FSA Small and Micro FBO Tracking Survey 2019

Research report April 2020

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Acknowledgements

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Executive Summary

In August 2018 the Food Standards Agency (FSA) commissioned BMG Research to undertake a survey of food business operators (FBOs) with up to 49 employees across all their sites in England, Wales and Northern Ireland. The survey was conceived as an annual tracking survey with the following aims:

- To better inform insights on the UK's EU exit and engagement with small and micro FBOs
- To 'unpack' attitudes towards regulation to deepen insights and knowledge of small and micro food businesses with regards to the FSA's Regulating our Future priority
- To measure trust in the FSA and extent to which FSA is considered an excellent, accountable and modern regulator
- To explore any other issues as required.

The 2019 tracking survey was conducted in September and October 2019, and comprised 644 telephone interviews with small (10-49 employees) and micro (up to 10 employees) FBOs, including 51 interviews with newly established FBOs, those with an FHRS rating of below 3 and with establishments headed up by someone for whom English is a second language. This compares with 530 and 56 interviews respectively in 2018.

In both 2018 and 2019, FBOs in Wales and Northern Ireland were over-sampled to ensure there was a robust sample for analysis in these nations, although in 2019 the sample in Wales was further increased.

The data in both 2018 and 2019 was weighted to be representative of the micro and small FBO population across England, Wales and Northern Ireland.

The 2019 survey, while duplicating the methodology and approach and expanding geographic coverage of the 2018 survey, increases the focus on issues related to food safety and how FBOs are addressing the need to minimise customer exposure to harmful allergens and microbes.

Key findings

While competition and taxation remain major concerns to food business operators (FBOs) in 2019, at the time of the survey the UK's exit from the EU was also significant in this respect, particularly among FBOs in Northern Ireland, which reflects the extent to which businesses in Northern Ireland trade across the border with the Republic of Ireland.

In 2019 views regarding the possible impact of the UK's exit from the EU were less polarised and more mixed than they were in 2018. FBOs remain more likely to see the potential impact of the UK's departure as negative rather than positive and, again, this is more pronounced in Northern Ireland than elsewhere.

Positive views revolve around the potential consequence of people taking more UK-based holidays and sourcing UK-grown and manufactured food and drink products. Negative views reflect expectations of higher prices for products, in respect of both raw materials/ingredients and those that are ready to consume, as well as potentially fewer overseas visitors.

FBOs preparing for the UK's EU exit were still very much in the minority, as they were in 2018. Stockpiling/bulk buying and securing suppliers were the main activities, with a few FBOs sourcing more UK products. Levels of importing and exporting are low amongst FBOs but it is clear that views of the UK's EU exit are coloured by more than involvement (or not) in overseas trading. Longer supply chains that ultimately stretch to and from EU markets are a significant issue.

There is a general feeling that regulations, judiciously and fairly applied, are a benefit to FBOs, helping to maintain good standards and public safety, and ensure a level playing field. Furthermore, there are high levels of agreement that regulations are effective and reasonable.

FBOs that directly serve the public tend to hold the view that regulations add value to their product/service offers. There is a high degree of trust that all FBOs are doing what they should do with regard to food safety.

Compared with 2018 there has been significant improvement in 'traceability' i.e. businesses keeping records on where food has been obtained. This may be linked to the growing need for food businesses to provide information on potential allergens that might be contained in any food or drink products they sell or serve. However, provision of this information is less likely than average in micro businesses.

There is a high level of awareness of terms associated with microbial threats but there is more to be done in building awareness and action in this area.

FBOs continue to be very reliant on their local council/local authority/ environmental health officer for information and support in meeting food safety and hygiene regulations, but the FSA is making headway as the next most likely source, particularly amongst businesses with 25-49 employees.

There is a very high level of awareness of the FSA; very positive views and very high levels of trust in the Agency. If there is an area that requires improvement, it would be around the perception of the extent to which the FSA understands the needs of small food businesses. Primary industry businesses, specialist retailers and businesses do not handle food directly tend to have a poorer understanding of the FSA's role.

Across all FBOs around half are actively involved in compliance with food standards and regulations day to day while the remainder pay attention to it only when necessary. Around half do not have written procedures to deal with product recalls and withdrawals and/or have not experienced a food hygiene inspection in the last 12 months.

Just one in eight FBOs have subscribed to the FSA news and alerts service and around three in ten aware of it at all. However, those that have subscribed to it have found it useful. There is also low awareness of the National Food Crime Unit (around one in six). There continues to be a need to promote both these facilities.

Main findings

Business concerns

When prompted with a list of possible concerns, threats or barriers to success, respondents indicating each were as follows:

- Competition in the market (43% of all respondents);
- Taxation, VAT, PAYE, National Insurance and business rates (40%);
- The UK's exit from the EU (35%);
- The number of unnecessarily burdensome regulations (29%)
- Staff recruitment and skills (28%);
- National Living Wage (28%);
- Lack of adequate broadband (25%);
- Meeting regulatory requirements (22%);
- The availability and/or cost of suitable premises (19%);

- Late payment[1] (18%);
- Workplace pensions (16%);
- Obtaining finance (14%).

Expected impact of the UK's exit from the EU

Respondents are twice as likely to expect a negative impact on their business of the UK's exit from the EU as a positive one in the next couple of years; 31%, compared with 14%. However, compared with 2018 views are less polarised and more mixed.

Significant minorities of respondents do not expect the UK's exit from the EU to impact on their business at all (24%) and do not know if there will be an impact or not and whether it will be negative or positive (18%).

Among those who expected a negative impact, the concerns included (of those expecting a negative impact):

- Increased price of raw materials/ingredients (28% of those expecting a negative impact);
- Lack of customers, including tourists/people spending less (22%);
- Import/export tariffs/taxes (12%);
- General uncertainty affecting the business (9%);
- Staffing/recruitment/skills difficulties (5%);
- Job losses/business closures (5%);
- Economic shrinkage/recession (4%);
- Lack of availability of products (4%);
- Increased product/service prices (3%);
- Exchange rates will increase/value of the pound (2%);
- More competition (2%);
- Increased labour costs (1%).

While some positive views included (of those expecting a positive impact):

- More people spending including UK tourists (21% of those expecting a positive impact);

[1] Late payment is when bills are paid later than the terms agreed/stated on invoices

- Become more self-governed/independent (13%);
- Sourcing of home-grown/local/British produce (11%);
- Generally better (11%);
- Makes no difference/minimal effect (8%);
- Increase revenue/business growth (4%);
- Better/free trading (3%);
- Cheaper prices (2%).

Some of those with a positive outlook overlook indicated that they were anticipating a somewhat negative impact short term but that there would be benefits longer term.

Preparing for the UK's EU exit

One in eight respondents report that their business is doing something to prepare for the UK's EU exit. This proportion is higher where there are trading relationships overseas: Wholesalers (30%); importers from the EU/Republic of Ireland (35%); and exporters to the EU/Republic of Ireland (56%).

Among those who are making preparations, activities included:

- Buying/stockpiling (23%);
- Securing suppliers – taking to existing/potential suppliers to ensure they can provide products/services (15%);
- General contingency plans (11%);
- Sourcing more products locally/within the UK (6%);
- Putting project/product launches on hold (6%);
- Promoting the business more (3%);
- Diversifying (3%);
- Closing/selling the business (3%).

The impact of the UK's exit from the EU on regulation

The majority of respondents (69%) hope that regulations around food in the UK will not change as a result of the UK voting to leave the European Union. Of all respondents, a higher proportion hopes for less regulation rather than for more (19%, compared with 7%).

Around a quarter of respondents hoping for less regulation feel the industry is over-regulated at present (27%); and slightly fewer (24%) hope that less regulation is required to make the environment easier/less restrictive. One in six respondents would like less administration/red tape/paperwork (18%) and slightly fewer consider some regulations as unnecessary (16%).

One in six of those hoping for more regulation (16%) feel that more is needed to maintain high food standards, while fewer (15%) feel more is needed to reduce the chances of contamination or danger from allergens. For many, the extent to which the industry is regulated determines the extent of food safety.

General views on regulations

When asked if they agree or disagree with a series of statements about regulations, their views were as follows (the proportions that strongly agree with each statement):

- Regulations are effective at protecting the public: 82% (62% in 2018);
- Information on food safety and hygiene is easy to find and access: 65% (62% in 2018);
- Regulations are reasonable for FBOs: 72% (59% in 2018);
- Regulations are easy and practical to keep to: 53% (54% in 2018);
- The processes in place to ensure FBOs keep to the regulations help to ensure the worst performing FBOs will improve: 61% (50% in 2018);
- Regulations add value to businesses: 55% (48% in 2018);
- The processes in place with regard to food safety, standards and hygiene are conducted fairly: 66% (42%*[2] in 2018);
- The paperwork involved in keeping to the regulations is reasonable: 46% (38% in 2018).

- It should be noted that there were no changes to the methodology that would have resulted in significant increases between 2018 and 2019. Given this is only wave 2, future waves will be monitored to establish whether this is an increasing trend, or a one-off fluctuation.

Confidence in the food industry and its adherence to regulations

When respondents were asked to indicate how certain or uncertain they are that all FBOs in the country are doing what they should to comply with a number of specified food

[2] Slight wording change compared with 2018

safety requirements, they expressed the following views - the proportions that feel quite or very certain that all FBOs:

  - Make sure food is safe to eat: 81% (72% in 2018);
  - Display their food hygiene scheme rating (if they sell food directly to the public): 79% (65% in 2018);
  - Food is correctly labelled/what it says it is: 76% (62% in 2018);
  - Withdraw/recall unsafe food and complete an incident report: 73% (60% in 2018);
  - Provide clear information on allergens: 73% (60% in 2018);
  - Keep records on where they got food from and how this information on demand – known as ‘traceability’: 74% (56% in 2019);
  - Make sure they don’t mislead people by the way food is labelled, advertised or marketed: 70% (54% in 2018).
- It should be noted that there were no changes to the methodology that would have resulted in significant increases between 2018 and 2019. Given this is only wave 2, future waves will be monitored to establish whether this is an increasing trend, or a one-off fluctuation.

Information on potential allergens

Ninety-one per cent of respondents who indicated that their business sells anything packaged at the premises or any unpackaged products (such as takeaway food or meals) provide information on potential allergens that might be contained in any food or drink products that they sell or serve.

In terms of how the information is provided, verbally on request is the most frequently mentioned (31% of those providing any allergen information), followed by in writing as a separate notice on display (29%), in writing on the menu/shelf and/or in writing in a folder provided to guests or in a welcome letter/information (25% in both cases).

