FSA Small and Micro FBO Tracking Survey Wave 3 2021

Food Standards Agency

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Contents

1. Executive Summary

In 2021, the Food Standards Agency (FSA) commissioned IFF Research to undertake a survey of small and micro Food Business Operator (FBO) sites in England, Wales and Northern Ireland. This represents the third wave of an annual tracking survey with the following aims:

- To gain insight, and understand the implications of UK's exit from the European Union (EU) on small and micro enterprises

- To ‘unpack’ attitudes towards regulation and deepen insights and knowledge of small and micro enterprises

- To measure trust in the FSA and extent to which the FSA is considered a modern, accountable regulator

Fieldwork was conducted in November and December 2021 and comprised 700 interviews with small (10-49 employees) and micro (fewer than 10 employees) FBOs.

Previous waves of this annual tracking survey were conducted in 2018 and 2019. Due to the COVID-19 pandemic, the survey was not carried out in 2020. The 2021 survey is the first wave of the tracker to run following both the pandemic and the end of the transition period for the UK leaving the European Union (EU). This impact should be considered when interpreting findings throughout the report.

In line with the approach taken in previous years, FBOs in Wales and Northern Ireland were over-sampled to ensure there was a robust sample for analysis in these nations. The data was then weighted to be representative of the in-scope micro and small FBO population across England, Wales and Northern Ireland at the time of sampling. In a change from previous waves, Primary Food Producers (PFPs) were not in the target population for the 2021 survey.

Online Sales and the use of third-party platforms

In 2021 the majority (60%) of businesses had a website, an increase from 51% in 2019. Businesses were increasingly likely to use their website to take food and drink orders. A quarter (26%) of businesses that had a website used it to take food or drink orders in 2021, compared to 2019 when 30% of businesses said they use their website to serve customers (this is not a statistically significant decrease however). Almost three quarters (71%) of businesses used some form of social media, again an increase from 2019 (64%), although, consistent with 2019 findings, only 16% of businesses trading online used their social media accounts to take food or drink orders. The most common third-party platforms used were Deliveroo and Uber eats.

For the majority of businesses trading online (67%), online sales made up less than a quarter of their total sales turnover. However, there were indications that the COVID-19 pandemic has increased online sales. Almost a quarter (22%) of businesses had started trading online since the start of the pandemic and a further 36% said their online sales had increased as a result of the pandemic.

Main concerns and recruitment challenges

All businesses were read a list of 10 potential concerns, threats or barriers to the success of their business. The vast majority (86%) of businesses identified at least one threat that currently applied to their business, most commonly the availability of food supplies/disruption in the supply chain[1] (55%) and changes in consumer behaviour and demand due to COVID-19 (54%). Covid-19 related threats seemed to particularly affect businesses in service activities sector. There has been a considerable shift in the profile of threats to businesses since 2019, when the most cited concern was competition in the market.

Around a third (34%) of businesses cited staff recruitment and skills as a potential barrier to the success of their business (an increase from 28% in 2019). These businesses were asked to specify which staff they were struggling to recruit, and most cited waiting and customer facing staff (42%), followed by workers with specialist skills such as chefs and butchers (36%).

Impact of the UK leaving the European Union

All businesses were asked what impact the UK's exit from the EU had on their businesses up to this point. Just over half (53%) reported that it had any impact (be that positive, negative or mixed), with a third (33%) reporting a negative impact, 18% a mixed impact and 2% a positive impact (compared to 14% of businesses who reported that they expected to experience a positive impact in 2019). Wholesalers

[1] It should be noted that at the time of survey (November – December 2021), the UK was experiencing widespread supply chain disruption, due in part to the impacts of COVID-19 and the UK exit from the European Union.

were the most likely to have been impacted because of the UK's exit from the EU (80%), whereas those in the accommodation sector were the least likely (49%). Typically, the UK's exit from the EU has affected profit margins, or resulted in higher costs, although a sizeable proportion also noted that the availability of food has decreased.

In 2021, businesses were also asked what kind of impact they expected the UK's exit to have on their business over the next few years. Just over half (52%) expected there to be further impact over the next few years, typically expecting a negative impact (24%) or a mixed impact (22%).

How food safety information is provided to customers

All businesses who sell pre-packaged food were asked whether they were aware of Natasha's Law[2] which was introduced on October 1st, 2021. Four in every five businesses (79%) stated that they were aware of this law, with those in Northern Ireland less likely to be aware (61%) compared to those in England (80%) and Wales (81%).

Nearly all businesses (91%) reported that they provided information on allergens in the food and drinks that they sold. Businesses were slightly less likely to provide information on allergens that might be present due to cross contamination (79%). The most common ways for businesses to provide allergen information to customers were verbally on request (40%) or in writing on a separate notice on display (33%).

The majority of businesses (72%) have taken some steps to help customers make healthier choices. Typically, this included providing a wider range of healthier options (57%), changing ingredients or cooking methods (39%), and reducing portion sizes (25%).

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[2] Natasha's Law is the Food Information to Consumers (FIC) Regulation amendment making it compulsory to provide full ingredients labelling compulsory to for Pre-packaged for Direct Sale (PPDS) foods.

Information and guidance used by businesses

Around 9 in 10 respondents (89%) felt informed about regulations affecting their business, in line with findings from 2019 (90%). However, in 2021 there was a drop in the proportion who reported feeling ‘very well’ informed (27% vs. 42% in 2019).

Businesses were asked where they get information about food safety guidelines and regulations, food allergies and product recalls. Almost all (99%) cited at least one source, most commonly the FSA website (37%) or the local authority/district council (28%). Use of the FSA website was more common amongst businesses in the service activities sector[3] (42%), larger businesses (53% of those with 25-49 employees vs. 35% of sole traders) and those with a higher FHRS rating certificate (40% of those with FHRS rating 5 vs. 21% of those with FHRS rating 0-2).

When asked how staff and managers were provided with information and training on food safety guidelines and regulations, including food allergies, nearly all (98%) businesses reported providing some form of training. However, this often was not provided in a formal setting, with the most common form of training via verbal updates to staff (35%). Less than a quarter (23%) of businesses provided formal training for all new staff.

Overall, almost all (99.7%) of businesses reported that English was their preferred language for written communication about food regulations. Even amongst businesses with employees speaking other languages, only a small proportion (3%) indicated they would prefer to receive information both English and also another language (such as Amharic or Welsh). It should be noted however that businesses whose first language is not English may have been less likely to respond to this survey.

[3] The ‘service activities’ sector incorporates restaurants, cafes, pubs and other catering businesses.

Experiences and perceptions of the FSA

Almost all businesses had heard of the FSA (98%, in line with 97% in 2019) although only 29% reported that they knew 'a lot' about the FSA. Two-fifths (40%) of businesses reported some contact with FSA in the last 12 months, mainly via the website. Businesses who had contacted the FSA generally rated the experience highly on trustworthiness (an average score of 9.0 out of 10), clarity of communication (8.8 out of 10), ease of use/access (8.8 out of 10) and approachability (8.7 out of 10). Similar to findings from 2019, few businesses were subscribed to the FSA news and alerts service (9%, compared with 13% in 2019), with 69% not aware that this existed.

The vast majority of businesses felt confident that the FSA was achieving its aims and objectives, with 95% of all businesses stating they were confident that the FSA is influential in maintaining standards within the food industry and 93% confident that the FSA works hard to ensure that food safety and standards are maintained and improved. Businesses were least likely to feel confident that the FSA effectively communicates and promotes regulations within the food industry (84% confident).

Confidence in the food safety system

Most businesses had very positive perceptions of food safety or hygiene standards and regulations; 94% of businesses are confident that they are effective at protecting the public from food related risks and 91% are confident that food safety or hygiene standards and regulations are easy or practical to comply with. In terms of the way in which food businesses are monitored and checked, although the vast majority of businesses were still confident about these aspects, levels fell slightly – 86% were confident that monitoring and checks are conducted fairly and 81% were confident that they help ensure low performing food businesses improve.

When asked to think about the majority of food businesses in the UK, around 9 in 10 businesses felt confident that food is safe to eat (92%), clear allergen information is provided (90%), food labels are accurate (89%) and FHRS ratings are displayed (87%). However, less than three-quarters (73%) felt confident that people are not misled by the way that food is labelled, advertised, or marketed; suggesting potential room for improvement in this area.

Experience of food safety processes and interventions

In 2021, around two-fifths (41%) of businesses had experienced a food hygiene or standards inspection by their local authority (or, in the Northern Ireland by their District Council) in the last 12 months. This reflects a continued fall from 52% in 2019 and 63% in 2018. Food hygiene or standards inspections were much more common in the manufacturing sector (62%). By contrast only a quarter (25%) of accommodation businesses reported an inspection in the last 12 months.

There was an increase in 2021 in the proportion of businesses reporting registration or re-registration of a food business or new premises (10% vs. 7% in 2019) and an increase in businesses experiencing a food safety product recall or withdrawal (7% vs. 2% in 2019). However, the proportion of businesses receiving advice or training about meeting food safety standards remained stable (25% in 2021 and 2019).

Businesses who had experienced any of the product safety processes or interventions listed in the survey were asked about the clarity of the related communications. Overall, 94% of these businesses rated the communications they received to be clear, with three-quarters (75%) rating the communications as very clear.

Food crimes

One in five businesses (20%) had heard of the National Food Crime Unit (NFCU) in 2021, reflecting no significant change in the levels of awareness since 2019. Overall, the prevalence of food crime was low for micro and small food business operators, with 92% of businesses reporting they had not experienced any food crime in the last 12 months. Food theft was the most prevalent type of food crime, affecting 6% of businesses in the last 12 months. The majority of businesses reported low costs associated with food crimes (less than £1,000).

Only 16% of businesses who experienced food crime in the last 12 months reported it on all occasions, with a further 8% reporting crimes on some occasions. The combination of low costs to the business of food crime and the time taken to report the crime were the primary reasons for not reporting.

Importing and exporting activity

In 2021, only a small minority (4%) of businesses were importing, reflecting a downward trend in importing rates from 10% in 2019 and 15% in 2018. There was considerable variation in importing levels by sector. It was much more common in manufacturing (20%), wholesale (45%), and slightly more popular in retail businesses (7%) when compared to the overall average of 4%. It was less common in accommodation (1%) and service activities (3%).

A much smaller percentage (1%) were exporting in 2021, and this again reflects a downward trend from previous years (4% in 2019, 3% in 2018).

Looking to the next 12 months, very little change in importing or exporting is expected, with 96% of businesses expecting no change their current importing behaviour and 99% of businesses expecting no change in their exporting behaviour.

Small and Micro Food Business Operator (FBO) Tracker Survey: Wave 3 (2021)

Food Standards Agency food.gov.uk

IFF Research

FBO perceptions of the FSA

98% ..of businesses were aware of the FSA...

...and **29%** of businesses **knew a lot about the FSA**

40% ..of businesses who had heard of the FSA **had contact with them** in the last 12 months

95% felt confident the FSA is influential in maintaining standards

93% felt the FSA works hard to ensure food safety standards are maintained

90% felt the FSA is good at identifying where poor standards exist

Those who contacted the FSA rated these key metrics out of 10:

9.0: Trustworthiness
8.8: Ease of use / access
8.8: Clarity of comms
8.7: Approachability

Sources of information

89% of businesses felt informed about regulations affecting their business. **27%** felt **very** informed, down from 42% in 2019.

Information provided to customers

79% Provided info on cross contamination

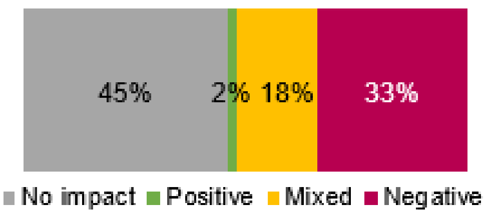
91% Provided info on allergens in food

An increase from **69%** in 2019

Businesses most often communicated allergen information **verbally on request (40%)** or in writing as a **separate notice on display (33%)**

Impact of EU exit on FBOs

Experienced impact of EU exit



Most common impacts of the EU exit:

Profit margins decreased or higher overall costs **(36%)**

Availability of food decreased **(33%)**

2. Background and methodology

Background to the survey and research objectives

The Food Standards Agency (FSA) has been tracking small and micro Food Business Operator (FBO) attitudes towards food-related topics, and trust in the FSA and food system, since 2018. This has helped inform engagement and intervention activity targeted at businesses with fewer than 50 staff.

The survey was initially developed to assess the perceived impact of changes as a result of the UK's exit from the European Union (EU), and the Achieving Business Compliance (ABC) programme, which aims to modernise the regulation of food businesses in England, Wales and Northern Ireland. Since then, it has evolved to regularly track small and micro FBO views on a range of subjects.

This represents the third wave of the annual tracking survey, and covers the following aims:

- To gain insight, and understand the implications of the EU Exit on small and micro enterprises
- To 'unpack' attitudes towards regulation and deepen insights and knowledge of small and micro enterprises, including with regards to the FSA's ABC priority
- To measure trust in the FSA and extent to which FSA is considered a modern, accountable regulator

This report comprises results of the third wave of this annual tracking survey, with previous waves conducted in 2018 and 2019. Due to the COVID-19 pandemic, the survey was not carried out in 2020. The 2021 survey is the first wave of the tracker to run following the COVID-19 pandemic and the end of the transition period for the UK leaving the European Union. The impact of these events should be considered when interpreting findings throughout the report.

Research methodology

Fieldwork was commissioned by the Food Standards Agency (FSA) and conducted by IFF Research, an independent research company. Following a period of cognitive fieldwork where the questionnaire was tested among a small subset of businesses, a total of 700 interviews were conducted via a Computer-Assisted Telephone Interviewing (CATI) methodology. This included a period of pilot fieldwork in October 2021, where 32 responses were captured, followed by mainstage fieldwork between November 15th and December 17th 2021. All interviews were with small (10-49 employees) and micro (less than 10 employees) FBOs based in England, Northern Ireland and Wales. The interviews lasted 25 minutes on average.

The sample was selected from the FSA's business database, and drawn using country, size and sector targets. Screener questions at the start of the survey ensured that only in-scope businesses completed the survey. In a change from previous waves, Primary Food Producers (PFPs) were not in scope for the 2021 survey. In line with the approach taken in 2018 and 2019, FBOs in Wales and Northern Ireland were over-sampled to ensure there was a robust sample for analysis in these nations. Efforts were also taken throughout fieldwork to encourage responses from businesses who did not speak English as a primary language, including the use of interviewers who were able to speak a range of languages.

The data was weighted to be representative of the in-scope micro and small FBO population across England, Northern Ireland and Wales at the time of sampling. Again, it should be noted 2021 weightings differ from previous waves due to the exclusion of Primary Food Producers.

Further detail on the achieved profile of respondents, sampling and weighting approach can be found in the technical annex.

Notes on the report

Throughout the report references to businesses size are based on number of employees unless otherwise specified. 'Larger' businesses refer to those with 25-49 employees. Sole trader refers to a self-employed business owner with no employees.

The term ‘service activities’ is used throughout the report as shorthand for the 'food and beverage service activities’ sector. This sector incorporates restaurants, cafes, pubs, and other catering businesses.

When percentages are provided in the text for sub-groups such as by size and sector, the sub-group percentage shown is statistically significantly different to the average of those not in this sub-group, at the 95% confidence level. The phrasing “most likely”, “more likely than average” or “particularly likely” etc. is used as a shorthand for this. All differences reported are statistically significant unless otherwise stated.

It should be noted that the base size for some groups is particularly small (lower than 50). Although findings reported for these subgroups are statistically significant, caution should be taken when interpreting these results due to small base size. Primarily, these groups are businesses with an FHRS rating on 0-2 (n=45), and sole traders (n=59). The base size for these subgroups are even lower when questions are routed to a subset of respondents.

Unless explicitly noted, all findings are based on weighted data. Unweighted bases (the number of responses from which the findings are derived) are displayed on tables and charts as appropriate, to give an indication of the robustness of results. The only exception to this is where questions have a low base size due to survey routing (asked to fewer than 50 respondents). In these instances, results are reported in a qualitative style, and unweighted figures are used (e.g. *6 out of 40 businesses*) rather than weighted percentages.

On charts, arrows are typically used to denote a significant difference between 2021 and 2019 findings, and asterisks are used to indicate a significant difference between a subgroup and the overall percentage. Please note that results may not always sum to 100% due to rounding and/or due to businesses being able to select more than one answer to a question.

3. Online Sales and the use of third-party platforms

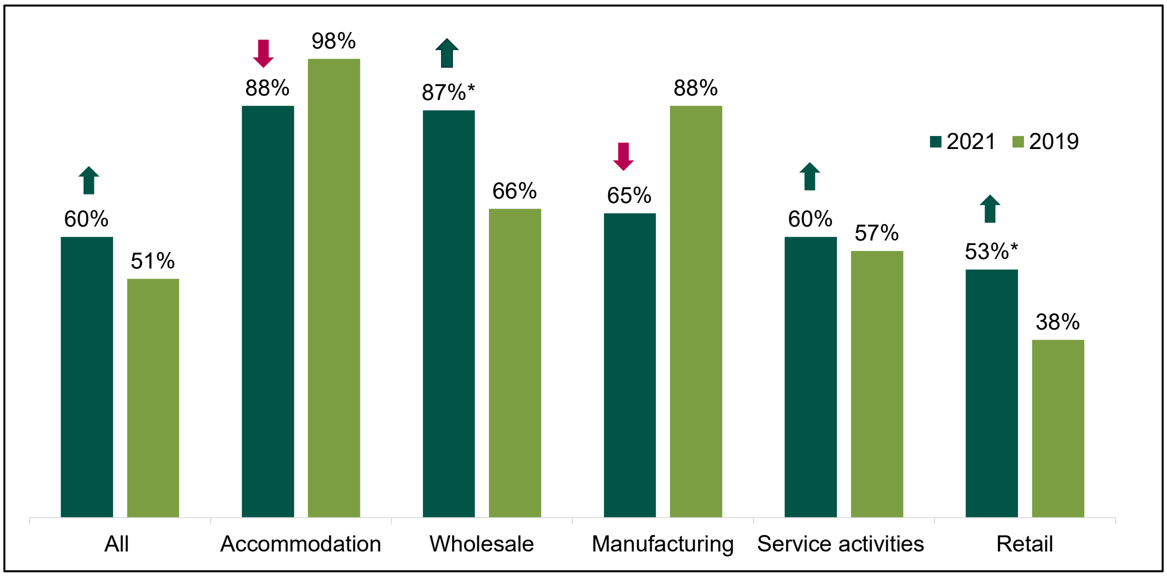
This chapter outlines the online presence of companies and how they use their own website, social media and third-party platforms when taking orders for food and drink.

Companies use of their own website.

In 2021, the majority (60%) of businesses had a website, an increase from 51% in 2019. This may be due to the COVID-19 pandemic which has encouraged businesses to enhance their online presence due the closure of shops and offices, and customers remaining at home to follow the guidelines set by the government.

As shown in Figure 3.1, businesses in the accommodation and wholesale sector were the most likely to have a website (88% and 87% respectively). However, compared with 2019, the proportion of businesses in the accommodation sector with a website has decreased (from 98% in 2019), while the proportion in the wholesale sector with their own website has increased (from 66% in 2019).

Figure 1.1 Proportion of businesses with a website



Base: All businesses 2021/2019 (700/644); Accommodation (110/116), Wholesale (82/62), Manufacturing (114/91), Service activities (256/224), Retail (138/110).

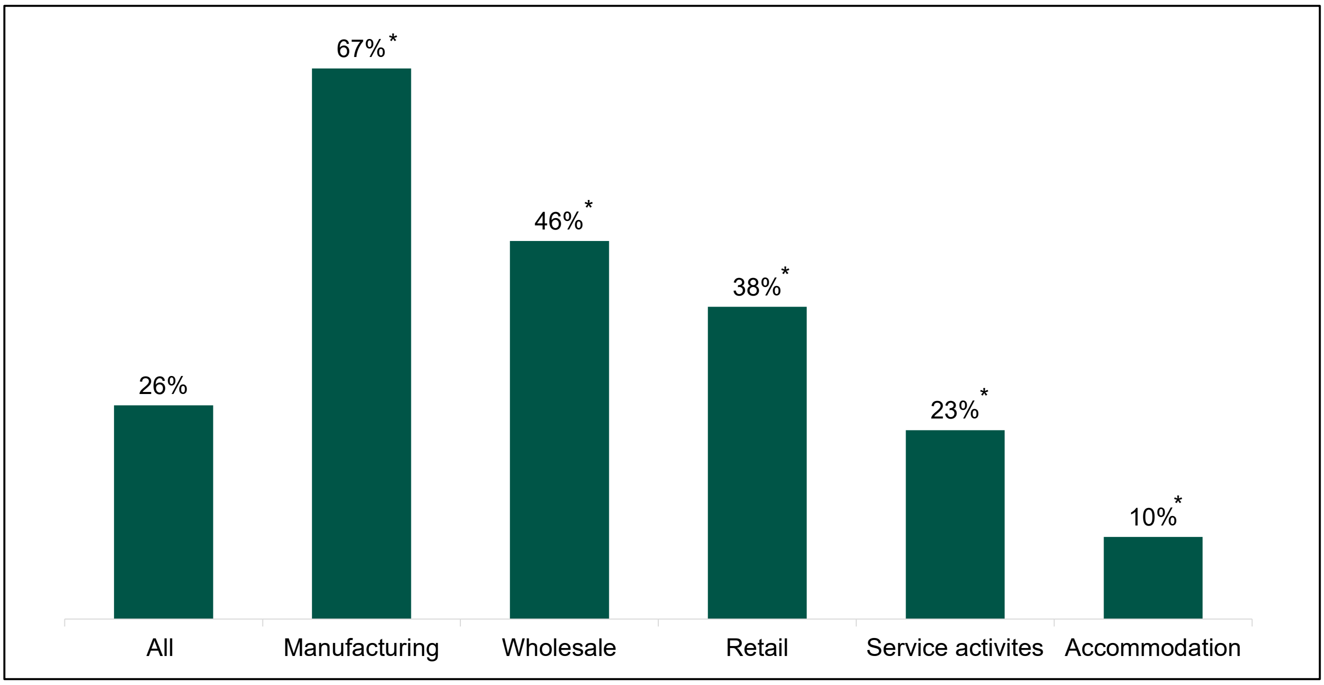
Arrows indicate significant difference from 2019. * Indicates significant difference from all in 2021

Businesses in England were more likely to have a website (61%) compared to Northern Ireland (45%) and Wales (42%). By size those with 25-49 employers were the most likely to have their own website (86%), while those with less than 10 employers were the least likely to (55%). However sole traders were more likely than those with 2-9 employers to have their own website (60% vs 55%).

Taking food and drink orders through the website

In 2021, around a quarter (26%) of businesses that had a website reported they used it to take food or drink orders, compared to 2019 when 30% of businesses said they use their website to serve customers (this is not a statistically significant decrease). This equates to 15% of all businesses taking food and drink orders through their website in 2021 and 15% of all businesses serving customers through their website in 2019 (due to the fact there are more businesses with a website in 2021). As shown in Figure 3.2, businesses in the manufacturing sector were the most likely take orders through their website (67%) while businesses in the accommodation sector were the least likely (10%).

Figure 1.2 Proportion of businesses who take food or drink orders through their website

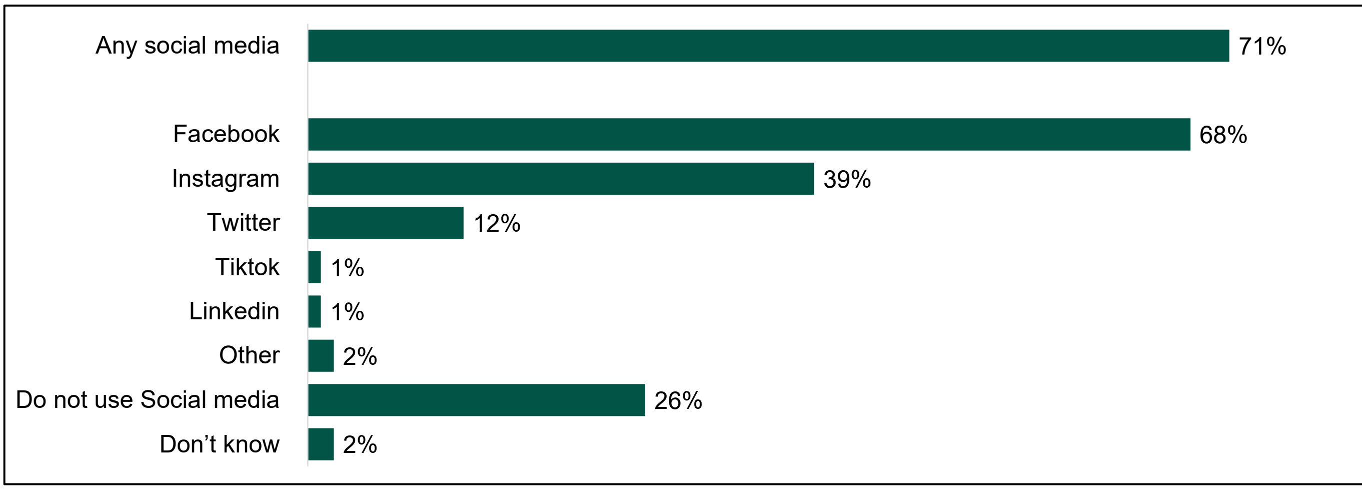


Base: All businesses with a website (470). Manufacturing (72), Wholesale (70), Retail (77), Service activities (156), Accommodation (95). * Indicates significant difference from all

Businesses' use of social media

All businesses were asked which, if any, social media accounts their business used. In 2021, almost three-quarters (71%) of businesses had some form of social media presence, an increase from 64% in 2019. As shown in Figure 3.3 the most common social media accounts in 2021 were Facebook (68%) and Instagram (39%).

Figure 1.3 Social media accounts used by businesses

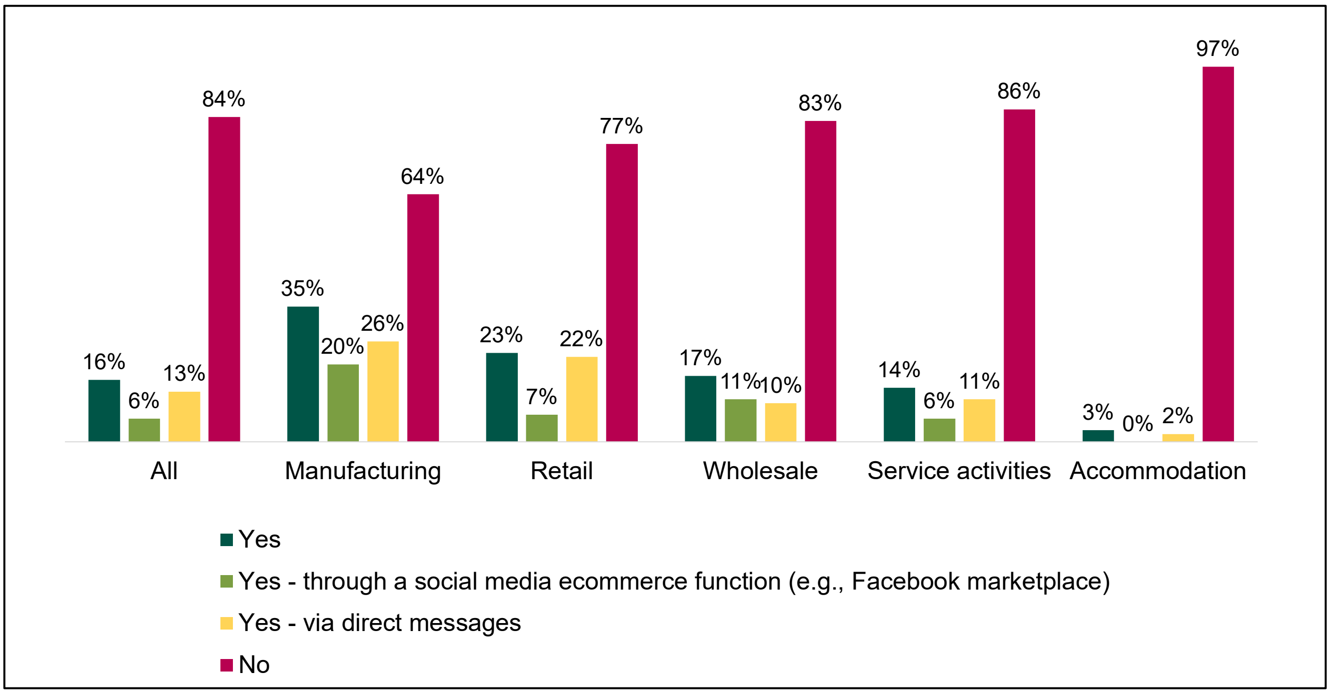


Base: All businesses (mainstage only) (668).

