Industry Attitudes to Food Safety in Ireland

October 2003

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1.   INTRODUCTION

The Food Safety Authority of Ireland's (FSAI) Food Safety Consultative Council (FSCC) was formed in 2001 under the Food Safety Authority of Ireland Act, 1998. The Council comprises of 22 members representing a broad range of interests drawn from various sectors of the food industry and consumers. It represents the key stakeholders in Ireland in relation to food production and consumption, and is a positive mechanism for consumers and the food sector to debate issues and provide input to the agenda of the FSAI.   Twelve of the members are appointed by the FSAI and the balance is appointees of various Government Ministers. See Appendix 1 for the list of members of the Food Safety Consultative Council.

The objectives of the Food Safety Consultative Council are to:

- advise the FSAI Board on specific issues
- enable the FSAI to discharge its function to consult widely for the purposes of promoting higher food safety standards
- progress the food safety agenda.

The Food Safety Consultative Council believes that attitudes can shape behaviour. While legal compliance is important, key influences in food safety are the attitudes of both consumers and the food industry. In order to benchmark industry attitudes to food safety a comprehensive survey was undertaken in 2002 using qualitative and quantitative methods.   Over thirteen hundred industry representatives across many sectors were involved in the survey. The results are set down in this report. Attitudes to a wide variety of food safety issues were examined. These included the safety of food produced in Ireland, the regulation of the food industry, quality assurance schemes, food labelling and food safety training.

Since its establishment the Food Safety Consultative Council has identified progressing the food safety agenda as one of its objectives. The Council are of the opinion that attitudes to food safety within the industry are a key influence. Changing attitudes can lead to changes in behaviour. The survey results are being used to inform the strategy of the FSAI. It is proposed to conduct further surveys in the near future in order to measure change in attitudes over time and to continue to help focus the work of the Authority.

2. METHODOLOGY

2.1 Research Objectives

The aim of this research was to establish benchmarks against which future change in industry attitudes to food safety could be measured. A further survey will be required before the Council completes its term of office, to determine what changes have occurred in industry attitudes during that period. This report details the findings from the survey of food industry representatives with regard to various aspects of food safety. The findings from the survey into consumer attitudes to food safety including the views of children are detailed in a separate report.

A market research working group was established, comprising of members of the Consultative Council and FSAI executives. Details of the members are given in Appendix 2. The scope of the project was defined and a list of questions compiled. Following normal tendering procedures, the project was awarded to Millward Brown Irish Marketing Surveys Limited (Millward Brown IMS).

2.2. Research Methodology

The methodology was agreed to ensure that the findings of the survey would be representative across the various food industry sectors. Two separate pieces of research were conducted as follows:

1. A quantitative survey of food industry representatives
2. A qualitative study among food industry representatives

Initially five informal interviews with personnel at the FSAI and random members of the FSCC were carried out in order to inform Millward Brown IMS on key issues and priorities in relation to food safety.

2.2.1. Quantitative survey of food industry representatives

The quantitative research involved 1,275 telephone interviews with industry representatives using a structured questionnaire. Food industry representatives were selected at random from lists compiled from various sources including FSAI, a list

broker and other organisations. Interviews were achieved across 19 different industry sectors (Table 1) with a minimum quota of 50 interviews set in each. The resulting data was then weighted into the correct industry proportions at the analysis stage. The interviews were conducted with the most senior person involved in food safety and hygiene in the organisation. The food industry research was carried out between the 26th April to 25th of May 2002.

2.2.2. Qualitative survey of food industry representatives

The qualitative research involved 25 one-to-one, in depth interviews across all industry sectors with 19 individual sectors represented, as outlined in Table 1. The interviews carried out were a mix of face-to-face and telephone interview which lasted between 20 and 60 minutes depending on the respondent. Interviews followed a broad topic guide rather than a structured questionnaire. The qualitative survey of food industry representatives was carried out in April and May of 2002.

The report begins with a summary of key findings. More detailed comment and presentation of results is provided in the main body of the report, which follows the structure of the questionnaire.

Table 1. Individual industry sectors represented in the survey

Individual industry sectors represented in the survey	
Abattoirs	Importers/Wholesalers
Beef Farmers	Manufacturers
Butchers	Organic Farmers
Cereal Farmers	Pig Farmers
Dairy Farmers	Poultry Farmers
Fast Food/Take-away	Pubs
Fish/Cheese	Restaurants/ Hotels
Fruit and Vegetables	Retailers
Guest house/B&Bs	Sheep Farmers
Hospital/Caterers	

3. RESULTS

3.1 Food Safety and Hygiene in General

3.1.1 Food Safety in General Context

Industry was asked to rate their level of concern regarding six prompted items and the results are shown in Table 1. Industry representatives were least worried about the safety of the food produced by Irish industry as it ranked sixth in the list of industry related issues. Industry related issues of most concern were the cost of labour and the threat of cheap imports.

Table 1. The percentage of the food industry who expressed concerns in relation to a prompted list of general industry related issues.

List of Issues (Base: Food Industry)	**% Worried**
The cost of labour	73
Threat of cheap imports	72
Staff/Labour shortages	51
Increasing competition	49
Workplace theft	35
The safety of the food produced by Irish industry	28

Of the 28% of industry representatives who were concerned about the safety of the food produced by Irish industry there is some degree of variance between individual business sectors. Many of those (70%) involved in organic farming were worried about food safety. 44% of both hospitals/caterers and guest house/B&B owners were also concerned about food safety. However, pig farmers (20%), cereal farmers (18%) and abattoirs owners (20%) were much less concerned about the safety of the food produced by Irish industry.

3.1.2   Specific Food Safety Concerns

Industry representatives were given a list of twelve specific food safety related issues and were asked how concerned they were about each issue. As shown in Table 2 industry rated additives, pesticide and herbicide residues and genetic modification of food as their top three concerns. Food poisoning rated fifth and BSE rated ninth.

Table 2. The percentage of industry representatives who expressed concerns in relation to a prompted list of specific food safety concerns.

