High Stakes of Food Safety in Dairy, Deli, Bakery & Prepared Foods

A special consumer research report prepared for IDDBA by Phil Lempert Supermarket Guru®
THE HIGH STAKES OF FOOD SAFETY IN DAIRY-DELI-BAKERY & PREPARED FOODS

ONE-THIRD OF U.S. SHOPPERS HAVE LEFT UNCLEAN SUPERMARKETS. MORE THAN HALF WOULD SHOP MORE IN STORES EXCELling IN FOOD SAFETY, SAYS EXCLUSIVE 2015 IDDBA-SUPERMARKETGURU CONSUMER SURVEY REPORT.

Executive Summary

America craves convenient meals today, made from prepared foods, easy-to-heat and ready-to-heat takeout. Stores sell them on seemingly every block, strip center and mall. To stand out as primary destinations, dairy-deli-bakery in supermarkets must be impeccably clean and safe.

That's because shoppers protect their households and focus on health and wellness with hawk-eye sensitivity to food safety.

People have time to observe a lot while waiting on lines in dairy-deli-bakery:

- From food servers’ grooming to the state of the physical setting.
- From workers’ hygiene habits to cleaning methods for slicers, counters, showcases and trays.
- From food handling to temperature integrity.
- And more.

This exclusive survey and special report by the International Dairy-Deli-Bakery-Association and SupermarketGuru, The High Stakes of Food Safety in Dairy-Deli-Bakery & Prepared Foods, details what shoppers see and think – and precisely how their many perceptions shape trip frequency and basket size.

In short, this report underscores how food safety practices in a dairy-deli-bakery directly impact (a) a store’s total performance, and (b) its credibility with shoppers as a primary resource of health and wellness foods and beverages.
The business case is inarguable: stores with less-than-stellar reputations earn shrugs rather than new business and consumer praise. With this report, retailers for the first time have national consumer data to pinpoint exactly where to shore up food safety in dairy-deli-bakery, and the consequences of not doing so.

Consider these study highlights:

· One-third of U.S. adults (33.8%) have ended a supermarket visit due to store messiness. That’s 1 in 3 consumers who’ll abort a trip if a store is sub-standard in their eyes.

· Shoppers are pickier about food safety within dairy-deli-bakery than overall store cleanliness. Six out of 7 (85.2%) need to feel confident of food safety in these service areas before buying there; fewer (83.3%) shop in a supermarket only if it looks clean to them.

· Five key traits of supermarket leadership in food safety stem directly from dairy-deli-bakery departments. Excellence matters because the item varieties and services here distinctly separate supermarkets from many other kinds of food sellers. The traits are:

  --Pristine areas where food is handled (55.1%)
  --Food handlers wash hands, change gloves often in full view of customers (55.1%)
  --Highest grade from a food safety inspector, posted for customers to see (32.0%)
  --Food handlers wear hair restraint (28.0%)
  --Food handlers wear clean jackets, aprons or uniforms (27.3%)

· Good news for supermarkets. They are the most trusted retail format for food safety. By a wide margin, shoppers trust grocers to keep them safe – they command the #1 position with 60.1% of mentions, which is triple the mentions of specialty stores (20.0%), the #2 channel. All other food sellers are in the single digits.

· Within supermarkets, consumers trust service perishables department managers the most for food safety – by a 46.9% margin vs. store managers (17.4%) and butchers (10.5%).
· Consumers are split on trade-offs if retailers need to raise prices or slow down service in order to ensure superior food safety. Nearly six in 10 U.S. adults (58.3%) are OK with slower service, while slightly fewer respondents (56.9%) are OK with higher prices.

· More good news for supermarkets that commit to best practices in food safety: they would earn more total trips from shoppers, according to 52.4% of survey respondents.

· Bigger baskets in dairy-deli-bakery are another positive outcome. Nearly 4 in 10 consumers (38.7%) say they would spend more in these departments with superior food safety practices in place.

· Consumers are deeply concerned about food safety – as they should be since CDC reports that 1 in 6 Americans (48 million) contract E.coli, listeria, salmonella or other foodborne illnesses each year. Yet consumers lack detailed knowledge of these diseases, contaminants, and retailer best practices. Their innate sense of what seems right and wrong takes them only so far. Supermarkets can bridge these knowledge gaps and build their own authority via educational programs, signage and consistency in their visible operating disciplines.

