safetrak 5

Consumer Tracking Research

September 2005

Contents

Executive Summary

Introduction

Established in 1999 under the terms of the Good Friday Agreement, ***safe*food** operates 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. While ***safe*food** has concentrated up to now on promoting food safety and hygiene, the organisation is also responsible for promoting a healthy and balanced diet, which has been addressed for the first time in late spring 2005.

A key element of ***safe*food's** strategy is to foster and maintain awareness of food hygiene and to promote healthy eating through the development of a comprehensive communications programme, targeted at consumers on the ground. This programme is unique in that it covers all consumers on 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 model has been developed and has been in operation since January 2003. This safetrack research programme enables ***safe*food** 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 been designed 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 ***safe*food's** advertising campaigns across different media i.e. TV, Radio, Press, Billboards, Promotional Material etc;
- 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);
- Consumers consumption of specific food types such as Fish, Poultry and Dairy;
- Consumer's experiences of the key sources of information about food safety and healthy eating and their perceptions of the respective responsibilities of different sources;
- Finally, consumers' views on the actual safe food brand and its utility are explored.

The safetrack research programme has been running since January 2003, and since then there have been five subsequent "waves" of research (June 2003, January 2004, July 2004 and January 2005, Jun/July 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 ***safe*food's** communications' activities; revising the latter in light of the research findings.

1. Food Preparation and Attitudes towards Safe / Healthy Eating

This survey began by establishing how concerned consumers' were about food safety and healthy eating issues. Just fewer than 2 in 3 consumers on the island expressed concern about food safety, one of the lowest scores since research began. Key concerns for consumers in this space included the "cleanliness of kitchens in food establishments" and the "risk of food poisoning". While 6 in 10 consumers are concerned about healthy eating, just over 1 in 10 would describe themselves as "Good Foodies", suggesting that good intentions have yet to manifest themselves into action for most consumers. This may partially be explained by the huge amount of information and misinformation in the public domain regarding health and diet, with nearly half of consumers stating that they get confused by the many different messages about healthy eating. A key dietary concern for most consumers going forward will be issues such as "fats in food" and "salt/sugar intake".

2. Nutrition

This section sets out to establish how consumers judge the level of salt in their diet. It is positive to see that a growing number are now using food labels to indicate salt content as opposed to the traditional method of tasting. Attention was next turned to "fats" in foods, with 6 in 10 consumers aware that a diet can contain a healthy amount of fat. Most consumers were also able to correctly distinguish between "good" fats i.e. omega 3 and "bad" fats i.e. cholesterol. However a large percentage of respondents were likely to state "don't know" for some of the bad fats, particularly Transfats and Hydrogenated fat.

In terms of fat reduction, nearly half of the consumers surveyed opt for low fat varieties when purchasing milk and spreads, however less than 1 in 7 opt for reduced fat cream or ice-cream. Just fewer than 6 in 10 consumers eat fresh meat 3 to 5 times a week. When cooking meat, most consumers trim the excess fat (56%) with grilling the preferred cooking method (73%). Finally, the perceived benefits of fish consumption were explored, with almost 1 in 2 consumers eating fish on a weekly basis, with most having a preference for fresh white fish. More than 90% of consumers believe fish is a healthy food, with the key benefits believed to be its oils and low fat content.

3. Advertising Awareness and Effectiveness

Those consumers that could recall at a spontaneous level having seen a television commercial for ***safe*food** has dropped significantly over the last 6 months from 29% to 18%. A number of external factors have to be considered for this drop, namely the reduction in advertising weighting.

Television continues to be the most effective medium when compared to radio and newspapers, with over 3 in 4 consumers aware of a ***safe*food** TV ad at a prompted level, compared to 3 in 10 for Radio and 1 in 5 for Newspaper.

In terms of advertising effectiveness, Office and Kitchen appear to have achieved most cut through, with all of the messages recalled at an unprompted level attributed to these two commercials i.e. 4 in 10 consumers believed the main messages communicated by ***safe*food** advertising this wave was "the importance of washing hands before eating and/or preparing food".

Looking specifically at the messages recalled for the "Salt" radio commercial and heart newspaper ad, 1 in 3 believed both ads scored strongly on communicating key criteria, with more than three quarters of consumers believing that both ads were effective at "Informing them about the large amount of salt in processed food" and "encouraging you to cut down of salt".

Finally, both the "Salt" and "Heart" ads appear to have changed most consumers' behaviour towards salt, with 1 in 5 already claiming to have changed their behaviour as a result of the ad and over half planning to change or find out more about the issue going forward.

4. Sources of Information and Perceptions of Responsibility

While a large number of organisations and groups communicate the food safety message as part of their broader remit, the Department of Health is once again the organisation consumers believe was best at getting them to think more seriously about food safety, with 18% citing the organisation at an unprompted level, compared to 16% for ***safe*food**. The Department of Health also emerges as the organisation consumers believe is best at getting them to think more seriously about Healthy Eating, with 1 in 5 stating the organisation compared to 1 in 10 for second placed ***safe*food**.

While their has been a huge amount of information put into the public domain about healthy eating over the last number of years, it is very encouraging to find that nearly 1 in 4 believe ***safe*food** to be a general source on Healthy Eating, second only to GPs (27%). In terms of actually getting information on Healthy Eating, just over 1 in 4 receives it from their GP, 24% from Newspapers and Magazines and 21% from ***safe*food**.

5. The safefood Brand

Recognition of the ***safe*food** brand has dipped since the last wave, with 2 in 3 consumers aware of the logo, compared to 3 in 4 six months ago. Females and those living in the Republic of Ireland (ROI) were significantly more likely to be aware. Again, this dip may be attributed to reduced advertising weighting.

Consumers' opinion of ***safe*food** based on their experience of the organisation or because of exposure to it's advertising, continues to grow, with more than two thirds of consumers now viewing ***safe*food** as being "Knowledgeable" and "Relevant". Finally, in terms of ***safe*food's** ability to communicate the healthy eating message, 7 in 10 consumers believe the organisation has been "responsive to public concerns regarding healthy eating" and "provides me with good advice on healthy eating".

Conclusion

***safe*food** has become a highly respected and credible source of information for consumer's on the island of Ireland regarding food safety, standards and hygiene and, based on initial scores, is set to replicate this success in the Healthy Eating space.

Undoubtedly, ***safe*food's** healthy eating messages have already had a strong impact, with those who have seen or heard the advertisements more likely to be concerned about healthy eating and to have changed their behaviour as a result than those who have not been exposed. Going forward, there will be a clear onus on ***safe*food** to use TV commercials to communicate the dangers of diets high in fats, salt and sugar, as this medium continues to emerge as the optimum vehicle for promoting issues affecting consumer's behaviour towards food issues.

While it was recognised in the previous wave that a plateau has been reached in terms of ***safe*food's** ability to continue to be able to influence behaviour towards food safety and hygiene, there appears to be a strong desire by consumers to receive impartial and reliable advice on healthy eating. ***safe*food** is strongly positioned to provide education in this space.

Introduction and methodology

A Brief History

The establishment of ***safefood*** under the terms of Good Friday Agreement provided people on the island of Ireland with one of the first bodies dedicated to improving food safety and promoting healthy eating. While the two states on the island are set to remain separate for the foreseeable future, we have been challenged to respond to food crisis such as "BSE" and "Foot and Mouth" in a unified manner, due to our island status. Thus the relevance and value of ***safefood*** has continued to grow on both sides of the border. ***safefood's*** key objective will continue to protect and improve public health by fostering and maintaining confidence in food supply on the island of Ireland, in partnership with others relevant bodies.

In order to achieve this mission, a comprehensive communications programme using television, radio, print, outdoor advertising and Promotional Literature has been developed and implemented since January 2003.

In tandem with this communications 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 other relevant stakeholders, where appropriate) 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;
- Provide ***safefood*** with feedback on certain aspects of consumer behaviour and attitudes in relation to health and diet
- 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 consumers 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 ***safefood*** organisation and its brand.

The purpose of this report is to present key findings emerging from the most recent research conducted in June/July 2005 and where appropriate to show how these compare to both the benchmark study and subsequent research conducted in June 2003, January 2004 , July 2004 and January 2005.

Methodology

Safetrack 5 was conducted using two separate waves of research (5a and 5b), which were conducted two weeks apart. This approach has allowed a shorter questionnaire to be employed in comparison with previous waves, which it is contended, will improve the quality of data generated by reducing interviewee fatigue. Both surveys employed the exact same sample sizes and research points. For the purposes of reporting, both surveys have been merged to create one single document, safetrack 5. Eight hundred and fourteen face-to-face interviews were conducted throughout the island of Ireland over a three-week period in June / July 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.

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 ROI and NI. These quota controls in turn are arrived at by examining the most recent statistics published by the census offices. Basically, this means 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 years living in Northern Ireland is 1.213 million, based on the 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 approximately 17 minutes. The methodology of both this wave and the preceding waves of research (for comparative purposes) is summarised in Table (a) below.

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

Number of interviews	Benchmark Study (Jan 2003)	Wave 1 (Jun 2003)	Wave 2 (Jan 2004)	Wave 3 (Jul 2004)	Wave 4 (Jan 2005)	Wave 5 (Jul 2005)*
Island of Ireland	900	827	863	828	819	814
ROI	600	510	536	510	502	502
NI	300	317	327	318	317	312
Sample	Face to face interviews with adults aged 15-74 in their own homes – 17 minute duration * Sample sizes provided for ***safe*trak 5** represent the average for 5a(811) and 5b(816)					

Section 1 – Food Preparation and Attitudes towards Safe/Healthy Eating

This section firstly explores consumers' attitudes towards food safety issues and examines some of their key concerns, before establishing the number of consumers who have made complaints about food hygiene standards in supermarkets, pubs, restaurants etc.

Attitudes towards healthy eating are then explored as well as the level of concern consumers have about eating healthily. A number of specific contemporary food concerns are also identified and their effect on eating behaviour established. Finally, consumers concerns regarding fish and shellfish production, preparation and consumption as well as potential means of assuring fish and shellfish safety are investigated.

Section 2 – Nutrition

Section 2 begins by examining how people on the island of Ireland use and consume salt as part of their daily diet and some of the effective ways of reducing salt intake. Attention is next turned to the level of fat in consumer's diets and whether they believe a diet can contain a healthy amount of fat. Respondent's ability to correctly distinguish between good and bad fats is also investigated.

Consumption of specific fats is next explored, with particular attention paid to "low fat" dairy products. Attention is then turned to types of meat products consumers regularly eat and whether they cook meat in a healthy way. Finally, the types of fish consumed regularly by consumers are established as well as the specific health benefits consumers believe fish contains.

Section 3 Advertising Awareness and Effectiveness

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

Section 4 – Sources of Information and Perceptions of Responsibility

Section 4 deals with the public's identification and perception of key sources of information around healthy eating. It first sets out to identify general sources of information on the issue, before identifying specific sources consumers use to glean information regarding their diet.

Section 5 – The safefood Brand

This final section establishes recognition levels for the ***safe*food** brand, before exploring some of the specific qualities consumers believe the organisation possesses based on their experiences. Finally, ***safe*food's** ability to provide relevant and useful information regarding healthy eating is investigated.

