safetrak 4

Consumer Tracking Research

May 2005

safefood

Contents

Executive Summary

Introduction

Since 1999, ***safefood*** has had as its primary objective to protect and improve public health by fostering and maintaining confidence in the supply of food on the island of Ireland, both on its own and in partnership with other bodies or organisations. A key element in its strategy to foster and maintain confidence has been the development of a comprehensive communications programme around the message of food safety, targeted at consumers. This programme is unique in that it covers all consumers across the island of Ireland, differentiating messages and media as required by target group and region.

In order to evaluate the effectiveness of this communications programme, a tracking research programme has been developed. This safetrack research programme enables ***safefood*** to both evaluate the effectiveness of its advertising on an on-going basis and to provide it with useful feedback regarding consumers' attitudes and behaviour towards food safety, hygiene and nutrition.

The research has also been designed as well to inform planning for subsequent communications activities, covering key themes such as:

- Consumers' attitudes towards food safety and food hygiene, both inside and outside the home, as well as their behaviour in relation to food preparation and consumption;
- Levels of awareness and effectiveness of ***safefood's*** advertising campaigns across different media;
- Consumers' awareness of and interaction with certain foods that are high in salt, fat and sugar (and subject to messaging as part of different campaigns);
- People's experiences of the key sources of information about food safety and their perceptions of the respective responsibilities of different sources;
- Finally, consumers' views on the actual ***safefood*** brand.

The safetrack research programme has been running since January 2003, and since then there have been four subsequent "waves" of research (June 2003, January 2004, July 2004 and January 2005). This longitudinal research programme has made it possible to evaluate changes in both the behaviour and attitudes of the Irish consumer along with monitoring the effectiveness of various aspects of ***safefood's*** communications' activities; revising the latter in light of the research findings.

1. General food & health concerns

Nearly three quarters of consumers across the island of Ireland are concerned about food safety issues in general, with those who can recall ***safefood's*** advertising more likely to be concerned than those who cannot. This figure has consistently increased across the tracking since the first benchmark research. Food poisoning would appear to be the number one concern consumers have in relation to current food issues and continues to be one of the key issues they would like to find out more about.

2. Food preparation, attitudes towards safe eating, and quality assurance

This section first sets out to establish how involved consumers are in the cooking process 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. However, it is interesting to see that there has been a slight decrease in those who say they share responsibility for cooking, and an increase in those who would say they only "occasionally" cook. This could be driven by a number of factors, including the growing number of consumers eating outside the home and/or relying on ready meals. It could be argued that cooking will increasingly become a leisure activity as opposed to a household chore, as time constraints would appear to be increasing for most consumers across the island.

Looking specifically at the production, preparation and consumption of chicken, food poisoning (and in particular *Salmonella*) appears to feature heavily as a concern for consumers – mentioned by 12% when asked without prompting to identify a concern in this area. In addition, 17% of consumers mentioned a concern about preparing and cooking chicken properly which is essential in preventing food poisoning.

While many consumers are eating out more, awareness of quality assurance signs / awards would appear to be low, with more than half of consumers unaware of such awards even when prompted. It is therefore not surprising that fewer than three in ten consumers believe that such signs / awards influence their decision-making.

3. Nutrition

This section explores how consumers on the island of Ireland consume salt and their awareness of the likely effects on health of a diet high in salt. In general, consumers would appear to have low awareness levels regarding the correct amount of salt they should consume as part of a healthy diet, with more than four in ten unable to hazard a guess. This is not surprising given that nearly half of consumers judge the salt content of their food by taste alone. However, almost nine in ten consumers were aware that a diet high in salt is bad for their health. Awareness of the implications of such a diet tended to be quite high at an unprompted level, with 48% citing high blood pressure and 48% citing risk of heart disease.

4. Advertising awareness and effectiveness of safefood advertising

Nearly one in three, or the equivalent of 1.2 million consumers across the island were able to recall at a spontaneous level having seen a television commercial for ***safefood*** in the last six months. This represents the highest ever spontaneous recall for any of ***safefood's*** advertisements to date.

Television was the most effective medium when compared to radio advertising or promotional literature, with just under eight in ten consumers across the island recalling a ***safefood*** TV ad at a prompted level. Again, this is the highest level of recall since the tracking research commenced in January 2003. Of all ***safefood's*** advertising, the Christmas TV ad would appear to have been most effective, in terms of consumers associating it with ***safefood*** and its ability to communicate the message in a clear and engaging way.

In more general terms, the advertising campaign was successful in making consumers on the island of Ireland think more about food safety, with over one in four claiming they changed their behaviour as a result and a further one in five planning to change their behaviour in the near future as a result. Interestingly, those who stated that they will not look into the issue any further has also risen by 5%, suggesting that a natural position has evolved whereby those with the inclination to change behaviour will do so and those who do not have the desire to change their behaviour are unlikely to be motivated by this particular campaign.

5. Sources of Information and perceptions of responsibility

While many organisations and groups communicate the food safety message as part of their broader activities, ***safefood*** is the organisation that consumers on the island of Ireland believe is best at getting them to think more seriously about food safety, with 16% citing the organisation at an unprompted level. This figure has increased since June 2004, when ***safefood*** was overtaken by the Department of Health (ROI), due to the high profile received by the Department during the introduction of the smoking ban.

Just under one in three people spontaneously identified ***safefood*** as being the organisation 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 May 2003. However, the number of consumers who personally get information on food hygiene, standards and safety from ***safefood*** has increased by 4% since June 2004, to just under one in six.

safefood continues to be the organisation consumers associate most with food issues, with just under one in seven consumers surveyed citing ***safefood***. In tandem with this, almost two thirds of consumers across the island are very confident about the current measures being taken by public bodies with regard to food safety, up 5% since June 2004, but still lower than this time last year.

6. The safefood brand

Recognition of the ***safefood*** brand is at its highest since research began on this topic back in May 2003, with almost three quarters of consumers on the island recognising the ***safefood*** logo.

Based on their experience of the organisation or because of exposure to its advertising, nearly two thirds of consumers view ***safefood*** as being a very relevant, reliable and knowledgeable organisation, significantly higher than in June 2004. These sentiments are supported by the growing number of consumers north and south who strongly agree that ***safefood*** is an important initiative by the government (72%) and that ***safefood*** will always act in their best interests (67%).

Conclusion

safefood has become a highly respected and credible source of information for consumers on the island of Ireland regarding food safety, standards and hygiene. The results of this latest wave of research highlights that ***safefood*** is currently enjoying one of the most successful times in its history, with awareness of ***safefood*** advertising and brand at its highest level since the research began. 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 been exposed.

However, it is likely that a plateau has been reached in terms of ***safefood's*** ability to continue to be able to influence behaviour towards food safety and hygiene through its current food hygiene campaign featuring pixillated faces. This is most evident in the polarisation of those consumers who are likely and unlikely to change their behaviour towards food safety and hygiene, with both segments growing during the last six months.

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 including 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 in the future, 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 January 2005 and where appropriate to show how these compare to both the benchmark study and subsequent research conducted in June 2003, January 2004 and July 2004.

Methodology

Eight-hundred and nineteen face-to-face interviews were conducted throughout the island of Ireland over a three-week period in January 2005. 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.

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 were arrived at by examining the most recent statistics published by the census offices. Field interviewers were 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 was 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 million 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.

Table (a) - Methodology Summary

Number of interviews	Benchmark Study (January 2003)	Safetrak 1 (June 2003)	Safetrak 2 (January 2004)	Safetrak 3 (July 2004)	Safetrak 4 (July 2005)
Island of Ireland	900	827	828	819	819
ROI	600	510	510	502	502
NI	300	317	318	317	317
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 – Food preparation and quality assurance

This section investigates how many consumers are responsible for cooking in their homes. Complementing this is a more in-depth investigation of the concerns consumers have regarding chicken and dairy production, preparation and consumption. It also explores how aware consumers are of the various quality assurance signs and symbols promoted on the island. Finally, the seasonal issue of Christmas turkey is investigated and identifies consumers' awareness of the correct method to cooking turkey.

Section 3 – Nutrition

Section 3 explores whether consumers are aware of the correct amount of salt they should consume daily, before identifying how consumers use salt to season their food. The awareness consumers have of foods high in salt is investigated next, as well as the most effective means to reduce the salt content in their diets. Finally, the likely effect of a diet high in salt is probed at both prompted and unprompted level.

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 investigates alternative methods of promoting the food safety message (besides advertising) as well as consumer 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 views ***safefood*** as an organisation.

Section 7 – Key conclusions

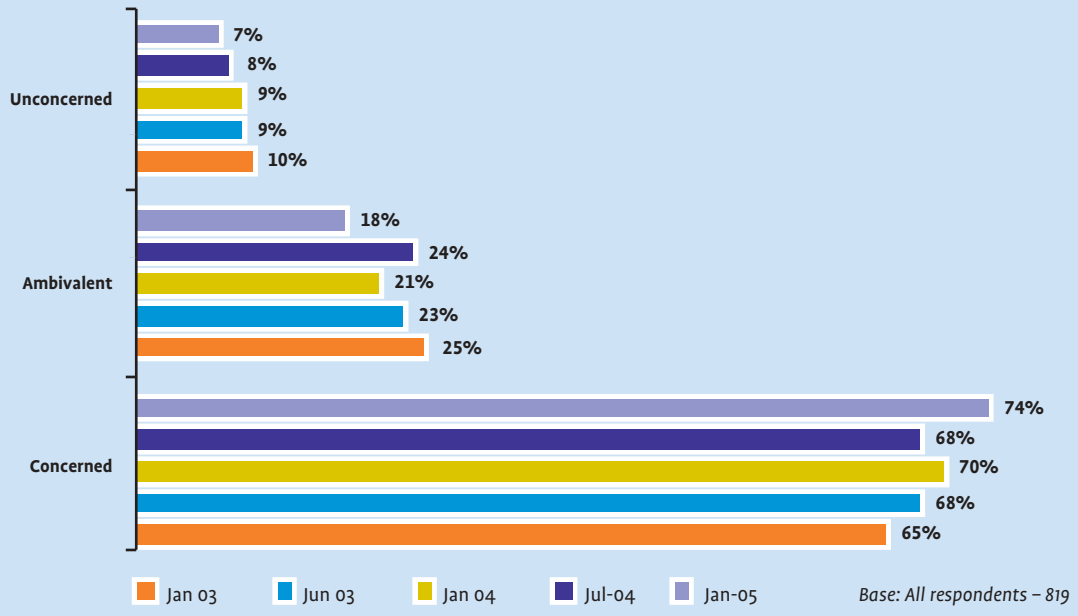
1. General food and health concerns

This section focuses on consumers' 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 included in safetrak 4 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.

General food safety concerns

Almost three-quarters (74%) of adults express some concern about food safety issues, with just under a third (32%) saying they are very concerned. A core group of 'gate-keepers' (i.e. primarily female main grocery shoppers) are significantly more likely to express concern over food safety, not surprisingly, as these are the individuals who are also most likely to have responsibility for food preparation. Higher social classes (ABC1s) are also significantly more likely to be concerned about food safety.