List of Specific Food Safety Concerns (Base: Food Industry)	% Industry Worried
Additives	57
Pesticide & herbicide residues	55
Genetic modification	53
Radiation levels	52
Food poisoning	49
Antibiotic residues	47
Microorganisms	42
Food irradiation	39
BSE/Mad Cow Disease	39
Food hygiene	37
Scrapie	32
Natural toxins	31

3.1.3   Perceived Consumer Worries

38% of industry representatives do not believe consumers are worried about the safety of food produced by Irish industry, a similar proportion (41%) assert that they are concerned (Figure 1). The issues which concern industry (Table 2) are quite different from those which concern consumers (outlines in the Consumer Attitudes to Food Safety in Ireland Report). Pesticides and herbicide residues in food was an area where industry and consumers agreed, this was the single largest concern for consumers and

second for industry. Industry was asked what they thought consumers were actually worried about. Figure 2 outlines the issues which industry think Irish consumers are worried about. The findings show that industry's knowledge in this area is remarkably accurate when compared to the findings form the Consumer Attitudes to Food Safety in Ireland Report. Industry recorded consumers' perceived main worries to include hormone/chemical enhancers, BSE/scrapie, quality and traceability/origin of food and general hygiene (Figure 2).
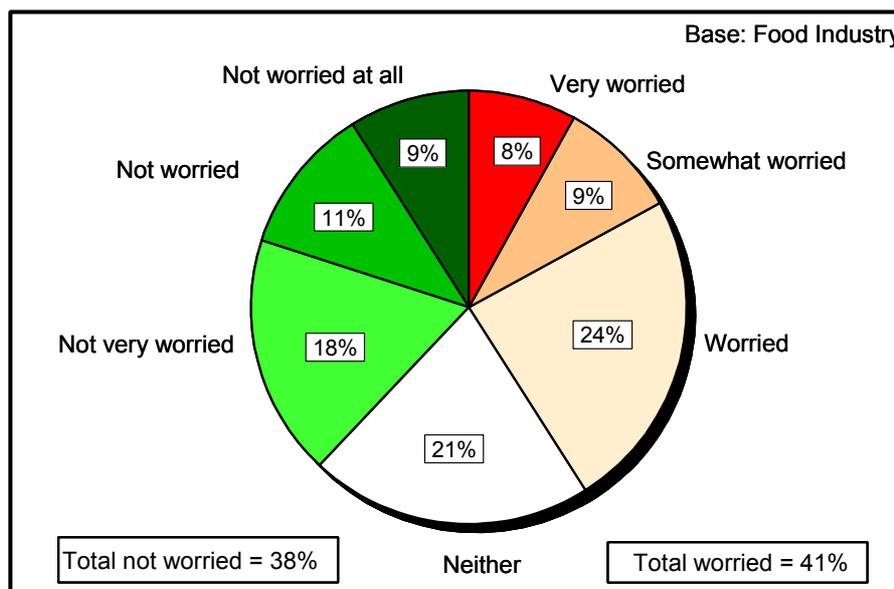

Figure 1. How worried do you think Irish consumers are about the safety of food produced by Irish industry?
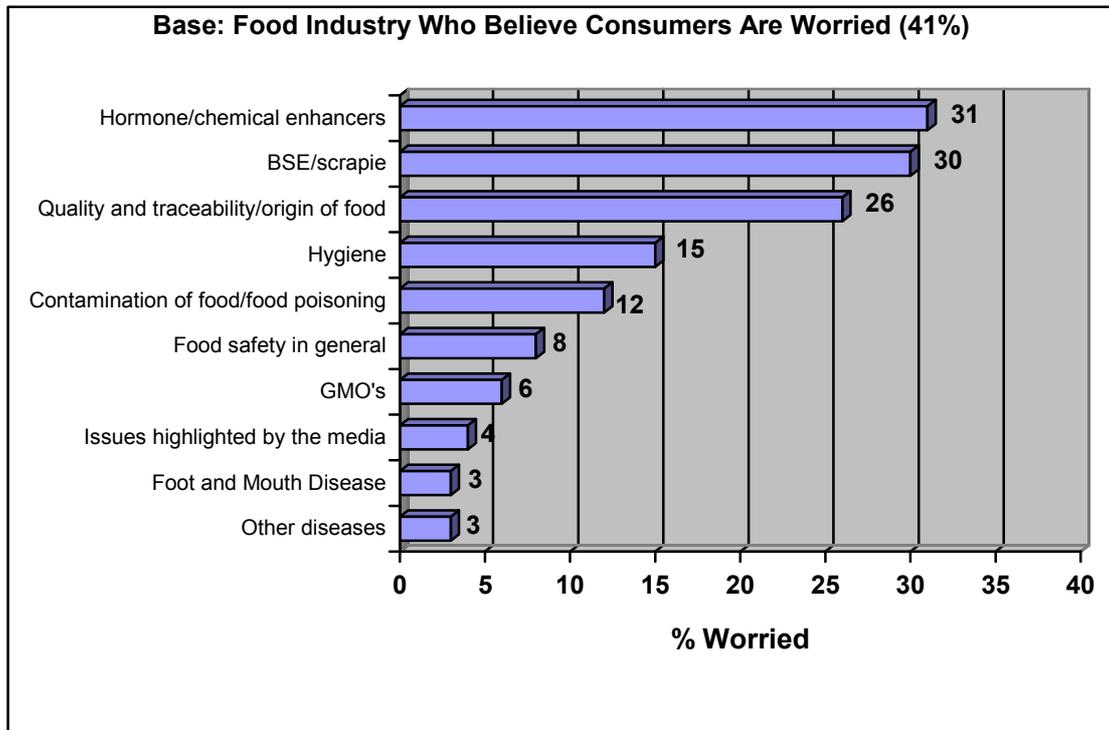
Base: Food Industry Who Believe Consumers Are Worried (41%)

Issue	% Worried
Hormone/chemical enhancers	31
BSE/scrapie	30
Quality and traceability/origin of food	26
Hygiene	15
Contamination of food/food poisoning	12
Food safety in general	8
GMO's	6
Issues highlighted by the media	4
Foot and Mouth Disease	3
Other diseases	3

% Worried

Figure 2. What issues do you think Irish consumers are worried about?