Sole traders were the least likely to have a social media account (58%), compared to 90% of those with 10-24 employees and 82% of those with 25-49 employees.

Among businesses that trade online, 16% of businesses used their social media accounts to take orders, while the majority did not (84%), as seen in Figure 3.4. Businesses that did take orders through social media mostly did so through direct message (13%), followed by social media ecommerce function (6%). Businesses within the manufacturing sector were the most likely to use social media to take orders (35%), while those in accommodation were the least likely to (3%).

Figure 1.4 Proportion of businesses that take food or drinks orders through social media



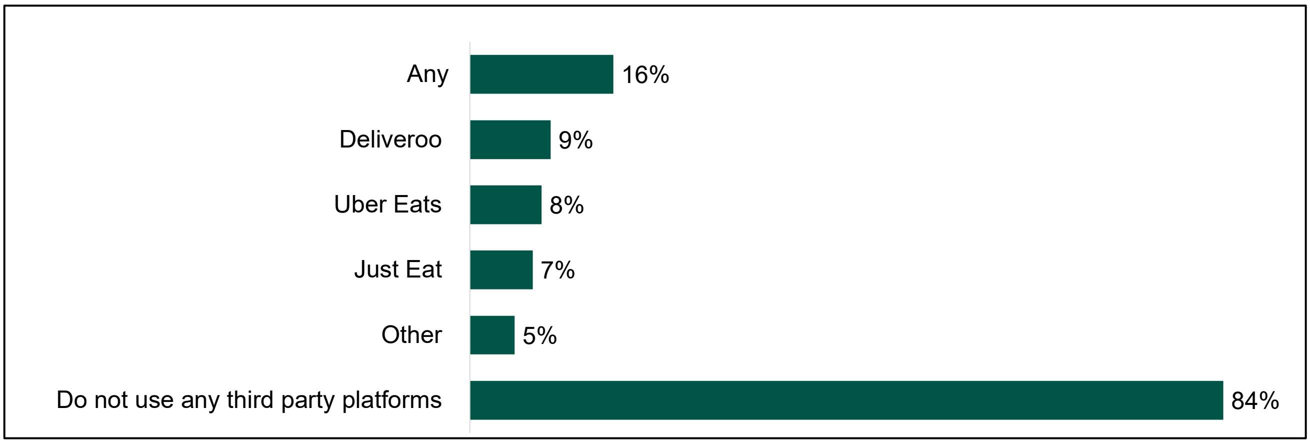
Base: All businesses. (700). Manufacturing (82), Retail (93), Wholesale (60), Service activities (197), Accommodation (78).

The use of third-party platforms

In 2021, 16% of businesses used third party platforms to sell food or drink, in line with findings from 2019 (15%). The most common third-party platform used by businesses was Deliveroo (9%), closely followed by Uber Eats (8%).

Service activities were the most likely to use some form of third-party platform (20%) compared to any other sector, with accommodation being the least likely to (1%). Service activities equally used Deliveroo and Just Eat (11%) and were more likely to do so than other businesses. According to business size, those with less than 10 employees were the most likely to use third party platforms (18%) with this mostly being made up of businesses with 2-9 employees, who were the most likely to use it (20%). None of the sole traders surveyed used any of third-party platforms (0%). Businesses with 2-9 employees were most likely to rely on Deliveroo compared to any other platform (11%).

Figure 1.5 Use of third-party platforms to sell food and drink



Base: All businesses. (700).

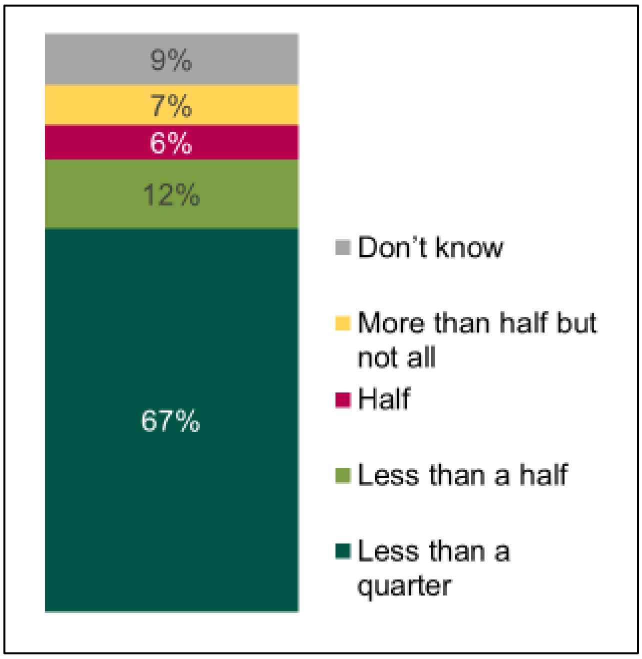
Businesses that trade online were asked if they did so using another business name. Only 8% of businesses reported that they did.

Online sales

All businesses that trade online were asked how much of their sales turnover was currently accounted for by online sales, across all platforms used. As shown in Figure 3.6, the majority (67%) said that less than a quarter of their sales turnover was accounted for by online sales, and a further 12% said less than a half.

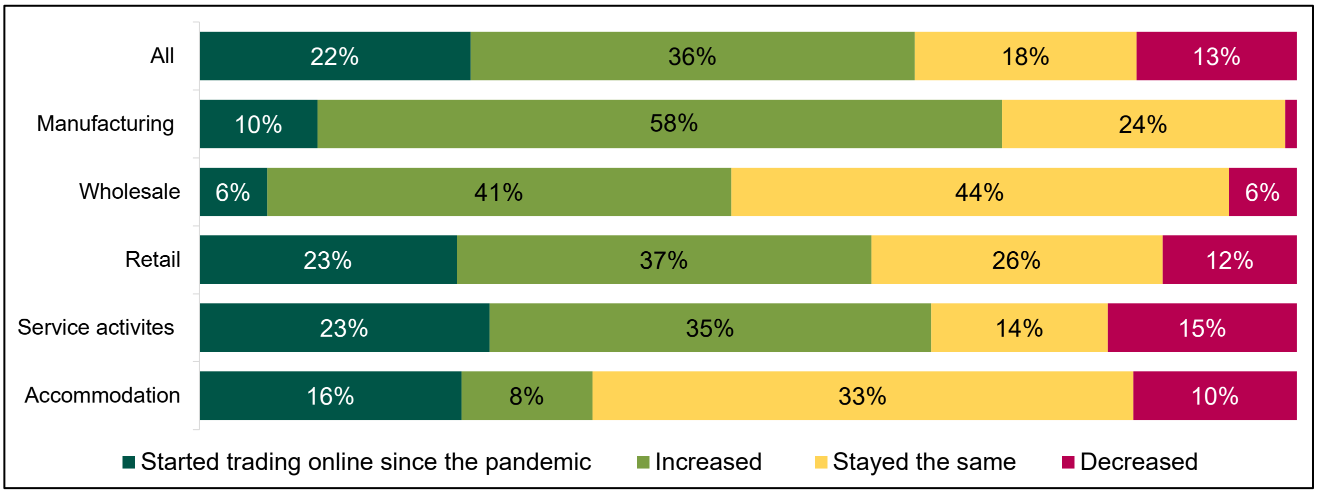
Businesses that had been trading online for more than two years were asked if their online sales had changed since the start of the COVID-19 pandemic. Over a third (36%) said that it had increased, 13% said that it had decreased and 18% said that it had stayed the same. Those in the manufacturing sector were the most likely to report that their online sales had increased (58%).

Figure 1.6 Sales turnover accounted for by online sales



Base: All businesses that trade online. (240).

Figure 1.7 How online sales have changed since the start of the COVID-19 pandemic



Base: Those who trade online and have been trading more than two years (216); Manufacturing (64), Wholesale (36), Retail (45), Service activities (62), Accommodation (9).

Businesses with more than 10 employees were the most likely to have said that their online sales increased over the pandemic (45%[4]), compared to 24% of sole traders.

4. Main concerns and recruitment challenges

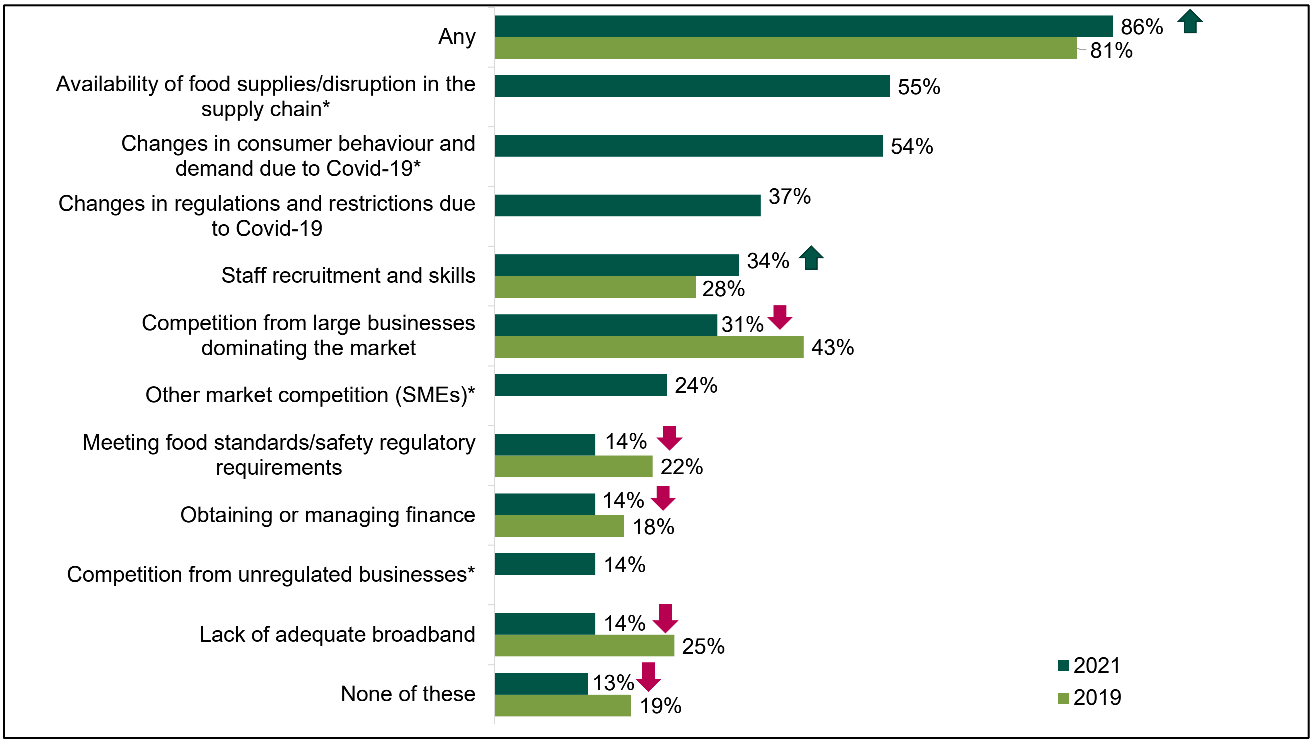
This chapter investigates the main threats and barriers that businesses face, and details the types of staff that businesses are struggling to recruit at the moment.

Barriers facing businesses

Businesses were presented with a list of potential threats and concerns and asked to select which they felt were particular barriers to the success of their business. As seen in Figure 4.1, 86% said at least one of the listed threats was a barrier to the success of their business. The most common threat was the availability of food supplies or disruption in the supply chain (55%), followed by changes in consumer behaviour and demand due to COVID-19 (54%). This has changed since the 2019 wave when the biggest concern for businesses was competition in the market (43%), whilst in 2021, only 31% of businesses reported this as a barrier. It should be noted that at the time of survey (November – December 2021), the UK was experiencing widespread supply chain disruption, due in part to the impacts of COVID-19 and the UK exit from the European Union.

[4] Due to small base size finding is not statistically significant, should be treated as indicative only.

Figure 1.8 Threats and concerns that are barriers to the success of businesses



Base: All businesses 2021. (700). All businesses. 2019. (644). Arrows indicate significant difference from 2019. Asterisks indicate new code for 2021. Note- wording varies between 2021 and 2019.

As seen in Table 4.1 concerns around the availability of food supplies/ distribution in the supply chain were more commonly reported by businesses in Wales (71%) compared to those in England (54%) and Northern Ireland (57%). Businesses in Wales were notably less likely than those in England to say that none of the listed concerns or threats were a barrier to their business (7% vs. 14%).

FBOs with 10-24 employees were the most likely to think they had at least one barrier to the success of their businesses (92%), while sole traders were the least likely to think this (76%). The biggest threat to businesses with 10-24 employees was the availability of food supplies/ disruption to supply chain (69%), whilst sole traders were the least concerned by this (22%). Sole traders were more likely to find changes in consumer behaviour and demand due to COVID-19 as their biggest threat (50%).

Manufacturing businesses were the most likely to report they had at least one barrier to the success of their business (93%), whilst businesses in the accommodation sector were the least likely to report any barriers (78%). In particular, businesses in the accommodation sector were much less likely to report concerns over availability of food supplies / disruption in the supply chain (39%), compared with 63% of those in retail and 69% of those in wholesale.

Table 1.1 Threats and concerns that are barriers to the success of businesses by sector and size (all figures in %)

Threats and concerns	Total (%)	Sector: Manufacturing	Sector: Wholesale	Sector: Retail	Sector: Accommodation	Sector: Service activities	Business size <10 employers	Business size 10-24 employers	Business size 25-49 employers	England	Northern Ireland	Wales
Any	86	93*	88	86	78*	87	86	92*	81	86*	88	93*
Availability of food supplies/disruption in the supply chain	55	56	69*	63*	39*	53	53*	69*	63	54*	57	71*
Changes in consumer behaviour and demand due to Covid-19	54	46	44	46*	53	58*	54	60	42*	55	49	55
Changes in regulations and restrictions due to Covid-19	37	28	27	26*	23*	42*	36	43	32	36*	30	54*
Staff recruitment and skills	34	48*	35	29	27	36	31*	48*	45*	33*	39	46*
Competition from large businesses dominating the market	31	46*	42*	44*	21*	26*	31	31	18*	31	28	25

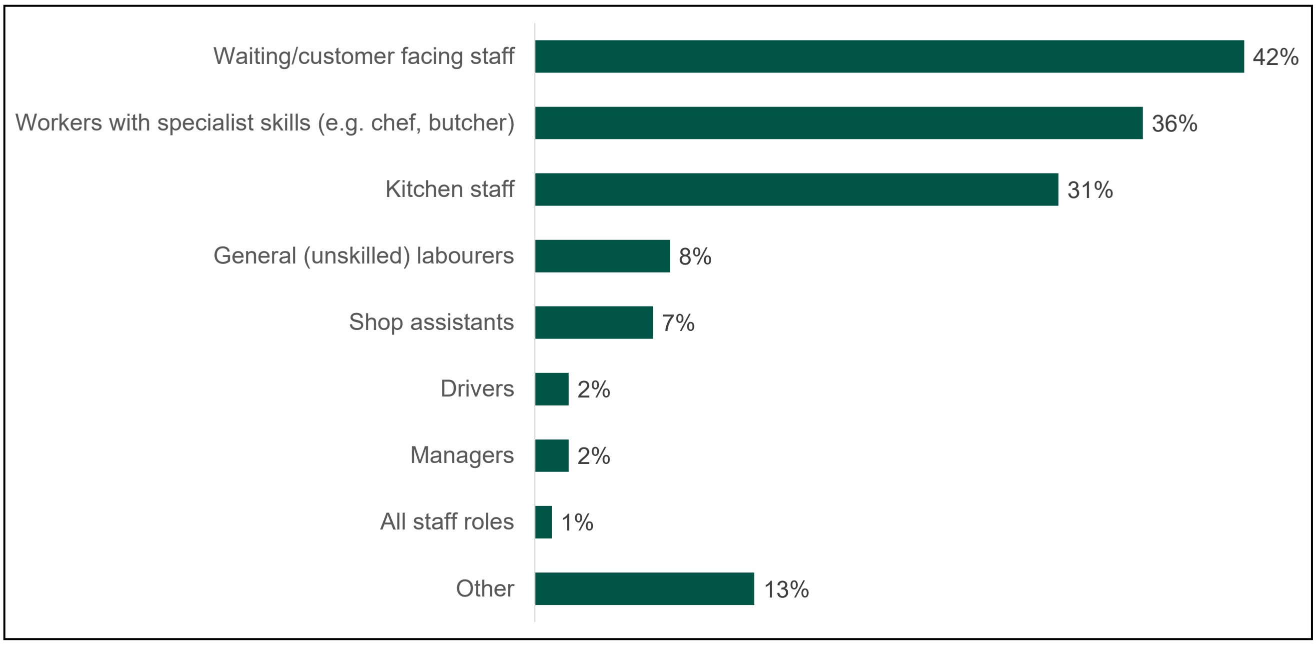
Threats and concerns	Total (%)	Sector: Manufacturing	Sector: Wholesale	Sector: Retail	Sector: Accommodation	Sector: Service activities	Business size <10 employers	Business size 10-24 employers	Business size 25-49 employers	England	Northern Ireland	Wales
Other market competition (SMEs)	24	30	26	22	16	25	24	27	14*	24	37*	13*
Meeting food standards/safety regulatory requirements	14	26*	15	14	11	14	15	12	6*	15	15	8
Obtaining or managing finance	14	20	17	16	12	13	14	16	11	14	13	13
Competition from unregulated businesses	14	21	19	17	20	12	13	19*	15	14	18	19
Lack of adequate broadband	14	19	15	13	19	14	12*	23*	10	14	12	15
None of these	13	7*	12	14	22*	13	14	8*	19	14	12	7*

The types of staff that businesses are struggling to recruit

As shown in the previous chart, around a third of businesses (34%) reported issues around staff recruitment and skills. This marked a slight increase since 2019 (28%). It was a particularly acute issue for businesses in the manufacturing sector (48%), businesses in Wales (46%), and larger businesses (48% among those with 10-24 employees; 45% among those with 25-49 employees).

Businesses citing issues with staff recruitment were then asked which types of staff they were struggling to recruit. The most common difficulty was recruiting waiting and customer facing staff (42%), followed by workers with specialist skills such as chefs and butchers (36%), as shown in Figure 4.2. As expected, the majority of the former occurred within businesses in the service activities (53%) and accommodation (47%) sectors.

Figure 1.9 Types of staff that businesses are struggling to recruit



Base: All those struggling to recruit staff (268).

5. Impact of the UK leaving the European Union

This chapter examines the impact that the UK leaving the European Union (EU) has had on businesses to date and what further impacts businesses foresee in the future. This is the first FBO tracker survey which has been carried out since the UK left the EU and the ending of the transition period on the 31st of January 2020.

Experienced and expected impact of the EU exit

All respondents were asked about the UK's exit from the EU and what impact it had on their business up to this point. Just over half (53%) reported that it had some form of impact, with a third (33%) reporting a negative impact, 18% a mixed impact and 2% a positive impact. A further 45% of businesses reported that it had had no impact.

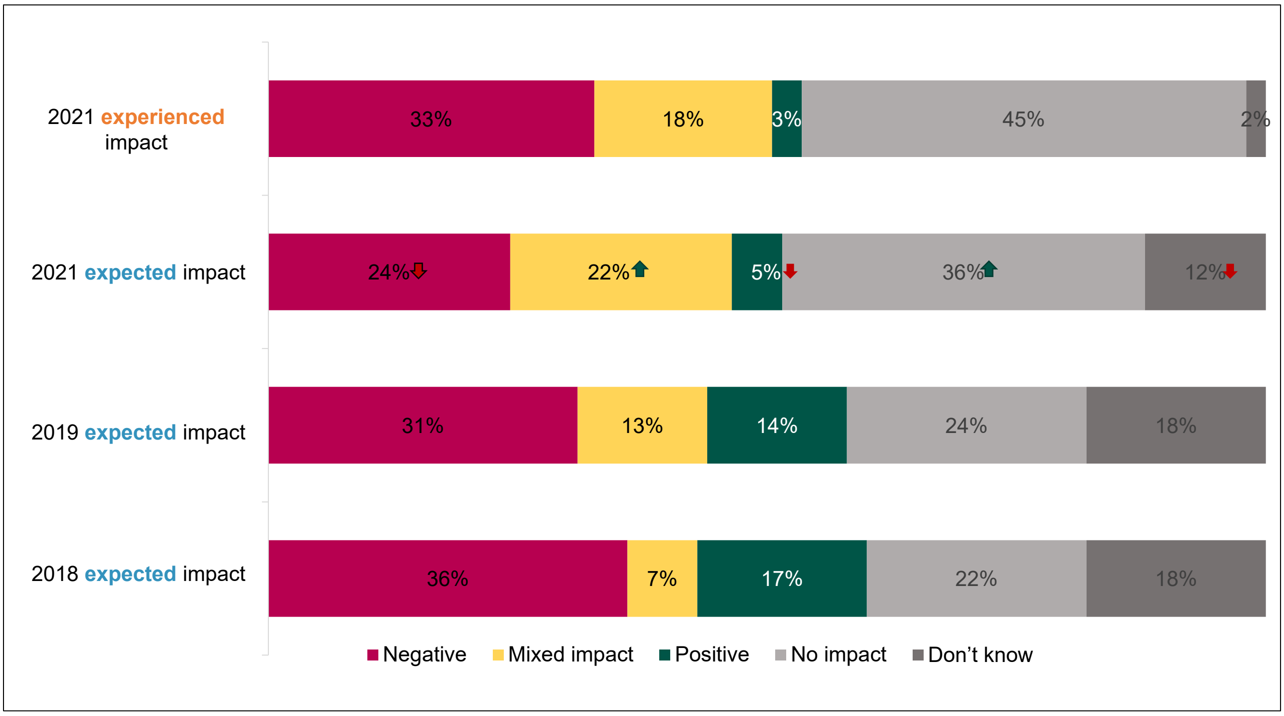
Businesses were also asked what kind of impact they expected the UK's exit to have on their business over the next few years. Just over half (52%), expected there to be further impact over the next few years, typically a negative impact (24%) or a mixed impact (22%).

In both 2018 and 2019, businesses were also asked about the expected impact of the UK's exit from the EU. As can be seen in Figure 5.1, the expectation of there being no impact has increased (36% in 2021 vs. 24% in 2019), while the expectation of mixed impact has also increased (22% in 2021 vs. 13% in 2019). The expectation of a solely positive or negative impact has decreased (positive: 6% in 2021 vs. 14% in 2019; negative: 24% in 2021 vs. 31% in 2019).

It is especially interesting to contrast the experienced impact of the 2021 survey responses to the 2019 expected impact. Whilst the expectation of a negative impact in 2019 was almost a third (31%), which is in line with what was experienced in 2021 (33%), the expectation of positive impact in 2019 was at 14%, which is much higher than the experienced positive impact of just 3%. Additionally, nearly half (45%)

reported they had experienced no impact in 2021, as opposed to just under a quarter (24%) expecting no impact in 2019.

Figure 1.10 Perceptions on the impact of leaving the EU on businesses in 2021 compared with expected impact



Base: All businesses; 2021 (700); 2019 (644); 2018 (530). Arrows indicate significant difference from 2019. Please note that in 2021 question asked for expected impact "over coming years" whereas in 2018 and 2019 question asked for expected impact "over next couple of years".

Experienced impact of the EU exit

The impact of the UK's exit from the EU varied by business type:

- Wholesalers were the most likely to have experienced some impact on their business because of the UK's exit from the EU (80%), whereas those in the accommodation sector were the least likely to experience any kind of impact on their business (49%).
- Sole traders were the most likely to report that the UK's exit from the EU had no impact on their business (63% vs. 34% of those with 25-49 employers).

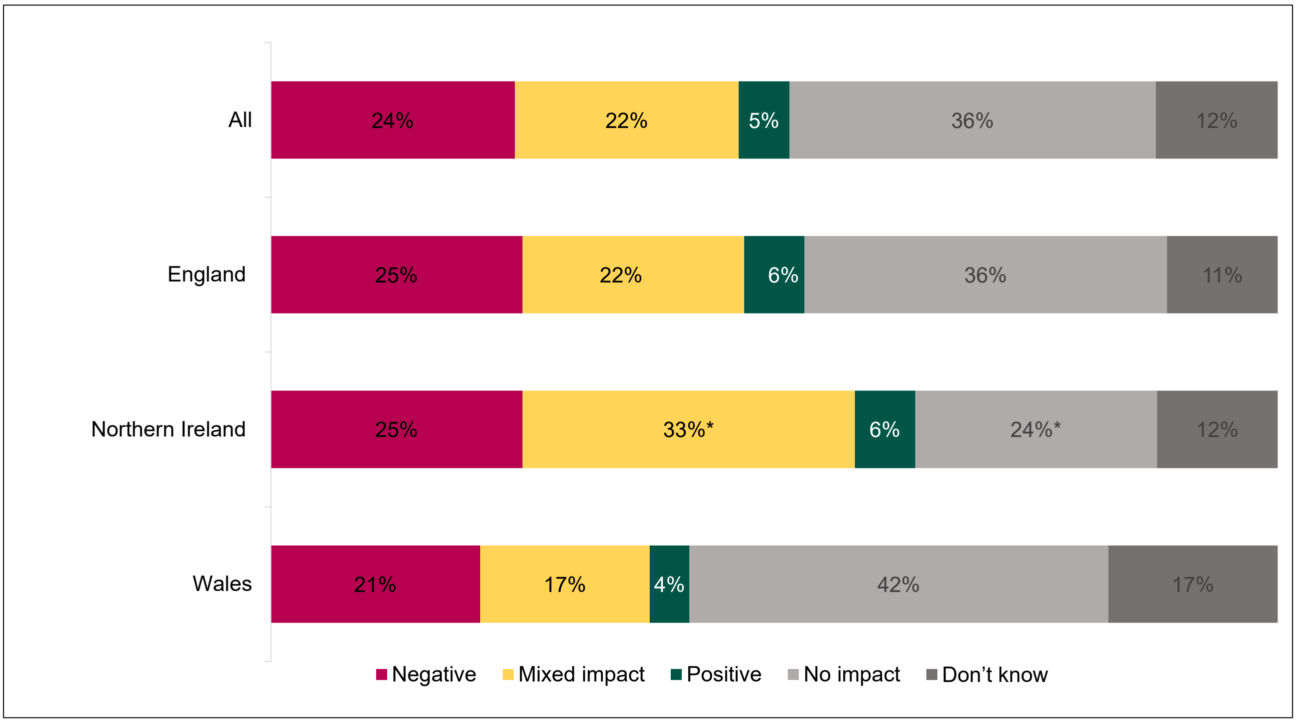
- By country, the experienced impact also varied, with two-thirds of businesses in Northern Ireland (65%) stating they have experienced impact compared to just over half in England (53%) and Wales (53%).

