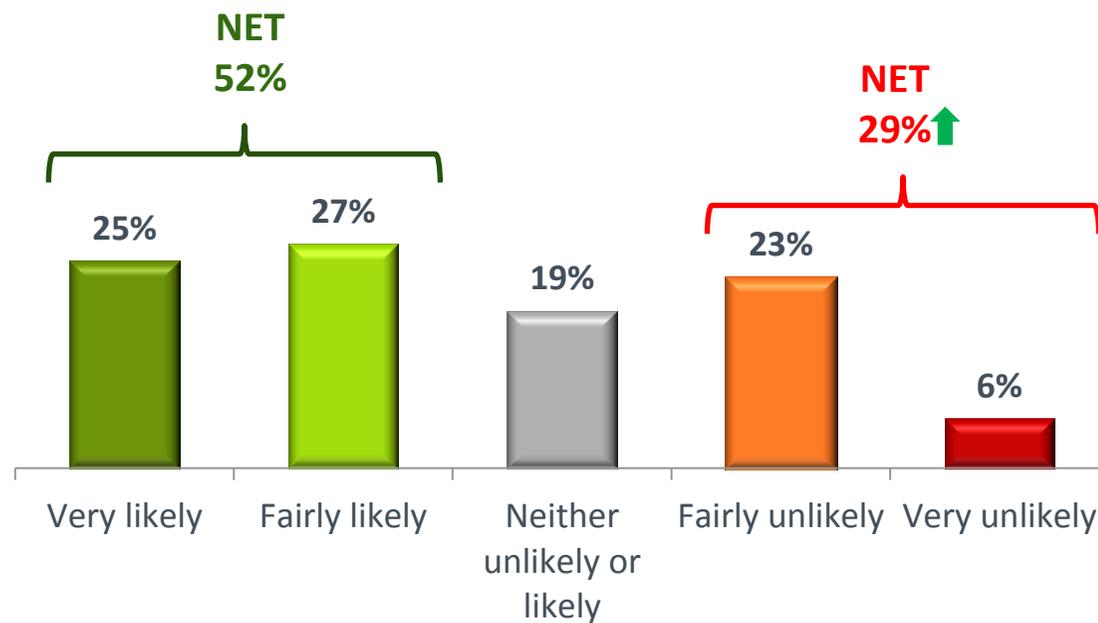


↑ ↓ Arrows indicate significant change from previous wave

(Q13) Will the EU FIC regulation make you feel more confident in future in asking a member of staff in a food establishment for information about ingredients of any foods they are selling, because of a concern about possible allergens/food intolerance?
Base: All respondents - Allergy UK Survey (pre-wave 346, post-wave 391)

52% would report a food establishment for not following the regulations. However there has been a 7pt increase in those unlikely to report which is concerning