Related to this question, industry were asked if consumer concerns were in fact reflected in purchasing and eating habits and 75% of industry considered this to be definitely or probably the case (Figure 3).
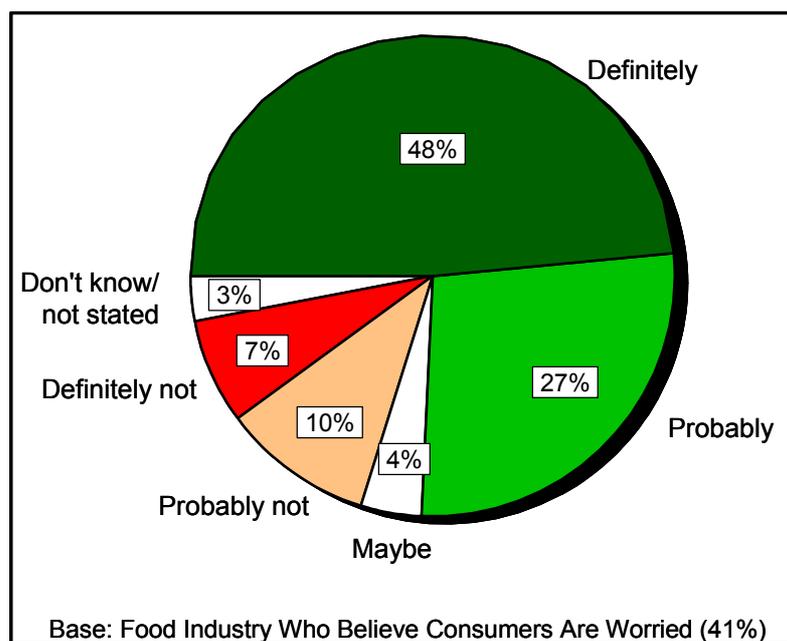
Definitely 48%

Don't know/ not stated 3%

Definitely not 7%

Probably not 10%

Maybe 4%

Probably 27%

Base: Food Industry Who Believe Consumers Are Worried (41%)

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Figure 3. Do you think that consumer concerns are reflected in their purchasing and eating habits?

3.1.4　Has Food Safety Improved or Dis-improved?

70% of industry considers that food safety has improved over the past 10 years (Figure 4). 81% of retailers believe that food safety has improved while 64% of caterers hold this view.
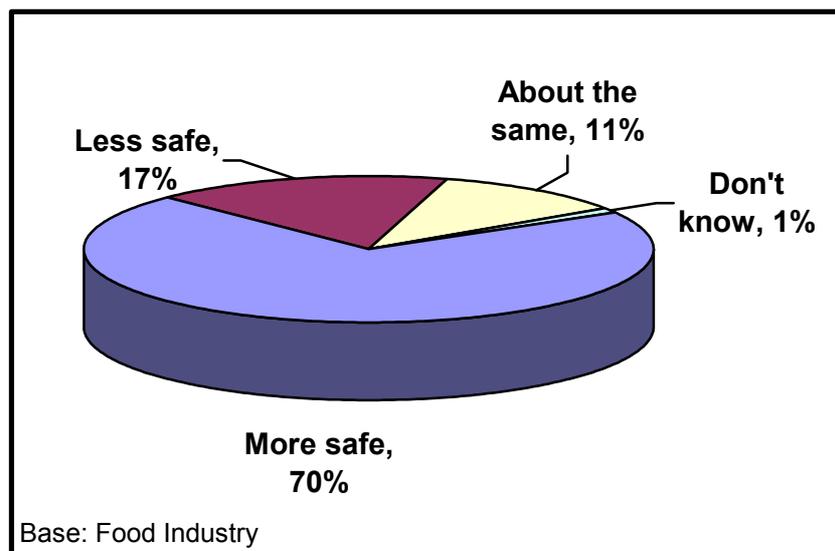

Figure 4. Do you think that the food produced nowadays is more or less safe than it was 10 years ago?

3.1.5　Food Safety Concern Across Various Sectors

Industry representatives were asked if they were concerned about the about the safety of food sold in restaurants, cafes or hotels, in shops and supermarkets or produced on Irish farms. 48% were worried about the safety of food sold in restaurants, cafes or hotels, 31% were worried about the safety of food sold in shops and supermarkets and 17% about the safety of food produced on Irish farms.

When industry representatives were asked at what point in the food chain does the greatest risk to food safety lie, 24% of respondents identified the catering sector as the sector they were most concerned about in relation to food safety risks (Figure 5).
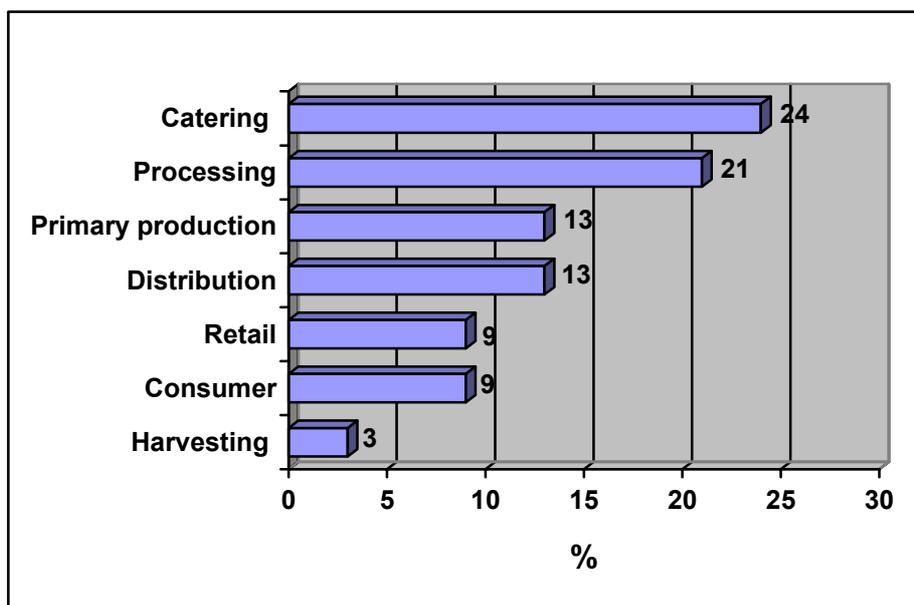
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Figure 5. At what stage in the food chain, if any, would you be most worried about food safety risks (Base: Food Industry)?