· The study also richly details what shoppers like and don’t like in workers’ physical appearance and hygiene habits; cleaning methods; state of the physical setting; food preparation and serving practices.

Methodology

The International Dairy-Deli-Bakery Association (IDDBA) commissioned SupermarketGuru to survey U.S. consumers about their confidence in food safety in supermarkets, particularly within the dairy, deli, bakery and prepared food areas of the store. A total of 605 adult respondents age 18 and older rated supermarkets on dozens of food safety traits, and tied the ratings they gave to their own purchase behaviors. The survey was conducted online during February and March 2015.

Survey design and analysis by Consumer Insight, Inc.
Phil Lempert & Al Heller
SOME KEY TAKEAWAYS:

- Q4  One-third of U.S. adult consumers have ended a shopping trip due to store messiness.
- Q6  Shoppers pickier about dairy-deli-bakery than store conditions overall.
- Q7  Three of the key traits for food safety image of store relate directly to dairy-deli-bakery (if you include spotless floors)
- Q9  Supermarkets most trusted channel for food safety
- Q10  Dept. managers most trusted within the supermarket for food safety
- Q21, 22, 23  Safety-money-time tradeoffs – more trips, bigger transactions from superior food safety practices
- Q24-25  Consumer knowledge gaps about food safety, though they care deeply about these topics. Opportunities for supermarkets to build trust and set stage for results cited in Q22-23
- Also, lots of details re what people like and don’t like in workers’ physical appearance, physical setting, cleaning, hygiene, preparing and serving practices

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SECTION 1: SUPERMARKETS AND FOOD SAFETY

Q1. DO CONSUMERS EVER SHOP IN A SUPERMARKET FOR DAIRY, DELI OR BAKERY ITEMS?
An overwhelming 96.5% of U.S. adult survey respondents say yes. All yes respondents were allowed to continue taking this survey.

Q1 Do you ever shop in a supermarket for dairy, deli or bakery items?

Q2. DO CONSUMERS GENERALLY SHOP IN A SUPERMARKET ONLY IF IT LOOKS CLEAN TO THEM?
Cleanliness is the benchmark standard for about five out of six supermarket shoppers (83.3%); this isn't a make-or-break factor for the remaining sixth (16.7%).

Q2 Do you generally shop in a supermarket only if it looks clean to you?
Q3. WHAT IS CONSUMERS’ TYPICAL EXPERIENCE IN THE SUPERMARKET WHERE THEY SHOP MOST?
Nearly three-quarters of consumers (74.4%) call their primary supermarket “always clean.” The remaining quarter (25.3%) feel these stores are “occasional messy.”

Notably, about half in this latter group forgive these conditions and continue to shop there anyway, a behavior that displays some shopper tolerance. (The next question details this finding further.)

Q4. HAVE CONSUMERS EVER LEFT A SUPERMARKET THEY WERE SHOPPING IN BECAUSE IT WAS MESSY AT THE TIME?
More than one-third of U.S. adults (33.8%) have ended a supermarket trip once they observed messy conditions.

The other half (48.6%) that buy from the store anyway seem to tolerate messiness enough if convenience or other needs at the time prompt them to complete the trip. Another 17.6% don’t recall if they’ve ever left a food store under these circumstances.

Q4 Have you ever left a supermarket you were shopping in because it was messy at the time?
Answered: 574  Skipped: 31

Don't recall
Yes
No
Q5. WHAT IN A SUPERMARKET SAYS TO SHOPPERS MORE THAN ANYTHING ELSE THE STORE IS CLEAN?
The five traits that most powerfully signify “clean” to shoppers are:

- spotless floors (51.1%)
- clear, shiny glass cases by deli, prepared foods, cheese and bakery (43.2%)
- customer bathroom is well kept (42.0%)
- food handlers wear clean jackets, aprons or uniforms (39.0%)
- orderly shelves (30.0%)

These findings document the close connection in shoppers’ minds between a “clean” store and a “clean” dairy-deli-bakery department.

