

# FSS Consumer Tracking Survey

Wave 1 - December 2015

Presentation of results to FSS  
9 March 2016



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# 1

## About the research



# FSS Consumer Tracking is one of six 2015/16 insights projects and is relevant to five of six strategic outcomes

<i>Six FSS strategic outcomes</i>	Food is safe	Consumers choose healthier diets	Food is authentic	Responsible food businesses flourish	FSS is trusted	FSS is efficient, effective
<i>Six 15/16 insights projects</i>	<b>(1) Strategic plan customer forums</b> in January to listen to customer feedback on out strategy					
						<b>(2) FSS people survey</b> in Feb to understand their FSS engagement
	<b>(3) FSS Consumer tracking</b> with 1,000 adults in Scotland in December 2015 to understand their attitudes/behaviours/knowledge now; and to use this to set/measure progress against our goals					
	<b>(4) Teachers Panels</b> in March with teachers to understand what safe/healthy tools work, any gaps					
				<b>(5) FHIS research</b> Consumer groups in March to understand food hygiene schemes views		
	<b>(6) FSS Segmentation</b> A review of all relevant research sources to build model, in March, of what drives consumers attitudes /behaviours /knowledge; and to use this to tailor marketing/communications to key segments of the Scottish population					

# Background to the survey



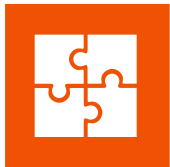
Food Standards Scotland took the decision to conduct a bespoke consumer survey for Scotland, as a more cost-effective and relevant solution than continuing to co-fund Food & You and the FSA Biannual Consumer Attitudes Survey.



TNS was commissioned to conduct this research, and worked with a steering group to review existing questionnaires and mould the new survey to meet to FSS's needs, with representation from across all FSS areas.



Another key driver was to make the new survey 'shorter and smarter' to increase confidence in the validity and reliability of the results.



The new tracking survey will take place twice a year, with two alternating modules – the focus of this wave is on the food safety module and the healthy eating module will be included in the next wave.

# How we conducted the research



A sample of 1,003 adults aged 16+ surveyed across Scotland between 8<sup>th</sup> and 15<sup>th</sup> December 2015.



Survey questionnaires were completed online, with survey sample sourced from TNS' online panel.



Quotas were set on gender, age and social grade to ensure a representative sample was interviewed, with weighting applied at the analysis stage to correct any over- or under-representation.



There was a lot of positive feedback on the survey – that it was enjoyable and easy to answer.



Survey provides a wealth of information for further analysis by a number of variables (inc. demographics) **but the focus of this presentation is on the total Scotland sample.**

Full details of base sizes and further details on sample available in Appendix.



FSS Consumer Tracking Survey

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# Despite being long, there was a lot of positive feedback on the survey

**45%** Said the survey was 'very enjoyable'

**91%** Said it was easy to answer the questions in the survey

Very interesting survey! Thank you!

Glad to be involved with such an important study

Nice survey and made you think about how you buy, store and keep food

A worthwhile survey for once where I can see the value of answering the questions

Really interesting survey to take part in, thank you

Most interesting survey I have taken part in for a long time

This was one of the most relevant surveys in which I have participated and as a result I felt it would possibly be of more significance than some others I have completed.

It would be interesting to have answers after some of the questions so people can see whether they are doing the right thing or not

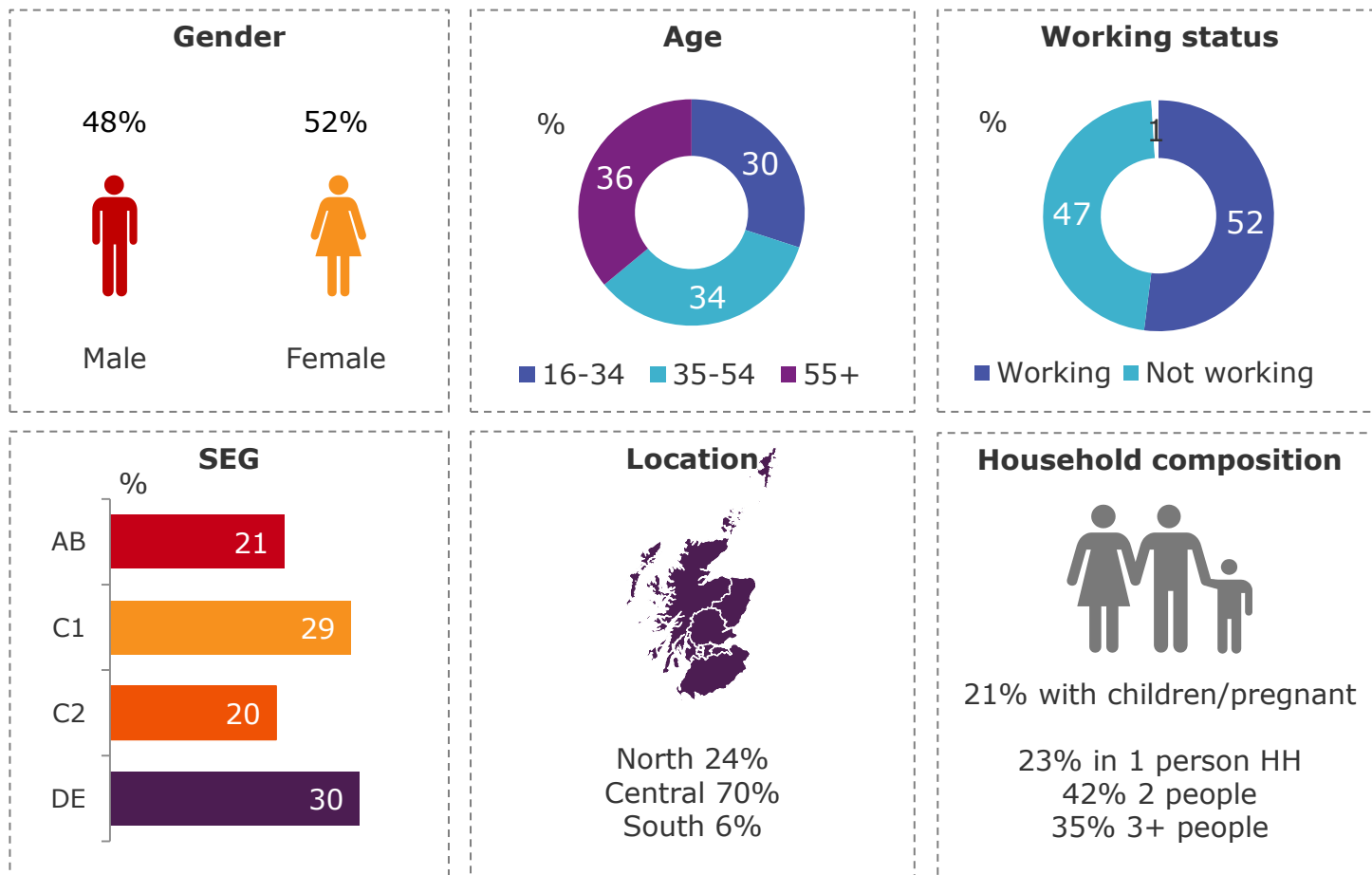
# 2

## Who we spoke to





# Who we spoke to – a representative sample of Scotland



# Survey provides a wealth of information for further analysis by a number of variables (inc. demographics):



59%

Responsible for **all or most** cooking / preparing food at home (Q17)



62%

Responsible for **all or most** household shopping (Q65)



27%

Ever had food poisoning (4% in the last year) (Q36)



11%

Have / live with someone with an allergy (Q57/Q58)



24%

Health condition or lowered immunity (Q70)



61%

Following a specific type of diet (Q57)



Frequency of preparing/cooking different foods at home (Q18)

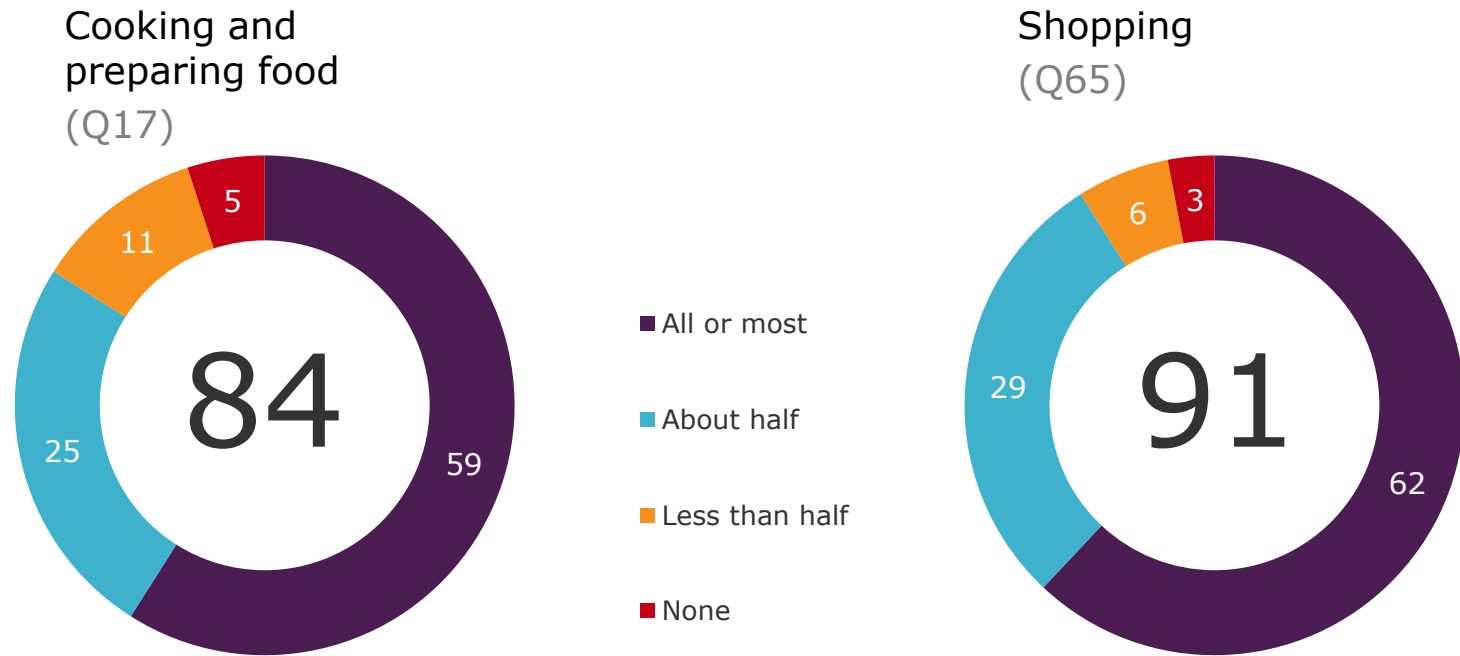


Location and frequency of food shopping (Q67/Q68)

