safetrak 3

Consumer Tracking Research

October 2004

safefood
Food Safety Promotion Board

Contents

amárach

Research Conducted by Amárach Consulting

Executive Summary

Introduction

One of ***safe*food's** primary objectives is to protect and improve public health by fostering and maintaining confidence in the food supply on the island of Ireland both on it own and in partnership with other bodies or organisations. One of the means by which ***safe*food** has set out to achieve this mission has been the development of a comprehensive communications programme targeted at consumers across the island of Ireland.

In tandem with this communications programme, a tracking research programme has been developed so as to both allow ***safe*food** to **evaluate** the effectiveness of its advertising on an on-going basis and to **provide *safe*food** with useful feedback regarding consumers' attitudes and behaviour towards food safety, hygiene and nutrition.

Key themes explored in the research have included:

- **People's eating habits, attitudes towards food safety and food hygiene, both inside and outside the home**
- **General food and health concerns**
- **Levels of awareness and effectiveness of *safe*food's advertising campaigns**
- **Consumers' views on the identity of key sources of information around food safety and different roles of responsibility**
- **Consumers' views on the actual *safe*food brand.**

The first wave of research took place in January 2003 with the findings from this piece of work serving as a useful benchmark in terms of where consumers on the island of Ireland were at that point in time with regard to food safety, hygiene and nutrition. Since then three subsequent "waves" of research have taken place (June 2003, January 2004 and July 2004), making it possible to evaluate changes in both behaviour and attitudes of consumers on the island of Ireland along with monitoring the effectiveness of various aspects of ***safe*food's** communications' activities.

General Food & Health Concerns

As a starting point, it is useful to briefly establish consumers' behaviour with regard to general food and health concerns. Nearly one in seven consumers are concerned about food safety issues in general with those who can recall ***safe*food's** advertising **more likely to be concerned than those who cannot.** Food poisoning would appear to be the number one concern consumers have in relation to current food issues and is the issue they would like to find out more about. Interestingly, less than half of consumers surveyed have changed their eating behaviour because of concerns around food issues. Those that have changed their behaviour are most likely to have done so because of concerns about obesity and foods high in fat, sugar and salt, suggesting health and diet are the key drivers of change, rather than concerns around methods of preparation or production.

Attitudes Towards Safe Eating and Food Hygiene Outside the Home

This section first set out to establish how involved consumers are in cooking meals in their household. The majority of consumers (eight in ten) cook **at least some of the time,** with just over one in two consumers regularly involved in the cooking process, suggesting that convenience foods and out of the home dining, is well and truly ingrained in the psyche.

This is supported by the fact that nearly one in four consumers or the equivalent of one million consumers, eat out in a restaurant at least once a week. New food outlets such as forecourts are also proving popular with consumers, with nearly a quarter of a million consumers purchasing food from garages at least once a week. These facts in themselves represent nothing new but do underline the increased emphasis that convenience foods play for today's cash rich, time poor consumer.

While consumers do not appear to be as concerned about hygiene in food outlets as they were six months ago, they are more concerned than they were in January 2003. This slight dip in concern may be partially explained by the attention the **smoking ban** has received this year. However, it is encouraging to see that those consumers who can recall ***safe*food** advertising appear to have higher levels of concern about hygiene than those who could not recall any of ***safe*food's** advertisements.

Concerns primarily relate to the **overall cleanliness of the premises, staff and/or kitchen** with over six in ten of those who had expressed concerns citing this as their key example. What is interesting however, is that there is still a little bit of ambivalence around food hygiene, as the majority of people (seven in ten) have **not** changed their behaviour with regard to different establishments as a result of their concerns. The 1.3 million consumers that have changed their behaviour were most likely to have stopped buying in takeaways and burger vans because of hygiene concerns associated with these outlets.

It is interesting that while seven in ten consumers are concerned about food safety in general and one in three are concerned about hygiene standards in restaurants, only about one in ten consumers actively look for hygiene signs/awards when visiting a restaurant. Of those that claimed to look for hygiene signs/awards, awareness levels tended to be low with less than one in four aware of the Q mark at an unprompted level. This figure is not surprising when put in context, as less than one in five consumers believe such hygiene awards strongly influence their decision to visit a restaurant or shop.

Food Labelling and Nutrition

This section looked at how consumers interact with food labelling and how accurately they could identify the correct amount of salt, fat and calories they should consume as part of their daily diet. It would appear that about one in four consumers actively read food labels on a regular basis, with the "best before date", "price" and "cooking instructions" being the most commonly sought information. Most consumers were happy that food labels provided the right amount of information, with only one in six believing information on labels was difficult to understand.

The vast majority of consumers could not accurately identify the correct amount of salt and fat they should eat over a typical day. While around two thirds of consumers stated they simply "didn't know", those that responded tended to suggest figures below the daily allowance rather than above. Consumers were much more inclined to suggest a figure for the amount of calories they should consume, with one in three accurately choosing between 1500 and 2500 calories (1500 for a women and up to 2500 for a man). This suggests that consumers, in particular women, have become much more educated about calories, largely driven by the growing "diet" culture in Ireland.

Advertising Awareness and Effectiveness

While many organisations and groups communicate the food safety message as part of their broader activities, ***safe*food** was the organisation that consumers on the island of Ireland were best able to remember advertising the issue of food safety during the past six months.

Just under one in four or nearly one million consumers across the island were able to recall at **a spontaneous level** having seen a television advertisement for ***safe*food**.

Television was the most effective medium when compared to radio or outdoor advertising. Of ***safe*food's** five campaigns run between January and July 2004, **Picnic** and **BBQ** tended to have the highest levels of recall, with over six in ten consumers remembering these TV commercials. These commercials were most effective at "getting the point across in a clear way" and "really capturing interest".

In more general terms, the advertisements in their entirety were successful in making most people who had seen them (highest for TV at nearly one in seven) **think more about food safety**, with over one in five actually **changing their behaviour as a result and a further one in five planning on changing their behaviour in the near future as a result.**

Sources of Information, Perceptions of Responsibility and the safefood Brand

Just over one in three people spontaneously identified ***safe*food** as being the organisation which they viewed as being responsible for providing information on food hygiene and food safety. This represents a slight decline over the last six months, but is still stronger than figures in January 2003. This may be partially explained again by the increased profile of the Department of Health during the first 6 months of 2004 because of the smoking ban and obesity debate.

***safe*food** continues to be the organisation consumers' associate most with food issues, with nearly two thirds of consumers' surveyed citing ***safe*food**. In tandem with this, the majority of the public (six in ten) are very confident about the current measures being taken by public bodies with regard to food safety, admittedly the lowest figure since benchmark, but still a very strong result.

The safefood Brand

Regarding the ***safefood*** brand itself, it is a brand, which the majority of consumers are aware of– **six in ten now recognise this logo**.

Based on their experience of the organisation or because of exposure to it's advertising, six in ten consumers believe ***safefood*** is a **very knowledgeable** and **trustworthy** organisation. Seven in ten consumers believe ***safefood*** is an important initiative by the government with one in six believing the organisation should spend more money promoting food safety.

Conclusion

safefood has become established in the minds of consumers on the island of Ireland as being the key organisation responsible for advertising food safety and promoting good hygiene when it comes to purchasing and preparing food. Undoubtedly, ***safefood's*** advertising is having a strong impact, with those who have seen or heard the advertising more likely to be concerned about food safety and hygiene and to have changed their behaviour as a result, than those who have not seen or heard it.

At present, the advertising is resonating most strongly with (a) women in their thirties and forties many of whom it may be assumed have primary responsibility for food preparation and diet within their households and (b) younger age groups thereby reflecting the media channels through which ***safefood*** is advertising its messages.

Introduction and Methodology

A Brief History

safefood was established under the Good Friday Agreement in 1999 to protect and improve public health by fostering and maintaining confidence in the food supply on the island of Ireland in partnership with others.

In order to achieve this mission a comprehensive communications programme using **television, radio, print** and **outdoor advertising** has been developed and implemented.

In tandem with this advertising campaign has been the implementation of a comprehensive island of Ireland **consumer tracking research programme.** This research programme has been put in place primarily to:

- **Provide *safefood* (and where appropriate other stakeholders) with information about consumers' concerns in the realm of food safety**
- **Provide *safefood* with feedback on certain aspects of consumer behaviour and attitudes in relation to food preparation and food safety**
- **Help *safefood* evaluate the effectiveness of its advertising campaigns on an on-going basis.**

The first wave of this research was conducted in **January 2003.** This was a comprehensive piece of research as it was intended that the findings from this work would serve as a useful benchmark in terms of monitoring change going forward, either as a result of initiatives undertaken by ***safefood*** (e.g. promotional activity) or indeed as a result of events or issues relating to food safety.

The Benchmark Survey

In January 2003, ***safefood*** commissioned Amárach Consulting to carry out a survey of adults aged 15-74 across the island of Ireland. The purpose of this benchmark survey was to examine the following:

- **People's attitudes and behaviour with regard to food hygiene, food preparation and food safety**
- **People's perceptions of other bodies/organisations (government and otherwise) with responsibility for providing information in areas relating to food safety and hygiene;**
- **People's eating habits**
- **Awareness and effectiveness of *safefood's* advertising campaigns**
- **People's awareness and perception of the organisation *safefood* and its brand.**

The purpose of this report is to present key findings emerging from the **most recent research conducted in July 2004** and where appropriate to show how these compare to both the benchmark study and subsequent research conducted in June 2003 and January 2004.

Methodology

Eight hundred and twenty eight face-to-face interviews were conducted throughout the island of Ireland over a three-week period in June/July 2004. This sample was structured so that it represented the full adult population thereby ensuring that ***safe*food** gained a good understanding of **the population at large.**

So for example, in conducting this piece of quantitative market research interlocking quota controls were set in terms of age, gender, marital status and social class for both NI and ROI. These quota controls in turn are arrived at by examining the most recent statistics published by the census offices. Basically what this means is that field interviewers are given set quotas regarding how many people of each gender and within each social class, age bracket and marital status they should interview so as to ensure that the sample replicates the population as closely and accurately as possible.

Weighting is then applied to social class, gender, age, region and marital status so that we can deduce (within a small margin of error of +/- 3%) how the total population is feeling or behaving. Hence the total number of adults aged 15-74 yrs living in Northern Ireland is 1.213 million based on latest statistics from the Office of National Statistics' census of population, released December 2003, while the number of 15-74 year olds living in the Republic of Ireland is 2.898 million people based on the 2002 census statistics. The aforementioned population statistics combined provide an overall island of Ireland figure of 4.111 people aged 15-74 years.

Each interview was conducted face to face, by a trained field researcher and lasted 25-30 minutes. The methodology of both this wave and the preceding waves of research (for comparative purposes) is summarised in Table (a) below.

Number of interviews	Benchmark Study (January 2003)	Safetrak 1 (June 2003)	Safetrak 2 (January 2004)	Safetrak 3 July 2004
Island of Ireland	900	827	863	828
ROI	600	510	536	510
NI	300	317	327	318
Sample	Face to face interviews with adults aged 15-74 in their own homes – 25-30 minute duration			

Report Structure

This report is sub-divided into seven sections as follows:

Section 1 – General Food and Health Concerns

Section 1 focuses on concerns consumers have around food safety and other health related issues. As well as investigating the impact established food and health concerns are having on consumer behaviour, a number of contemporary issues are also explored, to help build a more complete picture of the issues that are likely to impact on consumers' eating habits. The food concerns consumers would like to know more about are also identified.

Section 2 – Attitudes Towards Safe Eating and Food Hygiene Outside the Home

This section examines the dietary habits of the population at large and their approach to safe eating. It also looks at people's behaviour and attitudes in relation to food preparation and food hygiene.

It highlights the frequency with which people on the island of Ireland eat out before moving on to look at what aspects of hygiene concern them (if any); what impact this is likely to have on their buying behaviour with regard to retail and catering outlets and how aware they are of hygiene signs and/or awards in both restaurants and supermarkets.

Section 3 – Food Labelling and Nutrition

Section 3 examines how consumers use labelling on food products and identifies the types of information the majority of consumers look for when referring to labelling on a day-to-day basis.

This section also investigates how aware consumers are of nutritional recommendations regarding the correct amount of salt, fat and calories they should consume over a typical day.

Section 4- Advertising Awareness and Effectiveness of safefood advertising

This section looks at the level of both prompted and unprompted awareness of ***safefood*** advertising. It discusses the effectiveness of ***safefood's*** advertising both in terms of what messages people took from the advertising and whether they actually changed their behaviour as a result.

Section 5 – Sources of Information and Perceptions of Responsibility

Section 5 deals with the public's identification and perception of key sources of information around food hygiene, food safety and nutrition. It also touches on people's views as to what could be done to improve overall food safety and their level of confidence in current measures being taken.

Section 6 – The safefood Brand

This brief section looks at how recognition of the ***safefood*** brand has evolved over the year and how the wider public view ***safefood*** as an organisation.