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

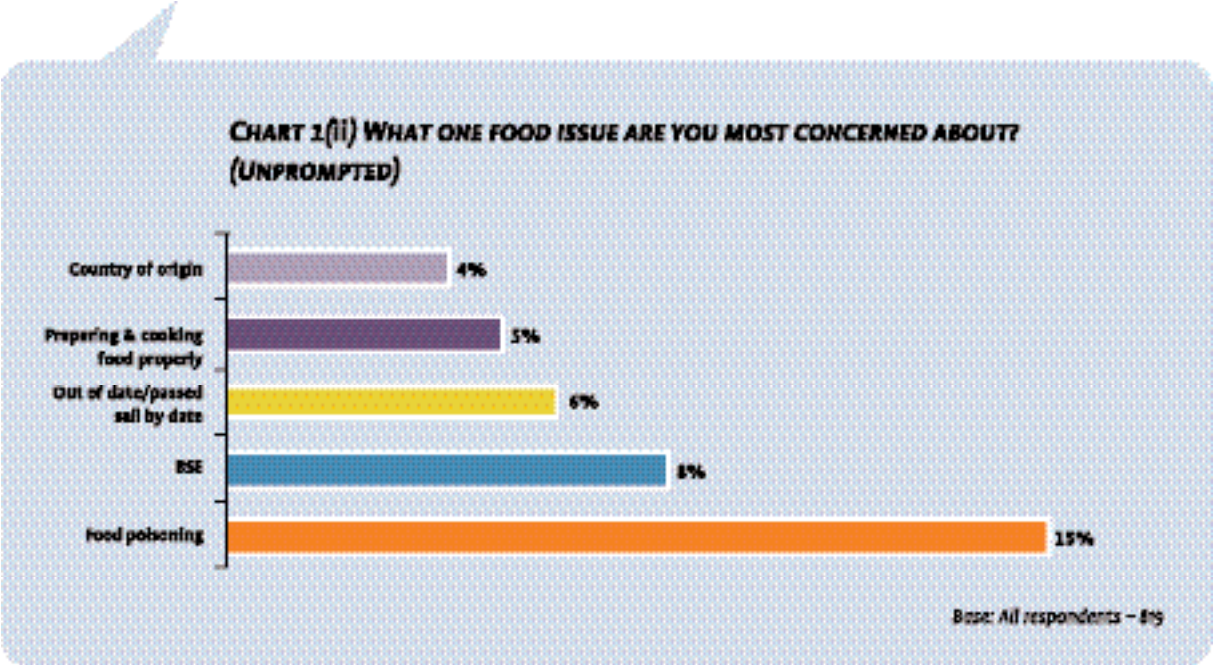


There would appear to be a significant increase in the proportion of the population expressing concern about food safety since this research was first conducted in January 2003. Conversely, ambivalence with regards to such concern has declined in the past two years, pointing to a gradual shift in attitudes to food safety.

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

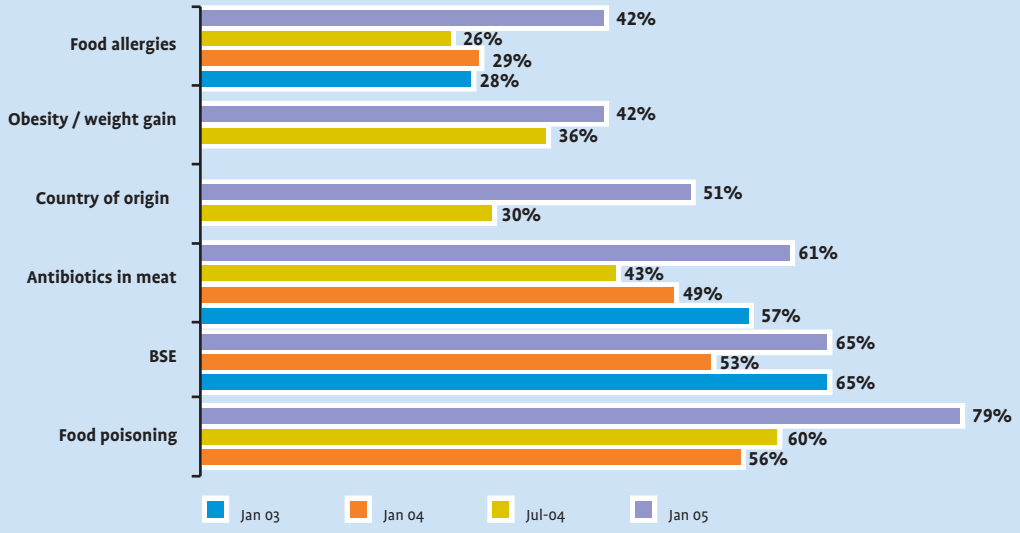
Specific food concerns

Asked to identify, without prompting, the food safety issue that they are most concerned about, the most immediate concern of consumers on the island of Ireland would appear to be food poisoning, mentioned by 15%. BSE continues to hold a place in public consciousness, mentioned as a concern by 8%.

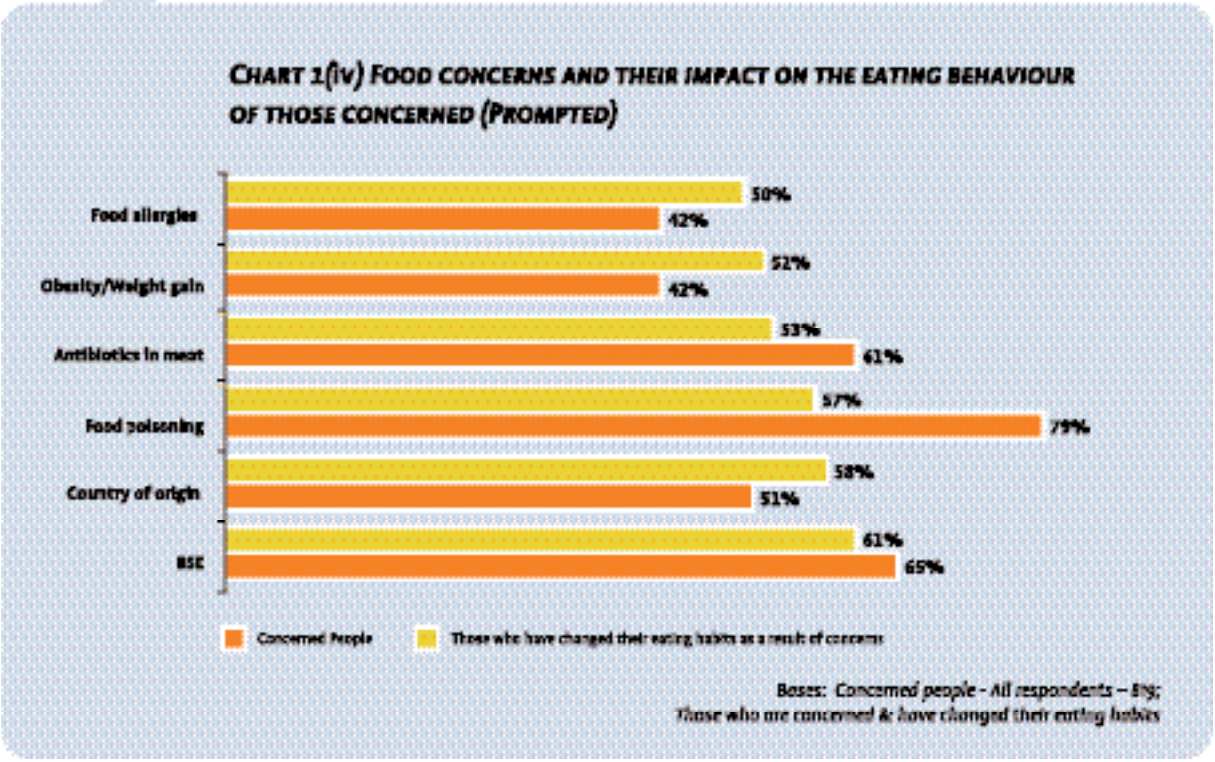


Offered a list of six potential issues which might cause concern, almost eight in ten consumers (79%) said that they would be concerned about food poisoning, while almost two-thirds expressed concern about BSE and the use of antibiotics in meat. There has been a significant increase in concern about these issues, with BSE and the use of antibiotics returning to the levels recorded January in 2003. Concern with country of origin, obesity/weight gain and food allergies has also increased. This is most likely aided by a continuous and growing media interest in such topics, with ABC1s and 'gate-keepers' being more likely to express concern about these issues.

CHART 1(iii) OTHER FOOD ISSUE CONCERNS (PROMPTED)



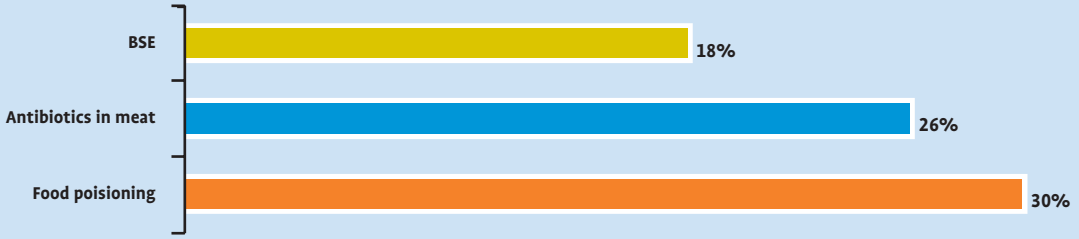
While levels of concern regarding these food fears have increased substantially in recent times, more than half of those concerned with each issue have changed their eating habits accordingly. This illustrates the seriousness with which consumers treat messages about food safety, especially females and ABC1s who are more likely to state that their eating habits have been affected by concerns about food safety issues.



The willingness to change eating behaviour in light of the high levels of concern about food poisoning is supported by a need for more information about this issue, as expressed by three in ten consumers. Food poisoning is possibly one area of food safety where the consumer can take some amount of responsibility, supported by the willingness of consumers to learn more about the issue.

While consumers have shown a willingness to change their food handling habits to reflect concerns about all issues of food safety, it is interesting that the three main issues consumers would like to find out more about include two over which they have very little direct control, i.e. antibiotics in meat and BSE. While consumers may not be able to eliminate these concerns by changing the way they prepare food, consumers would seem to prefer to have information that could help them make informed choices.

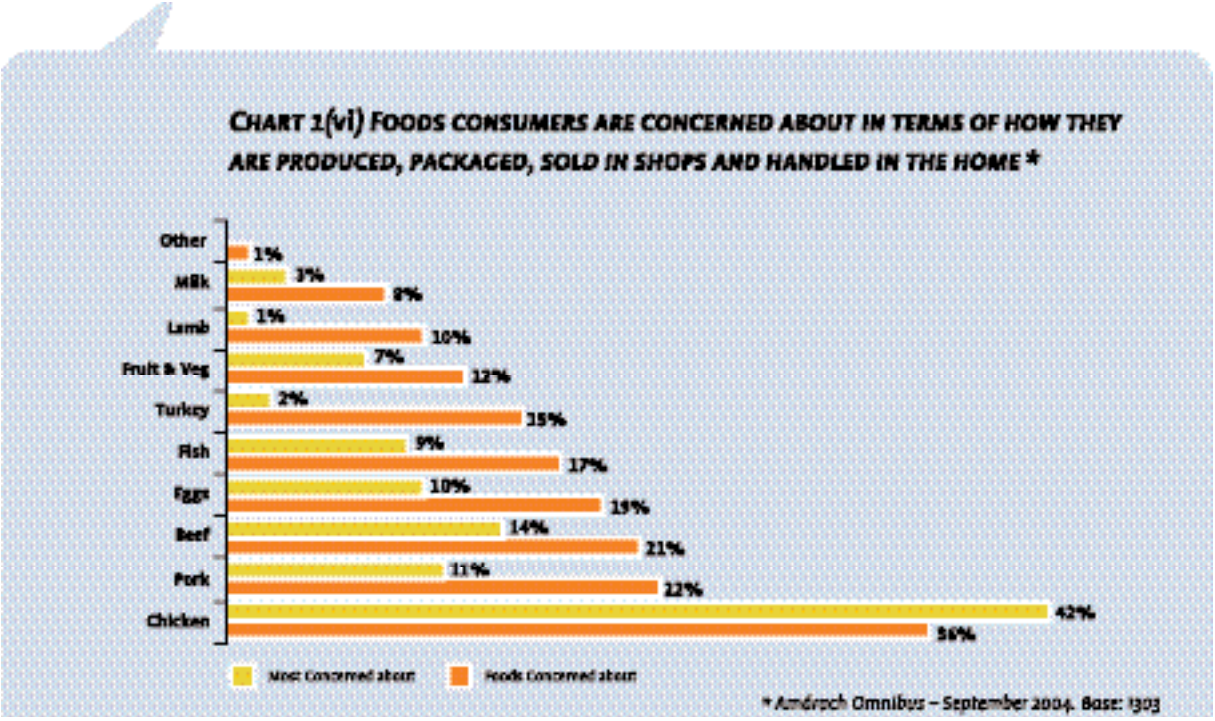
CHART 1(V) THOSE WHO WOULD LIKE TO KNOW MORE ABOUT THE FOLLOWING FOOD ISSUES - TOP 3