An anchor dairy-deli-bakery area that shows well with these “clean” traits supports the total-store perception of “clean,” and likely helps generate total-store trips and performance. These figures also suggest that a physically clean path to dairy-deli-bakery – where shoppers then experience a “clean” environment and view “clean” staff behaviors – generates widespread shoppers’ acceptance of the department.

Q5 What in a supermarket says to you more than anything else the store is clean? (check as many as three)

Q6. DO CONSUMERS GENERALLY BUY FROM A SUPERMARKET'S SERVICE DEPARTMENTS (SUCH AS DELI, PREPARED FOODS AND BAKERY) ONLY IF CONFIDENT IN THEIR FOOD SAFETY PRACTICES?
U.S. shoppers are pickier about service departments’ food safety methods - where food handling is often visible - than they are about shopping in a store that may look less clean and orderly than it should.

Overwhelmingly, 85.2% of survey respondents say they need to feel confident a deli-prepared foods-bakery department takes its food safety seriously before they’ll
buy there. A small minority (14.8%) will buy there anyway, “in a pinch,” even if they have some doubts.

This 85.2% figure exceeds the 83.3% who shop in a supermarket only if it looks clean to them. Since both figures depict strong consumer convictions, supermarkets should strive for excellence in both cleanliness and food safety practices.

Shoppers tend to scrutinize these service departments more than the rest of the store because, rather than wheel through, most wait in line for food to be ready. They have time to notice a lot, even small details.

**Q6** *Do you generally buy from a supermarket’s service departments (deli, prepared foods, bakery, etc.) only if you feel confident in their food safety practices?*

<table>
<thead>
<tr>
<th>Answered</th>
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No, I buy there sometimes if I’m in a pinch, whether I’m confident or...

Yes, I buy there only if I’m confident

Q7. **WHAT IN A SUPERMARKET SAYS MORE THAN ANYTHING ELSE ITS FOOD SAFETY PRACTICES ARE EXCELLENT?**

The five traits that most powerfully declare excellence to shoppers are:

- Pristine areas where food is handled (55.1%)
- Food handlers wash hands, change gloves often in full view of customers (55.1%)
- Highest grade from a food safety inspector, posted for customers to see (32.0%)
- Food handlers wear hair restraint (28.0%)
- Food handlers wear clean jackets, aprons or uniforms (27.3%)

Highly visible aspects of presentation tell shoppers how seriously a food store takes its food safety – and the degree of confidence these departments should inspire in shoppers. If temptation-driven orders are impulsive outcomes of deli and bakery lines, the judging of food safety practices is another. People see a lot in these open workspaces each visit, and what they think of what they see shapes their long-term...
purchase decision-making. Supermarkets should feel these eyes are on them – and set priorities to be consistently clean and disciplined in food-handling protocols and appearance to build credibility and consumer confidence.

Q7 What in a supermarket says to you more than anything else their food safety practices are excellent? (check as many as three)

![Chart showing percentage of responses](chart.png)

Q8. WHAT TYPE OF HAIR RESTRAINT SAYS “SAFETY” MOST TO CONSUMERS?
Two types of hair restraints stand apart from the rest, in consumers’ opinions. The “nearly invisible hair net” (41.9%) and the “shower cap-style hair net” (38.1%) show command in this category. By contrast, all other types of head coverings drew only nominal single-digit consumer nods.

Q8 What type of hair restraint says “safety” most to you? (check one only)

![Pie chart showing percentage of responses](chart.png)
SECTION 2: WHOM DO CONSUMERS TRUST?

Q9. WHICH KIND OF FOOD RETAILER DO CONSUMERS TRUST THE MOST WHEN IT COMES TO FOOD SAFETY?
Supermarkets are the kings of food safety. By a wide margin, shoppers trust grocers to keep them safe – they command the #1 position with 60.1% of mentions, which is triple the mentions level of specialty stores (20.0%), the #2 channel. All other food sellers are in the single digits.

Living up to this trust is a vast responsibility for supermarkets – especially at a time when food safety overall is a national issue on people’s minds. Sensitized shoppers have high expectations of consistent store-based excellence. This is particularly true in service areas where they interact with staff, get to know them if they’re regulars, and watch the serving process each time they order.