Around one in four of those that package their products at the premises provide allergen information somewhere on the packaging (26%) and/or on the ingredient list on the packaging (23%). Those providing unpackaged products, most likely in the form of a meal, are most likely to report that information on potential allergens is provided verbally on request (28%), with just over one in five citing in writing as a separate notice (23%), in writing on the menu/shelf (22%) and/or in writing in a folder provided to guests or in a welcome letter/information (22%).

Awareness of food hygiene issues

More than four-fifths of the more than two-thirds of respondents that handle food directly themselves had heard of superbugs (83%), while slightly fewer had heard of antibiotic resistance (79%). Around half the respondents that handle or prepare food products themselves (52%) were aware of antimicrobial resistance, while just two-fifths (39%) were aware of the acronym that also references antimicrobial resistance – AMR.

Overall, 92% of respondents that have direct contact with food within their business were aware of at least one of these terms.

Respondents that had heard of any of the terms regarding 'bugs' and superbugs were asked if any of a number of issues could, in their view and to their knowledge, lead to anti-microbial/antibiotic resistance among people. Around three-quarters of respondents who have heard of any of these terms indicated that they believe that the use of antibiotics by people may lead to anti-microbial/antibiotic resistance among people (73%), fewer than half are aware that resistant bacteria in the food chain (48%) and use of antibiotics in farm animals (44%) might do the same.

External sources of information, advice and support

Micro and small FBOs continue to be heavily reliant on their local council/authority for information and support in meeting food safety and hygiene regulations: 62% cite this as source.

One in four (25%) spontaneously cite the Food Standards Agency in this context, and the vast majority of respondents are aware of the FSA.

Local authority/district council/DAERA

Approaching half the respondents (46%; 49% in 2018) report their business having had contact with their local authority or council, or DAERA[3] (in the case of Northern Ireland) with regard to food safety or hygiene issues in the last 12 months.

This contact is most likely to have been face to face i.e. via inspections (80%; 84% in 2018).

The 46% of respondents whose businesses have had contact with their local authority/council/DAERA rated the organisation they had had contact with based on their

[3] DAERA: Department of Agriculture, Environment and Rural Affairs (NI)

experience and the proportions giving a rating of 8 or above on a range of aspects were as follows:

- Trustworthiness: 84% (79% in 2018);
- Ease of dealing with the organisation: 81% (78% in 2018);
- How approachable the organisation was: 78% (79% in 2018);
- Clarity of communications from the organisations: 83% (76% in 2018).

Eighty-eight per cent of respondents considered the contact they had with their local authority/council/DAERA easy (87% in 2018). Just 6% had found it difficult (7% in 2018).

FSA

The vast majority of all respondents (97%; 94% in 2018) had heard of the FSA before taking part in the survey. However, just 5% of these reported having had any contact with the FSA (other than only through the website) in the last 12 months (9% in 2018).

Two-fifths of those that had heard of the FSA had visited the FSA website (39%).

Eighty-three per cent of those aware of the FSA feel they have at least a fairly good understanding of the FSA's role (84% in 2018), including 31% feel they have a very good understanding of its role (35% in 2018).

The 5% of respondents whose businesses have had direct contact with the FSA (more than just a visit to the website) rated the FSA based on that contact, and the proportions giving a rating of 8 or above on a range of aspects were as follows:

- Trustworthiness: 96% (52% in 2018);
- Ease of dealing with the FSA: 96% (60% in 2018);
- How approachable the FSA is: 99% (61% in 2018);
- Clarity of communications from the FSA: 92% (51% in 2018).

- It should be noted that the figures reported are based on very small sample sizes (in both 2018 and 2019). Thus, there is potential for a substantial variation in responses between samples.

Ninety-seven per cent of the 5% of all respondents that have had any contact with FSA (*including* those that have only visited the website) found it easy to obtain all the information they wanted from the FSA (81% in 2018).

Respondents aware of the FSA prior to being called to participate in the survey (97% of all respondents), were asked to indicate the extent to which they agree or disagree with a number of statements about the FSA. The proportions strongly agreeing with each are as follows:

- I trust the FSA to use any information they give the FSA appropriately: 64% (58% in 2018);
- I trust the FSA to uphold and promote high standards: 67% (new question for 2018);
- The FSA is working hard to improve the food industry for all of us: 64% (52% in 2018);
- The FSA is good at identifying where poor standards exist: 59% (43% in 2018);
- The FSA is highly effective at regulating the food industry: 49% (40% in 2018);
- The FSA would be a good organisation to work with: 52% (46% in 2018);
- The FSA understands the needs of small businesses: 40% (29% in 2018);
- The FSA's work is very influential in maintaining standards within the food industry: 68% (35% in 2018).

Consumer-facing and particularly food/beverage service businesses tend to be more likely than average to hold positive views.

Taking these statements all together (with the exception of 'the FSA's work is very high profile) and aggregating responses to obtain an indicator of 'overall trust'[4] and 'high trust'[5], 62% of all respondents aware of the FSA could be said to trust the FSA overall (56% in 2018), while 24% could be said to have a high level of trust (20% in 2018).

Those that have had recent contact with the FSA are more likely than those that have not to have a *high* level of trust in the FSA (30%, compared with 21%).

It should be noted that there were no changes to the methodology that would have resulted in significant increases between 2018 and 2019. Given this is only wave 2, future waves will be monitored to establish whether this is an increasing trend, or a one-off fluctuation.

Processes and interventions experienced

Just over half of all respondents report their business has had a food hygiene inspection in the last 12 months (52%; 63% in 2018), fewer than one in ten reports any other process or intervention being experienced by their business:

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[4] Based on agreeing with all statements
[5] Based on strongly agreeing with all statements

- 7% have had a food sample taken;
- 7% have registered as a food business (42% of the 4% of businesses that have been established less than a year);
- 5% have voluntarily closed down following the need for improvements having been identified before reopening again;
- 2% have experienced a food safety product recall or withdrawal;
- 1% have had enforcement action taken against them.

One in four respondents (25%) report having received advice or training about meeting food safety, standards or food hygiene regulations.

The majority of respondents reporting experience of each feel that they have received clear communications with regard to each of these processes.

The vast majority of respondents found it easy to complete the processes.

Just over half the respondents (52%; 60% in 2018) report that their business has written procedures in place to guide them on how to deal with product recall or withdrawal, increasing to 78% of larger small businesses (with 25-49 employees), and 89% within manufacturing and 72% within the wholesale sector. The proportion is lower than average within accommodation businesses.

FSA withdrawals and recalls resources

Six per cent of respondents who were aware of the FSA before being surveyed had accessed FSA withdrawals and recalls resources in the last 12 months. This increases to 11% of respondents in Wales, of those in larger small businesses (25-49 employees) and where there has been contact with the FSA in the last 12 months.

The resources accessed by those that have accessed any in the last 12 months include:

- Editable allergy alert template for point of sale (51%);
- Guidance on Food Traceability, Withdrawals and Recalls within the UK Food Industry (49%);
- Example food incident key decision log (40%);
- Example contacts template (34%);
- The Quick Reference Guide that complements the Guidance of Food Traceability, Withdrawals and Recalls within the UK Food Industry (31%);
- Example template for notifying the enforcement authority (29%);
- Business to business template (23%);
- Editable product recall template for point of sale (23%);

- “An Introduction to Root Cause Analysis” e-learning course (17%);
- Root Cause Analysis best practice example (17%);
- Root Cause Analysis report form (17%);

Time taken to comply with standards and regulations

Around half of respondents (49%) described the time taken within their business to comply with food standards and regulations as minimal – part of everyday activities; while a further quarter (26%) said there was always a lot to do. Most of the remainder (21%) reported that it takes up some time but that the amount of time varies across the year.

More time is spent on compliance within larger businesses, which may reflect the availability of staff, and therefore time available, to devote to these activities, although it will also reflect the need to do more where there are more staff, perhaps a wider range of products and services and, possibly functions, and larger or multiple premises.

Sources of information

Nine in ten respondents (90%) feel at least quite well informed about regulations that affect their business overall. This includes 42% that feel very well informed. Most of the remainder feel that they are not very well informed (8%), with 1% feeling not at all well informed and a 1% not sure.

The top three sources of information about food safety guidelines and regulations, food allergies and product recalls were: Google or similar (i.e. a web search) (58%); their local authority/district council/DAERA[6] website (57%) and the news (51%). The Food Standards Agency website is selected by just over two in five respondents (44%), while more than one in four respondents cited Food Standards Agency leaflets (28%) and one in six respondents mentioned the Food Standards Agency helpline (18%).

Food and beverage services businesses tend to use a wider range of sources than other sectors and are significantly more likely than average to use many, particularly their local authority/district council/DAERA website (61%); and the Food Standards Agency website (53%); although respondents in manufacturing businesses are more likely still to select the FSA website as a source (62%).

In terms of the most useful source of information, respondents are equally likely to opt for their local authority/district council/DAERA website (19%) and the FSA website (18%).

FSA news and alerts service

One in eight respondents that are aware of the FSA (13%) have subscribed to the FSA news and alerts service to receive food and allergy alerts by email or text message (as in 2018). A further 16% have heard of the service but not subscribed to it.

Subscribers are more strongly represented in the wholesale (22%) and manufacturing (21%) sectors, and this is reflected in the higher proportion of importers/exporters/distributors (17%) that have subscribed to the service.

Of the 13% of respondents whose business subscribed to the service, 88% rated the alerts service as at least quite useful, with the majority (61%) rating it as very useful. The proportion rating it as very useful increases to 71% of food/beverage services businesses.

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[6] DAERA – Department of Agriculture, Environment and Rural Affairs

National Food Crime Unit

One in six respondents (17%) are aware of the National Food Crime Unit (18% in 2018).

Nearly three-quarter of those aware of the National Food Crime Unit (72%; 52% in 2018) are aware that food crime can be reported anonymously to the National Food Crime Unit.

Imports and exports

One in ten respondents (10%) report that their business directly imports any goods or services from a supplier, producer or wholesaler situated outside the UK (15% in 2018). The proportion increases to 38% within Northern Ireland, 49% of wholesalers and 32% of manufacturers.

More than four in five businesses that import buy from suppliers, producers or wholesalers based in the EU including Republic of Ireland (83%; equating to 8% of all businesses), which includes more than three in five importers that import from the EU but not Republic of Ireland (63%). A third of importers buy from outside the EU (33%; 3% of all businesses), of whom around half import from outside the EU only.

Around one in twenty businesses export (4%) but this increases to 23% of wholesalers and 22% of manufacturers. The proportion that export is higher than average in Northern Ireland (12%).

More than two-thirds of exporters (69%; 3% of all businesses) export to the EU, including the Republic of Ireland, while two-fifths (41%; 2% of all businesses) export to markets outside the EU and 14% export only to markets outside the EU (1% of all businesses).