Likelihood to report food establishment for not following regulation correctly

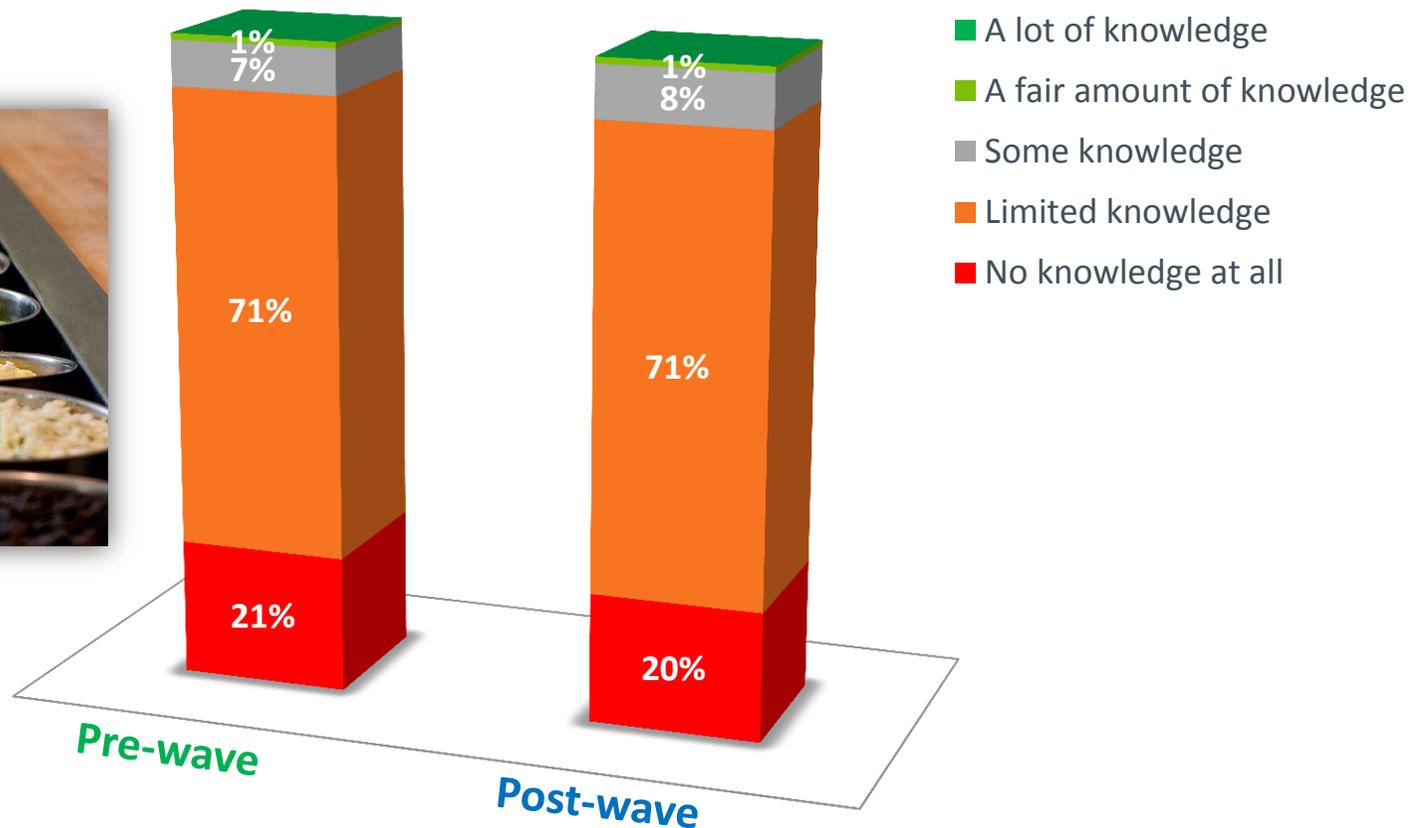


↑ ↓ Arrows indicate significant change from previous wave

(Q14) How likely would it be for you to report a food establishments which you consider is not following this regulation correctly?
 Base: All respondents – Allergy UK Survey (pre-wave 346, post-wave 391)

Allergy UK members continue to believe that the general public have limited knowledge about food allergies and intolerances

Perceived knowledge of the general public on ingredients related to food allergies / intolerances



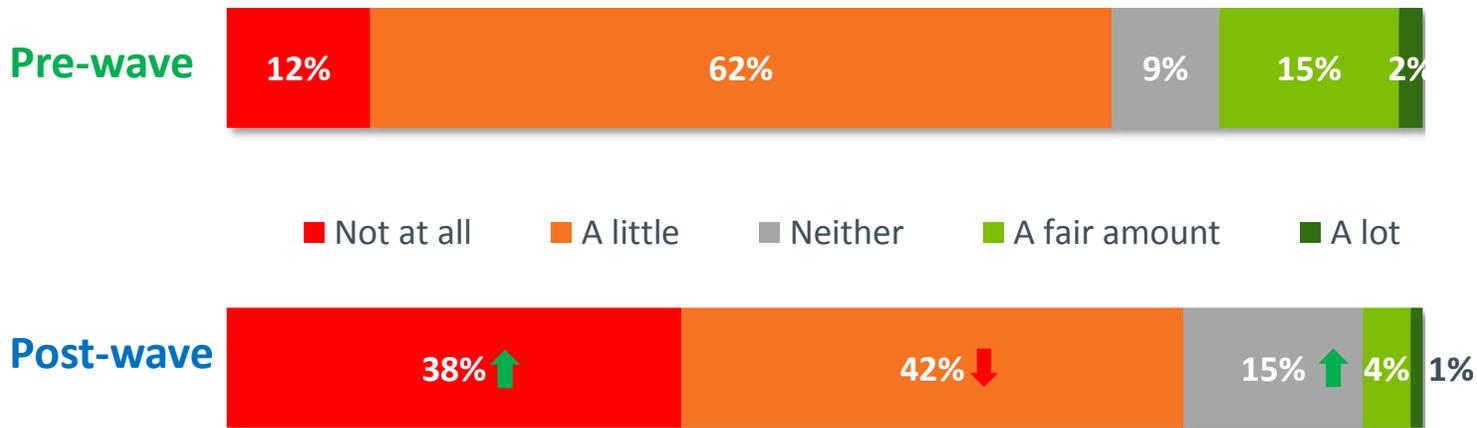
No significant differences wave on wave

(Q15) How much knowledge do you feel people in the general public, who do not have a food allergy or intolerance, have about the ingredients related to food allergies/food intolerances?