This presentation is focussed on total Scotland sample

# Vast majority of sample responsible for half of more of shopping, preparing and cooking food in their household

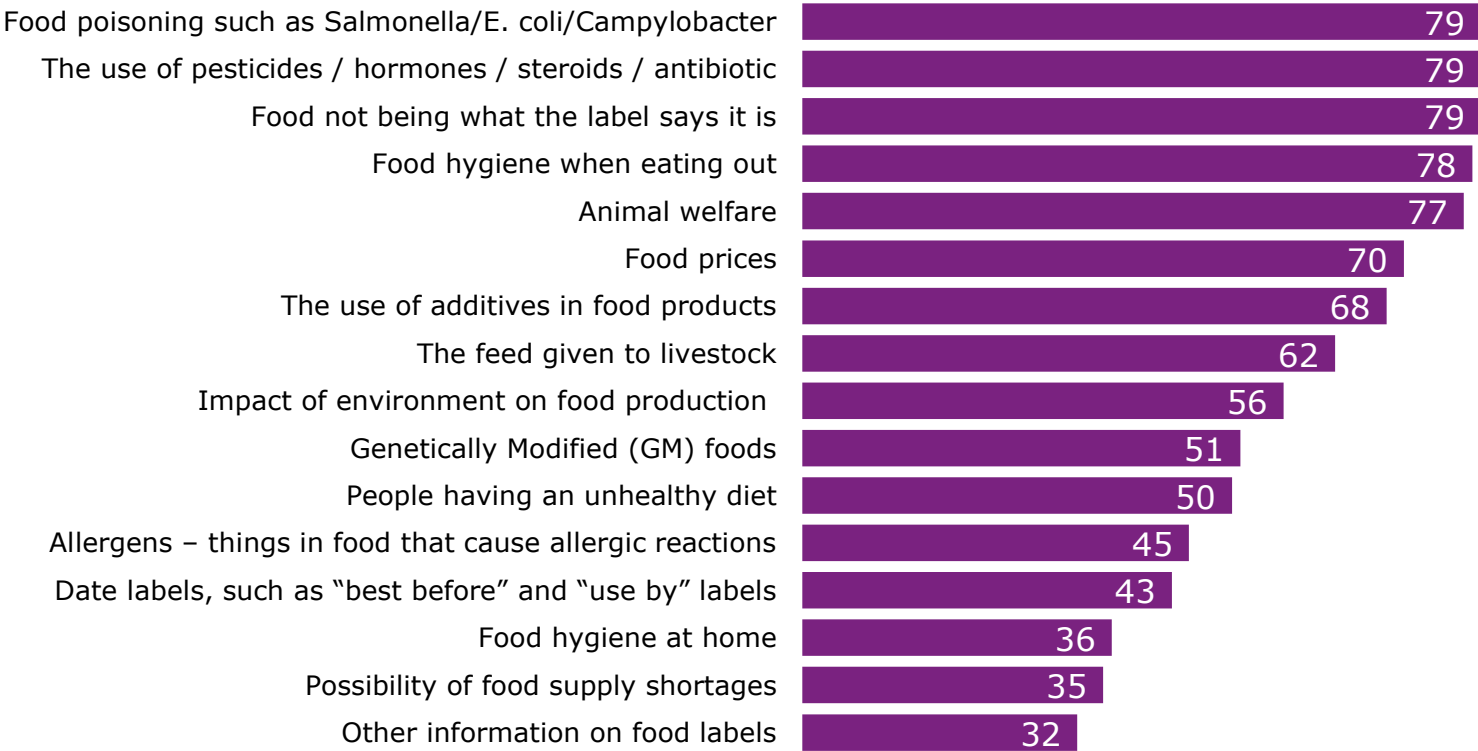
Level of responsibility for:



# Consumers are concerned with a wide variety of issues, from hygiene to production and authenticity

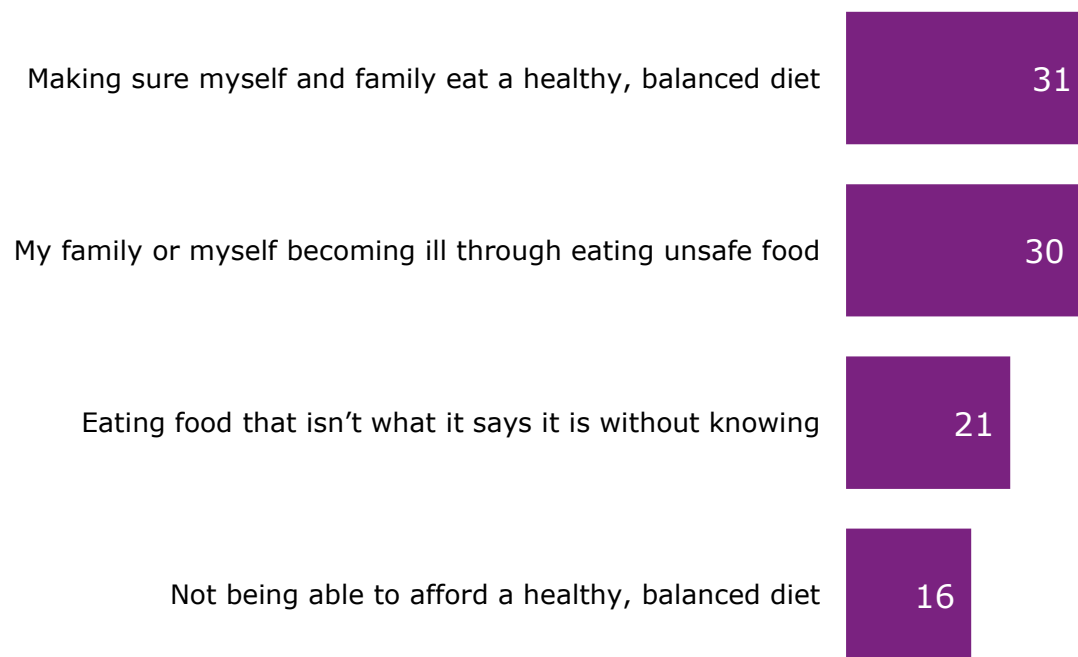
## % concerned by each issue (prompted)

(Q13 - All respondents)



# When prompted, most concern expressed about personal / family diet and safety

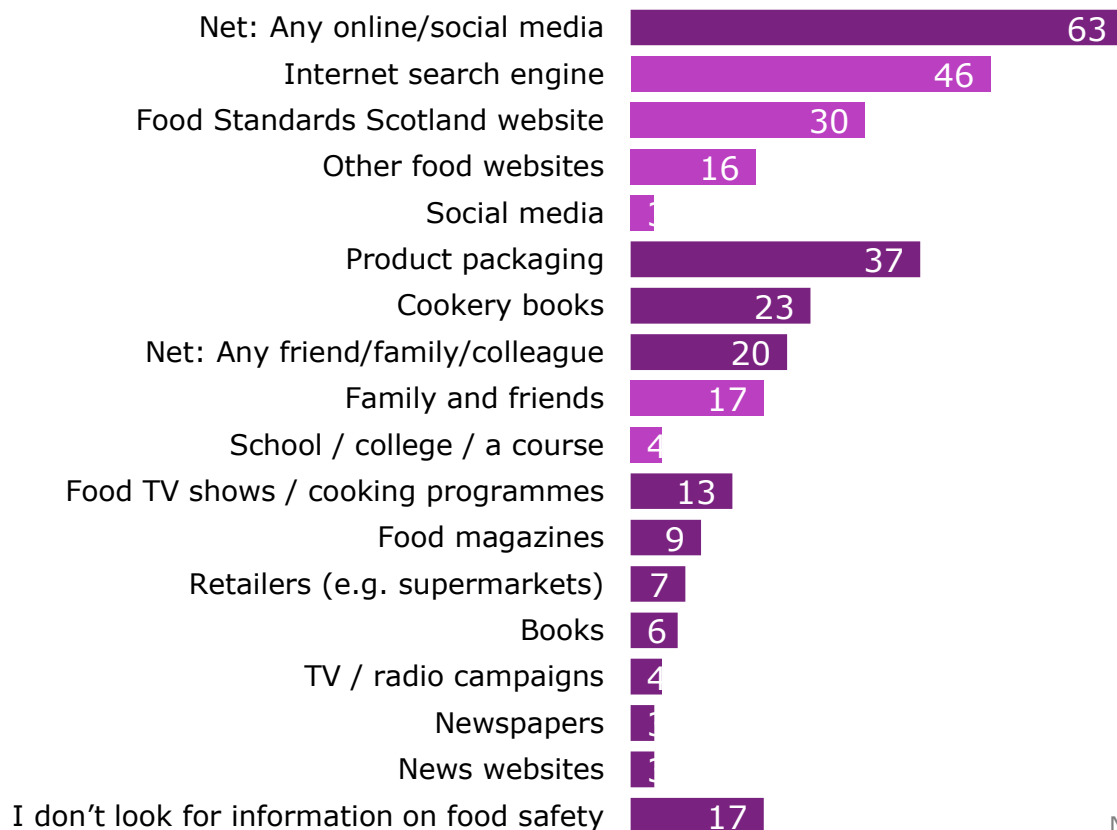
% **most** concerned by each issue (prompted)  
(Q14)