Q10. WHOM DO CUSTOMERS TRUST THE MOST WHEN IT COMES TO FOOD SAFETY IN THEIR PRIMARY SUPERMARKET?
Consumers point to managers of service perishables departments (such as deli, prepared foods, dairy, bakery, meat and seafood) as trustworthy in-store food safety experts. Nearly half of survey respondents (46.9%) cite department managers; this approaches 3x the mentions level of store managers (17.4%) and more than 4x the mentions of butchers (10.5%).
U.S. adult shoppers look to these managers to understand the regulatory picture and the latest in food safety approaches such as IDDBA's Safe Food matters! program and ServSafe® certification – as well as to enforce proven food safety protocols and prioritize new staff training so all counter staff can be as disciplined as veteran chefs, cheese mongers, bakers, butchers and fish mongers.

**Q10 In your primary supermarket, whom do you trust the most when it comes to food safety? (check one only)**

Answered: 652  Skipped: 53

- **Department Manager** 62.7% (259)
- **Store Manager** 23.2% (96)
- **Butcher** 14.0% (58)

**SECTION 3: WORKERS’ PHYSICAL APPEARANCE**
Q11. THINKING OF THE DELI-DAIRY-BAKERY WORKERS HANDLING FOOD IN SUPERMARKETS, HOW DOES THEIR PHYSICAL APPEARANCE AFFECT CONSUMER CONFIDENCE IN FOOD SAFETY?
1=LEAST CONFIDENT, LEAST DESIRE TO SHOP THERE
5=MOST CONFIDENT, MOST DESIRE TO SHOP THERE

The ways that staffers dress and groom themselves convey powerful messages about a supermarket’s commitment to food safety. This survey question measured consumer response to 34 distinct traits.

On the positive side, the ten physical traits that inspire the most consumer confidence in food safety are:

- Wear clear disposable gloves (57.7% score this a 5 – most confident)
- Wear hair restraint (55.9%)
- Wear clean jackets, aprons or uniforms (55.8%)
- Wear translucent disposable gloves (44.1%)
- A department manager certified in food safety is present (43.2%)
- Wear beard restraint (41.3%)
- Long hair restrained (39.5%)
- Wear white disposable gloves (36.7%)
- Wear bright blue or purple disposable gloves (25.3%)
- Chefs and all food handlers visibly carry a thermometer (25.2%)

On the negative side, the ten physical traits that drag down confidence levels in a store’s food safety are:

- Has a cold - sneezes, coughs (67.6% score this a 1 – least confident)
- Visible wound (61.1%)
- Long hair unrestrained (55.7%)
- Visible bandages (47.6%)
- Bushy beard (39.5%)
- Long sideburns bushy (32.2%)
- Mustache bushy (31.9%)
- False fingernails (28.0%)
- Body piercings (23.6%)
- Acne, blackheads (23.4%)
SECTION 4: THE DAIRY-DELI-BAKERY PHYSICAL SETTING

Q12. PLEASE SCORE EACH OF THE FOLLOWING PHYSICAL TRAITS OF THE DAIRY-DELI-BAKERY AREA.
1=LEAST CONFIDENT, LEAST DESIRE TO SHOP THERE
5=MOST CONFIDENT, MOST DESIRE TO SHOP THERE

Shoppers begin to form opinions about food safety in this section of the store as soon as they approach and the physical setting comes into view. The environment in which staffers operate, and the presence of certain equipment and devices, either raise or lower shopper confidence in food safety and the desire to buy there. This survey question measured 17 distinct traits.

On the positive side, the ten physical elements that inspire the most confidence in this section’s food safety are:

- Clean floors (66.3% score this a 5 – most confident)
- Scales and slicers that look clean (63.1%)
- Thermometers on showcases/coolers/freezers that shoppers could see (53.2%)
- Bright overhead lights (52.5%)
- Bright showcase lights (50.3%)
- Hot holding stations for prepared foods with sneeze guards (50.0%)
- Food temperature logs that shoppers could see in-store or online (42.3%)
- Refrigerated cases that hold pre-sliced meats, cheeses, salad items (37.2%)
- Refrigerated cases that hold pickup orders (34.4%)
- Staffed demonstration/sampling tables (29.1%)
On the negative side, the five physical traits that reduce confidence levels in this section’s food safety are:

- Hot holding stations for prepared foods without sneeze guards (35.2% score this a 1 – least confident)
- Visible pest control devices – bug zappers, rodent and insect traps (31.0%)
- Dim showcase lights (29.5%)
- Dim overhead lights (27.7%)
- Take-your-own samples of breads, cookies, cakes from sampling fixture (21.6%)

All other “1” scores were in the single digits.