3.1.6   Food Safety Issues which need to be Addressed

Stopping untraceable imports, hygiene, traceability generally and the origin of food were most mentioned by industry as issues that they need to address themselves (Figure 6). This trend in relation to traceability was found to be higher among primary producers. Industry also highlighted that the regulatory bodies also need to focus on these issues.
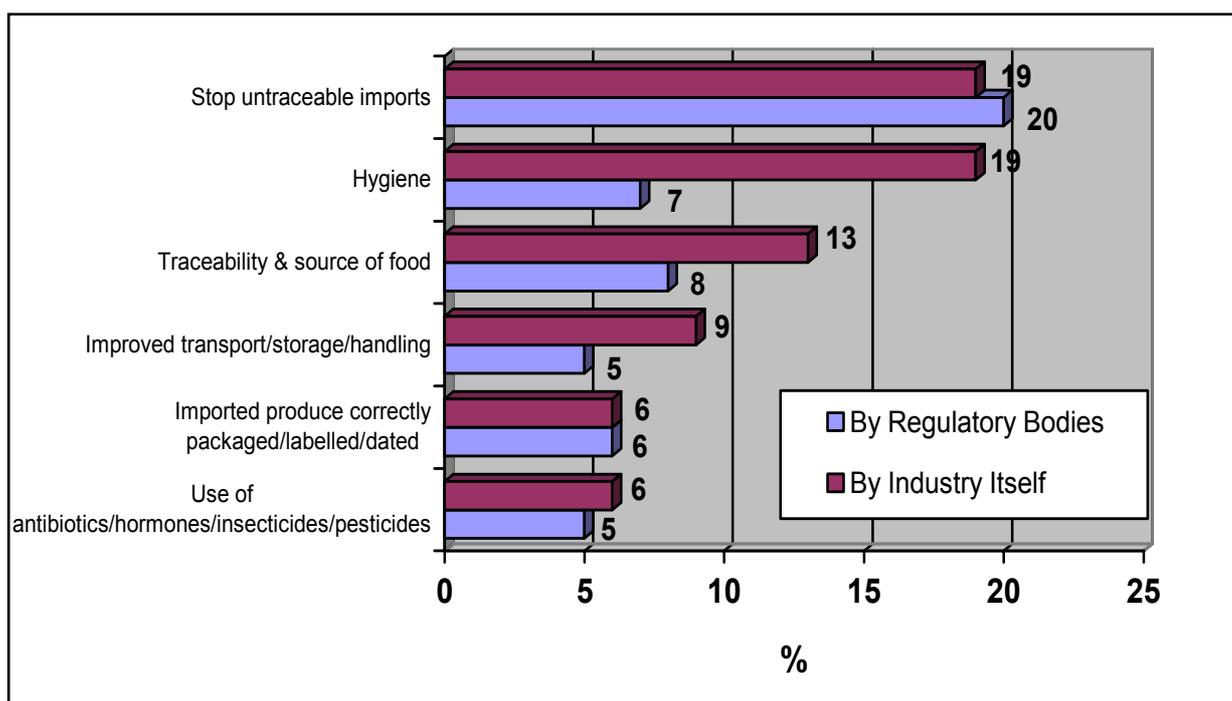
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Figure 6. What, if any, food safety issues need to be addressed by industry themselves or by organisations that oversee food safety regulation in Ireland?

Qualitative survey of industry representatives

The main concern about food safety, expressed in the qualitative research phase, was in relation to consumers. Industry often felt that consumers may not adhere to the correct storage conditions after they purchase food.

Also in the qualitative research, the one outstanding issue that all sectors of industry above primary producers are most consistently concerned about is that of suppliers. The second area of concern is that of general hygiene standards. Industry as a whole is more concerned about the catering end of the food supply chain.

3.2   Food Safety Regulation

3.2.1   Confidence in Food Safety Measures

A total of 76% of industry are confident in food safety measures across the entire food chain while 89% of industry are confident in food safety measures in their own particular industry sector (Table 3).

Table 3. How confident are you in the food safety measures that are currently in place in (a) Irish industry in general and (b) in your own particular industry?

Confidence in the food safety measures currently in place (Base: Food Industry)	Confidence in Irish industry in general, %	Confidence in respondents own industry, %
Confident in food safety measures	76	89
Not confident in food safety measures	8	4
Don't know/neither confident or not confident	16	7

3.2.2   Industry Awareness of Food Safety Regulatory Bodies

One in five Irish food industries reported that they did not know the number of different agencies or bodies that regulate their industry in terms of food safety. One quarter of the food industry believe there to be only one body overseeing the regulation of their industry in terms of food safety (Table 4) - this was most often claimed by those in the catering and retail sector.

Table 4. How many different agencies or bodies regulate your industry in terms of food safety?

Number of Different Food Safety Regulatory Bodies	%
(Base: Food Industry)	
One	25
Two	18
Three	18
Four	11
Five	4
Six plus	5
Don't know	19

Spontaneous awareness among industry of those agencies or bodies involved in the regulation of food safety legislation is quite low. The Health Boards (27%), the Department of Agriculture and Food (27%) and the Food Safety Authority of Ireland (21%) were most frequently identified spontaneously as involved in the regulation of food safety legislation (Figure 6).

When prompted with a list of names of those organisations that oversee food safety regulation in Ireland however, the levels of awareness rise significantly with the majority of regulatory bodies achieving awareness by greater than 80% of the food industry (Figure 6).
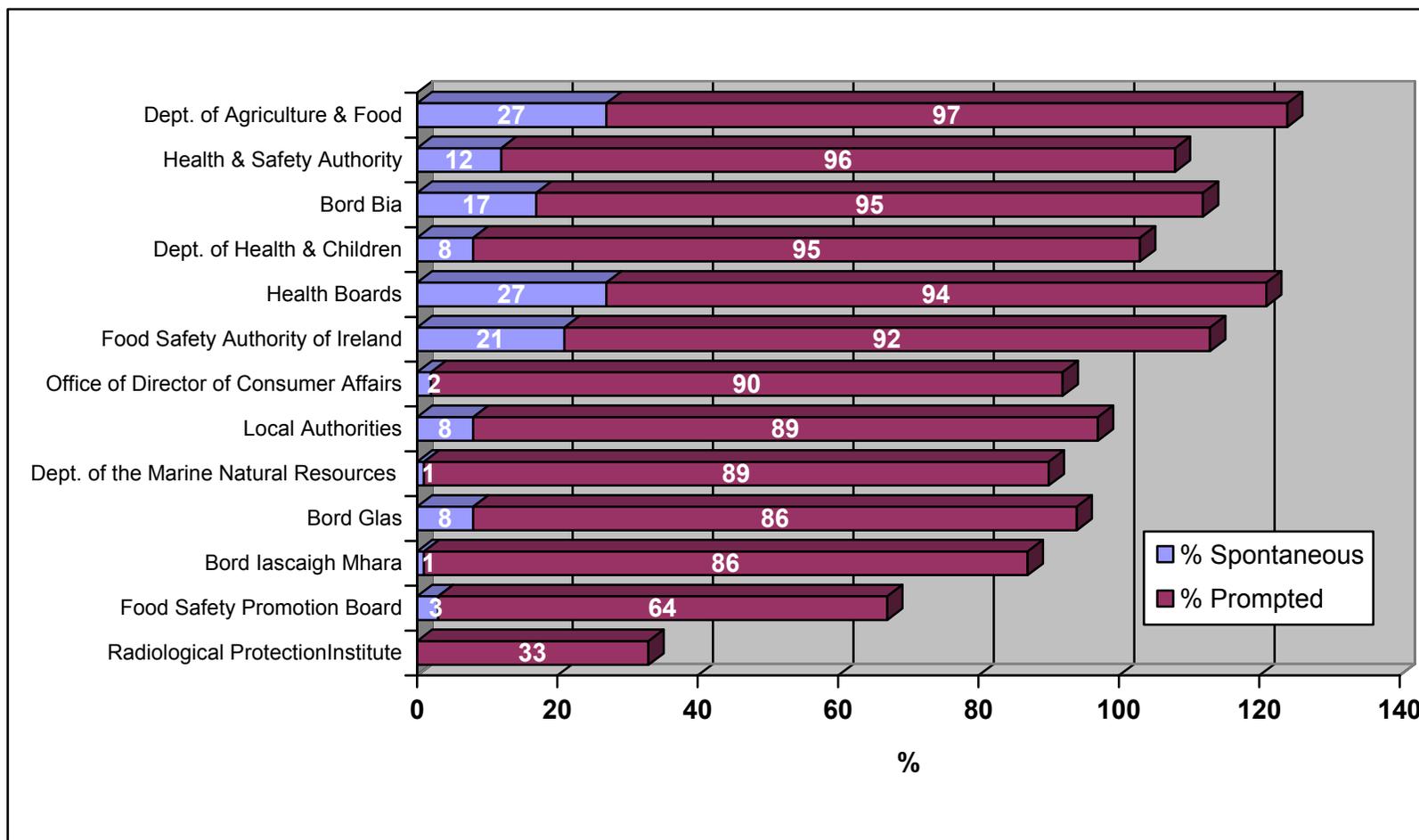
Figure 6. (a) Can you tell me the names of the organisations that oversee food safety regulation in Ireland (spontaneous)? (b) Which of these organisations have you ever heard of (prompted)?