Section 7 – Key Conclusions

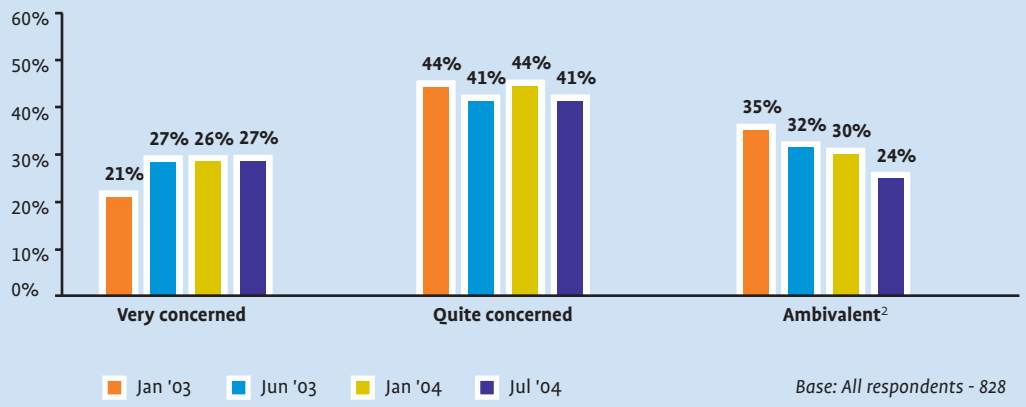
1. General Food and Health Concerns

This section focuses on consumer's concerns around food safety and how these concerns have affected eating behaviour. A number of contemporary food issues, which have received a large amount of media coverage were also included in safetrak 3 and are compared with food issue concerns that have been evaluated since January 2003. The food concerns consumers would like to know more about are also identified.

Food Safety Concerns in General

Nearly seven out of every ten Irish adults are concerned about food safety issues with just under one in three consumers stating that they are **very** concerned. Females are twice as likely as males to be very concerned about food safety issues, with 'gate-keepers'[1] again being most predominant. Older age groups are also more likely to be more concerned about food safety issues than those under the age of 25, with a positive correlation between those who recall ***safefood's*** advertising and those who are concerned about food safety issues.

CHART 1(i) – LEVEL OF CONCERN ABOUT FOOD SAFETY ISSUES



It is clear from the above table that the numbers concerned have increased since this research was first conducted in January 2003, with those ambivalent to the issue declining, thereby **pointing towards a gradual shift in attitude towards food safety and an overall growing awareness of food safety issue.**

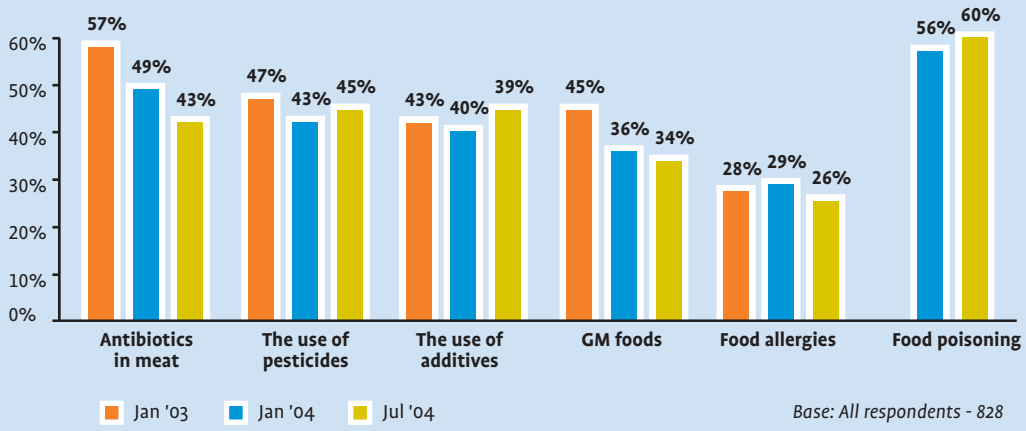
[1] 'Gate-keepers' are defined as older females, married and more likely with dependent children who are also responsible for the main grocery shop.

[2] Ambivalent has been defined here as those who are either not concerned or have no opinion.

1.2 Other Food Issue Concerns

In the context of the level of media coverage given, in the past, to issues such as antibiotics in meat and the use of pesticides it is interesting to examine how concerned people are about these topics as illustrated by:

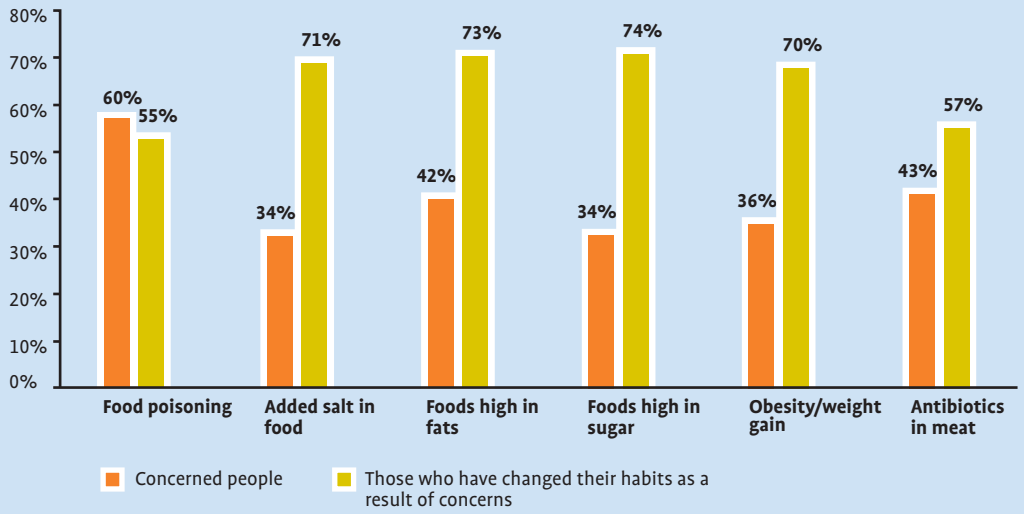
CHART 1(ii) – OTHER FOOD ISSUE CONCERNS



Immediately it is clear that concern on particular issues has tapered off in the last year in many areas, however food poisoning appears to be of major concern for consumers. There is just a slight female bias with higher socio-economic groups more likely to be concerned about these issues than lower income groups.

While concern was expressed by nearly half the population in some areas (e.g. use of pesticides), the **effect** of this concern in terms of changing eating habits has risen across the board, particularly in respect of nutritional issues, with major changes in behaviour around issues such as added salt in the diet and foods high in sugar. Those most inclined to have changed their eating habits in this regard are more likely to be female than male and generally concerned about food safety.

CHART 1(iii) – FOOD CONCERNS AND THEIR IMPACT ON THE EATING BEHAVIOUR OF THOSE WHO ARE CONCERNED



Bases: Concerned people - All respondents – 828; Those Who are Concerned & have changed their eating habits – filtered by those concerned

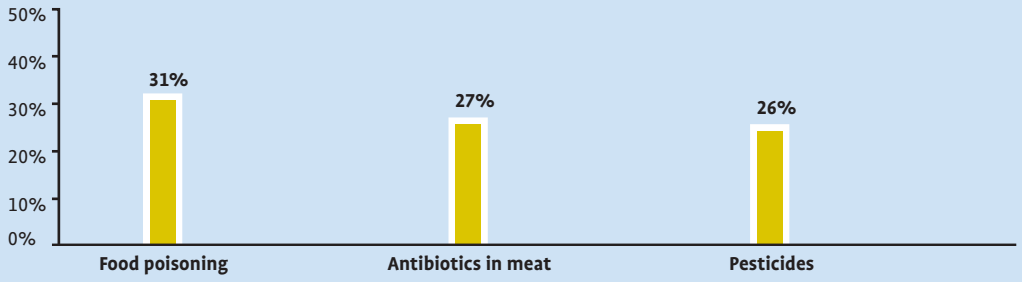
Those who are concerned about **foods high in salt, fats and/or sugar and obesity** are the most likely to have changed their behaviour. People who are concerned about added salt in food and who have changed their behaviour as a result are more likely to be married and/or aged between 35 and 74. Those who are concerned about obesity/weight gain and who have changed their behaviour as a result tend to be females aged between 25 and 49 are single and from an AB[1] background.

While consumers have changed their behaviour around issues affecting their diet specifically, it is interesting that the issues consumers would like to find out more about are issues with which they have least control over i.e. antibiotics in meat and pesticides. Consumers were most concerned about food poisoning, with males as likely as females to want to find out more about this issue skewed towards those aged 15-24, single and in the C2DE[2] bracket. Those that wished to find out more about antibiotics in meat were more likely to be female, middle aged and gatekeepers, while those wanting to know more about pesticides tended to be aged between 25-34 and from a slightly more affluent household.

[1] AB=Professional or Upper Middle Class; Managerial or Middle Class

[2] C2 D E=Skilled Working Class/Skilled manual; Other working class/Partly skilled; Lowest Level of Subsistence/Unskilled

CHART 1(iv) – % THAT WOULD LIKE TO KNOW MORE ABOUT THE FOLLOWING FOOD ISSUES



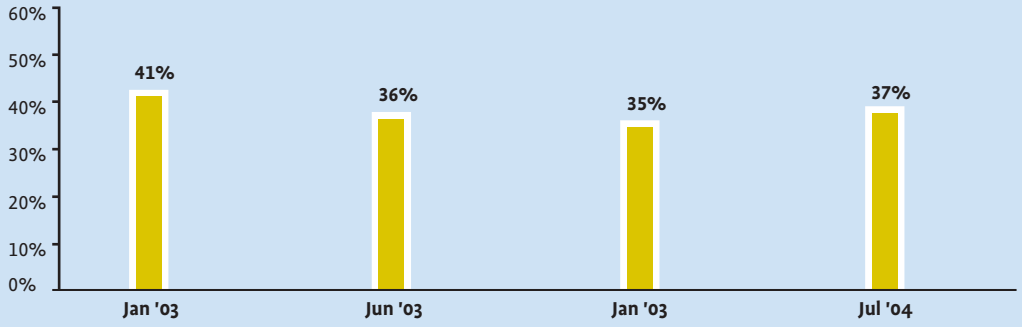
Base: All respondents - 828

1.3 Confusion Still Exists

Finally, while there is no doubt that there is now a wealth of information sources about food safety and healthy eating, it does appear that there may still be conflicting messages reaching members of the public.

For example, in January 2003, four in ten adults agreed that they were often confused by the many different messages about food safety and healthy eating, with this figure approaching similar levels again in July 2004. While the figure has declined slightly then over the last year, there are still a large number of consumers purporting to be confused. Confusion around food safety and health messages tends to be skewed towards those over the age of 65 and, interestingly, older married women - gatekeepers.

CHART 1(v) – THOSE WHO AGREE THAT THEY OFTEN GET CONFUSED BY THE MANY DIFFERENT MESSAGES ABOUT FOOD SAFETY & HEALTHY EATING



Base: All respondents - 828

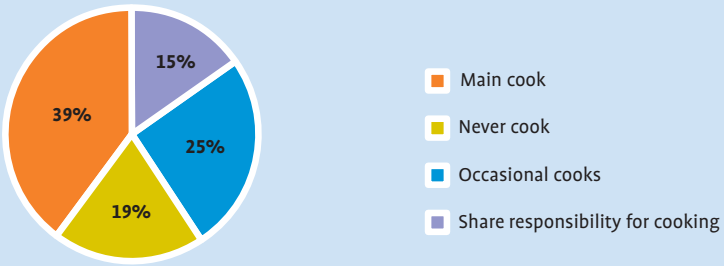
2. Attitudes Towards Safe Eating and Food Hygiene Outside the Home

This section sets out to explore how consumers interact with the host of food outlets now available on the island of Ireland. The research investigates current cooking behaviour, followed by the frequency with which people eat out before moving into looking at what aspects of hygiene concern them (if any); what impact this is likely to have on their behaviour with regard to an outlet in which they purchased food, how aware they are of hygiene signs and/or awards in both restaurants and supermarkets and whether the presence of such hygiene signs can affect behaviour positively.

2.1 Cooking Behaviour

It would appear that most consumers can cook, based on the frequency with which the majority of people claim to cook. Just under one in five do **not** cook with this heavily skewed towards males. Younger age groups and/or those who are single are also more likely than others not to cook often because they tend to eat out more regularly or substitute with ready meals and other convenience foods.

CHART 2(i) – COOKING BEHAVIOUR



Base: All respondents - 828

As expected, those most likely to be the main cooks within a household, are what would be classified as typical 'gate-keepers' – i.e. older females, married and more than likely with dependent children, who are also responsible for the main grocery shop.

Those who claim to share responsibility for cooking within a household are heavily skewed towards those aged between 25 and 49, reflecting the fact that all/both members of the household are working, as opposed to just one person assuming the 'house-keeping' role. Occasional cooks are heavily skewed towards those under the age of 25.

2.2 Eating Out

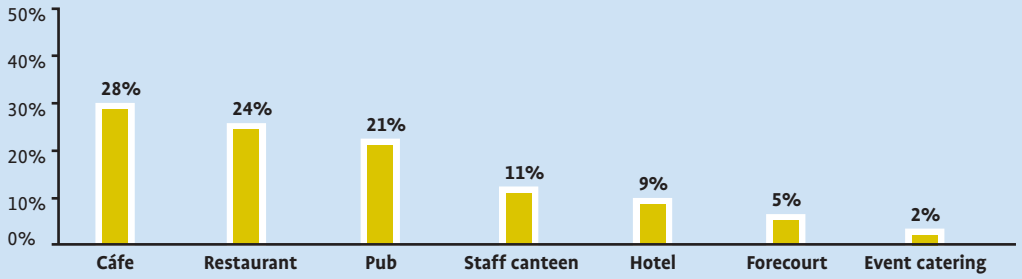
Eating out has increased in the last ten years, with revenues from restaurants doubling from 1991 -1996 (Revenue Statistical Report 1996).