Use of IT systems and facilities

Seven in ten respondents reported that their business has one or more of a range of specified IT systems and facilities (71% do so), finance systems being the most common (64%). Around two in five respondents report operations computer systems and software within their business (42%) and/or systems and software relating to business staffing (38%).

The propensity to have any of these computer systems and software increases with organisation size; 97% of larger small businesses (25-49 employees) have any, compared with 67% of micro businesses (less than 10 employees). Multi-site businesses are significantly more likely than single site businesses to have any computer systems and software in place for these functions.

Businesses within wholesale, manufacturing and accommodation sectors are significantly more likely than average to have one or more functions covered by computer systems and software (89%, 91% and 82% respectively). The proportion is lower than average within food and beverage services businesses (66%) and relatively low among primary food producers (70%).

Conclusions

The UK's exit from the EU

Views on the possible impact

- Views were less polarised - more mixed - than in 2018
- FBOs are still more likely to see the potential impact as negative rather than positive

Vulnerability

- FBOs in Northern Ireland, reflecting the levels of inter-trade with the Republic of Ireland, are more likely than those based elsewhere to be concerned

Preparation

- Only a minority of FBOs - around one in eight - are preparing for the UK's EU exit

Regulations

Overall very positive views

- Some mixed feelings but generally regulations are perceived as beneficial to maintaining good standards and the majority of FBOs feel they need to be preserved
- Regulations viewed as necessary to food safety and that they add value to product/service offers

High levels of trust amongst FBOs

- Most FBOs believe that other FBOs are doing what they should with regard to food safety, standards and regulations

Traceability improved

- There have been significant improvements in the extent to which FBOs perceive that other FBOs are providing product traceability – perhaps linked to publicity around the danger of potential allergens

FSA

The FSA's role

- While FBOs continue to rely on LAs/councils for information and support, the FSA are a leading source for *larger* small FBOs (25-49 employees)

Very positive views

- Very high levels of awareness, positive views and trust re: FSA
- But FBOs are not as confident that the FSA understand the needs of small businesses

FSA support tools

- Awareness and usage of the FSA news and alerts service and its withdrawals and recalls resources are at low levels

A Summary of the Business Profile

The profile of micro and small FBOs is as follows[7]:

- 82% of FBOs sell directly to the public (93% in 2018);
- More than half of FBOs are food and beverage services businesses. Retailers account for 18% of all FBOs; primary food producers for 16%; 4% are within accommodation services; 4% are wholesalers and 3% are manufacturers;
- 96% of businesses operate from one site only;
- 79% employ fewer than 10 employees across all sites, this includes the 53% of all surveyed that employ fewer than 5 employees; 17% employ between 10 and 24 employees, and 4% between 25 and 49 employees;
- 42% have been trading for at least 10 years (55% in 2018); 41% for more than 20 years (32% in 2018); 29% have been trading for up to 5 years (28% in 2018); 4% established in the last year (3% in 2018).
- 10% directly import any goods or services from a supplier, producer or wholesaler situated outside the UK (15% in 2018), increasing to 38% in Northern Ireland; and 49% of wholesalers;
    - 83% of importers, or 8% of all businesses source goods or services from the EU (94% and 13% respectively in 2018);
- 4% export (3% in 2018), increasing to 12% of FBOs in Northern Ireland; 22% of manufacturers and 23% of wholesalers;
    - 68% of exporters (3% of all businesses) export to the EU (93% in 2018).

[7] The data is weighted based on population statistics and thus the weighted profile represents the in-scope population – see Background section in this report.

Business Concerns and Anticipated Impact of the UK's Exit from the EU

This chapter highlights the main concerns and perceived threats or barriers to the success of micro and small food business operators (FBOs); the anticipated impact of the UK's exit from the EU and what, if anything, businesses are doing to prepare for it is discussed.

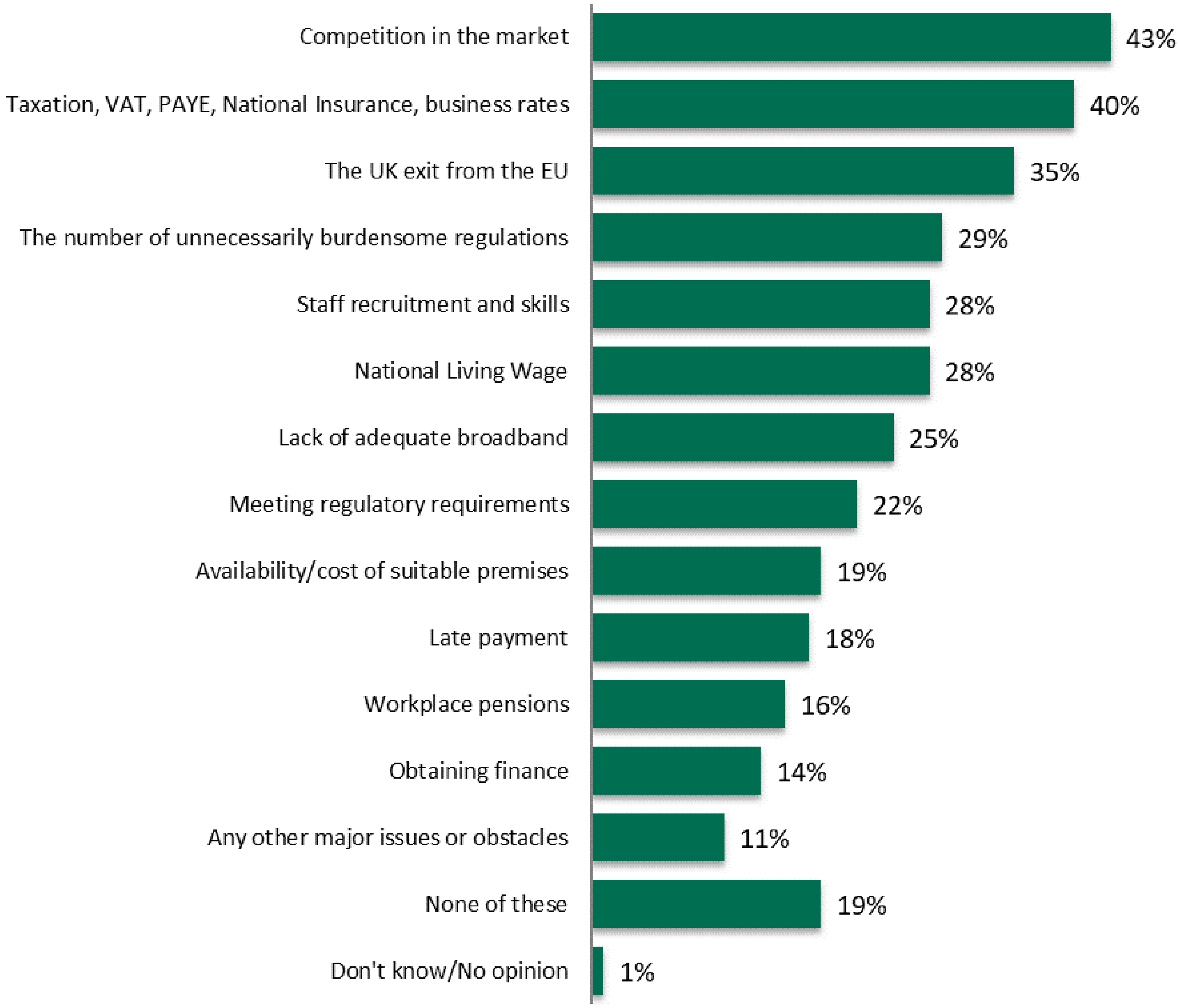
Summary: Business concerns and anticipated impact of the UK's exit from the EU
Competition in the market, taxation, VAT, PAYE, National Insurance and the UK's exit from the EU are the top three concerns, threats or barriers to the success of the business.
The UK's exit from the EU is a concern for around a third of respondents, particularly those in Northern Ireland, those within the primary food production and wholesale sectors and among exporters and importers.
Respondents are twice as likely to expect a negative impact on their business from the UK's exit from the EU as a positive impact, but views are less polarized than they were in 2018 and there is an increase in the proportion who feel the impact will be mixed. Around one in four respondents do not expect any impact, which is a similar proportion to a year ago.
There is still a great deal of uncertainty surrounding the UK's exit from the EU, with one in six respondents unable to estimate the impact (as in 2018).
Concerns around the UK's exit from the EU revolve around possible increased product/service prices, possible increases to tariffs and taxes, potential reduction in the scale of tourism, as well as reduction in spending among UK customers, possible labour and skill shortages, reduction in national economic growth, potential job losses and business closures and general uncertainty causing, in the main, delays to investment, over-stocking and other decisions being put off until after the UK's exit.
Positive views with regard to the potential impact of the UK's exit from the EU revolve around the possibility of more people holidaying in the UK, an increase in demand for UK produce, greater independence for the UK and the opportunity for free trade. Some of the views expressed by those with a positive outlook suggest short term challenges, leading to longer term benefits.
Those preparing for the UK's exit from the EU are in the minority but the proportion is higher than in 2018. Larger businesses and those that export or import from the EU are more likely to be preparing.
Preparation for the UK's exit from the EU tends to revolve around building up stock levels, sourcing new suppliers, as well as securing contracts with existing suppliers to minimise price increases.

Summary: Business concerns and anticipated impact of the UK's exit from the EU
Respondents are significantly more likely to hope for less regulation than more as a result of the UK's exit from the EU. Continuing on from 2018 there is some feeling that there is a degree of over-regulation at present – including the perception that there is an imposition of regulations that are not always wholly relevant to some businesses - and that less regulation would result in lower costs and more time to spend on day to day operation of the business.
Regulations are viewed positively by some respondents who feel they help to maintain standards and ensure that businesses abide by the same rules to the benefit of fair competition and keeping the public safe.

Concerns, threats or barriers to success

From a list of possible concerns, threats or barriers, respondents were asked to indicate those they consider to be detrimental to the success of their organisation. Their responses are summarised in the figure below.

Figure 1: Concerns, threats or barriers to the success of businesses – prompted, multiple response (all respondents)



Unweighted sample base = 644

B2. I'm now going to read out a list of possible concerns, threats or barriers to the success of your business, please tell me which apply to your business?

Top of the list as a concern, threat or barrier to the success of the business is **competition in the market** which was selected by more than two-fifths of respondents (43%) and this is selected significantly more frequently than average among manufacturing (55%) and wholesale (64%) businesses. It is particularly likely to be a concern among businesses that export (68%).