Expected impact of the EU exit

The expected impact of the UK's exit from the EU varied by business type. Manufacturers and wholesalers were the most likely to expect some impact on their business (71% and 81% respectively), when compared to the overall average (51%).

Expected impact over the next few years also varied by country. Over a third of businesses in England (36%) and 42% of businesses in Wales expected there to be no impact within the next few years, whereas only 24% of businesses in Northern Ireland expected there to be no impact. Similarly, the expectation of mixed impact was much higher in Northern Ireland (33%) as opposed to England and Wales (22% and 17% respectively).

Figure 1.11 Expected impact of the EU exit in the next few years by country



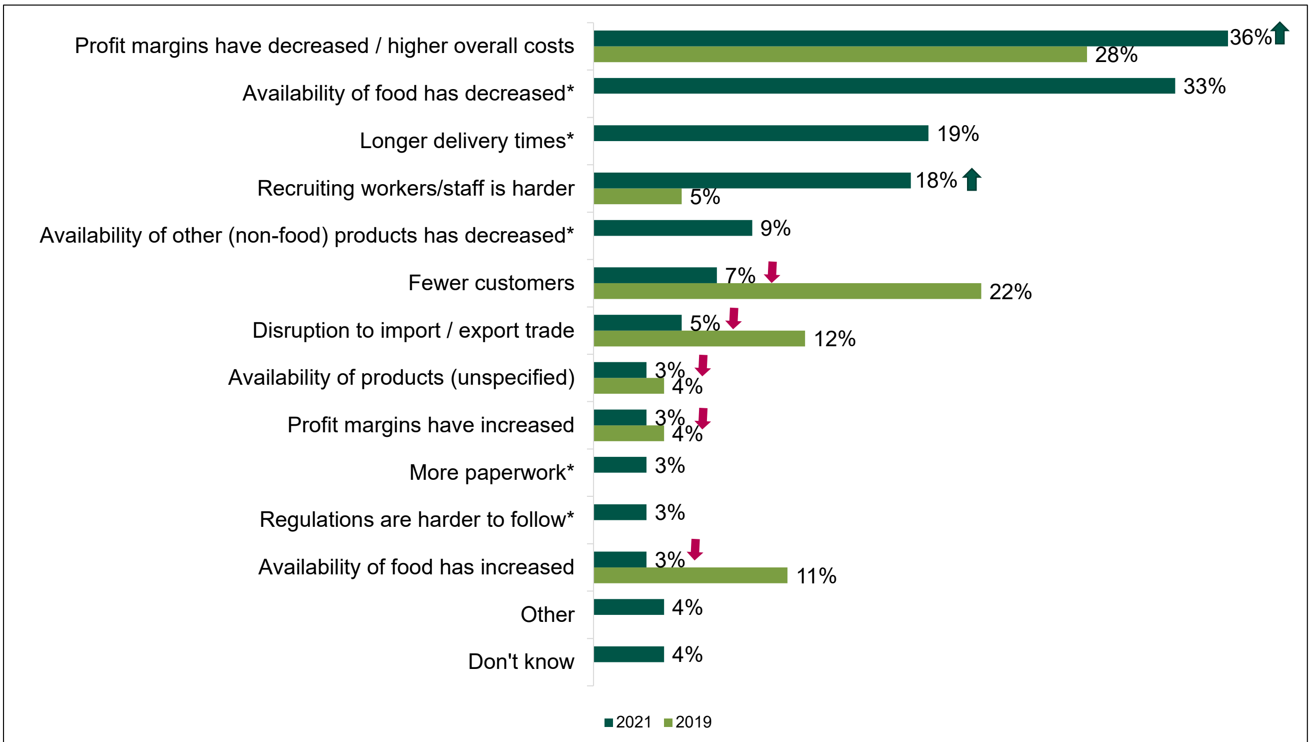
Base: All businesses (700), England (505), Northern Ireland (85), Wales (110).

Ways in which the EU exit has impacted business

All businesses that reported that the UK's exit had some impact were asked about the main way their business had been affected. Just over a third (36%) reported that profit margins have decreased or that they have experienced higher overall costs, followed by 33% saying the availability of food has decreased. Longer delivery times (19%) and difficulties recruiting staff (18%) were also common experiences.

It is again interesting to contrast these experienced impacts in 2021 with the expected impacts in 2019. In 2019, businesses who expected impacts from the EU exit were asked to identify the expected main impact of the EU exit on their business. The main concern in 2019 was the increased price of raw materials/ingredients (28%) which was also the most commonly experienced impact in 2021. However, in 2019, the second most commonly anticipated concern was a lack of customers, including tourists/ people spending less (22%). In 2021, this was replaced by concerns about availability of food and delivery times.

Figure 1.12 Experiences of the impact of the EU Exit on businesses in 2021 vs. expected impact in 2019



Base: Those for whom EU exit has had an impact 2021 (415); All businesses that expected a negative or positive impact 2019 (367), Arrows indicate significant difference from expectation in 2019. Asterisks indicate new code for 2021.

In terms of the type of impact, there was significant variation by business type. Businesses in the accommodation sector also found that they had fewer customers as a result (33%) whereas this was much less of a concern for those in retail (3%) and service activities (7%). The next biggest impact for businesses in the accommodation sector was recruiting workers or staff (29%), whereas this was only a concern for 4% of retail businesses and 8% of wholesalers.

There were also differences in impact by country. In Wales, the biggest impact was that the availability of food had decreased (57%), compared to England (31%) and Northern Ireland (37%). Only 17% of businesses in England experienced longer delivery times, whereas this was much higher in Wales (35%) and Northern Ireland (34%). Businesses in England were also more likely to report that recruitment of staff was harder (19%), which was less commonly reported in Wales (8%) and Northern Ireland (5%).

6. How food safety information is provided to customers

This chapter examines awareness of Natasha's Law, the ways in which businesses provide allergen information to their customers, and what steps they have taken to help customers make more healthier decisions.

Awareness of Natasha's law

Natasha's Law is the Food Information to Consumers (FIC) Regulation amendment which made it compulsory to provide full ingredients labelling for Pre-packaged for Direct Sale (PPDS) foods, as of October 1st, 2021. All businesses who sell pre-packaged food (the vast majority of whom are retail businesses) were asked whether they were aware of Natasha's Law. Four in every five businesses (79%) stated that they were aware of this law, rising to 94% among larger businesses with 25-49 employees. Those in Northern Ireland were less likely to know about Natasha's Law (61%) compared to those in England (80%) and Wales (81%).

Whether allergen information is provided by businesses

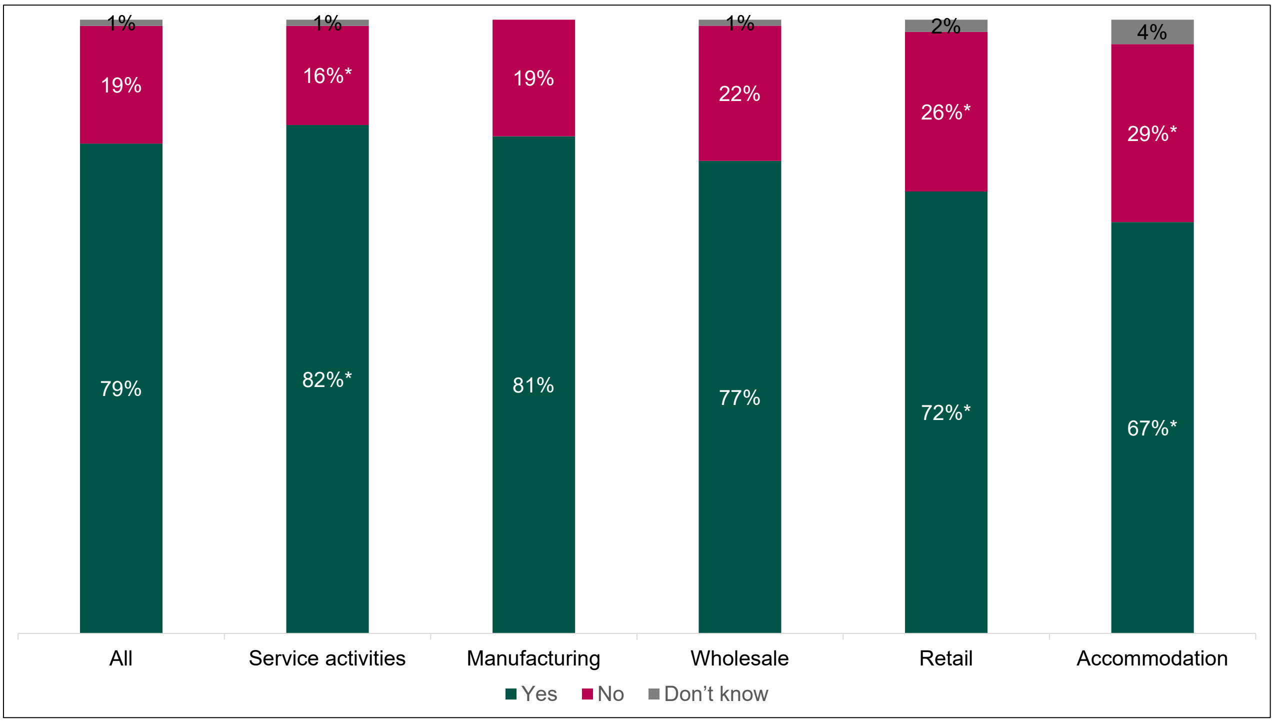
All businesses were asked whether they provide information on allergens contained in the food or drink that they sell. Nine in every ten businesses (91%) said they do, while only 9% said they did not and 1% did not know. This represents a considerable increase of 22 percentage points since 2019 (69%).

In 2019, a similar question on allergen information was asked to businesses who sold packaged food or served food on-site and 91% said they provide information on potential allergens. Businesses in 2021 were also asked if they provided information on allergens that might be present in products due to cross contamination, such as through storage or preparation. Four in every five (79%) businesses said that they did.

Businesses in service activities were the most likely to provide this information (82%), closely followed by those in manufacturing (81%). Those in the accommodation sector were the least likely to provide this information with only 67%

doing so. Businesses in Wales were the most likely to provide information on cross contamination (91%), compared to those in England (78%) and Northern Ireland (77%).

Figure 1.13 Proportion of businesses that provide information on allergens which might be present in products they sell due to cross contamination

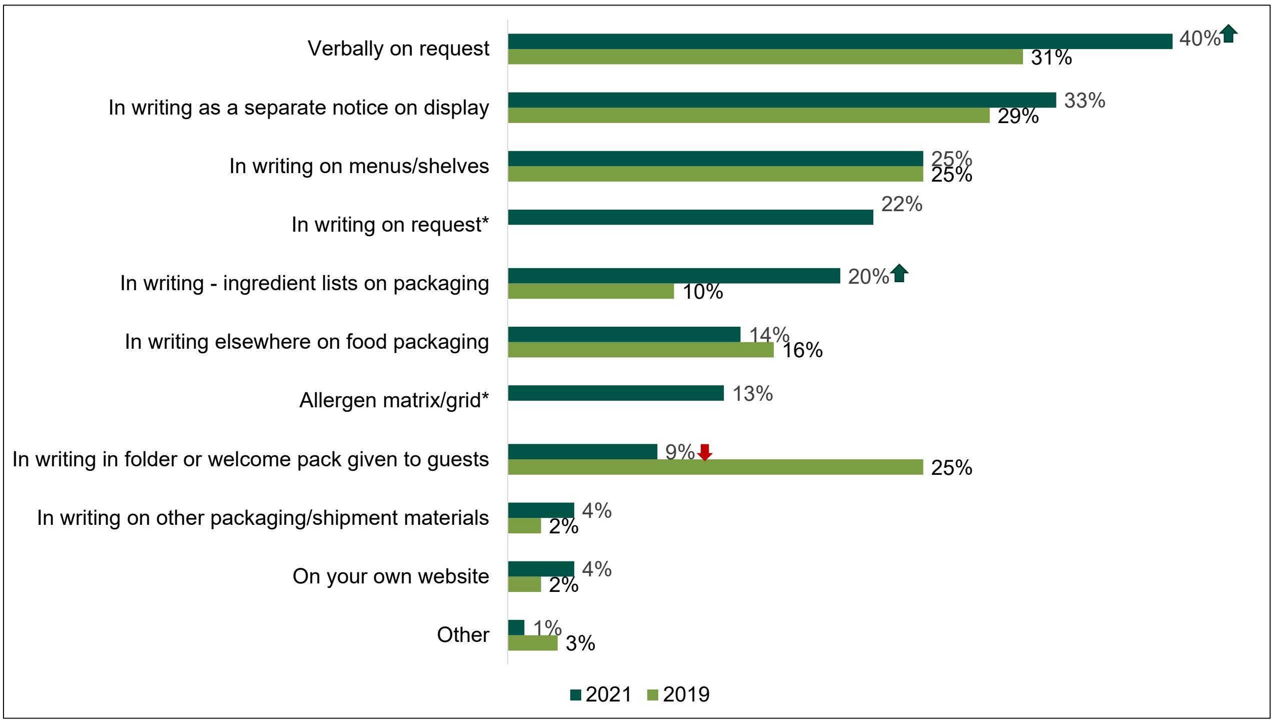


Base: All businesses (700); Service activities (256), Manufacturing (114), Wholesale (82), Retail (138), Accommodation (110). *Indicated significant difference from all.

Allergen information format

Businesses that did provide allergen information were then asked how they provided this information to customers and clients. The most common way to provide this information was verbally on request (40%), followed by in writing as a separate notice on display (33%) and in writing on menus and shelves (25%). These were also the most common ways to provide information in 2019, as shown in Figure 6.2, although the proportion citing that they provide the information verbally on request has increased considerably (from 31% in 2019 to 40% in 2021). The proportion providing allergen information within ingredient lists on packaging has also doubled, from 10% in 2019 to 20% in 2021. It is interesting to note that 15% of businesses only provided allergen information upon request (either written or verbally), thus suggesting that the customer will need to be proactive in these situations to seek out information.

Figure 1.14 Format allergen information is provided to customers or clients



Base: All businesses who provide allergen information: 2021 (638); 2019 (482). Arrows indicate significant difference from 2019. Arrows indicate significant difference from 2019. Asterisks indicate new code for 2021. Note - wording varies between 2021 and 2019

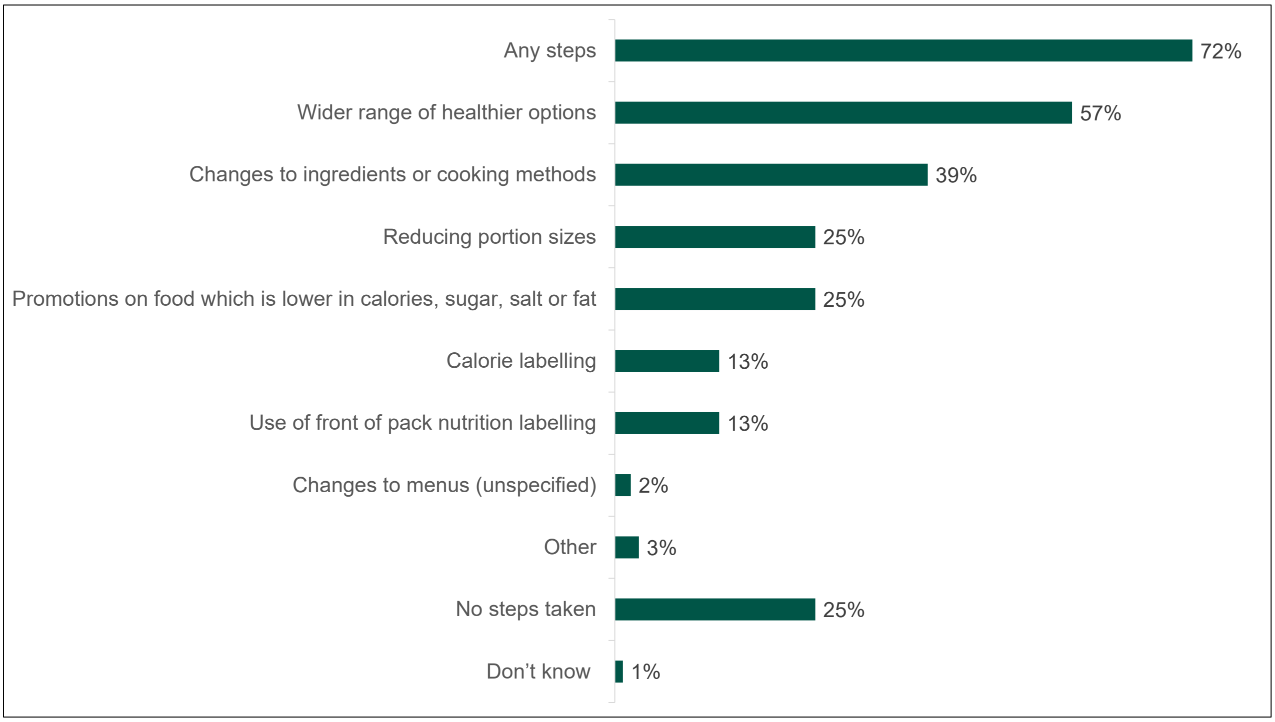
The type of allergen information provided varied by business type. Businesses within the accommodation sector were the most likely to provide information verbally on request (50%) followed by those in service activities (44%). Wholesalers were the least likely to provide allergen information verbally (14%) and were the most likely to provide information on allergens in writing elsewhere on food packaging (48%).

By business size, smaller businesses (<10 employees) were more likely to provide information in writing as a separate notice on display (35%) than businesses with 10-24 employees (24%). Additionally, businesses with 25-49 employees were more likely to supply allergen information on their website (23%) when compared to the overall average (4%).

Encouraging customers to make healthier choices

All businesses except wholesalers were asked what steps they had taken to help customers make healthier choices. Seven in ten businesses (72%) said they had made at least one change to help customers. The most reported change was a wide range of healthier options (57%) followed by changes to ingredients or cooking methods (39%).

Figure 1.15 Steps taken to help customers make healthier choices



Base: All businesses excluding wholesalers (620).

Businesses within the accommodation sector were the most likely to have taken at least one of these steps (82%), while those in manufacturing were the least likely to (63%). Accommodation and service activities businesses were much more likely to provide a wider range of healthier options (68% and 62% respectively vs. 57% overall) and were more likely to change to healthier ingredients in cooking (59% and 43% respectively vs. 39% overall). Service activities businesses were more likely to be reducing portion sizes than other groups (30% vs. 25% overall).

Smaller businesses (<10 employees) were more likely to have taken no steps (26%) compared to businesses with 10-24 employees (19%) and businesses with 25-49 employees (16%).

Over half (53%) of businesses in Northern Ireland had made changes to ingredients or cooking methods, compared to 40% of those in England and 26% of those in Wales. Welsh businesses were also less likely to offer promotions on foods lower in calories, sugar, salt or fat (14%) than businesses in England (25%) and Northern Ireland (33%).

7. Information and guidance

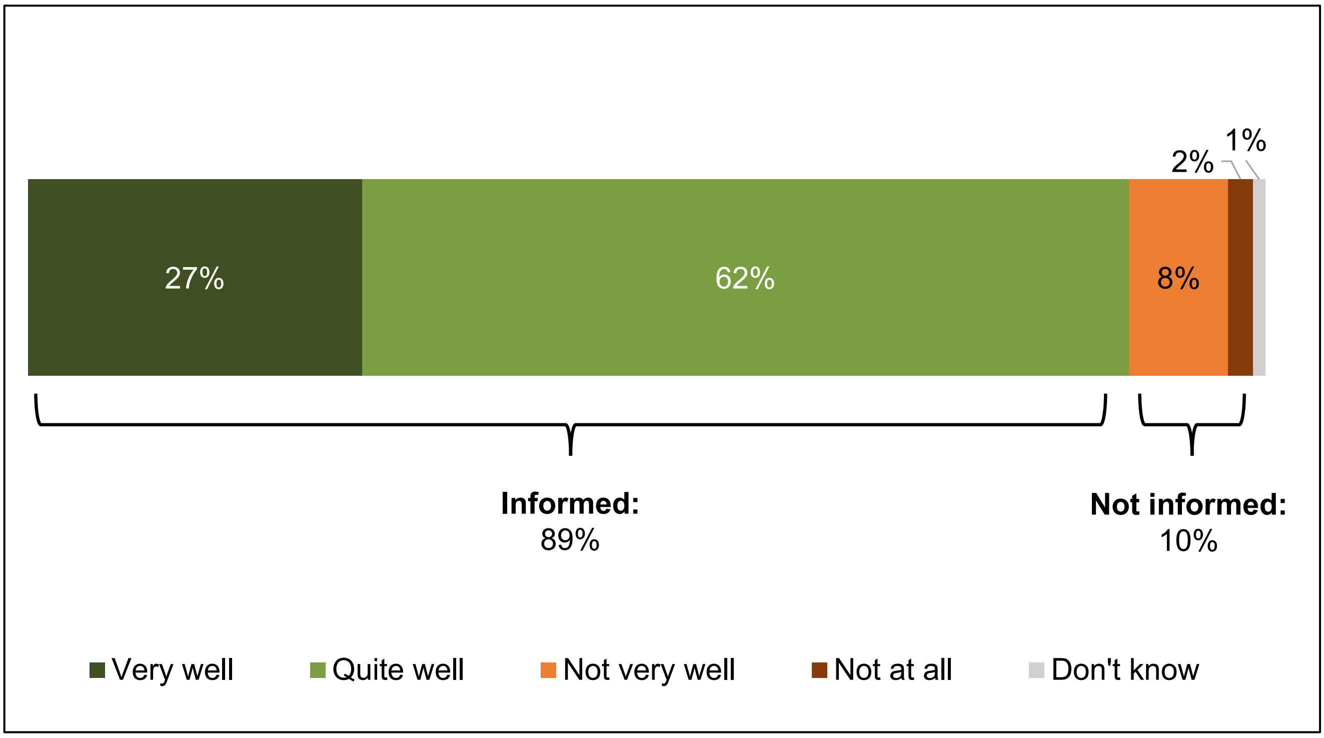
This section investigates how informed businesses feel about all regulations affecting them, the most commonly used sources of information on food safety guidelines and regulations and the preferred language for receiving food safety communications. It also investigates the proportion of businesses providing food safety training to staff and how this information is delivered.

How informed businesses feel about regulations affecting their business

All respondents surveyed were asked how well informed they feel about regulations that affect their food and drink business overall. It is important to note that all survey respondents identified themselves as the person in the business primarily responsible for food safety and therefore they are likely to be typically more informed about regulations than other staff members.

Around 9 in 10 (89%) of respondents felt either very or quite well informed about regulations affecting their business, in line with findings from 2019 (90%). However, in 2021 there was a drop in the proportion who reported feeling very well informed (27% vs. 42% in 2019). Respondents were not asked a follow-up question about why they did not feel fully informed, however it is important to note, as previously discussed, that this is the first FBO Tracker survey since the COVID-19 pandemic and the UK leaving the EU, both of which saw new regulations to UK food businesses.

Figure 1.16 How informed businesses feel about regulations affecting them



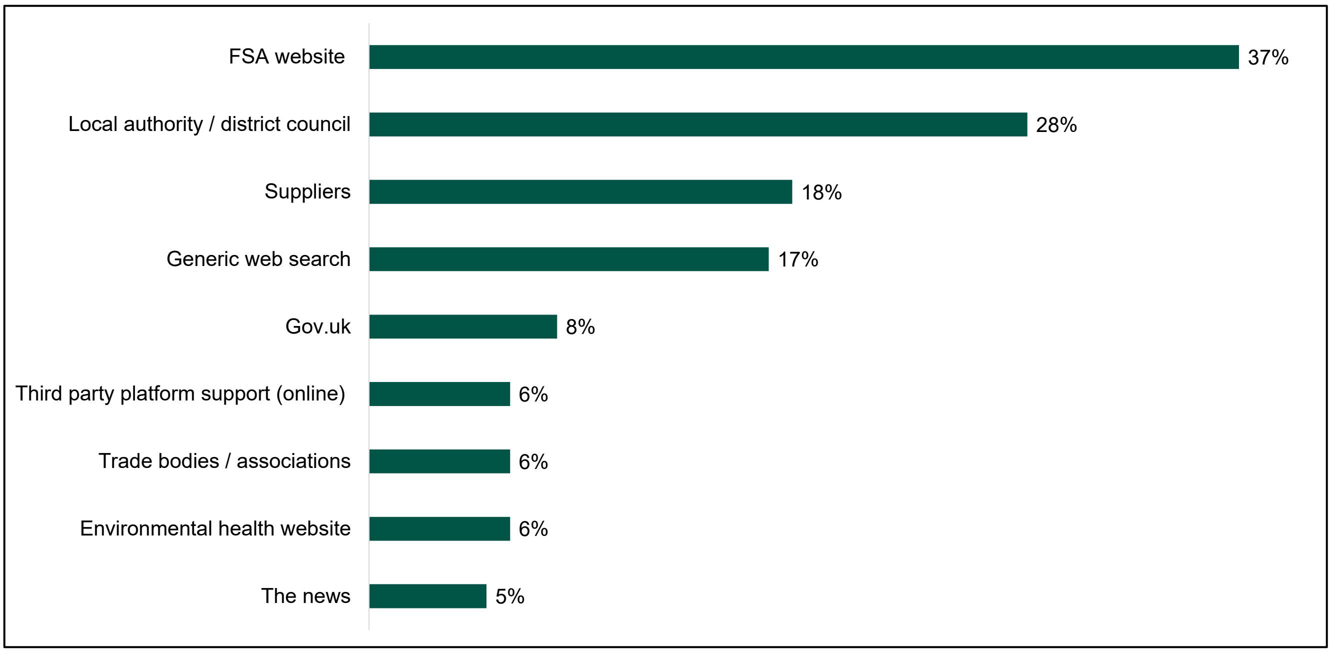
Base: All businesses (700).

Very little variation could be seen by business type. There was also no clear pattern by size, although the largest businesses in the sample (those with 25-49 employees) were the most likely to feel informed (97% vs. 89% overall). Those in Northern Ireland were more likely than other countries to feel *very* informed (41%); however there was no significant difference by country in the proportions feeling informed at all (89% in England, 93% in Northern Ireland and 90% in Wales). A pattern could be seen by FHRS rating; those with a 0-2 rating were the least likely to feel informed (78% vs. 91% of those with a rating of 5).

Sources of information about food safety

Businesses were asked where they get information about food safety guidelines and regulations, food allergies and product recalls. Almost all (99%) cited at least one source, most commonly the FSA website (37%) or the local authority/district council (28%). Responses cannot be compared to 2019 results as previously businesses were provided with a list of information sources.

Figure 1.17 Sources of information about food safety guidelines and regulations (unprompted)



Base: All businesses (700). Responses less than 5% not charted.