# Internet searches and product packaging are the most commonly used sources of information on food safety

Sources of information about food hygiene, preparation and cooking (prompted)

(Q42)



NB: Only mentions of 3%+ shown

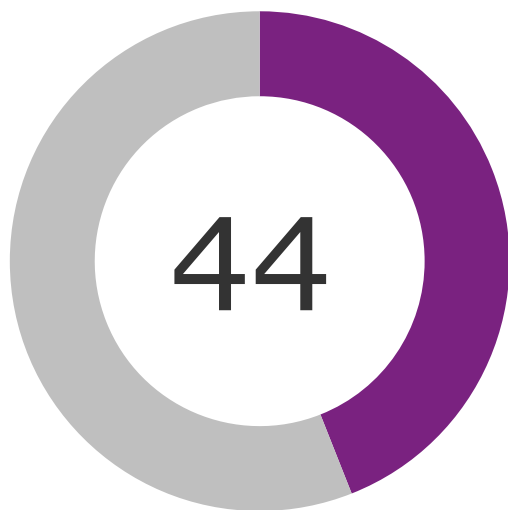
# 3

Food Standards Scotland is trusted

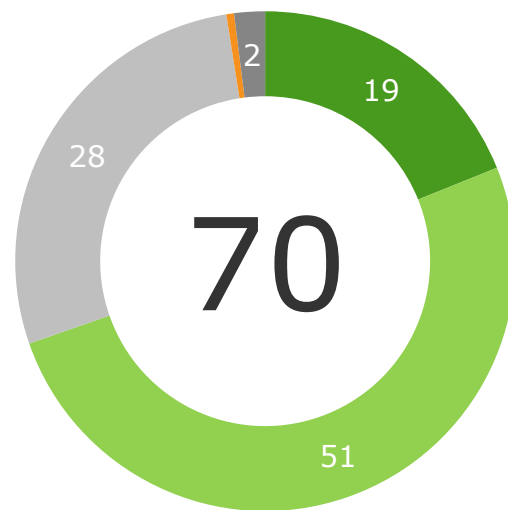


# FSS has achieved a good level of brand recognition and a widespread degree of trust – a good base to build on after only eight months

Had you heard of Food Standards Scotland before today?\* - % Yes  
(Q7)



How much do you trust or distrust Food Standards Scotland to do its job? - % trust  
(Q9 – Among those aware of FSS – 450 respondents)



- Trust it a lot
- Trust it
- Neither
- Distrust it
- Distrust it a lot
- Don't know

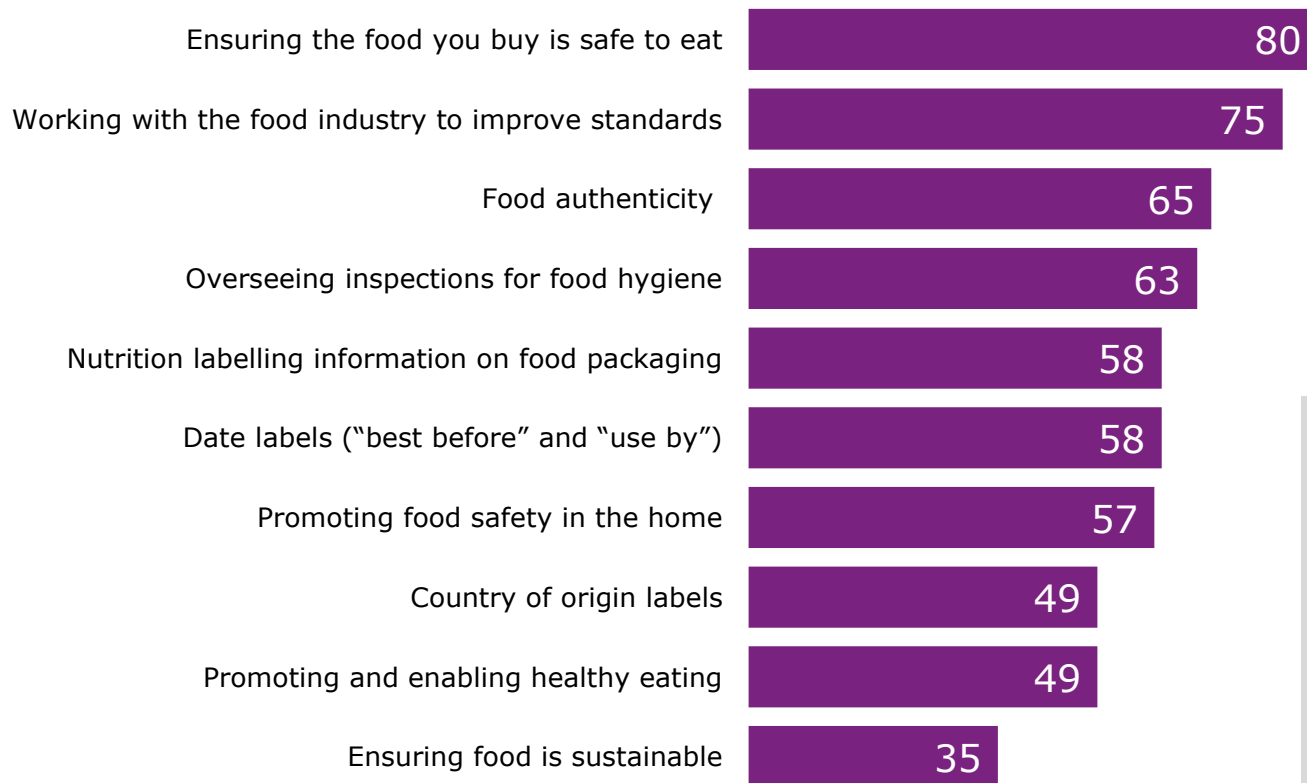
\* Respondents were told: In Scotland, 'Food Standards Scotland' has replaced 'Food Standards Agency' as the organisation responsible for making sure people eat healthily and safely



# Knowledge of FSS is fairly limited and driven by the brand name: emphasis on safety and standards rather than healthy eating

Which of these issues do you think Food Standards Scotland is responsible for?

(Q8 – among those aware of FSS - 450 respondents)

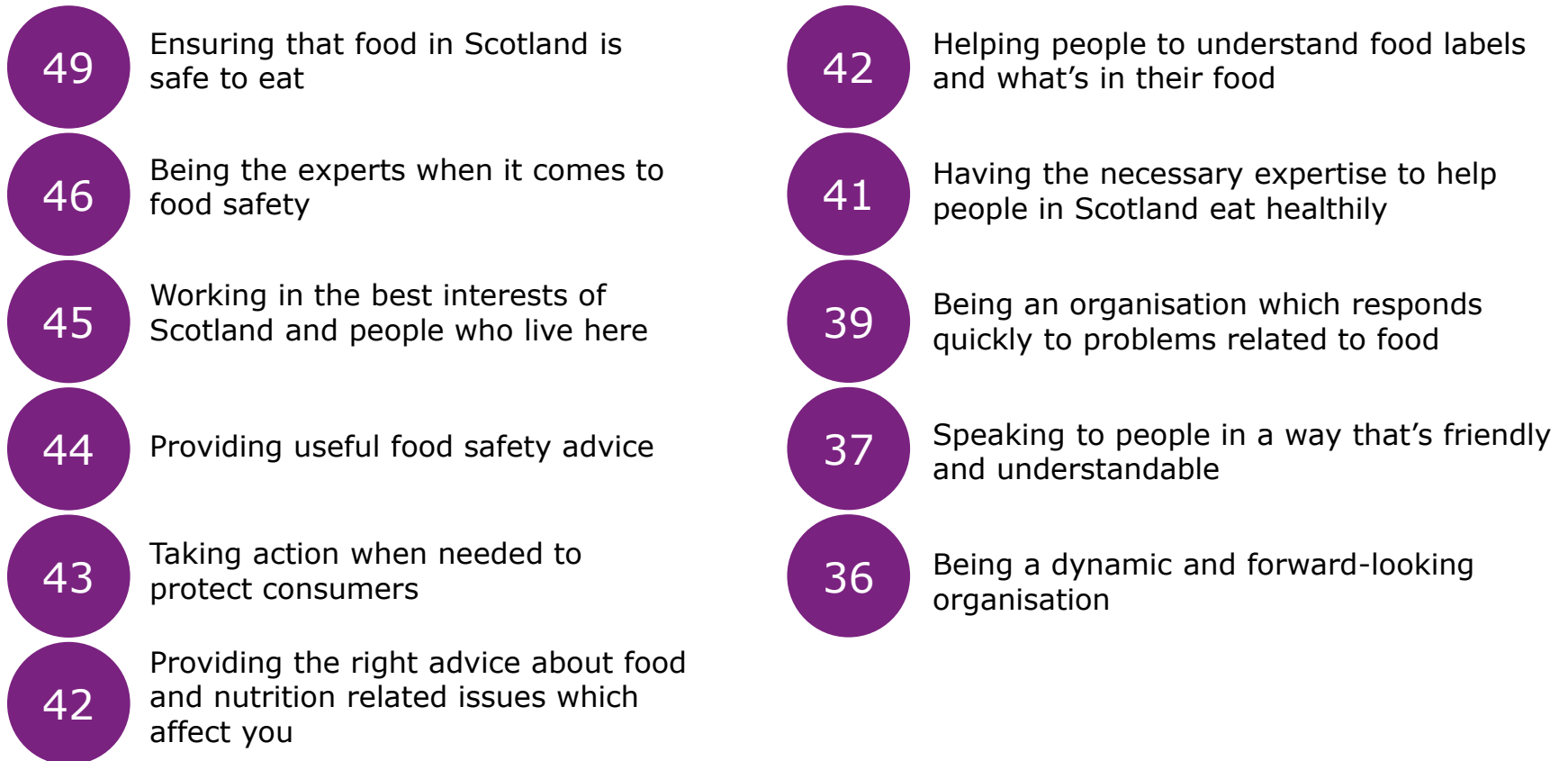


Strategic Plan Customer Forums also highlighted that the FSS name and branding firmly plant the organisation into safety in the minds of consumers but healthy eating is a less obvious fit