For each organisation they were aware of, industry were asked to rate their satisfaction with the organisation. Results were then plotted on two axes to give a "Familiarity versus Favourability" map. This map is then divided into four quadrants where the upper right quadrant indicates the highest awareness and highest satisfaction level. Those agencies located in this area were the Health and Safety Authority, Bord Bia and the Food Safety Authority of Ireland (Figure 7).
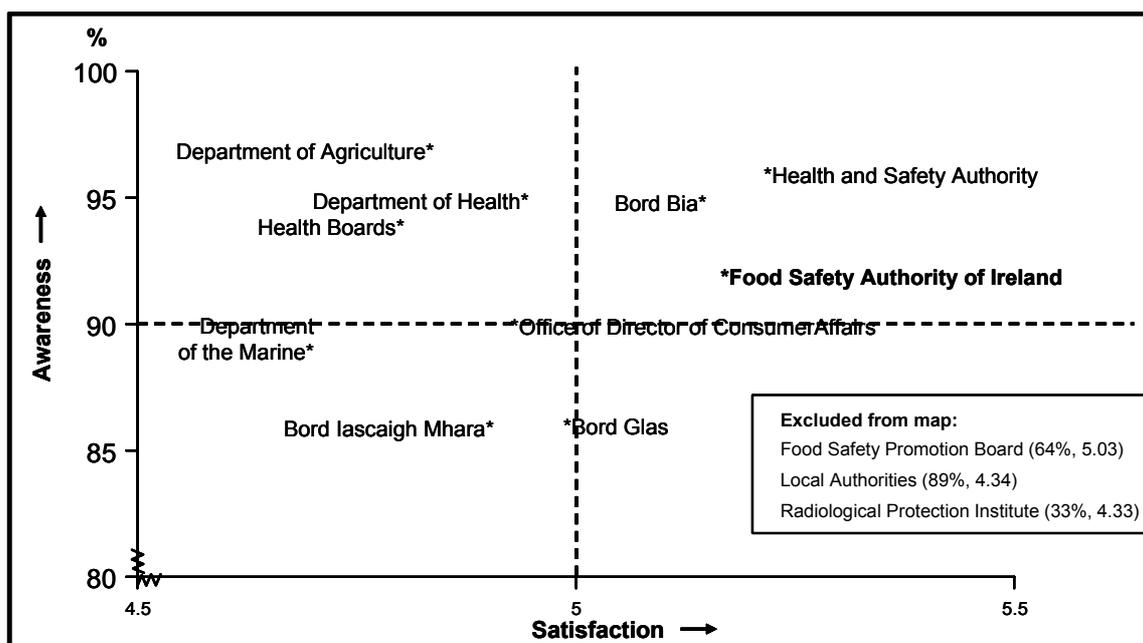

Figure 7. Regulatory Bodies – Familiarity versus Favourability (Base: Food Industry)

3.2.3   Responsibility for Resolving Food Safety Issues

Industry was asked who or what agency was responsible for resolving food safety issues. 63% believe that government and its agencies are responsible for resolving food safety issues, 20% believe that this is a joint responsibility with industry and 11% believe it is industry's own responsibility to resolve food safety issues (Figure 8). This was most notable in the organic farming sector where one third of organic farmers reported that food safety was a shared responsibility. Only 9% of the Irish food industry cited that industry itself is responsible for resolving issues relating to food safety, this was most notable in the fast food/takeaway sector where 22% believe that the responsibility lies with industry to resolve food safety issues.
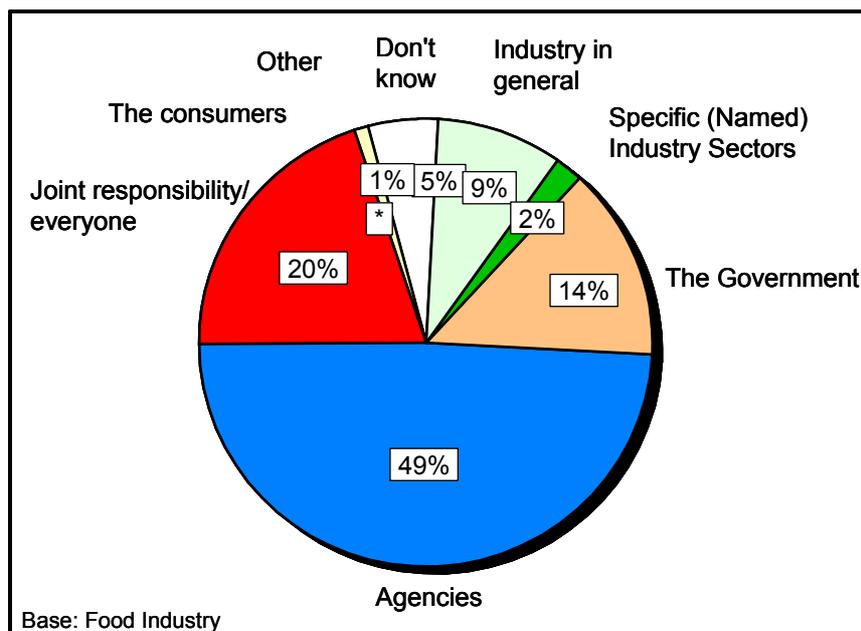
Figure 8. Who do you believe is responsible for actually resolving issues relating to food safety?