Base: All respondents – 819

Concerns around certain foods

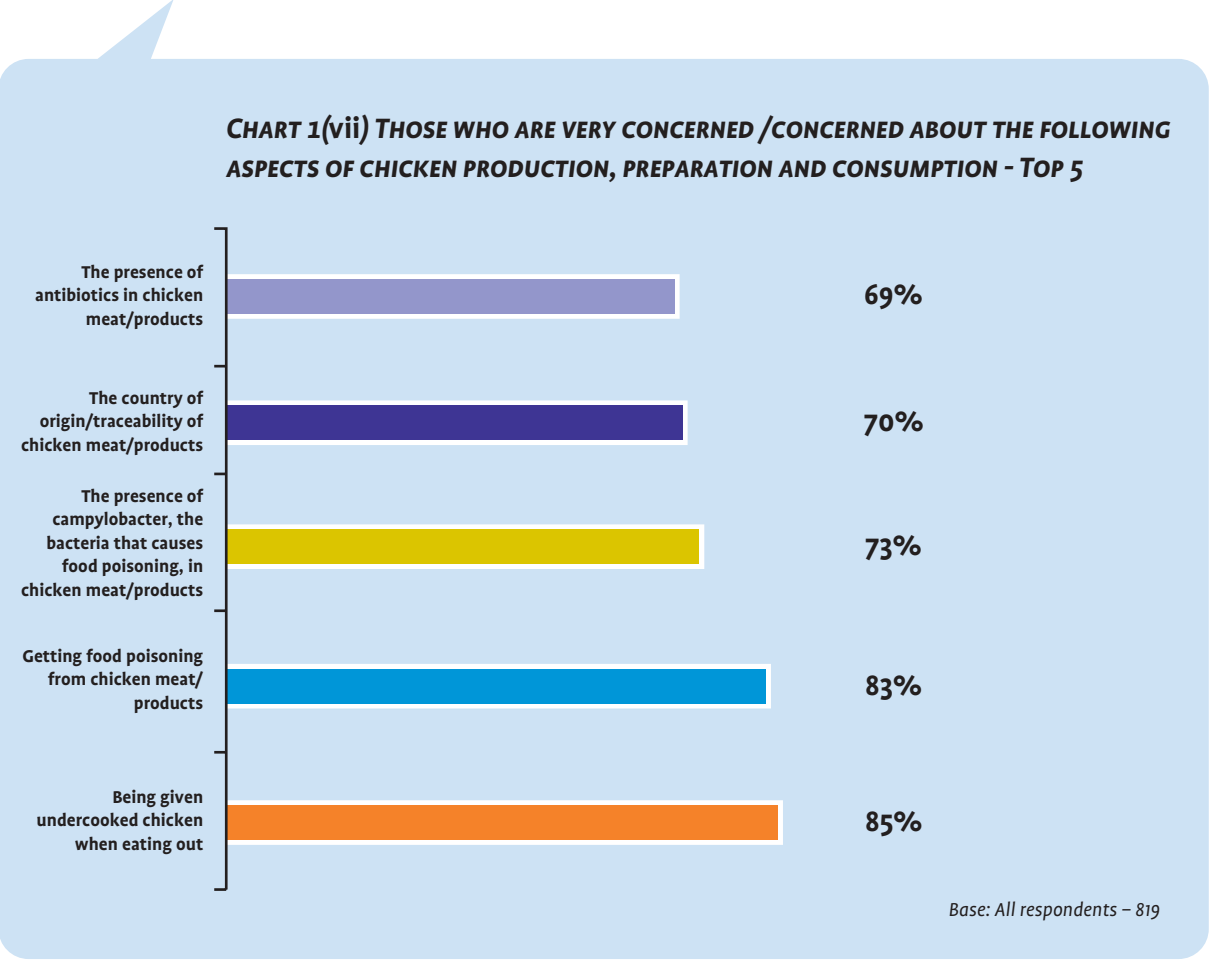
safefood commissioned additional research in September 2004 to identify the foods consumers were concerned about, in terms of how they were produced, packaged, sold in shops or handled in the home. Almost 60% had concerns in relation to the food they consumed, highlighting how consumers tend to be more concerned about the actual food itself than the premises in which it is prepared. Chicken would appear to be the food consumers are most concerned about, followed by pork, beef, eggs and fish, perhaps predictably given the food scares these commodities have suffered in the last five years e.g. Avian Flu, *Salmonella*, BSE, Foot and Mouth etc.



Key concerns around chicken production, preparation & consumption

Looking specifically at the area of chicken production, preparation and consumption, food poisoning (and in particular *Salmonella*) appears to feature heavily as a concern for consumers – mentioned by 12% when asked without prompting to identify a concern in this area. In addition to this, 17% of consumers mentioned a concern about preparing and cooking chicken properly which is essential in preventing food poisoning.

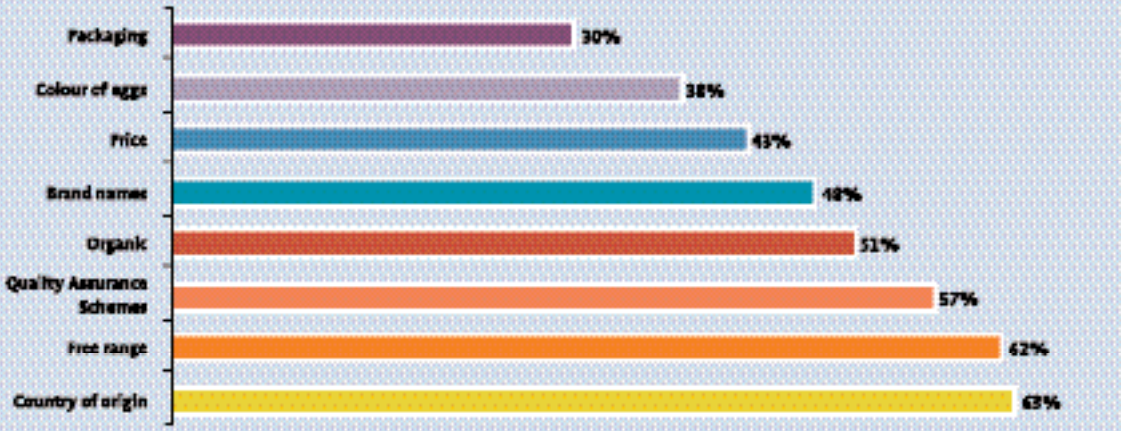
Consumers were given a list of nine possible issues regarding chicken production, preparation and hygiene and were asked to indicate the extent to which they are concerned about each. Nearly nine in ten consumers across the island of Ireland were concerned about being given undercooked chicken when eating out, with over eight in ten concerned about getting food poisoning from chicken products. The presence of *Campylobacter* – a cause of food poisoning – in chicken products also rated highly, with 73% expressing concern.



Not surprisingly, the 'gatekeepers' are more likely to express concern about all issues surrounding chicken production, preparation and consumption. Those who recall ***safefood's*** advertising and promotional material are also more likely to express concern.

Given the lower levels of concern about the rearing and origins of poultry (these factors scored considerably lower than food poisoning and food preparation as concerns), it is interesting that country of origin is deemed by more than half of consumers to be of more relevance in assessing the safety of chicken products. Quality assurance schemes also hold a high level of importance in this respect. Generally speaking, gatekeepers and those from an ABC1 background are more likely to have confidence in these measures – most likely because it is these consumers who are most concerned about food safety and who consequently are likely to know more about measures to ensure it.

CHART 1(viii) EFFECTIVENESS OF VEHICLES FOR ENSURING THE SAFETY OF POULTRY PRODUCTS (PROMPTED)

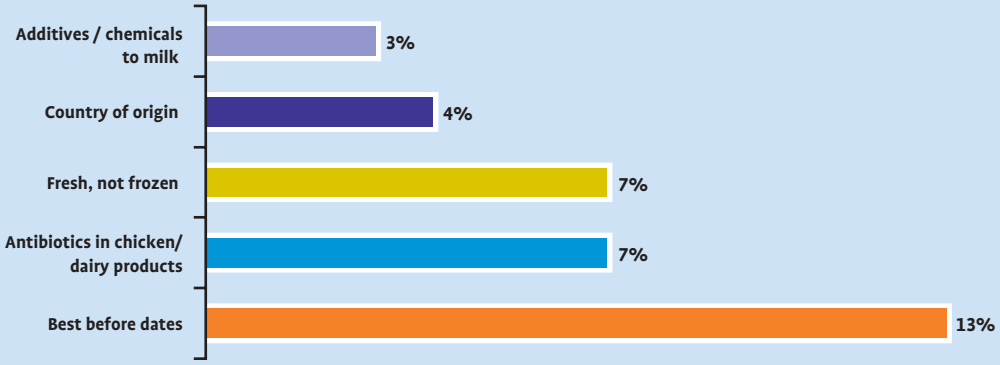


Base: All respondents – 819

Key concerns around dairy production, preparation & consumption

Asked without prompting to identify areas of concern in terms of dairy production, preparation and consumption, the most prevalent concern mentioned by consumers related to 'best before dates' and out-of-date food (mentioned by 13%). The use of antibiotics, guaranteeing that the produce is fresh and not frozen, country of origin and the addition of chemicals were also mentioned by a number of consumers.

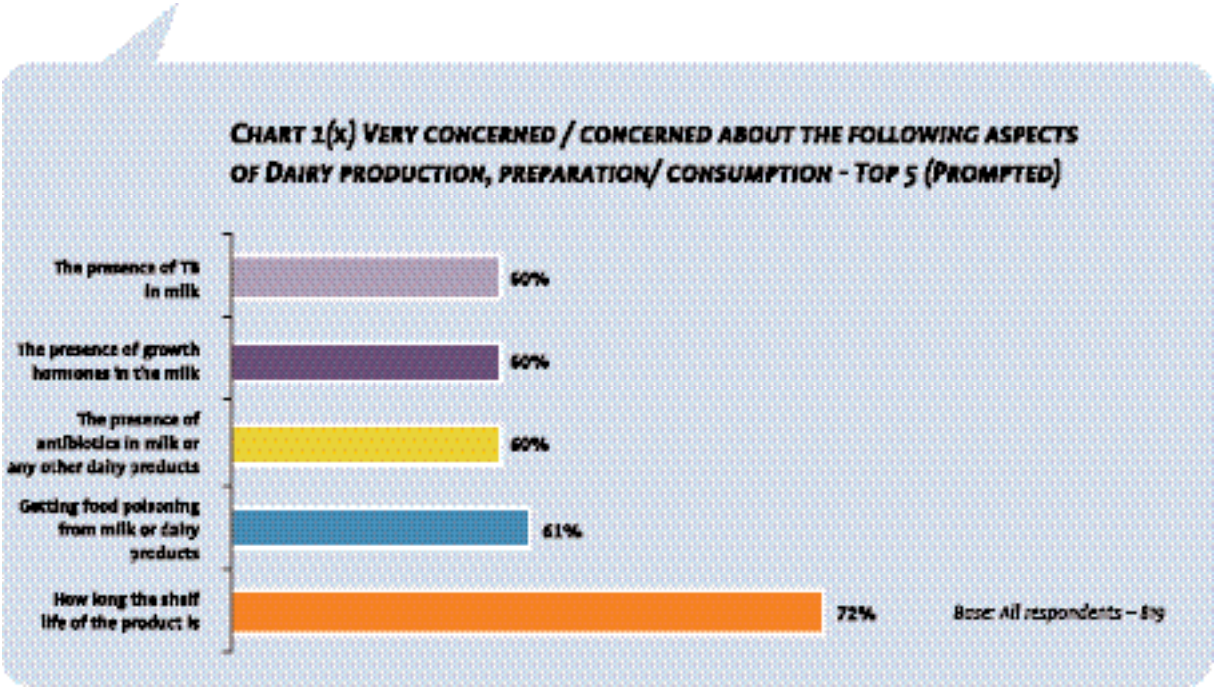
CHART 1(ix) KEY CONCERNS AROUND DAIRY PRODUCTION, PREPARATION AND CONSUMPTION - TOP 5 (UNPROMPTED)