Sources of information about food safety guidelines and regulations varied by business type. Those in service activities were more likely than average to use the FSA website (42%). By contrast, retailers were the least likely to use the FSA website but were much more likely to get information from their suppliers (32% vs. 18% overall). Those in the accommodation sector were most likely to get information from their local authority or district council (37% vs. 28% overall). Those further up the supply chain – manufacturers and wholesalers - were more likely to use trade bodies and associations (15% and 20% respectively vs. 6% overall).

Variation was also seen by country, particularly in the use of local authorities and district councils as a source of information. These were cited by almost half (49%) of businesses in Northern Ireland, 43% of businesses in Wales, but only 26% of businesses in England. Businesses in Northern Ireland were less likely than those in England or Wales to use the FSA website (26% vs. 38% and 39%[1] respectively).

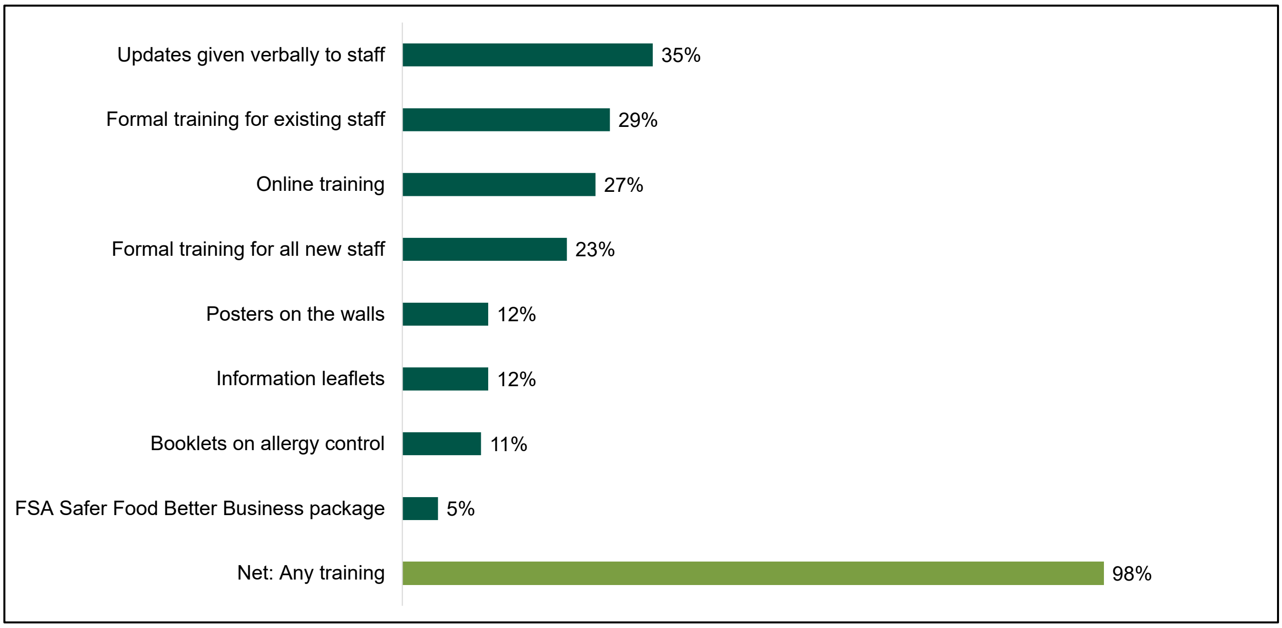
[1] Due to small base size, difference for Wales is not statistically significant. Findings should be treated as indicative only.

Use of the FSA website also varied by size, with more than half (53%) of businesses with 25-49 employees using the website, compared to 35% of sole traders, suggesting scope to raise awareness and engagement with the website for smaller businesses. Those with a higher FHRS rating were also more likely to use the FSA website (40% of those with FHRS rating 5 vs. 21% FHRS rating 0-2) suggesting it is a valuable source of information for maintaining standards.

How staff are provided with information and training

Businesses were asked how staff and managers were provided with information and training on food safety guidelines and regulations, including food allergies. As shown in Figure 7.3, nearly all (98%) businesses provided some form of training, most commonly this was provided through verbal updates to staff (35%). Less than a quarter (23%) of businesses provided formal training for all new staff, which is potentially a key time and opportunity to ensure that all staff are trained. Combining two responses, approaching two-fifths (38%) of businesses reported that they provide any formal training, either for existing staff or for new staff.

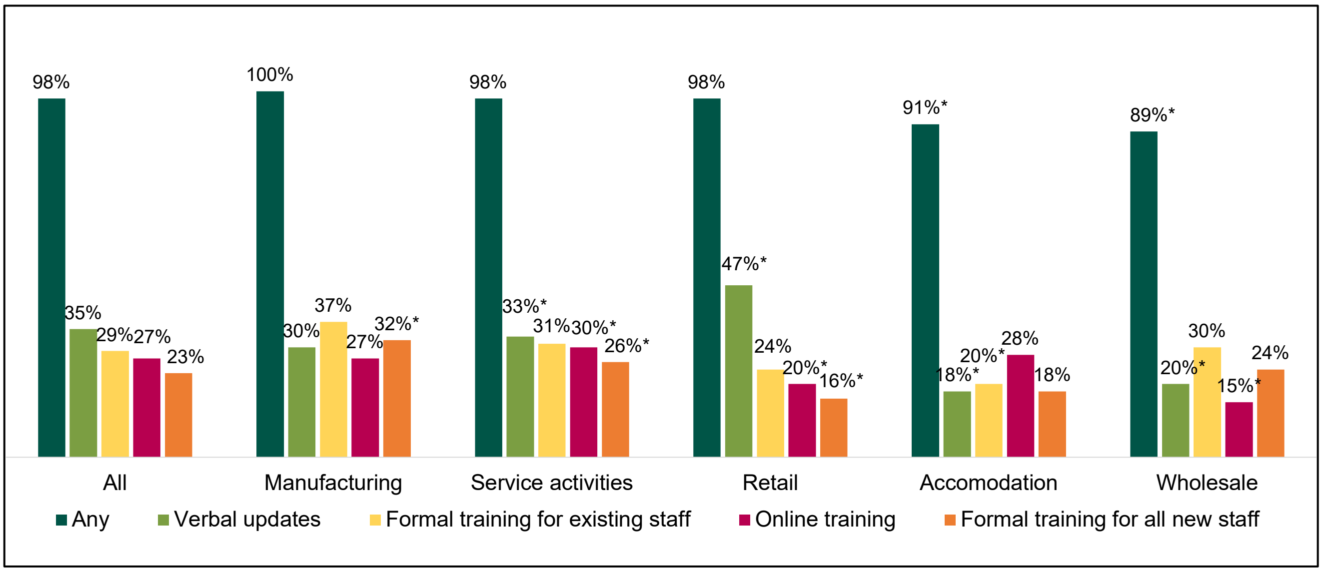
Figure 1.18 How staff and managers are provided with food safety information (unprompted)



Base: All businesses (700). Responses less than 5% not charted.

As shown in Figure 7.4 below, a large amount of variation could be seen by sector, with accommodation and wholesale businesses less likely than average to provide staff and managers with any information or training on food safety guidelines and regulations (89% and 91% respectively vs. 98% overall). Retail businesses were much more likely than average to provide updates verbally to staff (47% vs. 35% overall). Those in the manufacturing and service activities sector were more likely to provide formal training to existing staff or to all new staff (56% and 41% respectively, compared to 38% overall) and those in the accommodation sector were the least likely to provide this formal training (28%).

Figure 1.19 How staff and managers are provided with food safety information, by sector



Base: All businesses (700). Only top 4 responses overall are charted.

Some variation could also be seen by country, with businesses in Wales slightly less likely than average to provide staff with any information on food safety (94% vs. 98% overall). Perhaps unsurprisingly, a pattern could also be seen by FHRS rating. Those with an FHRS rating of 0-2 or 3 were less likely than average to report providing any training (94%[2] and 93% respectively vs. 99% FHRS rating 5). Respondents who felt informed about regulations affecting their business were more

[2] Due to small base size difference for FHRS rating 0-2 group is not statistically significant and should be treated as indicative only.

likely to report their business offered information and training, compared to those who did not feel informed (99% vs. 90%).

Preferred language for communications

Businesses were asked which language was primarily spoken by management and employees. The vast majority (92%) of businesses surveyed reported that English was the primary language for all managers and employees. Only 6% had any employees speaking other languages and 3% had any managers speaking other languages, however this was slightly more common in the wholesale sector (where 9% businesses had managers speaking other languages).

The most common languages spoken, other than English, were Turkish, Urdu, Welsh, Italian and Bengali (each spoken by employees in 1% of businesses). Amongst businesses with employees speaking other languages, a small proportion (3%) indicated they would prefer to receive information both English and also another language (most commonly Amharic or Welsh). Businesses with managers speaking a language other than English were more likely to prefer to receive their information in other languages (9%).

It is noteworthy that all (100%) businesses surveyed who had any staff speaking a primary language other than English rated communications they had received in the last 12 months relating to food safety events as fairly or very clear.[3] Three-quarters (75%) rated this communication as very clear, in line with those who speak English as a primary language (also 75%). Clarity of communications related to food safety events is discussed further in Chapter 10.

[3] Please note a small base size (n=40)

8. Experiences and perceptions of the FSA

This chapter covers awareness and knowledge of the FSA, as well as experience of and confidence in the FSA amongst small and micro food businesses.

Awareness and knowledge of the FSA

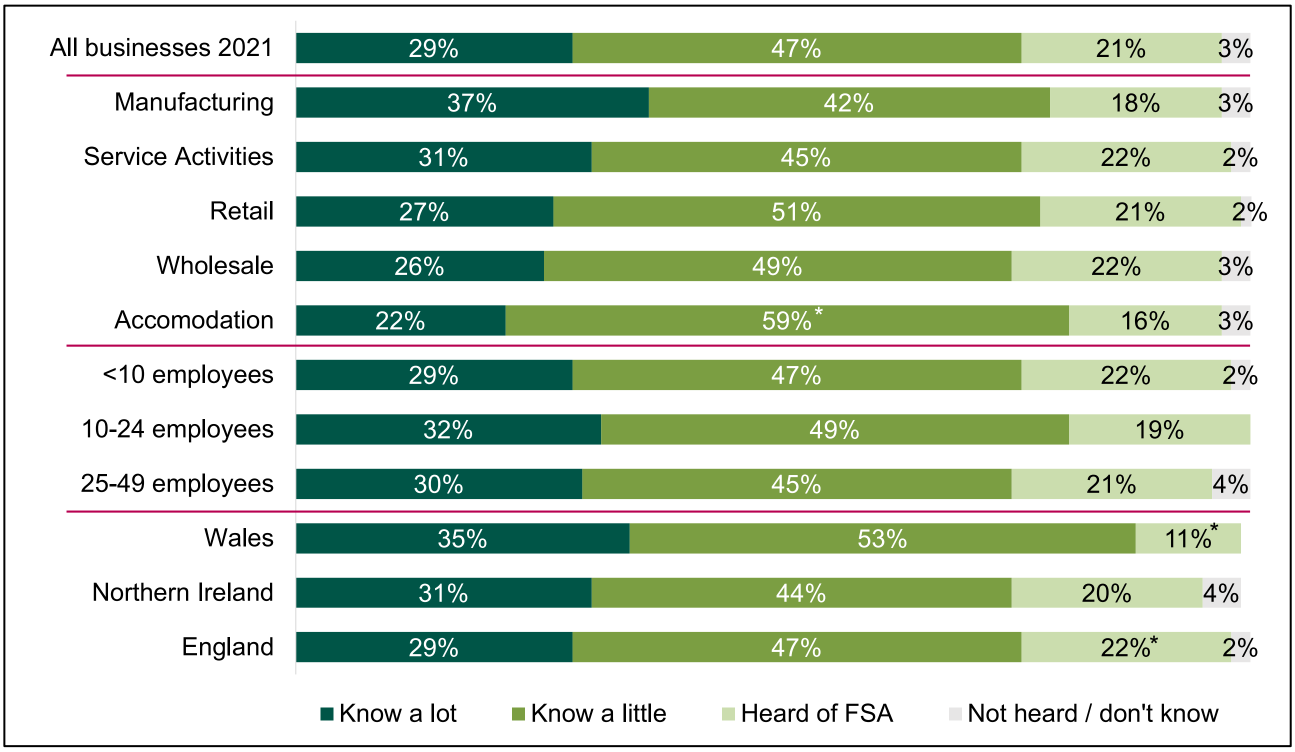
Practically all small and micro food businesses (98%) had heard of the FSA, with only 2% reporting they had not heard of the organisation. This is at a similarly high level as 2019 (97%), and slightly higher than the level of awareness recorded in 2018 (94%).

Businesses who had never heard of the FSA were more likely to be sole traders (6%) and more likely to have staff speaking a primary language other than English (7%).

Although practically all businesses were aware of the FSA, many did not know too much about the organisation, with two-thirds (68%) saying they only knew a little about the FSA or had only heard the name.

Around 3 in 10 (29%) businesses felt that they knew 'a lot' about the FSA, with businesses in the manufacturing sector and those with a FHRS rating claiming to have the greatest knowledge; 37% and 32% respectively said that they knew 'a lot' about the FSA. This compares to just 22% of businesses in the accommodation sector and just 19% with no FHRS rating.

Figure 1.20 Awareness and knowledge of the FSA



Base: All businesses (700); Manufacturing (114), Service Activities (256), Retail (138), Wholesale (82), Accommodation (110), <10 employees (436), 10-24 employees (179), 25-49 employees (85); Wales (110), Northern Ireland (85), England (505).

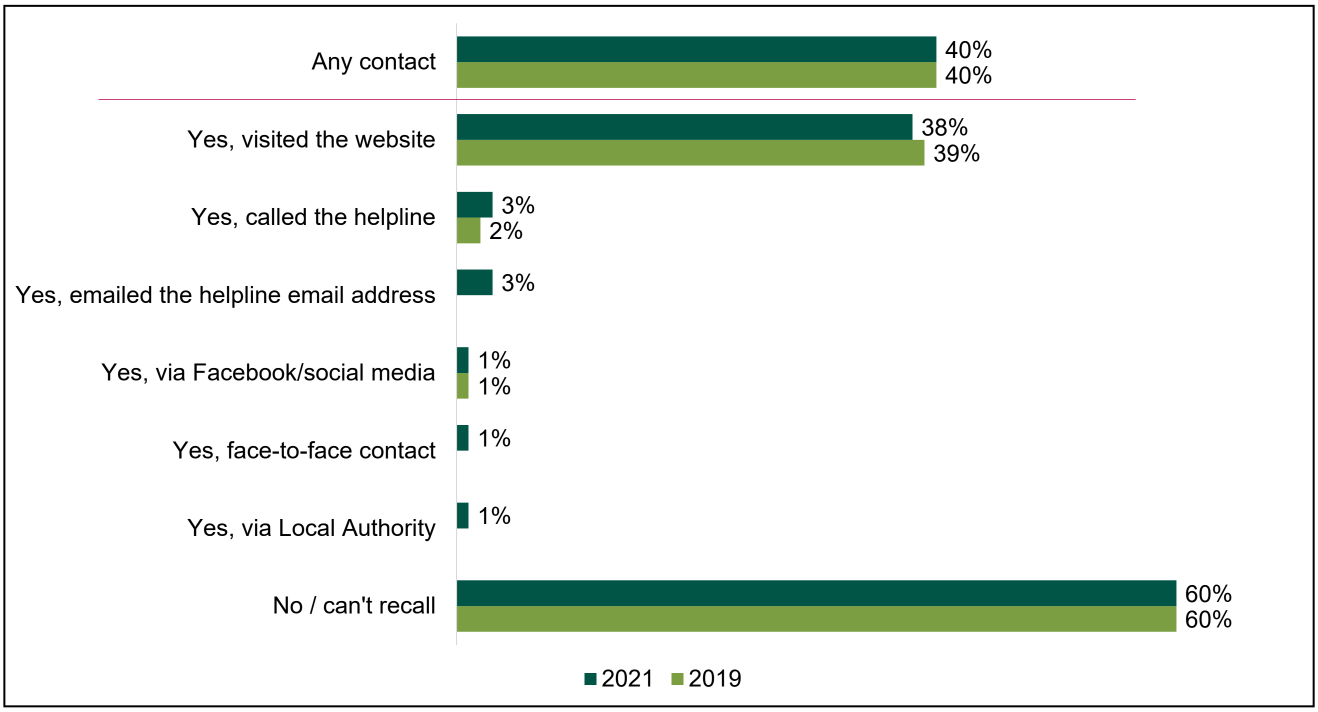
Contact with the FSA

Those who had heard of the FSA were asked whether they had had any interactions or contact with the FSA in the last 12 months, and the channel that they had used.

Overall two-fifths (40%) of small and micro food businesses interviewed had had some contact. Nearly all of this interaction had been through the website (38%) - very few businesses had used the other channels available or actively spoken to the FSA.

The proportion of businesses having contact with the FSA and the manner of the contact was the same as that found in 2019, where 40% of businesses had had some contact in the last 12 months, again mostly via the website. This was also the case in 2018.

Figure 1.21 Proportion of businesses who had visited FSA's website, contacted the helpline or been in touch via social media in last 12 months



Base: All businesses who have heard of the FSA (688); All businesses who have heard of the FSA 2019 (624).

Businesses in the manufacturing and wholesale sectors had had the most interaction with the FSA over the previous 12 months, with 47% and 48%, respectively, of businesses in these sectors having had some contact. This was almost twice the proportion of businesses in the accommodation sector (25%), the sector that had had the least amount of interaction.

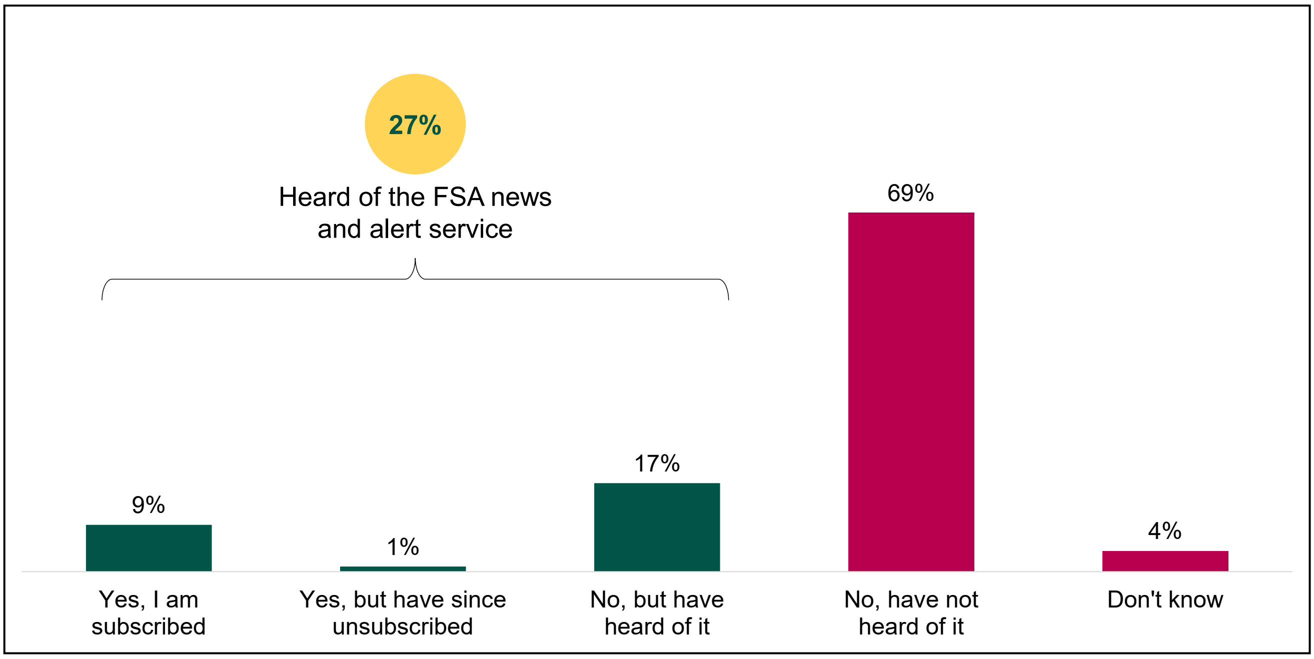
Other business groups who had less interaction with the FSA were sole traders (29%, in comparison to 47% of businesses with 25-49 employees) and businesses based in Northern Ireland (22%). Businesses with a FHRS rating of 0-2 also look less likely to have any contact, with only 28% having had any interaction.

FSA news and alert service

All businesses, regardless of whether they had heard of the FSA or not, were asked if they had ever subscribed to the FSA news and alert service. As shown in Figure 8.3, just over a quarter (27%) of businesses had heard of the news and alert service, while around one in ten businesses were subscribed to the service (9%). Few had actively unsubscribed from the service (just 1%).

Awareness and usage of the news and alert service by businesses was broadly the same as 2019 and 2018, although a direct comparison cannot be made as the question wording was updated in 2021. Of businesses that had heard of the FSA in the 2019 Tracker survey, 29% had heard of the news and alert service and 13% subscribed to the service.

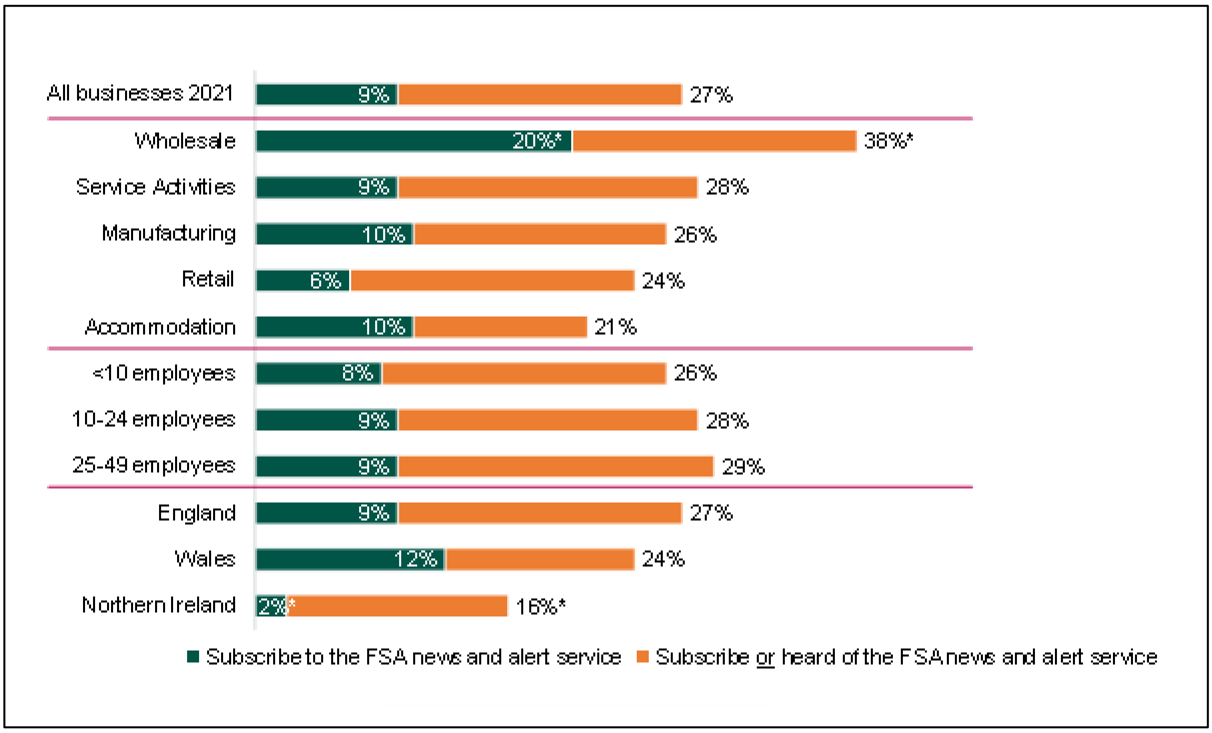
Figure 1.22 Awareness of the FSA news and alert service



Base: All businesses (700).

As found in 2019, businesses in the wholesale sector were more likely than others to subscribe to the news and alerts service (20%). Otherwise, by size of business there were no differences in the awareness and usage of the FSA news and alerts service, although usage was markedly lower for businesses in Northern Ireland.

Figure 1.23 Awareness of, and subscription to, the FSA news and alert service by sector, size and country



Base: All businesses (700); Wholesale (82), Service Activities (256), Manufacturing (114), Retail (138), Accommodation (110), <10 employees (436), 10-24 employees (179), 25-49 employees (85), England (505), Wales (110), Northern Ireland (85).

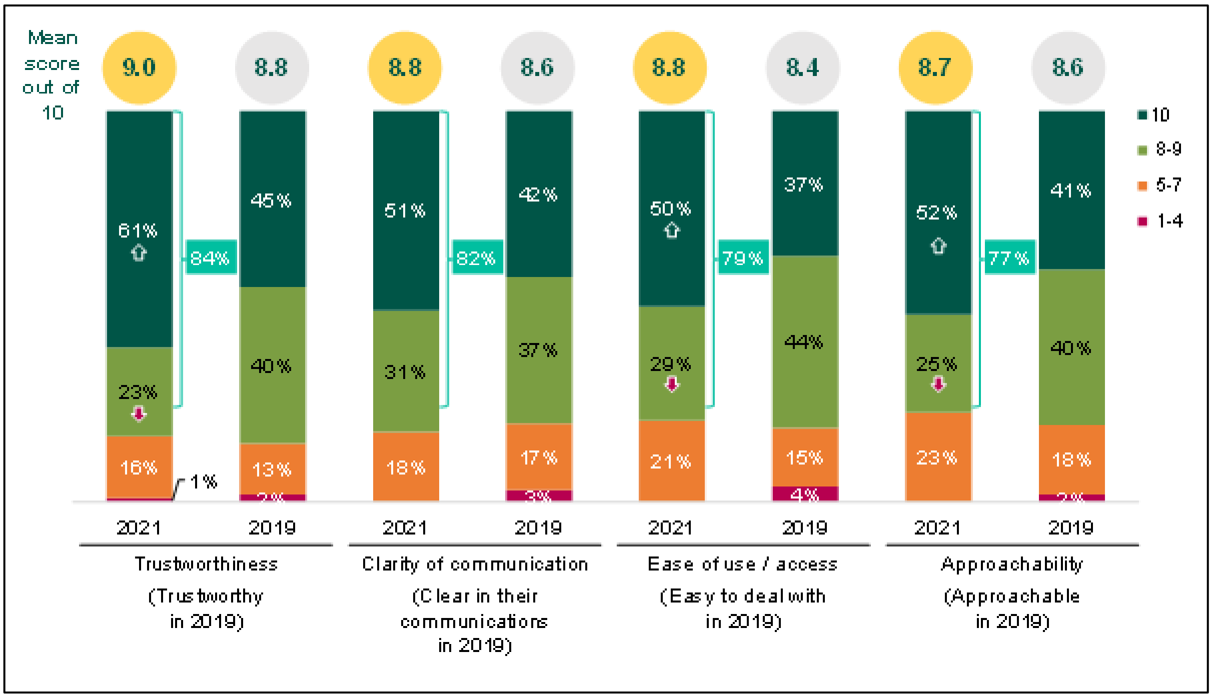
Ratings of contact with the FSA

The 40% of businesses who had had contact with the FSA or had visited the FSA website were asked to rate the FSA on four attributes: trustworthiness, clarity of communication, ease of use / access and approachability. Answers were given on a 10-point scale, where 1 was 'very poor' and 10 was 'excellent'.