Section 7 – Conclusions

1. Food Preparation and Attitudes Towards Safe/Healthy Eating

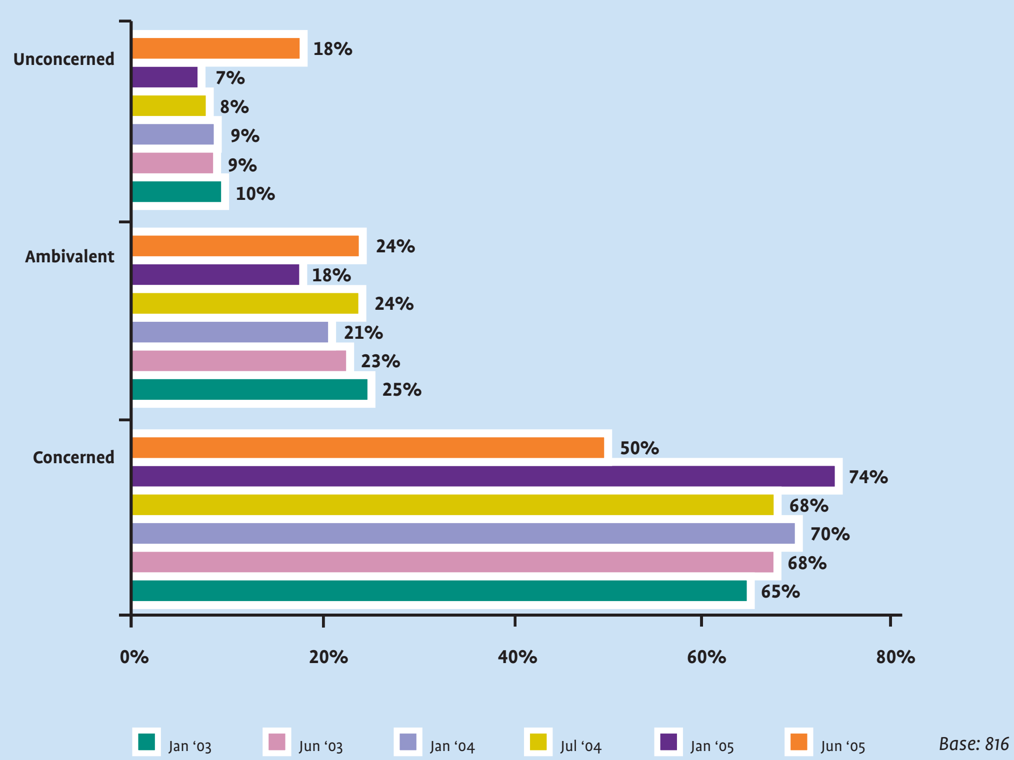
This section begins by establishing how concerned consumers are about food safety issues and goes on to establish how many have made complaints regarding food hygiene standards over the last 12 months.

Consumers attitude towards healthy eating and drinking are next investigated with the specific issues affecting healthy eating behaviour established. This section specifically examines concerns consumers' may have regarding fish and shellfish including production, preparation and consumption and details some of the ways fish and shellfish can be marketed to improve public confidence.

Concerns about Food Safety Issues

Respondents were asked to indicate their level of concern about food safety issues. Over half of the participants (56%) stated that they were concerned to some extent about food safety issues, the lowest level of concern about food safety issues since research began back in January 2003. This declining level of concern could be due to a number of factors including the scaling back of ***safe*food** "food safety" advertising, with emphasis shifting towards healthy eating. It may also affect the confidence in food safety measures on the island.

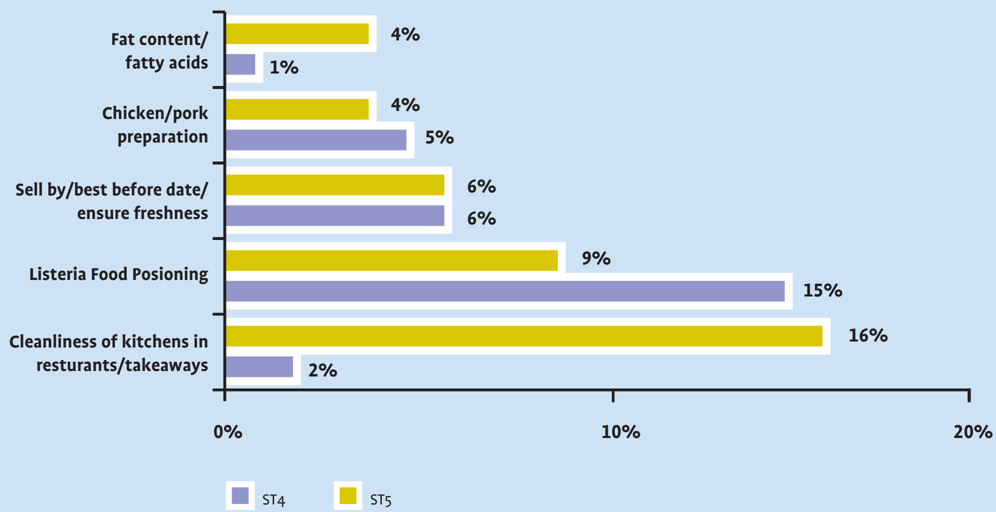
CHART 1(i) LEVEL OF CONCERN ABOUT FOOD SAFETY ISSUES (PROMPTED)



The demographic most likely to be concerned about food safety issues were females responsible for the main grocery shop Younger consumers, particularly those in the 15-24 year old bracket, most likely to be unconcerned. Concern about food safety issues is also likely to be a function of social class, with those in the ABC1 category more concerned than those in C2DE. Those in the Republic of Ireland also tended to be more concerned (1 in 4) compared to those in Northern Ireland (just under 1 in 7).

Having established the extent of their concern about food safety issues, participants were then asked at an unprompted level to indicate the food related issue they were most concerned about. As apparent from the chart below, there has been a significant increase in those who stated that they are concerned about the cleanliness of kitchens in restaurants/takeaways, whereas there has been a decrease in those who are concerned about "Listeria" and "Food poisoning". The reasons for this are unclear and should be researched going forward.

CHART 1(ii) FOOD SAFETY ISSUES OF MOST CONCERN (UNPROMPTED)



Base: 816

Attitudes to Eating and Drinking

While more than half of consumers are concerned about Food Hygiene, less than 1 in 10 have actually made a complaint about food hygiene in a supermarket, shop, hotel, restaurant or bar. Of those that have, half complained directly to the manager, with just fewer than 4 in 10 complaining to a member of staff, with the remainder complaining either to the owner or another representative.

As part of the benchmarking research undertaken by Amárach on behalf of ***safe*food** in January 2003, a measure of consumers' attitudes towards eating and drinking was developed and explored. Table 1.1 outlines the main groups that consumers can be categorised under according to their attitudes towards eating and drinking.

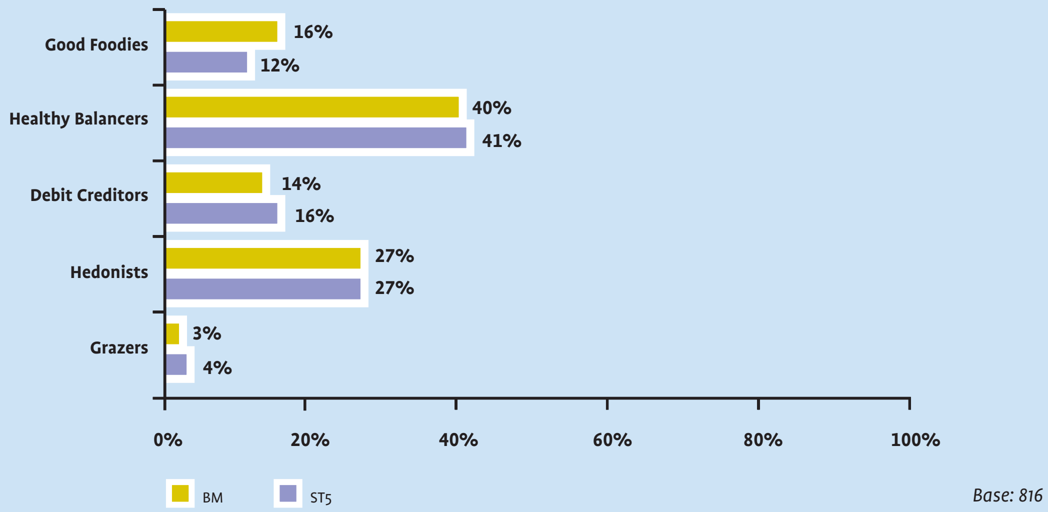
TABLE 1(i) CATEGORISING CONSUMER ATTITUDES TO EATING AND DRINKING

Good Foodies	Healty Balancers	Debit Creditors	Hedonists	Grazers
Those who only eat and drink things that are good for them	Those who don't worry too much as they consume enough healthy food such as fruit and vegetables	Those who can eat and drink whatever they want so long as they take lots of excercise	Those who eat and drink the things they enjoy and don't worry about it	Those who are not interested in food and will eat anything

Base: 816

Chart 1.3 highlights how little has changed over the last two and a half years, despite the large amount attention health and diet has been given in the Irish media over the last year in particular.

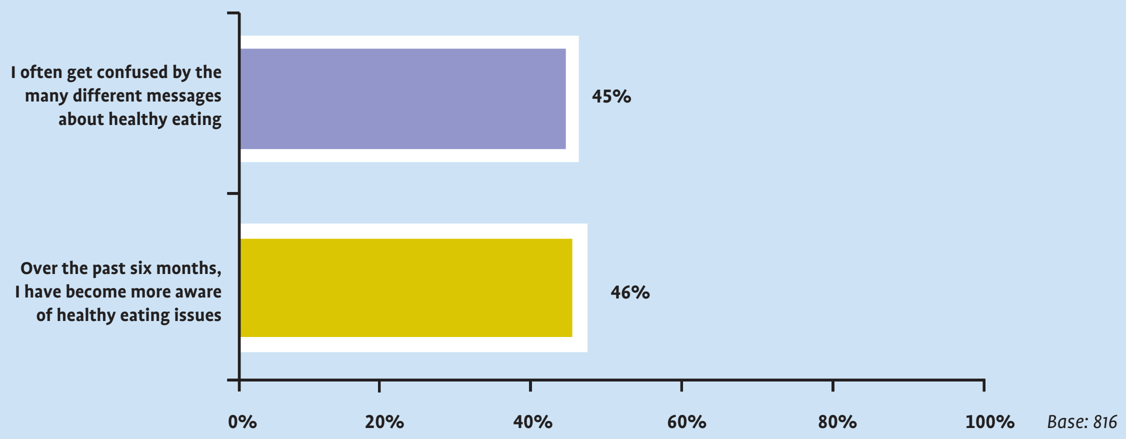
CHART 1(iii) ATTITUDES TOWARDS EATING AND DRINKING (PROMPTED)



Attitudes towards Healthy Eating

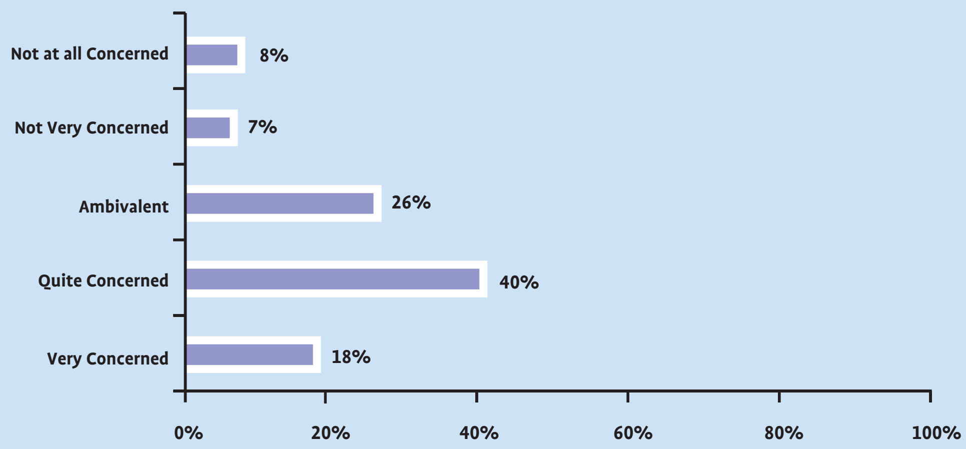
The last six months has seen ***safe*food** extend their remit to promote healthy eating. In order to successfully communicate the healthy eating message, it is important to first understand current consumer attitudes, concerns and behaviour in this area.