Base: All respondents – 819

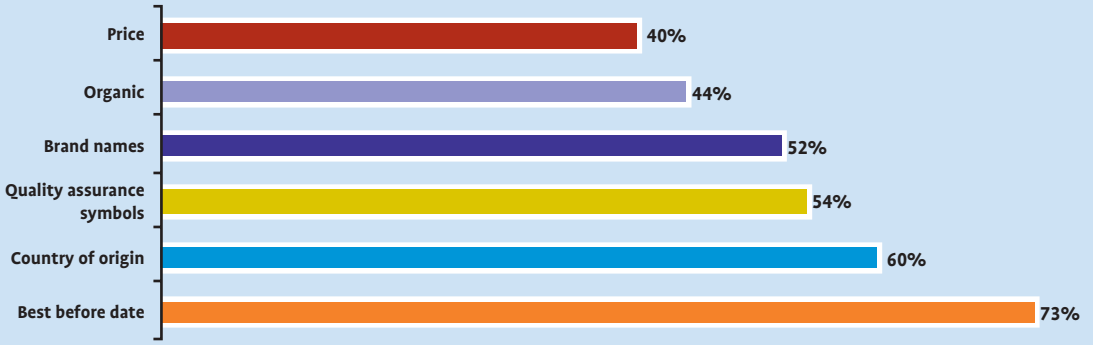
When asked to rate their level of concern about 12 different issues regarding the production and preparation of dairy products, more than seven in ten consumers said that they were concerned with 'how long the shelf life of the product is', reflecting the spontaneous mention of 'best before dates', cited at an unprompted level. Six in ten consumers claimed to be concerned with getting food poisoning from dairy products, the presence of antibiotics or growth hormones in milk and the presence of TB in milk.

Again, it is the 'gatekeeper' group who seem to be most concerned about all aspects of the safety of dairy produce, reflecting their general concern about all things food safety-related. Supporting this is the finding that those who recalled ***safe*food's** advertising are more likely to be concerned about the safety of dairy produce.



Given the high levels of concern about dairy produce being out-of-date, it is not surprising that the most effective means of ensuring the safety of dairy products was deemed by consumers to be 'best before dates'. Again, it is gatekeepers and those who are aware of ***safefood's*** advertising and promotional material who are more likely to assign importance to all of these measures.

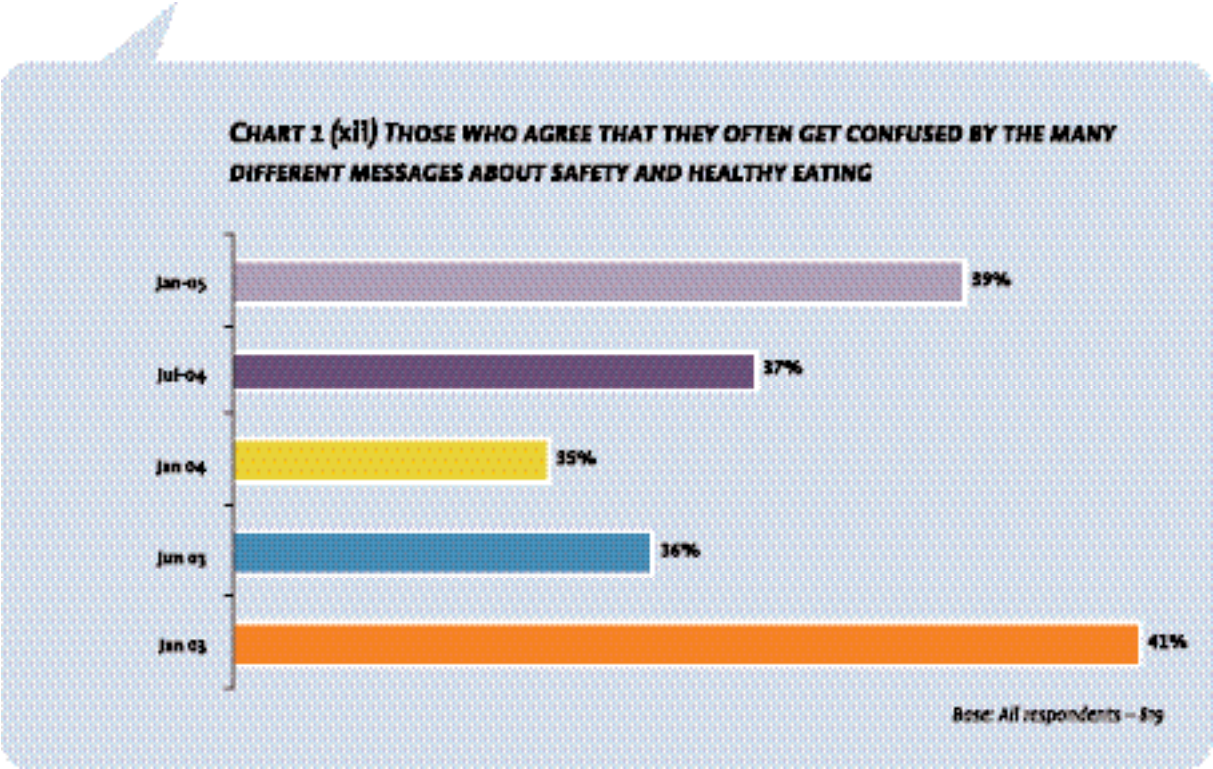
Chart 1(xi) Effectiveness of vehicles for assuring you of the safety of dairy products (Prompted)



Base: All respondents – 819

Confusion still exists

While there is currently a high level of concern about food safety issues, there still appears to be some confusion among consumers regarding the types of messages reaching them, with almost four in ten saying they often get confused by messages about food safety.



2. Food preparation and quality assurance

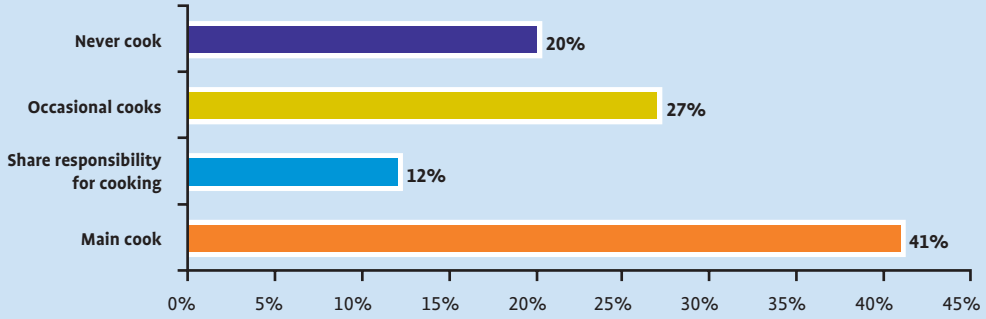
This section examines the cooking behaviour of the population across the island of Ireland before exploring consumers' awareness of quality assurance signs and schemes and whether awareness of these schemes affects consumption behaviour. It then explores the seasonal issue of how consumers cook their Christmas turkey.

Cooking behaviour

The majority of consumers cook on at least an occasional basis, with just one in five saying they never cook, either because somebody cooks for them or because they normally eat out or eat convenience foods. Males would appear much less likely to cook than females — 50% compared to 87% of females.

There is also a high level of correlation between cooking and grocery shopping, with 72% of those responsible for the main grocery shopping stating that they are the main cook in their household, compared with just 6% of those who do not do the grocery shopping.

CHART 2(i) COOKING BEHAVIOUR



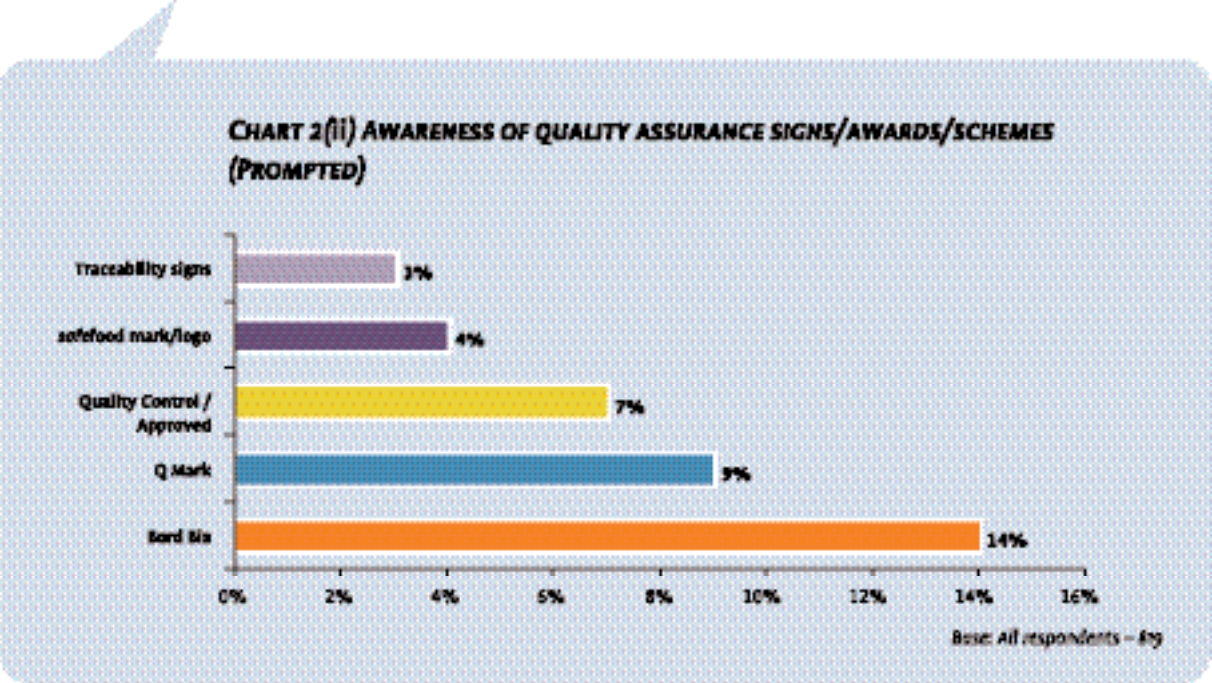
Base: All respondents – 819

Quality assurance signs / awards / schemes

When consumers were asked, without prompting, whether they were aware of any quality assurance signs, awards or schemes, 9% of consumers across the island of Ireland mentioned the Q Mark, with 7% mentioning 'quality control'/'approved'.

safefood's symbol/logo was mentioned spontaneously by 4%. There was a high level of correlation between awareness of ***safefood's*** advertising and the likelihood of mentioning the ***safefood*** logo.

When shown a selection of quality assurance symbols/signs, recognition levels were highest for the Bord Bia mark at 14%. The Q Mark continued to be well recognised (acknowledged by 9%), as did the quality control/approved sign (7%).