Q13. PLEASE SCORE EACH OF THE FOLLOWING PHYSICAL TRAITS OF THE STORE BATHROOM.

1=LEAST CONFIDENT, LEAST DESIRE TO SHOP THERE
5=MOST CONFIDENT, MOST DESIRE TO SHOP THERE

An unclean bathroom is a dagger to shopper perceptions of food safety within the store - and especially within service areas such as dairy-deli-bakery where staffers handle and serve food in open view. Nearly three-quarters of survey respondents (73.6%) score an unclean bathroom a “1,” driving purchase confidence down to the lowest level.

By contrast, a clean bathroom with soap earns the most confidence and the highest rating of “5” from nearly three-quarters of consumers (74.4%) for effective hand washing. People are split about drying tactics – 51.8% score a clean bathroom with paper towels a “5,” while 50.4% rate a clean bathroom with air hand dryers a “5.”
Q14. PLEASE SCORE EACH OF THE FOLLOWING VISIBLE CUES THAT SHOW COMMITMENT TO FOOD SAFETY.
1=LEAST CONFIDENT, LEAST DESIRE TO SHOP THERE
5=MOST CONFIDENT, MOST DESIRE TO SHOP THERE

Shoppers respond in an extremely positive manner to select visual cues that denote high levels of food safety in a dairy-deli-bakery section of the supermarket. Seven out of the eight cues listed here received the highest possible score of “5” from about half of the survey respondents. Weigh in scores of “4” as well, and all are easily in majority territory. This means these cues silently amp up shopper confidence in food safety and receptivity to buy there.

Consider this a checklist of retailer must-dos to pave the way for departmental growth. These are the Top 5 signs that drew the loftiest positive feelings:
- Sign that shows the highest grade from a food safety inspector (58.2% score this a 5 – most confident)
- Sign that shows food safety training certification (51.6%)
- Sign that shows employees must wear hair restraint (51.2%)
- Sign that shows employees must wear gloves and change them between tasks (50.7%)
- Sign that shows the department manager on-site is certified in food safety (49.4%)

Q15. WHERE SHOULD STORES POST THESE SIGNS TO MAKE SHOPPERS MOST CONFIDENT IN A STORE’S FOOD SAFETY PRACTICES?

Signs are most persuasive when placed near the points of activity, note consumers.

Nearly three-quarters of survey respondents (71.6%) say signs “by the deli case” inspire their greatest confidence and make them likeliest to buy. “By prepared foods” is the second most popular choice (61.0%). “By the bakery” is third (58.9%).

A majority of U.S. adults believe that “multiple postings are more convincing, more likely to be seen” (51.0%).
SECTION 5: CLEANING, HYGIENE, PREPARING & SERVING PRACTICES

Q16. PLEASE SCORE EACH OF THE FOLLOWING CLEANING ACTIVITIES IN FRONT OF CUSTOMERS.
1=LEAST CONFIDENT, LEAST DESIRE TO SHOP THERE
5=MOST CONFIDENT, MOST DESIRE TO SHOP THERE

Not all cleaning is virtuous in the eyes of consumers. Proper cleaning does help convey a store’s commitment to food safety, but improper cleaning can damage the department’s image and repel shoppers.

The difference is in the condition of cleaning cloths, observe survey respondents. Identical cleaning processes drew either “1’s” (least confident in food safety) or “5’s” (most confident), depending on whether cloths were “questionable” or “obviously clean.”