CHART 1(iv) FEELINGS ABOUT FOOD AND HEALH (PROMPTED) – THOSE THAT AGREE WITH THE FOLLOWING STATEMENTS



While nearly half of consumers have become aware of the different health messages in the public domain over the last six months, an equal number are confused about these messages, not surprising given the transient and faddish nature of diet information. Interestingly, those aged 15-24 are the least likely to become confused by the different messages about healthy eating, with those aged 25-34 the most likely to be concerned. Social class also played a role, with those from middle class backgrounds less likely to be confused, suggesting that confusion may be a function of education. Females are much more likely to have become aware of healthy eating issues over the last six months, particularly those aged 25 to 49, with interest levels spread equally amongst socio-economic backgrounds.

CHART 1(V) ATTITUDES TOWARDS HEALTHY EATING (PROMPTED)

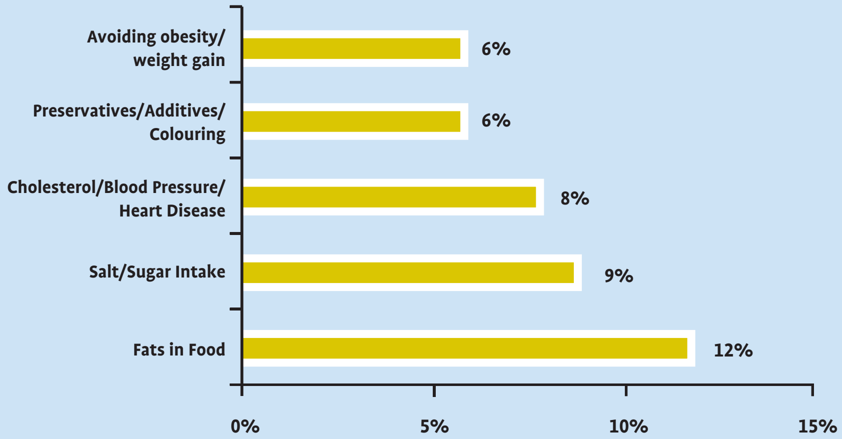


Base: 816

Almost 6 in 10 consumers stated that they were concerned about eating healthily, with females more likely to be concerned about eating healthily than males. Those aged 25-34 represent those most likely to be concerned about this issue, suggesting that interest in healthy eating may be a generational issue.

When asked to state the healthy eating issues they were most concerned about at an unprompted level, "Fat in food" came out as the leading concern, followed by sugar and salt intake, suggesting that ***safe*food's** current communication campaign in this space is both timely and appropriate.

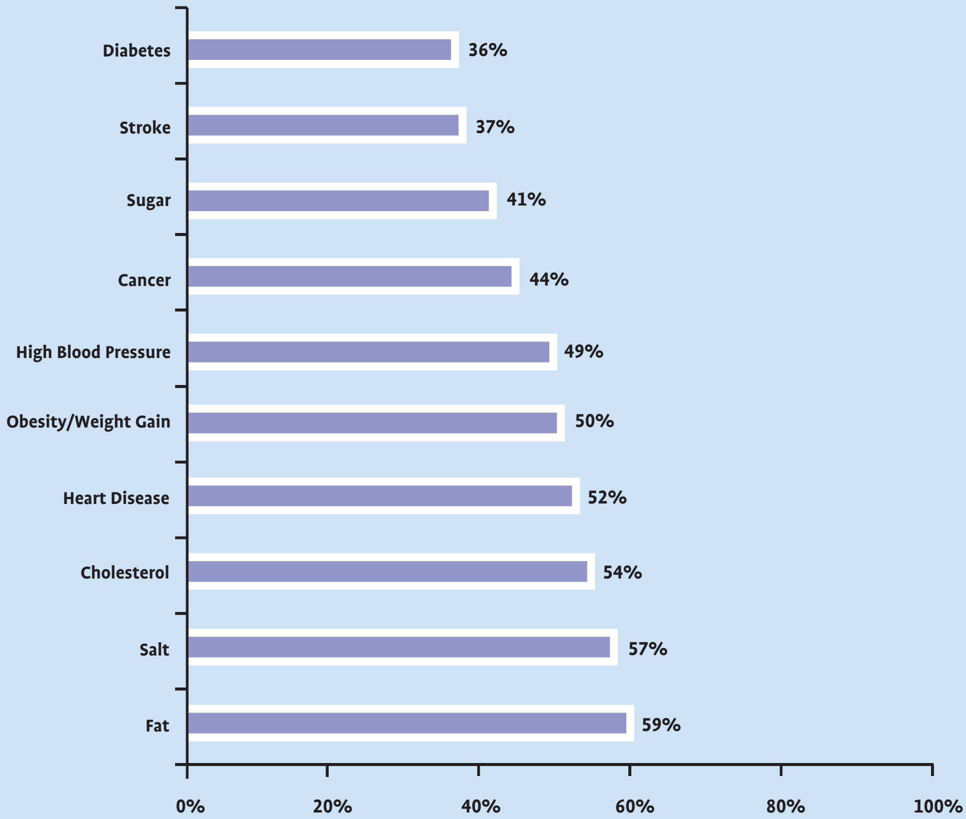
CHART 1(vi) TOP 5 HEALTHY EATING ESSUES MOST CONCERNED ABOUT (UNPROMPTED)



Base: 816

At a prompted level, the healthy eating issue that consumers were most concerned followed a similar pattern to responses at an unprompted level, with “Fat”, “Salt” and “Cholesterol” again in the top three. Those most concerned about the various healthy eating issues tended to be skewed towards the AB social class groups.

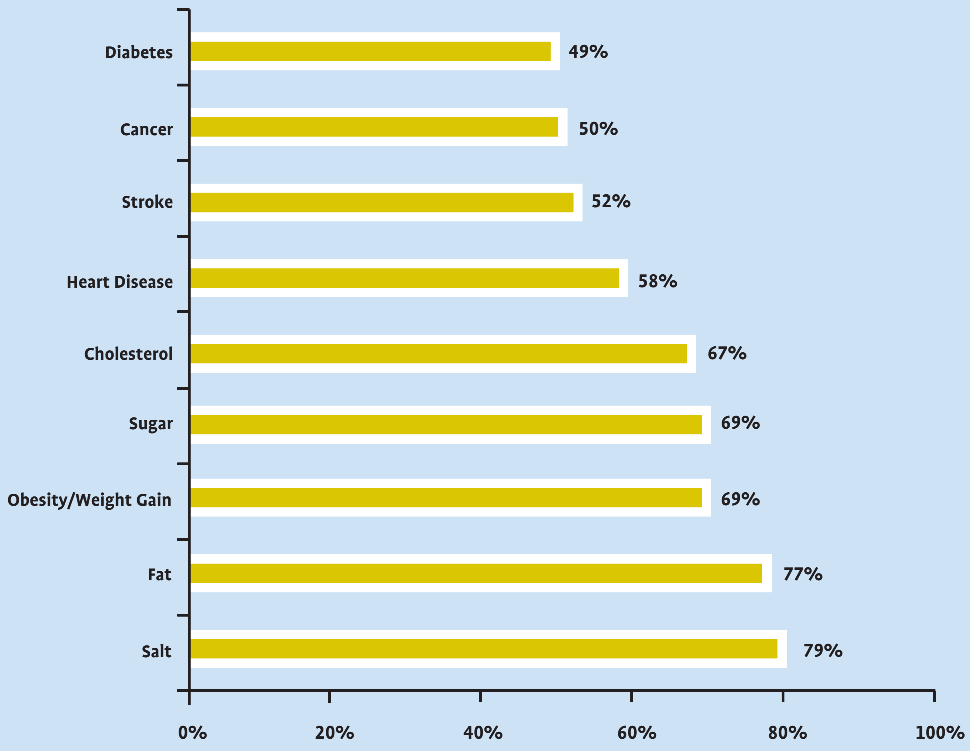
CHART 1(vii) CONCERNS ABOUT HEALTHY EATING ISSUES (PROMPTED)



Base: 816

Participants were next asked whether their eating habits were affected by these concerns. Almost 4 in 5 (79%) who were concerned about salt in their diet said that their eating habits were affected by these concerns. The chart below presents an overview of the impact of the concerns on individual's eating habits.

CHART 1(viii) THOSE WHOSE EATING HABITS ARE AFFECTED BY THE FOLLOWING CONCERNS



Base: Those that were concerned about each Healthy Eating issue

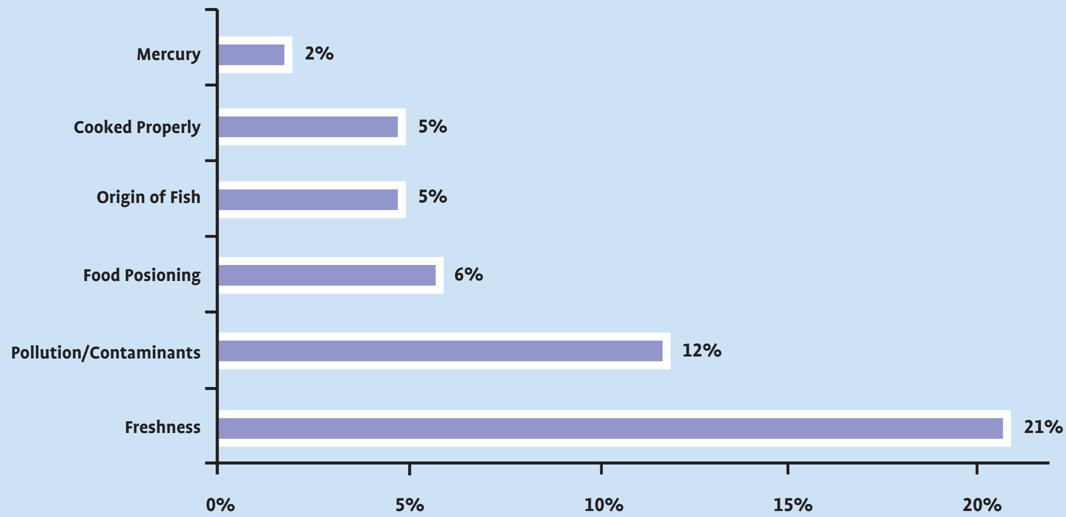
Looking at the food issues participants would like to find out more about, the top three responses were fat (15%), salt (15%) and obesity/weight gain (13%). Those aged 65-74 year olds were most likely to state that they would like to find out more about salt, suggesting that the effect of salt on health is deemed by the public. Females were also more likely than males to state that they would like to find out more about obesity/weight gain. Those of the total population of the research under 35 were also more likely to state this to be a problem in later years.