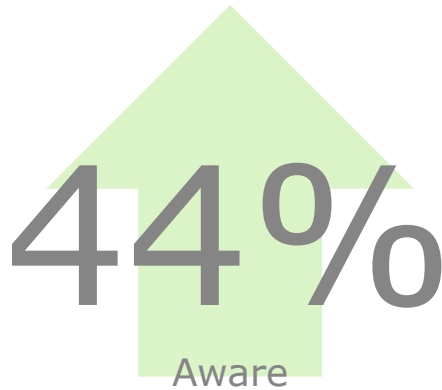
# FSS performing best where consumers expect it; positive perceptions will strengthen further with familiarity

How do you rate FSS in terms of...? % Excellent or Very good

(Q10 – among those aware of FSS - 450 respondents)

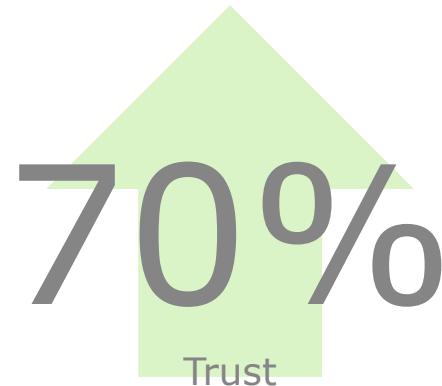


# Focus on: Building brand recognition and trust



Consistent and visible communications required, articulating relevance and involvement in consumers everyday lives

Being known beyond food *standards* – e.g. on healthy eating - will also help FSS to improve both recognition and trust



Play a key role as a voice of authority:

- Help reduce confusion on key health messages
- React effectively to issues in the food industry

# FSS is trusted

1

Opportunities to improve on the solid base of trust already established (among those familiar with FSS) and to be regarded as an effective organisation will depend upon actions in times of crisis. However increasing brand awareness and broadening knowledge beyond food *standards* will also help FSS to improve on trust.

2

Consistent and visible communications required, articulating relevance and involvement in consumers everyday lives – helping to keep people safe and healthy and not just working with industry and businesses on consumers' behalf.

3

Currently 'arms length': seen to be policing the industry, rather than being 'people' based but opportunity for FSS to be an expert voice and help reduce confusion on key health messages, for example.

# 4

## Food is safe - Adherence to the 4 Cs

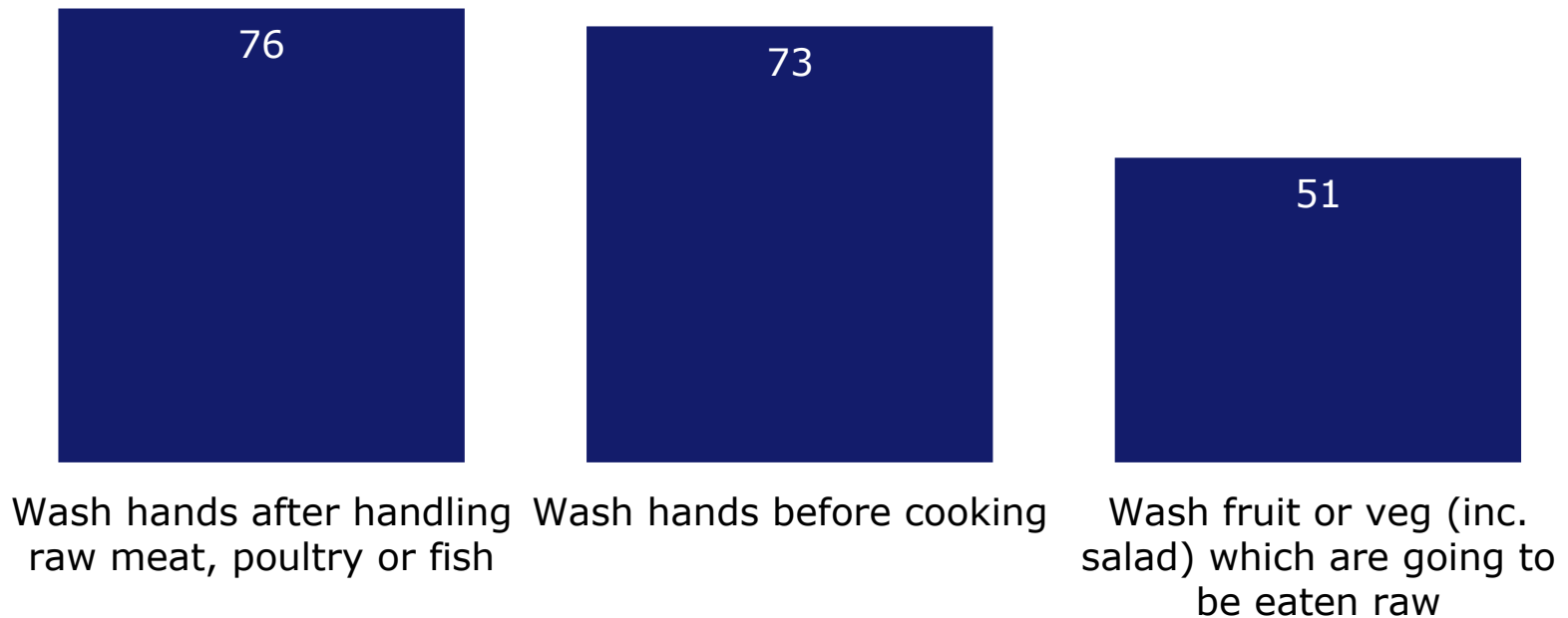


NB: Questions in this section primarily based on those with any responsibility for preparing and cooking food (956).

# Cleaning – consistent hand washing is the norm but scope for improvement on this, and on washing food to be eaten raw



% who claim to **always...**  
(Q19)



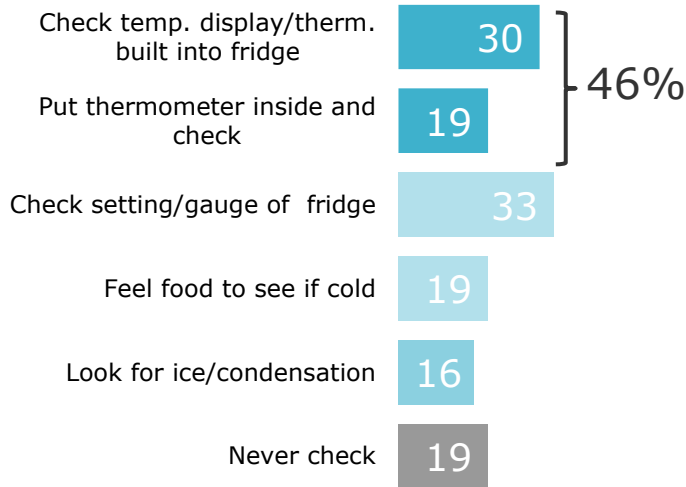


# Chilling – consumers could be better informed about accurately check fridge temperature and eating leftovers within 2 days

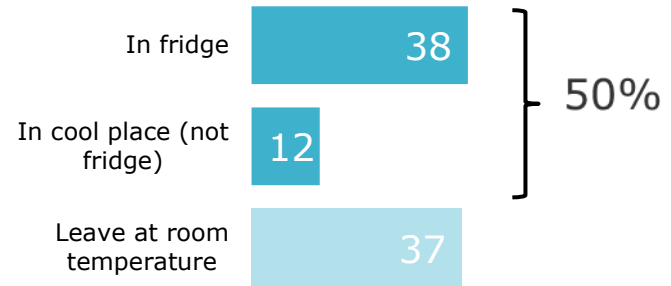
## 86%

Know correct temp of fridge (between 0 and 5c)  
(Q23)

### Main ways of checking fridge temperature (Q22)

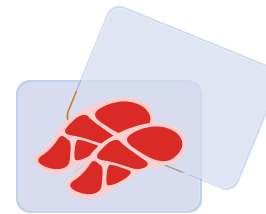


### Top 3 ways of defrosting meat or fish (Q20)



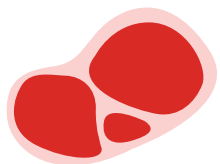
## 22%

Would keep an open packet of cooked/cured ham for up to 2 days before deciding not to eat it:



- 27% up to three days,
- 22% four days or more
- 22% would refer to label (Q32)

# Cross-contamination – clear need for further education with only around half following each of these recommended practices



60%

Use bottom shelf of fridge to store raw meat/poultry (Q24)

40%

Store raw meat/poultry in a covered container (63% in packaging) (Q25)



45%

**Never** wash raw chicken or poultry (Q19)

51%

**Never** wash raw meat other than chicken/poultry (Q19)

26%

**Never** wash raw fish or seafood (Q19)

51%

**Always** use different chopping boards for different foods/wash when switching between foods (Q19)

Top 3 reasons for washing chopping board between different foods (spontaneous) (Q21)

To avoid cross-contamination

56

Stop bacteria spread/transfer

15

Hygiene / cleanliness

9

61%

**Never** store open tins in the fridge (Q19)



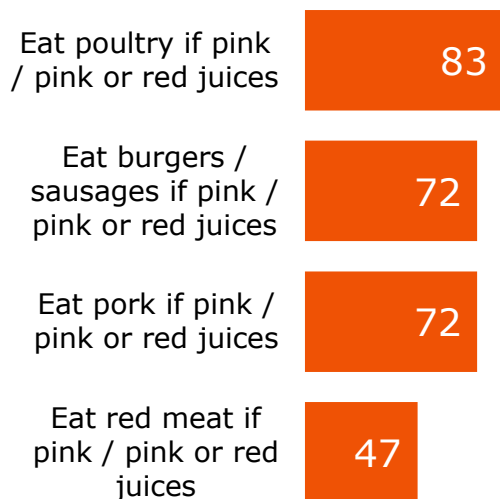
# Cooking – recommended practice more widely followed, but more info needed about reheating properly