Nearly one in three consumers across the island claims to **eat out in a café and one in four eats out in a restaurant at least once a week.** It is important to note however, the those eating outside the home has dropped in the last six months. This could be the combination of the introduction of the smoking ban and current economic conditions.

A more recent phenomenon is the development of the purchasing takeaway food from forecourts by more than 200,000 consumers on the island of Ireland at least once a week.

Chart 2 (ii) summarises the numbers who are eating out in a variety of outlets at least once a week.

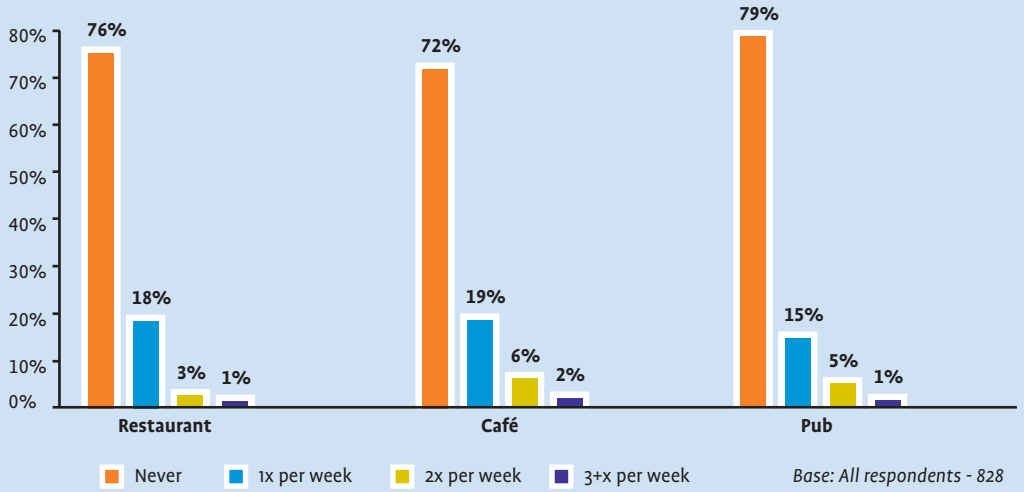
CHART 2(ii) –THOSE WHO WOULD EAT OUT IN DIFFERENT FOOD SERVICE OUTLETS AT LEAST ONCE A WEEK



Base: All respondents - 828

As growth in restaurants, cafés and pubs serving food has been substantial over the last decade, it is interesting to examine in more detail the frequency with which people visit them. Chart 2(iii) illustrates, for example, that as many as 19% of the total island of Ireland population, (or in real terms over 740,000 people), eat out in a restaurant (as distinct from a bar or café) at least once a week, with those in their twenties as likely to eat outside the home as those in their fifties. However, those over 65 are unlikely to visit restaurants on a regular basis as are those from rural or working class backgrounds.

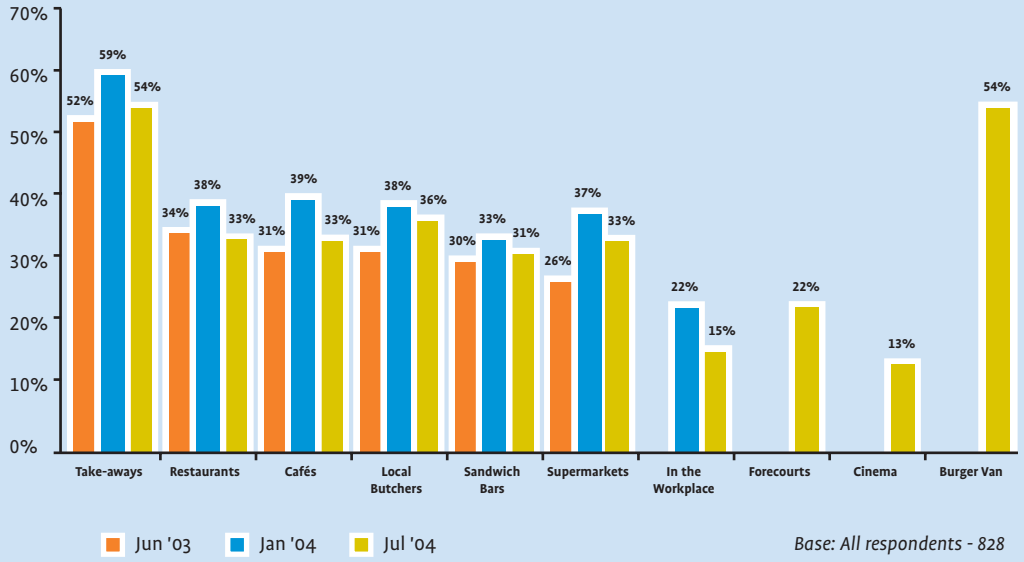
Chart 2(iii) –Frequency With Which People Eat Out In Restaurants, Cafés, And/Or Pubs



2.3 Hygiene Concerns

Just over three out of ten consumers on the island of Ireland expressed concerns about hygiene in restaurants and cafés rising to more than one in two (54%) for take-aways and burger vans respectively. It would appear that overall concern about hygiene in food outlets has dropped slightly in the last 6 months, however, this may in part be attributed to more pressing issues affecting consumers in the Republic of Ireland such as the smoking ban and obesity debate. In contrast, hygiene concerns in Northern Ireland have risen slightly where no such smoking ban exists. In each case, there is an increase on the figures expressing concerns in June 2003 and may be indicative of people becoming **more aware of what constitutes good hygiene rather than hygiene standards having actually slipped since mid-2003.**

CHART 2 (iv) – THOSE THAT ARE CONCERNED ABOUT HYGIENE IN ANY OF THE FOLLOWING PLACES

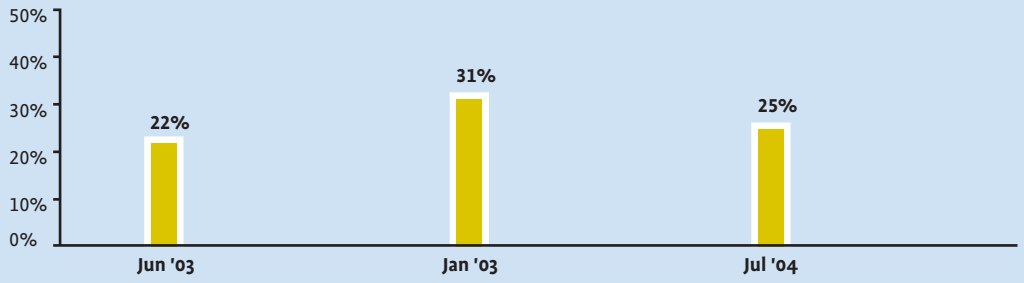


Base: All respondents - 828

Burger vans, cinemas and forecourts were additional options to safetrak July 2004, and have proved to be the food service providers that consumers are most concerned about. Those concerned about hygiene in this area tended to under 35 and from an ABC1 background, suggesting that concern is skewed towards young professionals and students.

Respondents were also asked in both waves of research if they were concerned about hygiene in their own home. Not surprisingly, concern is more pronounced among those that could be classified as traditional gatekeepers.

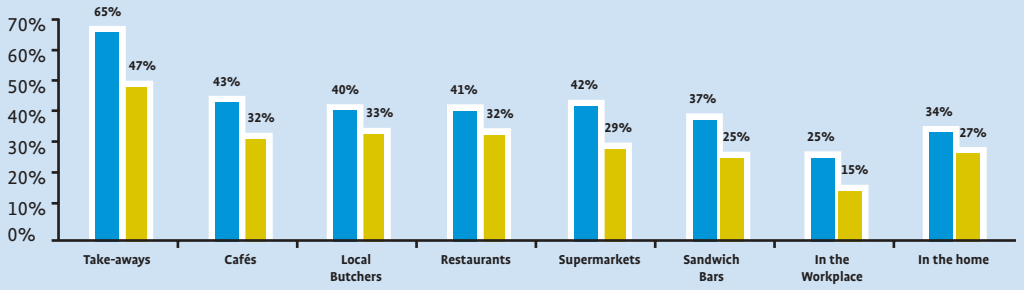
CHART 2(V) – THOSE WHO ARE CONCERNED ABOUT HYGIENE IN THEIR OWN HOME



Base: All respondents - 828

It is also worth commenting on how much more pronounced hygiene concerns are, for each of the establishments, among those who are able to recall having seen and/or heard ***safefood*** advertising (See section 3.1). This point can be further illustrated by Chart 2 (vi) with the impact of television advertising clearly demonstrated.

CHART 2(VI) – THOSE THAT ARE CONCERNED ABOUT HYGIENE IN ANY OF THE FOLLOWING PLACES



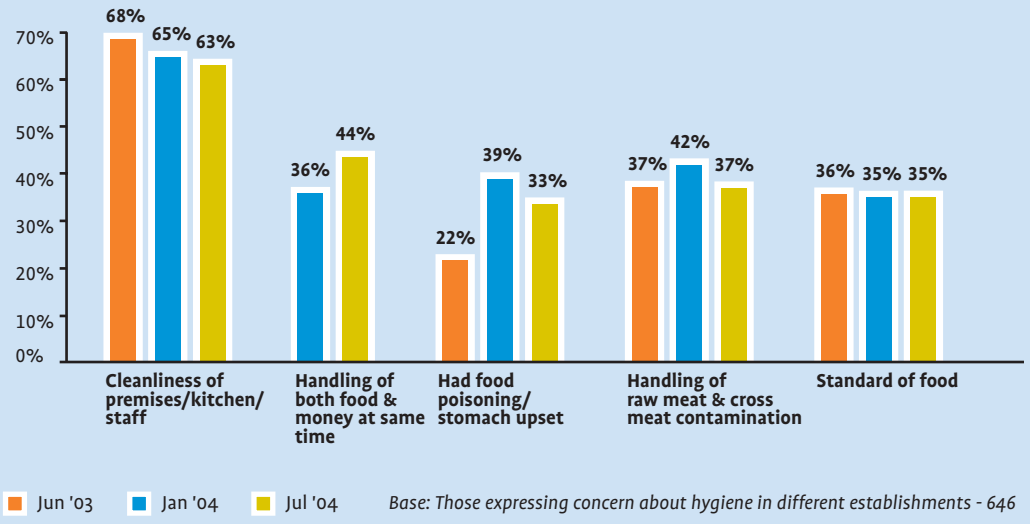
Base: All respondents - 828

2.4 Aspect of Hygiene Causing Concern(s)

The respondents who claimed to have been concerned about hygiene in at least one of the above mentioned establishments were given the opportunity to say which aspect(s) of hygiene had caused concern. **Overall cleanliness of the premises/kitchen and/or staff** was the most frequently cited, with over **six in ten saying that this was the aspect of poor hygiene which they had most noticed.** This was fairly consistent across all age groups and both genders.

Other concerns cited included **the handling of both money and food by the same member of staff,** (without use of gloves or hand washing in between) **the handling of raw and cooked meat** (i.e. cross contamination risks); and **the overall standard of the food** (for example it was badly cooked or considered 'off'). **Over three in ten** of those who had expressed concerns **had actually experienced some form of stomach upset or food poisoning and considered it to be directly related to the premises they were concerned about.**

CHART 2(vii) – ASPECT OF HYGIENE CAUSING CONCERN

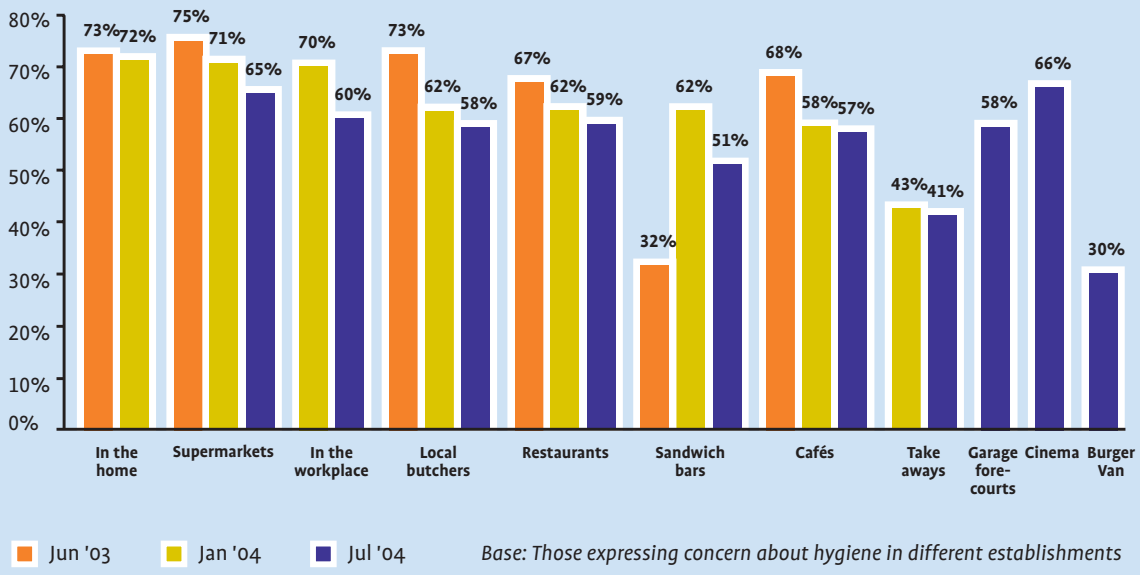


Base: Those expressing concern about hygiene in different establishments - 646

2.4 Impact on Behaviour of Food Hygiene Concerns

These results are particularly interesting because they demonstrate that a certain amount of ambivalence still exists around food hygiene. The majority of consumers have not actually changed their behaviour as a result of concerns around food hygiene. This may well be because their concerns were not, in their view, particularly serious, but is more likely reflective of people's unwillingness to change their behaviour unless they feel compelled to do so or they may not have a choice. However, it is important to note that while most consumers have **not** changed their behaviour in relation to the various food outlets, they eat in, a trend is developing that suggests that consumers are beginning to be more proactive in regards to food hygiene.

