



FSA and Official Controls

Research with food business operators

April 2020

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1. Executive summary

- The Food Standards Agency (FSA) wished to better understand how food business operators (FBOs) in the meat, wine and dairy sectors viewed the organisation and its Official Controls.
- Community Research and 2CV Research were commissioned to conduct primary research with audiences in February and March 2020. A mixed method approach was chosen to provide both in-depth insights and baseline measures:
 - 54 qualitative interviews were conducted with meat and wine FBOs.
 - 327 quantitative interviews were conducted with meat, wine and dairy FBOs.
- The research found that most FBOs were broadly positive about the FSA. Nearly three quarters rated their overall experience of working with the FSA as good or very good.
 - Wine FBOs were most positive overall; 48% said that their experience of working with the FSA was very good (compared with 23% of meat and 24% of dairy FBOs).
- While most FBOs said that they were clear about what the FSA's overall purpose was, there was less clarity about its specific remit or about how it was funded.
- When considering what they valued about the FSA, FBOs were most likely to describe it as helpful, professional and knowledgeable. They felt that it performed an important role, and they valued the advice and information it provided. FSA staff (particularly wine inspectors) were considered knowledgeable.
- The negative words most commonly used to describe the FSA were frustrating, challenging and inconsistent. FBOs felt that there was a lack of consistency when it came to the interpretation of FSA guidelines, and that advice and instructions were not always clearly communicated.
- When asked about their experiences of FSA processes, FBOs were largely satisfied.
 - No wine FBOs said that they were dissatisfied with their experiences of any of the processes, but a small minority of meat FBOs had specific criticisms, particularly in relation to enforcement.
- Although most FBOs said they found it easy to comply with FSA requirements and guidelines, a sizeable minority said that they found it difficult.

- Those that found it difficult said that the rules were overly stringent, complicated to interpret, or constantly changing.
- The majority of FBOs across all three sectors were satisfied with the FSA's communication with them overall, with wine FBOs most likely to say they were very satisfied.
 - The main criticisms were that FBOs lacked a direct point of contact at the FSA and that written communications could be difficult to comprehend.

2. Background and objectives

Project background

Food Business Operators (FBOs) in the meat, wine and dairy sectors all have a direct relationship with the Food Standards Agency (FSA) via its Official Controls (OCs), including inspections, enforcement, advice and guidance.

The FSA has anecdotal evidence on the views of these FBOs regarding the FSA and its OCs, but wished to build a firmer basis of evidence on FBOs' views in these three sectors. This insight would be used to improve relationships and inform future engagement with FBOs.

Project objectives

This research project aimed to investigate and explore:

- FBOs' understanding of the FSA's remit;
- FBOs' views of the FSA and its services;
- How FBOs prefer the FSA to communicate with them; and
- Barriers to compliance, and how FBOs could be supported to be more compliant.

In addition to the insight on FBO attitudes in relation to the FSA, a secondary objective was to evaluate the methods used to engage with these audiences. Previous efforts to conduct research with meat FBOs had achieved mixed results, and the FSA wished to ascertain how best to engage with different FBOs, should the research be repeated in the future.

This research aimed to provide a 'baseline' measure that could be used as a comparison with future waves of research.

3. Method

Overview

A mixed method approach was chosen as the most appropriate for this project:

- Qualitative interviews with meat and wine FBOs
- Quantitative interviews with dairy, meat and wine FBOs

Interviews took place with FBOs in England and Wales only. FBOs in Northern Ireland were not included in the research as DAERA carries out Official Controls in Northern Ireland. Fieldwork for both strands was conducted concurrently in February and March 2020. Fieldwork was finished early in response to COVID-19 developments, as it was felt that it would be inappropriate to take up FBOs' time in these circumstances.

Qualitative research

Qualitative research was chosen as the primary approach for meat and wine FBOs for the following reasons:

- The total universe for both sector types is relatively small compared to that of dairy¹ and it would therefore be challenging to achieve a robust number of interviews.
- Meat, and to a lesser extent wine, FBOs have more interactions with the FSA than dairy FBOs and therefore would be able to provide more depth of insight through qualitative interviews than would be possible in a structured quantitative survey.

A mixture of face-to-face and telephone interviews were conducted with 54 businesses in total. Initially the research aimed to achieve an equal number of face-to-face as telephone interviews, as it was felt that moderators would gain additional insight from seeing the sites in context. However, in practice, interviews with meat FBOs tended not to take place on site and so this in situ experience rarely occurred. Furthermore logistical difficulties, coupled with severe flooding during the fieldwork period, meant that it did not prove possible to achieve as many face-to-face interviews (15 compared to 39 telephone interviews).

These interviews followed a semi-structured discussion guide which allowed participants to provide detailed feedback, while focussing on specific themes. Participants were also asked a number of quantitative style questions that could be used to supplement the quantitative data (please see below). The discussion guide can be found in the Appendix of this report.

¹ There are 876 meat FBOs and 572 vineyards and wineries (plus 1700 warehouses / traders) compared to 8597 dairy FBOs (figures for England / Wales only).

A financial incentive was given to all FBOs who took part to encourage participation and remunerate them for their time.

Quantitative research

As discussed above, there are many more dairy FBOs in England and Wales, and therefore it was possible to achieve a robust number of quantitative interviews with this audience.

Quantitative interviews were also conducted with some meat and wine FBOs. Although the qualitative interviews were required to provide the depth of insight required, it was felt that it would be useful to have some quantitative measure from the research across all three sectors that could be used as a baseline. The final questionnaire can be found in the Appendix.

Sample

Target quotas were set to ensure that there was a good spread of types of business across the overall sample, and that it was broadly reflective (not representative) of the wider universe across the three business sectors. However, given the limited sample available, and other challenges of engaging with these audiences, these targets were not strictly adhered to; rather it was felt more important to achieve a robust sample size overall. The following table shows the final breakdown of the sample:

Data tables on the businesses sampled

Overall

Type of FBO interviewed	Qual	Quant	Total
Meat	38	55	93
Wine	16	72	88
Dairy	N/A	200	200
Total	54	327	381

Meat

Region	Qual	Quant	Total
England	36	49	85
Wales	2	6	8
Total	38	55	93

Business Type	Qual	Quant	Total
Cutting plant	19	51	70
Slaughterhouse	25	16	41

Compliance type	Qual	Quant	Total
Good	17	32	49
Satisfactory	19	20	39
Improvement / urgent improvement necessary	2	0	2

Wine

Region	Qual	Quant	Total
England	15	67	82
Wales	1	5	6

Business Type	13	35	82
Vineyard and winery	13	33	82
Warehouse / wholesale	2	4	6

Business size	Qual	Quant	Total
Medium / Large	1	6	7
Small (under 10 hectares)	13	62	75

Dairy

Region	Quant
England	152
Wales	48

Visit Frequency	Quant
6 months	6
2 years	24
10 years	170

Unfortunately, it did not prove possible to secure sufficient sample from wine warehouses to include a large enough number to reflect the total universe.

Please note that the total number of interviews does not always tally with the numbers in the subgroups or the base sizes given in the quantitative charts. There are a number of reasons for this:

- One of the qualitative interviews was a misrecruit but still had useful feedback to provide on the FSA.

- Not all qualitative participants answered all of the quantitative questions.
- Data was not provided on all FBOs (for example compliance rating).
- Some FBOs were both slaughterhouses and cutting plants.

All potential qualitative participants were screened for eligibility using the recruitment criteria described above (the screening questionnaire can be found in the appendix of this report) and the quantitative respondents were allocated to target quotas based on markers provided in the sample database provided. Interviews were conducted with the business owner at smaller businesses, and with the director, technical director or site manager at larger businesses.

Data analysis and reporting

All qualitative interviews were transcribed in full in order to provide verbatim quotes. Framework analysis was used to interpret and analyse the data. Moderator notes from each interview were entered into an analysis grid structured to mirror the discussion guide flow. This allowed identification of key themes, and filtering of interviews by sector in order to identify the recurrence and variance of findings across and between FBOs. Upon completion of fieldwork, the full team of researchers met to enable collaborative analysis and interpretation of the themes.

All of the questions from the quantitative data set have been charted in this report. Where significantly significant differences have been noted between sub-groups, these have been highlighted.

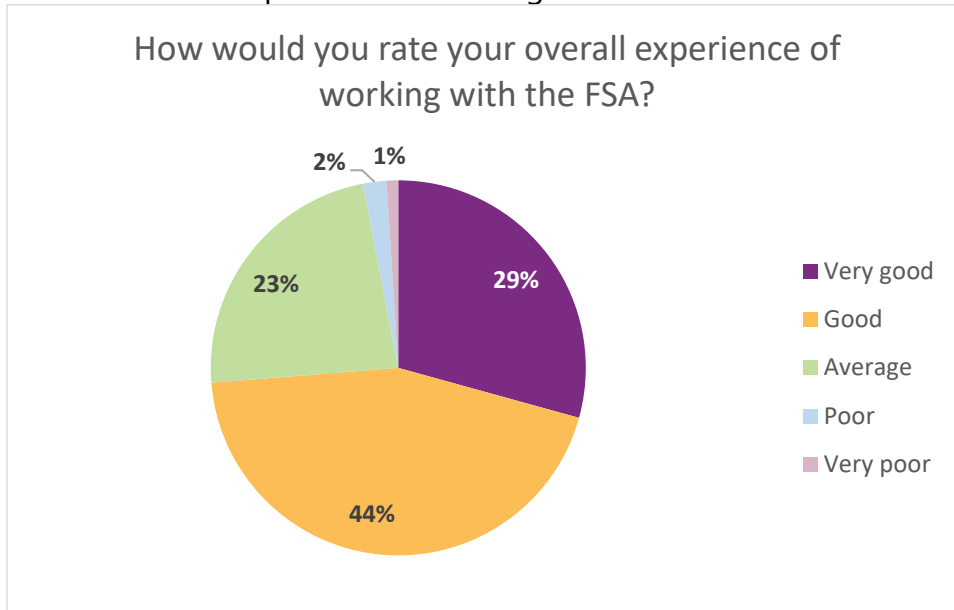
The research focusses on the qualitative findings, with the quantitative data providing an indication of the strength of feeling.

4. Main findings

Overall views of the FSA

FBOs in both the qualitative and quantitative research were largely positive about their overall experiences of working with the FSA. The vast majority rated their experience as very good (29%) or good (44%), with a quarter (23%) saying it was average. Only 2% said it was poor and 1% that it was very poor.