## 74%

**Always** cook food until it is steaming hot throughout (Q19)

% who claim to **never...** (Q19)



## 88%

Would reheat cooked food once (78%) or less (11%) (Q33)

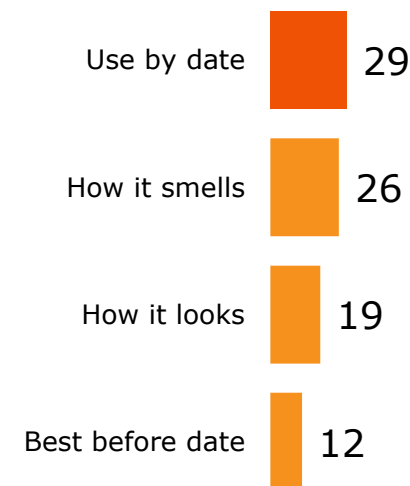
## 50%

Check food is cooked all the way through (check the middle is hot) when reheating (Q34)

## 37%

Know what campylobacter is (Q52)





Top 4 things looked for or think about when deciding if food is safe to eat / cook (Q26)



# There is some evidence of consumers changing food safety behaviours recently, recognising safety reasons



# Proportion undertaking '4Cs' behaviours

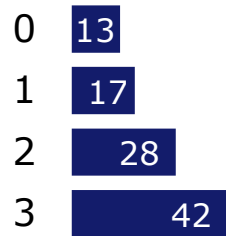
"C"	Recommended Practice	%
	Wash hands before starting to cook or prepare food	73% Always
	Wash hands immediately after handling raw meat, poultry or fish	76% Always
	Wash fruit or veg (inc. salad) which are going to be eaten raw	51% Always
	Temperature inside fridge should be between 0 and 5C	86%
	Meat usually defrosted in fridge (or in a cool place other than fridge)	50%
	Check fridge temperature using thermometer or built in thermometer	46%
	Would keep an open packet of cooked/cured ham for up to 2 days before deciding not to eat it	22%
	Raw meat / poultry in fridge should be stored in a covered container	40%
	Raw meat poultry should be stored at bottom of fridge	60%
	Use different chopping boards for different foods or wash chopping boards when switching between foods	51% Always
	Wash raw chicken or poultry	45% Never
	Wash raw meat other than chicken / poultry	51% Never
	Store open tins in the fridge	61% Never
	Wash raw fish or seafood	26% Never (25% n/a)
	Cook food until it is steaming hot throughout	74% Always
	Reheat cooked food no more than once	78% Once (11% never)
	When reheating check food is cooked all the way through	50% (check middle is hot)
	Eat chicken or turkey if the meat is pink or has pink or red juices	83% Never
	Eat burgers or sausages if the meat is pink or has pink or red juices	72% Never
	Eat whole cuts of pork or pork chops if the meat is pink or has pink or red juices	72% Never

# Average number of behaviours undertaken in each of the 4Cs show that Chilling and Cross-contamination actions least observed and Cooking most followed



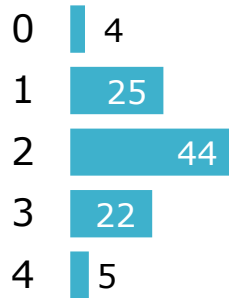
**2.0**

(out of 3)



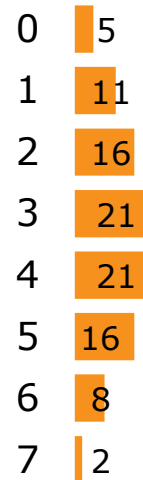
**2.0**

(out of 4)



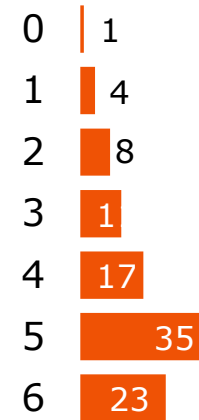
**3.3**

(out of 7)



**4.4**

(out of 6)

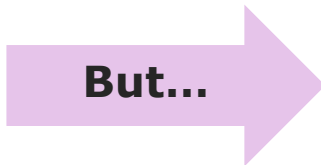


NB: Calculated as a proportion of those with any responsibility for preparing and cooking food.

# Extent to which recommended practice is followed varies widely: more scope for increasing average number rather than aiming for complete compliance

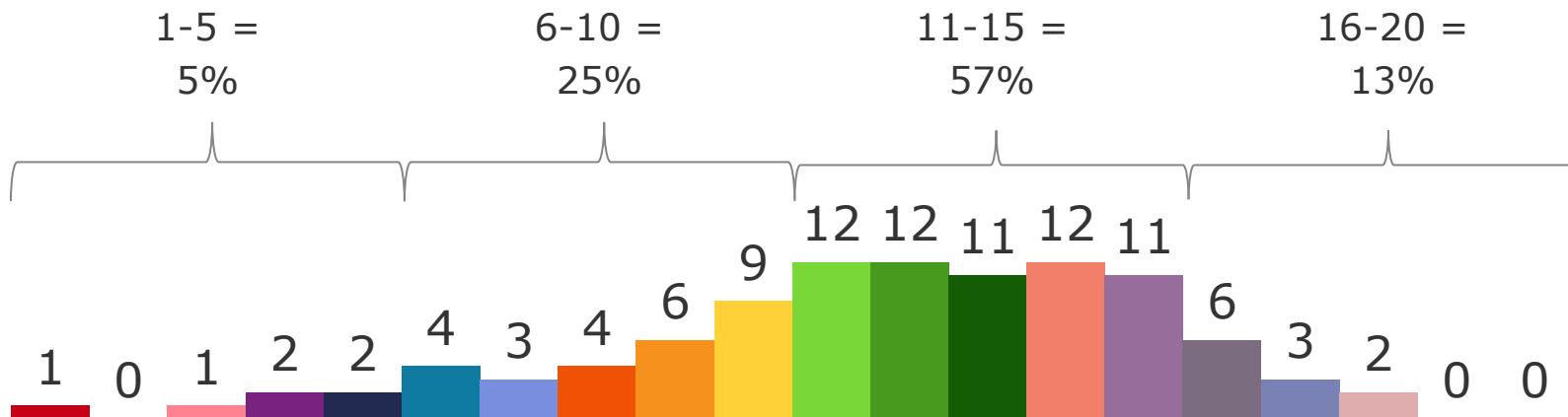
## 92%

Have clear information on how to prepare and cook food safely and hygienically (Q15)



## 11.7

Average number of 4C behaviours undertaken (out of 20)



NB: Calculated as a proportion of those with any responsibility for preparing and cooking food.

Focus on: Changing behaviour with clear communications on the most important areas where compliance is lowest and risk highest (particularly cross contamination)



11.7

76%

**Always** wash hands after handling raw meat, poultry or fish

22%

Keep open packet of cooked/cured ham for up to 2 days before deciding not to eat it

45%

**Never** wash raw meat or poultry

50%

Check food is cooked all the way through (check the middle is hot) when reheating

# Food is safe

1

Consumers are over confident in the ability to prepare / eat food safely – though virtually all claim to have clear information on how to do so, no-one follows all recommended practices; however seven in ten follow half or more.

2

20 behaviours is too many to communicate – need to focus on the most important areas where compliance is lowest and risk highest e.g.

- Never washing raw meat or poultry
- Length of time keeping leftovers
- Checking reheated food is cooked all the way through.

3

Set realistic targets now using segmentation to identify key audiences where there are opportunities for improvement.

4

Be aware of seemingly contradictory messaging – don't throw food away, but don't eat it after 2 days.

# 5

## Food is authentic - Labelling and food source





# There is some desire to find out more about where food comes from, driven by concern about authenticity

41%

Agree that **"I like to talk to people about things that interest or concern me about food and food issues"**

(Q11)

79%

Are concerned about 'food not being what the label says it is'

(Q13)

47%

Agree that "It worries me that what's in food might not be what's on the label"

(Q52)

55%

Agree that "I'd like to know more about where the food I eat comes from"

(Q52)

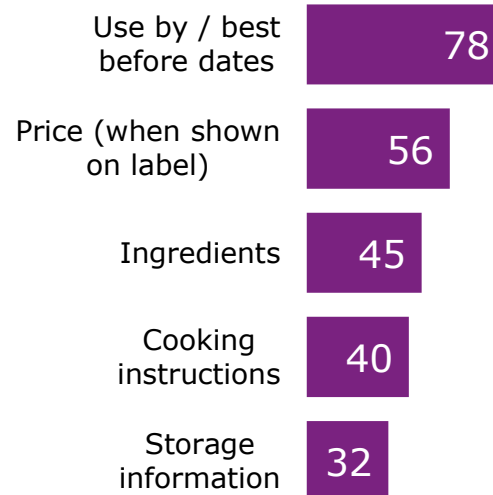


# Labels are widely referred to when both shopping and at home, primarily for date information



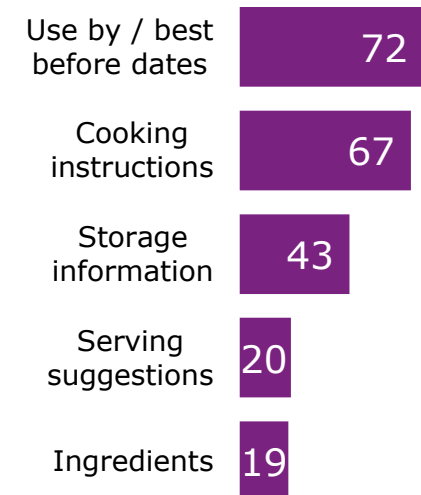
## 95%

Ever look at food labels when shopping  
– top 5 things looked for:  
(Q39)



## 93%

Ever read food labels at home  
– top 5 things looked for:  
(Q40)



# Good awareness of what the label information refers to but it is not necessarily displayed in a way that is understandable

70%

Have clear information on 'what the labels on the food I buy means'

(Q15)

52%

Agree "The information on food labels is clear and understandable"

(Q52)

50%

Agree "I trust the information on food labels"

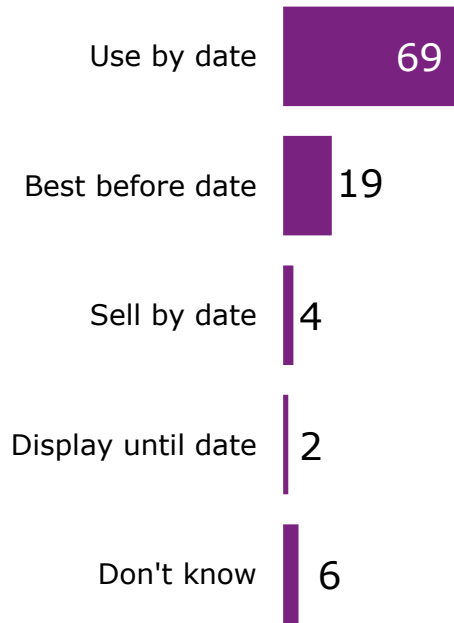
(Q52)



# Use by dates moderately well recognised and referred to as the best indicator of food safety

Which of these is the best indicator of whether food is safe to eat?