Here are the specific positive results:
- Wipe slicers with obviously clean cloths and/or sanitizing solution (67.7% score this a 5 – most confident)
- Wipe counters with obviously clean cloths and/or sanitizing solution (66.2%)
- Wipe trays with obviously clean cloths and/or sanitizing solution (65.5%)
- Wipe scales with obviously clean cloths and/or sanitizing solution (65.4%)

Here are the specific negative results:
• Wipe trays with questionable cloths (55.8% score this a 1 – least confident)
• Wipe scales with questionable cloths (55.8%)
• Wipe slicers with questionable cloths (55.5%)
• Wipe counters with questionable cloths (53.7%)

Two other common cleaning activities done in front of customers that drew “5’s” from a majority of consumers: empty trash (52.5%) and sweep or mop floors (50.9%).

Q17. PLEASE SCORE EACH OF THE FOLLOWING EMPLOYEE HYGIENE HABITS.
1=LEAST CONFIDENT, LEAST DESIRE TO SHOP THERE
5=MOST CONFIDENT, MOST DESIRE TO SHOP THERE

Consumers feel food handlers can’t wash their hands enough – especially when they perform other tasks that could compromise clean. Because dirty hands can spread illness, stores must get this basic right – or risk a health incident and a hurt reputation. Stores that train and reinforce food workers to practice excellent hygiene habits reduce this risk.

The way consumers answered this question shows their depths of disgust when workers slack on proper hygiene.

True, on the positive side, 75.3% of consumers score “wash hands” a “5,” inspiring confidence in food safety, and 57.0% score “wash hands every time they change gloves” a “5” too.

Yet nine other less-diligent behaviors drew consumer disdain. For example:
• Do not wash hands and replace gloves/cots after emptying trash (70.5% rate this a 1 – least confident)
• Do not wash hands and replace gloves/cots after visiting bathroom (70.1%)
• Do not wash hands and replace gloves/cots after tending to a spill (67.3%)
• Do not wash hands and replace gloves/cots after handling money (64.2%)
• Do not wash hands and replace gloves/cots after cleaning equipment (62.9%)

Q18. PLEASE SCORE EACH OF THE FOLLOWING CUSTOMER-SERVING PRACTICES.
1=LEAST CONFIDENT, LEAST DESIRE TO SHOP THERE
5=MOST CONFIDENT, MOST DESIRE TO SHOP THERE

Shoppers definitely judge the care and precision with which dairy-deli-bakery workers prepare, pack and serve them food. People know to stay safe requires servers to comply with best practices, not just be neat and courteous.

Of 11 separate serving activities listed in this question, these five inspire the most consumer confidence in food safety:
• Place foods so they don’t touch/cross-contaminate (61.6% score this a 5 – most confident)
• Wrap food quickly after slicing (57.4%)
• Check temperatures of hot and cold food areas (56.0%)
• Spoon carefully from display bowls (53.2%)
• Spoon salads carefully into containers (49.6%)

Only two of the serving activities raised concern about food safety – and both of these relate to giving shoppers an extra treat. They are:
• Set out take-your-own-samples plates (19.4% rate this a 1 and 13.7% rate it a 2, at the “least confident” end of the scale)
• Hand customers free tastes when slicing their order, usually at counter (5.8% rate this a 1 and 6.0% rate it a 2)

Q19. PLEASE SCORE EACH OF THE FOLLOWING ORDER-PREPARATION PRACTICES.
1=LEAST CONFIDENT, LEAST DESIRE TO SHOP THERE
5=MOST CONFIDENT, MOST DESIRE TO SHOP THERE

Consumers want food servers to use deli tissue when preparing and assembling their orders – it makes them more confident in food safety and likelier to buy. By contrast, people express doubts about certain glove practices.