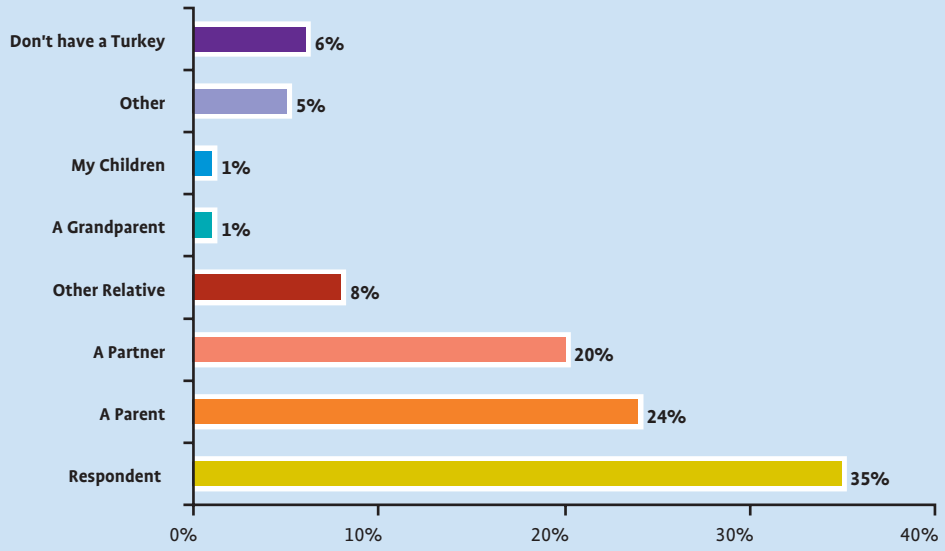
Consumers were positive about the effect that seeing such quality assurance signs and symbols would have on their purchasing behaviour, with 27% stating that these signs would affect their decision to purchase particular products a great deal. A further 34% stated that these symbols would somewhat influence their decision.

It is 'gatekeepers' (i.e., primarily female main grocery shoppers) and ABC1 s who are most likely to be influenced by quality assurance symbols – not surprisingly given that these individuals have high levels of food safety awareness.

Cooking the Christmas turkey

Those classified as the 'Main Cook' above are also most likely to be responsible for cooking the Christmas turkey, i.e. typically defined as a parent or partner or indeed the respondent themselves.

CHART 2(iii) RESPONSIBILITY FOR COOKING THE CHRISTMAS TURKEY



Base: All respondents – 819

Of those who are responsible for cooking the Christmas turkey, four in ten believe the bird should be given 20 minutes per pound plus 20 minutes extra, with one in three believing the bird should be given 25 minutes per pound plus 25 minutes extra, when provided with a choice of different cooking times. This would indicate that those responsible for cooking the bird are unlikely to undercook it and thus it would appear that the risk of food poisoning in this context is low. It would appear that ***safefood's*** cooking message at Christmas has resonated well with the consumers targeted.

Just under half of those who cook the Christmas turkey stuff the bird, with the majority (six in ten) stuffing the cavity. Most cooks would appear to use a bread stuffing (64%) with just over one in five using a bread and meat stuffing. While less than half of those responsible for cooking the bird weigh it after it has been stuffed, nearly three quarters add extra time to the cooking of the bird if using a meat stuffing. While it is reassuring to see that additional time has been given to cooking the turkey if stuffed with meat, more work may need to be done to educate consumers on the correct amount of additional time necessary.

3. Nutrition

Section 3 provides a clear benchmark for consumers' attitudes and behaviours towards salt in their diet. It first focuses on consumers' awareness of the correct amount of salt they should consume as part of a healthy diet and then follows by exploring how consumers season their food and their awareness of foods high in salt. Finally, the section investigates what consumers believe are the likely health effects of a diet high in salt and the key ways that these risks can be reduced.

The right amount of salt

When asked to specify the amount of salt they believe they should eat over a typical day, including salt which is already added to food, 42% said they didn't know and 51% specified an incorrect amount. Given the potential risks associated with a diet high in salt, this indicates a distinct and urgent need to educate the population on the correct amount of salt that should be consumed as part of a healthy diet.

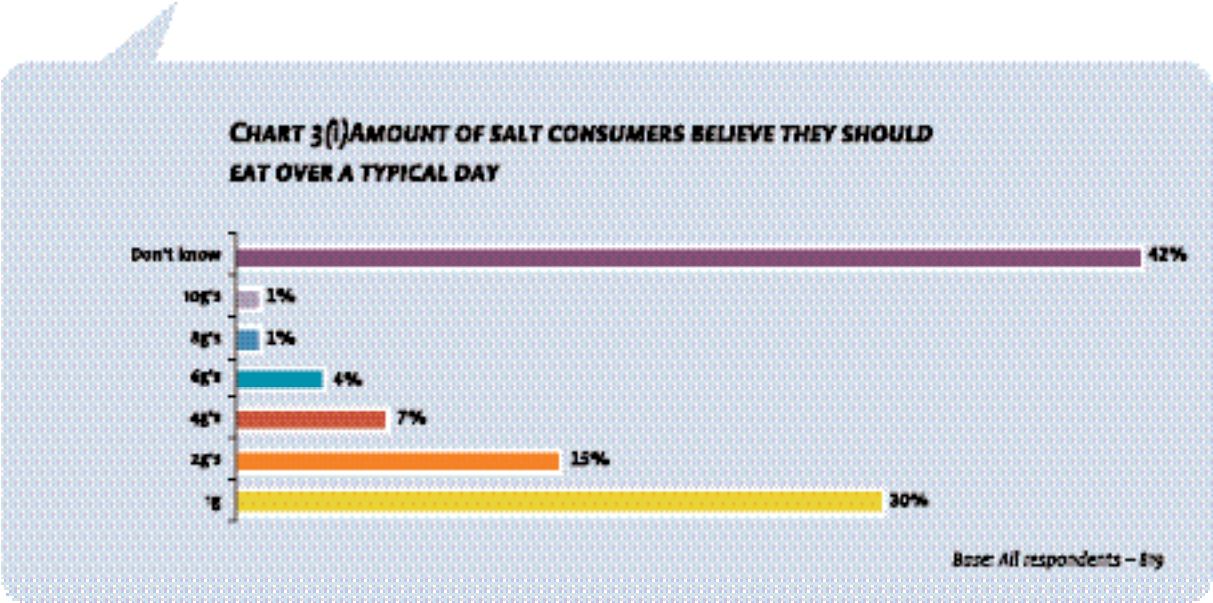
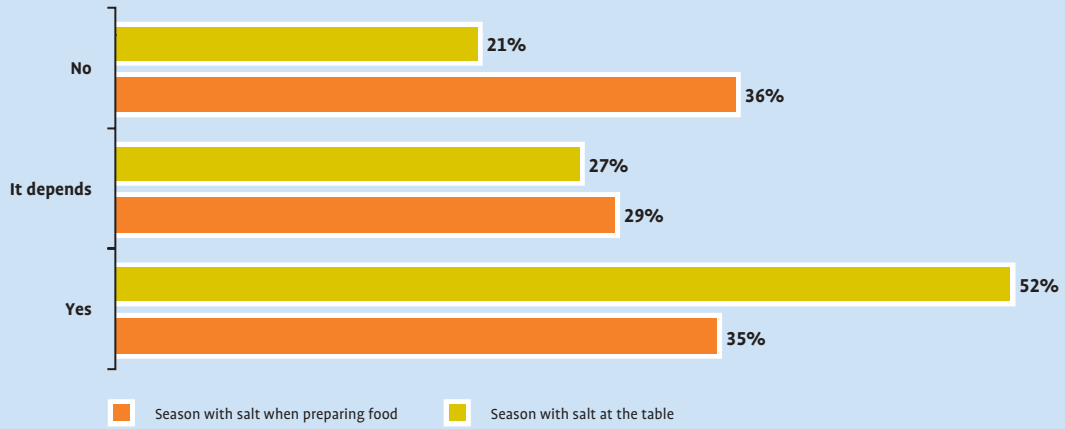


CHART 3(ii) SEASONING FOOD

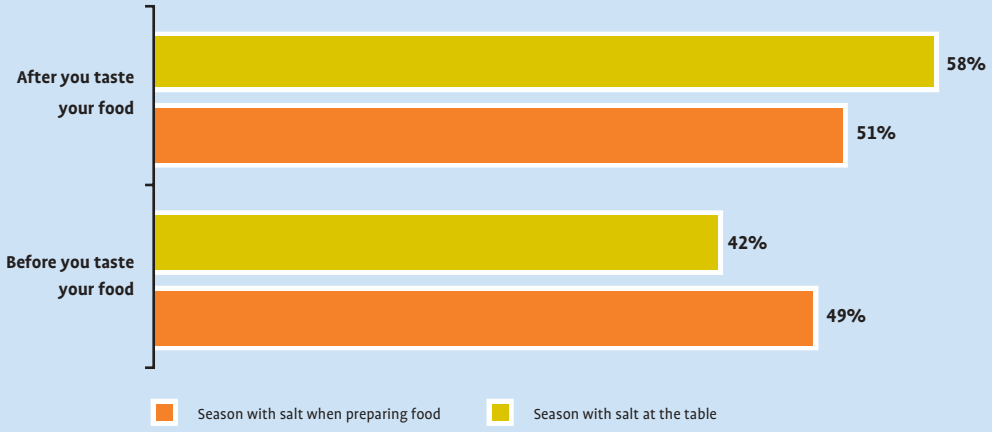


Base: All respondents – 819

More than half of consumers across the island of Ireland season their food with salt at the table, while another quarter stated 'it depends'. At the same time, more than a third of the population claim to add salt when preparing food, with another three in ten saying 'it depends'. Overall, this indicates a high predisposition to season food with salt.

Even more alarming is the finding that half of the population add salt when preparing a meal before tasting the food and just over four in ten repeat this when at the table. This indicates that seasoning is a habitual rather than a taste issue for many consumers.

CHART 3(iii)WHEN IS FOOD SEASONED

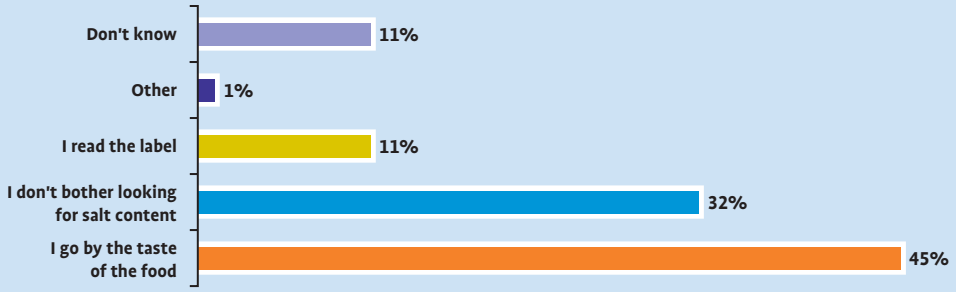


Base: All respondents – 819

The research also finds that a third of the population doesn't look at packaging for salt content when eating, with less than half going by the taste of the food to determine its salt content. Only one in ten actually reads the label to establish the level of salt in the food.

Males are significantly less likely than females to pay attention to the salt content in their food, as are those aged under 35.