Fish and Shellfish

While a number of contemporary healthy eating issues were explored, particular emphasis was paid in this wave of research to fish and shellfish production, preparation and consumption, as this is the focus of the next food to be examined under ***safe*food's** consumer focused review programme.

Firstly, at an impromptu level, participants were asked about some of the key concerns they have regarding fish and shellfish production, preparation and consumption. Not surprisingly, "freshness" is the number one concern, for most consumers, which is a prerequisite for consuming seafood, as it has a very short shelf life and is better and safer the fresher it is.

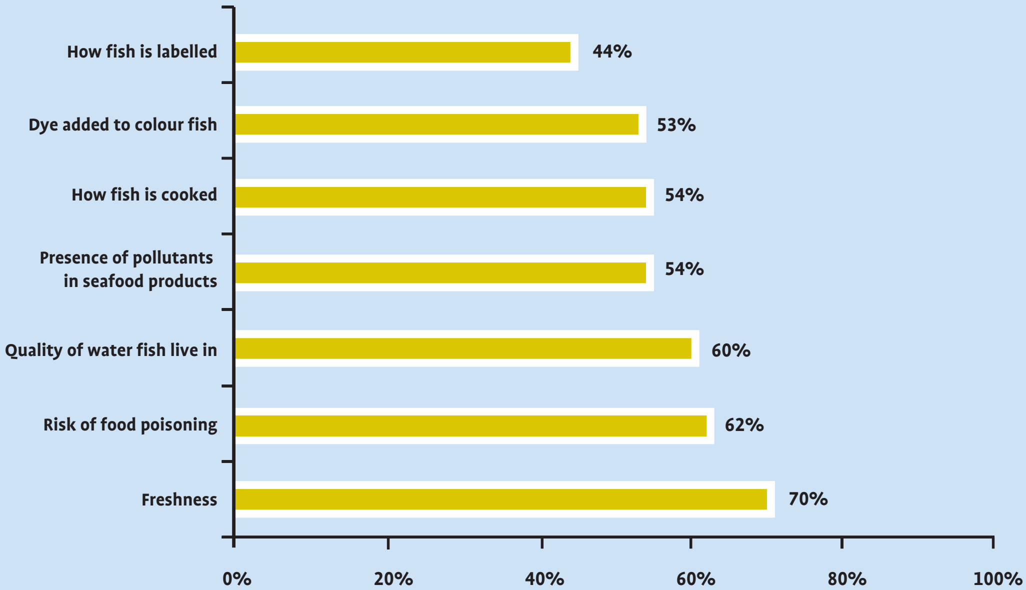
CHART 1(ix) ISSUE MOST CONCERNED ABOUT REGARDING FISH & SHELLFISH PRODUCTION, PREPARATION & CONSUMPTION (UNPROMPTED) – TOP 6



Base: 816

Consumers were next asked to indicate their level of concern at a prompted level towards a number of issues affecting the quality of seafood. Freshness again tops the list, as do pollutants and water quality which would appear to be intrinsic to the overall quality and safety of seafood as opposed to issues like "farmed fish" (31%) or how the fish is packaged (37%).

CHART 1(X) ISSUE MOST CONCERNED ABOUT REGARDING FISH & SHELLFISH PRODUCTION, PREPARATION & CONSUMPTION (PROMPTED) – TOP 6



Base: 816

Consumers are most likely to trust their nose when buying fish or shellfish, with nearly 7 in 10 stating that they would use "fresh smelling" to assure them of safety when purchasing seafood. Just under 6 in 10 would use a "local fishmonger" to assure them of safety with just over half using "quality assurance schemes".

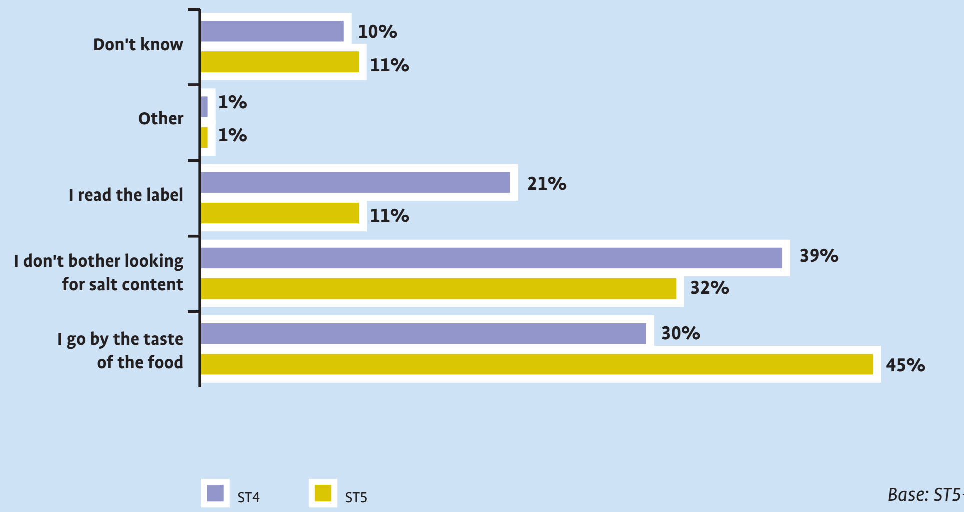
2. Nutrition

This section begins by exploring how consumers on the island of Ireland use salt in their day to day lives and how they believe they can reduce the levels of salt they currently consume as part of healthy diet. The issue of fat is explored next with consumers awareness of "good" and "bad" fats probed and analysed. Consumption of meat products is next investigated, with particular emphasis paid to consumers cooking behaviour. Finally, building on some of the themes explored in section 1, the consumption behaviour of fish is explored.

Salt Consumption

It is encouraging to see that consumers on the island of Ireland are now more likely to read the label when assessing salt content in food than the traditional method of going by the "taste" of the food. It could be argued that ***safefood's*** salt advertising already had an impact in just six months. This change in behaviour has been more significant in the Republic of Ireland than Northern Ireland, with a worrying increase in the number in Northern Ireland stating that they "don't bother looking for salt content".

CHART 2(i) HOW DO YOU KNOW THE AMOUNT OF SALT A FOOD HAS BEFORE IT IS EATEN (UNPROMPTED)

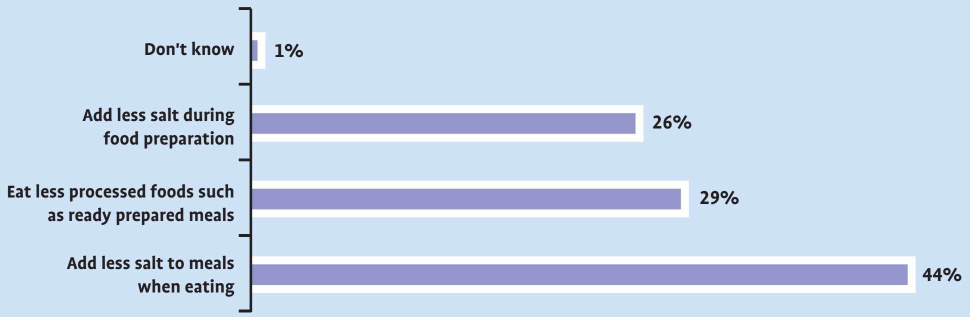


Base: ST5–816, ST4–819

Those consumers that read the label were asked how they established the actual level of salt a food contained, at an unprompted level. It would appear that the ability of consumers to correctly source salt content on food packaging could be low, with less than 1 in 3 stating they would look for grams of salt (22%) or sodium content (12%). Just under half stated they would read the label, but did not provide specific information on how they could source salt levels.

Respondents were next asked to recommend effective ways of cutting down on salt. The majority believed that salt intake levels could be controlled by reducing the salt they add when eating (44%) with very few having "no opinion" on the matter, suggesting that awareness of salt and its implications on health have grown significantly.

CHART 2(ii) WHAT IS THE MOST EFFECTIVE WAY FOR PEOPLE TO CUT DOWN ON SALT (PROMPTED)



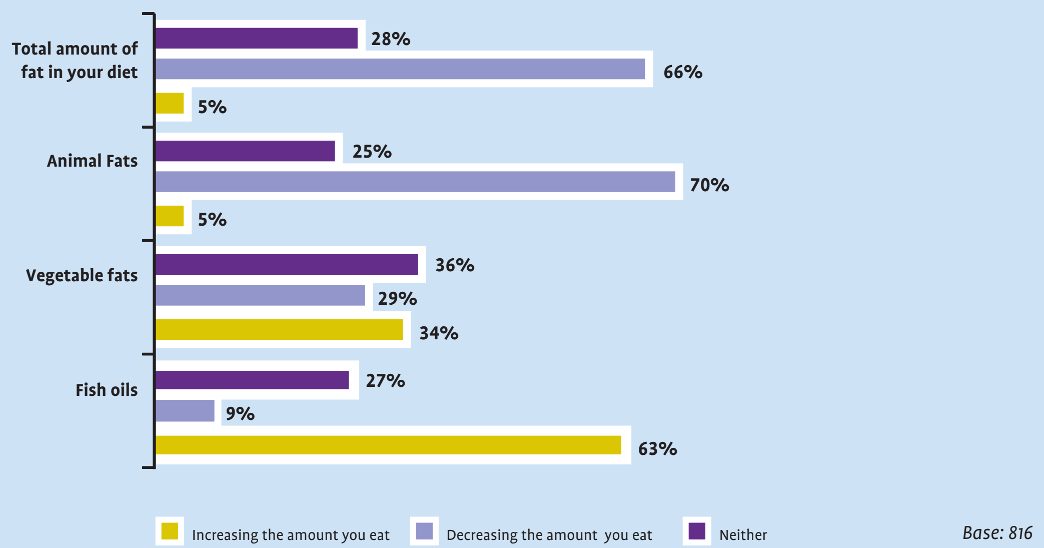
Base: 816

Fat Consumption

It would appear that the growing interest in health and diet has helped educate consumers on “good” and “bad” fats, with six in ten consumers correctly stating that a diet should contain a healthy amount of fat. It is clear that most consumers have come to realise that certain fats are essential for proper function and health, however, awareness of this fact tends to be skewed towards females and younger consumers.

Of those that believed a diet can contain a healthy amount of fat, just under 3 in 4 believed that their diet contained the right amount of healthy fat. However, there is low awareness of the correct types of healthy fat to consume as part of healthy diet, with only half stating they were aware. To explore how accurately those who stated they were aware of the correct types of fat they should consume were, they were asked whether they should be increasing or decreasing the types of fat in Chart 2.3 below. For all fat types under review, most participants were able to correctly judge whether they should increase or decrease intake.

CHART 2(iii) WHAT DO YOU THINK YOU SHOULD BE DOING ABOUT THE FOLLOWING TYPES OF FAT (PROMPTED)



Respondents were next asked to establish from a list of fat types, the ones they deemed to be “good “and “bad” fats.

TABLE 2(i) WHICH OF THE FOLLOWING RATES ARE GOOD AND WHICH ARE BAD?