(Q27)



**Always** check use by dates when...

(Q28/29)



Buying food:

64%



About to cook / prepare food:

59%

The last date you would eat a food with a label that says...

(Q30/31)



Use by 15<sup>th</sup> Jan:

14-Jan 16

15-Jan 63

After 15 Jan 6

Depends on condition of food 13

Best before 15 Jan:

14-Jan 25

15-Jan 20

After 15 Jan 9

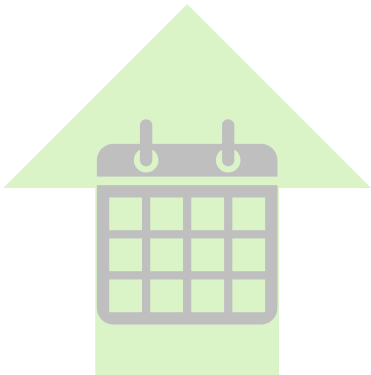
Depends on condition of food 37

# Focus on: Improving clarity of labelling, and understanding and usage of use-by information



Labels are widely referred to at all stages of the food journey, but not always clear and understandable (52%)

- Aiding consumers to interpret these will also reduce concerns about believability



Improve understanding that use-by dates are the best indicator of safety (69%) and increase checking of use-by date when buying (64%) and shopping (59%)

- These are personally relevant messages by which to engage consumers and help build trust in FSS

# Food is authentic

1

While consumers are most concerned with food that is safe, as well as pure and wholesome, free from additives and derived from well reared livestock, the appetite to learn more about food 'authenticity' is moderate.

2

Consumers know about labelling and the type of information provided on packaging but it is not always presented in a format that is understandable, or more importantly, is it necessarily believable.

3

As noted in recent qualitative research the 'horse meat' scandal continues to influence attitudes – making consumers unconvinced that the label accurately describes the product.

4

Label dates on the other hand can provide reassurance on safety and quality, and are well used. However confusion over 'use by' and 'best before' remains – marking this out as a potential user friendly and personally relevant message by which to engage consumers and help build trust in FSS.

# 6

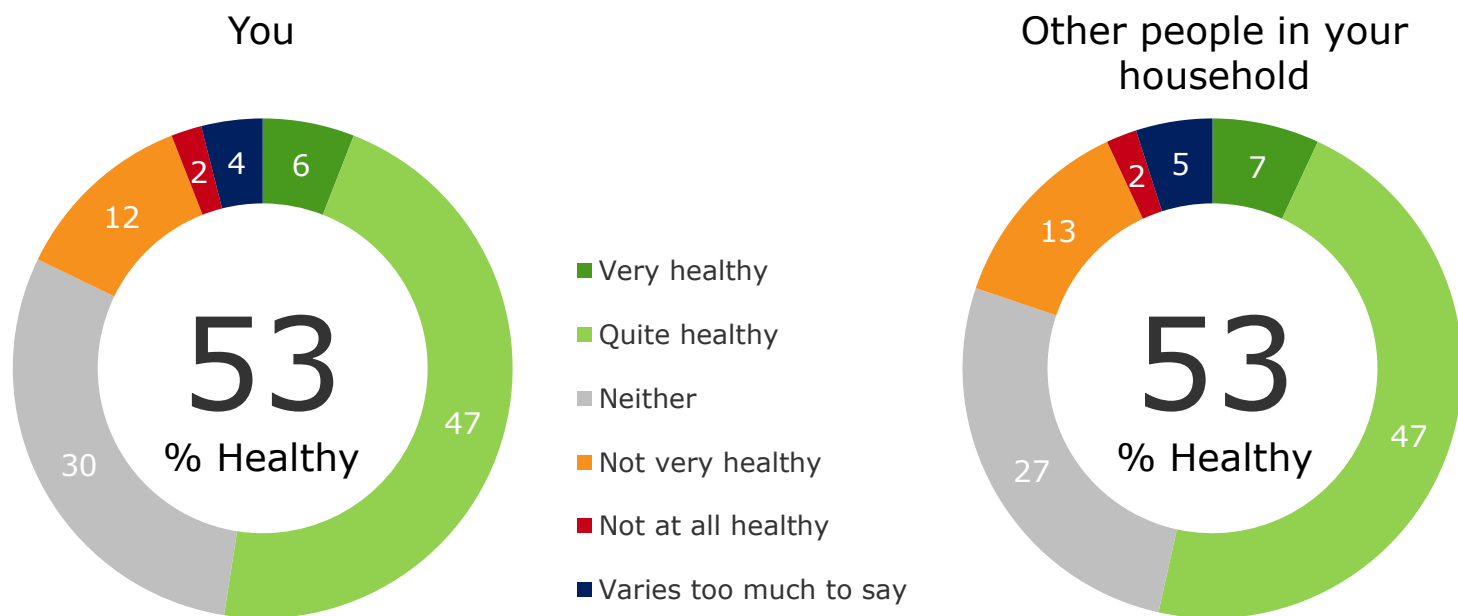
## Consumers choose healthier diets



# While many are fairly comfortable with their diet, there is also a significant degree of uncertainty as to whether it is healthy – for themselves or their family

Thinking about the kinds of foods you/your family eat and drink nowadays (both meals and snacks), how healthy do you feel these are?

(Q53/54)



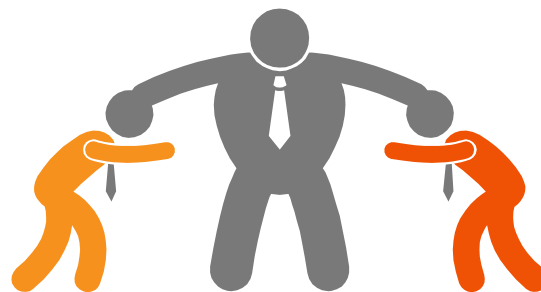


Though most feel they have clear information about eating healthily, uncertainty as to whether diet is healthy is clearly influenced by significant level of perceived expert contradiction and inconsistent messaging



89%

Have clear information on 'eating a healthy balanced diet'  
(Q15)



69%

Agree "The experts contradict each other over what foods are good or bad for you"  
(Q56)



35%

Agree "I get confused over what's supposed to be healthy and what isn't"  
(Q56)

# A significant proportion recognise Scotland's obesity problem, and are concerned about what is in food

## 74%

Agree "There are too many people who eat unhealthily in Scotland"  
(Q56)

## 50%

Are concerned about 'people having an unhealthy diet'  
(Q13)

## 56%

Disagree "the problems around people in Scotland being overweight are often exaggerated"  
(Q56)

How much does (the amount of... in food) concern you?  
(Q55)



Salt

Concerned at all  
(a lot or a little)

83%

Concerned  
a lot

34%



Sugar

86%

44%



Fat

87%

39%



Saturated  
fat

87%

40%

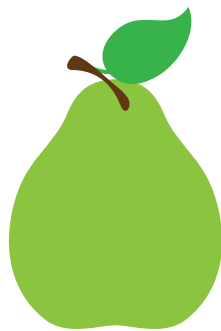
Links between health and diet are well established. But, the considerable degree of recognition of the need to change eating habits, highlights the need for more education and practical support



85%

Agree "I know that an unhealthy diet can cause lots of health problems, like cancer and heart disease"

(Q56)



51%

Agree "I know I need to do something to eat more healthily"

(Q56)



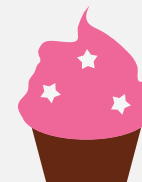
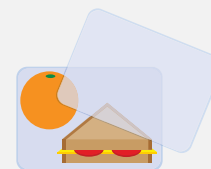
41%

Agree "I know I eat too many 'treats' like cakes, biscuits, chocolates or sweets every day"

(Q56)

# Whilst there is some evidence of consumers changing their diet, saving money is the key motivator, not health

Whether done more or less of each in last 6 months (Q75)



%

Eaten at home

Cooked at home

Bought more takeaway

Prepared packed lunches

Bought snacks/treats on special offer

**No change**

**57**

**56**

**50**

**70**

**61**



**38**

**38**

**7**

**15**

**14**

30 save money

28 save money

5 other

11 save money

8 save money

15 healthier

21 healthier

1 save money

7 healthier

5 other

**Top 3 reasons**

9 avoid waste

9 avoid waste

1 avoid waste

3 avoid waste

1 healthier



**5**

**5**

**43**

**15**

**25**

None

2 save money

32 save money

3 save money

14 healthier

**Top 2 reasons**

17 healthier

11 save money

# Children's diets are a worry for many, but contradictory views with many considering their children healthy

% Agree...