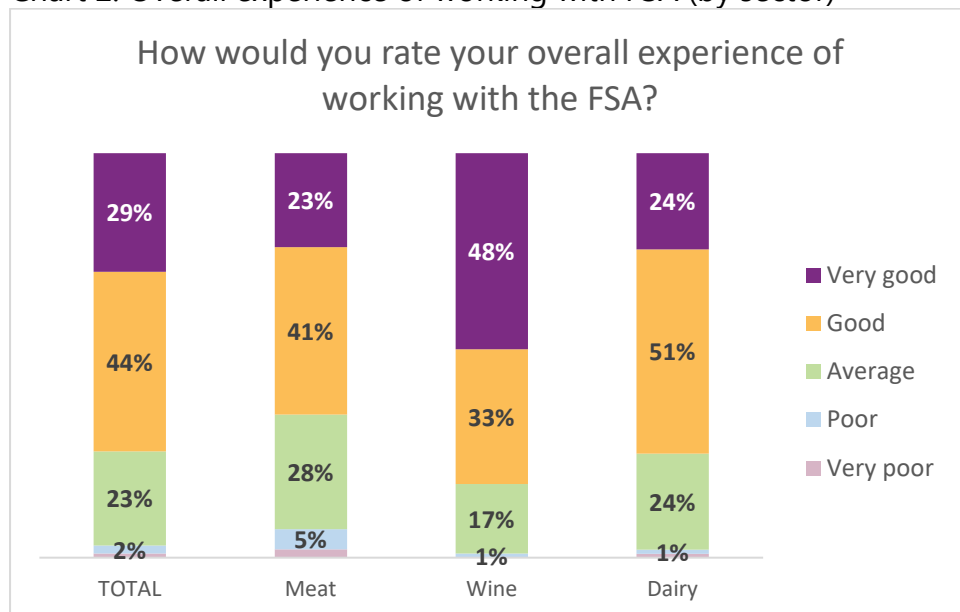
Chart 1: Overall experience of working with FSA



Base: all FBOs (qual and quant) = 381

When looking at different types of FBOs, wine FBOs are much more likely to rate their experience of working with the FSA as 'very good' – 48% (compared to 23% of meat and 24% of dairy FBOs). These figures reflect what was seen in the qualitative interviews, where wine FBOs were generally very positive about their experiences. By contrast, although many meat FBOs said they had good experiences of working with the FSA, their feedback tended to be less effusive (and for a small minority was negative).

Chart 2: Overall experience of working with FSA (by sector)



Base: all FBOs (qual and quant) = 381, Meat=93, Wine=87, Dairy=200

FBOs were asked if their views had shifted over time; by and large they had not. Three quarters overall said that their views had stayed the same. However this dropped to 58% amongst meat FBOs, 25% of whom said it had got better and 16% of whom said their views had got worse. This was also the case in the qualitative interviews; for most FBOs their relationship with the FSA had remained constant, but some had felt it had improved.

"I do think it has got better, it used to be a lot, lot worse. When I first came into it, if they wanted to shut you down for any reason, that's it, there would be no 'Can we talk about this, can we get something sorted so the plant can work?' and, you know, 'What's the issue and how are we going to get around this, and how are we going to make it achievable?' But now it is better in that respect."
Meat FBO

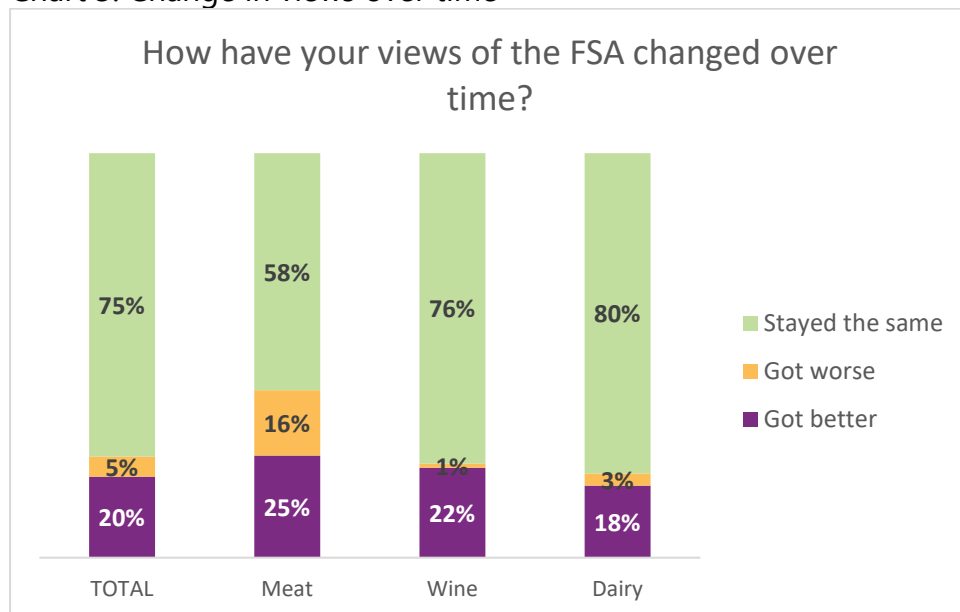
"I'd say it's softened, to be fair. I understand the bureaucracy better now, having been in the industry for nearly 12 years now. And the fact we have that easy relationship. Communication is better, it didn't used to be that good, it used to be all forms in the post, and you didn't get the nudges you get now. They are much more efficient than they used to be."
Wine FBO

A minority of meat FBOs in the qualitative research felt that things had deteriorated in recent years.

"There's more checks they have than there used to be."
Meat FBO

"This last year, this last 18 months it seems to have got worse. They're very strong on animal welfare now."
Meat FBO

Chart 3: Change in views over time

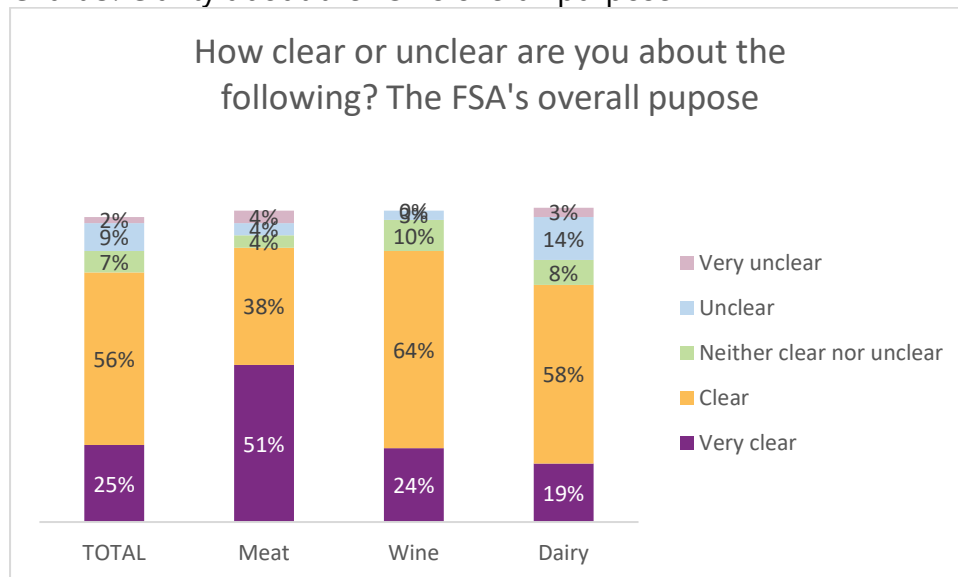


Base: all FBOs (quant) = 327, Meat=55, Wine=72, Dairy=200

In the qualitative research, participants were asked to sum up their experiences of working with the FSA in three words. The word cloud below illustrates the different words that were used – the size of the word reflects how frequently it came up. Overall, the word cloud reflects the feedback that qualitative participants provided – although many found the FSA to be helpful, professional, efficient and knowledgeable, it was also seen to be frustrating, challenging and inconsistent. Reasons for these views are explored in the following sections which explore what FBOs value about the FSA and the criticisms they have of the organisation.

Most FBOs felt that they understood what the FSA was there to do. 25% said they were very clear and 56% said they were clear about the FSA’s overall purpose. Meat FBOs were most likely to say they were very clear (51% compared to 24% of wine and 19% of dairy), which likely reflects the higher frequency of contact these businesses have.

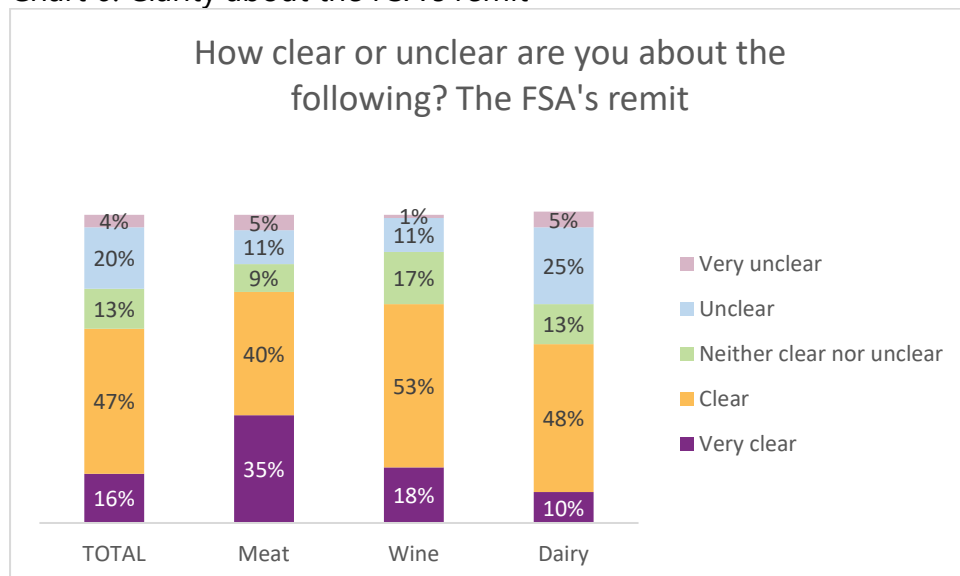
Chart 5: Clarity about the FSA’s overall purpose



Base: all FBOs (quant) = 327, Meat=55, Wine=72, Dairy=200

Similarly, most FBOs said that they understood the FSA’s remit – 16% said they were very clear and 47% said they were clear. Again, clarity about the FSA’s remit was highest amongst meat FBOs. However, a sizeable minority said that they were not clear about the FSA’s remit – 20% said they were unclear and 4% said they were very unclear. This lack of clarity rose to 25% and 5% amongst dairy FBOs.

Chart 6: Clarity about the FSA's remit



Base: all FBOs (quant) = 327, Meat=55, Wine=72, Dairy=200

The quantitative results mirror what was found in the qualitative interviews. Most meat and wine FBOs claimed to understand what the FSA is there to do, but tended to focus on the aspects of the FSA's role that were most relevant to their own businesses. Most participants focussed primarily on the FSA's role as enforcer, rather than setting standards or providing guidance or advice.

"In terms of what the FSA do on a wider basis for the wine industry, I'm not entirely sure other than to keep a check on us all and check we're not selling petrol or something like that." Wine FBO

"To sort of police such establishments as ours for food safety reasons, which I think is quite right." Meat FBO

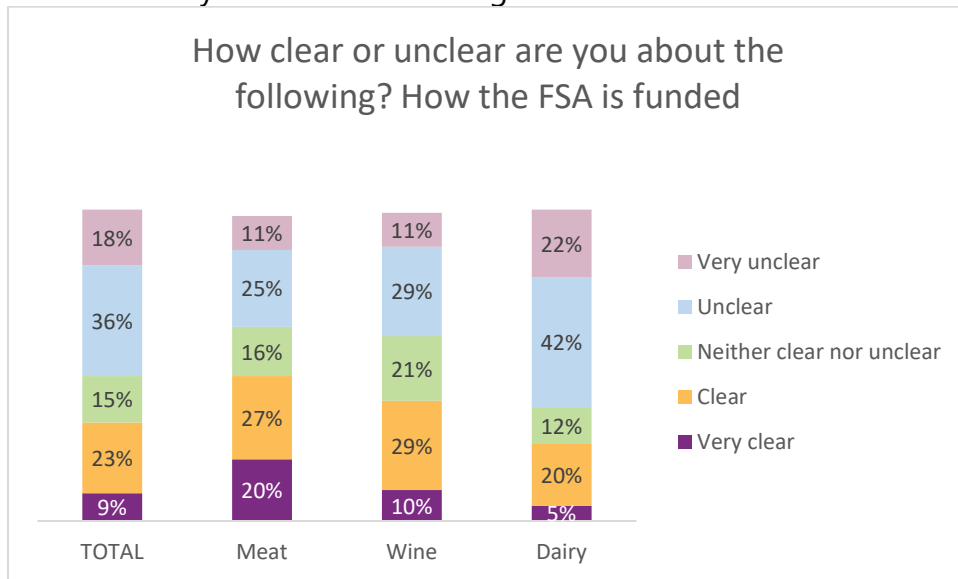
"Effectively they're the food police, aren't they?" Wine FBO

Many meat FBOs felt that the FSA's role to protect consumers was very much in line with their own business objectives.