Industry attitudes to the jurisdiction of FSAI extending onto farms was also examined in the survey. 60% of industry representatives cited that they believe that the jurisdiction of the FSAI should go back further than the farm gate (Figure 9). This trend was most notable in the catering and retail sector. Of the 36% of those who were of the opinion that the jurisdiction of the FSAI should not go back further than the farm gate 48% were primary producers. This opinion among primary producers was also voiced in the qualitative research phase.
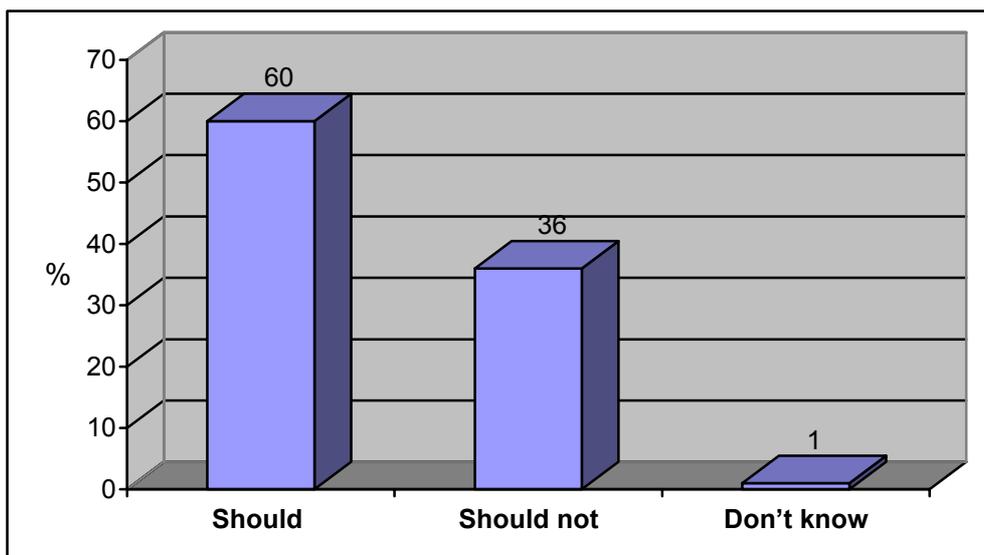
Figure 9. Should the jurisdiction of the FSAI should go back further than the farm gate (Base: Food Industry)?

3.2.4   Level of Food Safety Regulation and Enforcement

Industry was asked to rate the level of regulation and enforcement of food safety controls at present. 46% of industry believes that the level of regulation is correct, 36% think that there is too much regulation and 17% too little. 40% think there is the right amount of enforcement activity, 24% believes that there is too much and 33% believes that there is too little enforcement (Table 5).

Table 5. Would you say there is too much or too little food safety regulation and enforcement of these regulations in your industry?

Industry Rating of the Level of Food Safety Regulation and Enforcement of Food Safety Regulations (Base: Food Industry)	Regulations %	Enforcement %
Too much	36	24
The right amount	46	40
Too little	17	33
Don't know	2	3

3.2.5 Quality Assurance Schemes

Industry attitudes to quality assurance schemes were also examined in the survey. 69% of the food industry believe that quality assurance schemes have a valuable role in addressing food safety issues (Figure 9). This was most often reported by the processing/manufacturing sector. 10% believe that quality assurance schemes do not have a role in addressing food safety issues and this is marginally more likely to be the case with those in the catering industry.
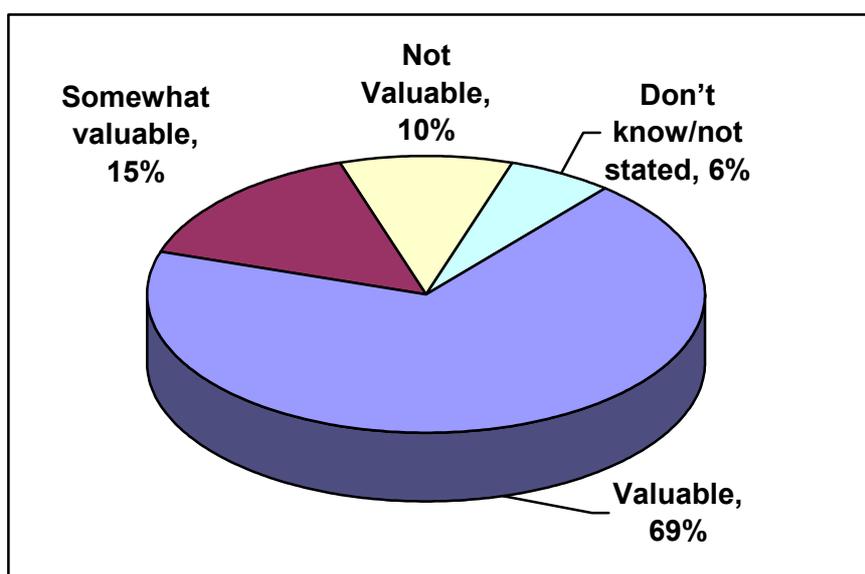

Figure 9. How valuable a role do quality assurance schemes have in addressing food safety issues (Base: Food Industry)?

3.2.6 Formulation of Legislation and Regulations

When industry representatives were asked if they thought they themselves or their industry has an influence in the formulation of legislation and regulations, 58% said yes they had an influence (Figure 10). It was primary producers (60%) who most often reported that they felt they had an influence on the formation of legislation and regulations.
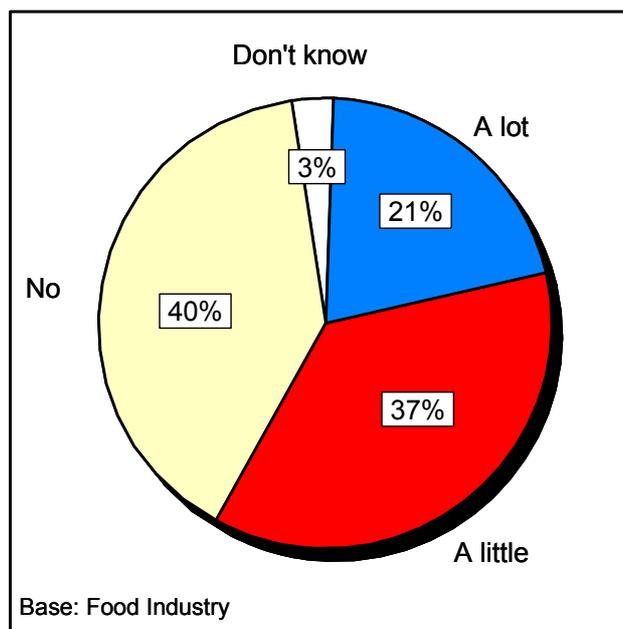
Figure 10. Do you think you and your industry has an influence in the formulation of legislation and regulations (Base: Food Industry)?