These two activities impress with their positive scores:
• Slice meat, cheese onto deli tissue (58.4% rate this a 5 – most confident)
• Use deli tissue and place it into bag with product (54.9% rate this a 5)

These three activities stand out for their negative scores:
• Use gloved hand that has already handled other product on scale (34.1% score this a 1, and 16.4% score it a 2, at the “least confident” end of the scale)
• Touch non-food contact surfaces with gloved hand (18.3% score this a 1, and 17.3% score it a 2)
• Slice meat, cheese onto gloved hand (5.6% score this a 1, and 9.9% score it a 2)
Q20. PLEASE SCORE EACH OF THE FOLLOWING LARGE-ORDER PREPARATION PRACTICES (PARTY PLATTERS, DELI TRAYS).
1=LEAST CONFIDENT, LEAST DESIRE TO SHOP THERE
5=MOST CONFIDENT, MOST DESIRE TO SHOP THERE
Most consumers endorse these three practices to help maintain temperature integrity of large dairy-deli-bakery orders during transport. They are:

- Schedule order execution to minimize holding/storage time (50.0% score this a 5, and 22.8% score it a 4 – at the “most confident in food safety/likelier to buy” end of the scale.
- Place in thermal soft case to maintain correct temperature (44.1% score this a 5, and 25.8% score it a 4)
- Use cold packs to maintain correct temperature (40.7% score this a 5, and 23.0% score it a 4)

Q20 On a scale of 1 to 5, where 1 means you feel least confident (least desire to shop there) and 5 you feel most confident (most desire to shop there), please score each of the following LARGE ORDER-PREPARATION PRACTICES (party platters, deli trays):

![Score Distribution Graph]

SECTION 6: SAFETY-MONEY-TIME TRADEOFFS

Q21. ARE SHOPPERS OK WITH HIGHER MONEY AND TIME COSTS - IF A SUPERMARKET DAIRY-DELI-BAKERY COMMITS TO STATE-OF-THE-ART FOOD SAFETY PRACTICES?
Not so fast, say consumers. Most do green light the higher expenses of food safety, though not by a convincing margin.
Despite all their scrutiny of food safety practices in this part of the store, consumers do seem split on digging deeper into their wallets and time budgets to ensure best practices. These answers do support retailer investment in better food safety, but don’t indicate stores could easily pass these costs along or slow down service to ensure superior safety protocols are met.

Nearly six in 10 U.S. adults (58.3%) are OK with slower service, while slightly fewer respondents (56.9%) are OK with higher prices. If this is a sign of today’s economic times, these figures could grow favorably if household pressures ease.

**Q21** If your supermarket deli-dairy-bakery were to commit to state-of-the-art food safety practices, it could cost you more in money and time. Tell us if you’d be OK or NOT OK with these tradeoffs:

![Chart showing percentages of consumers who are OK or NOT OK with higher prices versus slower service.]

Q22. WILL THIS COMMITMENT INFLUENCE THE NUMBER OF VISITS SHOPPERS MAKE TO THIS STORE?
Supermarkets that commit to best practices in food safety will earn more total trips from shoppers. A slight majority of survey respondents (52.4%) say they would shop more at this specific store – that’s more trips from most customers - while about one-third anticipate no difference in their trip frequency.

A retail strategy to generate more trips through superior food safety practices could be effective for several reasons: To differentiate specific operators from competitors that sell food. To generate more revenue, profits, market share, and word-of-mouth referrals within trading areas. To seem more logical and less selfish to customers than dairy-deli-bakery price hikes would appear. To reduce the risk of making customers ill.
Q23. WILL THIS COMMITMENT INFLUENCE TRANSACTION SIZE IN THE STORE’S DAIRY-DELI-BAKERY?
Well over one-third of consumers (38.7%) say they will spend more at a dairy-deli-bakery with superior food safety practices in place. The more people correlate safety with confidence and comfort in the foods for sale, the likelier a supermarket dairy-deli-bakery could compete as a destination for larger, lucrative eating occasions such as graduation party catering.
SECTION 7: FOOD SAFETY TOPICS

Q24. HOW MUCH CONSUMERS FEEL THEY KNOW ABOUT FOOD SAFETY TOPICS
1=NOTHING
5=A LOT
While consumers are familiar with the general notion of food safety, they confess they are far less than expert on specific diseases, contaminants, and certain guidelines stores ought to follow to keep them safe.

The pretty even distribution of answers across the 1 to 5 scale – from “know nothing” to “know a lot” - shows their knowledge gaps on key topics.

Fewer than 1 in 4 U.S. adults say their insights on four common diseases (listeria monocytogenes, E.coli, salmonella and shigellosis) deserve a “5” score. A barely bigger share of consumers says they know time and temperature guidelines well enough for a “5.” And fewer than 1 in 3 feel they know enough about contamination to rate a “5.”