Taxation, VAT, PAYE, National Insurance and business rates is selected by two-fifths of respondents (40%). This proportion increases to 50% among those in the accommodation sector and, again, is significantly more likely than average to be selected as a concern, threat or barrier by exporters (59%), as well as importers (52%).

The UK's exit from the EU is considered a concern, threat or barrier to success of the business by around a third of respondents (35%). This proportion is significantly higher among businesses in Northern Ireland (58%) and among businesses in primary (60%) and wholesale (49%) sectors. Naturally importers (63%) and exporters (74%, increasing to 86% of those exporting to the EU) are more likely to consider this a concern.

More than a quarter of respondents cite **the number of unnecessarily burdensome regulations** (29%), **staff recruitment and skills** (28%), and the **National Living Wage** (28%) as concerns, threats or barriers to success. The latter two, involving staff issues, are of greater concern to larger businesses (10-49 employees) than to those with fewer than 10 employees. The National Living Wage is most frequently mentioned of the three amongst these larger businesses.

A quarter of respondents mention **lack of adequate broadband** (25%), but this increases to a third of small businesses (32% of those with 10 to 49 employees) and to nearly half of businesses within the primary sector (47% - suggesting perhaps that this is the root cause of the lower propensity to have an internet presence among these businesses).

Just over a fifth of respondents (22%) selected **meeting regulatory requirements** as a concern. This proportion is significantly higher than average within Northern Ireland (38%) and among businesses in the primary (39%) and manufacturing (33%) sectors. Once again, it is of greater concern for those interfacing with overseas markets; 39% of importers; 57% of exporters, although there is no discernible EU factor, as businesses that deal with non-EU destinations are more likely to be concerned about this than those that deal with suppliers and customers in the EU.

The availability and/or cost of suitable premises is a concern, threat or barrier to success for nearly a fifth of respondents (19%). It is more likely than average to be identified as an issue by multi-site businesses (31%).

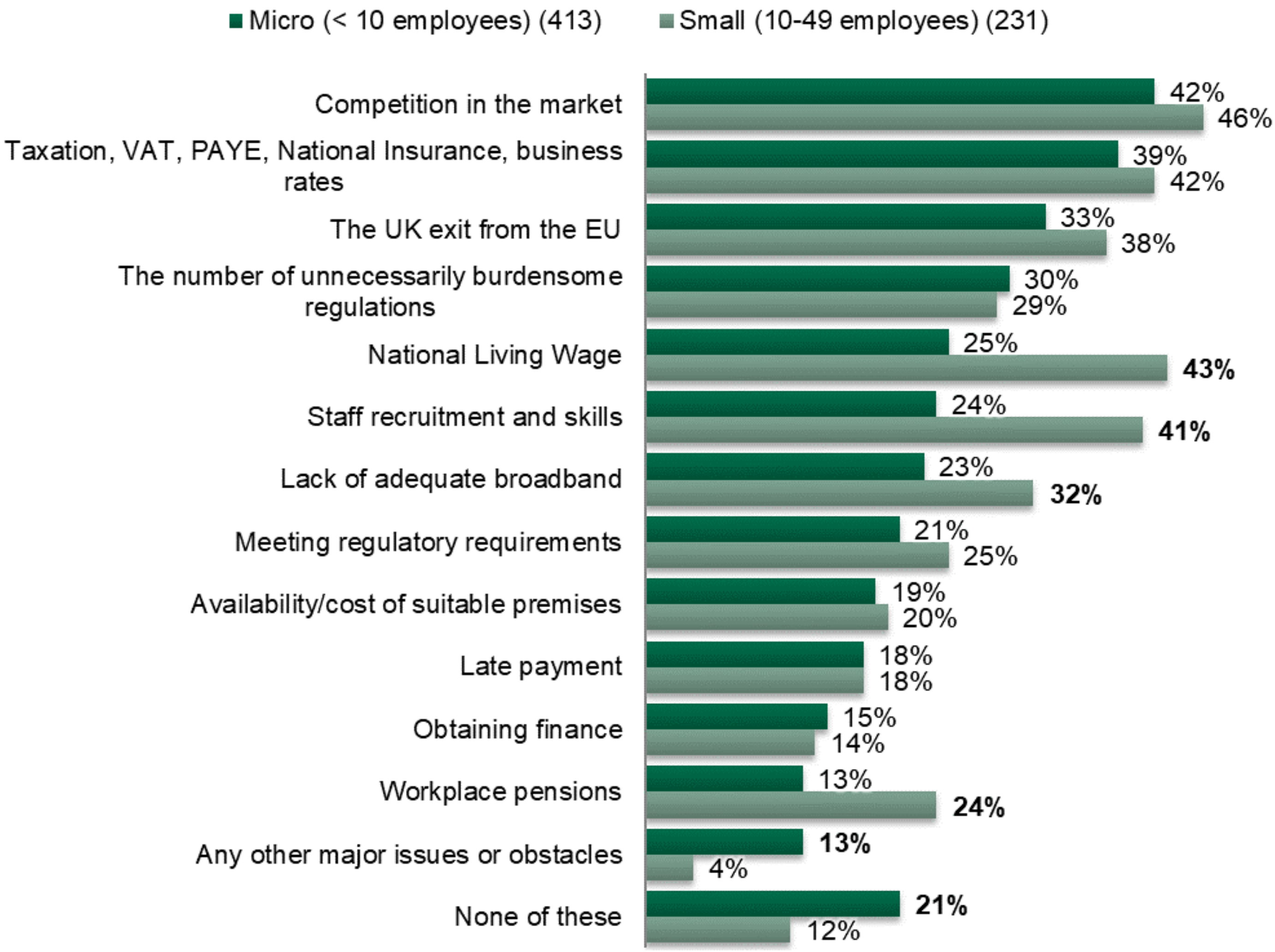
Late payment is a concern for one in six respondents (18%) and this is a more significant issue for businesses in wholesale (46%) and manufacturing (38%) sectors, as well as (linked to this), businesses that import (41%) and export (56%).

One in six respondents (16%) consider **workplace pensions** a concern. Reflecting the extent to which the extent of the impact of this relies on the size of the workforce, it is a significantly greater issue within small businesses than micro businesses (24% where there are 10-49 employees).

One in seven respondents (14%) consider **obtaining finance** a concern, threat or barrier to the success of the business. It is of significantly greater concern for manufacturers (27%), businesses that have been established for between one and five years (20%), and exporters (27%) and importers (22%). It increases to one in four respondents in Northern Ireland (25%).

Views of respondents based on whether they work within or own a micro or small business are summarised in the figure below.

Figure 2: Concerns, threats or barriers to the success of businesses, by organisation size – prompted, multiple response (all respondents)



Unweighted sample bases in parentheses

B2. I'm now going to read out a list of possible concerns, threats or barriers to the success of your business, please tell me which apply to your business?

Figures in bold are statistically significantly higher than comparison figures to a 95% confidence level

See *A5* [8](Annex 1) for a summary of concerns, perceived threats and barriers to business success within the different sectors.

Expected impact of the UK's exit from the EU

Respondents were asked if they expect the UK's exit from the EU to have a negative or positive impact on their business over the next couple of years.

As in 2018, they are twice as likely to expect a negative impact as a positive one but, compared with 2018 views are less polarised and more mixed. Largely/some negative impact, 31% (36% in 2018); largely/some positive impact, 14% (17% in 2018); mixed impact 13% (7% in 2018).

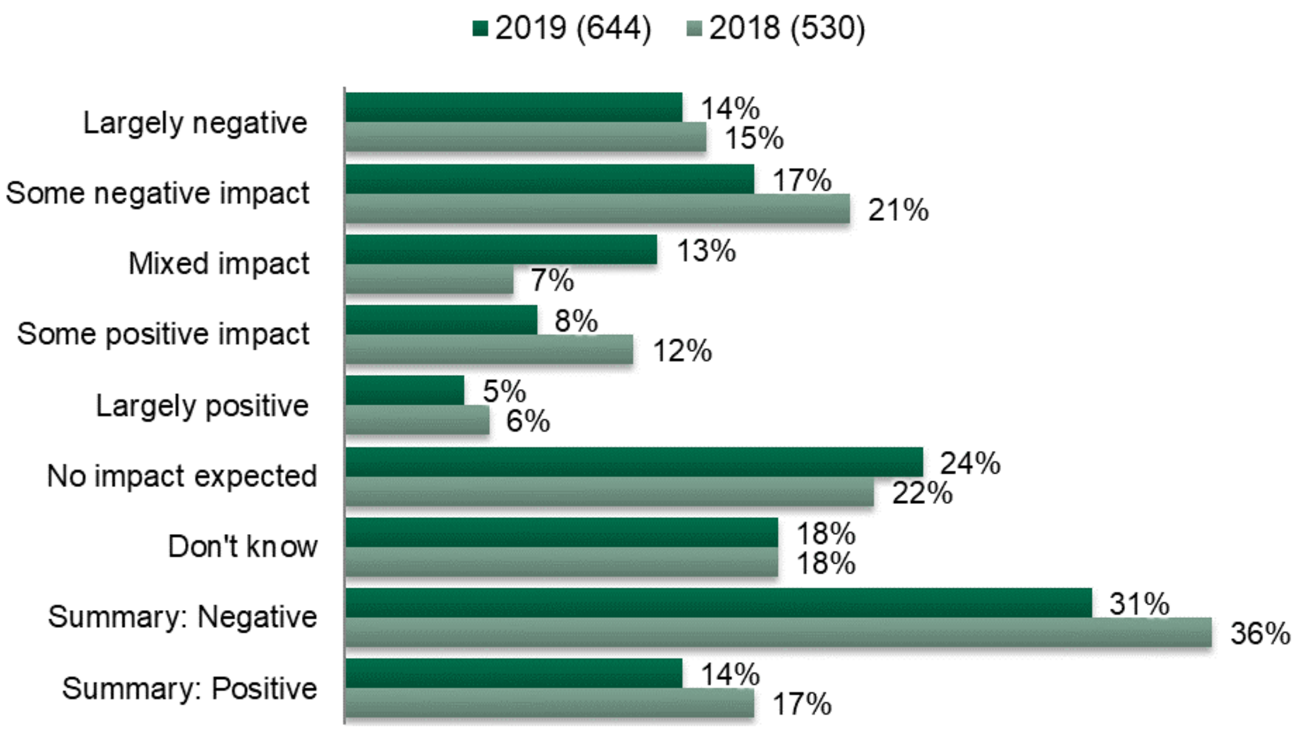
A slightly higher proportion of respondents this year compared with last do not expect the UK's exit from the EU to impact on their business at all (24%, compared with 22%). The vast majority of these respondents represent businesses that do not export (98% of them) and that do not import (97%).