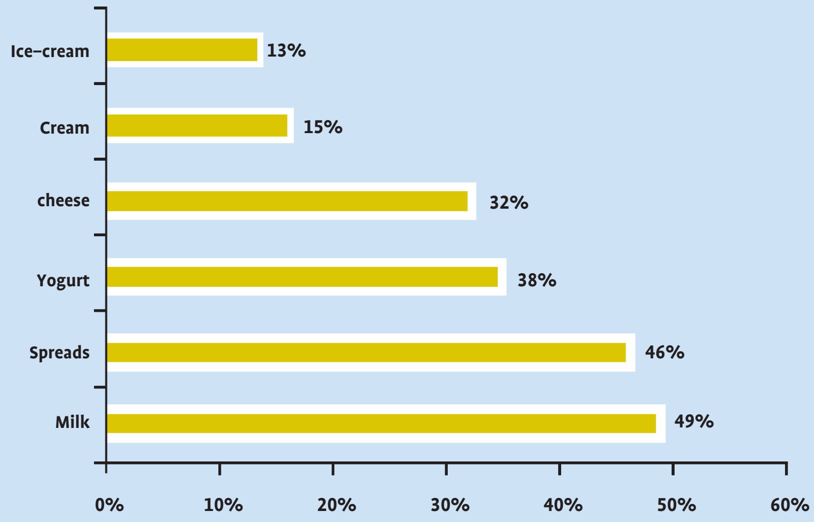
Type of Fat	Good	Bad	DK
Omega-3 Oils	71%	5%	24%
Omega 6 Oils	63%	5%	32%
Vegetable Fat	50%	23%	27%
Polyunsaturated fat	38%	20%	42%
Monounsaturated fat	18%	29%	53%
Trans fats	7%	26%	66%
Cholesterol in foods	7%	73%	20%
Hydrogenated fat	6%	31%	63%
Animal fats	6%	70%	25%
Saturated fat	5%	60%	35%
Bases	816		

Again, it is clear that most consumers are able to correctly distinguish between “good” and “bad” fats. However, consumers are more likely to be unsure about certain bad fats, such as “trans fats” and “hydrogenated fat”, with 2 in 3 not knowing whether these are good or otherwise. More education may be needed in this space to inform consumers what effects these fats can have on health and the foods that possess them.

Dairy Consumption

Nearly half or Irish consumers now choose low fat options when consuming milk and spreads, however, it would seem that most still prefer full fat varieties when choosing “indulgent” products such as ice-cream and cream. Unsurprisingly, females and middle aged consumers appear to be much more likely to consume dairy products that have reduced fat content.

CHART 2 (iv) THOSE THAT CHOOSE LOWER FAT VARIETIES IN THE FOLLOWING DAIRY PRODUCTS (PROMPTED)



Base: 816

Meat Consumption

Approximately 98% of the Irish population consume meat on a regular basis. When buying meat, 2 in 3 consumers would appear to prefer to opt for leaner cuts. This tends to be higher in the Republic of Ireland (68%) than in the Northern Ireland (52%), suggesting that consumers in the Republic may be more concerned about healthy eating matters.

TABLE 2(ii) WHEN COOKING FRESH MEAT DO YOU DO ANY OF THE FOLLOWING ON A REGULAR BASIS

	IOI	ROI	NI
Trim excess fat from the meat	57%	59%	52%
Remove the skin from the meat	41%	44%	34%
Cook the meat by roasting it	65%	68%	57%
Cook the meat by grilling it	73%	76%	66%
Cook the meat by boiling it	46%	56%	21%
Cook the meat by frying it	43%	46%	36%
Base:	816	503	313

While Ireland is an island of meat eaters, given our strong heritage in agriculture and in particular cattle production, it is interesting to find that less than 1 in 10 consumers eat fresh meat everyday. While historically, economic circumstances would have curbed consumption of meat, it could be argued that the health benefits of eating for example, less red meat, may explain this figure. It is also interesting to note the diversity in consumption behaviour between Northern Ireland and the Republic of Ireland, with those in the ROI more likely to eat fresh meat regularly, while those in Northern Ireland are more likely to consume cured meats.

Table 2(iii) When cooking fresh meat do you do any of the following on a regular basis?

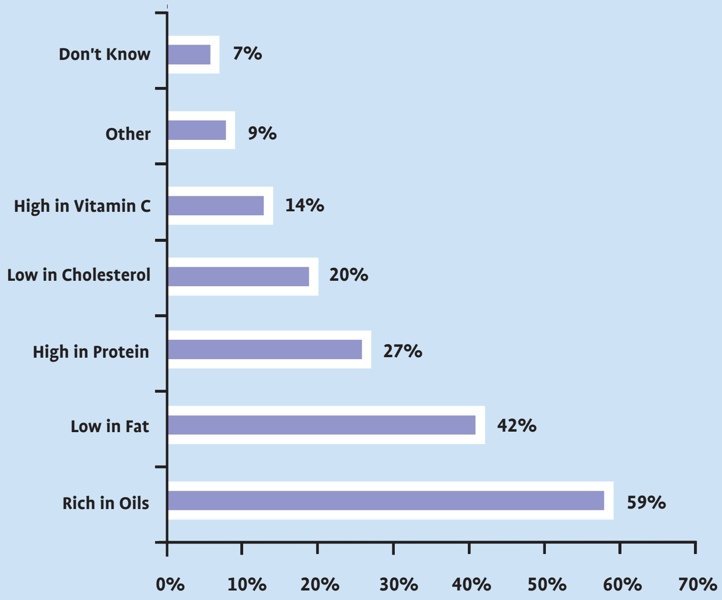
IOI						
	Everyday	**3 to 5 times a week**	**Once a week**	**Couple of times a month**	**Once a month**	**Never**
Fresh meat	**7%**	**49%**	**28%**	**9%**	**3%**	**3%**
Meat that has been coated	**0%**	**8%**	**27%**	**19%**	**14%**	**33%**
Cured meats	**4%**	**29%**	**37%**	**15%**	**9%**	**6%**
Meat products	**2%**	**27%**	**36%**	**16%**	**7%**	**11%**
Meat in a ready meal	**0%**	**6%**	**17%**	**15%**	**17%**	**45%**
Base:				816		

Fish Consumption

Consumption of fish appears to be quite high, with just under 1 in 2 consumers claiming to eat fish at least once a week. Just less than 1 in 5 never eats fish. Most consumers would seem to have a preference for fresh white fish (more than 4 in 10 eat it at least once a week), although consumption of fresh oily fish should potentially be higher (under 1 in 5 eat it at least once a week), given its proven health benefits.

Unsurprisingly, considering the amount of promotion fish has received as a healthy food, more than 9 in 10 consumers believe it is a healthy food, with 9% stating they didn't know (most likely to be young males). Most consumers also tend to have a high awareness of the specific health benefits of eating fish, with its Omega oils and low fat content given as key examples of its fit with a healthy diet.

CHART 2(V) WHY FISH IS PERCEIVED TO BE A HEALTHY FOOD (UNPROMPTED)



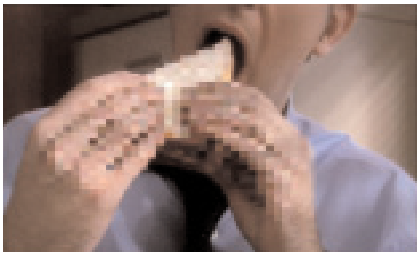
Base: 816

3. Advertising Awareness & Effectiveness

***safe*food** employ a diverse range of communication strategies to help educate the general public about food safety. This year has seen ***safe*food** extend its remit to include the promotion of healthy eating. Three media channels were used to communicate ***safe*food's** key messages during the last six months. Television advertising was used to promote the food hygiene message through the office and kitchen commercials, while radio and newspaper advertising was used to communicate the need to reduce salt intake.

There were three principal objectives of this phase of the research. Firstly, to establish the awareness consumers across the island have of ***safe*food's** advertising, secondly to establish how effective the advertising was in terms of messages recalled by consumers, and thirdly the ability of the advertising campaigns to positively affect consumer behaviour.

Kitchen



Office

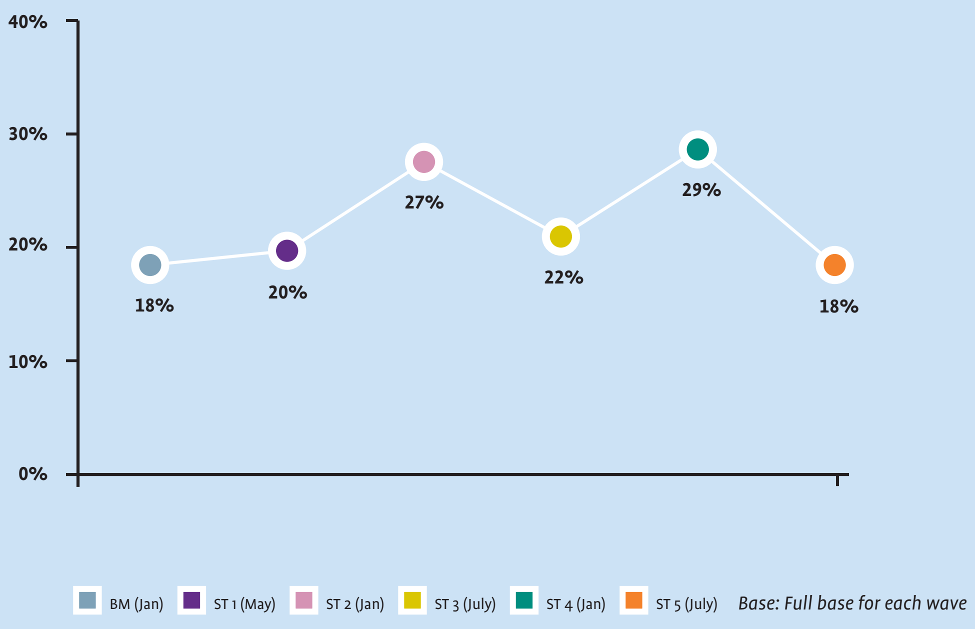
Salt

Advertising Awareness

Respondents were asked to state the organisations they had seen advertising on TV over the last six months about food safety. ***safefood*** was the organisation/company that was seen/heard the most by the respondents, with almost 1 in 5 (18%) mentioning it at an unprompted level, with the Department of Health (13%) and Bord Bia (7%) also in the top three. Females were more likely than males to mention that they had seen/heard the ***safefood*** TV advertising in the last six months (22% of females compared to 14% of males mentioned ***safefood***), which follows historical trends for subsequent waves

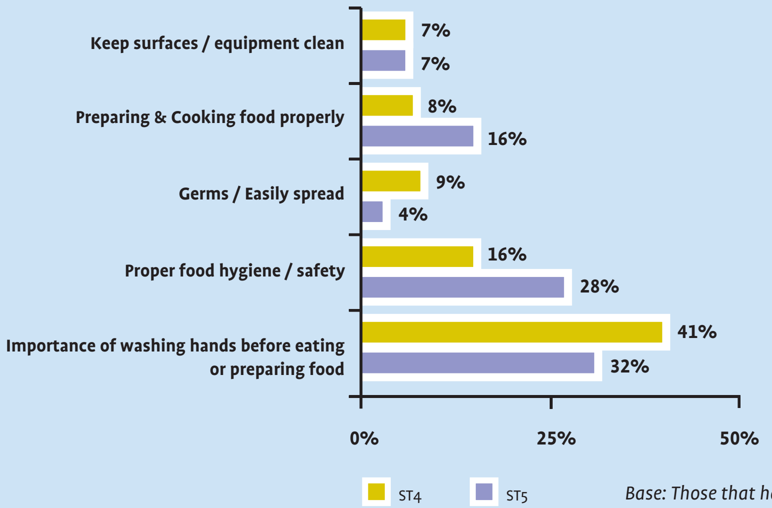
While ***safefood*** was the organisation that respondents were most likely to mention at an unprompted level, there has been a decrease of 11% of those who spontaneously stated safe food since safetrak 4. This drop can potentially be explained by two specific factors. Firstly, ***safefood*** had reduced its "advertising weight", meaning that the repetition of advertising was lower than in previous waves and secondly, ***safefood*** has historically seen a dip in advertising recall during summer months, when consumers typically tend to watch less television due to fine weather or travel etc. Chart 3.1 clearly illustrates this trend.