CHART 2(viii) – THOSE WHO HAVE NOT CHANGED THEIR BEHAVIOUR WITH REGARD TO DIFFERENT ESTABLISHMENTS AS A RESULT OF THEIR CONCERNS RELATING TO POOR HYGIENE



Base: Those expressing concern about hygiene in different establishments

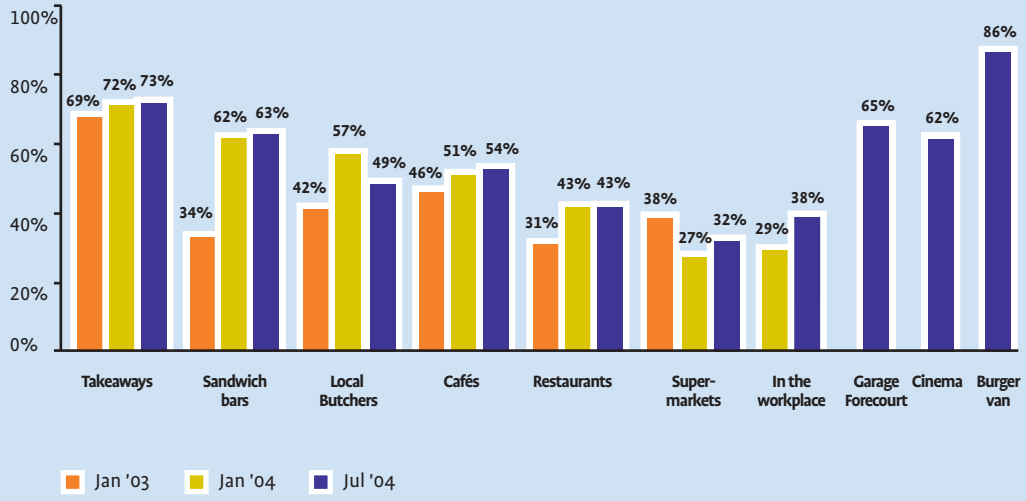
The profile of those **who have actually changed** their behaviour as a result of hygiene concerns is again slightly skewed towards 'gate-keepers' probably reflecting their better understanding of food-related hygiene. However, there are a number of exceptions to this, with younger males most likely to have stopped buying food at the local butchers, cinema and in the workplace.

Chart 2(viii) highlights how more and more consumers are beginning to vote with their feet and not return to a food establishment if the hygiene standards do not meet their expectations (with the exception of the local butcher). When coupled with how many more people did express concerns in this wave of research (compared to June 2003), the translation into the number of people actually 'voting with their feet' is considerable. For example, just under 1.4 million people expressed concern about hygiene in restaurants, with 560,000 changing their behaviour as a result of these concerns (460,000 in June 2003) and nearly a quarter of a million consumers actually stopping buying food in a restaurant(s) (143,000 in June 2003) because of concerns in relation to hygiene standards.

Obviously a change of behaviour could be a minimal one, and may be as simple as just ordering a food item which is perceived to be "safe" rather than actually ceasing all purchasing behaviour in a particular establishment. Hence, the research asked respondents who had both expressed concerns about food hygiene **and** changed their behaviour as a result of their concerns, if they had actually stopped buying in those establishments.

Again, the change since June 2003 is stark (with the exception of supermarkets) as illustrated in Chart 2(ix).

CHART 2 (ix) – THOSE WHO HAVE STOPPED BUYING IN DIFFERENT ESTABLISHMENTS BECAUSE OF HYGIENE CONCERNS

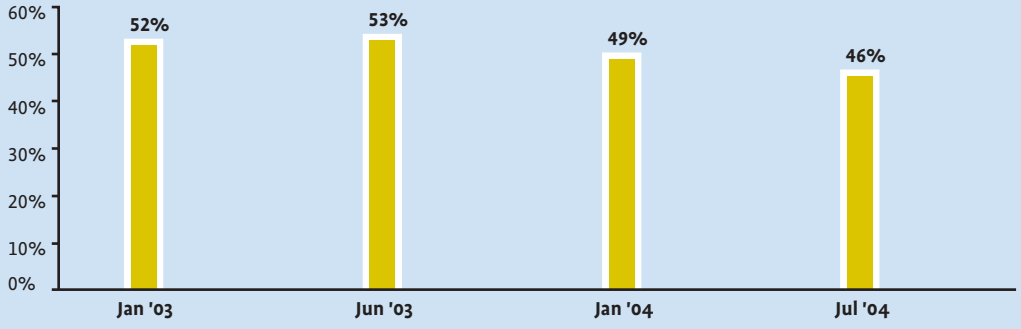


Base: Those expressing concern about hygiene about establishments AND who have changed their behaviour as a result - 89

The growing number of respondents that have stopped buying in certain food outlets contrasts with the number of consumers that claim to have become more aware of food safety issues in the past six months.

However, while it is clear that fewer people have **'become more aware of food safety issues in the last six months'** than the previous research this may be because of, in economic terms, diminishing returns. **In other words as more people become aware of food safety issues there are fewer who need to become aware.**

Chart 2 (x) – Those Who Agree That They Have "Become More Aware of Food Safety Issues Over the Past Six Months"

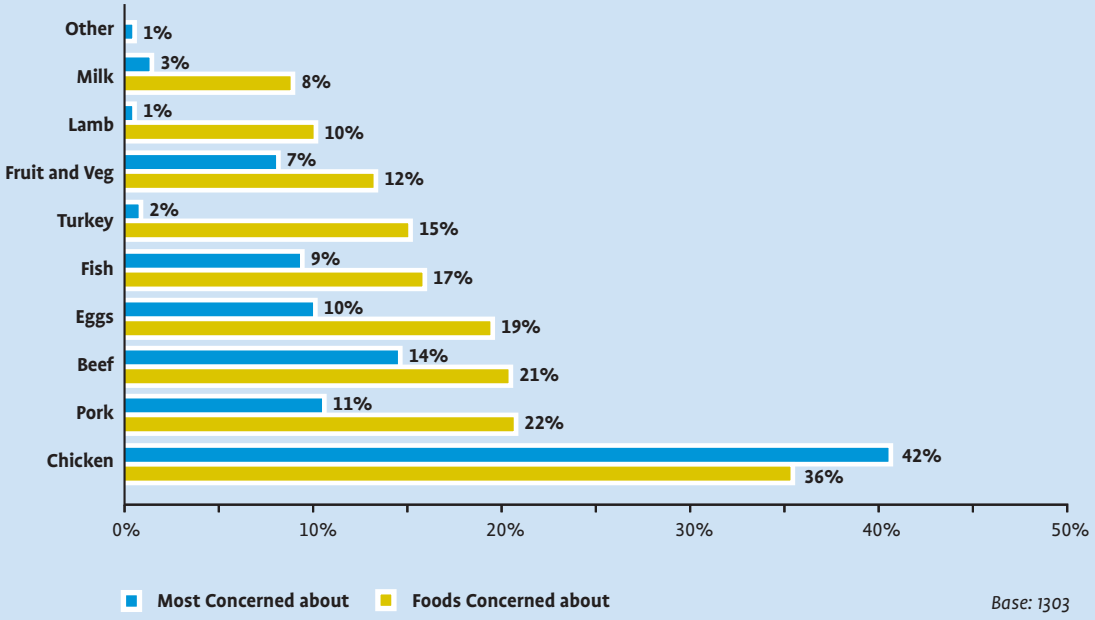


Base: All respondents - 828

2.5 Concern around certain foods

safefood commissioned additional research in September 2004 to identify the foods consumers were concerned about in terms of how they were produced, packaged, sold in shops or handled in the home. Of those surveyed, just under six in ten had concerns in relation to the food they consumed, highlighting how consumers tend to be more concerned about the actual food itself than the premises in which they are prepared. Chicken would appear to be the food consumers are most concerned about, followed by pork, beef, eggs and fish, which may have been predicted given the food scares these commodities have suffered in the last five years e.g. Avian flu, salmonella, BSE, Foot and Mouth, etc

CHART 2 (xi) – FOODS CONSUMERS ARE CONCERNED ABOUT IN TERMS OF HOW THEY ARE PRODUCED, PACKAGED, SOLD IN SHOPS AND HANDLED IN THE HOME.

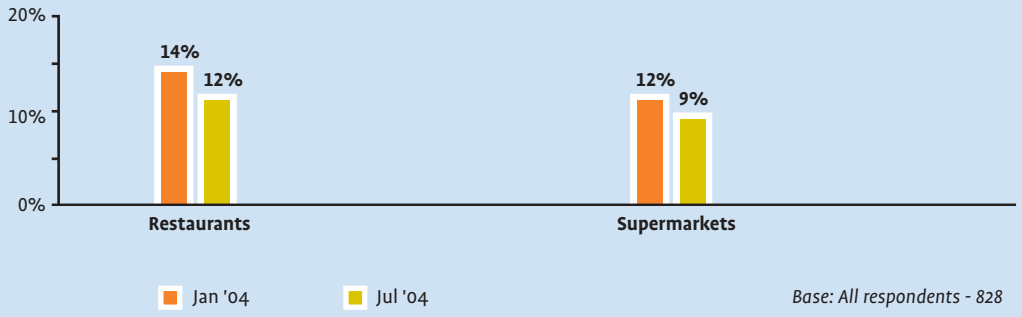


Base: 1303

2.6 Hygiene Sign/Award Awareness

It is clear from the preceding sections that the public's awareness of hygiene is increasing. Hence, it might be assumed that there may be a more acute appetite for hygiene signs and/or awards in key food establishments. This research asked respondents if they ever looked for hygiene signs and/or awards when visiting either restaurants or supermarkets.

CHART 2(xii) – THOSE WHO LOOK FOR HYGIENE SIGNS AND AWARDS WHEN VISITING RESTAURANTS AND/OR SUPERMARKETS



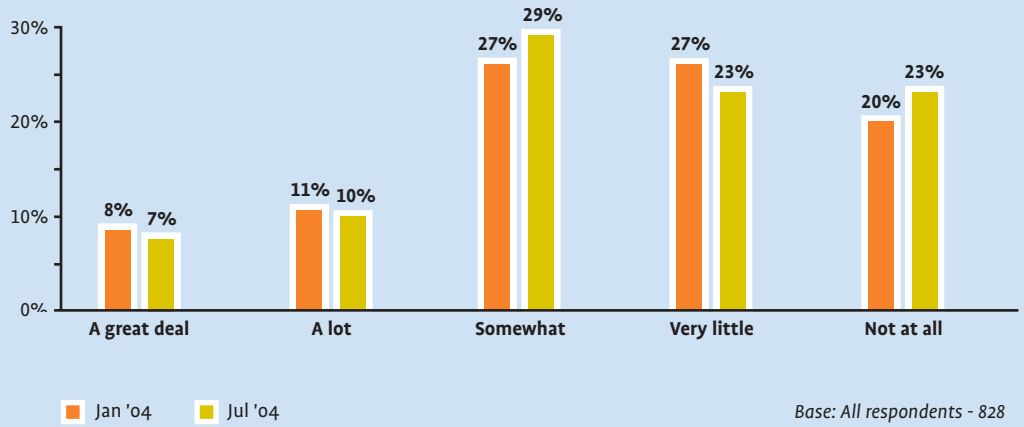
As illustrated in Chart 2(xii) it can be seen that, **irrespective of relative small promotional activity, significant numbers of consumers look for such endorsements when visiting either restaurants or supermarkets.**

Those most likely to look for hygiene signs and/or awards tend to be those who are in general more concerned about food safety. There is little difference in attitude among the various age groups, however, females and those from ABC1 backgrounds are more likely to be aware of these signs.

In terms of impact on behaviour, it is just a small minority who are influenced a great deal by hygiene awards and/or signs. Those that are most likely to be influenced by them tend to be more concerned about food safety and, as indicated by the research, more likely to be able to recall ***safefood*** advertising (either television or radio).