CHART 3(iv) HOW DO YOU KNOW THE AMOUNT OF SALT A FOOD HAS BEFORE IT IS EATEN



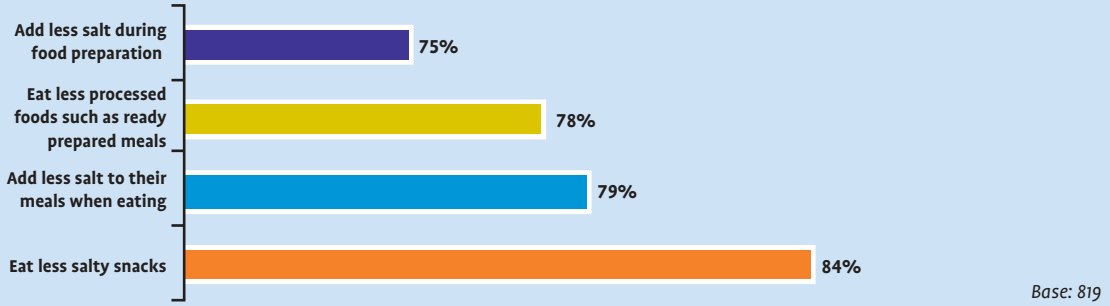
Base: All respondents – 819

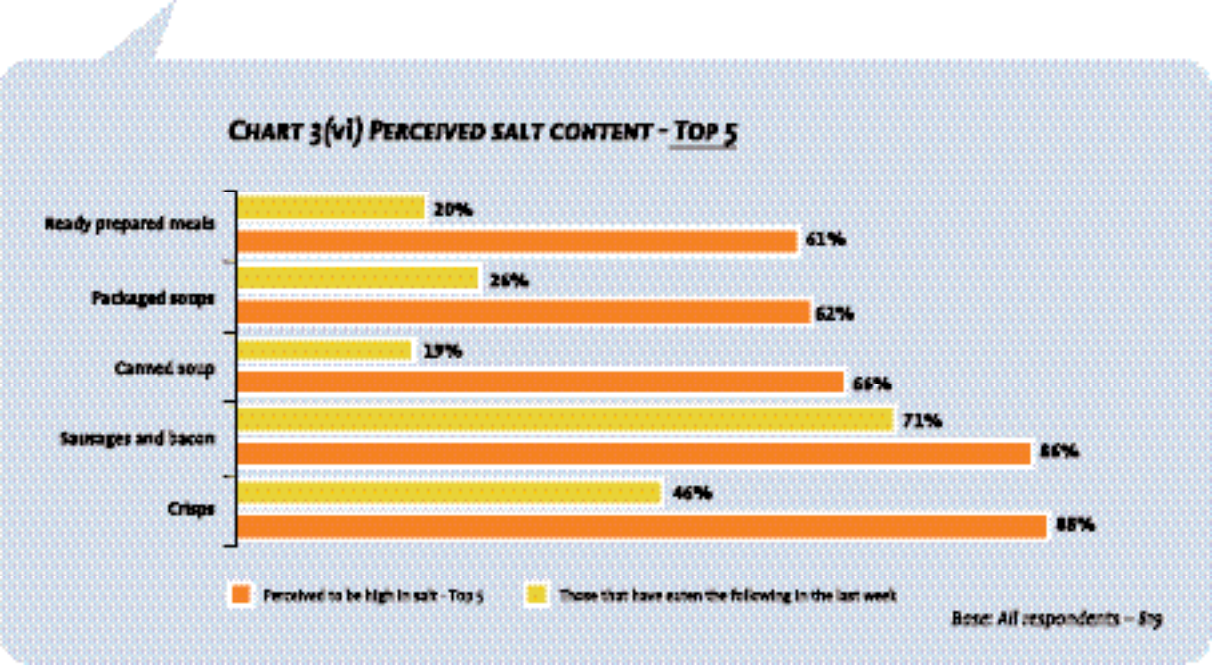
Salt and health

While consumers across the island pay little attention to the salt content of their food, ironically they tend to be quite aware of the ways to effectively reduce salt in their daily diet. More than eight in ten consumers stated that eating fewer salty snacks would help reduce their salt intake, while similarly high numbers are aware of the benefits of adding less salt when eating, eating less processed food and adding less salt when preparing food.

Consumers are also aware of the high salt content of foods such as crisps, sausages and bacon, canned soups, packaged soups and ready meals. However, this awareness has not stopped them from consuming these foods, especially in the case of sausages and bacon. Young males would appear to be the most likely to consume those foods which they know to be high in salt, suggesting an ambivalence to the longer term effects that high salt intake can have on their health.

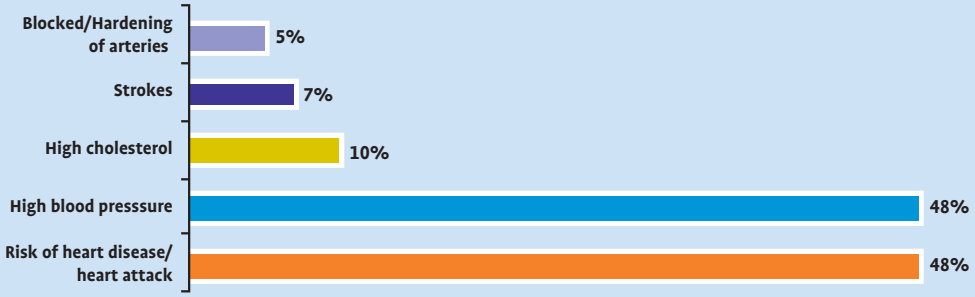
CHART 3 (V) THOSE WHO BELIEVE THE FOLLOWING IS A VERY EFFECTIVE/EFFECTIVE WAY OF HELPING CUT DOWN SALT CONSUMPTION





Almost nine out of ten adults are aware that a diet high in salt is bad for you (although females are significantly more likely to be aware of this than males, as are older consumers). It would appear, therefore, that the issue is not necessarily a need to inform consumers about the foods that are high in salt, rather the likely effect it can have on health in the long term. Chart 3 (vii) illustrates at an unprompted level the effect a diet high in salt is perceived to have on health. Almost half of the population in each case mentioned high blood pressure and the risk of heart disease as being among the most likely effects of a diet high in salt. However, more needs to be done to inform the public, especially young males, about the need to reduce salt consumption.

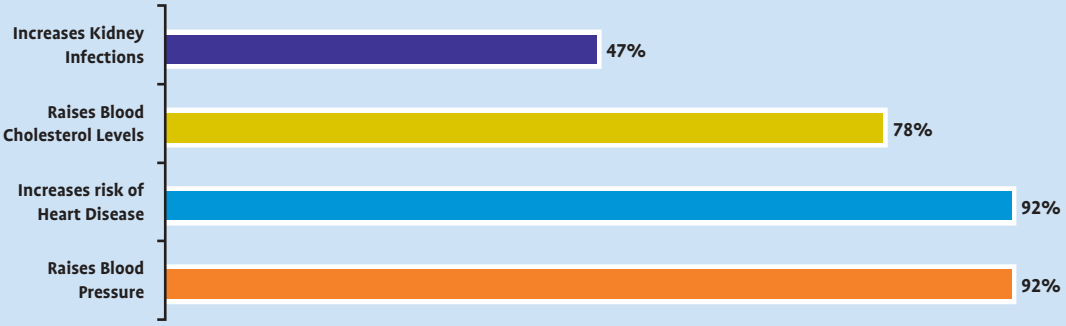
CHART 3 (vii) LIKELY EFFECT OF A DIET HIGH IN SALT (UNPROMPTED)



Base: All respondents – 819

It appears that consumers across the island are aware of the risks of a diet high in salt, especially the effect it can have on blood pressure and in raising the risk of heart disease. However, many consumers are choosing to ignore these risks. It could also be argued that the battle to reduce salt content in food will be a challenging one, as behaviour in this context is largely unconscious.

CHART 3(viii) THOSE WHO BELIEVE THE FOLLOWING IS VERY LIKELY / LIKELY IF YOU HAVE A DIET HIGH IN SALT (PROMPTED)



Base: All respondents – 819

4. Advertising awareness and effectiveness of safefood advertising

A key objective of this research was to establish the effectiveness of ***safefood's*** advertising. This section examines three different commercials, which aired in late 2004 / early 2005. These ads focused on cooking the Christmas turkey properly, food hygiene in the kitchen and food hygiene in the office. Christmas advertising appeared on TV and radio and was supported by promotional literature, while the office and kitchen advertising appeared on TV only.

As well as exploring awareness of ***safefood*** advertising among consumers on the island of Ireland, 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 its ability to cause an actual change in behaviour.

Christmas

Kitchen

Office

Recalling safefood's involvement in advertising at a spontaneous level

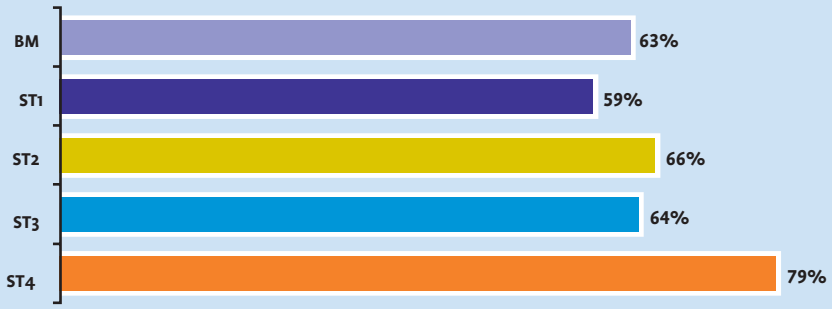
While many organisations and groups communicate a food safety message as part of their broader activities, ***safefood*** was the organisation that consumers on the island of Ireland were most able to remember advertising on the issue of food safety during the past six months. Nearly three in ten consumers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

safefood also leads the way in terms of spontaneous recall of radio advertising, mentioned by 12% of consumers, higher than any other organisation. This is also the case for ***safefood's*** promotional literature (14%).

There has been a significant increase in the percentage of consumers who have seen at least one of ***safefood's*** TV ads, rising from 64% in the summer of 2004, to 79% in January 2005. This is possibly related to the timing of the advertising, in particular around Christmas time, when consumers tend to watch more television than they normally would during the rest of the year.

Females are significantly more likely than males to recall at least one of the TV ads (84% v. 73%), as are ABC1s. Those who stated that they watch TV3 most often are also significantly more likely (85%) to have seen at least one TV advertisement than those who watch RTE most often (75%).

CHART 4(i) THOSE WHO HAVE SEEN AT LEAST ONE OF safefood'S TV ADS



Base: All respondents for each wave

Of the three advertisements shown on television, it was 'Christmas' which had the most reach, being seen by six in ten consumers. 'Kitchen' and 'Office' advertisements were seen by just under half of consumers on the island of Ireland.

In addition to the television advertising which was aired, ***safefood*** also ran advertising on radio. This advertisement was recalled by just over a quarter of consumers, with females significantly more likely (30%) than males (23%) to have heard the radio advertising.

In addition, a quarter of consumers recalled seeing ***safefood's*** promotional literature, with females and main grocery shoppers again more likely to recall reading it.

When asked to identify without prompting the organisation behind the advertisements, half of those who recalled at least one of the TV advertisements stated ***safefood***/the Food Safety Promotion Board at some level. However, consumers were more likely to associate ***safefood*** with the radio advertising and the promotional literature, highlighting the efficiency and value of these channels for food safety promotion.
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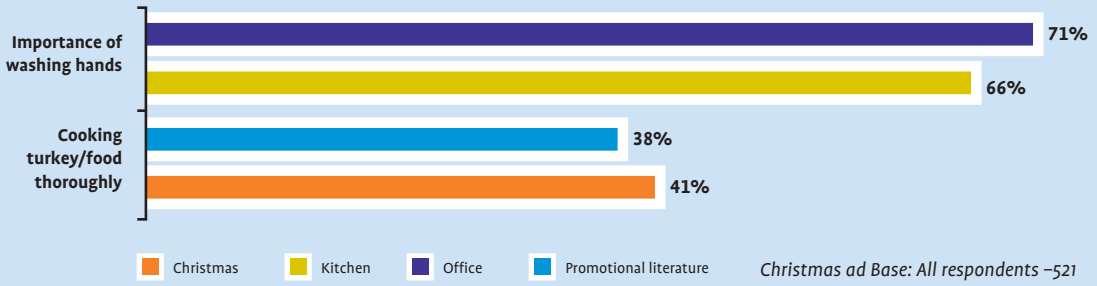
Table 4(i) Recall of agency involved in the advertisement - Unprompted

AGENCY	TV ADVERTISING	RADIO ADVERTISING	PROMOTIONAL LITERATURE
Food safety promotion board	25%	37%	37%
safefood	20%	34%	36%
safefood/FSPB	5%	6%	13%
Other	5%	1%	1%
Don't Know	46%	25%	17%
Base:	645	194	185

Consumers are taking two main messages from all of the ***safefood*** advertising, namely the need to cook turkey thoroughly in the case of the Christmas ads and promotional literature, and the importance of hand washing before eating or preparing food in the case of the Office and Kitchen ads.