"My whole reputation is based on sound quality and meat that the customer wants to eat. The FSA are the same... We're both trying to achieve the same thing, it's not a conflict." Meat FBO

FBOs across all three sectors said they were unclear about how the FSA was funded. Only 9% said they were very clear (rising to 20% amongst meat FBOs), and 23% were clear. By contrast 36% said they were unclear, and 18% said they were very unclear.

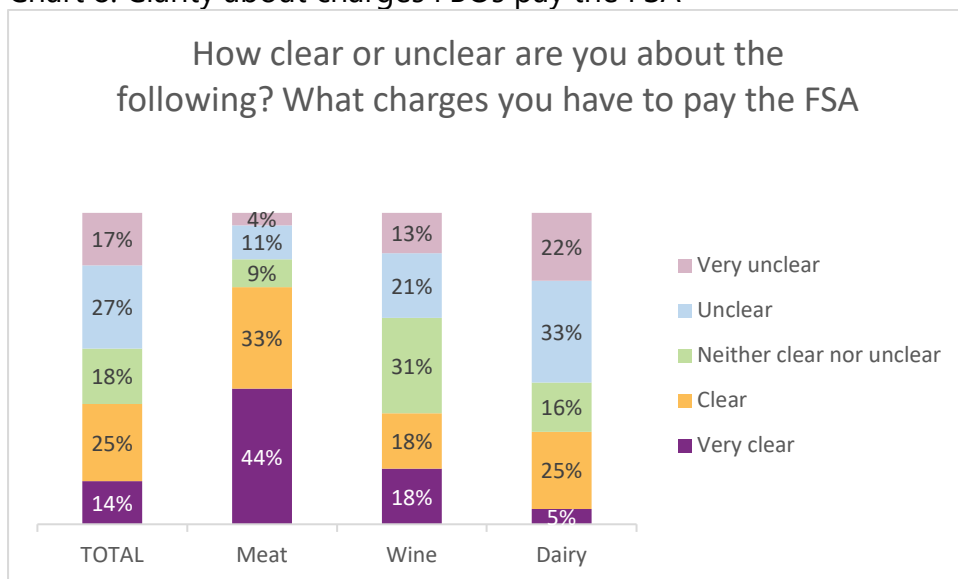
Chart 7: Clarity about FSA's funding



Base: all FBOs (quant) = 327, Meat=55, Wine=72, Dairy=200

FBOs were similarly unclear about the charges they had to pay the FSA themselves, although meat FBOs claimed to be much clearer about this than wine and dairy FBOs (44% said they were very clear compared to 18% and 5% respectively).

Chart 8: Clarity about charges FBOs pay the FSA



Base: all FBOs (quant) = 327, Meat=55, Wine=72, Dairy=200

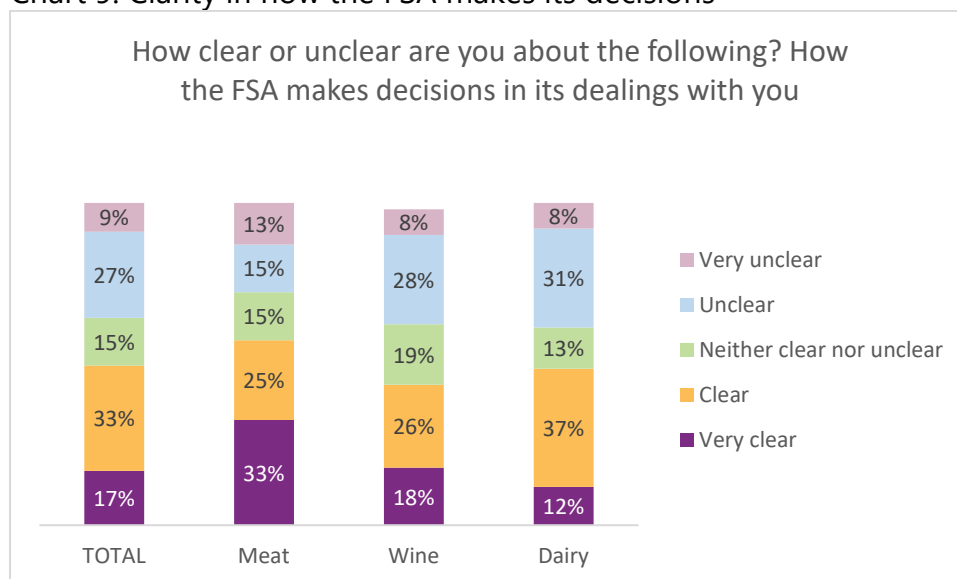
Again, FBOs' understanding of FSA funding and charges was mirrored in the qualitative interviews, where meat FBOs had far greater understanding than wine FBOs. There were conflicting views as to whether the charges levied on meat FBOs were proportionate.

"They charge us extreme amounts of money to provide a service to ourselves."
Meat FBO

"I don't think it should be government funded. I suppose you could say that about anything then, we're getting managed by them so we should really pay for it". Meat FBO

When asked how clear they were about how the FSA made decisions in its dealings with them, half of FBOs said they were clear (17% very clear and 33% clear). Meat FBOs were more likely to say they were very clear about this. As discussed below, some FBOs spontaneously criticised the FSA in the qualitative interviews for a perceived lack of clarity about its decision making process.

Chart 9: Clarity in how the FSA makes its decisions



Base: all FBOs (quant) = 327, Meat=55, Wine=72, Dairy=200

What FBOs value about the FSA

Across the three sectors, when thinking about what aspects of the FSA were valued, there were some common themes.

In the qualitative research, both meat and wine FBOs said they valued the FSA's **very existence**. They saw the organisation as an important safeguard, protecting both consumers and the industry's reputation. They felt that the FSA stopped 'bad' businesses from getting away with poor practice and as a result, helped to maintain consumer confidence. The FSA's role in keeping an eye on other businesses was seen as really important. This feeling came through across all different sizes and types of FBOs.

"The way I look at it is...if they weren't around, what would be going on in the industry?" Meat FBO

"I don't believe that everybody in the meat or food industry, left to their own devices, would do it properly." Meat FBO

"As somebody that is trying to do the job properly, it's important for my business that they do keep an eye on it because there is a lot of people... you know there are financial gains through cutting corners...I would much rather do a good job and fly straight. But I can only do that as long as everyone else has to do it as well." Meat FBO

"I think as the industry as a whole, I think it's very good to have a body that overlooks us all and makes sure that we're meeting correct standards and not endangering anyone by making dangerous wine... it's quite easy to open a business and start selling stuff to the public surprisingly, it's not that difficult and the FSA are probably the only real backstop to that at the moment and that's invaluable really." Wine FBO

Appreciation of the FSA's existence also came through strongly in the quantitative research. When asked what three things the FSA did well in its dealings with the business, 20% of respondents spontaneously said 'maintains/enforces standards' and a further 13% said 'keeps standards high'. Dairy FBOs were particularly likely to think that the FSA did these things well, at 26% and 17% respectively.

A fifth (20%) of FBOs in the quantitative research said that the FSA gave **good / clear information**, rising to over a third (35%) of wine FBOs. This also came through in the qualitative research, where many meat and wine FBOs valued the advice, guidance and support the FSA provided.

"Telling [us] about what they know about the legislation and what's required." Wine FBO

"They keep us informed about public health issues." Dairy FBO

Many of the meat FBOs in the qualitative research said that they particularly appreciated the roles that were performed by **FSA staff**. They found that the work the FSA inspectors and vets did was helpful and liked the fact that there were people there making sure that things were being done properly and that regulations were being complied with. It gave these FBOs peace of mind to have someone double checking.

"I see them as an outside set of eyes, additional to what I see on a daily basis. When they come in, they guide me. In some respects, although I pay into the system, they are a bit of a free audit for me to pick up the things I miss daily because I see it daily. It's nice to have a different set of eyes." Meat FBO

"It gives you that confidence in your food." Meat FBO

Wine FBOs in the qualitative research were extremely positive about the FSA staff that they had worked with. They felt that the wine inspectors were experienced and knowledgeable and that their support and advice was really useful. This was particularly the case with those wine FBOs who were new to the industry.

"They are consistently supportive, they are very straightforward, and to be honest I actually trust them." Wine FBO

There was a sense amongst many of the wine FBOs that the wine inspectors really did seem to know and care about wine, which really helped to cement a positive relationship. Furthermore, they were able to build this relationship as they saw the same individual over a number of years.

"Unlike other people that I deal with, I feel they really understand the business of grape-growing, they understand it's farming, they understand the challenge." Wine FBO

Unlike with some of the meat FBOs, where there was not always a sense of partnership with the FSA (see below), most wine FBOs felt that they were working with the FSA, with a common set of goals.

"I think they are there to do a good job rather than there to build empires or create problems for people. If I get a note from the Wine Standards Board saying there is going to be a change in something, I know they've thought about it, they've researched it, they have a sense of what it's going to be, and they are telling us because they think it is going to be useful to us, not because they are trying to do something for the sake of mucking us about." Wine FBO

Criticisms of the FSA

Reflecting the largely positive overall experience most FBOs said they had of working with the FSA, in the quantitative research there was minimal negative feedback. The main areas where respondents suggested the FSA could improve were around providing better / clearer information and advice (16%) and better communication (15%).

Qualitatively meat FBOs in particular had similar criticisms. Some felt that that there was a **lack of consistency** when it came to FSA advice or instructions. They felt that guidelines were interpreted differently by different individuals, and as a result, they were sometimes told conflicting things. For example, an FBO might receive different audit feedback from one year to the next, even if they had not made any changes. There were even instances where the same individual gave different advice on different occasions. Some FBOs had been led to make investments (for example, meat mincing equipment, knife sterilisers) based on such advice, which turned out to be unnecessary.

"They're just constantly changing their minds, or we'll do it one way one week, and the next week they've changed the legislation so you've got to it a different way... They just interpret the rules and regulations differently. You can read one thing and I can read the same thing, but you'll think differently to what I'll think. So, there isn't a consistency between them all to get it all right." Meat FBO

"There's grey areas but I think they leave a lot of it to the people who are coming into see us so they have to make a judgement but the problem is when they're making a judgement and then you've got another guy turning up next time making a different judgement." Meat FBOs

Another criticism that came through in the qualitative research amongst meat FBOs was a perception that FSA and its staff **lacked pragmatism** and or flexibility when it came to the standards it imposed on businesses. It was felt that more should be done to take into account different factors such as business sizes and ways of working. This was particularly the case for smaller FBOs who felt that it was unfair to expect them to adhere to the same rules as larger FBOs – this could be costly and use up precious staff resource. Some simply felt that the FSA staff could be petty in their rulings and felt that greater flexibility could be shown in terms of understanding and lenience for minor infringements.