To span these knowledge gaps, supermarkets can build authority while teaching shoppers about exhaustive steps taken to ensure food safety, and why these steps are critical and ongoing. This will instill trust and confidence in specific stores, and make people likelier to buy there.

Q25. HOW MUCH CONSUMERS CARE ABOUT THESE FOOD SAFETY TOPICS
1=VERY LITTLE
5=A LOT
Survey responses reflect how deeply people care about these food safety topics. Answers skew heavily towards the “4” and “5” scores – every topic has between nearly two-thirds and nearly three-quarters of U.S. adults saying so. These are the specific combined “4” and “5” totals:
- Shigellosis, 64.9% combined
- Listeria monocytogenes, 66.6%

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• Safe time and temperature guidelines for cold items, 71.5%
• Safe time and temperature guidelines for hot items, 71.7%
• Physical contaminants, 72.5%
• E.coli, 73.1%
• Cross-contamination, 74.1%
• Salmonella, 74.9%

As much as people care about these topics, they don’t know much about them. They have to trust someone to prepare and serve them food. It might as well be supermarkets that excel in food safety and act as professionals; these stores will impress and earn the confidence of customers to protect them from potential food problems.

Q26. RATE PACKAGING OF DAIRY-DELI-BAKERY FOOD TYPES FOR SAFETY
1=LEAST SAFE
5=MOST SAFE

Consumers are consistent. They show their greatest confidence in dairy and deli items that are sliced, weighed and packed to order while they could watch. This is less about theater and more about knowing when and how the order was done, as well as having confidence the food never left its proper temperature range.

They show their consistent least confidence in pre-sliced, pre-weighed or pre-packaged dairy and deli items – because they don’t know how long these packages were on display or how many bacteria-laden hands (other shoppers) touched them.

To compare:
• Consumers view deli meats “packed to order” more than 2x as safe as “pre-sliced,” judging by the “most safe 5” scores each earned – 37.3% vs. 16.2%.
• A similar story in cheese, where “packed to order” notches a “5” score from 35.5% of survey takers vs. 17.9% for “pre-sliced.”
• In deli salads, the difference is less pronounced – “packed to order” has a “5” score from 27.5% of respondents vs. 18.3% for “pre-weighed.”
Meanwhile, the packaged, branded versions of deli meats, cheeses and deli salads draw the medium level of consumer confidence in food safety.

Bakery items show a similar pattern. “Made from scratch in the store” earns the highest share of “most safe 5” ratings (37.3%), while pre-packaged items are in the middle (32.3%), and “pre-made bake-off” goods draw the least confidence (24.5%).
APPENDIX

CONSUMER VERBATIMS –
WHAT WOULD YOUR IDEAL DELI, DAIRY-CHEESE AREA, AND BAKERY DO TO MAKE YOU TOTALLY CONFIDENT IN ITS FOOD SAFETY PRACTICES?

“Eliminate the all-day salad bar. I don’t think it gets used much and it is open for just anyone to use. I don’t think that is the best idea”

“Change gloves between each customer”

“Place labels on items that show date and time items was made”

“Have smaller portions of the "homemade" salads in the case keeping larger containers in the walk-in so they can keep the stuff in the case looking fresh, as those cases usually aren’t kept as cool as the walk-in”

“Just fresh meat and salads with clean environment, hair nets, gloves and smiley faces”

“My ideal deli would require workers to have no physical contact with customers. They could put the food on a circular/revolving tray that could be turned so customers could pick up their order, rather than directly hand the product to the customer’s hand”

“Have more employees helping out to ensure safety. There is never enough people in the deli”

“For me what I would be reassured them very hygienic when giving the products the person who give these products is properly dressed in a good shape and very hygienic”

“Provide more specific details about the process associated with making the cheese”

“Only prepare upon request so meat does not dry out while sitting out in tray”

“Frequently check temps and keep a log visible in the area”

“Wipe the surface of the tray every time, prior to a product being placed on it”

“Post certifications”

“My ideal deli would tell me the dates of when the cheese was made and whether or not it has GMOs”

“Bake somewhere visible to customers”
Focus on Listeria

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