CHART 4(ii) MAIN MESSAGES COMMUNICATED BY CHRISTMAS, KITCHEN, OFFICE AND PROMOTIONAL LITERATURE ADVERTISEMENTS



Christmas ad Base: All respondents –521
Office ad Base: All respondents –401
Kitchen ad Base: All respondents – 405
Promotional literature Base: All respondents -185

Other messages taken from the Christmas advertising include avoiding food poisoning, while in the case of the Office and Kitchen ads there is more emphasis on cleanliness and general hygiene.

Effectiveness of the advertising campaigns

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

Table 4(ii) Rating the effectiveness of safefood advertising

AGENCY	TV ADVERTISING	RADIO ADVERTISING	LITERATURE
Really capturing your interest	70%	67%	66%
Delivering a message of relevance to you	68%	64%	61%
Telling you something you didn't already know	50%	47%	49%
Getting the point across in a clear way	73%	69%	69%
Being hard hitting	63%	60%	63%
Base:	819	819	819

All of the advertisements scored highly across all statements, although they were not as strong in terms of 'telling you something you didn't already know', which may be proof of the effectiveness of ***safefood*** advertising at informing consumers over the last two years. 'Gatekeepers' are consistently more likely to rate all of the ads as good/very good across all factors, probably as the message of the advertising is more likely to be of relevance to them.

The success of the advertising in addressing its key objectives is clear in the findings detailed in table 4(iii) below. All of the advertisements scored highly, with more than seven in ten consumers rating the advertisements as "good" or "very good" based on each objective.

Table 4 (iii) Specific communication objective of advertisements

STATEMENTS	Christmas (TV & Radio)	Kitchen (TV only)	Office (TV only)
1. Making you conscious of the need to cook your turkey thoroughly at Christmas	70%		
2. Making you more aware that your turkey contains harmful bacteria	72%		
3. Informing you that to cook it properly the juices should run clear	70%		
4. Making you wash your hands before handling food		72%	72%
5. Highlighting the various ways germs can spread from hands to food		73%	74%
6. Shows how cross contamination can happen		76%	75%
7. Highlighting the various ways germs can spread in the office			73%

Base: All respondents - 819

safefood's advertising has been well received by consumers and in particular, by gatekeepers, who are responsible for cooking and grocery shopping. However, the true success of advertising can really be assessed by the extent to which it can change consumer behaviour.

Causing a change in consumer behaviour

Social marketing is a process whereby standard marketing principles are used to pursue social benefits by seeking to influence a population's behaviour. Social marketing tools increase participation and retention of messages, and can facilitate health-related and other behavioural changes.

While one of the goals of ***safefood's*** advertising has been 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, a quarter of consumers have already changed their behaviour because of ***safefood's*** advertising campaign, with a further 20% planning to change their behaviour.

Table 4(iv) Most likely actions as a result of the advertisements

STATEMENTS	ST3	ST4
"It made me think more about food safety and I have *already* changed my behaviour as a result of the ad"	22%	25%
"It made me think more about food safety and I *plan* to change my behaviour as a result of the ad"	21%	20%
"It made me think more about food safety and I plan to find out more about this issue in the near future"	N/A	12%
"It made me think more about food safety and *I may look into* this issue at some stage"	22%	10%
"It made me *think more* about food safety but it is *unlikely* I will look into it any further"	15%	20%
Don't know	19%	14%

Base: All respondents - 819

Those most likely to have changed or to plan to change their behaviour in relation to food safety are much more likely to be those who have responsibility for food in their household. While the primary target for such messages is still undoubtedly this segment, more attention may need to be given to those who may or are unlikely to change their behaviour in relation to the issue. This may necessitate exploring 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.

However, it is likely that a natural plateau has been reached in this context, with an increase in those who have already changed their behaviour as well as an increase in those who are unlikely to change their behaviour in the future. Thus, it could be argued that the ability of ***safefood's*** current food hygiene campaign to effect positive change in terms of food safety may have peaked.

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 the current measures being taken.

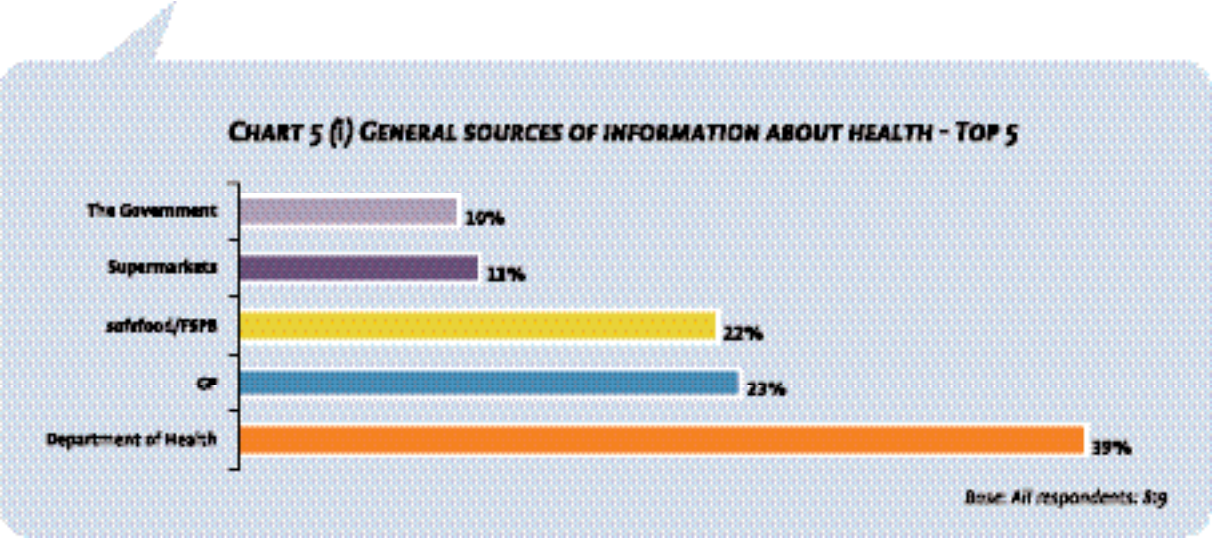
Sources of information on food hygiene, food safety & nutrition

When asked, without prompting, to name one organisation or company that is best in terms of making consumers think more seriously about food safety, 16% mentioned ***safefood***, an increase of 4% from July 2004. A corresponding decrease occurred for the Department of Health, which was also mentioned by 16% this wave. Bord Bia, Health Boards and the Food Safety Authority make up the remainder of the Top 5, with 10%, 8% and 7% respectively mentioning each.

In terms of promotion in the area of food safety, ***safefood*** again led the way, mentioned by 21% (an increase of 6% from July 2004).

Asked to name organisations they believed to be a general source of information on health, over one in three consumers across the island mentioned the Department of Health, with another third mentioning their local GP. ***safefood*** rated third in this respect, mentioned by one in five consumers.

safefood was significantly more likely to be named as a source of information about health by females and also by ABC1s. Interestingly, women were also more likely to mention supermarkets as a source of information on health matters.

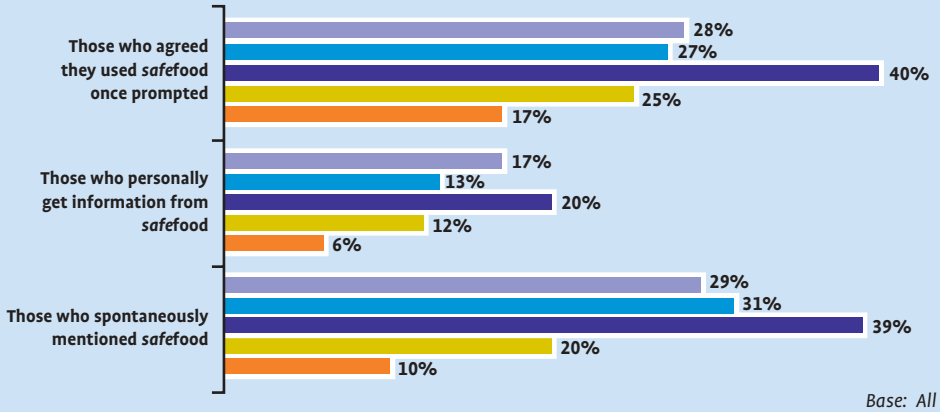


Participants were next asked what organisations they would consider to be key sources of information on food hygiene, standards and safety. They were first asked this at a spontaneous level before being asked the same question at a prompted level. They were also asked to identify where they personally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

In terms of where consumers actually personally source their information (at an unprompted level), the media (19%), continues to be the main source of information, followed closely by ***safefood*** (17%). There has been an increase of 4% since July 2004 in the proportion of consumers likely to mention ***safefood*** as a personal source of information, underlining ***safefood's*** relevancy to consumers across the island .

The Department of Health (25%) and the Food Safety Authority/Food Standards Agency (14%) were identified as key sources of information (at an unprompted level) about food hygiene and safety, with ***safefood*** topping the list (29%). At a prompted level, ***safefood*** continues to be the main source of information on food safety and hygiene.

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



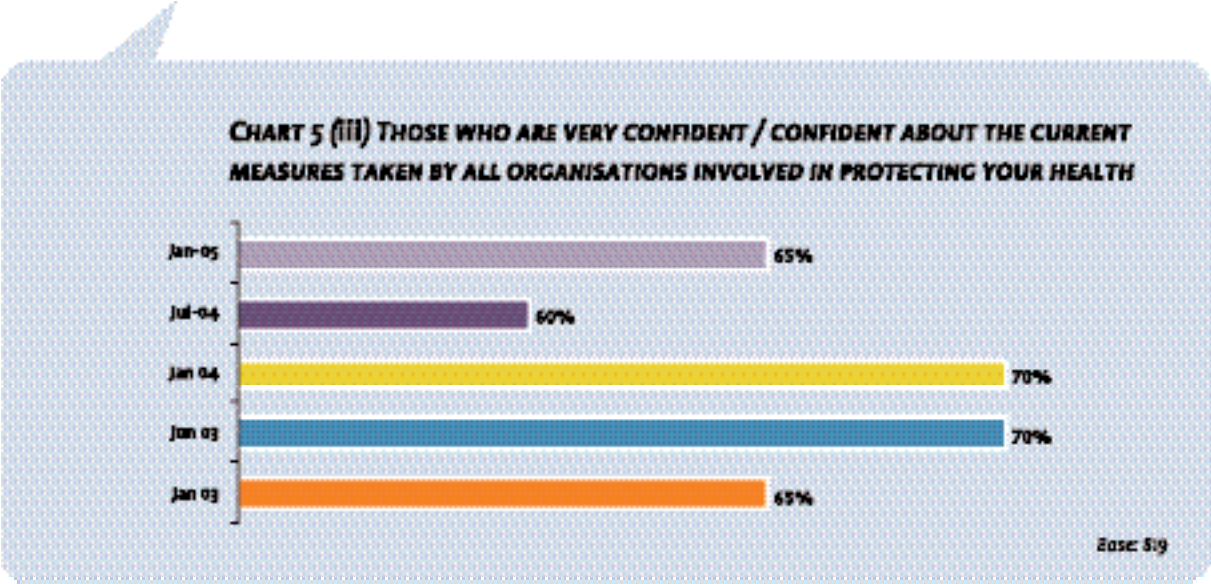
Base: All respondents for each wave

Level of confidence in current measures being taken with regard to food safety

Despite an increase in concerns about the origins of food, there has also been a significant increase in confidence in current measures being taken to ensure food safety since the low recorded in 2004. Those aged 15-24 are more sceptical, however, than older consumers in this respect.

Those who have expressed a concern about food safety in general (and who are therefore more likely to be aware of measures to ensure food safety) are more confident in measures being taken than those who claim not to be concerned.