Base: All respondents – Allergy UK Survey (pre-wave 346, post-wave 391)

80% of Allergy UK members believe the EU FIC regulation has had zero or little impact on the general public's understanding of allergies and intolerances

Perceived effect of EU FIC on knowledge of general public about food allergies / intolerances



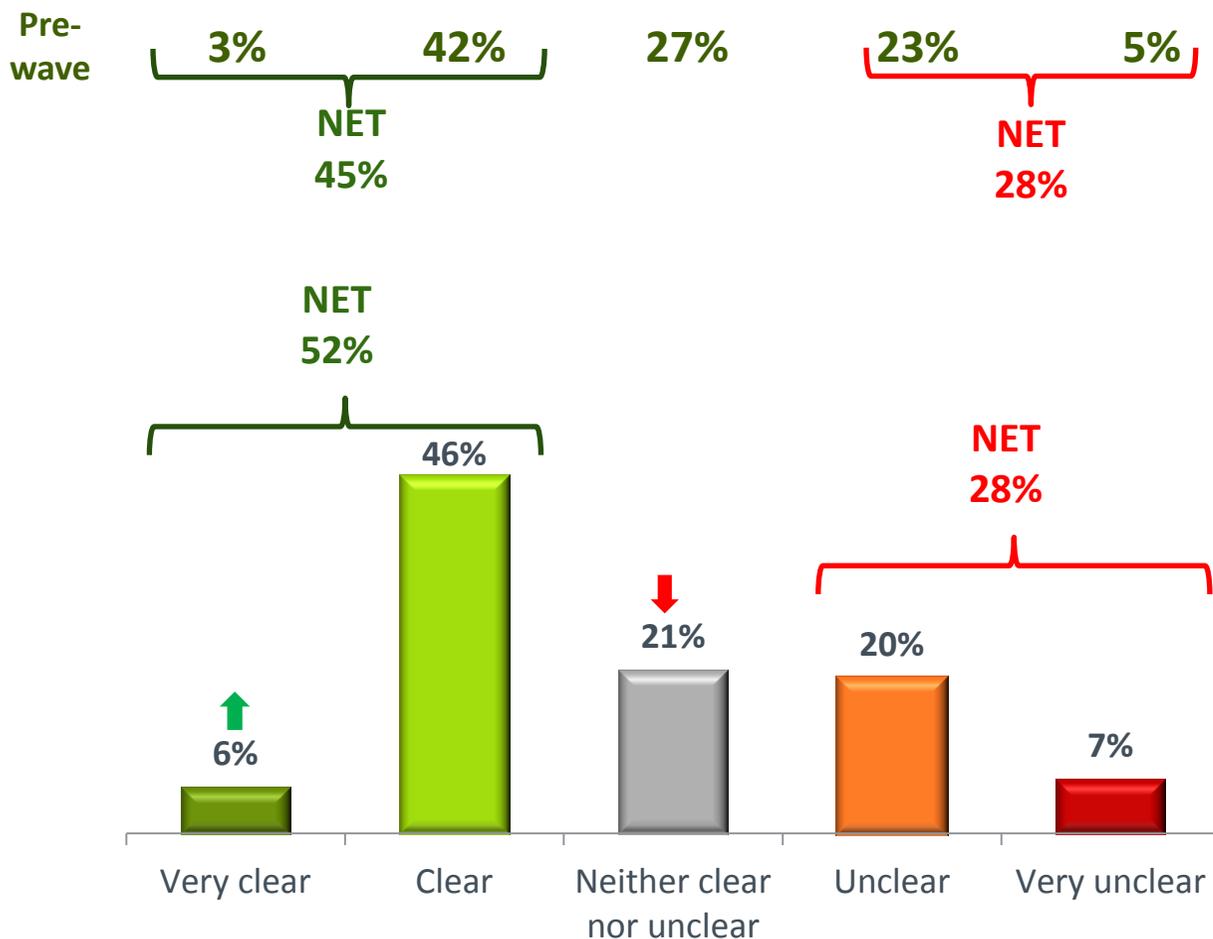
(Q16) Do you feel that the EU FIC regulations (which requires Food Business Operators to provide information to consumers on the presence of 14 allergens, when used as deliberate ingredients, in foods that they provide or sell) has increased the knowledge of the general public about food allergies / food intolerances?