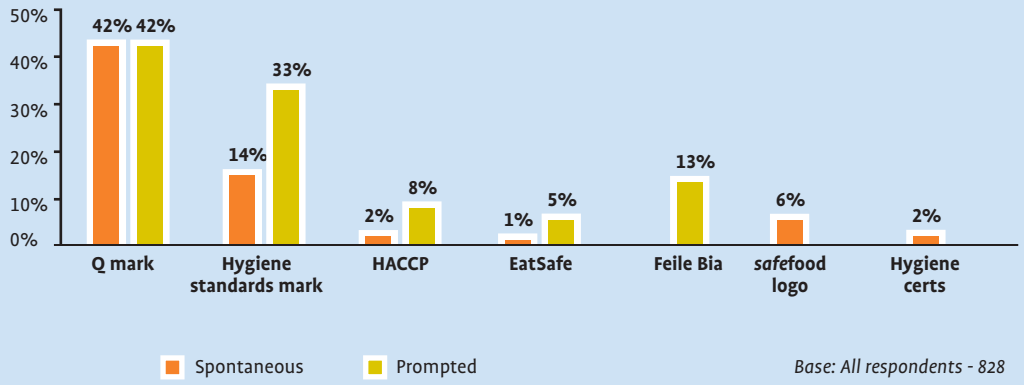
Those who pay little heed are skewed towards males, those from working class backgrounds as well as younger consumers, particularly those under the age of 25. This is not surprising as this profile is least likely to visit restaurants or supermarkets on a regular basis.

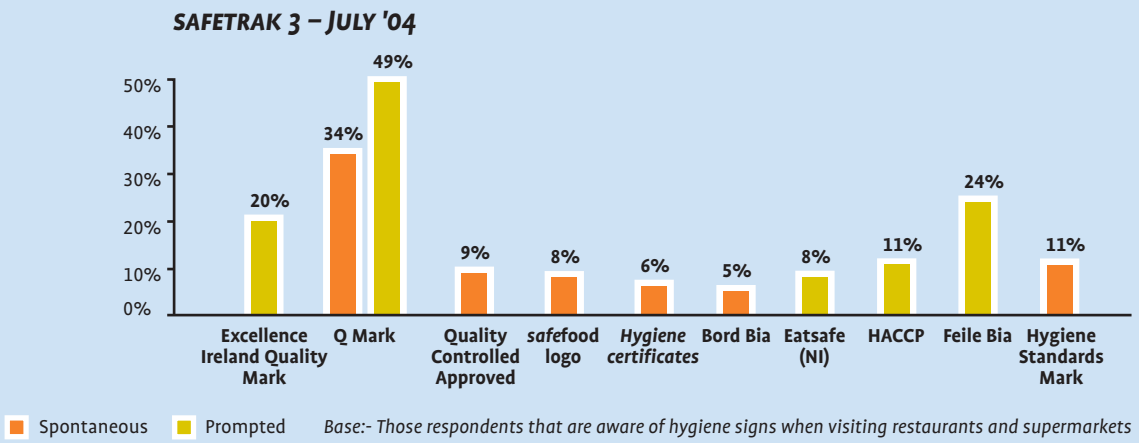
CHART 2(xiii) – THE EXTENT TO WHICH HYGIENE SIGNS/AWARDS INFLUENCE DECISIONS TO FREQUENT PARTICULAR RESTAURANTS/SHOPS



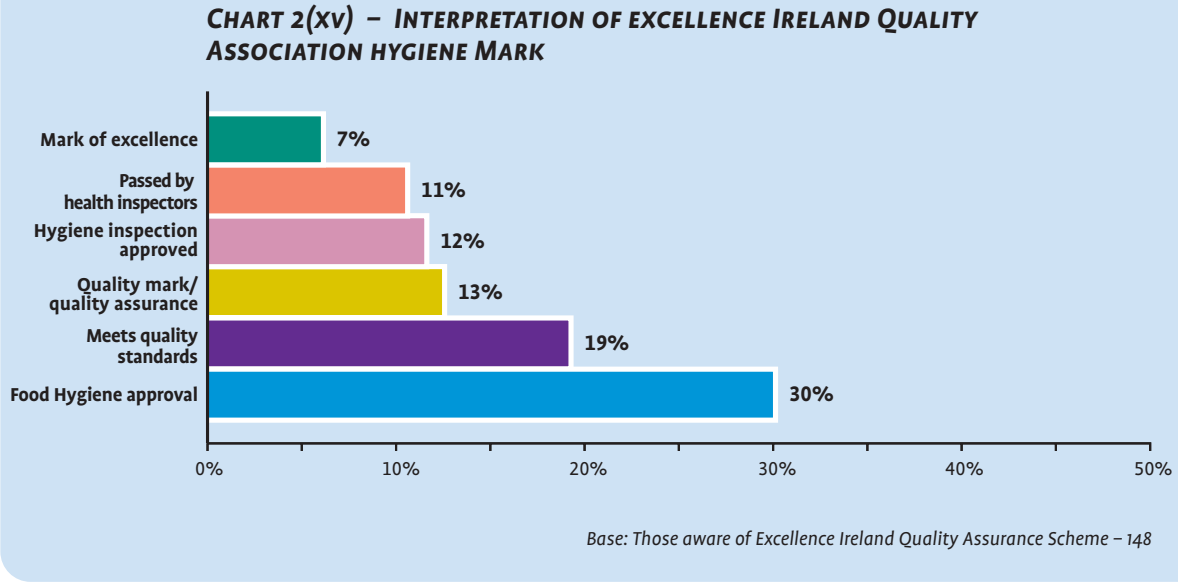
The current low impact of hygiene signs and awards can be partially explained by the limited awareness among the wider population as to what awards exist as well as the falling number of consumers visiting restaurants over the last six months. For example, with the exception of the Q. Mark, respondents struggled to name any hygiene signs/awards in any great numbers. While a minority mentioning standard ones such as HACCP (4%), Excellence Ireland (3%) and Feile Bia (3%) consumers also mentioned more irrelevant and obscure 'signs' such as notices saying 'No smoking' and some mentioned actual culinary awards such as Michelin guide or Egon Ronay Awards.

CHART 2(xiv) – SPONTANEOUS AND PROMPTED SAFETRAK 2 – JAN '04





Those that were aware of the Excellence Ireland Quality Assurance Hygiene Mark were questioned as to what they felt the sign stood for. There appears to be confusion as to whether this hygiene award/sign refers to quality or hygiene approval. While one could argue that high quality and excellence will mean high standards of hygiene, this may not be strictly the case, as outlets with high standards of hygiene may well serve poor quality food.



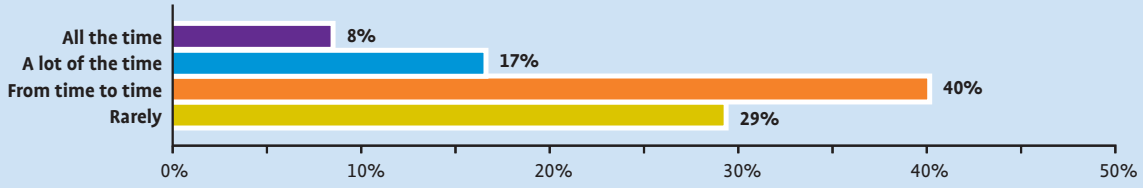
3. Food Labelling and Nutrition

This section investigates how consumers use labelling on food items as well as identifying how aware consumers are about specific nutritional recommendations, specifically the amount of salt, fat and calories people consume in a typical day.

3.1 Food Labelling

It would appear that the majority of consumers do not refer to food labelling on a regular basis. Those that examined food labels all the time/a lot of the time were heavily skewed towards females in the 35-49 year old bracket, from higher socio-economic background and who are responsible for the grocery shopping and cooking in the household i.e. gatekeepers. Conversely, young males between the ages of 15-24 and middle-aged males between 50-64 were least likely to refer to food labels on a regular basis. It could be inferred from these findings that the majority of consumers are happy with the level of knowledge they have about the food products they consume.

CHART 3(i) – HOW OFTEN IRISH CONSUMERS REFER TO FOOD LABELLING

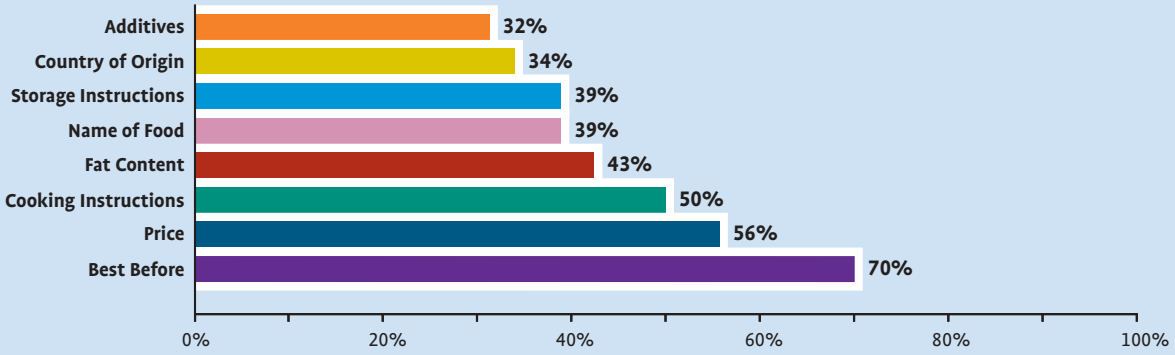


Base: All respondents - 828

Considering that 65% of the population do refer to food labels on a semi-regular basis, it was felt necessary to investigate the main types of information consumers look for from food labels. The vast majority of consumers looked for the 'Best before'/'Use by' date and while slightly skewed towards females, tended to be common across all ages and socio-economic backgrounds. Price was the next piece of information requested, highlighting how many consumers may no longer be as price orientated when purchasing groceries.

Other information, which consumers were aware of included attributes such as additives, quantity of main ingredients, fat and salt content. Whether the produce was organic or GM free etc appear to be secondary to more immediate concerns such as price and cooking instructions.

CHART 3(ii) – INFORMATION CONSUMERS LOOK FOR WHEN REFERRING TO FOOD LABELS

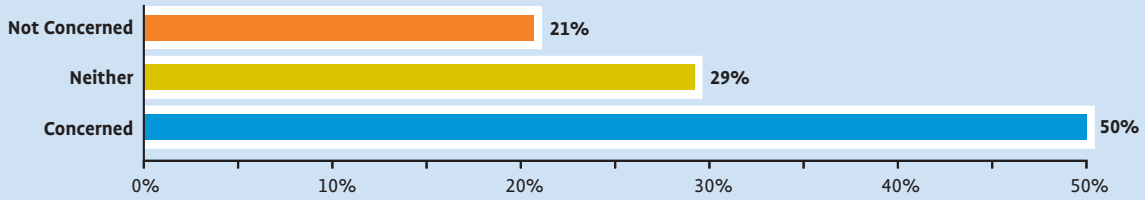


Base: All respondents - 828

3.2 Country of Origin

While only one in three consumers would actively look to see the country their food comes from, one in six would wish to establish whether their food is organic. Those that were concerned about the origins of their food tended to be female and over 50. Interestingly, those from farming backgrounds tended to have higher levels of concern around this issue with more than six in ten stating they were concerned and one in three stating they were very concerned.

CHART 3(iii) – THOSE THAT ARE CONCERNED ABOUT THE ORIGIN OF THEIR FOOD

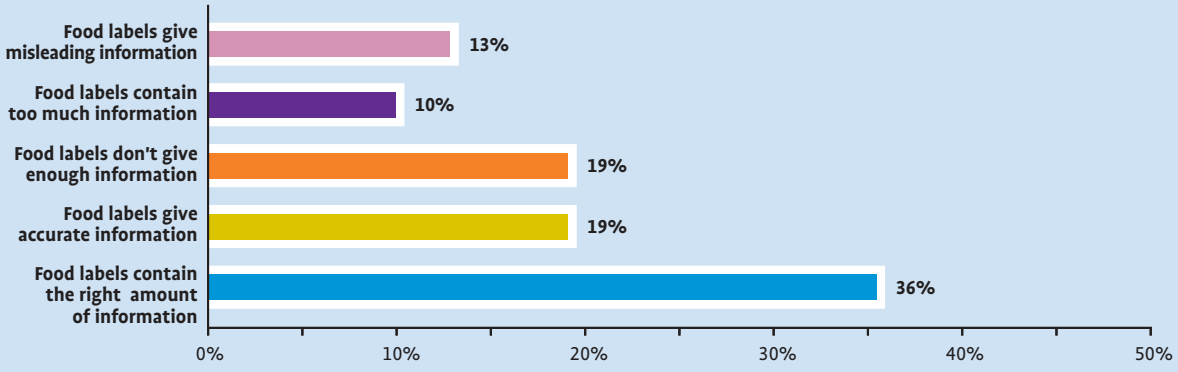


Base: All respondents - 828

3.3 The right amount of information

In general, consumers believe that labelling currently incorporated into food packaging provides them with the correct amount of information they need to make informed decisions. Those who felt that food labels contained the right amount of information tended to be skewed towards males, those that were single and those form lower socio-economic groups. In contrast those that felt that food labels didn't contain enough information tended to be females in the 25-34 year old bracket and from middle class backgrounds. This suggests that an interest in labelling is dependent on an interest in health and diet.