A significant minority – one in six respondents (18%, as in 2018) – do not know how to respond to this question. Again, these are mainly businesses that neither export nor import, but the proportion varies little by size and sector.

It is worthy of note that there is no less uncertainty regarding the UK's exit from the EU a year on from the first wave of this tracking survey, more than three years following the EU exit referendum in 2016.

[8] [CTRL + CLICK] on blue text to go to detailed information if viewing digitally.

Figure 3: Anticipated impact of the UK's exit from the EU on the business (all respondents)



Unweighted sample base = 644

B3. Over the next couple of years do you expect the UK's exit from the EU to have a negative or positive impact on your business?

Respondents in Northern Ireland are slightly more likely than average to expect a negative impact (42%, including 20% that expect a largely negative impact). Respondents in Wales are significantly more likely than average to anticipate a largely positive impact (14%), while less likely to foresee the potential impact as mixed (4%).

There is little difference by organisation size, although multi-site businesses are slightly more likely than single site businesses to have a view either way, with 39% expecting a negative impact and 24% expecting a positive impact (compared with 31% and 13% respectively).

By sector, differences in opinions tend to reflect the extent of engagement with overseas markets within the sectors; respondents within wholesale businesses are significantly more likely to have negative expectations than those in other sectors (46%).

This is supported by the fact that 72% of exporters, increasing to 82% of those exporting to the EU, expect the UK's exit from the EU to have a negative impact and these figures are also significantly higher than average among importers (61%, increasing to 65% of those importing from the EU).

Respondents in the accommodation sector tend to be more positive than average, with 31% expecting a positive impact; compared with 15% that expect a negative impact. This is counter-intuitive given the potential for the UK's exit from the EU to reduce the availability of migrant labour and possibly make visiting the UK more difficult for EU visitors. However, when asked why they feel positive about it, most respondents in this sector expecting a positive impact (75% of this group) cite the possibility of more people (UK residents mainly) spending on UK stays. See *50* (Annex 1) for more detail.

Views on the impact

When asked why they anticipate the impact on their business of the UK's exit from the EU in the way that they do, respondents with a negative outlook (31% of all respondents) gave the following reasons:

- Increased price of raw materials/ingredients (28% of those expecting a negative impact);
- Lack of customers, including tourists/people spending less (22%);
- Import/export tariffs/taxes (12%);
- General uncertainty affecting the business (9%);
- Staffing/recruitment/skills difficulties (5%);
- Job losses/business closures (5%);
- Economic shrinkage/recession (4%);
- Lack of availability of products (4%);
- Increased product/service prices (3%);
- Exchange rates will increase/value of the pound (2%);
- More competition (2%);
- Increased labour costs (1%).

Comments from these respondents that help to illustrate these concerns, and in particular the anticipated increase in the cost of raw materials and products from EU suppliers, include:

> "Numerous suppliers have already put prices up and have stated that this will continue."

> "Customer uncertainty - people aren't buying and it could push the business into recession."

> "Not sure how to process overseas staff or if visas will be required or passports need to be seen; cannot hire overseas students for summer; not sure how to handle tax/VAT afterwards; cannot set next year's pricing as details of Brexit not yet confirmed; cannot properly predict impact on costs."

> "Staffing may be affected - a lot of staff from the EU, few British people are willing to work weekends and evenings."

> "They [HMRC] will want to see extra documentation and more customs checks and will be more expensive."

Respondents with a <u>positive</u> outlook with regard to the UK's exit from the EU (14% of all respondents) gave the following reasons for having this view.

- More people spending including UK tourists (21% of those expecting a positive impact);
- Become more self-governed/independent (13%);
- Sourcing of home-grown/local/British produce (11%);
- Generally better (11%);
- Makes no difference/minimal effect (8%);
- Increase revenue/business growth (4%);
- Better/free trading (3%);
- Cheaper prices (2%).

The views expressed on why there is a positive outlook do not all reflect an unequivocally positive perspective, with some views hinting at benefits for the business arising as a consequence of other businesses' losing out as a consequence of the UK's exit from the EU. This relates to increasing market share as a result of businesses closing; more people not being able to holiday abroad; people being forced to buy British as a result of higher priced imports. Comments include:

> "Because we still get a large amount of EU visitors and are booking for the next couple years, and we see a growth in that."

> "If the pound remains weaker it will make the UK a better value to visit. Cheaper place to visit so many EU visitors will come."

> "Less regulations - more business opportunities - increase in economic activity."

> “More control over products and production in the country, more local goods used.”

Some of the positive outlook arises from the end to uncertainty.

> “For 3 years the country has been uncertain on what's happening and once it’s done the country will relax and do more. And once they do realise it's out of the EU, they might start spending more money on pubs again.”

Reasons for holding the view that the impact will be mixed (13% of all respondents) include:

- General uncertainty with regard to what is going to happen (41% of those expecting a mixed impact);
- the UK’s exit from the EU is likely to have both negative and positive impacts (20%);
- An expectation of increased product prices (12%);
- An expectation of more difficulty sourcing items (7%);
- The possibility of fewer visitors coming from overseas (2%).

Comments from these respondents include:

> “I think it will be mixed because it will affect our staffing in a different way to the effect it’s going to have on the business that's going to be coming in.”

> “Supply of certain food items may change - should iron itself out quickly or we can change the menu to adjust to the change.”

> “Less tourists from abroad but more local travel.”

Some respondents have an expectation of a short-term negative impact followed by a more positive impact in the longer term.

> “Initially negative but long-term positive. Trade will find a way to deal with it.”

Preparing for the UK's EU exit

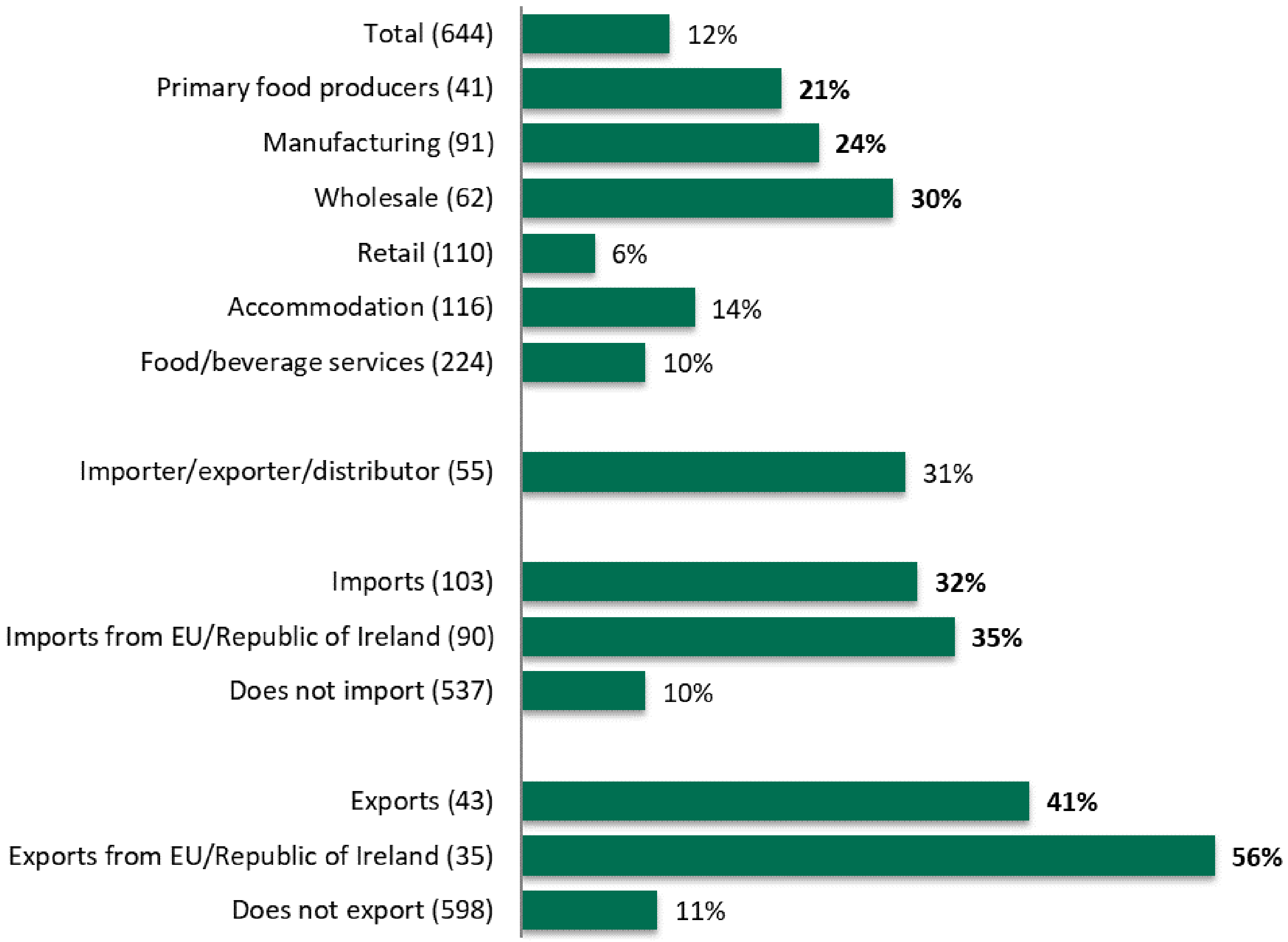
One in eight respondents reported that their business is doing something to prepare for the UK's EU exit (12%), this is a higher proportion than in 2018 (8%). The proportion is significantly higher than average within businesses with between 25 and 49 employees (26%), and multi-site businesses (27%).

Businesses that trade with overseas markets are significantly more likely than average to be doing anything to prepare for the UK's EU exit: 41% of exporters, increasing to 56% of those exporting to the EU; 32% of importers, increasing to 35% of those importing from the EU.

This is also reflected in the higher than average proportion of wholesalers (30%), manufacturers (24%) and primary food producing (21%) businesses that are doing something to prepare for the UK's EU exit. Just 6% of food/beverage retailers and 10% of food/beverage services businesses are making preparations.

Three in ten importers, exporters and distributors in aggregate (30%) are preparing for the UK's exit from the EU, which is a similar proportion to that reported in 2018 (31%).

Figure 4: Proportion of businesses that are doing something to prepare for the UK's EU exit, by sector and trading activity (all respondents)



Unweighted sample bases in parentheses

B6. Is your business doing anything to prepare for the UK's EU Exit?

Figures in bold are statistically significantly higher than the total minus the sub-group tested to a 95% confidence level

The 12% of all respondents that reported that their business has been preparing for the UK's exit from the EU reported a number of activities but they are focusing mainly on preparing for a reduction in available supplies or more difficulty in obtaining supplies.