"They don't want to listen to why you don't do it like something, or why it's done differently. They just want to say, 'You should do it like this and get on with it' basically." Meat FBO

"But emphasising everything, you know little petty things. We had an inspection the other day, a spot inspection. Fine, there was a couple of things wrong, that happens with everything. There was a pair of wellingtons in the canteen, that was one of the issues they came up with, which I think is very, very minor and shouldn't be written down." Meat FBO

"Sometimes what I would describe as a completely minor or insignificant non-conformant state, they seem to escalate a bit too much in my opinion... it really is an electric law. Definitely 'computer says no'." Meat FBO

Communication was an issue for many FBOs. For some this was down to language barriers – meat FBOs reported that many OVs did not have English as a first language, and on occasion this resulted in a lack of clarity amongst FBOs as to what they were being asked to do. Some FBOs felt that the FSA guidance had too much jargon to make it easily comprehensible.

"They might have passed the English test that they set them but when you struggle to speak to them and what should take about ten seconds to convey takes ten minutes." Meat FBO

"Sometimes in terms of audits and things like that, it can be a bit technical. And a little bit unclear but that's also exacerbated by quite often that the employers sending a lot of foreign nationals." Meat FBO

A small minority of meat FBOs had a more combative attitude towards the FSA. They felt that FSA inspectors were actively **looking to find fault** and questioned whether some might have an agenda. They did not feel that they were working in partnership towards a common goal, with the FSA helping them to achieve their business

objectives; rather, they were trying to conduct their business activities *in spite of* the FSA's involvement.

"Our current vet, he just reads the textbook and that's what you have to do, there's no varying from that. It's always our fault, it's never their fault and they make it hard work." Meat FBO

"This one guy just seemed to have it in for us on this particular visit... It was like they had an agenda." Meat FBO

While wine FBOs were largely very positive about their experiences of working with the FSA, some did criticise it for being overly **bureaucratic**. While many of them saw it as part and parcel of dealing with a regulator, it was still frustrating at times, and they expressed a desire for more streamlining to reduce this.

"The more forms you've got to fill out, the more bureaucracy, the more time you're wasting." Wine FBO

Experiences of processes

In both the qualitative and quantitative research, FBOs were asked whether they had experienced certain processes the FSA delivered, and if so, what their experiences of these had been. Please note that many of these processes had been experienced by very few FBOs and so there is limited feedback on the reasons for the scores given.

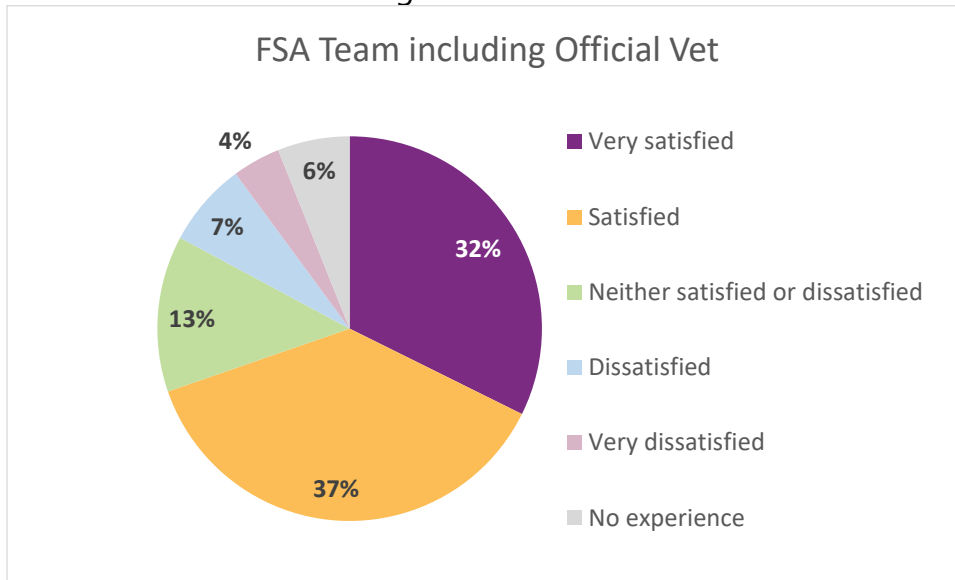
Meat

94% of meat FBOs had experience of the **FSA team including the OV** and the majority were satisfied with the experience. In the qualitative research, participants were either very positive or very negative; this was often based on whether the FBO felt that the FSA team was working in partnership with the FBOs or whether there was more of a 'us vs them' mentality. Individual relationships were key drivers of FBO attitudes to the FSA in the qualitative research generally. Those who were positive about the FSA tended to also feel that the individuals they were working with were experienced, pragmatic and flexible in their approach. They also tended to have a longer term ongoing relationship with one or a small number of individuals. By contrast, those who were more negative about the FSA tended to say that the FSA teams they had worked with were inexperienced or 'jobsworths' with poor communication skills. Where people had dealt mainly with different contract workers (as opposed to a core FSA team), they also tended to be less satisfied by their experiences. Some FBOs who had had experiences with a number of different FSA staff really noticed the contrast between them and felt it could impact on their businesses. When there were lots of changes in staff it also meant additional work for them.

"If they're inexperienced, you don't get that time back; you don't get anything off the FSA, but yet your business can suffer quite dramatically." Meat FBO

“You can waste half a day of your management’s time finding relevant information for somebody who’s new to site. It’s a bit like a new employee every week, but they’re not actually working for us. So, you still have to provide all that information, but that can be wasting senior management time... That is quite frustrating.” Meat FBO

Chart 10: FSA team including official vet



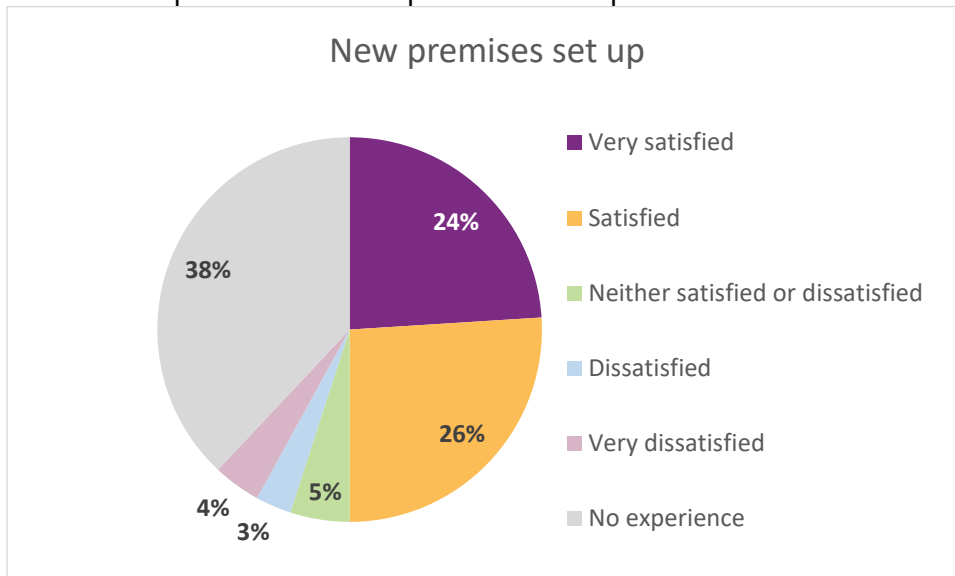
Base: All meat FBOs (qual and quant) = 88

Around a third of FBOs had experienced **new premises set up**. Most were satisfied with the experience, finding it a fairly straightforward process.

“When we first started working with them at the beginning, they were amazing... I thought, these guys want us to do well and we want to succeed together.” Meat FBO

A minority questioned the charges for this process.

Chart 11: Experience of new premises set up

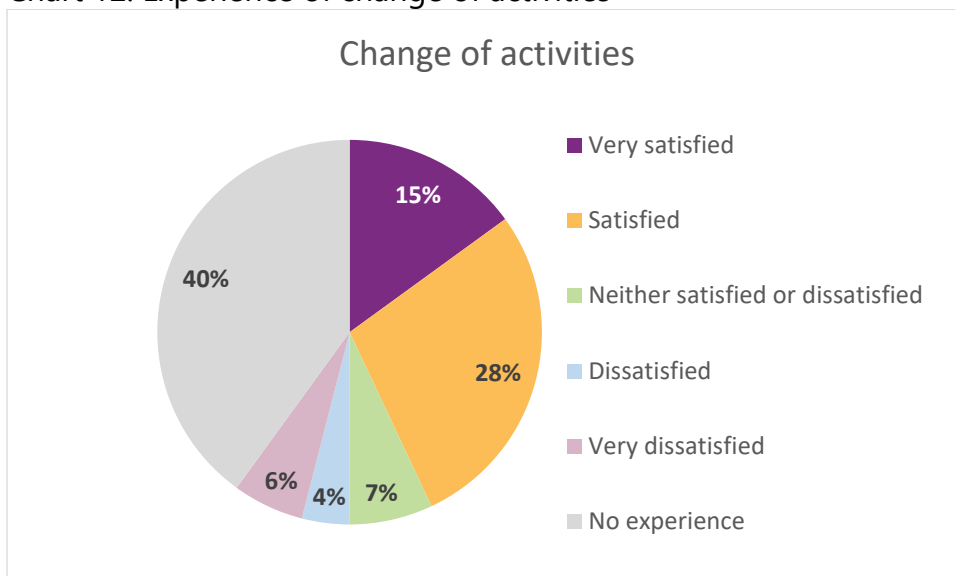


Base: All meat FBOs (qual and quant) = 78

60% of meat FBOs had experienced a **change of activities**. Again, most were positive about the experience, finding it generally straightforward. The minority who were more negative about the experience said that they found it expensive and / or overly time consuming.

"You get it done, but they like to make it quite complicated, and when you're asking for the paperwork to sort it all out, they're not very forthcoming with help to fill the paperwork in." Meat FBO

Chart 12: Experience of change of activities

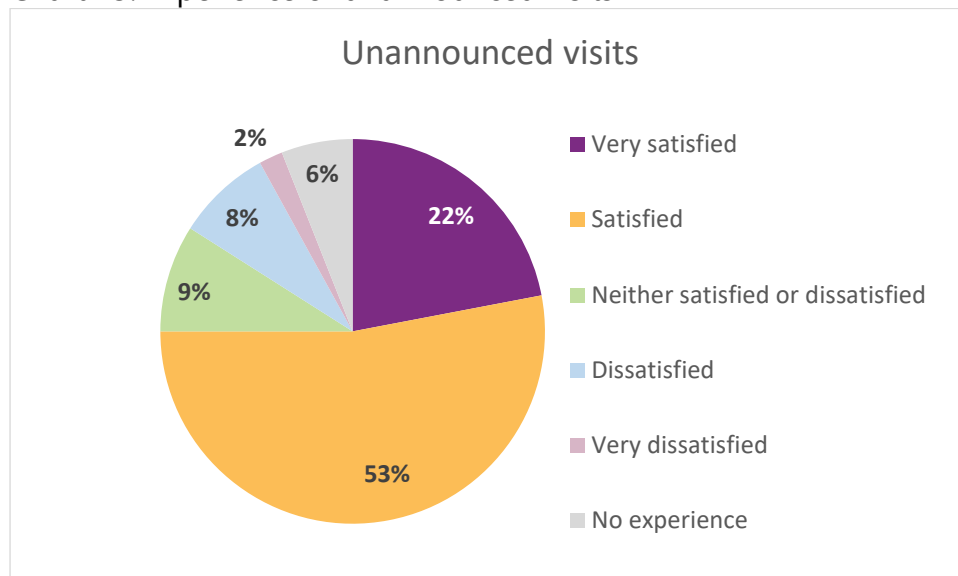


Base: All meat FBOs (qual and quant) = 81

Nearly all (94%) of meat FBOs had experienced **unannounced visits**. The vast majority were satisfied with the experience, and some actively welcomed them as a way to keep them on their toes. They felt that the inspectors were helpful and knowledgeable and gave good advice – and for some, the main criticism was that the visits were not long enough. FBOs were more positive about unannounced visits than other FSA processes, seeing them as a necessary and inevitable part of doing business.