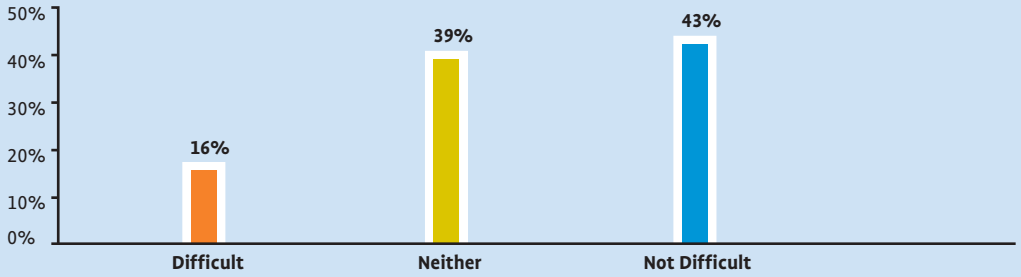
CHART 3(iv) – INFORMATION CONSUMERS LOOK FOR WHEN REFERRING TO FOOD LABELS



Base: All respondents - 828

Most consumers also find food labelling easy to understand, with just one in six finding food labelling difficult to make sense of. Those that had difficulty understanding food labelling tended to be over 65, from working class backgrounds and were not as likely to be as concerned about food safety as those that found food labelling easy to understand. Those that did not find food labelling difficult to understand tended to be under 34 years of age, had a high awareness of ***safefood*** advertising and tended to be the main cook in the household.

CHART 3(v) – THOSE THAT FIND IT DIFFICULT TO UNDERSTAND INFORMATION PROVIDED ON FOOD LABELS

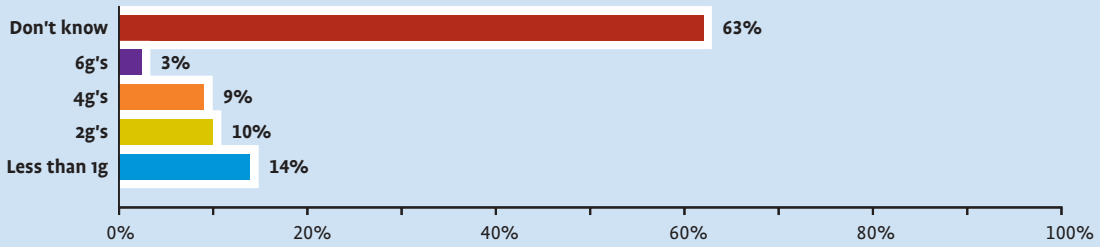


Base: All respondents - 828

3.4 The right amount of salt, fat and calories

While nearly one in three consumers will look at food labelling to find out the amount of salt a product contains, it is interesting to see that very few are were aware of the correct amount of salt they should consume as part of a healthy diet (6g's/one teaspoon per day). While no consumer stated a figure above 6g's, it could be argued that those who answered this question may have been overly cautious in their estimations.

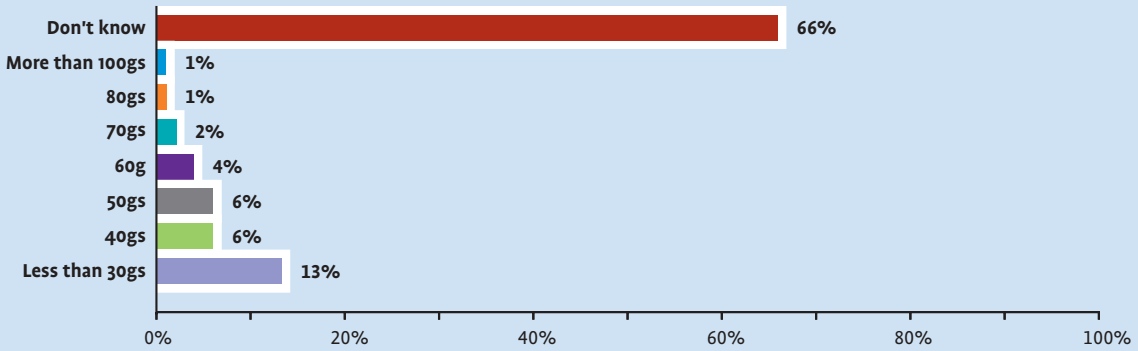
CHART 3(VI) – AMOUNT OF SALT CONSUMERS BELIEVE THEY SHOULD EAT OVER A TYPICAL DAY



Base: All respondents - 828

A similar story exists for the correct amount of fat consumers believe they should eat over a typical day. Considering that 43% of consumers check food labels for fat content, it is surprising that two out of three consumers were unaware of the correct amount of fat they should consumer as part of a balanced diet (70g's for women and 90g's for men). Again, the vast majority erred on the side of caution with only 2% of respondents believing they should eat more the 80'g of fat a day.

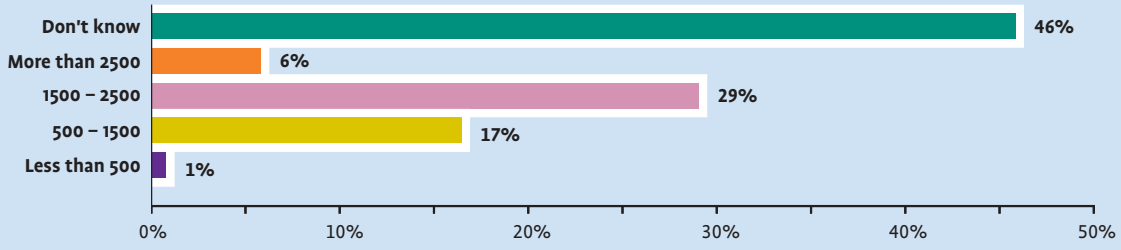
CHART 3(VII) – AMOUNT OF FAT CONSUMERS BELIEVE THEY SHOULD EAT OVER A TYPICAL DAY



Base: All respondents - 828

However, when it came to the number of calories consumers should eat over a typical day, there tended to be a much higher rate of accuracy, with less than half stating they didn't know. One in three consumers correctly identified the 1500-2500 bracket that most men and women should consume in order to be healthy. Not surprisingly, females in the 25-49 year old bracket were most likely to correctly identify the correct amount of calories they should consumer, given the amount of marketing on diet targeted at this segment. Females were also much more likely to underestimate the correct amount of calories they should consume while males were more likely to over-estimate. Those that didn't know the correct amount of calories tended to be male, but there were no other major age or socio-economic differences in this response.

CHART 3(viii) – AMOUNT OF FAT CONSUMERS BELIEVE THEY SHOULD EAT OVER A TYPICAL DAY



Base: All respondents - 828

4. Advertising Awareness and Effectiveness of safefood Advertising

safefood communicates seasonal messages, for example previous summer campaigns have highlighted food safety when Barbequeing or going on picnics, while Christmas campaigns have encouraged consumers to put leftovers in the fridge.

A key objective of this research was to establish the effectiveness of ***safefood's*** advertising. This section examines five different commercials aired during spring and summer time 2004. These ads focused on cooking food thoroughly on BBQ's, storing food properly when on a picnic, keeping your fridge at the right temperature and keeping your fridge clean as well as a direct response initiative promoting a fridge thermometer. Four of these five advertisements appeared in TV format, with three of the five aired on radio and two appearing as outdoor advertising.

As well as exploring how aware consumers in the island of Ireland were of ***safefood*** advertising, this section looks at how effective ***safefood*** advertising was at communicating specific food safety messages. Effectiveness is evaluated both in terms of how it informed consumers and how it influenced claimed behavioural change.

BBQ

Picnic

Fridge Cleaning

Fridge Temperature

4.1 Recalling safefood's Involvement in Advertising at a Spontaneous Level

While many organisations and groups communicate the food safety message as part of their broader activities, ***safefood*** was the organisation that consumers on the island of Ireland were most able to remember advertising the issue of food safety during the past six months.

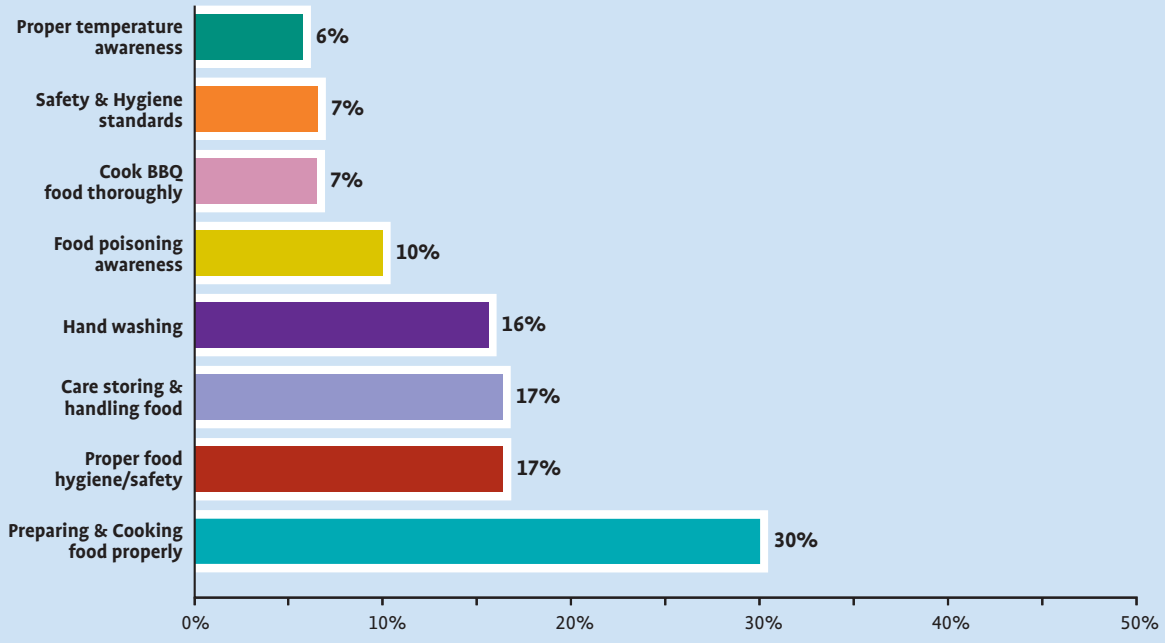
Just under one in four or nearly one million consumers across the Island were able to recall at **a spontaneous level** having **seen** a television commercial for ***safefood***. Recall was most prevalent among females and those under 50 years of age who were most likely to come from middle class backgrounds.

Females again were slightly more likely than males to spontaneously mention ***safefood*** with this also slightly skewed towards those in the 25-49 age group.

4.2 Key Messages of safefood's Campaign

People across the island were asked to recall what they believed to have been the key messages communicated by the advertising that they had seen about food safety in the last six months. The messages people recalled can be found in Chart 4(i).

CHART 4(i) – KEY MESSAGES CONVEYED BY safefood ADVERTISING



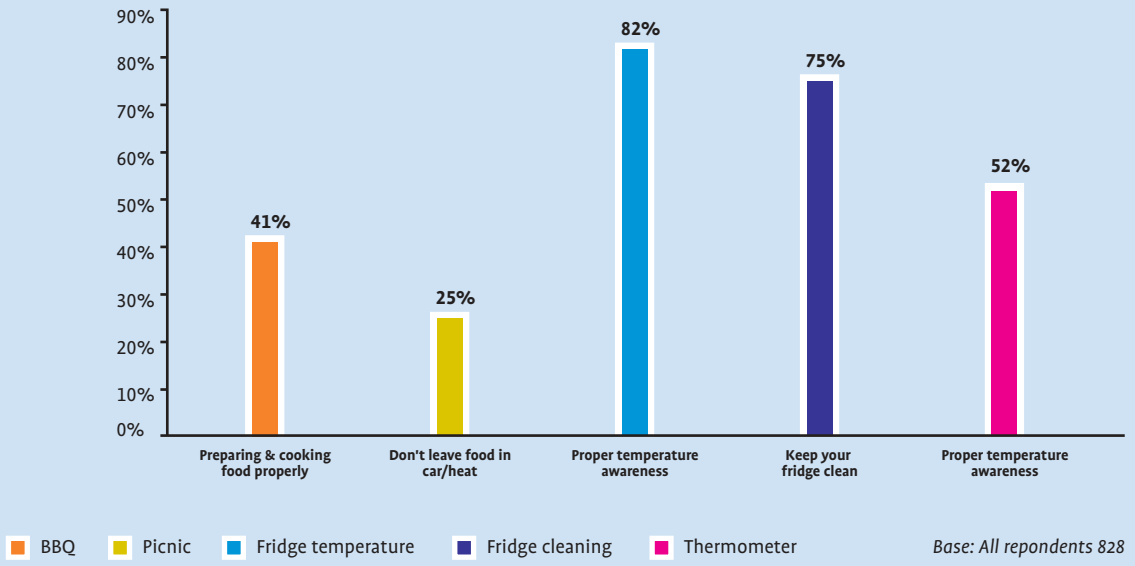
*Base: Those respondents who were able to **spontaneously recall safefood's** advertising - 195*

4.3 Main messages Communicated by safefood Advertising

Chart 4 (ii) illustrates the key message communicated by each of the five ***safefood*** advertisements in question:

Chart 4 (ii) Main Messages Communicated By "BBQ", "Picnic", "Fridge Temperature", Fridge Cleaning" and "Thermometer" Advertisements

Main message communicated by "BBQ", "Picnic", "Fridge Temperature", Fridge Cleaning" and "Thermometer" Advertisements



Base: All respondents 828
BBQ ad Base: All respondents - 475
Picnic ad Base: All respondents – 394
Fridge Temperature ad Base: All respondents -232
Fridge cleaning ad Base: All respondents -195
Thermometer ad Base: All respondents - 104

It is interesting to see that while BBQ and Picnic have the relatively highest level of recall and association with ***safefood***, both commercials are relatively weaker than the others at communicating a singular message. This may be explained by the fact that both BBQ and Picnic have a slightly more layered message to communicate, which is reflected by the strength of some of the other perceived main messages communicated by these commercials, in contrast to the other three commercials under investigation.