Base: All respondents - Allergy UK Survey (pre-wave 346, post-wave 391)

↑ ↓ Arrows indicate significant change from previous wave

52% consider the labelling on pre-packaged food to be clear and this remains stable over the two waves

Clarity of current allergen labelling on pre-packaged food



INGREDIENTS: WATER, CALCIUM AND SODIUM CASEINATE, MILK PROTEIN ISOLATE, BLEND OF VEGETABLE OILS (SUNFLOWER AND CANOLA OIL), COCOA POWDER, MALTODEXTRIN, FRUCTOSE, NATURAL AND ARTIFICIAL FLAVOR, POTASSIUM CITRATE, WHEY, CELLULOSE GUM, VITAMIN MINERAL BLEND, SOY LECITHIN, MEDIUM CHAIN TRIGLYCERIDES, SODIUM HEXAMETAPHOSPHATE, MONOSODIUM PHOSPHATE, POTASSIUM CHLORIDE, ACESULFAME POTASSIUM, SALT, CARRAGEENAN, SUCRALOSE.

VITAMIN MINERAL BLEND: VITAMIN A PALMITATE, CHOLECALCIFEROL, VITAMIN E ACETATE, BIOTIN, NIACINAMIDE, D-CALCIUM PANTOTHENATE, THIAMINE MONONITRATE, CYANOCOBALAMIN, RIBOFLAVIN, PYRIDOXINE HYDROCHLORIDE, FOLIC ACID, ASCORBIC ACID, TRICALCIUM PHOSPHATE, CHROMIUM CHLORIDE, COPPER GLUCONATE, POTASSIUM IODIDE, FERRIC PYROPHOSPHATE, MAGNESIUM PHOSPHATE, ZINC OXIDE.

ALLERGEN STATEMENT: THIS PRODUCT CONTAINS INGREDIENTS DERIVED FROM MILK AND SOY. GLUTEN FREE.

↑ ↓ Arrows indicate significant change from previous wave

(Q17) Thinking now about pre-packaged food e.g. biscuits/snack foods and ready meals, how clear do you think the current allergen ingredients' labelling is?

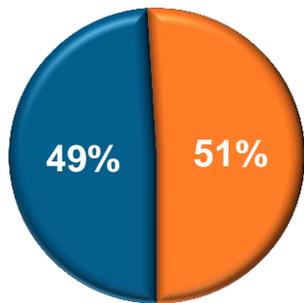
Base: All respondents – Allergy UK Survey (pre-wave 346, post-wave 391)



Appendix – respondent profiles from wave 1

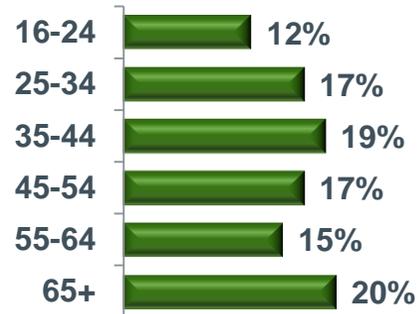
Omnibus Audience: pre-wave audience

Gender



■ Men
■ Women

Age



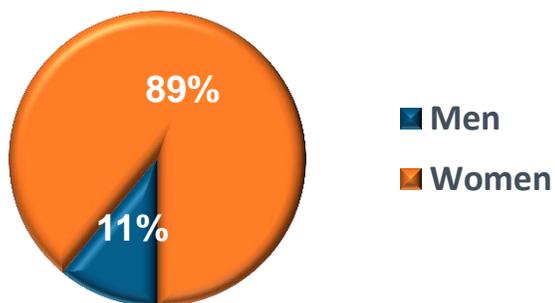
Region



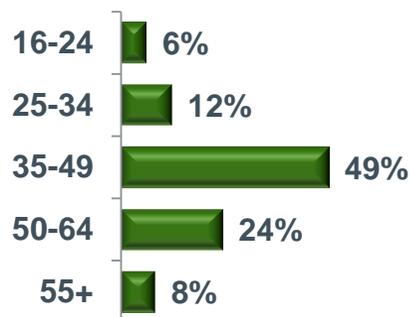
Allergy UK database: pre-wave audience

- Allergy UK sent out 2 emails (an initial mail-out and one reminder) to 6,257 members of its database inviting them to undertake the survey hosted by Harris.
- From the 2 emails, 346 responses were achieved, a response rate of 5.5%

Gender



Age



Region



AHEAD OF WHAT'S NEXT.

For any questions please contact

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