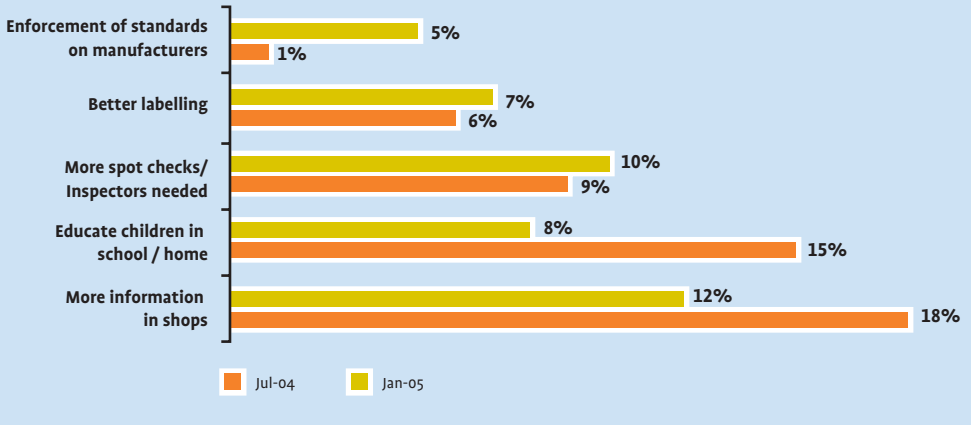
In general, consumers would appear to be confident about the measures taken by organisations on the island charged with protecting the public's health.



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. While there has been a significant decrease in the percentage of consumers who feel that more information about food safety should be provided by means of leaflets/information in shops, it still appears to be the most popular suggestion.

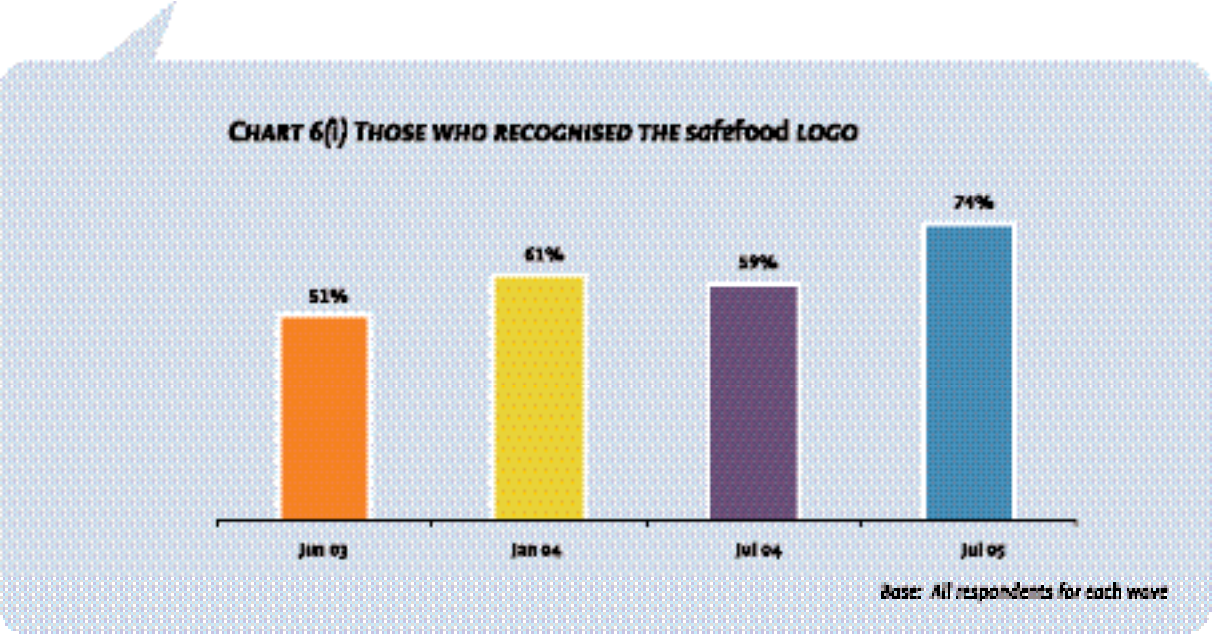
CHART 5(iv) MEASURES THAT CAN BE TAKEN TO IMPROVE FOOD SAFETY (EXCLUDING ADVERTISING)



Base: Jan - 05
Jul - 04

6. The safefood brand

This final section looks at how recognition of the ***safefood*** brand has evolved 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 has increased significantly since July 2004, to its highest score to date, with almost three quarters of consumers across the island correctly attributing it to ***safefood***.

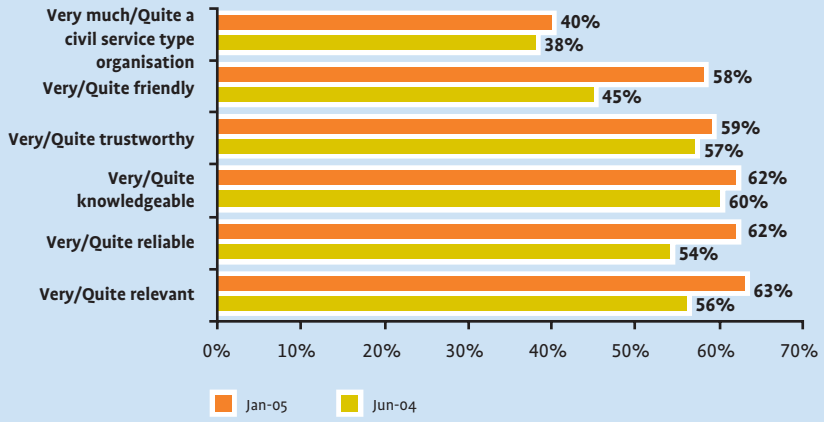
Females are significantly more likely to recognise the logo than their male counterparts, as are main grocery shoppers. It is these individuals who are most concerned about food safety and are therefore more open to the ***safefood*** message.

safefood attributes

Respondents were presented with a list of six attributes and asked to rate on a scale of 1-5 how they felt the words best described ***safefood*** based 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. There has, however, been a significant increase since July 2004 in the proportion of the population who feel that ***safefood*** is friendly, relevant and reliable.

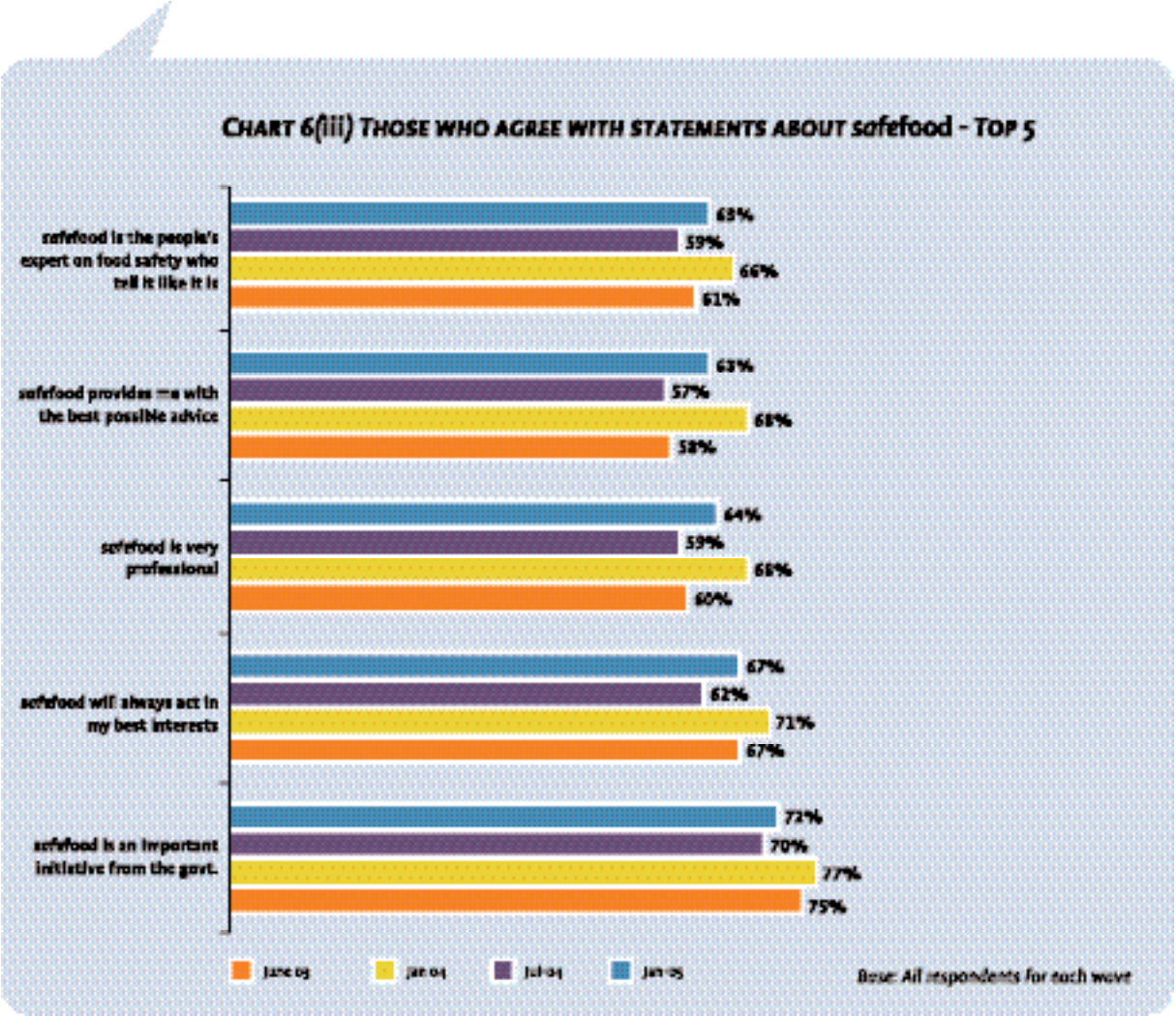
CHART 6(ii) HOW CONSUMERS DESCRIBE SAFEFOOD BASED ON THEIR EXPERIENCE OF THE ORGANISATION OR ITS ADVERTISING



Base: All respondents in each wave

Evaluating safefood

Finally, a number of statements were evaluated which investigated how effectively ***safefood*** performs from a consumer perspective. The chart below highlights how strongly ***safefood*** has performed on these key criteria. This performance underlines the effectiveness of ***safefood's*** marketing strategy, most notably its advertising and PR activities, in building a strong and important relationship with consumers north and south.



7. Key conclusions

This fifth wave of research clearly demonstrates that, since early 2003, attitudes towards food safety and food hygiene have changed in a positive and constructive way. ***safefood*** has been key in bringing about this change through well-executed and relevant above the line advertising and informative and user-friendly promotional literature.

In terms of advertising specifically, it is clear that the campaign has worked very effectively, with nearly eight in ten consumers across the island of Ireland aware of at least one ***safefood*** advertisement, and recall highest among those classified as 'gatekeepers'. Furthermore, those who can recall the advertising can also accurately articulate the intended message such as 'Cooking the turkey until the juices run clear' and 'The importance of washing hands before eating or preparing food'. In this vein, it is also clear that ***safefood*** advertisements continue to succeed 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.

However, it is becoming evident that those who are most likely to be concerned about food safety are most likely to recall ***safefood's*** advertising, either at a prompted or unprompted level, suggesting that a more 'grassroots' approach may need to be taken with those consumers for whom food safety remains an unimportant issue. It has also become evident that the ability of ***safefood's*** current advertising campaign to change actual behaviour may have reached a natural plateau, with increases in both those whom have changed their behaviour in line with ***safefood***'s objectives and those who will consciously continue to approach food hygiene in an uninformed way. In this context, it could be argued that the ability of the current campaign to deliver positive behavioural changes, in the immediate future at least, may be limited.

The research also strongly demonstrates that ***safefood*** as a brand is well recognised, with it increasingly being viewed as the organisation with responsibility for promoting food safety. ***safefood*** also continues to grow as an organisation that consumers personally use as a source of information about food hygiene, standards and safety, testament to the fact that ***safefood*** is continuing to be regarded less and less by consumers as a bureaucratic organisation.

In summary, it would appear that consumers across the island have become more aware of the importance of food safety in their day-to-day lives.