Those who had had some interaction or contact with the FSA over the last 12 months were very positive about the experience, with at least a half giving the top box rating of 10 out of 10 for each of the service measures. Ratings were high across all four measures although they fell just a little for ease of use / access and approachability; 79% and 77% respectively gave a score of 8+ for these attributes, against 84% for trustworthiness and 82% for clarity of communications.

It is not possible to directly compare 2021 experiences with those held in 2019 due to slight changes in the phrasing of the four attributes. That said, Figure 8.5 below suggests that there has been an improvement in perceptions of the FSA over the past few years.

Figure 1.24 Ratings of the FSA (based on experience)



Base: All businesses who had had contact the FSA in the last 12 months (269); All businesses in 2019 who had had contact the FSA in the last 12 months (286).

The sub-sample base sizes by sector and size of company were too low to draw any meaningful conclusions around experiences with the FSA, but broadly the perceptions of the FSA looked to be similar across different types of businesses.

Confidence in the FSA

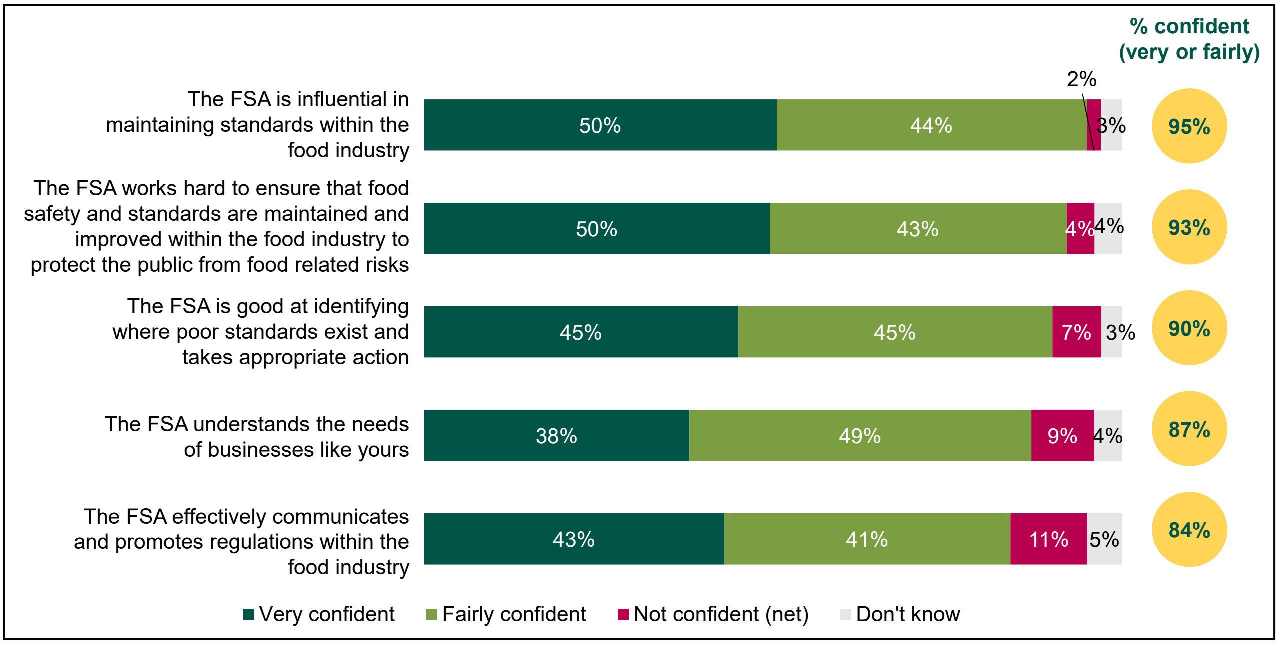
Confidence in the FSA achieving their aims

Businesses were presented with a list of the FSA's aims and asked to state, using a 4-point scale, how confident they felt that the FSA is achieving these aims (very confident, fairly confident, not very confident and not confident at all).

Businesses generally felt confident that the FSA was achieving its objectives, with at least 9 in every 10 businesses confident that the FSA is influential in maintaining standards (95%), works hard to ensure that food standards are maintained / improved (93%), and is good at identifying where poor standards exists and takes appropriate action (90%).

Although confidence levels were strong for all areas shown in Figure 8.6, they did fall slightly in respect of the FSA's understanding of the needs of businesses (87%) and the FSA effectively communicating and promoting regulations (84%). For both these objectives, around 1 in every 10 businesses said there were not confident in the FSA, with most opting for the softer category of 'not very confident', rather than saying they were 'not confident at all'.

Figure 1.25 Confidence in the FSA achieving their aims



Base: All businesses (700).

It is not possible to make direct comparisons with 2019 as the wording for the statements and questions has been updated. That said, it is of note that the FSA's understanding of the needs of businesses and the FSA being effective in promoting regulations is rated lower than other attributes for both time periods.

Table 1.2 Confidence in the FSA achieving their aims in 2021 vs 2019

2021 Base all businesses 700

Statement	Percentage
The FSA is influential in maintaining standards within the food industry	95%
The FSA works hard to ensure that food safety and standards are maintained and improved within the food industry to protect the public from food related risks	93%
The FSA is good at identifying where poor standards exist and takes appropriate action	90%
The FSA understands the needs of businesses like yours	87%
The FSA effectively communicates and promotes regulations within the food industry	84%

2019 Base aware of the FSA 624

Statement	Percentage
The FSA is highly effective at regulating the food industry	84%
The FSA is working hard to improve the food industry for all of us	92%
The FSA is good at identifying where poor standards exist	88%
The FSA understands the needs of small food businesses	78%
The FSA is highly effective in terms of promoting regulations within the food industry	84%

The level of confidence in the FSA's ability to achieve their aims was generally at the same level regardless of sector, size or location of the business, with just a few notable exceptions by sector:

- Wholesale businesses had lower confidence in the FSA understanding the needs of business like theirs (67%)
- Accommodation businesses had lower confidence in three areas: the FSA's influence in maintaining standards (87%), the FSA working hard to ensure standards are maintained / improved (84%) and the FSA is good at identifying poor standards and taking action (79%).

In terms of the FSA communicating effectively and promoting regulations within the food industry, confidence levels were lower for sole traders (73% felt confident), and for businesses in England (83%, versus 92% of Northern Ireland businesses and 94% of Welsh businesses).

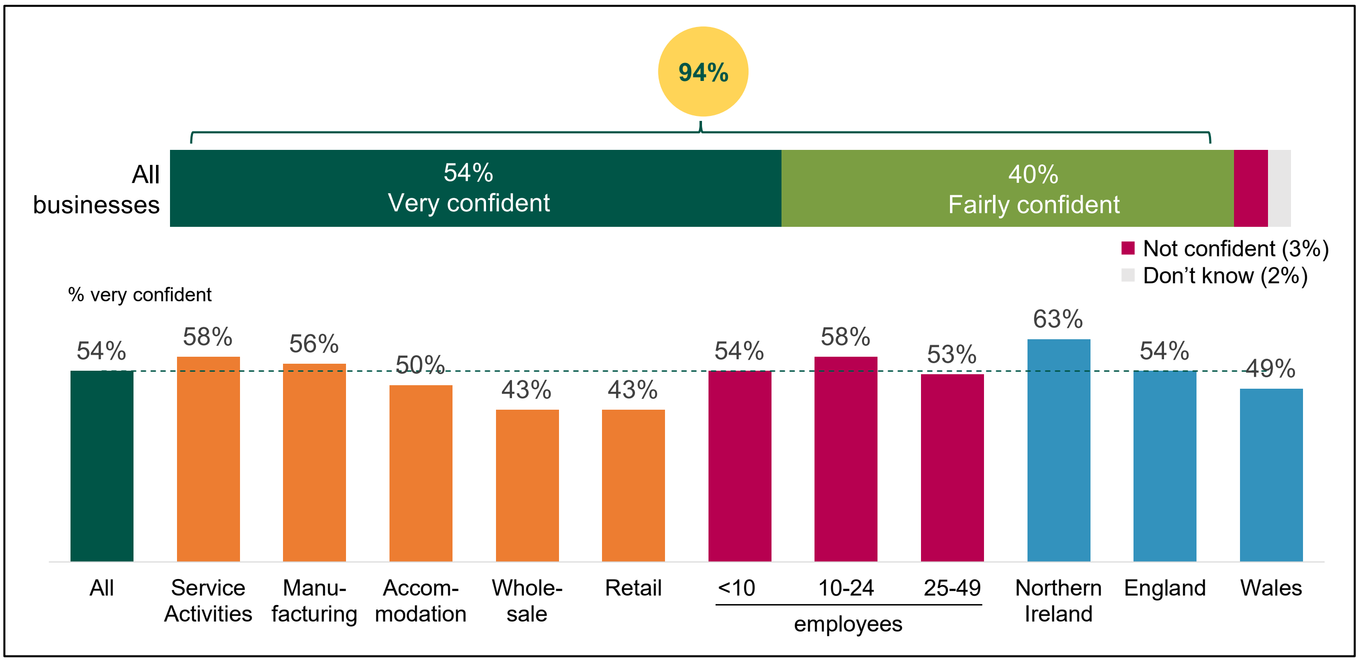
Confidence that the FSA can be trusted to uphold and promote high standards

When asked whether they were confident that the FSA can be trusted to uphold and promote high standards, nearly all businesses (94%) felt confident that the FSA achieves this, with just over a half (54%) saying they felt 'very confident'. Only a tiny minority (3%) were not confident or felt unsure (2%).

No direct comparison could be made to 2019 for this measure[4], although 95% of those aware of the FSA in 2019 did agree that they could trust the FSA to uphold and promote high standards.

[4] In 2019, this question was asked as a 'level of agreement' rating rather than a 'level of confidence' rating.

Figure 1.26 Confidence that "The FSA can be trusted to uphold and promote high standards"



Base: All businesses (mainstage only) (668); Service Activities (249), Manufacturing (110), Accommodation (104), Wholesale (80), Retail (125), <10 employees (421), 10-24 employees (164), 25-49 employees (83), Northern Ireland (81), England (480), Wales (107).

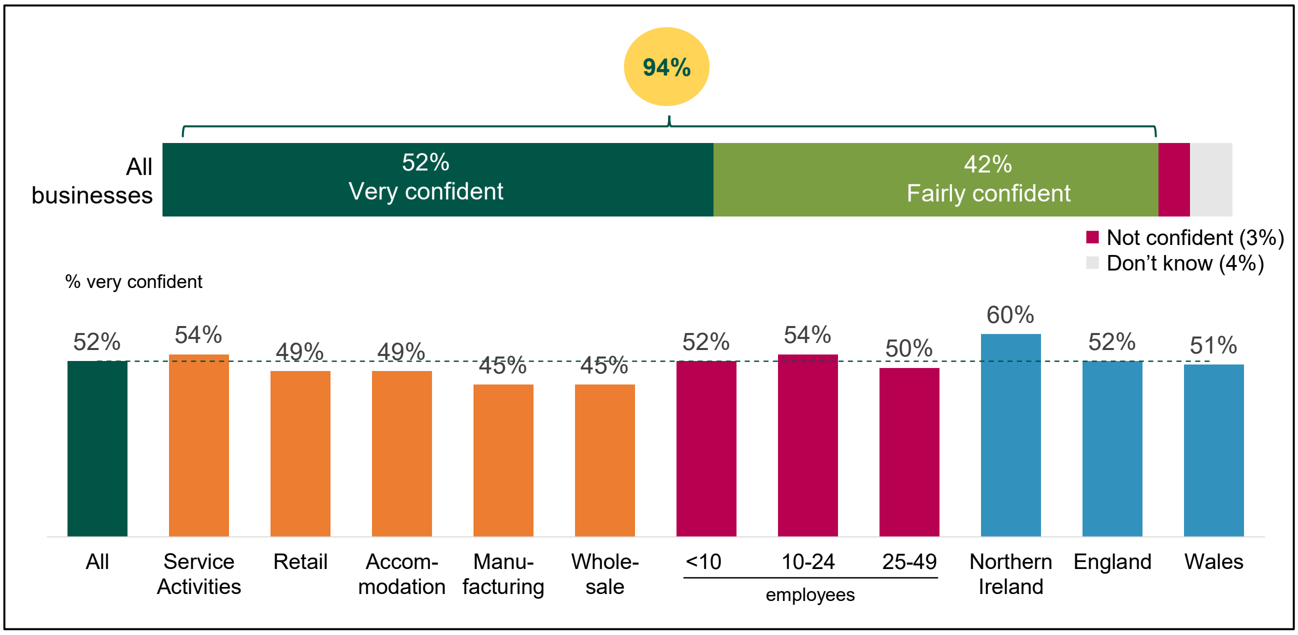
Around 9 in 10 businesses, regardless of their sector, size or location, said they were confident that the FSA upholds and promotes high standards. However, the results suggest that wholesale and retail businesses have a slightly lower degree of confidence, with only 43% of businesses in each of these sectors saying that they were 'very confident'. Businesses with a 0-2 FHRS rating also expressed lower confidence than average, with only 48% saying they were 'very' confident (compared to 62% with no rating and 53% with a 3+ rating). These findings by sector and FHRS rating were indicative, and not significant at the 95% confidence level.

Confidence that the FSA can be trusted to use any information appropriately

The level of confidence that businesses had in the FSA to use any information provided to them appropriately was at a similarly high level. Again, nearly all business (94%) were confident with the FSA in this respect, with just over a half (52%) saying they felt 'very confident'.

This rating is at a similar level to 2019, when 94% of those aware of the FSA agreed that they trusted the FSA to use any information they are given appropriately (please note that these results are not directly comparable).

Figure 1.27 Confidence that “The FSA can be trusted to use any information you give them appropriately”



Base: All businesses (mainstage only) (668); Service Activities (249), Retail (125), Accommodation (104), Manufacturing (110), Wholesale (80), <10 employees (421), 10-24 employees (164), 25-49 employees (83), Northern Ireland (81), England (480), Wales (107).

Once more, confidence levels were high across all the sectors, sizes and locations of businesses with around 9 in 10 confident (either ‘very’ or ‘fairly’) that the FSA uses business information appropriately.

Despite this, manufacturing and wholesale businesses showed a lower degree of confidence (Figure 8.8) and were more likely to say that they were ‘not confident’ in the FSA’s ability to use their information appropriately; 9% of manufacturing businesses and 8% of wholesale were not confident, compared to just 4% in retail, 2% in accommodation and 2% in service activities. Businesses in the accommodation sector were more likely than others to say they were unsure about the situation (9%, compared to 4% for all sectors).

9. Confidence in the food safety system

This chapter explores confidence in the effectiveness of food safety / hygiene standards and regulations, and also confidence in the UK food business sector to meet these food safety requirements.

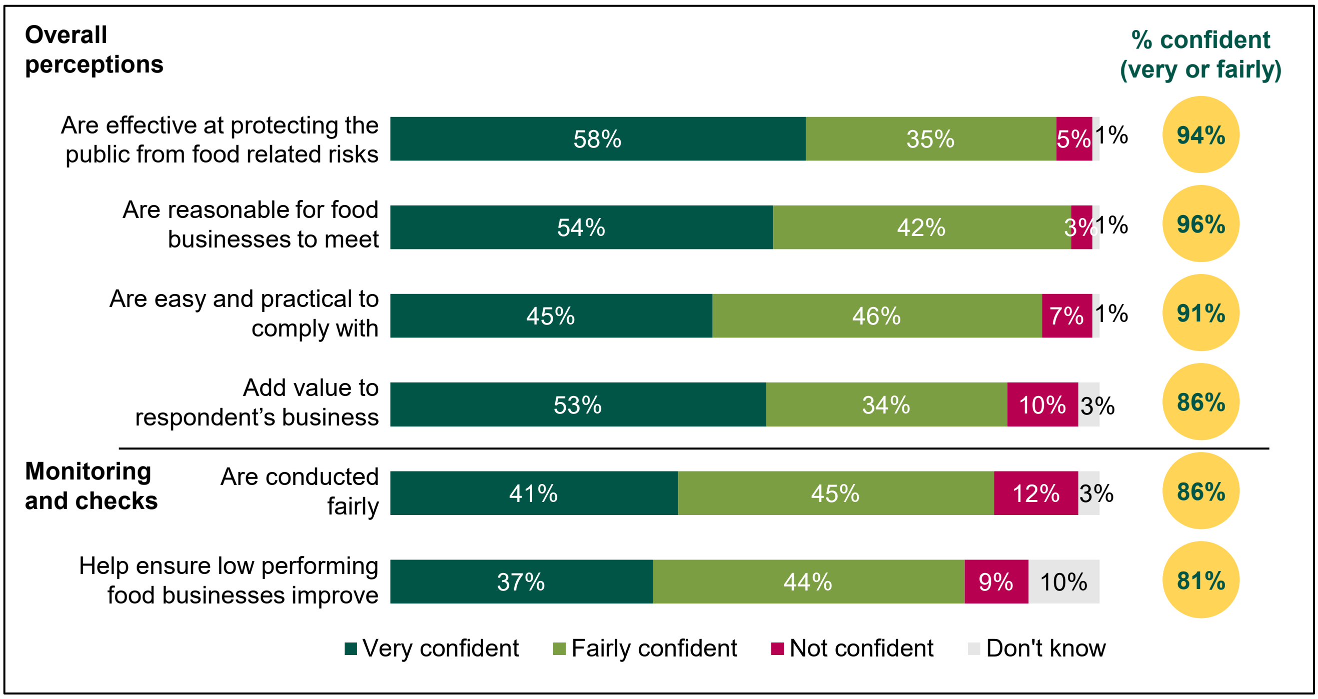
Confidence in the effectiveness and monitoring of food safety / hygiene standards

Businesses were asked to rate their level of confidence in the effectiveness of food safety / hygiene standards and regulations as well as their confidence in the way that these standards are monitored within food businesses. In both of these areas confidence was high, but confidence was higher for the effectiveness of the regulations than for the way in which standards are monitored.

As shown in Figure 9.1, businesses generally had very positive perceptions of food safety / hygiene standards and regulations. At least 9 in every 10 businesses agreed that: they are effective at protecting the public from food related risks (94%); they are reasonable for food businesses to meet (96%); and they are easy / practical to comply with (91%). Although overall confidence dropped marginally in terms of their added value to the business, there was still strong confidence in this area (86%).

In terms of the way in which food businesses are monitored and checked, confidence levels fell slightly although the vast majority of businesses were still confident about these aspects – 86% were confident that monitoring and checks are conducted fairly and 81% that they help ensure low performing food businesses improve. That said, around 1 in 10 businesses (12% and 9% respectively) were not confident about either of these areas.

Figure 1.28 Confidence in the effectiveness and monitoring of food safety / hygiene standards



Base: All businesses (700).

Comparisons with 2019 cannot be easily drawn due to changes in the question wording, although they do show that the areas of highest agreement in 2019 remain the areas of highest confidence in 2021.

Table 1.3 Confidence in the effectiveness and monitoring of food safety / hygiene standards in 2021 vs 2019

2019, Base all businesses: 644: Overall perceptions

Statements	Confidence in the effectiveness
Regulations are effective at protecting the public	96%
Regulations are reasonable for food businesses to meet	95%
Regulations are easy and practical to keep to	88%
Regulations add value to respondent's business	79%

2019, Base all businesses: 644: Monitoring and checks:

Statements	Confidence in the effectiveness
Are conducted fairly	89%
Help to ensure the worst performing food businesses will improve	88%

2021, Base all businesses: 700: Overall perceptions

Statements	Confidence in the effectiveness
Are effective at protecting the public from food related risks	94%
Are reasonable for food businesses to meet	96%
Are easy and practical to comply with	91%
Add value to respondent's business	86%

2021, Base all businesses: 700: Monitoring and checks

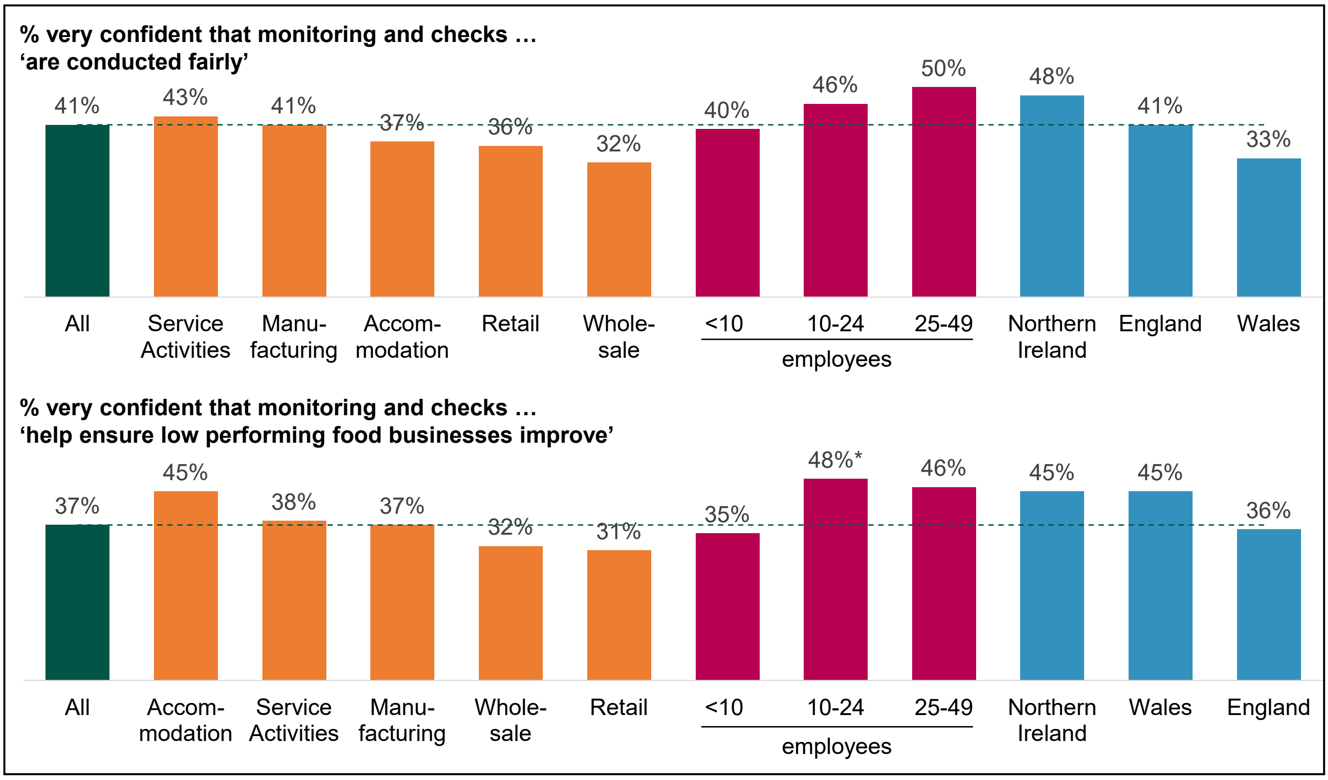
Statements	Confidence in the effectiveness
Are conducted fairly	86%
Help ensure low performing food businesses improve	81%

Confidence in the food safety / hygiene standards and regulations was high across all business sectors (and other business demographics). However, the degree of confidence for manufacturing businesses was lower for 3 out of 4 aspects measured. Only 38% were 'very' confident that they are reasonable for food businesses to meet, 35% were 'very' confident that they are easy and practical to comply with and 42% were 'very' confident that they add value to the business.

Regulations being effective at protecting the public from food related risk was the only metric to show any other real difference by business type, with practically all larger sized business (25-49 employees) confident in this area (99% against 94% of sole traders), and businesses in Northern Ireland also showing a greater degree of confidence (72% were ‘very’ confident, compared to 58% of businesses in England and 51% of businesses in Wales).

In terms of the regulations being monitored and enforced, again there was little real difference in opinions across types of businesses, although smaller sized business (<10 employees) were slightly less confident that the regulations helped low performing food businesses improve (only 35% were ‘very confident’ compared to 48% of businesses with 10-24 employees and 46% with 25-49 employees). These differences are highlighted in Figure 9.2 below. Furthermore, businesses with a low FHRS rating of 0-2 were much more confident (94%) that the monitors and checks in place helped low performing food businesses improve.

Figure 1.29 Confidence in the monitoring of food safety / hygiene standards



Base: All businesses (700); Service Activities (256), Manufacturing (114), Accommodation (110), Retail (138), Wholesale (82), <10 employees (436), 10-24 employees (179), 25-49 employees (85), Northern Ireland (85), England (505), Wales (110).

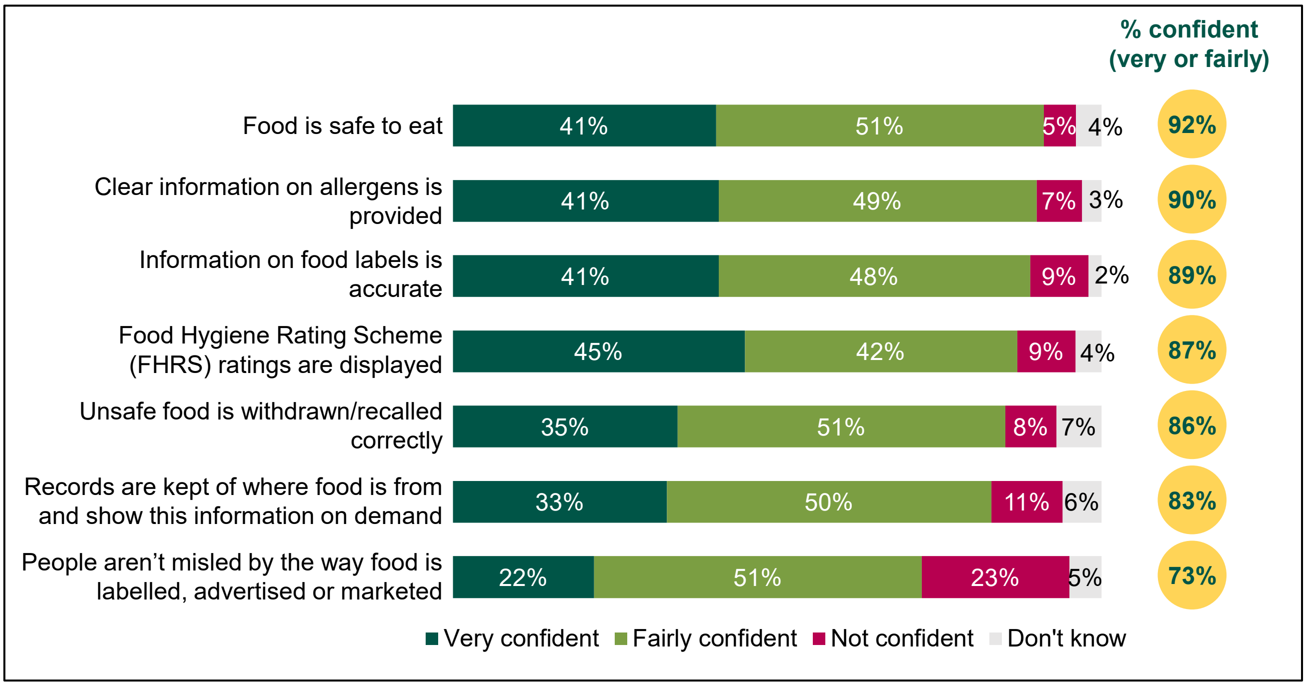
Confidence in food safety requirements being met

Respondents were asked to consider the UK food business sector as a whole and to describe how confident they felt that the sector met food safety requirements.