While the most frequently mentioned activity this time last year was increasing product prices (17% of those preparing for the UK's EU exit then), only 1% of respondents gave this as an answer this year. This year, the most frequently mentioned activity is bulk buying/stockpiling (23%), followed by securing suppliers – talking to existing/potential suppliers to ensure they can provide products/services (15%).

Small businesses are more likely to be bulk buying than micro businesses (33% where 10-49 employees; 19% where <10 employees); and more than half of those preparing for the UK's exit from the EU in retail (56%) report this activity.

Securing suppliers, while addressing the similar concerns with regard to ensuring there are sufficient raw materials or products to maintain the necessary level of sales, is a different approach as it does not involve spending more now in the expectation of spending less later. It is an approach more likely to be taken by businesses in Wales (32%) and Northern Ireland (33%) and by food/beverage service businesses (26%). Food and beverage service businesses will undoubtedly have a need to secure fresh products or those with a limited shelf life at least and bulk buying/stockpiling is unlikely to work for them for all the products they need.

Another approach to overcoming supply issues is sourcing more products locally, or within the UK; 6% of those preparing for the exit from the EU. Food and beverage service businesses are more likely than average to cite this as something they are doing (13%). Only small businesses mention they are taking this approach (22% that employ 10-49 staff) and it is more common among multi-site businesses (23%, compared with 5% of single site businesses).

As in 2018, one in ten cited general contingency plans (11%), while 6% are putting project/product launches on hold; 6% are promoting the business more – including internationally; 3% are diversifying and a further 3% are closing/selling the business.

Diversification or termination of the business is mentioned only by micro, single site businesses.

The following respondents' comments highlight the key points:

> "Talking to customers in different ports in the UK - buying stock prior to the dead line."
>
> "Focus on local products instead of trading in the EU."
>
> "Got a number registered from the GOV website to allow us to bring items from the EU into the UK."
>
> "Have put up prices 10% due to expected increase in utility and supply costs."
>
> "Making sure the suppliers are contracted and not bumping up the prices."

> “Most of my employees are EU citizens so making sure they have applied for the citizenship.”

> “Shut down trading with the EU, now sourcing from the far East.”

> “We're trying to follow the government guidelines.”

The impact of the UK’s exit from the EU on regulation

Respondents were asked how they hope regulations around food in the UK will change as a result of the UK voting to leave the European Union. As in 2018, the majority (69%) hope for no change, while respondents are more likely to be hoping for less regulation than more (19%, compared with 7%).

Compared with the same time last year there is a move towards hoping for no change (59% in 2018) and fewer hope for less regulation than was the case 12 months ago (28% in 2018).

The propensity to hope for no change in regulation around food in the UK as a result of the UK’s exit from the EU increases with organisation size, from 67% in micro businesses to 78% within businesses with 10-24 employees to 81% within businesses with 25-49 employees. This is likely to reflect the more complex logistics involved in responding to changes in regulation for larger businesses.

Reasons for hoping for more regulation

Of the 7% of all respondents hoping for more regulation as a result of the UK leaving the EU, one in six (16%) feels that food standards will fall otherwise. One in eight (13%) feels that more regulation is needed to reduce the chances of contamination or danger from allergens.

There is some feeling that the extent of regulation maintains food safety and this is reflected in the following comments:

> “Safety (is) always priority when dealing with food.”

> “To make sure we keep up the high standards - proper regulation/ protection making sure the markets don’t get flooded with cheap imports.”

> “To ensure that this country high standards are maintained.”

> "[I have] concerns about reported deaths from allergen contamination and feel customers need to be confident that what they're eating is safe."

The view that there is a need to build on the regulations that exist, strengthen their enforcement and also ensure they are directed towards the appropriate sources, is also reflected in respondents' comments:

> "We manufacture a specific product that needs good regulation and the regulation for these products needs to be strengthened as inferior products may be imported due to us leaving the EU and importing from other markets."

> "Would like to see more environmentally friendly farming and landscape management, more regulation at the source rather than at the retail end."

> "Have more rules in place around allergens."

> "Not more regulation but more awareness and higher standards and more enforcement of regulations."

Reasons for hoping for less regulation

Of the fifth of all respondents (19%) hoping for less regulation after the UK's exit from the EU, around a quarter feel the industry is over-regulated at present (27%) and/or that less regulation is needed to make the environment easier/less restrictive (24%). One in six respondents hoping for less regulation would like less administration/red-tape/paperwork (18%) while slightly fewer consider some regulations as unnecessary or even 'silly' (16%).

Respondents comments with regard to hoping for less regulation include:

> "Because there is a lot of duplications currently."

> "More difficult to run the business with all of the regulations."

> "There are certain regulations that don't affect us in general business terms and we are still bound by them."

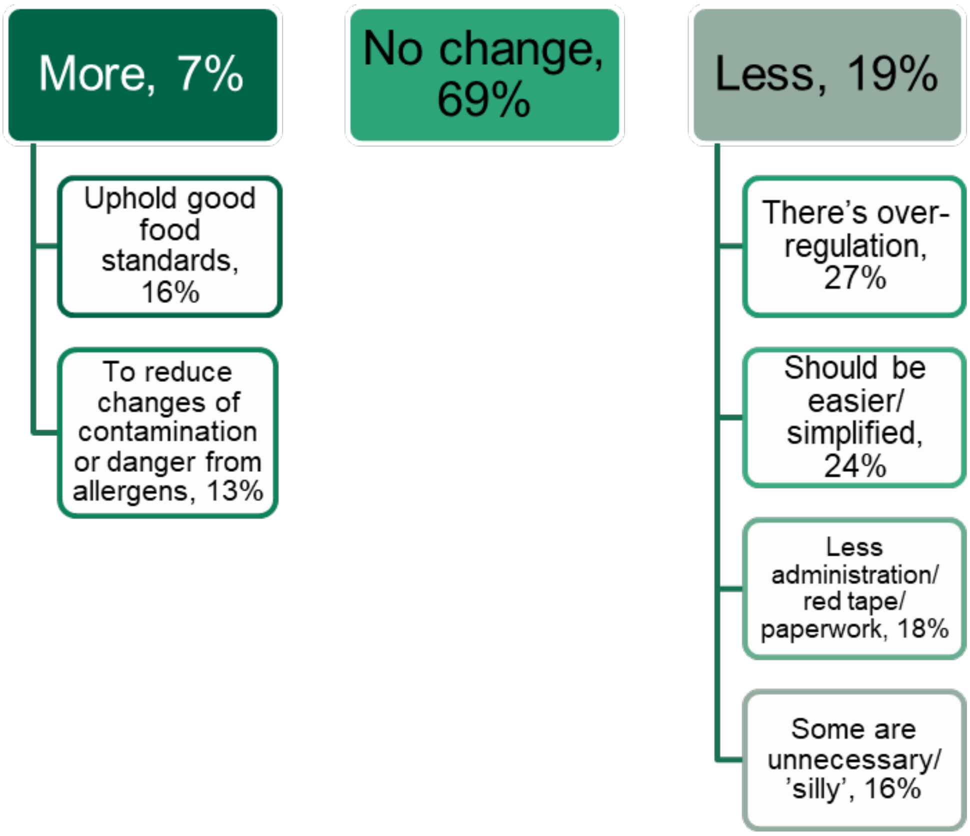
Some respondents referred specifically to the EU as a source of regulations that, they suggest, are costly and complicated to comply with:

> "For a small business complying to all the EU regulations is costly."

“Some of the EU legislations are very complicated and quite difficult to comply with and not necessarily needed to comply with.”

“There are too much regulations to agricultural goods on the whole, we have enough food waste in the world and with the EU it’s a lot more.”

Figure 5: Hopes for level of regulation around food following the UK’s exit from the EU (all respondents)



Awareness of and Attitudes to Regulation

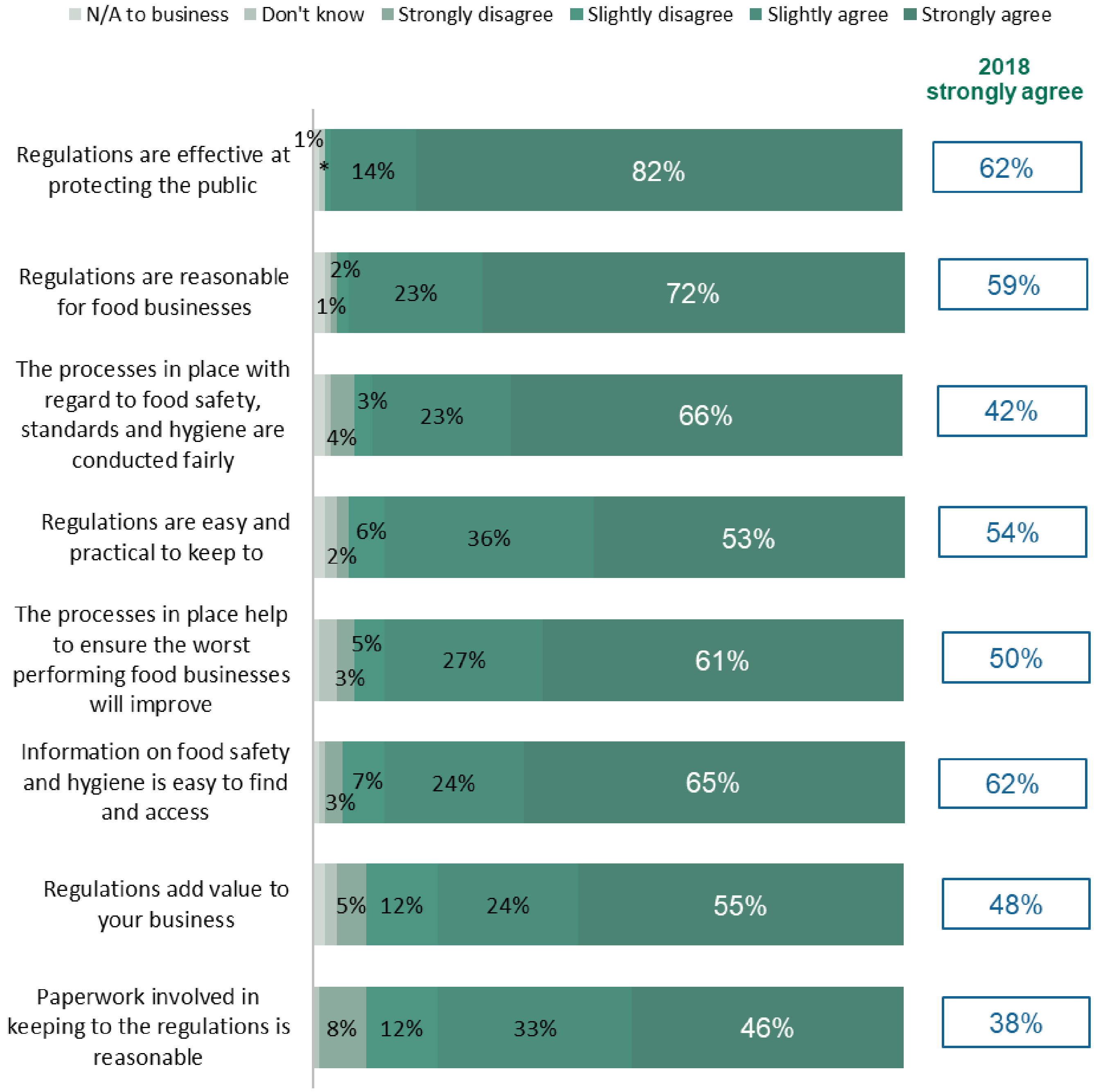
This chapter explores awareness of and attitudes towards food safety and food hygiene regulations amongst food business operators (FBOs). It summarises how businesses obtain information on these issues.