“You just accept that as a business in our field. You’re under the microscope and you have to expect it.” Meat FBO

Chart 13: Experience of unannounced visits



Base: All meat FBOs (qual and quant) = 90

Around two thirds (65%) of meat FBOs had experienced **enforcement**, and feedback on this process was more varied. Again, some felt that their experience of enforcement was inconsistent and that it depended on the individual.

“It depends so much on which vet you get. There’s such a big difference. Of course it depends on individual vets really. Some enforce it very strongly and others are quite mild about these things.” Meat FBO

“I do like the fact that the team of the FSA we’ve got with us, have dialogue before giving an enforcement notice if something needs to be said, and something we can work out before an enforcement notice comes, and that is the best way forward for a working practice. We have had experiences where there’s been no dialogue, and it’s just been a letter through the post, and that’s what it is.” Meat FBO

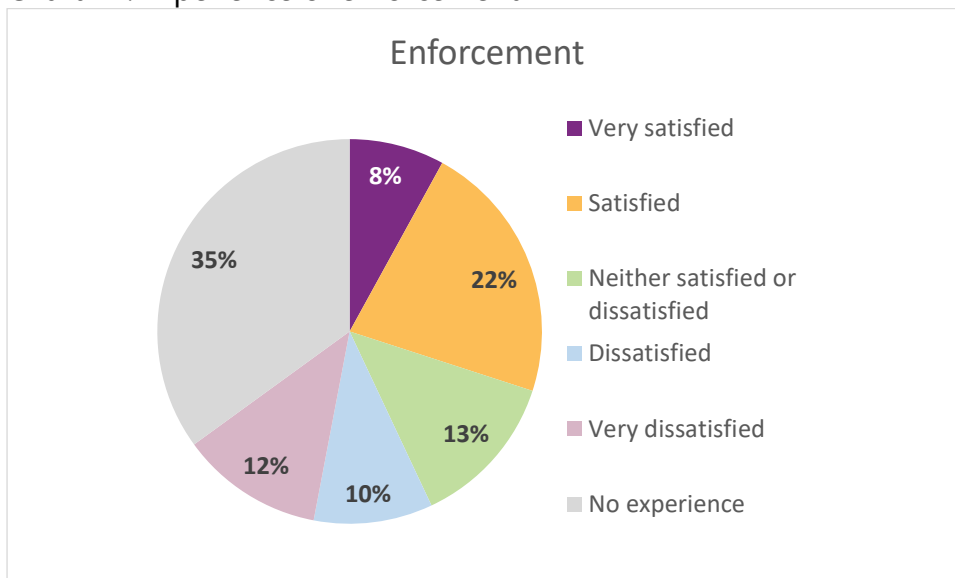
Whilst most were broadly satisfied with the experience, a few had very negative experiences. Their criticisms centred around:

- A sense of injustice. Many felt that the infringements were petty and that inspectors were actively looking to find fault. Some also felt that the timescales for compliance were unrealistic and / or unfair.
- The process itself being unnecessarily time consuming and costly. For example, if they had to go to court, this was expensive for all involved, and FBOs felt that it could be avoided by them being told what to do and a timeframe within which to do it.
- The fact that the approach was formal i.e. FBOs received a letter, as opposed to collaborative. FBOs felt it would be preferable if they were to receive advice on site, rather than waiting to receive written feedback.

"They just jumped on that 'right we'll ban them, we'll stop them'. They don't give it no thought or interviewed us or anything, and I think that's wrong." Meat FBO

"As soon as it goes into email it is official, whereas it would be so much better to be able to discuss and maybe turn that issue around, instead of it being made into an issue." Meat FBO

Chart 14: Experience of enforcement



Base: All meat FBOs (qual and quant) = 86

86% of meat FBOs have experienced **inspections including for welfare**. The vast majority were satisfied with their experiences. Again, this was reflected in the qualitative interviews.

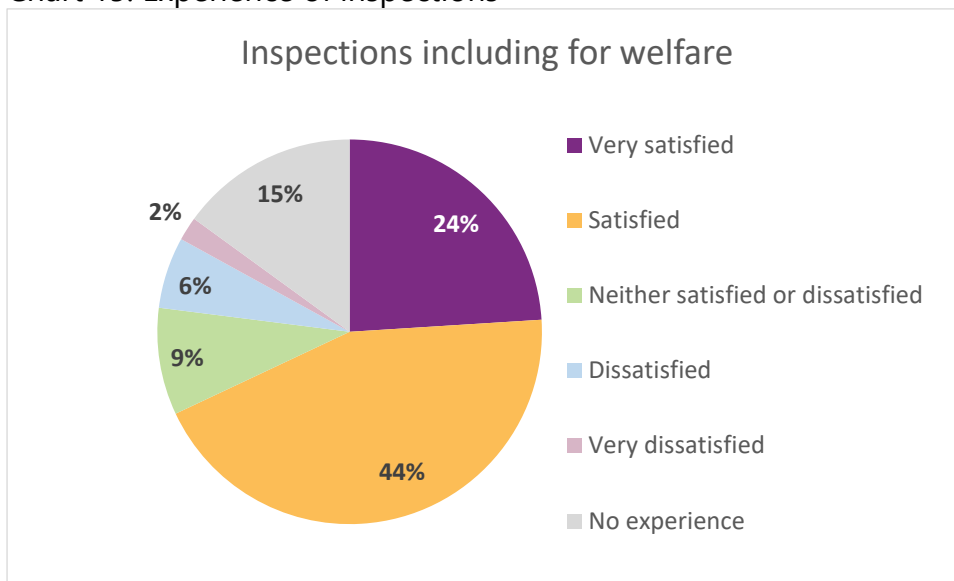
"I've always found them to be reasonable when they're asked me to do things... a lot of the stuff they've asked me to do I've completely agreed in doing. But there're things that I've been letting go till I was asked to do them. Because,

let's face it, at the end of the day I'm here to make money. And so I would have let them carry on, had they not asked me to do them." Meat FBO

There was some criticism that occasionally animal welfare took precedence over everything else.

"We are very keen...on welfare of animals, but the welfare side seems pushed towards the animals and far from the operator. They would rather the operator got damaged than the cattle, the stock, if you know what I mean." Meat FBO

Chart 15: Experience of inspections

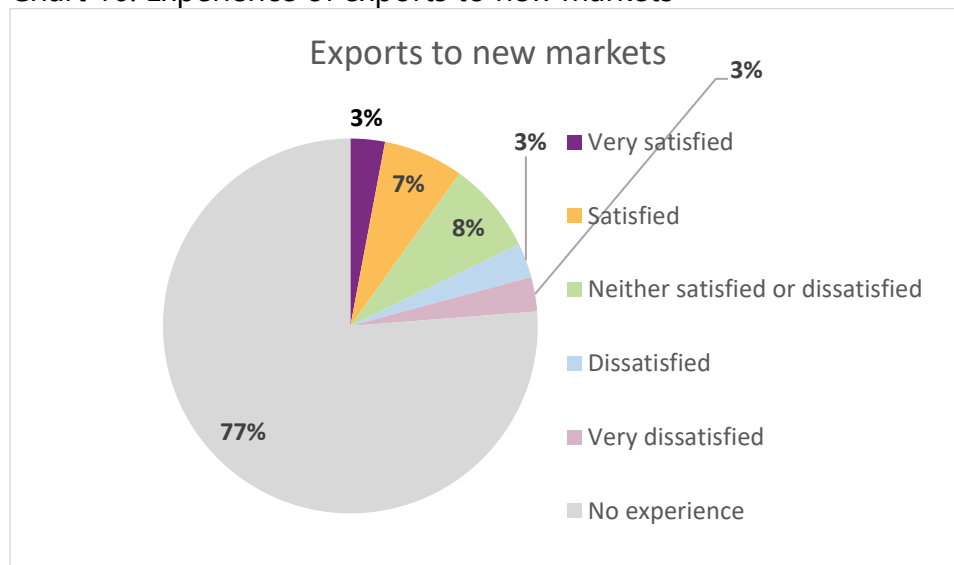


Base: All meat FBOs (qual and quant) = 88

Only 23% of meat FBOS had experienced **exports to new markets**. Those that had were generally satisfied with the process. Within the qualitative sample only a handful of FBOs had experienced the process and the one individual who had been unsatisfied had found it overly complex a process.

"I asked them about what paperwork I needed and all this and then I asked for some support regarding filling it in. Basically, I just got passed from pillar to post and no one knew... So, I went through my OV as well and various other contacts and I basically ended up ringing everyone that I had a number for and I got absolutely nowhere." Meat FBO

Chart 16: Experience of exports to new markets



Base: All meat FBOs (qual and quant) = 88

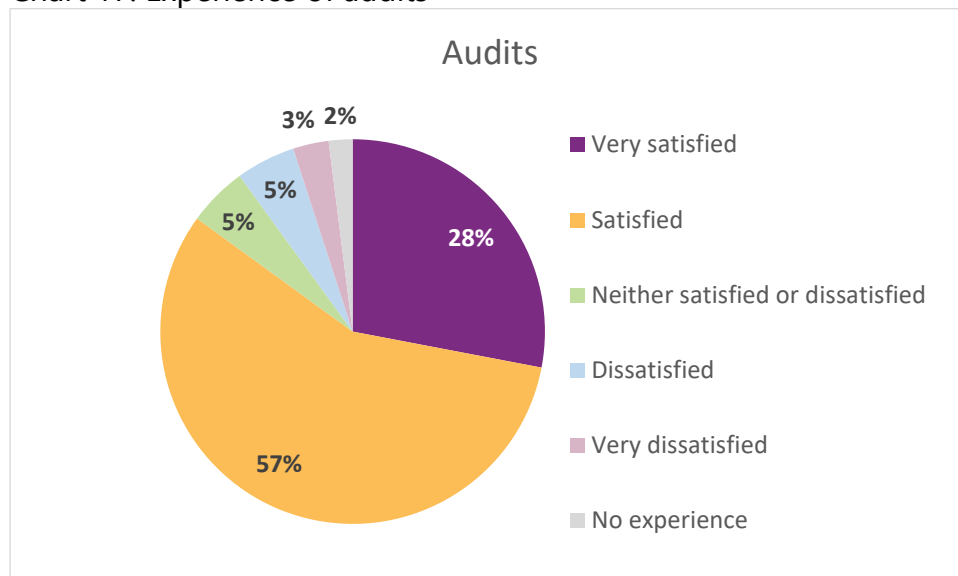
The vast majority (98%) of meat FBOs had experienced an **audit** and most were positive about this process. Qualitatively many FBOs found the audits quite a useful exercise in that it helped to keep them on their toes.