Overall, most were confident that food standards were being upheld although this was not universally felt in each and every area. Around 9 in 10 businesses felt confident that food is safe to eat (92%), clear allergen information is provided (90%), food labels are accurate (89%), FHRS ratings are displayed (87%) and unsafe food is withdrawn/recalled (86%). However, confidence was lower for records being kept (83%) and fell further still in terms of the potential for customers to be misled by the way food is labelled, advertised or marketed (73%). In fact, views amongst food businesses were fairly polarised for this latter aspect, with an equal proportion saying they are 'very' confident as saying they were 'not' confident (22% versus 23%). Most who were not confident said they were 'not very confident' (19%) rather than 'not confident at all' (4%).

It is not possible to draw comparisons to how opinion has shifted against 2019 as question wording around this topic has changed.

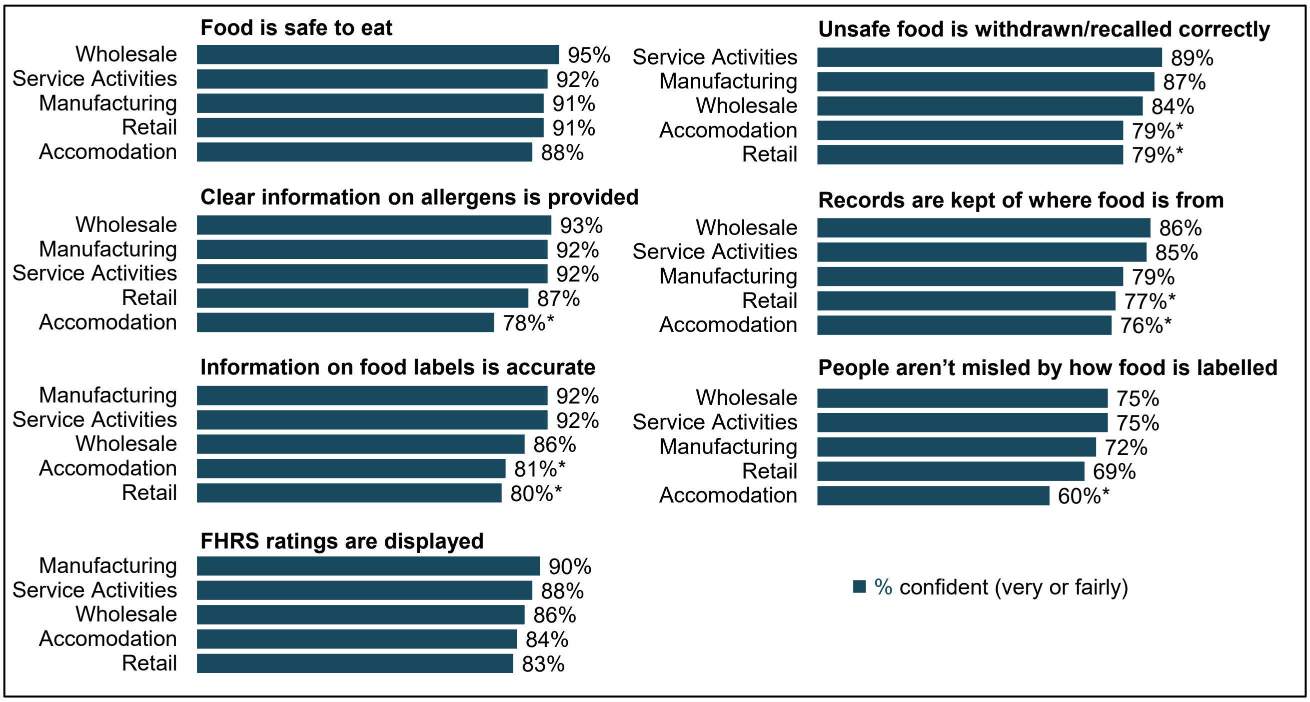
Figure 1.30 Confidence in food safety requirements being met



Base: All businesses (700).

As found for other measures in the survey, opinions by the various types of businesses were broadly similar. The most notable difference was by sector, with retail and accommodation businesses generally less confident that food safety requirements were being met across the industry (see Figure 9.4 below).

Figure 1.31 Confidence in food safety requirements being met by business sector



Base: All businesses (700); Wholesale (82), Service Activities (256), Manufacturing (114), Retail (138), Accommodation (110).

10. Business experience of food safety processes and interventions

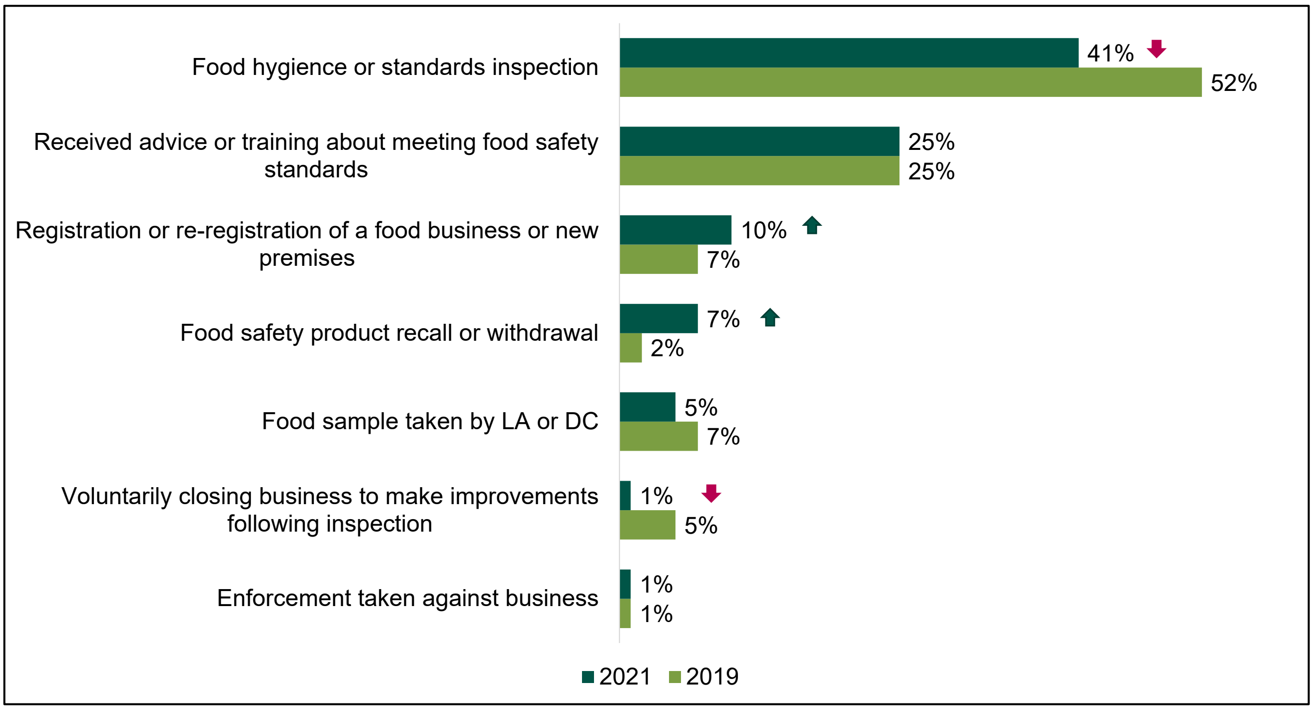
This chapter covers businesses' experience of interventions undertaken in relation to food hygiene and food safety, and the clarity of communication relating to these events. It goes on to explore the mechanisms they have in place to respond to recall or withdrawal requests, including training procedures, and use of the FSA template guidance.

Processes and interventions experienced

In 2021, around two-fifths (41%) of businesses had experienced a food hygiene or standards inspection in the last 12 months by their local authority (or, in the Northern Ireland by their District Council); this reflects a continued fall from 52% in 2019 and 63% in 2018. Perhaps related to this, there was also a fall in the proportion of businesses who had voluntarily closed to make improvements following an inspection (5% vs. 1%). However, as shown in Figure 10.1, the proportion of businesses receiving advice or training about meeting food safety standards remained stable, at both 25% in 2021 and 2019.

The proportion of businesses experiencing a food safety product recall or withdrawal in the last 12 months was higher than in previous years (7% vs. 2% in 2019 and 3% in 2018) and a slight increase was also seen in the registration or re-registration as a food business or new premises (10% vs. 7% in 2019).

Figure 1.32 Processes and interventions that businesses have experienced or been involved in within the last 12 months (prompted)



Base: All businesses 2021 / 2019 (700 / 644). Arrows indicate a significant difference between 2019 and 2021.

Food hygiene or standards inspections and food samples

Food hygiene or standards inspections were far more common in the manufacturing sector (62% vs. 41% overall). By contrast only a quarter (25%) of accommodation businesses reported an inspection in the last 12 months. Businesses in Wales were the least likely to have received an inspection (26%), and within England there was also significant variation by region, with London and the East of England more likely to have received an inspection (55% and 54% respectively). Those with the lowest FHRS rating were more likely to have experienced an inspection (60% of those with an FHRS rating of 0-2 vs. 36% of those with an FHS rating 5).

Similarly, those in the manufacturing and wholesale sectors were more likely to have had a food sample taken by their local authority or district council (18% and 10% vs.

5% overall). Larger businesses were more likely to have experienced this (13% of those with 25-49 employees), as were businesses in Northern Ireland (28%),[5]

Advice or training about meeting food safety standards or hygiene regulations

Again, businesses in the manufacturing sector were more likely to have received advice or training about meeting food safety standards or hygiene regulation (36% vs. 25% overall). This is likely to reflect the fact that they were more likely to have been inspected recently (44% of businesses who had received an inspection in the last 12 months had also received advice or training). There was no significant difference by size or country. Unsurprisingly, those with the lowest FHRS rating were the most likely to have received advice or training (39% of those with FHRS rating 0-2 vs. 20% of those with FHRS rating 5).

Food safety product recall or withdrawal

Overall, 7% of businesses had experienced a food safety product recall or withdrawal in the last 12 months. This was much more common amongst those in the wholesale and retail sectors (18% and 17% respectively), compared to just 4% of businesses in the accommodation and service activities sector. This difference could be led by the type of food sold at the establishments, as recalls and withdrawals were more common amongst businesses who sold pre-packaged food (13%). Sole traders were less likely than other businesses to have experienced a recall. No sole trader interviewed (0%) had experience a recall or withdrawal in the last 12 months however it should be notes that smaller businesses handle fewer products and are therefore less likely to be impacted by a product safety recall.

Table 10.1 shows interventions by nation, sector and FHRS rating.

[5] Although it should be notes that businesses in the Northern Ireland sample were more likely to have 10+ employees compared to England and Wales, and so this difference could be driven in part by the larger size of these businesses.

Table 1.4 Processes and interventions that businesses have experienced or been involved in with in the last 12 months by nation, sector and FHRS rating

Processes and interventions	Total	England	Northern Ireland	Wales	Manufacturing	Whole sale	Retail	Accommodation	Service activities	FHRS rating 0-2	FHRS rating 3+
Food hygiene or standards inspection	41	42*	26*	45	62*	40	40	25*	42	60*	39*
Received advice or training about meeting food safety standards	25	25	33	29	36*	20	24	25	26	39*	22*
Registration or re-registration of a food business or new premises	10	9*	15	15	8	12	10	5	10	7	6*
Food safety product recall or withdrawal	7	7	8	7	3	18*	17*	4	4*	9	7
Food sample taken by Local Authority or District Council	5	4*	28*	2	18*	10*	7	2	4	14	4
Voluntary closing of business to make improvements following inspection	1	1	1	0	2	0	1	1	1	13*	<1
Enforcement taken against business.	1	1	0	1	0	<1	<1	0	1	11	<1

Base: All businesses (700). * indicates a significant difference from total.

Clarity of communications relating to these events

Businesses who had experienced any of the events described above were asked about the clarity of the related communications. Overall, 94% of these businesses rated the communications they received to be clear, with three-quarters (75%) rating the communications as very clear. Businesses with an FHRS rating of 5 were more likely than others to rate the communications as very clear (84% vs. 63% of businesses with FHRS rating 0-2).

Awareness of requirement for all food business to be registered with local authority

The majority (94%) were aware that all food businesses, including online businesses, had to be registered with the local authority.

Sole traders were the least likely to be aware of this requirement (78% vs. 95% of businesses with 2 or more employees). There was also significant variation by country: 100% of businesses in Northern Ireland were aware of this requirement, compared to 94% of businesses in Wales and 93% in England. Further to this, there was considerable variation by region within England, with businesses in the South East being more likely than average to be aware of the requirement (100%) and businesses in the East of England less likely to be aware (84%).

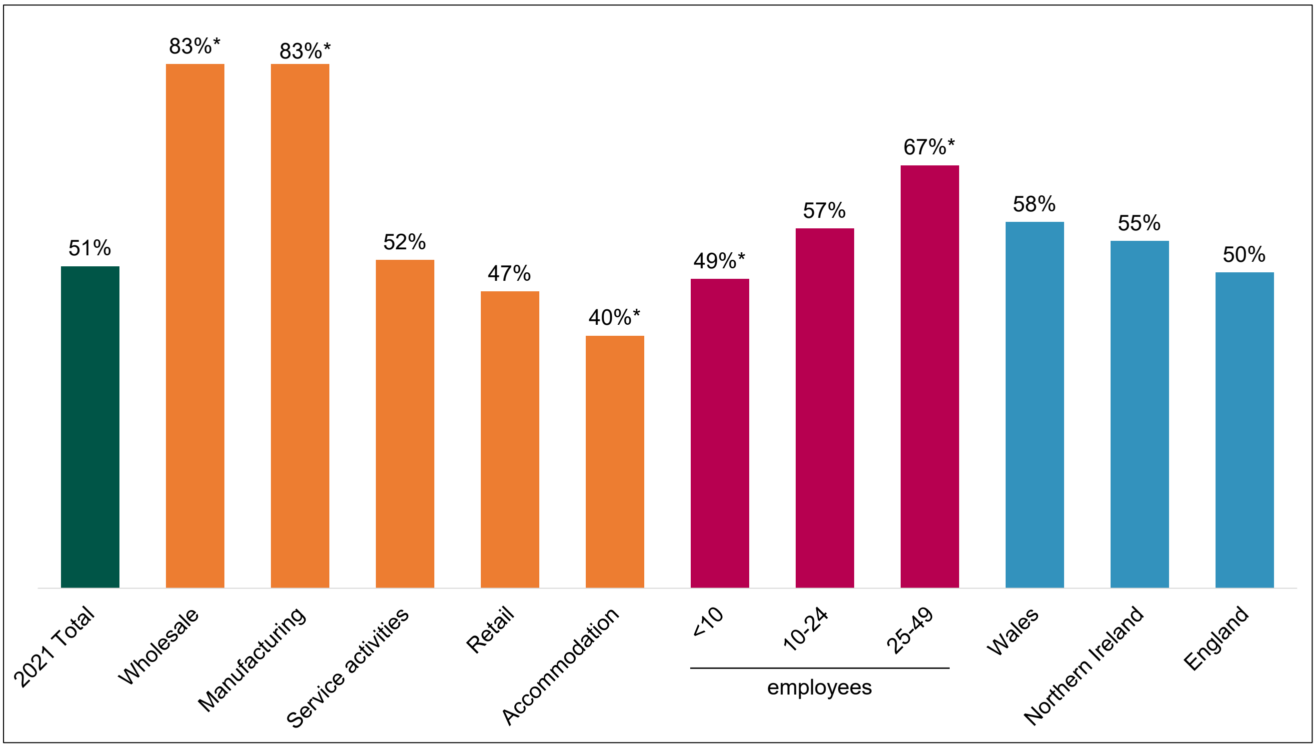
It is important to highlight that the question asked for awareness that *all* food businesses, *including online businesses,* need to be registered; this question was not asking if respondents were aware that their own business had to be registered. Businesses who trade online were more likely to say they were aware (99% vs. 91% of businesses who do not trade online), which implies that businesses who do not trade online are not aware that online businesses have to register with their local authority.

Procedures in place to deal with food recalls and withdrawals

Overall, half (51%) of businesses surveyed had written procedures in place to guide them on how to deal with a recall or withdrawal. This was in line with 2019 findings (52%), but lower than the percentage with written procedures in place in 2018 (60%).

As shown in Figure 10.2 below, businesses in the manufacturing and wholesale sectors were much more likely to have written procedures in place (both 83%). By contrast, only 40% of accommodation businesses had these. Larger businesses were also more likely to have written procedures in place (67% of those with 25-49 employees vs. 34% of sole traders), potentially reflective of a greater need for larger businesses to have procedures documented so they can be easily communicated to a greater number of staff. Interestingly, no distinct pattern could be seen by FHRS rating, those with a rating of 0-2 were just as likely to have written procedures as businesses with FHRS rating 5 (48% and 50%).

Figure 1.33 Whether have written procedures in place to deal with a food safety recall or withdrawal

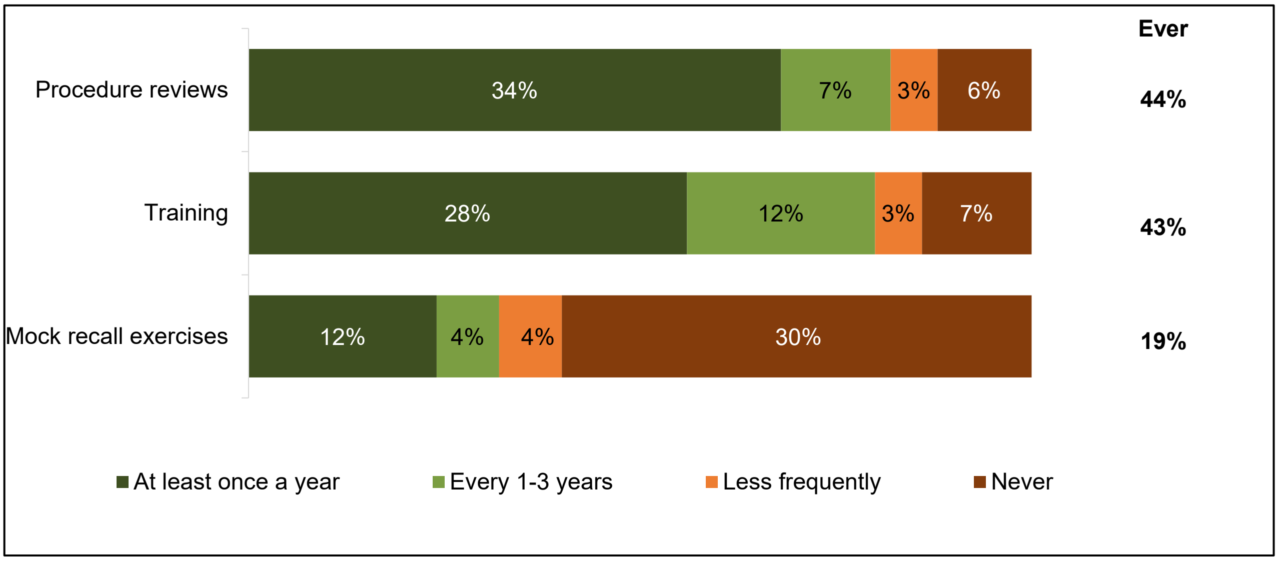


Base: All businesses (700); Wholesale (82), Manufacturing (114), Service Activities (256), Retail (138), Accommodation (110), <10 employees (436), 10-24 employees (179), 25-49 employees (85), Wales (110), Northern Ireland (85), England (505). * indicates a significant difference from total.

Training, procedure reviews and mock recall exercises

All businesses with written procedures in place to guide them on how to deal with a recall or withdrawal were asked how regularly they conduct related training, procedure reviews and mock recall exercises. The vast majority of businesses with written procedures in place conducted training (85%) and procedure reviews (86%). Far fewer (37%) conducted mock recall exercises. As shown in Figure 10.3, this relates to 43% of all businesses conducting this training, 44% of all businesses conducting procedure reviews and 19% of all businesses conducting mock recall exercises.

Figure 1.34 How frequently businesses conduct training, procedure reviews and mock recall exercises based on written procedures (base: all businesses)



Base: All businesses (700). 'Do not have written procedures in place' not charted - 49% for all rows. 'Don't know' not charted – no greater than 2% for all rows.

As previously outlined, businesses in the manufacturing and wholesale sector, and larger businesses, were more likely to have written procedures in place and so it follows that these groups were more likely to carry out training on this written guidance, procedure reviews and mock recall exercises as highlighted below:

- **Procedure reviews:** Over three-quarters of all businesses in both the manufacturing and wholesale sectors (77% and 78% respectively) carried out procedure reviews on their product safety recalls and withdrawal guidance. Those in the wholesale sector were the most likely to carry out these procedure reviews at least once a year (65%). Around six in ten (62%) businesses with 25-49 employees reported ever carrying out procedure reviews, compared with 31% of sole traders. Over half (53%) of businesses with 25-49 employees carry out these procedure reviews at least annually.

- **Training:** Nearly three-quarters (74%) of all businesses in both the manufacturing and wholesale sectors provided training on their product safety recalls and withdrawal guidance, with a half (52% and 51% respectively) conducting this training at least once a year. By contrast, 46% of businesses in the service activities sector, 35% in the retail sector and 26% in the accommodation sector ever provided this training. Larger businesses were more likely to conduct training (67% of those with 25-49 employees vs. 31% of sole traders). Almost half (48%) of businesses with 25-49 employees conducted training annually.
- **Mock recall activities:** Around a half of manufacturers and wholesalers (both 49%) conducted mock recall exercises, with 34% of manufacturers and 33% of wholesalers conducting these mock recall exercises at least once per year. In comparison, 18% of service activities, 18% of retail businesses and 12% of accommodation businesses ever carried out these mock recalls. Larger businesses were more likely to ever conduct mock recall exercises (29% of those with 25-49 employees vs. 17% of sole traders). Almost a quarter (23%) of businesses with 25-49 employees carried out mock recall activities at least once per year, compared with 11% of sole traders.

Awareness of the FSA online guidance and templates

Overall, approaching two-fifths (37%) of businesses were aware of the FSA online guidance and templates for dealing with recalls and withdrawals. There was little difference across sector, size or country.

Awareness of this FSA guidance correlated with business attitudes. Businesses who felt informed about regulations impacting their business were more likely to be aware of the FSA online guidance (40% vs. 17% of those who did not feel informed), as were those who felt confident that the FSA can be trusted to uphold and promote high standards (39% vs. 15% of those who were not confident).

Approaches to displaying Point of Sale Notices

All businesses who sell food directly to the public were asked an open text question about their approach to displaying Point of Sale Notices for recalls and withdrawals.

Responses were very varied. Many were unsure on the process as this had never experienced a food recall or withdrawal, and some felt it would never be applicable as, due to the size and nature of their business, they did not expect to be impacted by a recall.

“Not applicable - we are small bakery making food on the premises.”

Manufacturing, 2-9 employees

Many businesses were initially unsure what a Point-of-Sale Notice was, having not heard this particular term before, and required further definition from the interviewer. Those that were able to cite an approach typically mentioned posters in store, usually on the window, in A4 size at the till or next to the product. Businesses also commonly cited using social media, typically Facebook.

“It’s placed in the window display and within the shop on the walls clearly at eye level - also on the website and on Facebook and socials - until we have had return of products affected”

Retailer, 2-9 employees

Some businesses explained that the approach to Point-of-Sale Notices would vary depending on the type of product being recalled.

“We place it in front of the till, printed notice in store [and] on Facebook...dependent on the product and its popularity.”

Other businesses, particularly manufacturers, held customer details and so were able to contact them directly.

“We have 80% of our customers’ contact numbers so our first point of call is to ring customers. We provide doorstep delivery and so talk to them at that point as well.”

Manufacturer, 10-24 employees

“On the front of the display on the Perspex screen for customers, on wholesale recall we'd email and also ring them.”

Manufacturer, 10-24 employees

The amount of time notices were displayed typically varied between 2 and 6 weeks, with businesses rarely having a set amount of time that they keep notices on display

“We leave it on the window and on the shelves, A4 size, for a week or two.”

Retailer, 1-9 employees

“We’ll put a poster up by the entrance or exit of premises. It’s displayed until I received further word from the supplier.”

Wholesale, 10-24 employees

“A notice [in the shop and] on the website with the product, on email and social media, [displayed for] anything from a month to 6 weeks.”

Retailer, 1-9 employees

Whilst the approach taken to Point-of-Sale Notices varied greatly between businesses, only a very small number of businesses reported that they just took the product out of circulation and did not display a notice at all.

“We take out boxes to take them out of circulation. It rarely happens. We don't have a notice.”

Retailer, 1-9 employees

11. Food Crimes

This chapter explores businesses' awareness of the National Food Crime Unit (NFCU), the dedicated law enforcement function of the Food Standards Agency. It goes on to review businesses' experience of food crime, and their approach to reporting this.

Awareness of the National Food Crimes Unit

Businesses were asked if they were aware of the National Food Crime Unit (NFCU). A minority (20%) of businesses were aware of the NFCU in 2021, a similar proportion as found in 2019 (17%) and 2018 (18%).

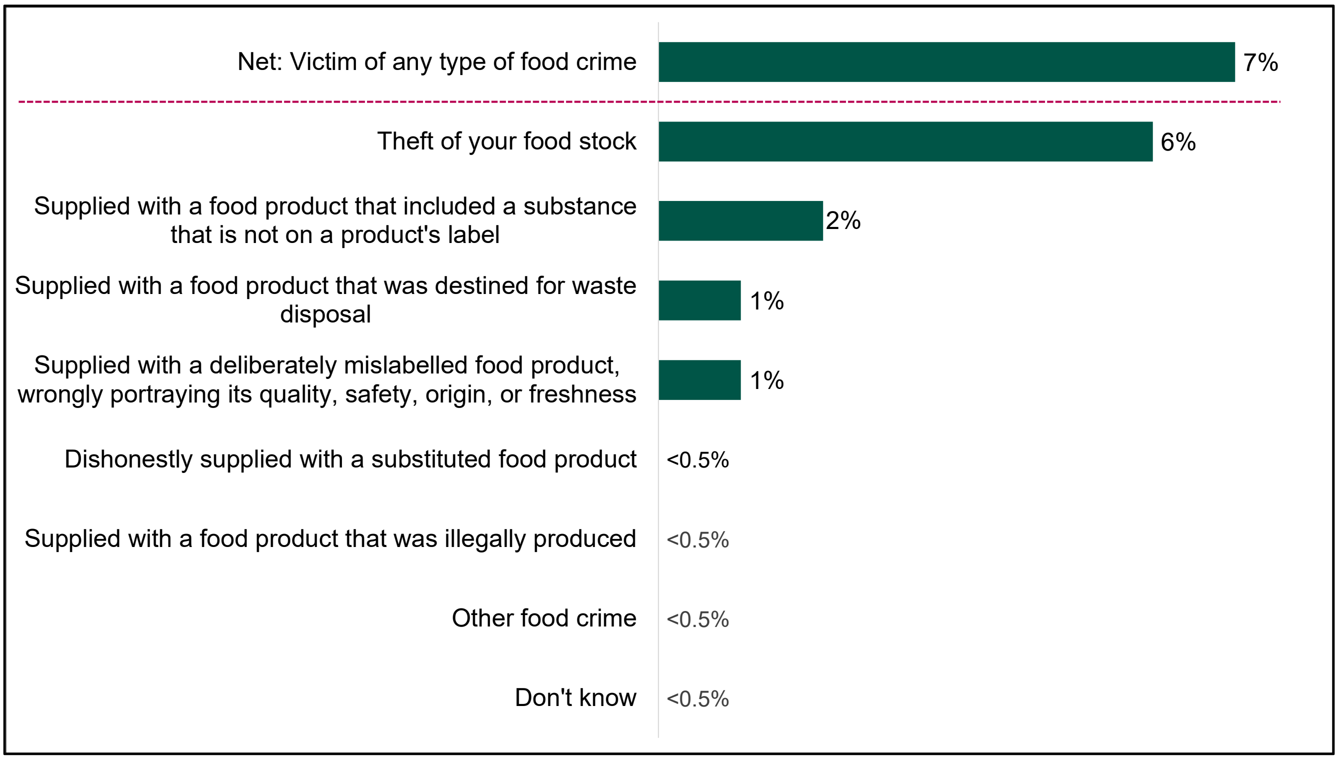
There were a couple of notable differences by subgroup, with businesses in England (21%) much more aware of the NFCU than businesses in Northern Ireland (5%), and slightly more aware than businesses in Wales (15%). Awareness by sector was relatively consistent, with the exception of accommodation businesses, who had much lower levels of awareness (8%). Businesses with a low or no FHRS rating also displayed higher levels of awareness (31% among those with 0-2 FHRS rating, 27% with no FHRS rating).