Summary: Awareness of and attitudes to regulation
There is a high level of agreement that regulations are effective, reasonable, necessary for customer safety, that they are applied fairly, that information them are easy to access and that they add value to FBOs. At least four-fifths of respondents agree with statements regarding these aspects of regulations, including around two-thirds that agree strongly.
Although around four-fifths of respondents agree that the paperwork involved in keeping to the regulations is reasonable, they are less likely to strongly agree with this statement that with other statements mentioned (just over two-fifths).
There is a high degree of confidence that FBOs in the country are doing what they should to comply with food safety requirements. A core minority, of around one in six to one in five, are uncertain of this. As in 2018, there is least confidence with regard to labelling and making misleading claims.

General views on regulations

Respondents were asked whether they agree or disagree with a series of statements about regulations. Their views are summarised in the figure below.

Figure 6: Extent to which respondents agree or disagree with statements about regulations (all respondents)



Unweighted sample base = 644 N/A to business – 1-2%; Don't know - <0.5-4%

C1. To what extent do you agree or disagree with the following statements...?

Around four-fifths strongly agree that **regulations are effective at protecting the public** (82%) and nearly three-quarters strongly agree they **are reasonable for FBOs** (72%). There has been an increase in the propensity to strongly agree with both these statements since 2018 (62% and 59% respectively then).

Since 2018, there has also been an increase in the proportion of respondents within food business operators that strongly agree that:

- the processes in place to ensure FBOs keep to the regulations are conducted fairly (66% strongly agree; 42% in 2018);
- regulations add value to businesses (55%; 48% in 2018);
- the processes in place to ensure FBOs keep to the regulations help to ensure the worst performing FBOs will improve (61%; 50% in 2018); and
- the paperwork involved in keeping to the regulations are reasonable (46%; 38% in 2018).

However, there is little change since 2018 with regard to the proportion that strongly agree that **information on food safety and hygiene is easy to find and access** (65% strongly agree; 62% in 2018) or that **regulations are easy and practical to keep to** (53%; 54% in 2018).

At least around four-fifths of all respondents agree with these statements. The proportion is highest with regard to the statement: **regulations are effective at protecting the public** (97%); followed by **regulations are reasonable for FBOs** (95%).

Fewer respondents generally agree (slightly or strongly) that **regulations add value to businesses** (79% agree; 73% in 2018); and that **the paperwork involved in keeping to the regulations are reasonable** (79% agree; 72% in 2018).

Exploring where there are different attitudes or views with regard to regulations between businesses that have an FHRS rating or 3 or above and those with a lower FHRS rating (0-2) there is little evidence this year of a less supportive attitude towards regulations among the latter. However, lower rated businesses are significantly more likely than average to disagree that **the processes in monitoring and checking FBOs with regard to food safety, standards and hygiene are fair** (17%, compared with 7%).

With regard to whether regulations are **effective** and **reasonable**, differences in views are minor by sector. Respondents in the accommodation sector are least likely to strongly agree that they are, while primary food producers are most likely to strongly agree they are **effective at protecting the public** (88%) and food and beverage services businesses are most likely to strongly agree that they **are reasonable** (76%). See A6[9] (Annex 1) for more detail.

[9] [CTRL + CLICK] on blue text to go to detailed information if viewing digitally.

In terms of **regulations adding value to the business**, larger small businesses (25-49 employees) are significantly more likely than average to agree (92%, compared with 79%). Food and beverage services businesses are particularly likely to strongly agree with this (65%). Two-fifths of primary food producers (40%) *disagree* that regulations add value.

As concluded in 2018, there continues to be a link between regulations adding value to businesses and having a direct relationship with the public, with those directly serving the public significantly more likely than those that do not to agree that **food safety and standards and food hygiene regulations add value to their business** (57%, compared with 44%).

Overall, 88% of respondents agree that **regulations are easy and practical to keep to**. A significantly higher than average proportion of respondents in Wales disagree that this is the case (16%, compared with 8%), which reflects the fact that respondents in Wales have tended to be less likely to agree this year and last. The propensity to disagree that regulations are easy and practical to keep to is also significantly higher than average among exporters (23%) and within manufacturing (14%) and the accommodation sector (14%).

Businesses involved in selling direct to the public are significantly more likely than those that do not to strongly agree that **regulations are easy and practical to keep to** (57%, compared with 31%). Businesses in which products are packaged at the premises are less likely than average to strongly agree that regulations are easy and practical to keep to (43%) and more likely to disagree (16%).

In terms of the extent to which respondents agree or disagree that **the processes in place to ensure FBOs keep to the regulations are conducted fairly**, those within larger small businesses (25-49 employees) are significantly more likely than average to disagree (16%) and this reflected also among those with more than one site (21%).

One in five respondents in Wales (20%) disagree that **processes are conducted fairly**. By sector manufacturers are least likely to strongly agree (54%, compared with an average of 66%) and food and beverage services businesses most likely to do so (70%). As mentioned previously, this is the only statement on which there is a significant difference in the propensity to agree or disagree between low performing and higher FHRS rated businesses. See *Statistically* higher than average responses are highlighted in bold.

A8 (Annex 1) for more detail.

Most respondents agree that **the processes in place to ensure FBOs keep to the regulations help to ensure the worst performing FBOs will improve** (88%). This includes three-fifths of all respondents (61%) that strongly agree. The proportion that agrees is significantly higher than average within food and beverage services businesses (92%), where 68% of all respondents strongly agree that this is a benefit.

Businesses that have achieved higher FHRS ratings are more inclined to strongly agree with this statement than those with a rating of below 3 (65% of businesses rated at 3+, compared with 55% of those rated at 0-2). See (Annex 1) for more detail.

Views on paperwork and information

More than three-quarters of respondents agree that **the paperwork involved in keeping to the regulations is reasonable** (79%) and 20% disagree that it is. This is an improvement on 2018 (72% agreed; 26% disagreed).

As in 2018, businesses involved in serving the public directly (85%, compared with 52% of those that are not) and within the food and beverages services sector (88%) are more likely than average to feel that **the paperwork is reasonable**. Half of primary food producers (51%) disagree that the paperwork is reasonable, compared with 12% of food and beverages services businesses. See

Statistically higher than average responses are highlighted in bold.

A10 (Annex 1) for more detail.

Most respondents agree that **information on food safety and hygiene is easy to find and access** (88%), with the majority of these (65% of all respondents) strongly agreeing.

Again, businesses that serve the public directly are significantly more likely to agree that this **information is easy to find and access** than those that do not (91%, compared with 77%) and this is reflected in the views across the different sectors, with respondents in food and beverage services (76%) and accommodation (66%) businesses particularly likely to strongly agree that this is the case.

One in five respondents within manufacturing disagree that **information is easy to find and access** (20%), and the proportion is also slightly higher than average among primary food producers (15%).

While respondents within businesses that have an FHRS rating of 3+ are significantly more likely average to strongly agree that **information is easy to find and access** (72%), those within businesses that are lower rated are more likely than them to slightly agree. Overall, there is little variation in the extent to which respondents agree or disagree by FHRS rating. This suggests that lack of information is not necessarily the issue for these businesses. See *A11* (Annex 1) for more detail.

In line with levels of agreement about the ease of finding and accessing information, 93% of respondents report confidence in **knowing who to contact if they need advice on food safety or hygiene** (90% in 2018). The proportion is higher than average among respondents in Wales (97%) and lower in Northern Ireland, where it has decreased compared with 2018 (87%, compared with 97%). It is significantly higher amongst respondents that work in businesses that serve the public directly (95%) compared with those that work in businesses that do not (87%).

Nearly all respondents in the accommodation sector (99%) feel they **know who to contact if they need advice on a food safety or hygiene issue**, which compares with just 84% of those that work in businesses that are involved in trading and distributing food and beverage products.

Confidence in the food industry and its adherence to regulations

Respondents were asked to indicate how certain or uncertain they are that all FBOs are doing what they should to comply with a number of specified food safety requirements. For some their views will reflect their direct involvement with and participation in activities which are subject to these food safety requirements, while others will be commenting from a more observational perspective.

Respondents have the greatest levels of confidence that all FBOs **make sure food is safe to eat** (81% are certain, including 47% that are very certain). This presents a significant increase in confidence since 2018 (when 72% were certain, 30% very certain). Just one in six (16%) is uncertain that this is the case (23% in 2018).

They are almost as confident that FBOs that sell direct to the public **display their food hygiene scheme rating** (79% are certain, including 42% that are very certain). Compared with 2018, this proportion is slightly higher (75%, including 35% that were very certain then).

Compared with 2018, there is a significant increase in confidence that FBOs **make sure food is correctly labelled/what it says it is** (76% are certain, compared with 62% in 2018) and that they **make sure they don't mislead people by the way food is labelled, advertised or marketed** (70%, compared with 2018).

In terms of **information provided on allergens,** 73% of respondents are certain that all FBOs are doing what they need to in order to make this clear and this level of confidence is also significantly higher than in 2018 (60%).

Around three-quarters of respondents are certain that FBOs keep records on where they go food from and show this information in demand (traceability) (74%) and withdraw/recall unsafe food and complete incident reports (73%). Again, respondents are more certain about the prevalence of these standards being upheld now than they were 12 months ago (57% and 60% were certain in 2018 respectively).

There is a core minority of respondents – one in six to one in five, that are *uncertain* that all FBOs are doing what they should be in these areas. This contrasts with between one in three and two in five that is *very certain* that this is the case for food safety and hygiene issues.