CHART 3(i) AWARENESS OF *safefood* TV ADVERTISING (UNPROMPTED)



Participants were asked to state the main message(s) they believed was being communicated by the advertisements they were aware of. Not surprisingly, given the higher recall of TV ads, messages deemed to be associated with the Kitchen and Office commercials make up the Top 5. However, the ongoing development of a healthy eating TV commercial is likely to help the healthy eating messages breaking into the Top 5 in future research.

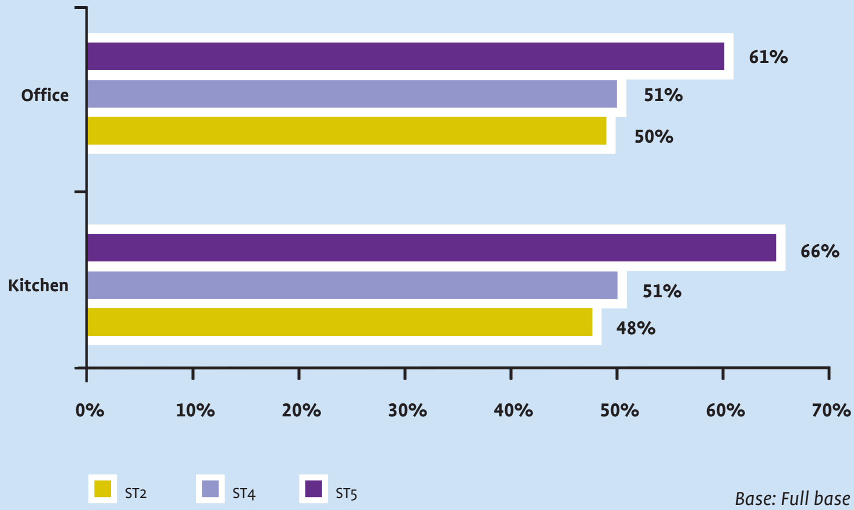
Chart 3(ii) Key messages being convayed by safefood advertising (Unprompted)



*Base: Those that have seen/heard safe**food** advertising*

When presented with showcards of the Kitchen and Office television commercials, 66% of respondents reported that they recalled having seen "Kitchen", while 61% reported seeing the "Office" ad, reaching their highest level of recall since launch.

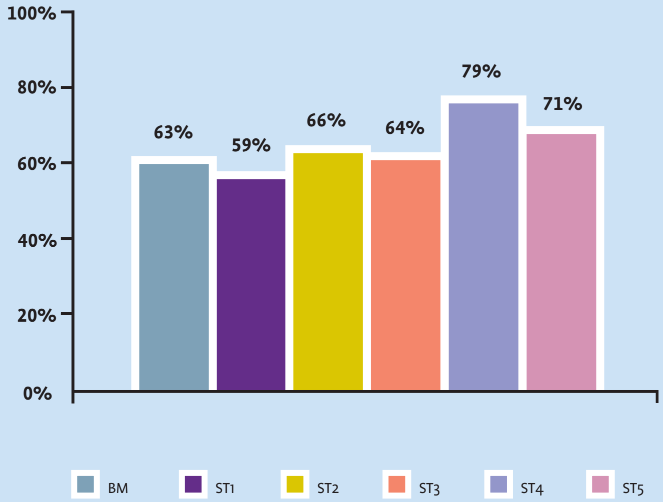
Chart 3(iii) Those that recall seeing the following TV commercials - (Prompted)



Base: Full base for each wave

While awareness of these two TV commercials is high, most likely driven by consumers' exposure to them periodically since January 2004, those recalling at least one of the TV commercials has dipped slightly in the last six months, which may be attributed to a reduction in advertising weight.

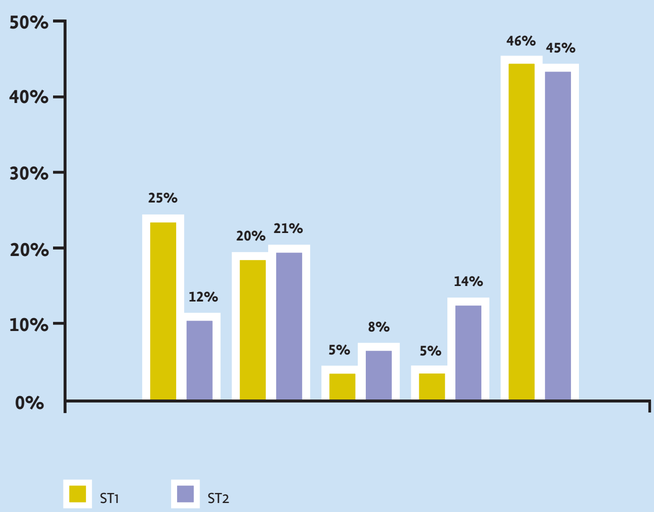
CHART 3(iii) THOSE THAT RECALL SEEING ANY TV COMMERCIALS - (PROMPTED)



Base: Aware of at least one TV commercial

Respondents were next asked whether they remembered the organisation/company that was involved in these advertisements at an unprompted level. Half of respondents attributed the commercials to either ***safefood*** or the Food Safety Promotion Board, or a combination of the two.

CHART 3(iv) THE ORGANISATION / COMPANY THAT THE TV COMMERCIALS WERE ATTRIBUTED TO (UNPROMPTED)



Base: Aware of at least one Advertisement

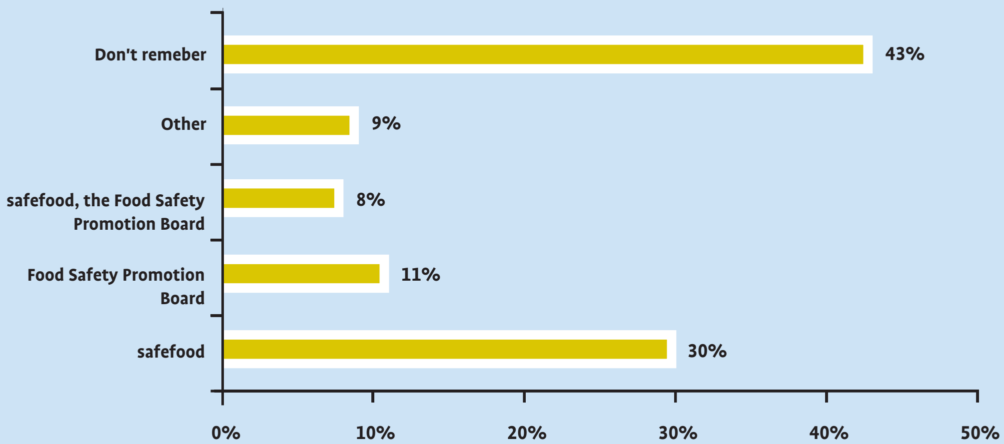
Once prompted, more than 3 in 4 of those that remembered the ads believed they were for ***safefood***, the highest prompted awareness for any of ***safefood's*** commercials since research began.

Attention was next turned to radio advertising, which warned consumers about the amount of salt currently in some of the foods they eat on a regular basis. Respondents were first asked to look at the transcript of the radio advertisement, with the name of the organisation involved deleted. At an unprompted level, less than 3 in 10 (28%) consumers could recall hearing the advertisement. Those most likely to recall this ad tended to be female and over 50 years of age, suggesting that older consumers may be more likely to mentally "tune into" messages regarding salt and its affect on health.

Those aware of the radio ad were next asked to state the organisation or company they believed were involved in the commercial. Similar to TV advertising awareness, 1 in 2 consumers attributed the ad to ***safefood*** and / or the Food Safety Promotion Board, or a combination of the two. At a prompted level just under 7 in 10 were aware of ***safefood's*** involvement in the ads.

Finally, awareness of ***safefood's*** newspaper ad, describing the link between heart disease and salt was explored. Just over 1 in 5 consumers were aware of this ad at an unprompted level. Similar to TV and Radio, 1 in 2 consumers correctly attributed the ad to ***safefood*** or Food Safety Promotion Board or a combination of the two. At a prompted level, more than 7 in 10 of those who remembered seeing the ad attributed it to ***safefood***.

CHART 3(V) THE ORGANISATION / COMPANY THE RADIO COMMERCIAL WAS ATTRUTED TO (UNPROMPTED)

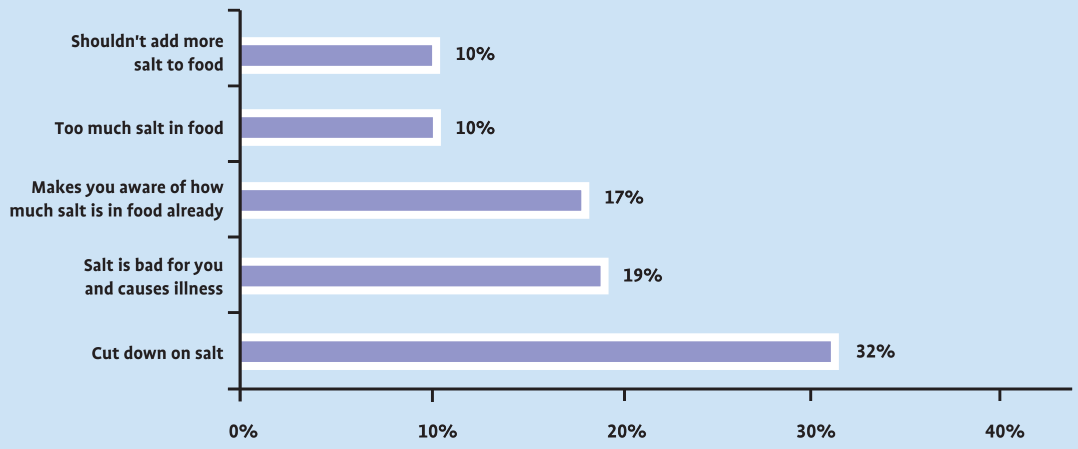


Base: 217

Message Recall

In addition to measuring recall of the various ***safe*food** communications, the messages that are recalled from the advertisements were also investigated. This wave of research focused on establishing the message recalled by ***safe*food's** new advertisements in the "healthy eating" space. Those who were aware of hearing the "Salt" radio commercial were asked what specific messages they could recall unprompted. Just under 1 in 3 consumers believed the main message of this commercial was to cut down on salt.