"I like the audits, because literally, you think you've got everything spot on and they always find something." Meat FBO

There was a sense amongst some FBOs that there was sometimes a lack of consistency depending on who conducted the audit.

"Sometimes, you've got the mindset thinking I've got to find things that are wrong, with that attitude. But... I've probably had auditors who have been a bit too weak, so not picked up on enough on-site when I've known there's been something wrong." Meat FBO

Chart 17: Experience of audits



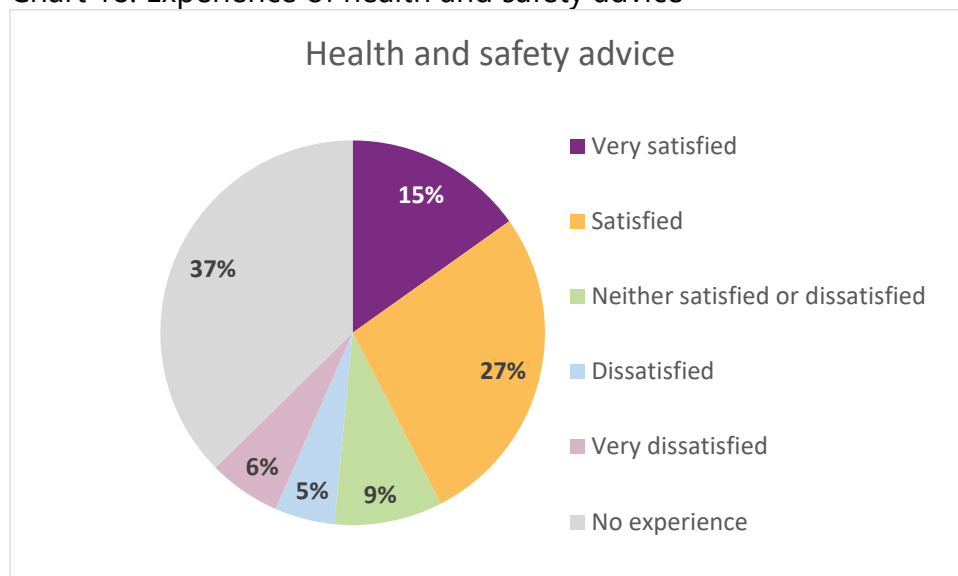
Base: All meat FBOs (qual and quant) = 88

Around two thirds (63%) of meat FBOs had experienced **health and safety advice**, and again, most had been satisfied with this. Qualitatively, only those meat FBOs with on-site FSA presence felt that they had received advice. Some FBOs would welcome the provision of more advice.

"It depends what you class as health and safety advice. If it's temperature control, guidance and things like that, then yes, we have. Very satisfied because they're very helpful." Meat FBO

"If there's anything we need to know, they're there, yes." Meat FBO

Chart 18: Experience of health and safety advice



Base: All meat FBOs (qual and quant) = 78

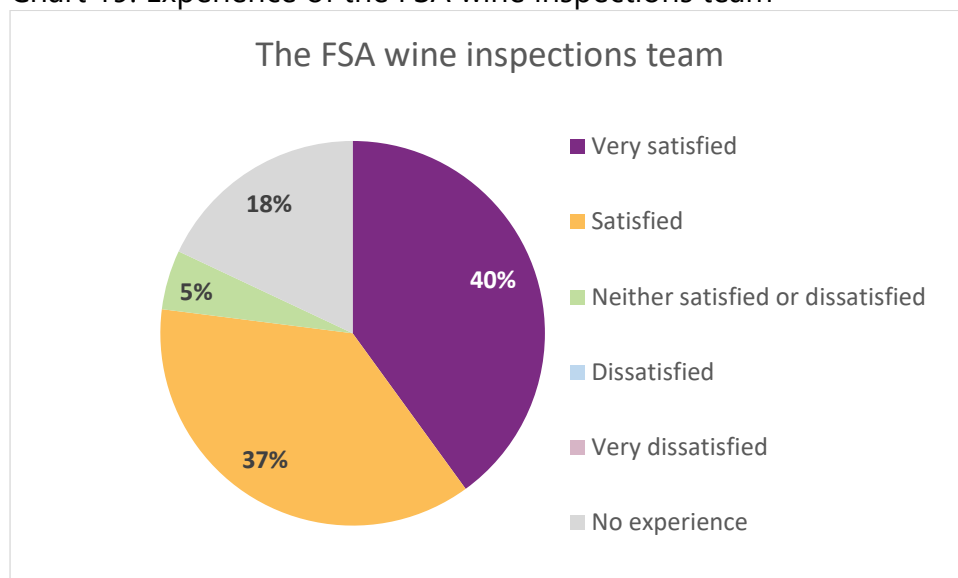
Wine

Three quarters (82%) of wine FBOs said they had experience of the **wine inspections team**, and none of those surveyed said they were dissatisfied by this process. Qualitatively, as discussed above, wine FBOs particularly felt that the FSA wine inspections team were knowledgeable and helpful, and most had built up a strong relationship. They felt that they had a good understanding of the wine industry and were pragmatic in their advice and guidance.

"If we are making mistakes, he doesn't throw the rule book at us, he just advises us that when he next comes to see us we need to have sorted it out, and we just sort it out." Wine FBO

"He doesn't put unnecessary barriers in front of us. And as I say, he tends to point you in the direction to a solution of a problem that is likely to crop up or may crop up before it becomes an issue. So he's very proactive." Wine FBO

Chart 19: Experience of the FSA wine inspections team

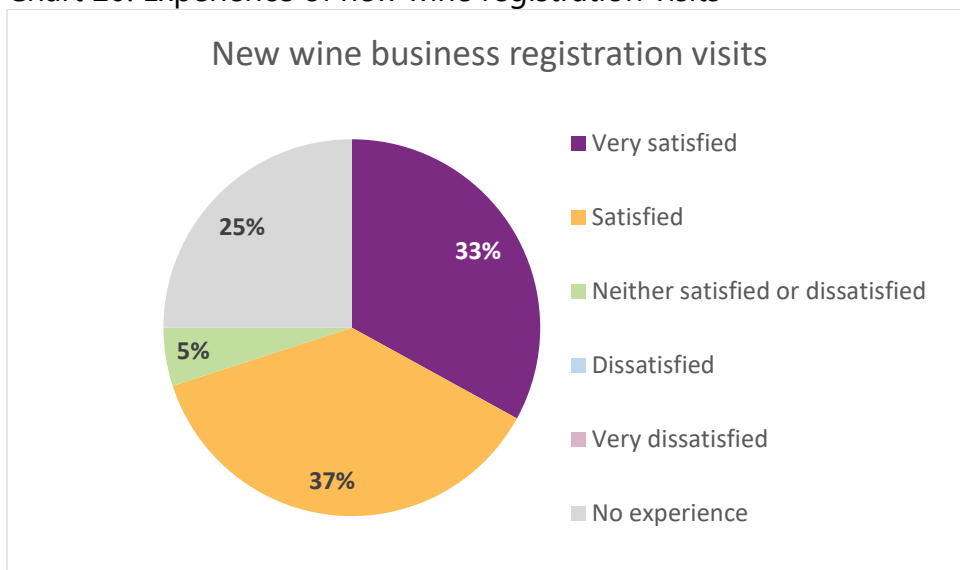


Base: All wine FBOs (qual and quant) = 82

Three quarters (75%) of wine FBOs had experienced **new wine registration visits**. Again, none of those interviewed said that they were dissatisfied with the process, which reflects what was seen in the qualitative interviews. Wine FBOs found these visits straightforward and informative.

"I thought he did a really good job of just making sure that I felt comfortable that the FSA was going to be part of our lives and part of our business. And that they would need to come in and would be checking that we were doing everything correctly. But he outlined what we needed to have in place for that, so we started off on a good basis and that he managed expectations of what the FSA would need from us in the future." Wine FBO

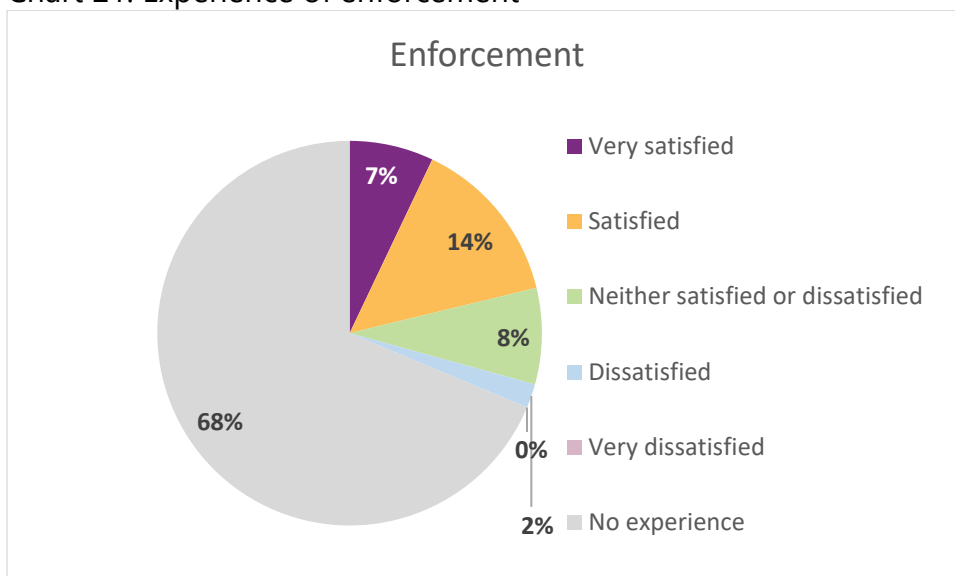
Chart 20: Experience of new wine registration visits



Base: All wine FBOs (qual and quant) = 83

Only 32% of wine FBOs had experienced **enforcement**, and most of those that had were satisfied with this. Qualitatively none of the wineries or vineyards had experienced enforcement. The one warehouse that had, had been dissatisfied with the process as they had felt that the FSA had been inflexible in its response to what they perceived as a minor labelling error.