Prevalence of Food Crimes

Businesses were presented with a list of types of food crimes and asked whether they had been the victim of any of these over the preceding 12 months. As shown in Figure 11.1, only a tiny minority (7%) reported that they had been a victim of food crime in this period, with most businesses (92%) reporting that they had not.

The most common food crime was theft of food stock (6%), followed by being supplied with a food product that included a substance that is not on a product's label (2%).

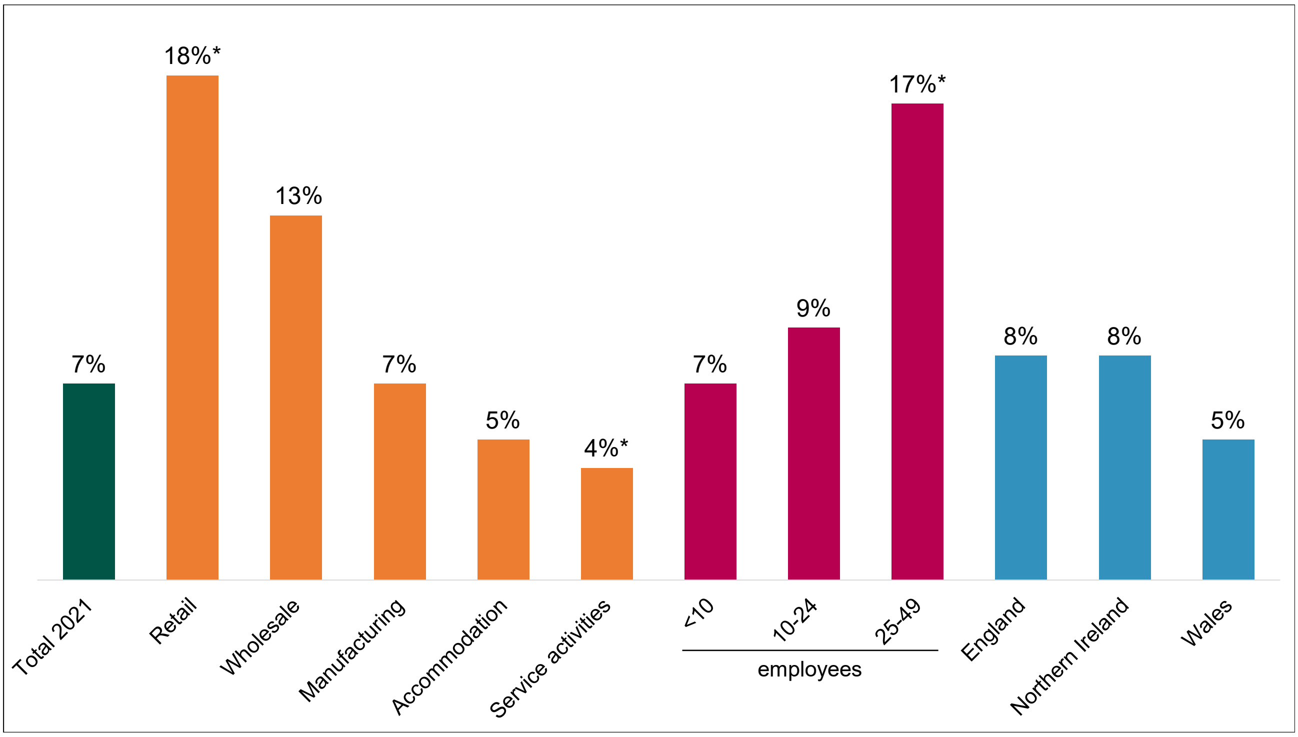
Figure 1.35 Prevalence of food crimes



Base: All businesses (700)

Retail businesses (18%) were most likely to report any type of food crime, along with larger businesses of 25-49 employees (17%), as shown in Figure 11.2.

Figure 1.36 Businesses that have experienced food crime over the last 12 months, by sector, size and country



Base: All businesses (700); Wholesale (82), Retail (138), Manufacturing (114), Accommodation (110), Service activities (256); Sole traders (59), 2-9 employees (377), 10-24 employees (179), 25-49 employees (85), England (505), Northern Ireland (85), Wales (110).

Other key differences to note are:

- Regionally, there were more victims of food crime in London (15%) and the South East (13%) than other parts of the country.
- There were also differences in food type, with victims of food crime being more common among those who sold pre-packaged food products (11%), with much lower instances of food crime occurring for those who produced and sold (unpackaged) on premises (4%) and those who sold as a meal or take-away (5%).
- Importers were also more at risk of food crime, with 26% experiencing any type of food crime compared to 7% of businesses that did not import or export.

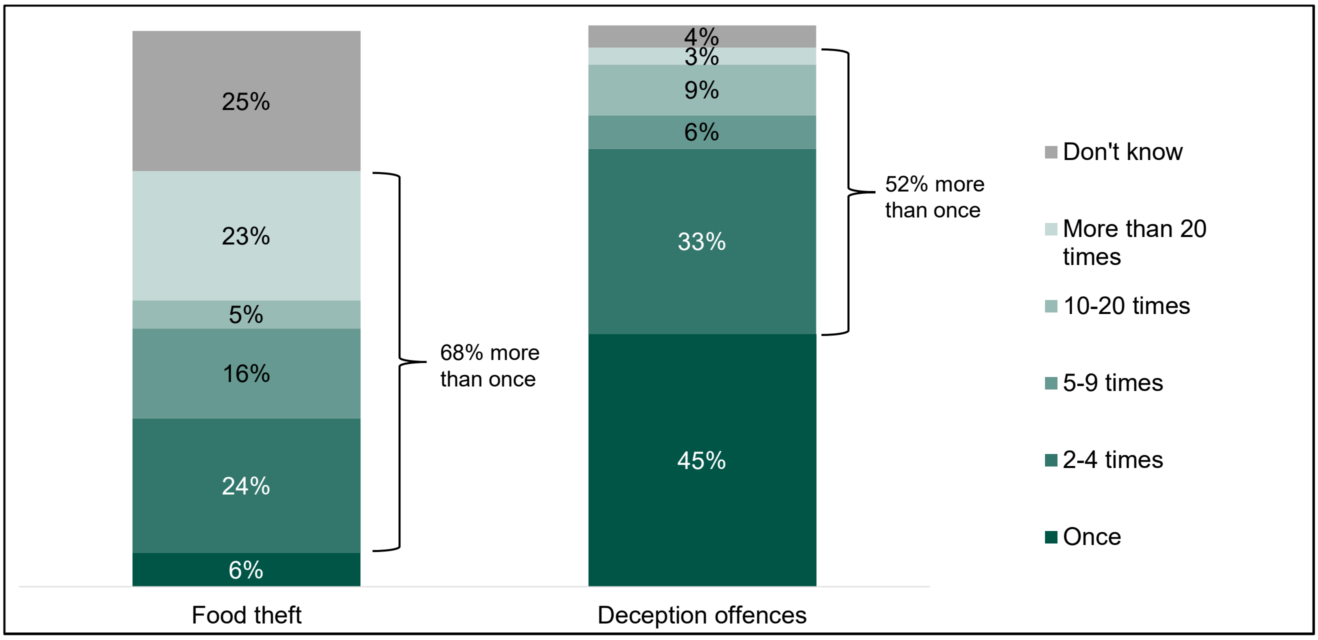
Across all types of businesses who were more likely to experience food crime, the theft of food stock was consistently the most common type of crime committed.

Occurrence and cost of food theft and deception

Victims of food theft were asked how often they had been a victim in the last 12 months, and to estimate the costs of these crimes. Frequency of occurrence of theft was varied, but it was rarely an isolated incident, with 68% stating it happened more than once. Despite food theft victim rates being low overall, this indicates that certain types of food businesses are more vulnerable to food theft than others, or they have better systems in place to identify theft and estimate its occurrence. It is interesting to note that one quarter of food theft victims were unable to estimate the frequency of these events.

Victims of other deception offences (i.e. all other crime except food theft) were asked how commonly they have been a victim of these, and to estimate the costs of these crimes. Deception offences seemed to occur less frequently overall, with 45% reporting one offence in the preceding 12 months, and 33% reporting it occurred 2-4 times. Only four per cent stated they did not know the frequency, a much lower proportion than those who were uncertain of the number of food thefts they had experienced.

Figure 1.37 Frequency of food theft and other deception offences



Base: All businesses who were a victim of food theft in the last 12 months (47) and all businesses who were a victim of other deception offences in the last 12 months (27). Caution low base size.

Overall, the cost of food theft on businesses is low. For the majority of businesses, the costs of food theft in the last 12 months were in the lowest bracket provided in the survey, of <£999 (59%). One in eight (13%) reported costs came to £1,000-£9,999, while four businesses reported thefts that cost more than £10K. The remainder were unable to estimate costs. Similarly to estimating the frequency of these events, 27% did not know the cost.

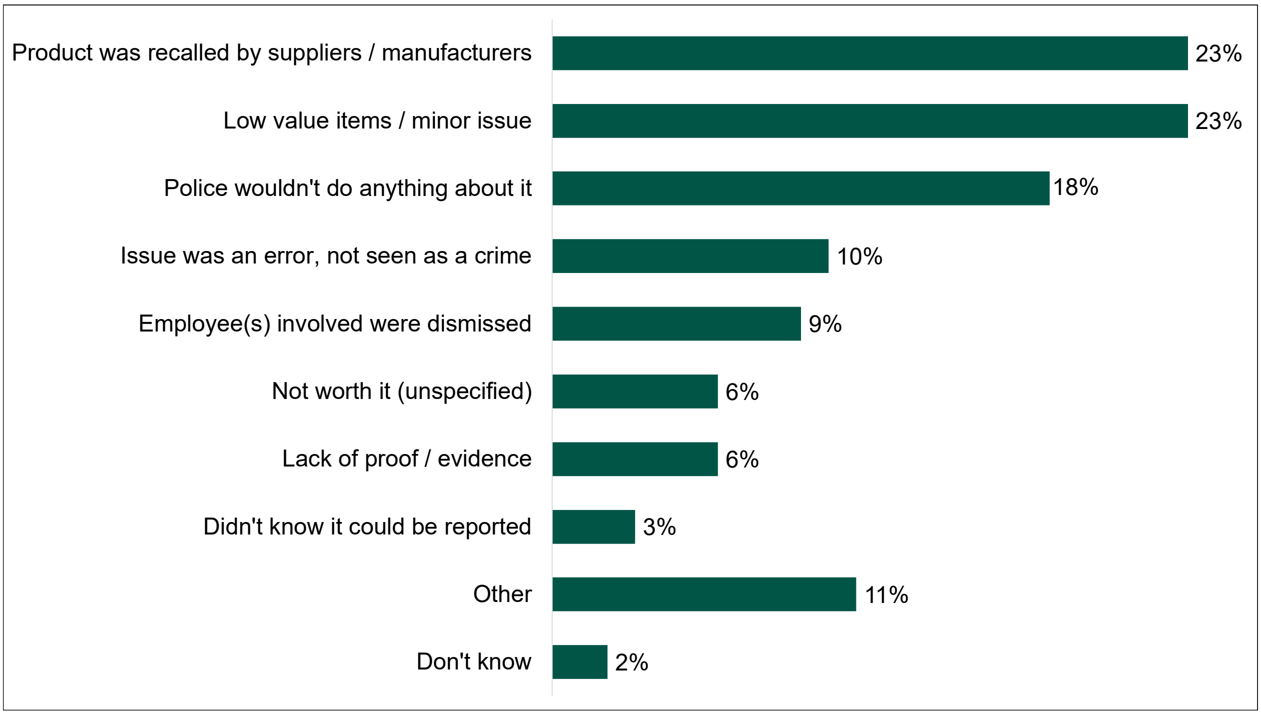
Deception offences typically cost less than food theft, with 67% saying reporting these other deception offences cost less <than £999.

Reporting food crimes

Around a quarter (23%) of businesses who experienced food crime in the last 12 months went on to report this (16% on all occasions this happened, the remainder only on some). That left a majority (76%) who did not report crimes at all.

The reasons provided for not reporting food crime were varied, as shown in Figure 11.4.

Figure 1.38 Reasons for not reporting an incidence of food crime



Around a quarter (23%) reported that the product was recalled by suppliers / manufacturers, although it appears that some businesses may be conflating the recall process with food crimes more generally, potentially inflating the previously cited deception offence figures. Examples can be seen below:

"Because I was already notified and the product was already recalled."

Retailer, 2-9 employees

"They already recalled the product."

Wholesale, 10-24 employees

The same proportion (23%) of businesses also considered that the low value of the item meant the crime was not worth reporting. A slightly lower proportion (18%) stated they did not report because did not expect the police would do anything about it, in part because they considered the crime too trivial:

"They were not big enough values for the police to worry about."

Retailer, 10-24 employees

"Too busy / overhead costs."

Accommodation, 10-24 employees

"It's too minor an offence, and we could not catch the persons."

Service activities, 10-24 employees

Only three per cent were unaware that they could report a food crime.

These comments also shed some light on why 27% of businesses were unable to assess the frequency or costs of theft on their business. It seems some businesses only became aware of theft once they assessed their stock levels.

"We didn't know [there had been a crime] until after the fact during stock taking."

Retailer, 2-9 employees

Base: All businesses who were victims of food crime who did not report the crime (53)

The few businesses who did report food crime were asked who they reported the crime to. Six in seven of reported crimes were reported to the police. Just one business reported to the NFCU (or FSA) and only one reported to their Local Authority.

12. Importing and Exporting

This chapter provides evidence on the amount of import and export activities businesses have engaged in over the last 12 months, and how this expected to change over the next 12 months. It is important to note that while time series changes have been emphasised in this chapter, there were some minor amends made to the questionnaire that might have had an impact on survey results[1].

Importing

Businesses were asked if they directly import food at present. In 2021, only a small minority (4%) of businesses were importing. Assessing this over the previous surveys shows a downward trend in importing rates which were at 10% in 2019 and 15% in 2018.

There was considerable variation in importing levels by sector, as shown in Figure 12.1. It was much more common in wholesale (45%) and manufacturing (20%), and slightly more popular in retail businesses (7%). It was less common in accommodation (1%) and service activities (3%).

Larger businesses were also much more likely to be importing with 12% of businesses that had between 25-49 employees importing, as were those in Northern Ireland (8%).

Importing activities dropped across the food business sector, however it was particularly acute in the accommodation sector (6% imported in 2019 compared to

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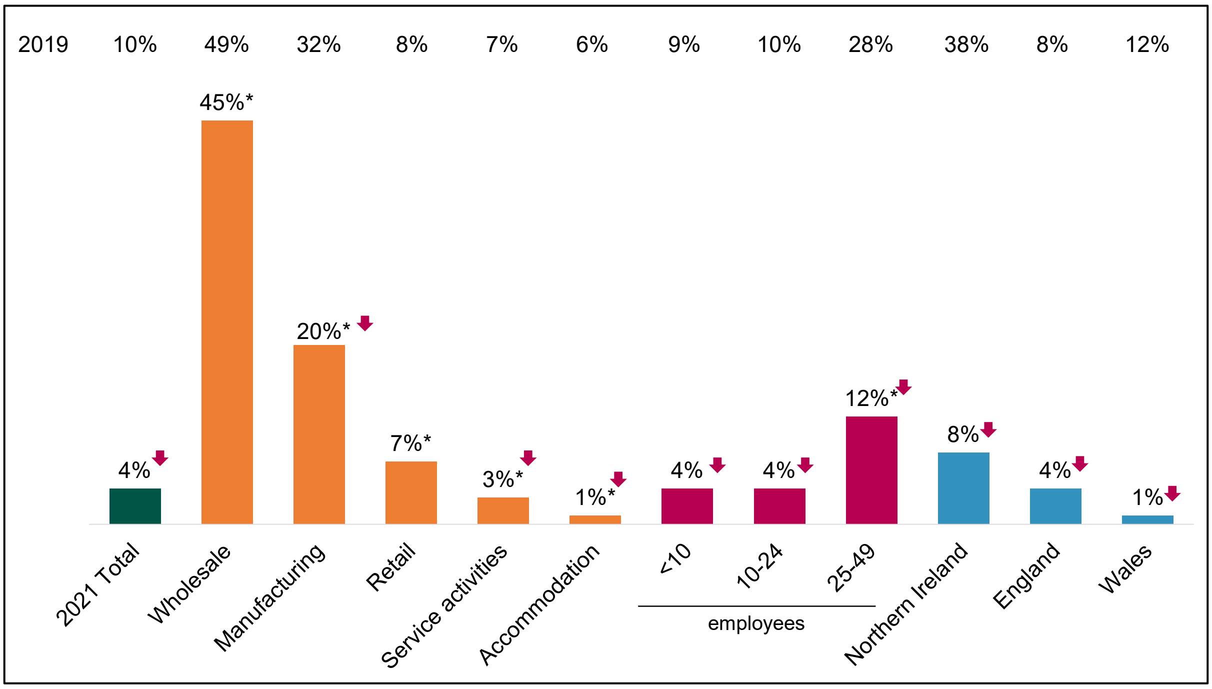
[1] Specifically, in 2019, businesses were asked whether they directly import or purchase any goods or services from a supplier, producer or wholesaler situated outside the UK? They were then asked for further details about this before asking a similar question about exporting. In contrast, in 2021, businesses were asked an initial question of whether they had ever imported or exported goods or services from a supplier outside the UK, or whether they intended to do so in the future. Those answering ‘Yes’ were then asked the same questions as in 2019. This was done to reduce the burden on respondents if they did not engage with any importing or exporting activities at all.

just 1% in 2021), among larger employers (28% of businesses with 25-49 employees imported in 2019 compared to 12% in 2021), and businesses in Northern Ireland (38% down to 8%) and Wales (12% down to 1%).

Figure 1.39 Importing behaviour by sector, size and country



Base: All businesses 2021/2019 (700/644); Wholesale (82/62), Manufacturing (114/91), Retail (138/110), Service activities (256/224), Accommodation (110/116), <10 employees (436/413), 10-24 employees (179/160), 25-49 employees (85/71), Northern Ireland (85/46), England (505/498), Wales (110/100).

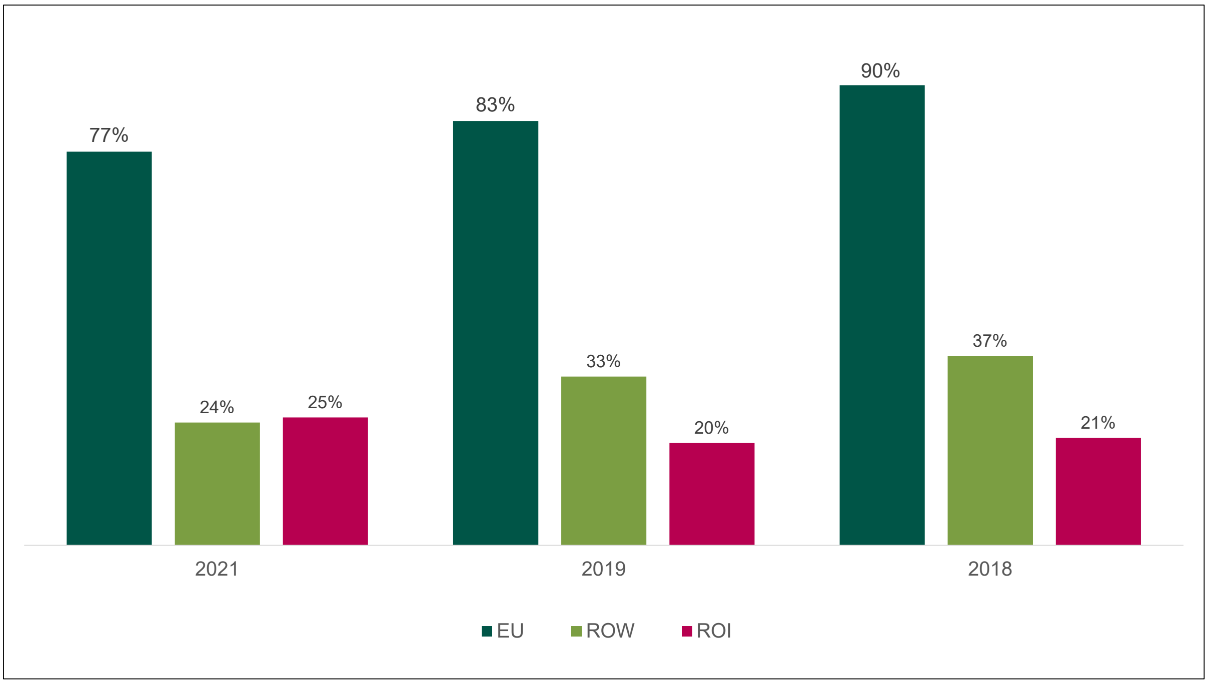
Importers were asked directly how their importing behaviour has changed over the last 12 months. Despite the reduction seen in the survey's year-on-year figures, 98% of the businesses surveyed had not experienced a change in their importing levels.

Looking forwards, nearly all (96%) businesses expected no change in their importing activity over the next 12 months. Of those who did expect a change, 1% planned to start importing, 1% planned to decrease importing, and 1% planned to increase importing.

Import origin

Importers were asked where these importing suppliers or producers were based. In 2021, the EU was still the favoured supply location with 77% of importers obtaining products from there. This has however also continued a downward trend where of the equivalent proportion was 83% in 2019 and 90% in 2018. As shown in Figure 12.2, there has been a commensurate reduction in importing from the rest of the world outside of the EU as well (down to 24% by 2021), although no change in the proportion importing from the Republic of Ireland (hovering at around a quarter).

Figure 1.40 Change in import origin over time



Base: All businesses that import; 2021 (76), 2019 (103), 2018 (98).

Exporting

Exporting practices were much lower than importing practices, with only one per cent of businesses reporting that they exported any food or drink products. Similar to the situation with exploring, this represented a drop from 4% in 2019, and 3% in 2018.

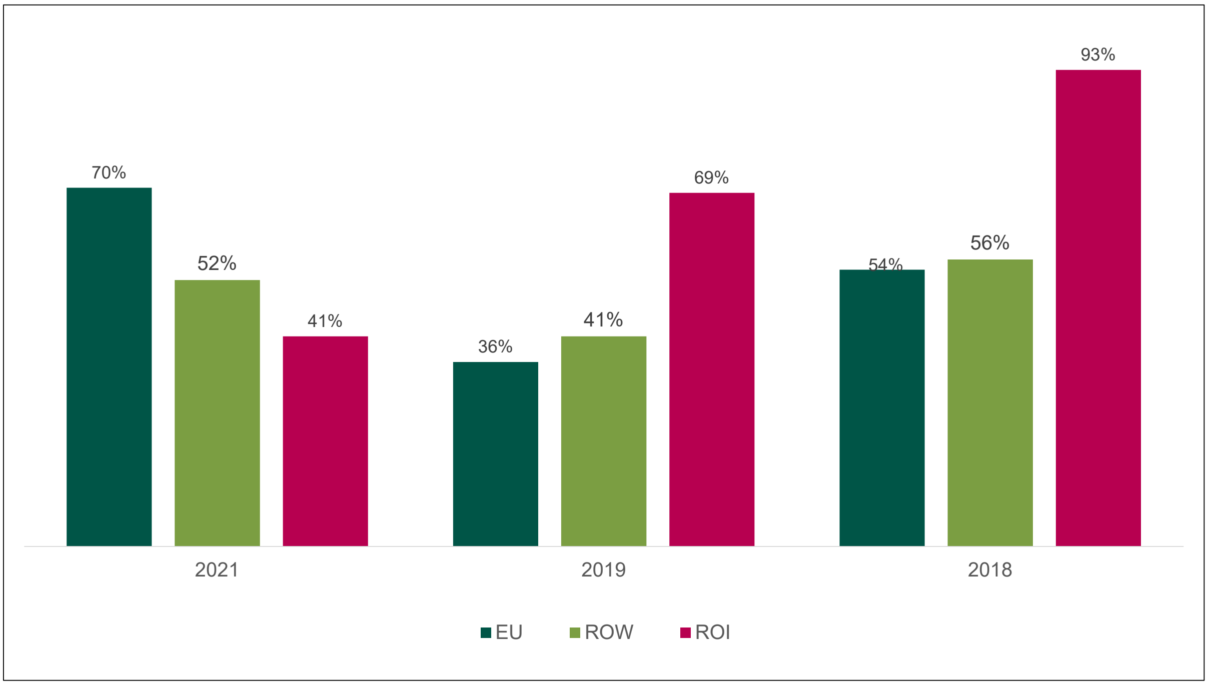
There was little difference in exporting behaviour by size or country. However, both wholesale (19%) and manufacturing (7%) businesses were much likely to export.

Businesses were asked how their exporting behaviour has changed over the last 12 months. Despite the reduction seen in the survey's year-on-year figures, 99% of those surveyed had not experienced a change in their exporting levels. The 1% that had had stopped exporting. Over the next 12 months, again nearly all (99%) expected no change in their exporting activity.

Export destination

The EU was the most favoured supply location, with 70% of exporters exporting products there. Outside of the EU (52%) was the next most favoured destination followed by exports to the Republic of Ireland (41%). There has been considerable movement in this regard over the last few years. Whereas the Republic of Ireland was the most common export destination in 2018 (93% exported here), and the EU the least common (54%), this order had reversed by 2021, as shown in Figure 12.3

Figure 1.41 Change in export destination over time



Base: All businesses that export; 2021 (27), 2019 (43), 2018 (30). Weighted percentages used to allow for time series comparison.

13. Conclusions

The tracker survey with small and micro FBOs focussed on exploring the following research aims:

- To gain insight, and understand the implications of UK's exit from the European Union (EU) on small and micro enterprises
- To 'unpack' attitudes towards regulation to deepen insights and knowledge of small and micro enterprises
- To measure trust in the FSA and extent to which FSA is considered a modern, accountable regulator

We take each in turn below.

The implications of the UK's exit from the EU

Around half of businesses reported some sort of impact as a result of the UK's exit from the EU. For the majority this resulted in a negative or mixed impact, with wholesalers and businesses in Northern Ireland particularly affected. Only a tiny minority reported positive impacts, which is notably smaller than the proportion that expected positive impacts from the UK's exit from the EU in the 2019 survey.