76%

There are too many children who are not a healthy weight for their age and height



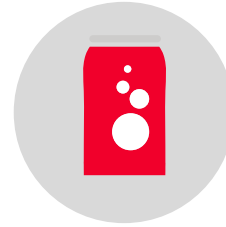
41%

I'm worried about the possibility of me or my children getting diabetes later in life



75%

I think my children are a healthy weight for their age and height



45%

I'm worried about the types of food my children are eating

How much do you agree or disagree with each of these statements (Q56)

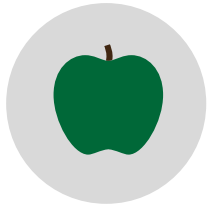
# Other diet statements

% Agree...



75%

I know that in Scotland, we have to make some significant changes to what we eat to be more healthy



66%

Eating healthy food makes me feel good about myself



46%

Eating things like cakes, biscuits, chocolates or sweets makes me feel good

% Disagree...



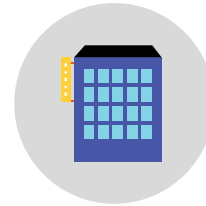
49%

It's not up to me, it's up to others such as supermarkets / manufacturers / government to make the food we buy healthier



49%

As long as you take enough exercise you can eat whatever you want



44%

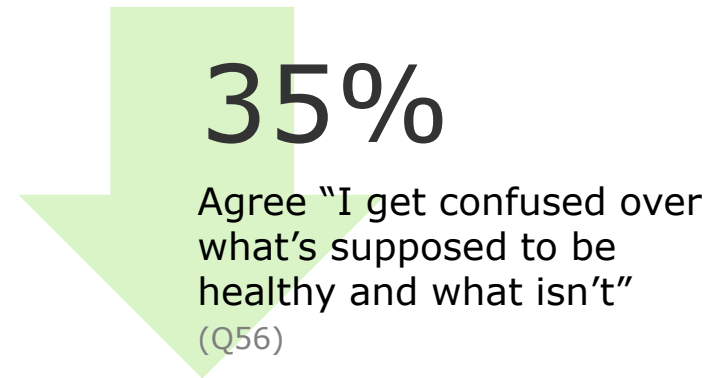
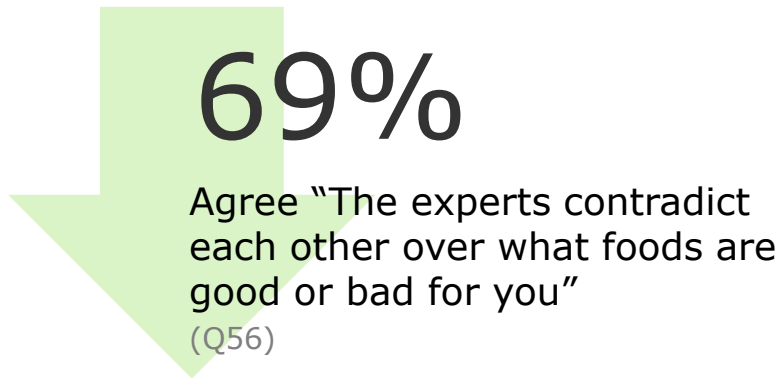
I tend to eat more unhealthily at home than at work

How much do you agree or disagree with each of these statements (Q56)

# Focus on: Being the voice of authority on healthy eating



Inconsistent and confusing messaging is a barrier to changing diet. There is a clear opening for FSS to be known for unequivocal and authoritative communications and to build a reputation as a trusted advisor



# Consumers choose healthier diets

1

The need to increase healthy eating is well recognised at a national and individual level.

2

One barrier to improvement is inconsistent and confusing messaging, illustrating the importance of unequivocal and authoritative communications - and an opening for FSS?

3

The significant discrepancy between awareness of what is unhealthy eating and the level of enjoyment it produces highlights the difficulty in achieving behaviour change.

4

Persuasion and education unlikely to be enough: consumers are aware of information and advice that is regularly made available.

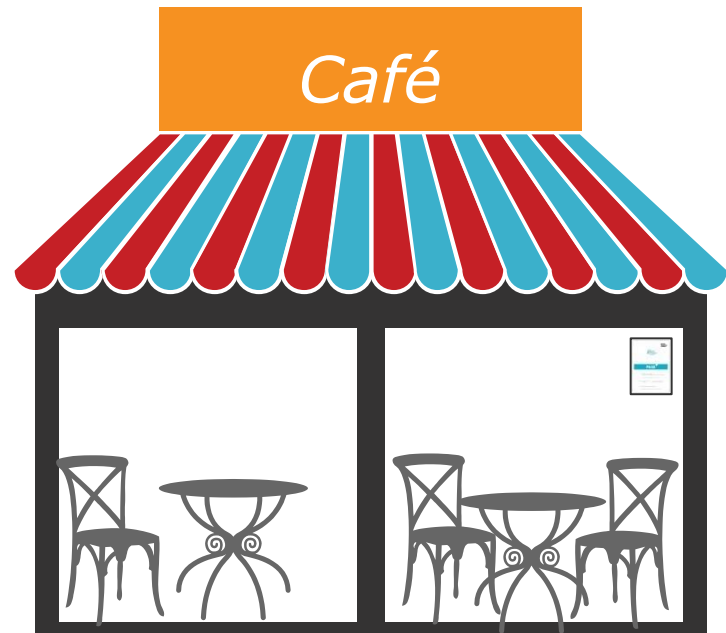
5

Other levers of behaviour change, such as legal and moral, also required in finding a long term solution to such a huge and entrenched social problem – what role for FSS in this?



# 7

## Responsible food businesses flourish



There is widespread concern about food hygiene when eating out, and a desire for establishments to pay more attention to this

78%

Are concerned about 'food hygiene when eating out'  
(Q13)

75%

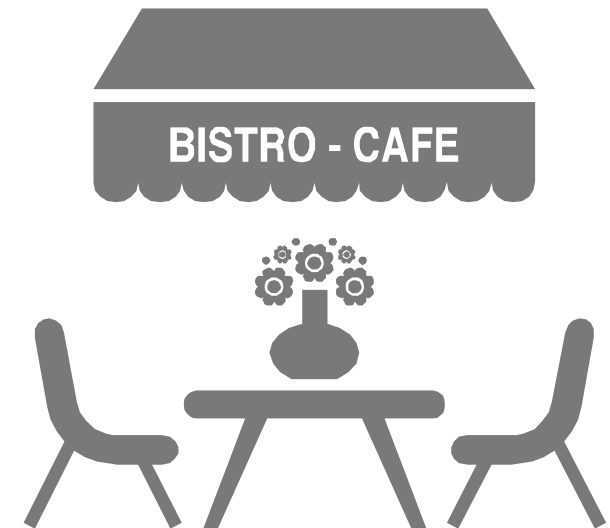
Agree "Restaurants, cafes, takeaways and catering establishments should pay more attention to food safety and hygiene"  
(Q52)

28%

Think the food they eat when eating out is less safe than the food at home  
(Q46)

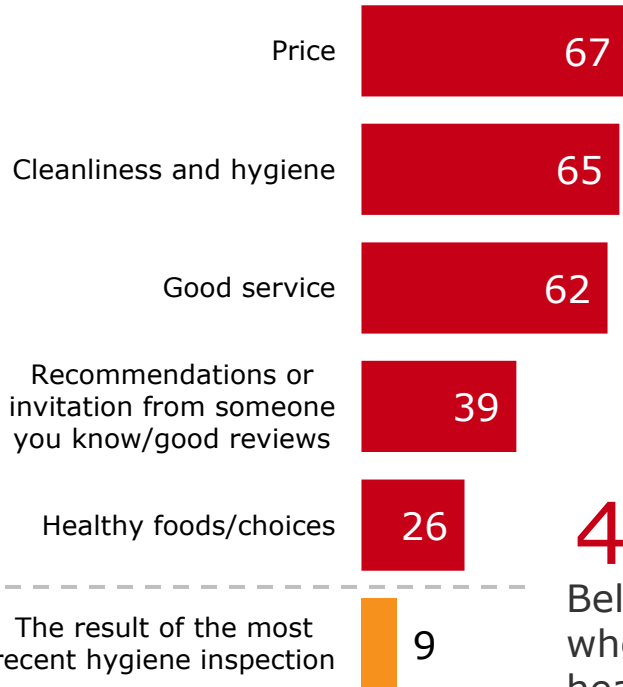
25%

Agree "I worry about getting food poisoning when I eat out"  
(Q52)



# Hygiene is a key factor in choosing where to eat out, but less likely to use a formal scheme to judge this

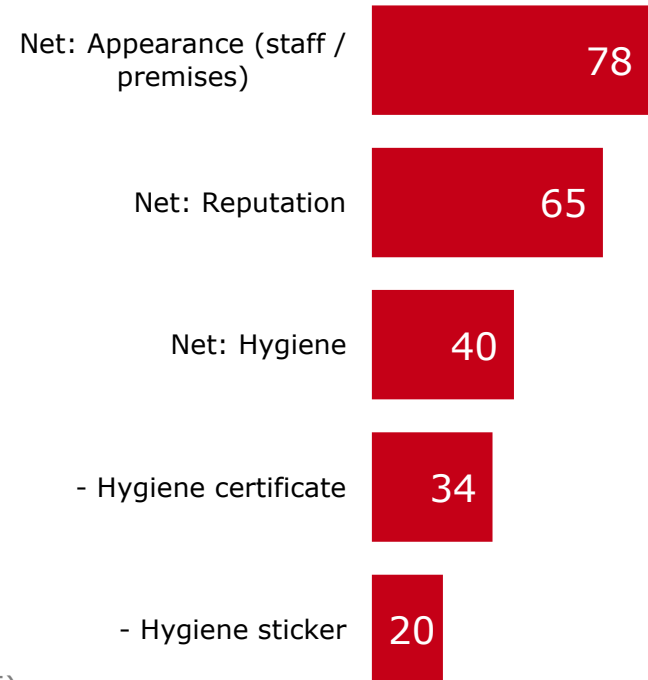
When you're deciding where to eat out, which of the following are important to you? – Top 5  
(Q44)