Qualitative survey of industry representatives

In the qualitative research phase there were mixed views on food safety regulations. While all understood the need for regulations, there was a mixed reaction to the amount of regulation of the food chain, some feel that regulations are too stringent and others believe that there are not enough regulations. The degree of paperwork required as part of the record keeping component of the hazard analysis and critical control point (HACCP) system was identified as onerous across all sectors of industry.

In the qualitative research phase almost half of those interviewed were aware of the FSAI. Those in the catering and retail sectors had read literature and some had attended courses run in conjunction with the FSAI. Primary producers recalled the FSAI from media coverage.

3.3   Food Labelling

One third (33%) of industry believe there is insufficient information on the labels currently found on food (Figure 11). 70% of organic farmers believe there is insufficient information on the food labels.   57% of industry representatives believe the right amount of information is contained on food labels, in this regard fast food/takeaways and retailers are most likely to be satisfied, 76% and 70% respectively feel the right amount of food labeling exists.

In terms of the clarity of the information contained on food labels (Figure 12), 46% of food industry representatives believe that the information contained on labels is clear and 38% believe it is confusing.

Qualitative survey of industry representatives
In general in the qualitative research the view was that product labels contain a vast amount of information nowadays, however, traceability and country of origin labelling were identified as among the most important aspects of product labelling.
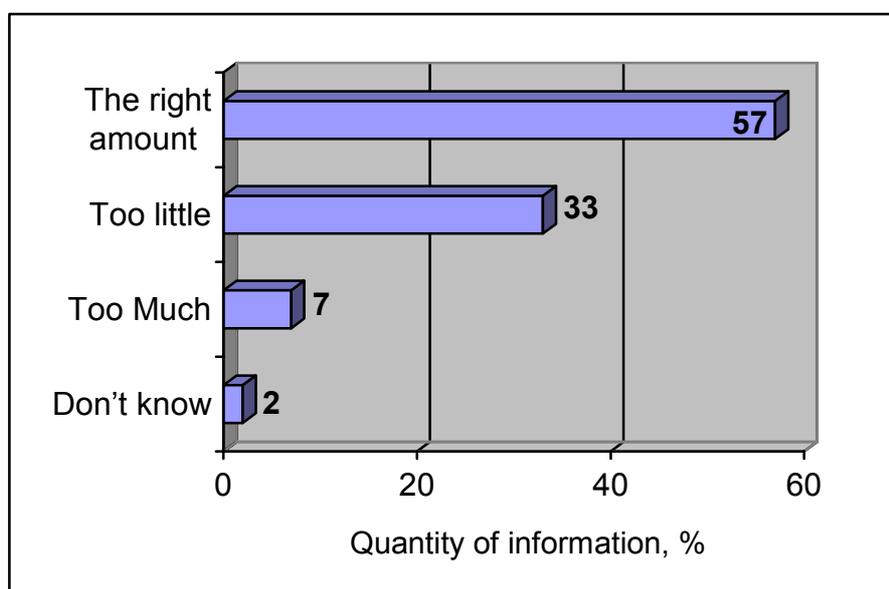

Figure 11. Do you think the labels on food have too much, too little or just the right amount of information (Base: Food Industry)?
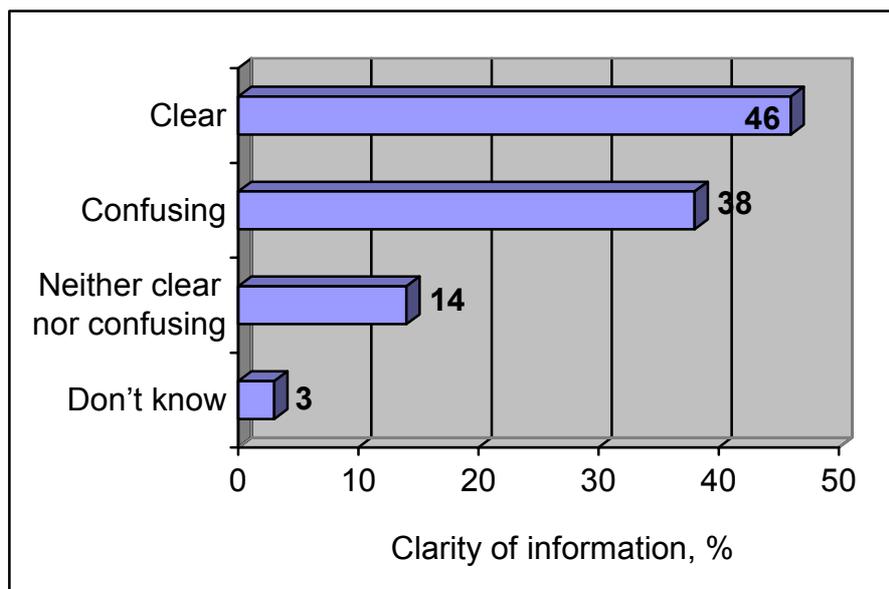
Figure 12. Do you think the information on the labels on food is clear or is it confusing or neither (Base: Food Industry)?

3.4 Training and Information

86% of the food industry in Ireland believe themselves to be well informed about food safety information (Table 6). 98% of processors/manufacturers, 96% of retailers and 83% of primary producers cited that they are well informed about food safety.

Table 6. How well informed do you think you are in terms of food safety information?