Businesses for whom the EU exit had an impact most commonly cited that their profit margins decreased, and the availability of food decreased. In the media, longer delivery times and recruitment difficulties are often associated with impacts resulting from the EU exit, but only one-fifth of those who had experienced impacts (and therefore one in ten of all businesses) reported this had occurred.

Potentially linked to the EU exit, there has been a clear drop in the proportions of businesses importing and exporting, such that only a tiny minority were involved in these activities in 2021.

Attitudes of small and micro enterprises towards regulation

The vast majority of small and micro FBOs were confident about the effectiveness of regulation in the industry. While still high, there was slightly less confidence in the way that regulations are monitored. This suggests there is room to improve or widen the monitoring and check process, or better promote the work that is done in this space. It was noticeable however that nearly all lower FHRS rated businesses were confident that the monitoring and checks helped to ensure low performing food businesses improve, suggesting that those who see this first hand are clearer about the benefits.

There was reassuring evidence of compliance with regulations, although signs that pockets of the sector are not engaging as they should. For example, most provide allergen information to their customers, though this was less common in the accommodation sector, and among smaller employers. Furthermore, the format by which businesses provided information to customers was varied, inconsistent and in a sizeable minority of cases was fully reliant on the customer being proactive.

Nearly all employers provided training to staff on food safety guidelines and regulations, however only a minority did so on a formal basis. Meanwhile around half had written procedures in place to deal with a food safety recall or withdrawal. This lack of formal training and procedures is likely to increase the risk that when food safety issues occur, staff are not best placed to respond to these in an efficient and effective manner. This could be particularly problematic in accommodation, where employers were least likely to provide formal training to staff on food safety and least likely to have written recall and withdrawal procedures in place (although they were also far less likely to receive recall notices).

In terms of safety requirements, while the sector was fairly positive in its perception of how food safety requirements are met, there was a common concern that there is potential for customers to be misled by the way food is labelled. This suggests that more work could be done to ensure clearer, more engaging labelling.

Typically, businesses were making efforts to encourage customers make healthier choices, through introducing a wide range of options, or changing ingredients in their products. However, we cannot determine the breadth of these efforts, nor their impact through this survey.

Attitudes towards the FSA

Awareness of the FSA was high, although only three in 10 knew a lot about them (there was relatively little subgroup variation). A similar proportion had heard of the FSA news and alert service. This lack of awareness is likely to limit the impact of FSA's interventions and communications. Nevertheless, it should be borne in mind that only a small minority (one in nine) were not confident the FSA effectively communicates and promotes regulations. It is also reassuring that where the FSA has communicated with businesses, their experience has generally been very positive. Furthermore, the majority were also confident the FSA are achieving their aims.

Most felt well informed about regulations affecting their business, although this somewhat camouflages the fact there was a drop in the proportion of businesses that felt 'very' well informed since 2019, possibly due to the various changes to the sector resulting from the UK's exit from the EU, and the Covid-19 pandemic. It is also important to note these are self-reported perceptions; many might not know how informed they are. With the most common source of information being the FSA website, it suggests that businesses are needing to be relatively proactive in seeking information. This increases the risk that those with less engagement or interest in food safety guidelines and regulations may not be receiving the information they need.

Nearly all businesses communicated in English and were content to receive communications in English. It should however be noted that businesses who do not speak English as a first language were perhaps less likely to take part in the survey.

Other trends of note

There has only been a slight increase in the sector's use of online platforms to either promote their business or take food or drink orders. Indeed, only a tiny minority of businesses reported that the majority of their turnover were derived from online sales. This is somewhat surprising given the impact the Covid-19 pandemic had on consumer behaviour with regards to purchasing food and drink.

It is clear that Covid-19 more generally has proved a substantial issue across the sector, and in particular for service activities businesses, owing to changes in consumer behaviour, and due to some of the restrictions caused by the pandemic. More positively, leading concerns identified in 2019, such as a competition from larger businesses, and a lack of adequate broadband, have become less common, although it is possible that the perception of their impact has reduced owing to the conceivably greater challenges of the pandemic.

Food crime rates were relatively low, with food theft the most common crime (hence crime rates were highest among retail businesses). Food crime levels were also much higher among businesses whose primary language was not English. However, very few went on to report this crime, and indeed only one in five were aware of the NFCU. This is mostly because they did not feel that reporting was worth their time due to the low value of the stolen product, however it does point to difficulties the FSA has in fully comprehending the extent of food crime in the industry.

14. Annex 1: Business profile

This chapter summarises the characteristics of micro and small food business operators (FBOs) as represented by survey respondents. The data is weighted by sector, nation and size, to a combination of the FSA business database, and the latest available ONS IDBR statistics at the time of the survey (March 2021). All percentages reported in this annex reflect this weighted profile used for reporting. Further detail on the weighting approach can be found in the supporting technical report. On this basis, the profile of the sample as described should therefore be a reliable description of the actual in-scope business population.

Number of sites

The vast majority of these FBOs are single site establishments (96%). This reflects the exclusion of FBOs with 50 or more employees from the survey. Overall, just 3% have 2 premises and 1% have 3 or more premises.

Around four in 10 (41%) businesses with 25-49 employers have more than one site, and 6% of them have 6 or more premises. Unsurprisingly, businesses with fewer than 10 employees are most likely have only have one premises (98%).

Number of employees

The majority of the FBOs have fewer than 10 employees (83%), with 8% being sole traders. One in seven (14%) have 10-24 employees and the remaining 3% had between 25-49 employees.

Retail businesses are the most likely to have less than 10 employees (89%), and those within the accommodation sector are the most likely to be sole traders (27%). Businesses in the wholesale sector are the most likely to have 25-49 employees (21%).

Table 1.5 Organization profile, by size and sector

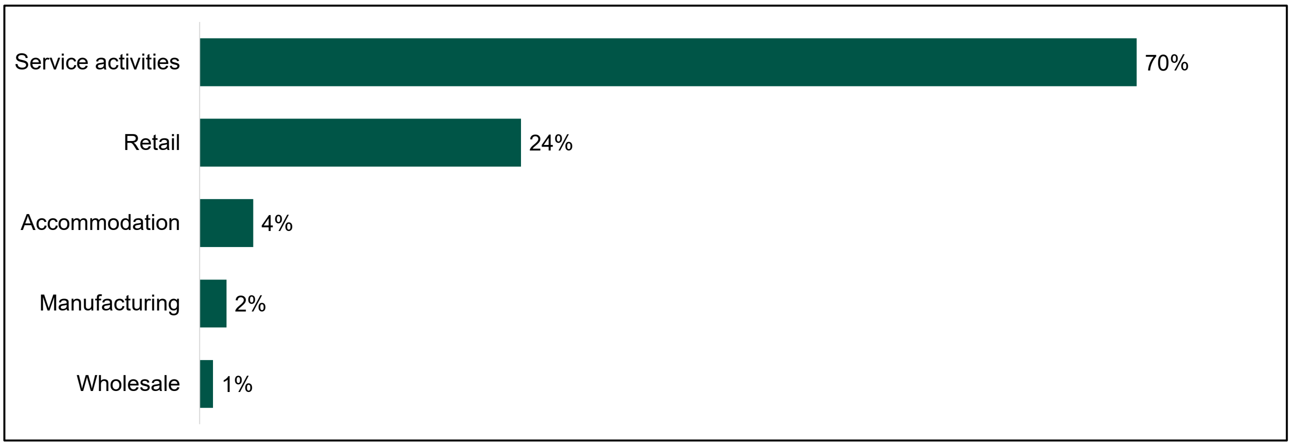
Size of the organisation	Total %	Manufact-uring %	Wholesale %	Retail %	Accom-modation %	Service activities %
NET: <10 employees	83	68*	54*	89*	80	82
Sole traders	8	9	10	9	27*	7*
2-9 employees	74	59*	44*	79	52*	75
10-24 employees	14	22*	25*	8*	13	15*
25-49 employees	3	10*	21*	3	7	3

Base: All businesses (700); Manufacturing (114), Wholesale (82), Retail (138), Accommodation (110), Service activities (256)

Sector

As shown in Figure 14.2, the majority of FBOs operate within the service activities sector (70%), and around a quarter (24%) are in the retail sector. A full list of Standard Industrial Classification (SIC) codes included in each can be found in Annex 3. Please note that, in a change from the 2019 survey, Primary Food Producers were not in scope (PFPs accounted for 16% of respondents in 2019). In 2021 the service activities sector accounted for a larger proportion of respondents (70% vs. 55% in 2019).

Figure 1.42 Sector

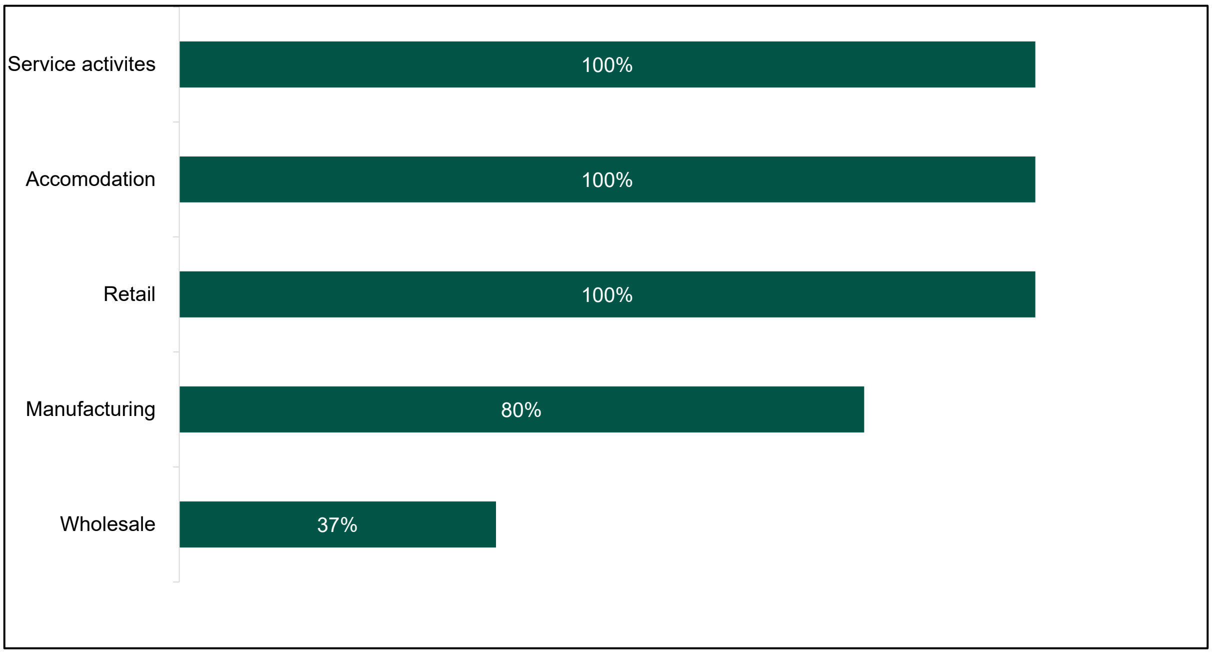


Base: All businesses (700)

Whether businesses sell directly to the public

As shown in Figure 14.3, all businesses surveyed in the service activities, accommodation and retail sectors sold food or drink products directly to the public. Businesses in the manufacturing and wholesale sectors were less likely to do so (80% and 37% respectively).

Figure 1.43 Whether businesses sell food or drink products directly to the public

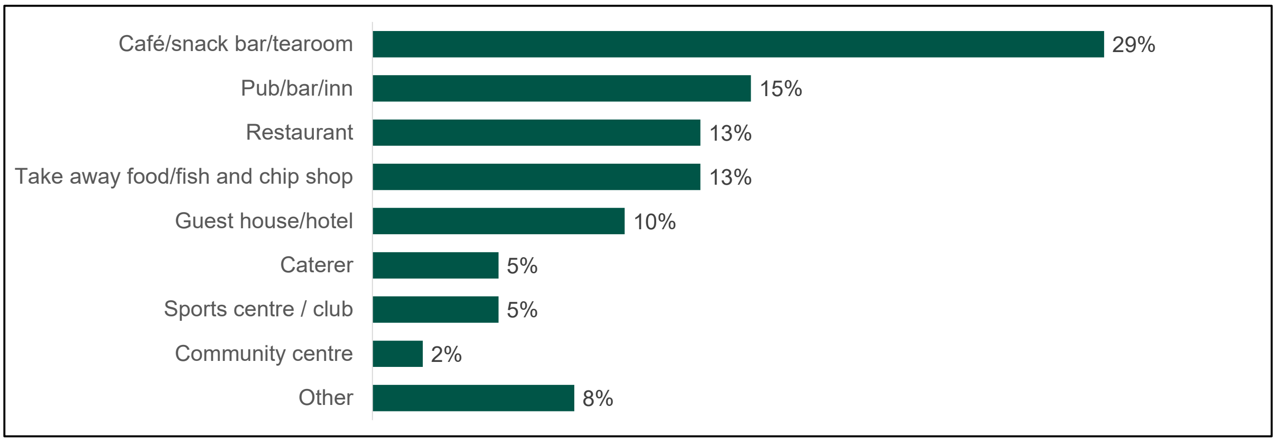


Base: All businesses (700)

Types of FBO (accommodation/ food and beverage services)

Respondents within the accommodation or service activities sector were asked how they would best describe the sort of business that they work for or own. Just under a third describe themselves as a café, snack bar or tearoom (29%), while 15% describe themselves as a pub, bar or inn and 13% describe themselves as a restaurant or takeaway food/ fish and chip shop, as shown in Figure 14.4.

Figure 1.44 Description of restaurant or catering business (accommodation/ service activities)



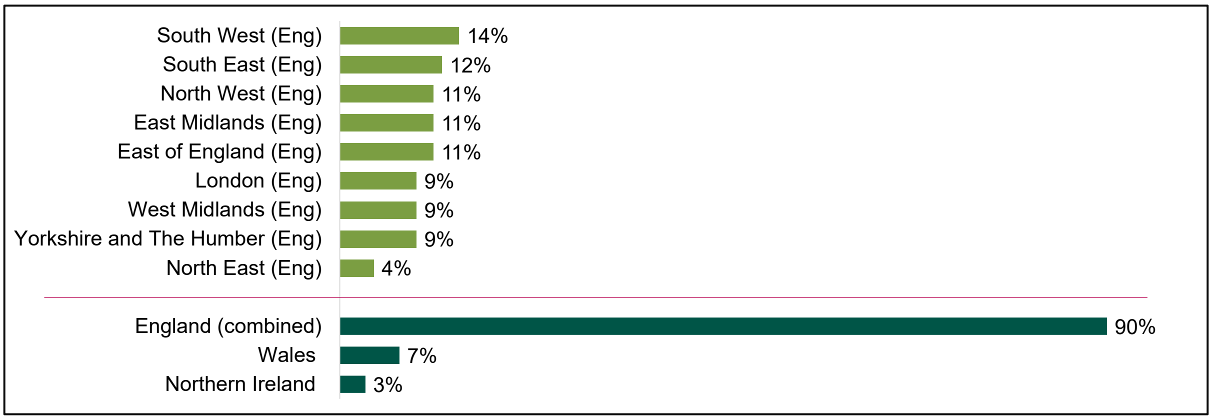
Base: Accommodation or service activities (366)

Geographic location

Most businesses are based within England (90%), spread relatively evenly by region, with the exception of the North East (4%). Overall, 7% of businesses are based in Wales and 3% in Northern Ireland.

As previously mentioned, this reflects the intentional weighting of survey data to be representative by country. The raw number of interviews achieved by country can be found in Annex 2.

Figure 1.45 Area of the UK in which FBOs are based

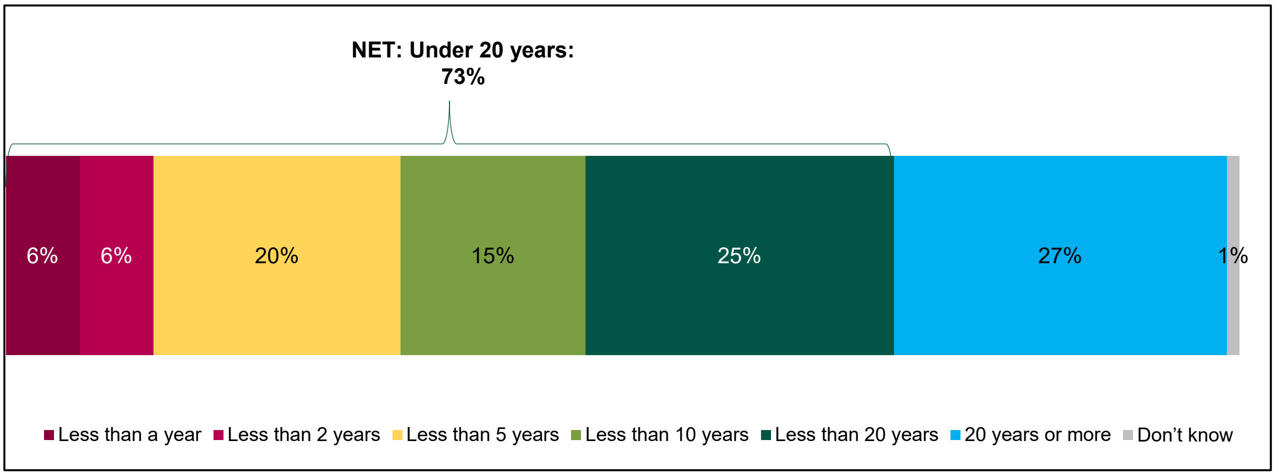


Base: All businesses (700).

Years established

Most FBOs have been trading for under 20 years (73%), with a total of 6% trading less than a year. Those with 25-49 employees are the most likely to have been trading 20 years or more (40%) closely followed by those with 10-24 employees (38%). Those in the manufacturing, wholesale and retail sectors were also more likely to have been trading for over 20 years (47%, 42% and 37% respectively).

Figure 1.46 Length of trading history



Base: All businesses (700).

Legal status

When asked for the legal status of their company, 44% of businesses reported that they were a ‘private limited company, limited by shares (LTD)’, reflecting an increase from 31% of businesses in the 2019 survey. In 2021, 29% reported their legal status was ‘sole trader’ and 11% said their legal status was a ‘partnership’. As shown in Table 14.2, both businesses with 25-49 employees and 10-24 employees were the most likely to class themselves as private limited companies (56%), while sole traders were the least likely to (23%).

Table 1.6 Legal status of the organisation by organization size

Legal status of the organisation	Total %	<10 employees %	Sole Traders %	2-9 employees %	10-24 employees %	25-49 employees %
Private limited company, limited by shares (LTD.)	44	42*	23*	44	56*	56*
Sole trader	29	33*	54*	30	10*	2*
Partnership	11	12*	4	13*	7	5
Charity / not for profit	4	3	12*	2*	5	8*
Community interest company (CIC)	1	1	0	2	1	0
Public limited company (PLC)	1	1	0	1	1	<0.5
Private Unlimited company	1	1	0	1	1	3*
Limited liability partnership	1	<0.5	0	<0.5	2	5*
Co-operative	<0.5	0*	0	0*	3*	0
Private company limited by guarantee	<0.5	0*	0	0	0	5*
Other	3	2	0	3	6*	0
Don't know	5	4*	1	4	8*	15*

Base: All businesses (700); <10 employees (436), Sole Traders (59), 2-9 employees (377), 10-24 employees (179), 25-49 employees (85)

Packaging and food preparation

Businesses were asked to describe the way that food and drink products were distributed and sold by their establishment. The majority (67%) of businesses sell food and drink as a meal, takeaway or otherwise packaged at point of sale. Around four in ten (42%) businesses sell food and drinks pre-packaged, received from manufacturer / not made on premises. Around a quarter (27%) of businesses produce and sell (unpackaged) on premises (crops and livestock etc) and a similar proportion (25%) package food on premises to be sold to other businesses or customers.

Businesses in the accommodation and service activities sector are the most likely to sell or distribute their food through meals and takeaways (82% and 81% respectively), and those in wholesale are the least likely to (12%). Rather, businesses in the wholesale sector are more likely to distribute their products pre-packaged (74%).

Table 1.7 Ways in which food and drink products are distributed or sold by establishments by sector.

Ways in which food and drink are distributed and sold	Total	Manufacturing	Wholesale	Retail	Accommodation	Service activities
Sold as a meal, take-away, or otherwise packaged at point of sale	67	33*	12*	28*	82*	81*
Pre-packaged, received from manufacturer/not made on premises	42	23*	74*	67*	24*	35*

Ways in which food and drink are distributed and sold	**Total**	**Manufacturing**	**Wholesale**	**Retail**	**Accommodation**	**Service activities**
Produced and sold (unpackaged) on premises (crops, livestock etc)	27	50*	12*	29	29	26
Packaged on premises to be sold to other businesses or customers	25	72*	35	46*	5*	18*
Other	<0.5	1	1	1	0	<0.5

Base: All businesses (700); Manufacturing (114), Wholesale (82), Retail (138), Accommodation (110), Service activities (256)

Businesses that sell food or drink directly to the public typically do so as a meal or a takeaway (68%), while 42% sell food or drink pre-packaged. Those that don't sell to the public directly most commonly package their products on premises to be sold to other businesses (56%), or sell it pre-packaged by the manufacturer (54%).

15. Annex 2: Sample breakdown

Table 15.1 details the number and proportion of achieved (unweighted) number of interviews by sector, size, country and FHRS rating. It also details the weighted profile of these respondents.

Table 1.8 Number of achieved interviews (unweighted and weighted)

Category	Achieved interview number	Unweighted sample %	Weighted number	Weighted Sample
Manufacturing	114	16%	12	2%
Wholesale	82	12%	5	1%
Retail	138	20%	165	24%
Accommodation	110	16%	31	4%
Service activities	256	37%	487	70%
<10 employees	436	62%	579	83%
10-24 employees	179	26%	97	14%
25-49 employees	85	12%	24	3%
England	505	72%	631	90%
Northern Ireland	85	12%	23	3%
Wales	110	16%	46	7%
0-2	45	6%	26	4%
3	73	10%	54	8%
4	166	24%	115	16%
5	288	41%	397	57%
Awaiting inspection/ number rating	128	18%	108	15%

Base: All businesses (700)

16. Annex 3: Standard Industrial Classifications

The list below details Standard Industrial Classifications (SIC 2007) in scope for the survey.

Business in the manufacturing sector:

Processing and preserving of meat and production of meat products

10.11 Processing and preserving of meat

10.12 Processing and preserving of poultry meat

10.13 Production of meat and poultry meat products

Processing and preserving of fish, crustaceans and molluscs

10.20 Processing and preserving of fish, crustaceans and molluscs

Processing and preserving of fruit and vegetables

10.31 Processing and preserving of potatoes

10.32 Manufacture of fruit and vegetable juice

10.39 Other processing and preserving of fruit and vegetables

Manufacture of vegetable and animal oils and fats

10.41 Manufacture of oils and fats

10.42 Manufacture of margarine and similar edible fats

Manufacture of dairy products

10.51 Operation of dairies and cheese making

10.51/1 Liquid milk and cream production

10.51/2 Butter and cheese production

10.51/9 Manufacture of milk products (other than liquid milk and cream, butter, cheese)

1052 Manufacture of ice cream

Manufacture of grain mill products, starches and starch products

10.61 Manufacture of grain mill products

10.61/1 Grain milling

10.61/2 Manufacture of breakfast cereals and cereals-based foods

10.62 Manufacture of starches and starch products

Manufacture of bakery and farinaceous products

1071 Manufacture of bread; manufacture of fresh pastry goods and cakes

1072 Manufacture of rusks and biscuits; manufacture of preserved pastry goods and cakes

1073 Manufacture of macaroni, noodles, couscous and similar farinaceous products

Manufacture of other food products

10.81 Manufacture of sugar

10.82 Manufacture of cocoa, chocolate and sugar confectionery

10.82/1 Manufacture of cocoa, and chocolate confectionary

10.82/2 Manufacture of sugar confectionery

10.83 Processing of tea and coffee

10.83/1 Tea processing

10.83/2 Production of coffee and coffee substitutes

10.84 Manufacture of condiments and seasonings

10.85 Manufacture of prepared meals and dishes

10.86 Manufacture of homogenised food preparations and dietetic food

10.89 Manufacture of other food products n.e.c.

Manufacture of prepared animal feeds

10.91 Manufacture of prepared feeds for farm animals

10.92 Manufacture of prepared pet foods

Manufacture of beverages

11.01 Distilling, rectifying and blending of spirits

11.02 Manufacture of wine from grape

11.03 Manufacture of cider and other fruit wines

11.04 Manufacture of other non-distilled fermented beverages

11.05 Manufacture of beer

11.06 Manufacture of malt

11.07 Manufacture of soft drinks; production of mineral waters and other bottled waters

Businesses in the wholesale sector:

Wholesale on a fee or contract basis

46.11 Agents involved in the sale of agricultural raw materials, live animals, textile raw materials and semi-finished goods

46.17 Agents involved in the sale of food, beverages and tobacco

Wholesale of agricultural raw materials and live animals

46.21 Wholesale of grain, unmanufactured tobacco, seeds and animal feeds

46.23 Wholesale of live animals

Wholesale of food, beverages and tobacco

46.31 Wholesale of fruit and vegetables

46.32 Wholesale of meat and meat products

46.33 Wholesale of dairy products, eggs and edible oils and fats

46.34 Wholesale of beverages

46.34/1 Wholesale of fruit and vegetable juices, mineral waters and soft drinks

46.34/2 Wholesale of wine, beer, spirits and other alcoholic beverages

46.36 Wholesale of sugar and chocolate and sugar confectionery

46.37 Wholesale of coffee, tea, cocoa and spices

46.38 Wholesale of other food, including fish, crustaceans and molluscs

46.39 Non-specialised wholesale of food, beverages and tobacco

Businesses in the retail sector:

Retail sale in non-specialist stores

47.11 Retail sale in non-specialist stores with food, beverages or tobacco predominating

Retail sale of food, beverages and tobacco in specialised stores

47.21 Retail sale of fruit and vegetables in specialised stores

47.22 Retail sale of meat and meat products in specialised stores

47.23 Retail sale of fish, crustaceans and molluscs in specialised stores

47.24 Retail sale of bread, cakes, flour confectionery and sugar confectionery in specialised stores

47.25 Retail sale of beverages in specialised stores

47.29 Other retail sale of food in specialised stores

Retail sale of other goods in specialist stores

47.76 Retail sale of flowers, plants, seeds, fertilisers, pet animals and pet food in specialist stores

Retail sale via stalls and markets

47.81 Retail sale via stalls and markets of food, beverages and tobacco products

Businesses in the accommodation sector:

Accommodation

55.10 Hotels and similar accommodation

55.20 Holiday and other short stay accommodation

55.20/1 Holiday centres and villages

55.20/2 Youth hostels

55.20/9 Other holiday and other short-stay accommodation (not including holiday centres and villages or youth hostels)

55.30 Camping grounds, recreational vehicle parks and trailer parks

55.90 Other accommodation

Businesses in the service activities sector:

Food and beverage service activities

56.10 Restaurants and mobile food service activities

56.10/1 Licensed restaurants

56.10/2 Unlicensed restaurants and cafes

56.10/3 Take-away food shops and mobile food stands

Event catering and other food service activities

56.21 Event catering activities

56.29 Other food service activities

Beverage serving activities

56.30 Beverage serving activities

56.30/1 Licensed clubs

56.30/2 Public houses and bars

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