It is important to note this research took place immediately after the BBQ picnic advertisements were broadcast and three months after the other three commercials were broadcast.

4.4 Effectiveness of the advertising campaigns

Respondents were presented with a storyboard version of each of the five commercials before then being presented with a series of statements for evaluation purposes. Table 4 (i) summarises the main findings:

Table 4(i) Rating safefood advertising on effectiveness criteria

	BBQ	Picnic	Fr.Temp	Fr.Cleaning	T.meter
Really capturing your interest	64%	64%	55%	51%	49%
Delivering a message of relevance to you	63%	64%	55%	51%	49%
Telling you something you didn't know already	49%	50%	46%	42%	44%
Getting the point across in a clear way	69%	68%	58%	55%	52%
Being hard hitting	64%	62%	54%	52%	50%
Base	828	828	828	828	828

The BBQ advertisements consistently score strongly across all effectiveness criteria as does Picnic and are particularly strong at getting the point across in a clear way, capturing the audience's interest and delivering a relevant message. It may appear that these (the BBQ and Picnic) advertisements score strongly when compared to the others investigated. However the relative scores illustrate the effect of the elapsed time since broadcast. The former advertisement being broadcast in the month preceeding the survey while the latter had aired a full 4 months previously. Such attrition is quite normal with catagories which feature "bursts" of advertising activity. The levels of recognition, awareness, understanding and claimed impact are very satisfactory (Table 4(i) and Table 4(ii)).

The BBQ advertisement had the best "cut through" with those in the 25-49 year old bracket as did the picnic ad, a segment which it could be argued is most likely to have BBQ's and picnics regularly during the summer. It is interesting that effectiveness criteria was consistently scored higher by females than males and by those that could be traditionally classified as housewives/gatekeepers.

It would appear that on the island of Ireland, women still assume responsibility for domestic hygiene, although societal trends and the increasing levels of shared responsibility in the home may change this going forward. In this context, males may need to be put to the fore more often in future advertising as opposed to the "traditional" female representation. The BBQ ad's use of a male may partially explain its ability to score higher across all evaluation criteria as it appeals to a wider audience.

The key message ***safefood*** wanted each commercial to communicate was also evaluated:

Table 4 (ii) Key messages advertising set out to achieve

	BBQ	Picnic	Fr.Temp	Fr.Cleaning	T.meter
Making me cook food thoroughly on the BBQ	64%				
Making me store food properly when going on a picnic		65%			
Making me realise the importance of checking the temperature of my fridge			58%		
Making me realise the importance of cleaning my fridge				55%	
Making you get a fridge thermometer					43%
Base	828	828	828	828	828

4.5 Causing a Change in Consumer Behaviour

Social marketing is a process whereby standard marketing principles are used to influence and change human behaviour on a large scale. The key difference is that society benefits rather than an organisation. Social marketing tools increase participation and retention, and can facilitate health and other behavioural changes.

While one of the goals of ***safefood's*** advertising is to educate and inform the public about the importance of hygiene around food, the overall goal of any advertising campaign is to actually change consumer behaviour in a positive way.

Of those surveyed across the island of Ireland, more than one in five people claim to have already changed their behaviour because of ***safefood's*** advertising, with a further 21% (equivalent to 880,000 consumers) planning to change their behaviour as a result of the campaign for example, washing their hands.

Those who claim to have **already** changed their behaviour because of the commercials are twice as likely to be female as male, are aged between 25-49 and skewed towards those from middle class backgrounds tend to be female and are largely responsible for the grocery shopping. Consumers who **planned** to change their behaviour were as likely to be male as female, with age, social class as well as other criteria playing a neutral role. Like those whom had changed their behaviour, these consumers were much more likely to be aware of ***safe*food** TV and Radio advertising.

Table 4(iii) – Most Likely Actions as a Result of the Advertisements

"It made me think more about food safety and I have *already* changed my behaviour as a result of the ad"	22%
"It made me think more about food safety and I *plan to change* my behaviour as a result of the ad"	21%
"It made me think more about food safety and I *may look into* this issue at some stage"	22%
"It made me think more about food safety but it is *unlikely* I will look into it any further"	15%
Don't know	19%

Base: All respondents - 828

It is clear from the results that those most likely to have **changed** or **plan to change** their behaviour in relation to food safety are much more likely to be those that have responsibility for the food function within their household. While the target segment for such messages is still undoubtedly this group, more attention may need to be given to those who **may** or are **unlikely to change** their behaviour in relation to the issue. On foot of these results ***safe*food** is piloting the use of alternative communication techniques that are more likely to have higher levels of "cut through" with this audience, such as point of sale material, sponsorship or direct marketing.

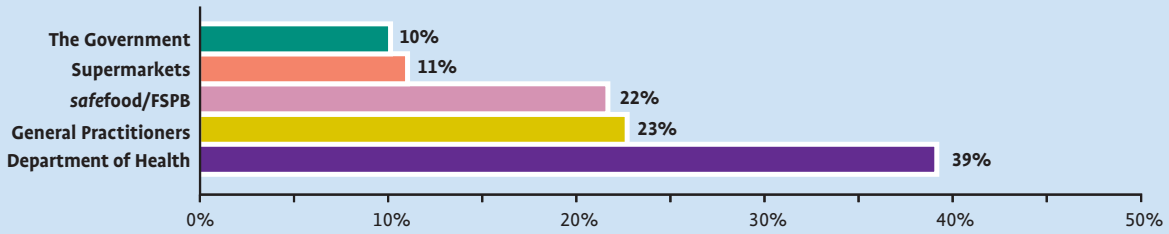
5. Sources of Information and Perceptions of Responsibility

This section deals with the public's perception and identification of key sources of information around food hygiene, food safety and nutrition. It also touches on people's views as to what could be done to improve overall food safety and their level of confidence in current measures being taken.

5.1 Sources of Information on Food Hygiene, Food Safety & Nutrition

Respondents were first asked whom they believed to be a general source of information on health. Unsurprisingly the Department of Health is the organisation the majority of consumers view as the first port of call when searching for information on health, with one in four citing this department. General Practitioner's were next followed by ***safefood***, with over one in five believing the organisation is a good source of information on health issues. While this is a new measure and cannot be benchmarked against previous waves, it is interesting to see that many consumers view ***safefood*** as having a role in their lives outside of their food safety remit.

CHART 5 (i) – GENERAL SOURCES OF INFORMATION ABOUT HEALTH

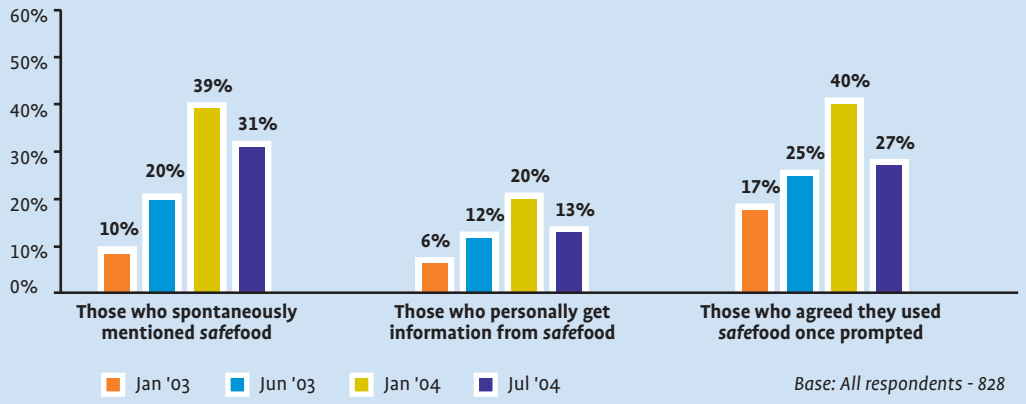


Base: All respondents - 828

Participants were next asked what organisations they would consider to be key sources of information on food hygiene, food safety and nutrition. They were first asked this at a spontaneous level before being asked the same question at a prompted level. They were also asked to identify where they personally source information on food safety and food hygiene.

The Department of Health (26%) and the Government (10%) were identified as key sources of information (at an unprompted level) about food hygiene, safety and nutrition, with ***safefood*** topping the list (31%). In terms of where people actually personally source their information, the media (18%), as expected, is still the main source for most, followed by the Department of Health (16%). Those most likely to mention ***safefood*** at an unprompted level tended to be female, aged between 25 and 49 and had a high level of recall for ***safefood*** advertising.

CHART 5 (ii) – SOURCES OF INFORMATION ON FOOD HYGIENE, FOOD SAFETY & NUTRITION



At a prompted level, ***safefood*** continues to be the main source of information on food safety, hygiene and nutrition, but has dropped slightly since January 2004.

Table 5 (i) Organisations that consumers associate with Food Issues

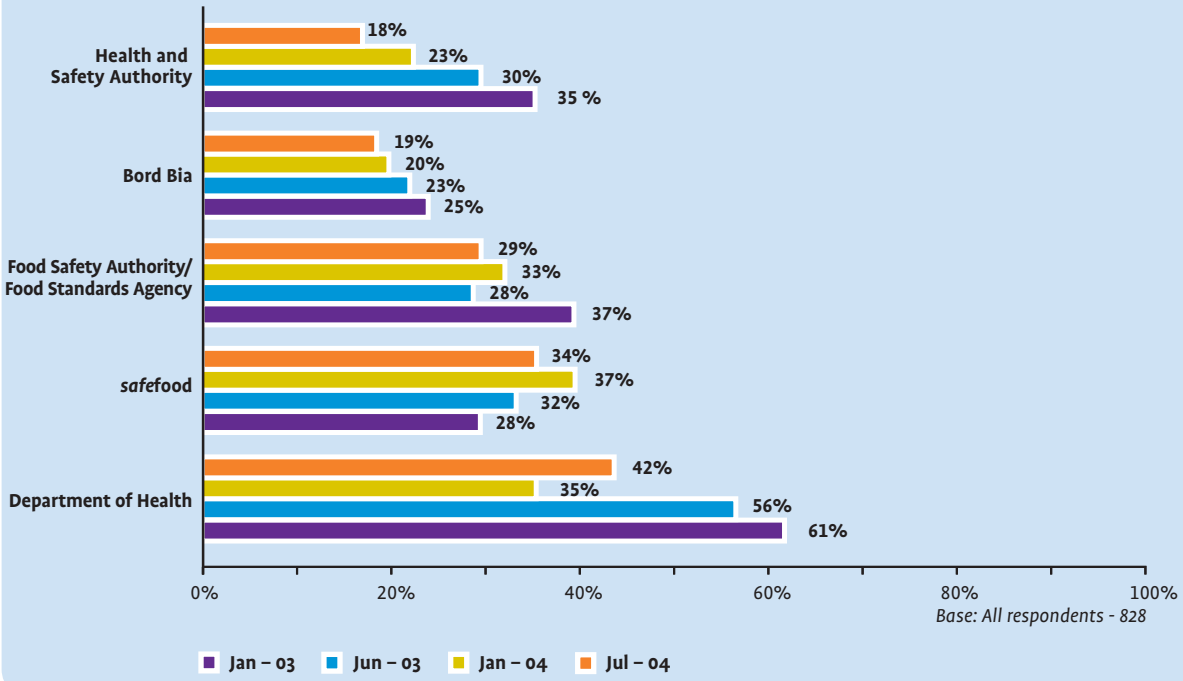
	Jan '04	*Jul '04*
safefood/Food Safety Promotion Board	65%	63%
Dept. of Health/DHSSPS	54%	59%
Bord Bia	47%	49%
Food Standards Authority of Ireland/Food Standards Agency NI	50%	48%
Health and Safety Authority	39%	36%
Consumer Associations	23%	27%
Dept. of Agriculture / Dept. of Agriculture and Rural Dev.	29%	26%

Base: All respondents - 828

safefood continues to be the number one agency consumers associate with food issues across the island. Those citing ***safefood*** tended to be skewed towards females under 50 years of age, with approximately three out four recalling ***safefood*** advertising.

While ***safefood*** was regarded in the previous wave as having responsibility for setting standards for food safety, consumers now perceive this responsibility to be the Department of Health's, which reflects opinions held in the first two waves of safetrak. Those that see the Department of Health as having responsibility for setting standards in Food Safety were skewed towards males, over 50 years of age and from middle class backgrounds. Those who believed ***safefood*** should set standards for food safety, tended to be slightly skewed towards females, with both groups having similar levels of recall of ***safefood*** advertising.

CHART 5 (iii) RESPONSIBILITY FOR SETTING FOOD STANDARDS



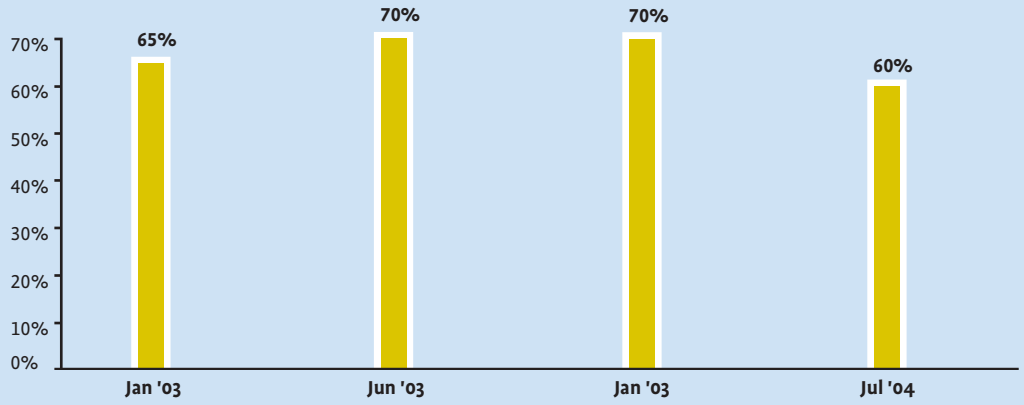
5.2 Level of Confidence in Current Measures being Taken with Regard to Food Safety

Overall, most people are confident about current measures being taken by key organisations involved in protecting their health with regard to food safety.