**45%**

Believe the food they eat when eating out is less healthy than at home (Q45)

How do you judge the hygiene standards of the places you eat out at or buy food from? – Top 5  
(Q47)



# Significant scope for improving awareness of hygiene inspections; FHIS not widely used but well received



26%

Have clear information on 'how to check whether the food I am eating in a café/bar/restaurant is safe'

(Q15)

50%

Recognised these images

(Q48)

- 44% in window
- 6% on website

26%

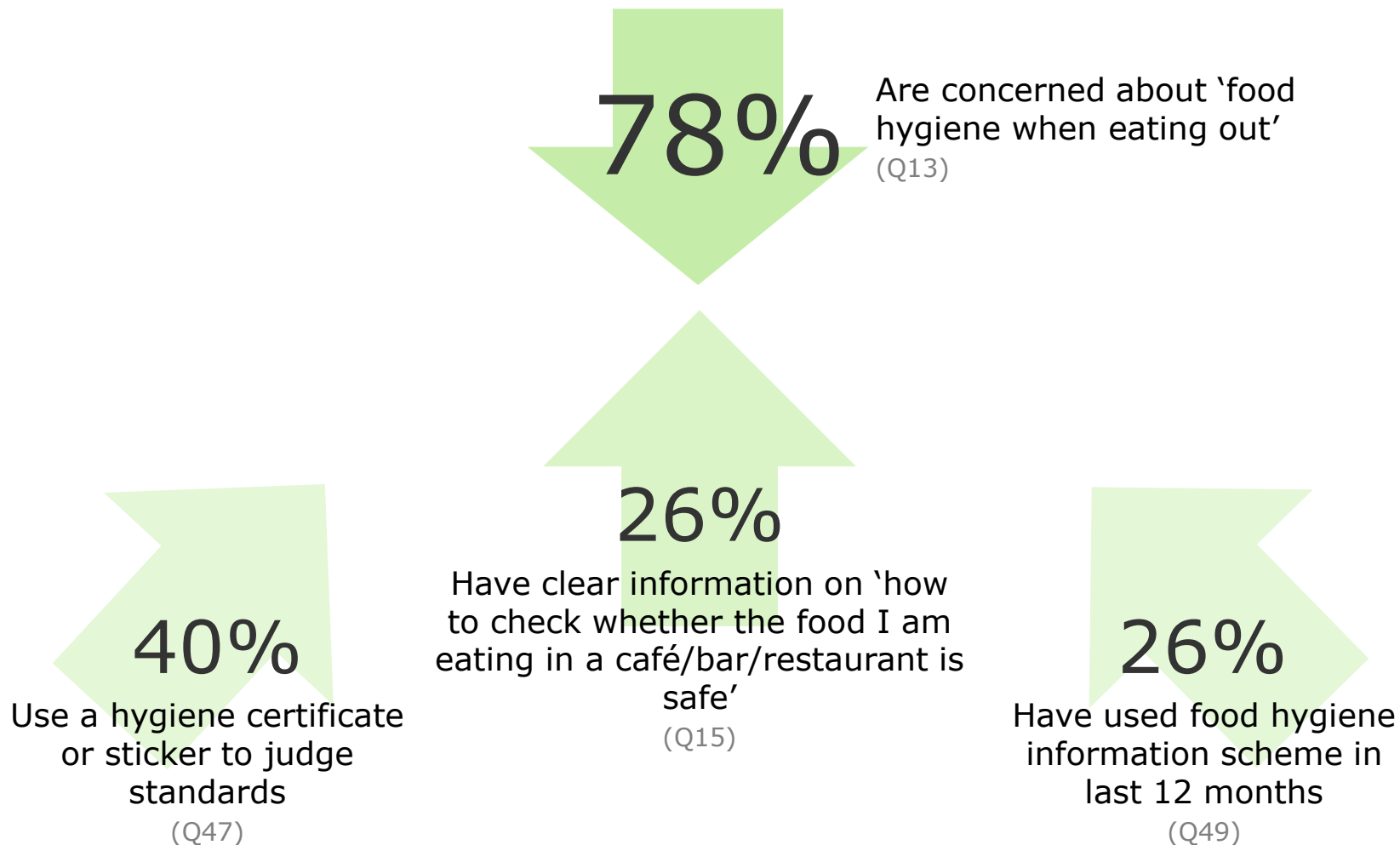
Have used food hygiene information scheme in last 12 months

(Q49)

- 90% window / door
- 8% on the internet

83% Influenced by checking (31% a lot)

# Focus on: Reducing concerns about eating out by actively promoting rating schemes



FSS Consumer Tracking Survey



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# Responsible food businesses flourish

1

Consumers are particularly aware of the potential risks when eating out and are keen for businesses to do more to improve hygiene.

2

Promotion of FSS' role in monitoring food standards across the industry is a good fit with the public's expectations, and will further increase trust in the organisation.

3

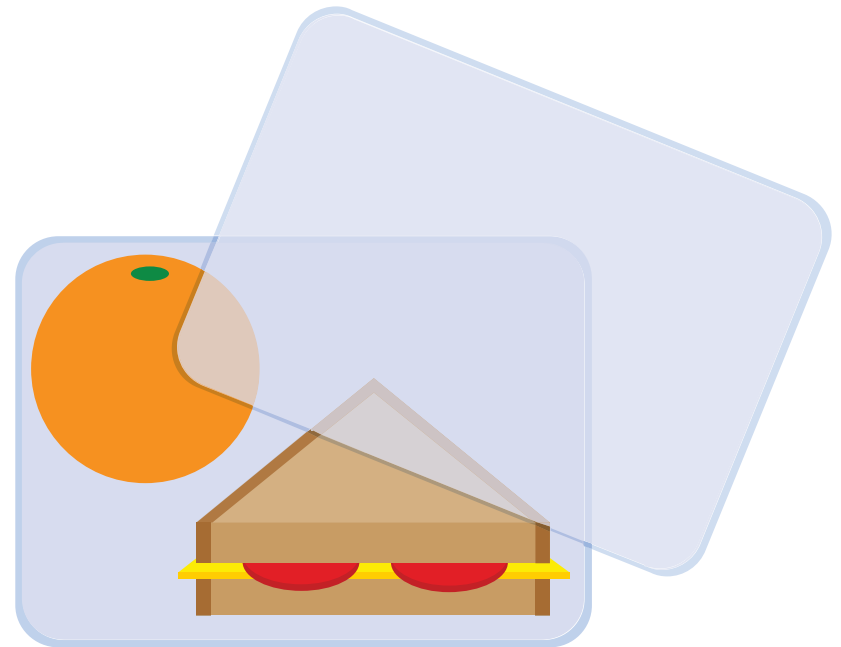
Though hygiene is a key consideration when choosing where to eat out, relatively few have enough information or use rating schemes to judge this. There is significant scope for a well known scheme, promoted by FSS, to help consumers decide.

4

Consideration should be given to whether 'responsibility' and ratings should go beyond hygiene, and also cover a number of criteria including healthy eating.

# 8

## Other food health and safety issues



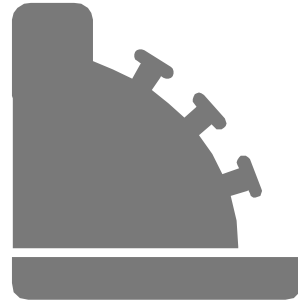
Though there is concern about the price of food restricting purchasing, it is not the most concerning issue for consumers



70%

Are concerned about food prices

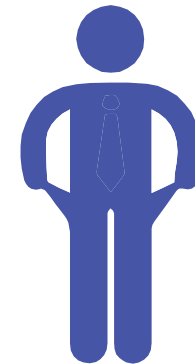
(Q13)



43%

Agree "the price of food means I often don't buy the food I would like to"

(Q11)



16%

**Most** concerned about 'not being able to afford a healthy, balanced diet'

(Q15)



# 9

## TNS point of view



# Insights and next steps

1

FSS is established and well trusted, but knowledge primarily linked to brand name.

Apply consistent branding across all activities, especially those with direct consumer focus e.g. healthy eating, use-by dates – where consumers need guidance from a *trusted* authority.

2

Compliance levels low on certain key aspects of food safety behaviours.

Use segmentation to identify groups who are open to change. Three areas where improvements required:

- Never washing raw meat or poultry
- Length of time keeping leftovers
- Checking reheated food is cooked all the way through.

3

Healthy eating is a recognisable problem – individually and nationally.

Leverage existing trust in keeping consumers safe to promote healthy eating messages; there is a need for a consistent and reliable source of information and advice.

4

Food safety when eating out is a widespread concern.

Considerable scope for expanding awareness and usage of food hygiene ratings scheme; could this be extended to include healthy eating?

# 10

## Appendices



# Base size and description summary

Question Number	Base Size	Base description
Q1-Q7, Q11-Q17, Q26-Q28, Q30-Q33, Q35-Q36, Q39-Q44, Q47-Q49, Q52, Q53, Q55, Q56, Q57, Q65, Q70-Q72, Q75, Q76	1003	All adults aged 16+ in Scotland (total sample)
Q8, Q9, Q10	450	All aware of FSS
Q18, Q19, Q21, Q22, Q29	956	All responsible for cooking and preparing food in the home
Q20	924	All responsible for cooking and preparing food in the home who ever eat or prepare fish or meat
Q23, Q24	950	All responsible for cooking and preparing food in the home and have a fridge
Q25	867	All responsible for cooking and preparing food in the home and store meat or poultry in the fridge
Q34	888	All who ever reheat food
Q37-Q38	405	All who have every had food poisoning
Q45, Q46	945	All who ever eat out
Q50, Q51	235	All who have used a food hygiene information scheme
Q54, Q58	757	All with more than one person in the household
Q59	49	All with someone else in the household with a food allergy
Q60-Q63	108	All with / living with someone with a food allergy
Q66-Q69	980	All responsible for food and grocery shopping