How well informed are industry in terms of food safety (Base: Food Industry)	%
Well informed	86
Not well informed	13

13% of food industry claim they either do not know where to get food safety training and information or that there is no food safety training, information or education. Figure

13 outlines their main sources of food safety training, information and education identified by the food industry.
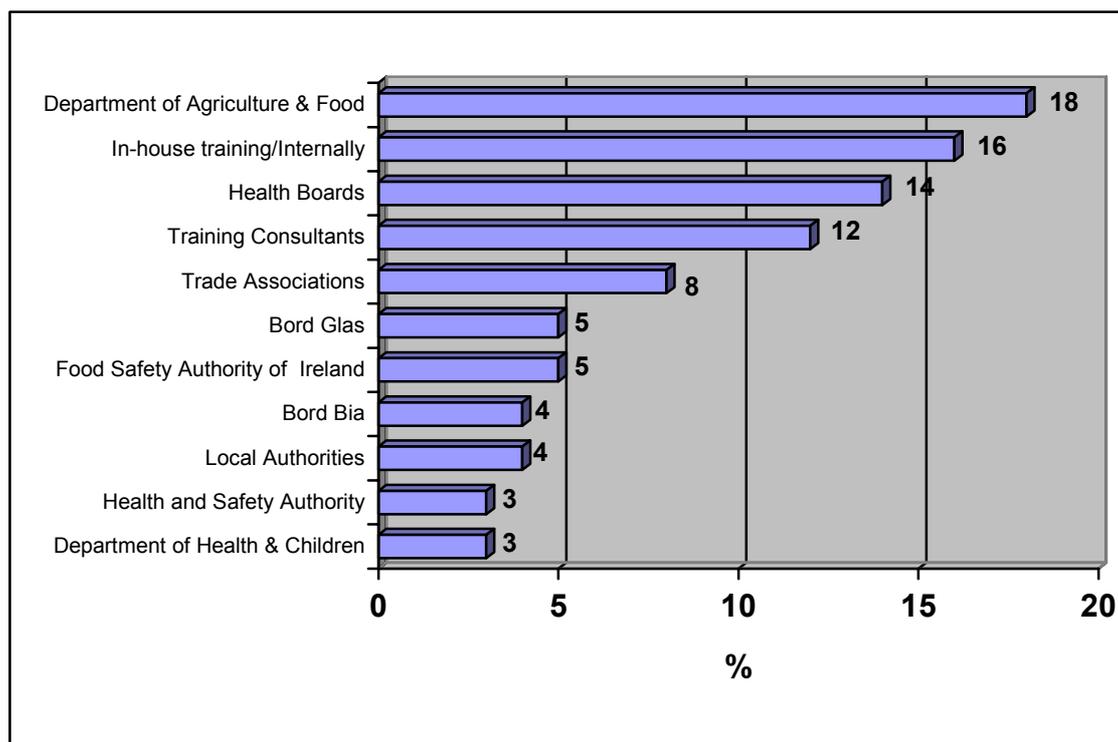

Figure 13. From where, if anywhere, does your company or business get food safety training, information or education (Base: Food Industry)?

71% of the Irish food industry believe that food safety training should be improved (Figure 14). 28% however believe that there are currently barriers to adequate training and this is highest among processors/manufacturers, retailers and caterers (37%, 35% and 32% respectively). The main barriers identified were – the lack of funding for training, the high cost of training, the lack of time/staff cover for training and the availability of suitable courses.

Qualitative survey of industry representatives
It was identified in the qualitative research phase that industry feel that sector specific HACCP training is required.
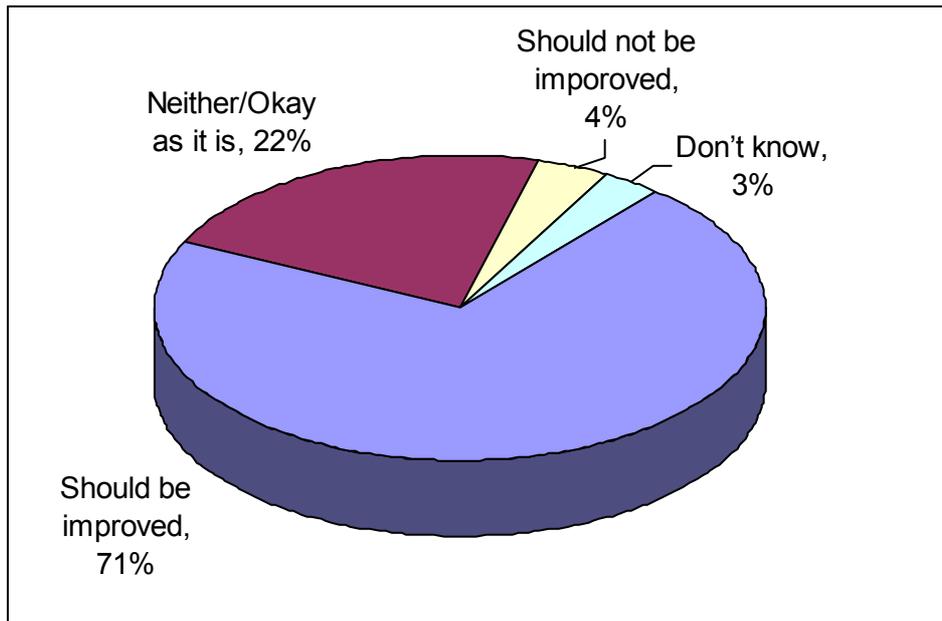
Figure 14. Do you think that food safety training in general should be improved or not (Base: Food Industry)?

APPENDIX 1

Members of the Food Safety Consultative Council

Name	Organisation
Mr Pat Caulfield (Chair)	Numico Infant Nutrition
Ms Darina Allen	Ballymaloe Cookery School
Ms Veronica Campbell	Campbell Bewley Group
Mr Sean Conlan	Excellence Ireland
Mr Jamie Conlon	Masterchef
Ms Anne-Marie Crowley	National Standards Authority of Ireland
Mr Dermott Jewell	The Consumers' Association of Ireland
Mr Pat Keogh	Bord Iascaigh Mhara
Mr William Kingston	Dairy Farmer
Ms Fiona Lalor	IBEC
Ms Margaret Leahy	Irish Organic Farmers & Growers Association
Ms Anne McGarry	Radiological Protection Institute of Ireland
Mr Kevin Moyles	Public Analyst - Dublin
Mr Pat Moynihan	Fás
Mr Martin Mullane	Glanbia
Mr Larry Murrin	Dawn Farm Foods
Ms Breda Naughton	Reception and Integration Agency
Ms Brid O'Connor	Office of the Director of Consumer Affairs
Mr John Power	Irish Hotel Federation
Ms Anne Quirke	Consumer
Ms Breda Raggett	Irish Countrywomen's Association
Kathryn Raleigh	Irish Business and Employers Confederation – *until Feb 2002*

APPENDIX 2

Members of the Food Safety Consultative Council Market Research Sub-Group

Darina Allen

Dermott Jewell (sub-group leader)

William Kingston

Fiona Lalor

Margaret Leahy

Ann McGarry

Larry Murrin

Brid O'Connor

FSAI staff

Eileen Lippert

Pat O'Mahony

Ciara O'Reilly