Confidence levels do not appear to be affected to any great degree by age, gender or class, but those that are confident are much more likely to be concerned about food safety and to recall ***safefood*** advertising, suggesting that those likely to make decisions about food safety are happy with current measures being taken.

It is a very small minority (just 8) who have no confidence in the current measures that are being taken by the relevant organisations. Again this is not specific to any one group.

CHART 5(iv) – THOSE WHO ARE VERY CONFIDENT ABOUT CURRENT MEASURES BEING TAKEN

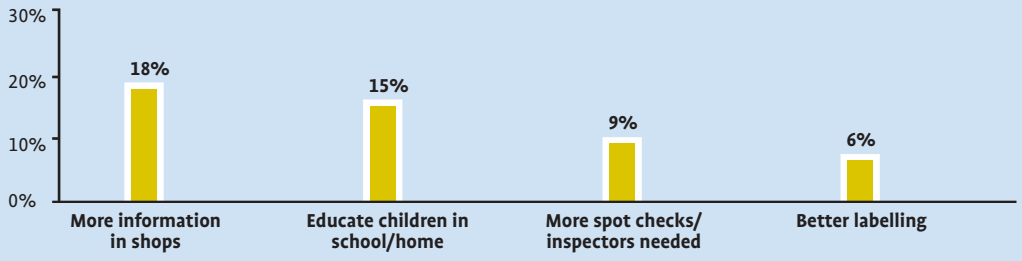


Base: All respondents - 828

5.3 Improving Food Safety

Respondents were asked to put forward their views on what could be done to improve food safety (excluding advertising) on the island of Ireland. Those suggesting more information in shops tended to be over 25 and skewed towards middle class backgrounds, who were more likely to be responsible for the main grocery shop, suggesting that this approach may appeal to slightly more educated consumers. Those in the 15-24 year old bracket were most in favour of educating children in the home or school place, which could be argued is a more effective way of communicating with a segment that tend to be exposed to a huge amount of marketing communication.

CHART 5 (V) – KEY SUGGESTIONS FOR IMPROVING FOOD SAFETY



Base: All respondents - 828

6. The safefood brand

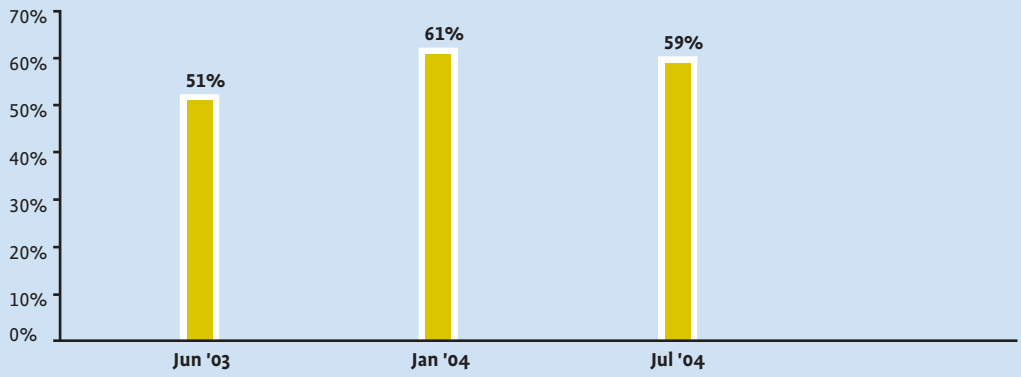
This brief section looks at how recognition of the ***safefood*** brand has evolved over the last eighteen months and how the wider public views ***safefood***. It is perhaps most appropriate to start with general recognition of the ***safefood*** logo before examining in more detail what traits people are attributing to ***safefood***.

6.1 Logo Recognition

Recognition of the ***safefood*** logo remains very high at 59%. Females are much more likely to recognise the logo than their male counterparts (almost seven in ten females compared to just over five in ten males) with those over the age of 65 least likely to recognise the logo (one in two) and those aged 15-24 having the highest level of awareness (almost two in three consumers).

Even those unable to recall any television or radio advertising were able to recognise the logo – albeit to a considerably lesser extent than those who could remember ***safefood's*** advertising.

CHART 6 (i) – THOSE WHO RECOGNISE THE *safefood* LOGO



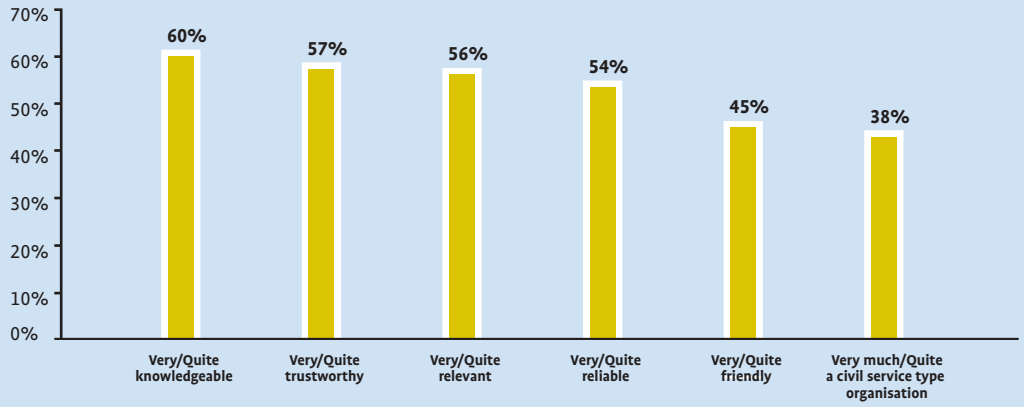
Base: All respondents - 828

6.2 safefood Attributes

Respondents were presented with a list of six attributes and were asked to rate on a scale of 1-5 how they felt the words best described ***safefood*** based on their on their experience of the organisation or in light of the advertisements they would have been exposed to.

safefood consistently scored well across the majority of attributes with most consumers appearing to have a high opinion of the organisation. The majority felt that ***safefood*** was knowledgeable and trustworthy, which tended to be skewed towards females and those that had a high level of recall of ***safefood*** advertising.

CHART 6(ii) – HOW CONSUMERS DESCRIBE *safefood* BASED ON THEIR EXPERIENCE OF THE ORGANISATION OR THROUGH THEIR ADVERTISING

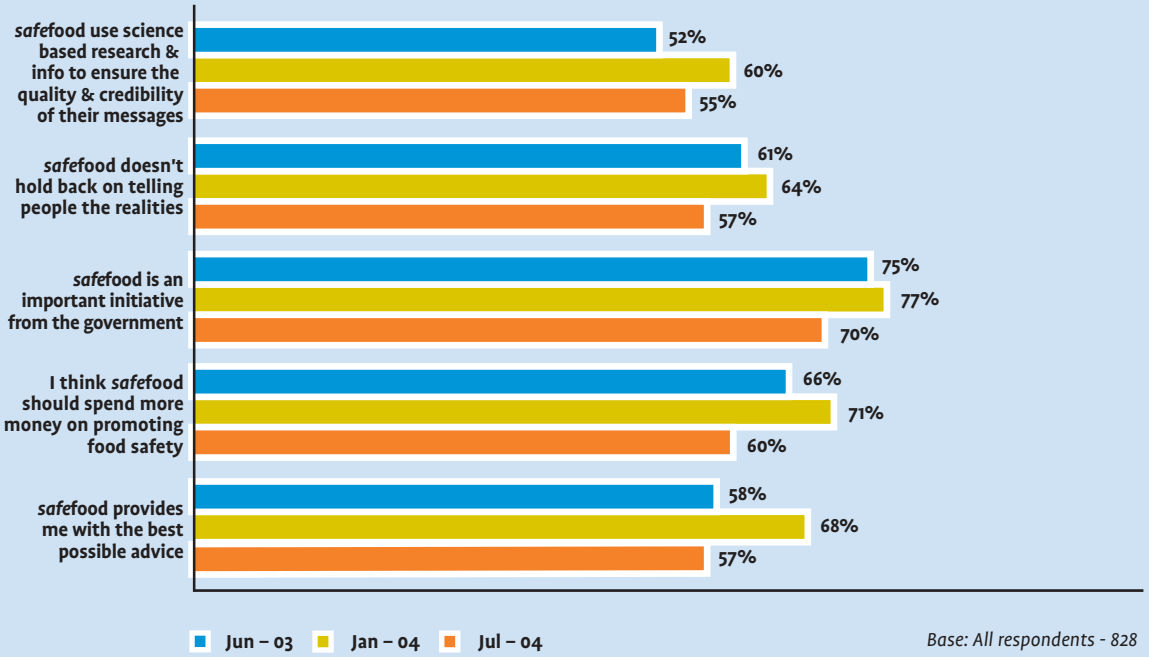


Base: All respondents - 828

6.3 Evaluating *safefood*

Finally, in terms of evaluating ***safefood***, people were generally positive towards the brand, with interest still strong for the type of work that safefood is doing, among middle-aged married females that could be classified as "Gatekeepers".

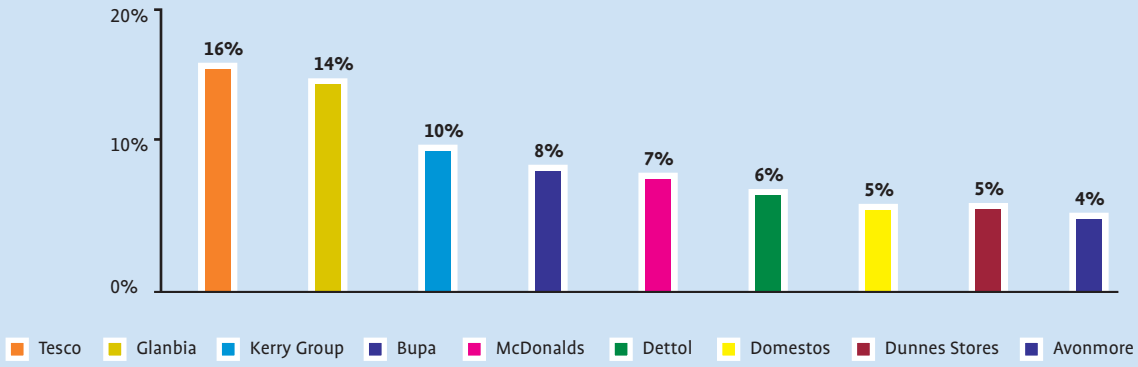
CHART 6 (iii) – THOSE WHO AGREE WITH STATEMENTS ABOUT *safefood*



Base: All respondents - 828

Finally, looking towards the future marketing communications activities, six in ten consumers believe it would be a good idea for ***safefood*** to work with a private company to promote the food safety message, with companies such as Tesco, Glanbia and Kerry Group suggested as potential partners.

CHART 6(iv) – POTENTIAL PRIVATE INDUSTRY safefood COULD PARTNER TO COMMUNICATE FOOD SAFETY MESSAGE



Base: All respondents - 828

7. Conclusion

The research clearly demonstrates that since early 2003 attitudes towards food safety and food hygiene have changed. ***safefood*** has been key in bringing about this change with those who are most likely to be concerned about food safety more likely to readily recall ***safefood's*** advertising either at a prompted or unprompted level.

In terms of the advertising itself, it is clear that it is working very effectively with nearly seven in ten consumers across the island of Ireland aware of at least one ***safefood*** ad, particularly amongst those that can be defined as "gatekeepers". Furthermore, those that can recall the advertising can also accurately articulate the intended message such as "cooking food thoroughly on the BBQ" and "not leaving food exposed to heat when on a picnic. In this vein it is also clear that the advertisements have succeeded in being hard hitting, delivering messages of relevance, getting the point across in a clear way and capturing respondents' interest, all of which are important in terms of causing a change in behaviour.

Those that have already changed their behaviour as a result of ***safefood's*** advertising are most likely to be female and responsible for the grocery shopping. Hence, the key challenge for ***safefood*** is to cause an actual change in behaviour beyond this key group.

The research strongly demonstrates that ***safefood*** as a brand is well recognised and it is increasingly viewed as the organisation with responsibility for promoting food safety and as being a reliable source of information in such matters. In this regard, ***safefood*** has made significant strides since January 2003 – at that time just one in ten spontaneously mentioned ***safefood*** as being a key source of information on food hygiene, food safety and nutrition with the figure having risen to three in ten in July 2004.

In terms of examining ***safefood's*** "brand essence" preliminary findings would seem to indicate that the organisation is one that is regarded as being 'trustworthy' and 'knowledgeable'. There is a clear message emerging from this piece of research that not only is ***safefood*** well regarded by the public but the presence of a body promoting food safety and hygiene is a timely and welcome initiative. Future partnerships with the private sector may help communicate the food safety message even better, particularly in segments where awareness of food safety can be improved.

safetrak 3

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