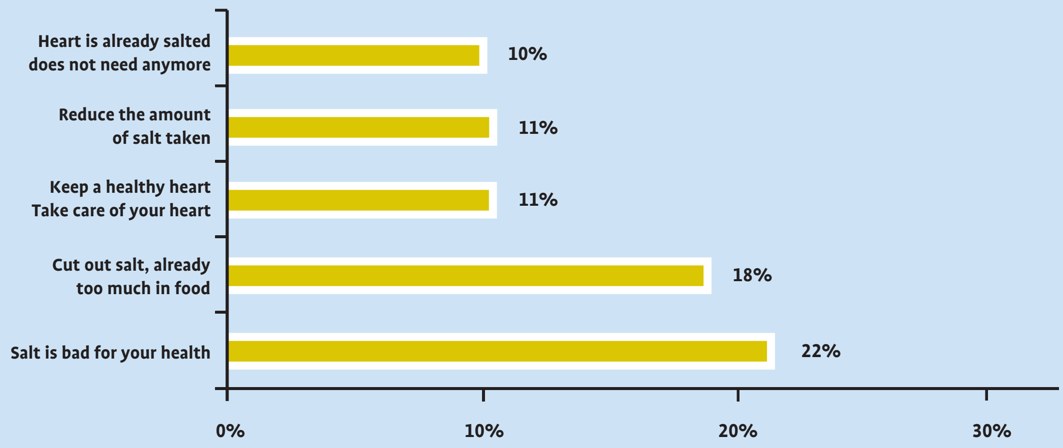
CHART 3(vi) MAIN MESSAGE COMMUNICATED BY SALT (RADIO) COMMERCIALS (UNPROMPTED)



Base: 217

Those respondents that recalled seeing/reading the "heart" newspaper ad were then asked what they believed were the main messages communicated by this commercial. Just over 1 in 5 felt the ad communicated that salt was bad for your heart. It would appear that both the radio and newspaper ads were perceived to have communicated similar types of message, with most consumers taking "general" as opposed to "specific" information from the communications programme.

CHART 3(vii) MAIN MESSAGE COMMUNICATED BY HEART (NEWSPAPER) COMMERCIALS (UNPROMPTED)



Advertising Effectiveness

Respondents were next asked how effectively they believed the ***safe*food** "Salt" and "Heart" commercials were at communicating a number of predefined criteria. Both commercials were assessed on the exact same criteria as outlined below.

TABLE 3(i) THOSE THAT RATED THE SALT AND HEART ADS AS VERY GOOD AT THE FOLLOWING

	Salt Radio ad	Heart Newspaper ad
Informing you about the large amount of salt in processed food	78%	75%
Making you aware that there is too much salt in your diet	77%	74%
Encouraging you to cut down on salt	77%	75%
Getting the point across in a clear way	75%	71%
Encouraging you to eat more fresh food	73%	73%
Making you red food labels more closely	70%	67%
Really capturing your interest	70%	70%
Delivering a message of relevance to you	70%	70%
Being hard hitting	67%	74%
Telling you something you didn't already know	62%	61%
Base:	812	

It is clear from the findings in Table 4.1 that radio has proved to be a marginally better communications tool than newspapers. However, in terms of "Being Hard hitting", the newspaper is seen as being more effective channel due to the stark visual of a human heart being used. As with previous advertising effectiveness measures consumers in Northern Ireland are less likely to rank the attitudes above as strongly as consumers in the Republic of Ireland. There may be a number of societal issues at play here (i.e. life post the Good Friday Agreement etc), coupled with the large amount of public service advertising, which may have diluted the relevance of the advertising in Northern Ireland.

Influencing Behaviour

Social marketing, as conducted by bodies such as ***safefood***, is a process whereby marketing strategies are developed to influence and change human behaviour on a large scale. One of the many benefits of social marketing is that society derives the benefits rather than a specific sector or brand. Social marketing tools can often help increase participation and retention, and can facilitate health and other behavioural / perceptual changes.

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

It is very encouraging to see that 1 in 5 consumers have claimed to have changed their behaviour as a result of this new campaign, with nearly 1 in 3 stating that they plan to change behaviour going forward. It is likely that further advertising in this space will increase the number of consumers who will re-evaluate the role salt plays in their diet, with long term benefits for the island's health.

TABLE 3(ii) ABILITY OF ADVERTISING TO AFFECT BEHAVIOUR

Statements	**ST5**
"It made me think more about the amount of salt I eat and I have already changed my behaviour as a result of the ad"	**20%**
" It made me think more about the amount of salt I eat and I plan to change my behaviour as a result of the ad"	**31%**
"It made me think more about the amount of salt I eat and I plan to find out more about this issue in the near future"	**21%**
" It made me think more about the amount of salt I eat (but) it is unlikely I will look into this issue at some stage"	**14%**
Don't know	**14%**
Base:	811

It is important to note that those who have already changed their behaviour tend to be older consumers, with less than 1 in 10 15-24 years olds reducing salt intake because of the ad. However, it is encouraging to see that those planning to change their behaviour are most likely to be aged 25-34 (just under 4 in 10) suggesting that younger consumers are thinking about salt consumption in a serious way, which may reduce health related problems in the years to come. The challenge for ***safefood*** is to continue to work towards driving good intentions into sustained behaviour.

4. Sources of Information and Perceptions of Responsibility

This section deals with the public's perception of and identification with key sources of information around food safety and healthy eating.

Sources of Information on Food Safety

Participants were first asked, at an unprompted level, to name the best organisation or company for making consumers think more seriously about food safety. The Department of Health was the organisation that was cited the most often, by just under 1 in 5 participants. safefood was mentioned by 16% of respondents. While this figure has not changed since safetrak 4, both the Department of Health and Bord Bia have increased since the last wave. The table below illustrates the developments.

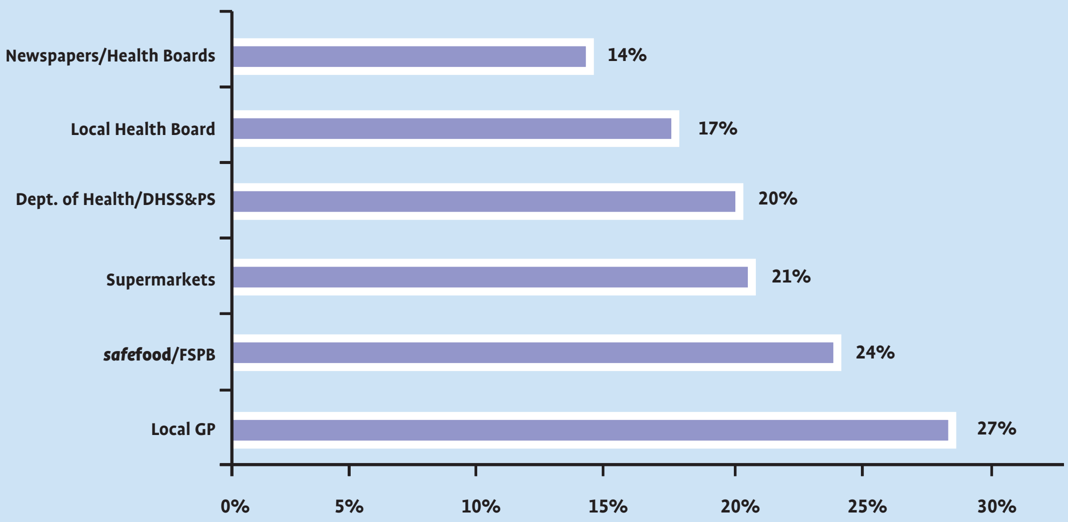
TABLE 4(i) BEST COMPANY / ORGANISATION FOR MAKING CONSUMERS THINK MORE SERIOUSLY ABOUT FOOD SAFETY (UPROMPTED) – TOP 6

	IOS ST BM	IOS ST 1	IOS ST 2	IOS ST 3	IOS ST 4	IOS ST 5
Department of Health	20%	20%	14%	20%	16%	18%
safefood	0%	12%	18%	12%	16%	16%
Bord Bia	14%	12%	10%	11%	10%	14%
Health Boards	6%	7%	4%	8%	8%	9%
Government	2%	2%	2%	4%	2%	5%
Food Safety Authority	10%	5%	2%	2%	7%	3%
Base:	573	532	478	490	819	460

From the table, the relative success of ***safefood*** is apparent. While the Department of Health and Bord Bia have grown their levels of spontaneous awareness, safefood's rate of growth has been very strong, from 4% at benchmarking to a peak of 18% for wave 2, continuing to score consistently well over the last 12 months. Both Bord Bia and safefood experienced a decline during wave 3, while the Department of Health was cited by 1 in 5 (20%) as the best organisation for making consumers think about food safety. There are contextual factors to be considered however. The introduction of the smoking ban in March 2004 instigated a wide media focus on the Department of Heath. It is reasonable to suggest that the Department of Health was therefore seen as the key player in health-related matters, including food safety at the time.

Respondents were asked to state the company or organisation they would consider to be a general source of information about healthy eating. This question was asked at an unprompted level. The local GP came out on top with just under 3 in 10 choosing their local doctor, with ***safefood*** performing very strongly in second place, with just under 1 in 4. This strong position is testimony to the effectiveness of the healthy eating campaign driven by ***safefood*** over the last six months.

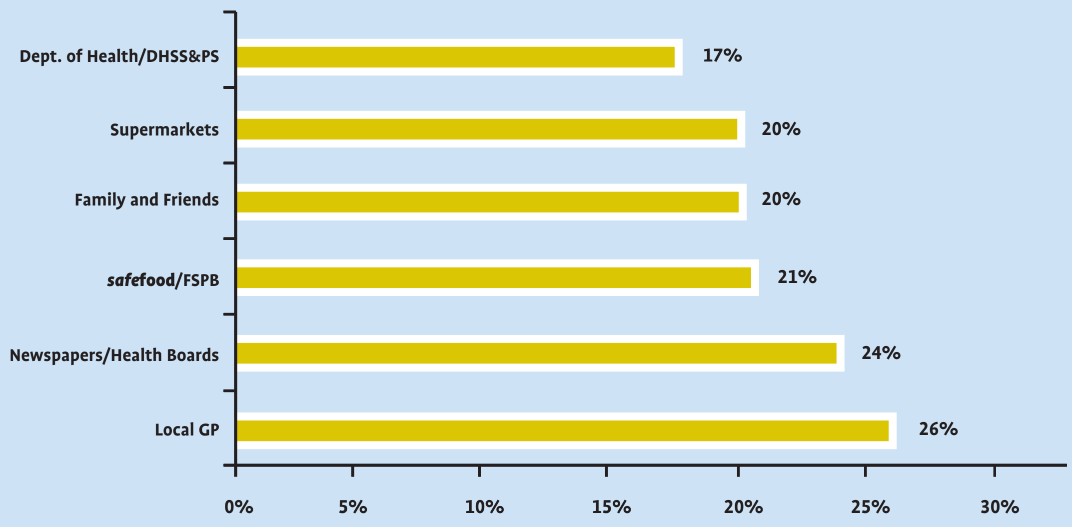
CHART 4(i) GENERAL SOURCE OF INFORMATION ON HEALTHY EATING (UNPROMPTED) – TOP 6



Base: 811

The age group most likely to mention ***safefood*** as a general source of information on healthy eating were 35-49 year olds. ABC1s constituted almost half of those who mentioned ***safefood***. From the table, the relative success of safefood is apparent. While the Department of Health and Bord Bia have grown their levels of spontaneous awareness, ***safefood's*** rate of growth has been very strong, from 4% at benchmarking to a peak of 18% for wave 2, continuing to score consistently well over the last 12 months. Both Bord Bia and ***safefood*** experienced a decline during wave 3, while the Department of Health was cited by 1 in 5 (20%) as the best organisation for making consumers think about food safety. There are contextual factors to be considered however. The introduction of the smoking ban in March 2004 instigated a wide media focus on the Department of Heath. It is reasonable to suggest that the Department of Health was therefore seen as the key player in health-related matters, including food safety at the time.