Chart 21: Experience of enforcement



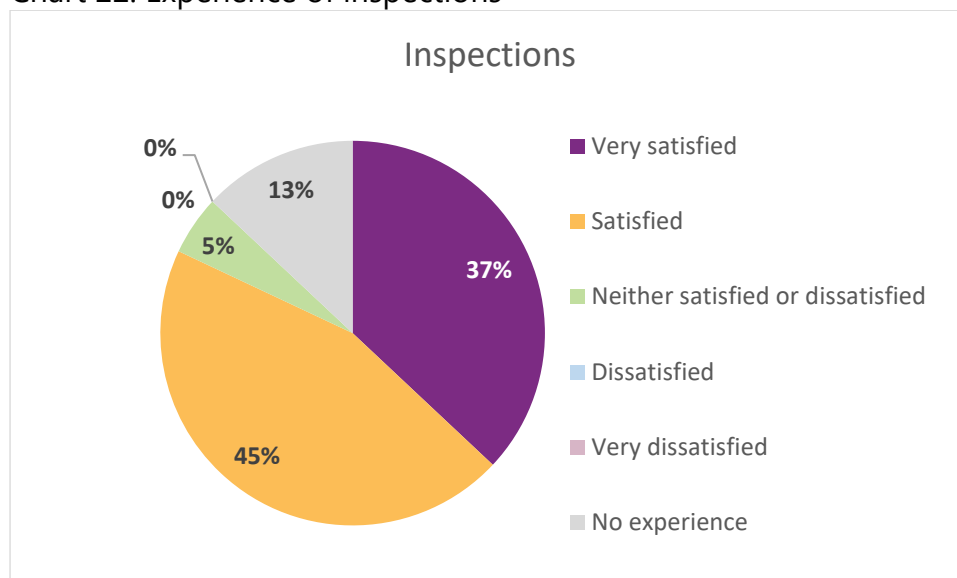
Base: All wine FBOs (qual and quant) = 84

Nearly all (87%) of wine FBOs had experienced **inspections**. Again, no respondents in the quantitative or qualitative sample said that they were dissatisfied with the process. Wine FBOs said that they were made as easy as possible for them, for example, being held at mutually convenient times and that there was good communication about the process.

"He arrived on time, turned up announced. All the normal standard communication was good. He looked at things, explained why he was looking at things. He explained as he went and it was done and dusted. It was clear."
Wine FBO

"It's a very straight forward process for us, because we're quite organised, all the information is already there, and it's very easy for us, straight forward. It's very friendly, it's sufficiently organised, at times to suit us." Wine FBO

Chart 22: Experience of inspections

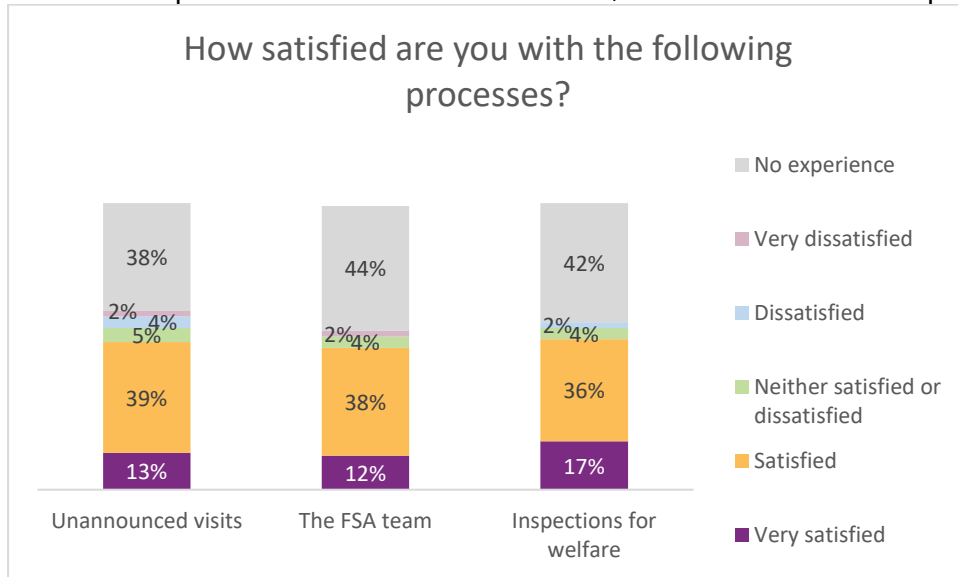


Base: All wine FBOs (qual and quant) = 84

Dairy

Dairy FBOs were most likely to have experienced unannounced visits, the FSA team and inspections for welfare, with over half having been through these processes. The vast majority of dairy FBOs were satisfied with their experiences. Feedback for dairy FBOs has been summarised, rather than pulled out separately for each process, as we do not have qualitative feedback to provide further insight into the reasons for the scores given.

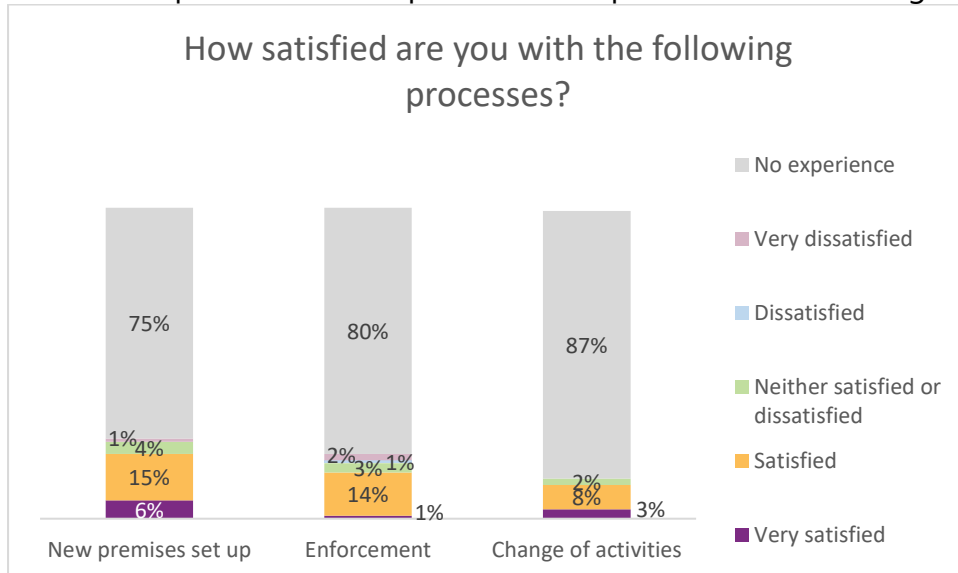
Chart 23: Experience of unannounced visits, the FSA team and inspections for welfare



Base: All dairy FBOs (quant) = 200

Far fewer dairy FBOs said they had experienced new premises set up, enforcement, change of activities, with only a quarter or less being able to rate these processes. Again, very few dairy FBOs were negative about these experiences.

Chart 24: Experience of new premises set up, enforcement, change of activities

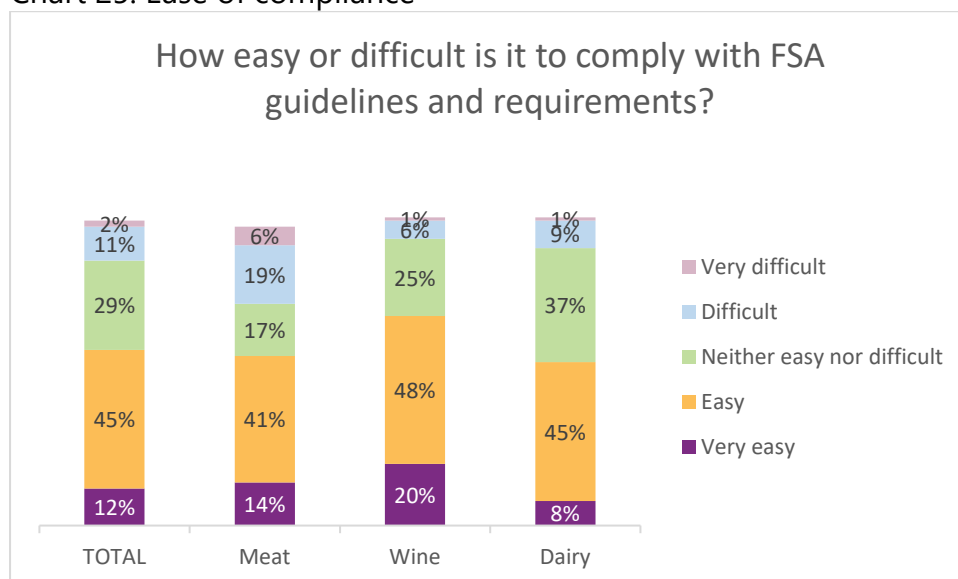


Base: All dairy FBOs (quant) = 200

Compliance

FBOs were asked how easy or difficult they found it to comply with FSA guidelines and requirements. Most respondents said they found it easy (45%) or very easy (12%), but over one in ten found it difficult, rising to a quarter of meat FBOs.

Chart 25: Ease of compliance



Base: All FBOs (qual and quant) = 381

Qualitatively, most FBOs found compliance relatively easy.

"There's nothing there too taxing to do, it's just all pretty straightforward. Keeping on top of it's okay." Meat FBO

In the quantitative research, the main reasons respondents gave for saying they found it difficult or very difficult to comply were that the rules were too stringent / impractical (47%), that it was becoming more complicated to comply (27%), and that the rules were constantly changing (27%). These barriers to compliance also came through in the qualitative research. Both meat and wine FBOs said that it could be hard to understand FSA guidelines and requirements, especially if you were new to the industry. Some also felt that there was some lack of clarity or consistency in relation to the guidance that was provided (as discussed above).

"Like any legislation, you normally have to read it two or three times before you can fully grasp what is needed." Wine FBO

"Trying to get into the industry, it's very difficult because you come across a) the instruction manual is ambiguous, and b) a lot of people don't really want to be drawn into giving you their opinion because they'll be held accountable." Meat FBO

"They've [FSA] got huge great manuals which they're all given to read, spend hours writing them all, and they're going every now and again for a little training session to learn different bits of their manuals. But we don't get anything like that. We're running a business. We're not vets, we're meat wholesalers... But they seem to think that we know everything they think we should know, but we don't." Meat FBO

Some smaller FBOs felt that it was harder for them to comply than their larger counterparts. They felt that it did not always make sense to apply to same rules to them as to the bigger operators, and that the effort and expense were disproportionate as a result.

"Sometimes you think, oh, for a small abattoir that's a bit OTT, obviously we run under the same rules as... we slaughter very few animals, we run under the same rules as the abattoirs that will slaughter thousands... a week." Meat FBO

"They have guidelines that are made generically, if you like, for all businesses. And we are a bit of a square plug going in a round hole, so some things are quite hard for us to do." Meat FBO

There were some specific instances where some meat FBOs found it harder to comply, for example when it came to installing cameras or air conditioning in slaughterhouses – for some such requirements were prohibitively expensive.

"I think one of the main issues that's bugging me at the moment is that a lot of the regulations that are being enforced are specifically around having to install close circuit television to monitor the welfare of live animals...the FSA doesn't really seem to have any grasp of the fact that there's a cost implication of that and that it could be going towards putting small abattoirs out of business." Meat FBO

Nevertheless, there is some recognition amongst some FBOs that it shouldn't be overly easy to comply with guidelines and requirements; the fact that most people don't find it very easy does not necessarily mean that it is a problem.

"It's...hard. But you have to remember you're selling food to people. So it should be." Meat FBO

FBOs who found it difficult to comply would welcome more support from the FSA to help them to be compliant, for example providing them with written or in-person help and guidance to understand complex requirements.