CHART 4(ii) SOURCES USED TO GET INFORMATION ON HEALTHY EATING (PROMPTED) – TOP 6



Base: 811

Turning next to the possible sources of information on healthy eating where consumers actually get information, the Local GP again comes out most strongly, with 4 in 10 using their Doctor as a source. It is interesting to see Newspapers and Magazines score highly as the second most important source of information, highlighting how consumers are increasingly using their own judgement and research as sources of information, compared to conventional channels.

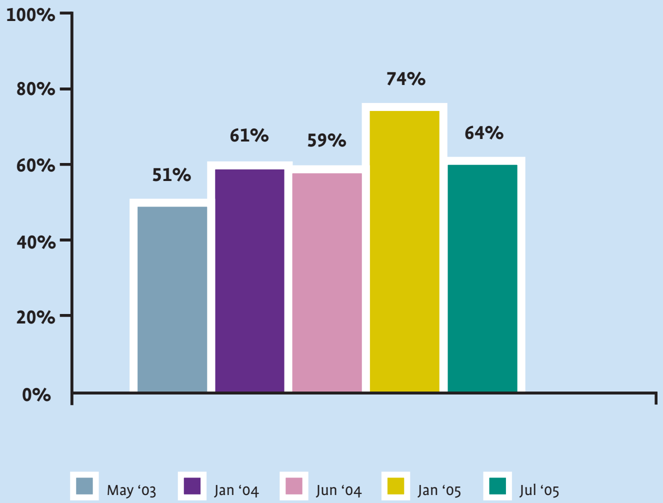
5. The safefood Brand

This final section looks at how recognition of the ***safefood*** brand has evolved since May 2003 and how the wider public views ***safefood*** as an organisation.

safefood Logo Recognition

While recognition of the ***safefood*** logo peaked during ***safe*****trak 4**, with almost 3 in 4 aware of the logo, there has been a dip in awareness levels over the last 6 months. This may be explained by a reduction in advertising weighting, coupled with the new focus given to healthy eating, which may have caused some perceptual readjustment.

CHART 5(i) THOSE THAT RECOGNISE THE *safefood* LOGO



Base: Full base for each wave

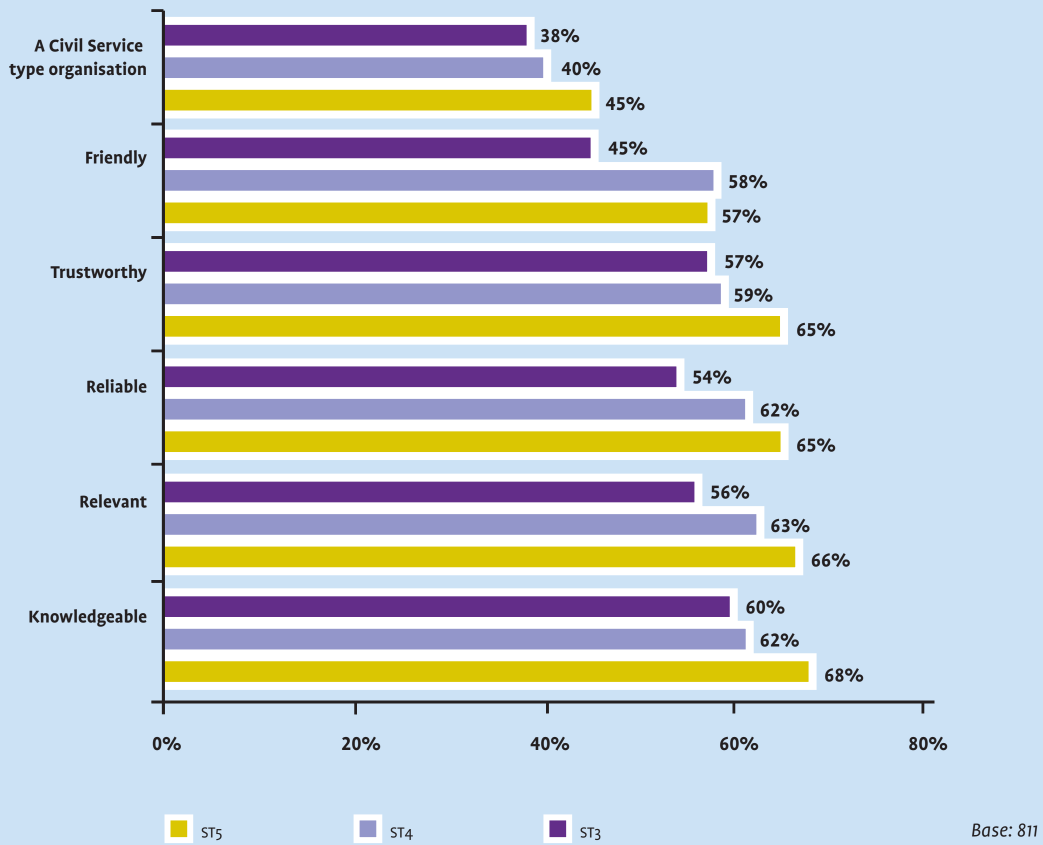
Females are significantly more likely than males to recognise the ***safefood*** logo, with more than 7 out of 10 (71%) of females recognising the logo, compared to 57% of males. Furthermore, those in the 25-34 year age category (more than 7 in 10) were also significantly more likely to recognise the ***safefood*** logo.

There were also regional differences in terms of logo recognition. In the Republic of Ireland, 68% recognised the logo, versus 56% in Northern Ireland. Again, this follows historical trends.

safefood: Attitudes and Perceptions of Consumers towards the Organisation

The experience consumers have of ***safefood*** as an organisation was also evaluated based on either their direct dealing with the organisation and/ or through advertising. Respondents were presented with a list of characteristics which ***safefood*** might represent and were asked how they would evaluate the organisation in this context. ***safefood*** continues to grow in a positive direction, which is testimony to their consumer facing qualities.

*CHART 5(ii) CONSUMER'S EXPERIENCE OF **safefood** (PROMPTED)*



Finally, a number of new development statements were explored, to assess how effectively consumers believe ***safe*food** has performed in creating awareness of healthy eating. Considering that ***safe*food** has only been advertising the healthy eating message for approximately six months, the results appear to be extremely positive, with 7 in 10 believing ***safe*food** provides good advice on healthy eating and is responsive to consumers concerns.

However, once again, consumers in Northern Ireland are not as positive towards ***safe*food** as those in the Republic of Ireland. This can be attributed to a number of different factors such as the dominance of a non-commercial TV and Radio station (BBC NI) limiting opportunities to use a key channel. The plethora of state and semi-state communication programmes, which may have fostered a greater sense of scepticism compared to the Republic of Ireland may also be attributing factors.

7. Conclusion

This latest wave of research, the sixth since January 2003 highlighted a number of interesting findings and developments for ***safe*food**. While ***safe*food's** brief has traditionally focused on food safety and hygiene, this latest wave of research also evaluated the effectiveness of ***safe*food's** healthy eating communications programme. This new departure may have caused some initial confusion in the mindset of consumers, who are re-orientating their thinking towards ***safe*food** as a source of information on both food hygiene & safety as well as healthy eating.

It is interesting to find that consumers' concerns regarding food safety issues have dropped to their lowest levels since June 2003. The reason for this is unclear, but it could be argued that the growing number of consumers who have actually changed behaviour due to ***safe*food** advertising has helped increase personal responsibility and thus eased concern. However, consumers still appear to be more concerned about food safety issues (2 in 3 concerned) compared to healthy eating concerns (just under 6 in 10). Those most likely to be concerned about healthy eating were predominantly female and aged 25 to 34, with those least likely to be concerned, male and under 24 years of age. Consumers' key concerns in terms of healthy eating tend to revolve around fats and salt, suggesting that ***safe*food's** advertising in this space is both timely and relevant, given the increasing levels of obesity and heart disease on the island. However, consumers' awareness of "good" and "bad" fats appears to be relatively high; however, there tends to be confusion surrounding some types of fats, in particular bad fats such as Trans fats and Hydrogenated fats.

In terms of advertising awareness and effectiveness, two distinct subject matters were communicated by ***safe*food** over the last six months, namely food hygiene and healthy eating. This wave has seen a sharp decrease in those aware of ***safe*food's** advertising on TV, which can be seen as both a function of reduced advertising weighting and seasonal factors. However, ***safe*food** still remains the leading organisation consumers remember advertising in this space at both at a spontaneous and prompted level. ***safe*food** also emerges as the number one organisation consumers recalled advertising "healthy eating" on both radio and in newspapers, both a prompted and unprompted level, suggesting the organisation already has ownership of this message. The creation of TV commercials in the healthy eating space is likely to increase awareness levels for this message, as experienced by previous safefood TV campaigns for food safety and hygiene.

Those consumers that could recall ***safe*food's** "salt" and "heart" ads, believed both commercials communicated similar messages, namely the importance of "reducing salt in the diet" and that "salt was bad for your health". While the intended message may have been more complex i.e. much of the food you eat already contains too much salt, so increase the amount of fresh food you eat, the end goal of reducing salt intake appears to have been communicated. Clearly the message has resonated strongly, with 1 in 5 consumers already changing their behaviour towards salt as a result of the ad. This change in behaviour tends to higher amongst females and those aged over 50. Those in the Republic of Ireland are also more likely to have changed behaviour.

One of the most positive results in this wave of research has been ***safe*food**'s position as the second most cited organisation as a "general" source of information on healthy eating, with 1 in 4 consumers citing ***safe*food**, second only to GPs with 27%. Interesting, there were little differentials in gender or age in terms for those mentioning ***safe*food** in this instance, although social class did tend to be somewhat of a factor. It is also encouraging given ***safe*food's** debut in "healthy eating" advertising, that over 1 in 5 consumers on the island use ***safe*food** as a source of information on healthy eating.

The research also strongly demonstrates that ***safe*food** as a brand is well recognised by consumers across the island, with nearly 2 in 3 members of the public aware of the brand. While this has decreased from a record high of 3 in 4 six months ago, this can be partially explained by a reduction in advertising weighing and the rolling out of a new message i.e. healthy eating, which may have caused some initial confusion. However, consumers' experience of ***safe*food** continues to grow in a positive direction, with more than two thirds of consumers believing the organisation is Knowledgeable, Relevant, Reliable and Trustworthy. This strong performance is repeated when ***safe*food's** role in the healthy eating space is evaluated, with 7 in 10 consumers believing that ***safe*food** is "responsive to public concerns regarding healthy eating" and "provides the public with good advice". However, it is important to note that these scores are considerably lower in Northern Ireland, suggesting as per previous campaigns, that more work may need to be conducted at a grass routes level within communities in Northern Ireland.

In summary, this latest wave of research has shown a mixed performance, with a reduction in advertising weighting and a new emphasis on healthy eating., the most likely factors responsible for the decrease in those concerned about food safety and/or aware of communication in this space. However, initial results for ***safe*food's** first healthy eating campaign appear to have resonated strongly with consumers, due to the contemporary nature of the subject matter and a growing awareness of the affect diet has on health and disease prevention. The development of a "healthy eating" TV advertising campaign is likely to see similar if not superior results achieved to date for the food hygiene communications programme.