"Within the FSA, there should be a consultancy side of it as well, where they come in... even if they charge for it, you know, at the end of the day, if we're going to pay somebody else, if we pay the right people, meaning that they give us the right advice." Meat FBO

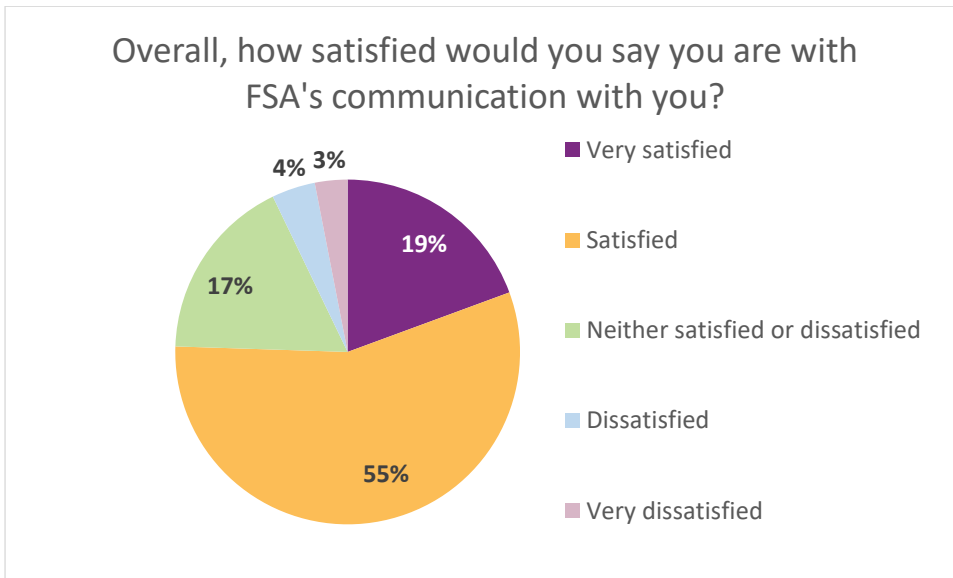
"They could advise as opposed to just order us." Meat FBO

"Work with us to solve the problem instead of constantly barking orders at you to do it with no help." Meat FBO

Communication and engagement

Most FBOs across all three sectors said they were satisfied with the FSA's communication with them overall. 55% were satisfied and 19% very satisfied; only 4% were dissatisfied, and 3% very dissatisfied.

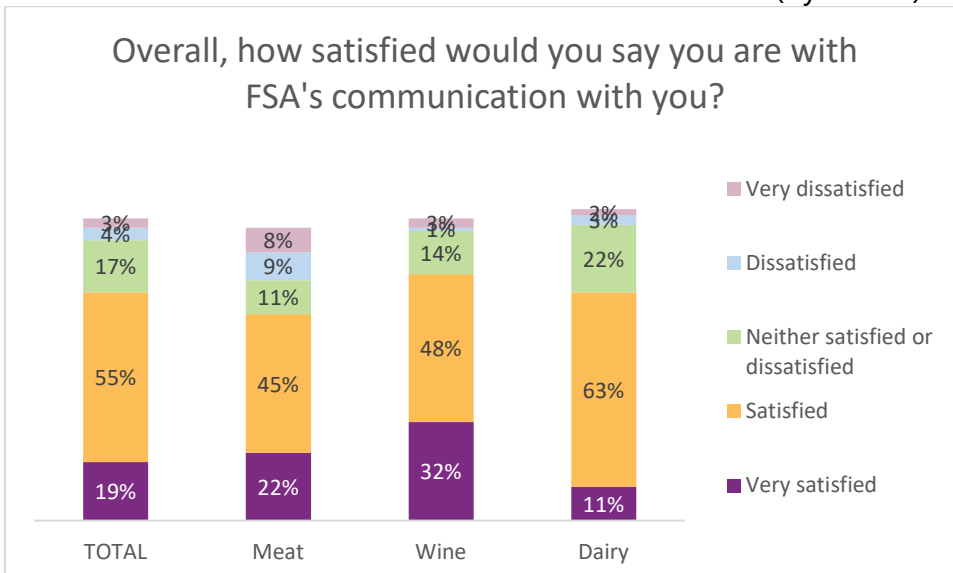
Chart 26: Overall satisfaction with FSA communications



Base: all FBOs (quant) = 327, Meat=55, Wine=72, Dairy=200

When breaking out responses by sector, there were some differences, with wine FBOs more likely to be very satisfied with the FSA's comms (32%), and dairy FBOs more likely to just be satisfied (63%). The latter may be an indication of the relatively infrequent communications received by dairy FBOs – only 10% of them had heard from the FSA in the last month, compared to 69% of meat FBOs and 22% of wine FBOs.

Chart 27: Overall satisfaction with FSA communication (by sector)

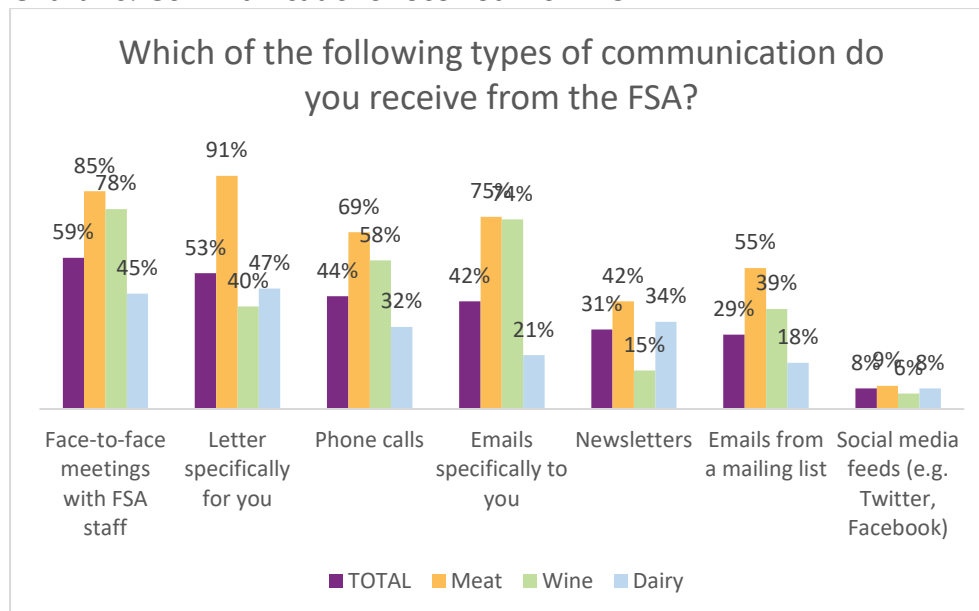


Base: all FBOs (quant) = 327, Meat=55, Wine=72, Dairy=200

The type of communications FBOs received varied by sector. Meat FBOs were most likely to say they received letters (91%), had face-to-face meetings with FSA staff

(85%), received emails (75%) or phone calls (69%). These were also the most common forms of contact for wine FBOs, although these respondents were much less likely to say they received letters (40%). Dairy FBOs were far less likely to receive any type of communication from the FSA, but the most common types were letters (47%) and face-to-face meetings (45%).

Chart 28: Communications received from FSA



Base: all FBOs (quant) = 327, Meat=55, Wine=72, Dairy=200

Respondents were asked which kinds of messages and information they valued from the FSA. The most valued type were messages about changes to regulations affecting their business (39%) followed by messages about changes to Official Controls (12%).

Qualitatively participants said that they were broadly content with the type and frequency of communications they received from the FSA. Wine FBOs in particular appreciated not being overloaded with communications. They were grateful to have a single point of contact and for the responsiveness of inspectors to their queries. Some expressly said that they did not require any more communications from the FSA, not least because they felt that they already received good comms from Wine GB and they did not want this duplicated.

"Rather than bombard me with a whole load of stuff I neither need nor care about, our Wine Standards Body chappie sends me what I need to know. If I ask him about something, he'll send me the answer about that something, and that's great." Wine FBO

Wine warehouses were more like some meat FBOs in feeling that they lacked easy access to the FSA.

"They're [the FSA] a bit faceless. And finding out who to contact is not always easy." Wine FBO

Some FBOs acknowledged that communications could be a bit 'old fashioned' and / or jargon-heavy. However, this was not problematic for most.

"Sometimes they're a bit formal, you know? And they could possibly do with a bit more text in there, putting it in layman's terms." Meat FBO

"They do write it a little more complicated than it should be. We are not the sharpest tools in the box, being butchers and slaughtermen, and they write to us as if we are sort of almost solicitors or high end office staff. Why don't they just write to us and say this is what's happening, in this way, and that's it?" Meat FBO

The FSA website was seen as being adequate by those who used it (which tended to be wine FBOs), but some felt that it could be easier to navigate.

"The FSA website is very good at giving information." Meat FBO

"I don't think it's the best website around, but it's functional." Wine FBO

"I have been looking for information and it just doesn't seem to come up when it should. I think they could have more on their website, I just never seem to be able to find what I'm looking for, forms. And I know other businesses have said that, so definitely a better website." Wine FBO

A criticism levelled by some meat FBOs was that the communication channels could be quite one-way, and that it was not always easy to contact the FSA directly. Many would appreciate a single point of contact to enable them to do this.

"I'm at the point at the moment where I need some advice from the FSA... And I don't actually know who my point of contact is. There was a time when I would have known exactly who my point of contact was. And as it stands at the moment, I haven't got a clue who they are... it's because we're seeing a different one each time." Meat FBO

Other suggestions for improvement included:

- A newsletter or bulletin board providing content on areas including updates on issues such as EU Exit, industry developments, reminders of upcoming deadlines for forms etc.
- Easy / simple overviews at the top of documents explaining what it's about, who it's relevant to, and summarising key points.

5. Conclusions

Research conclusions

- Most FBOs across all three sectors are broadly positive about their experiences of working with the FSA.
 - Wine FBOs are particularly satisfied with their experiences.
 - Meat FBOs are most likely to say they are dissatisfied, but this is still a minority view.
 - Qualitatively, it is smaller meat FBOs who are most likely to have less positive views.
- Individual relationships are key to FBO attitudes towards the FSA.
 - FBOs are most positive when they have long-standing relationships with FSA staff who they consider to be experienced, pragmatic and helpful. These FBOs feel that they and the FSA are working towards a common goal.
 - A small minority have a more antagonistic attitude towards FSA staff. These FBOs have a more 'them vs us' mentality, and can feel that they are working against the FSA.
- Most FBOs are satisfied with the different FSA processes they have experienced, with only a minority expressing dissatisfaction.
- While dairy and wine FBOs tend to find it easy to comply with FSA guidelines and requirements, some meat FBOs find it difficult – these FBOs say it can be costly and impractical to comply.
- FSA comms are seen as fit for purpose. Although there are some suggestions of improvements, there is no strong demand for significant changes.

Method evaluation

- Overall, the mixed method approach worked well for engaging these audiences in sufficient numbers and in sufficient depth.
 - Telephone interviews (as opposed to face-to-face) allowed the researchers to explore issues in detail; face-to-face interviews add an unnecessary degree of complexity and would not be recommended for future waves of research.
- Fieldwork took longer than anticipated. Some of this was due to circumstances beyond our control (for example, the flooding and COVID-19 developments), however, at least half the booked interviews needed to be rescheduled as the FBOs were not available at the allotted time. A month had

been allocated to the fieldwork; we would recommend at least six, preferably eight weeks for a similar sized future project with these audiences.

6. Recommendations

Future research

Should any future waves of research be conducted, we would recommend the following:

- Repeating one-to-one interviews for qualitative insights (these could all be conducted by telephone) and telephone interviews for the quantitative survey.
- Allowing 6-8 weeks for fieldwork.
- If time allows, staggering the quantitative and qualitative research in order to explore emerging insights coming from the first strand.
- Including a question in the survey to ascertain FBO size, in order to explore differences by business size.