Views across all FBOs are summarised in the figure below.

Figure 7: Extent to which respondents are certain or uncertain that all FBOs in the country are likely to be doing what they need to with regard to food safety and hygiene (all respondents)

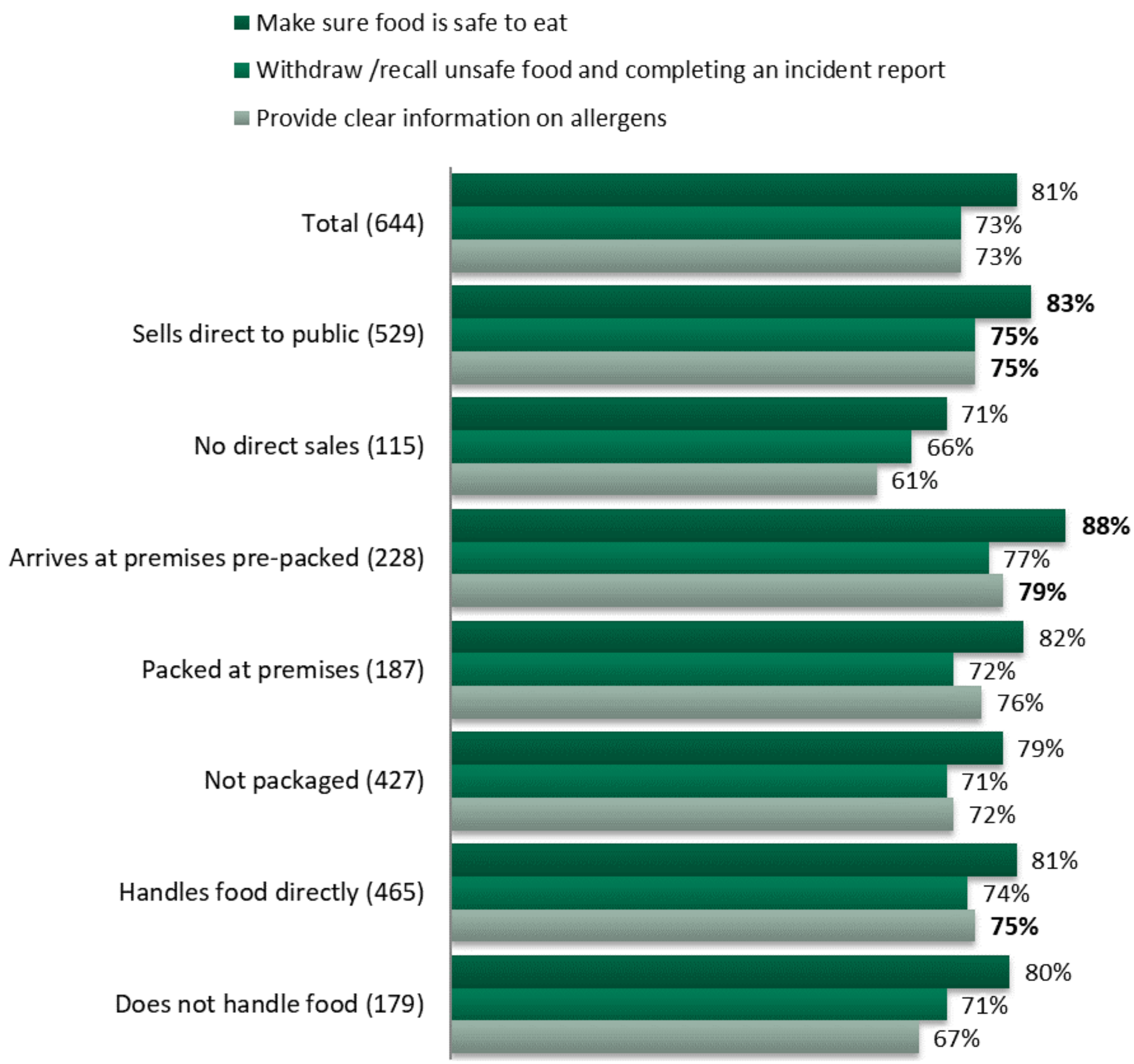
Unweighted sample base = 644

C3. How certain or uncertain are you that all FBOs in this country are likely to be doing what they need to in order to ...?

Food safety

Focusing on activities that are strongly associated with food safety, such as ensuring that food is safe to eat, that clear information is provided on allergens and that unsafe food is withdrawn or recalled, there are higher levels of certainty amongst respondents with businesses that sell directly to the public, those that sell products that arrive with them pre-packed, and, in the case of information on allergens, respondents that directly handle food themselves.

Figure 8: Extent to which respondents are very certain that all FBOs are doing what they should be with regard to food safety, by whether or not they sell products directly to the public and distribute pre-packed products (all respondents)



Unweighted sample bases in parentheses. *Figures in bold are statistically significantly higher than the total minus the sub-group tested to a 95% confidence level*

C3. How certain or uncertain are you that all FBOs in this country are likely to be doing what they need to in order to ...?

There is little variance by organisation size, but those working within wholesale are most likely to be certain that FBOs are acting in these ways. See

A12 (Annex 1) for more detail.

Food labelling

Focusing on the extent to which respondents are confident that all FBOs are following requirements to correctly label food, around three-quarters are certain that all FBOs make sure food is correctly labelled/what it says it is (76%), while slightly fewer are certain that they are all making sure they do not mislead people by the way food is labelled, advertised or marketed (70%).

This suggests a significant improvement in this respect in the last 12 months (62% and 54% respectively in 2018).

One in four respondents (25%) are uncertain that all FBOs make sure they don't mislead on their labelling; one in five are uncertain that all FBOs are making sure labelling is correct.

Micro businesses (less than 10 employees) are significantly more likely than small businesses (10-49 employees) to be confident about FBOs make sure food is correctly labelled (78% are certain; compared with 71%). Around four-fifths of wholesalers, retailers and food and beverage businesses are certain that this is the case and this is reflected in the fact that respondents in businesses that sell directly to the public are significantly more likely than those that do not to be certain of this (80%, compared with 57%). A third of respondents within primary food producers are uncertain that all FBOs correctly label their food (34%, compared with an average of 19%).

With regard to misleading labelling, respondents in single site businesses are significantly more likely than those in multi-site businesses to be certain that all FBOs make sure that they don't mislead people by the way food is labelled, advertised or marketed (72%, compared with 44%), and the proportion is significantly higher amongst those in businesses that sell directly to the public than those in businesses that do not (74%, compared with 55%). Again, respondents within primary food producers are most uncertain of this (41% are uncertain, compared with 25% on average). See *A15* (Annex 1) for more detail.

Traceability

In terms of 'traceability' i.e. keeping records on where they obtained food from and being able to show this information on demand, around three-quarters of all respondents (74%) are certain that all UK FBOs fulfil this requirement. Around a fifth is not certain this is the case (18%). This compares with 57% and 36% respectively in 2018, again, suggesting significant improvement in the last year.

One in three respondents (35%) are very certain that all FBOs can fulfil demands for traceability of the food products they use and the proportion is significantly higher than average within micro businesses (38%) and amongst respondents who work within general retail businesses (48%).

Respondents in higher FHRS rated businesses are less sure of traceability across all FBOs than those in poor performing businesses (22% of those within a business rated as 5, compared with 12% of those within a business rated at below 3 are uncertain).

Respondents in Northern Ireland are significantly more likely than those in England or Wales to be certain that all FBOs are doing what they should be with regard to food product traceability. See (Annex 1) for more detail.

FHRS rating display

Around four-fifths of respondents feel certain that all FBOs display their food hygiene scheme rating (if they sell food direct to the public) (79%), with two-fifths very certain this is the case (42%). One in six respondents (17%) are not certain of this.

In 2018, 65% were certain; 30% uncertain; thus there has been a significant increase in confidence about this within the last 12 months.

As in 2018, Northern Ireland respondents are significantly more likely than average to be confident that all FBOs display their food hygiene scheme rating (92% are certain, including 54% that are very certain), and respondents in England are the least confident across the three nations (78% are certain).

Respondents within businesses that sell directly to the public are significantly more likely than those that do not to feel certain that all FBOs display their food hygiene scheme rating (82%, compared with 63%), and the proportion is higher than average within food and beverage (83%) and retail (84%) organisations. See A18 (Annex 1) for more detail.

Addressing potential allergens and food hygiene

This chapter examines what food business operators provide to their customers with regard to information on potential allergens as part of their overall approach to ensuring food safety and how knowledgeable they are with regard to basic food hygiene terms.

Summary: Addressing potential allergens and food hygiene
Nine in ten FBOs that serve the public directly provide information on potential allergens that might be contained in any food or drink products that they sell or serve. The proportion is higher among food and beverage services organisation and FBOs that sell direct to the public.
The most common way in which information on allergens is shared with customers is verbally (31%), followed closely by on a written notice on display (29%). Around one in four respondents within FBOs that package their own products report that allergen information is provided somewhere on the packaging (26%).
Of the more than two-thirds of respondents that directly handle or prepare food products, around four-fifths have heard of superbugs (83%) and antibiotic resistance (79%). Around half are aware of antimicrobial resistance and two-fifths aware of its acronym – AMR (39%).

How information on potential allergens is provided

Respondents who indicated that their business sells anything packaged at the premises or any unpackaged products (such as takeaway food or meals) were asked if they provide information on potential allergens that might be contained in any food or drink products that they sell or serve. Nearly all, 91%, do so. This equates to 69% of all respondents.

The proportion that provide such information increases to all of those in Northern Ireland that sell anything packaged at the premises or unpackaged and is significantly higher within small than micro businesses (97%, compared with 89%). Respondents in food and beverage services organisations (96%) and in businesses that sell directly to the public (94%) are significantly more likely than average to provide information on potential allergens.

In terms of how the information is provided, verbally on request is the most frequently mentioned (31% of those providing any allergen information; 22% of all respondents), followed by **in writing as a separate notice on display** (29%; 20% of all respondents), **in writing on the menu/shelf** and/or **in writing in a folder provided to guests or in a welcome letter/information** (25%; 17% of all in both cases). The various options were not prompted, with respondents mentioning them spontaneously.

As a proportion of all respondents, the larger the business, in terms of number of employees, the more likely it is to make written information on potential allergens available. Small businesses are significantly more likely to provide the information than micro businesses (85% of those with 10 or more employees, compared with 65% of those with less than 10 employees) and significantly more likely to provide it **as a separate notice on display** (26%, compared with 19%) or **in writing in a folder provided to guests to in a welcome letter/information** (27%, compared with 15%). However, it is not applicable in more than twice as many micro than small businesses (27%, compared with 12%).

As one would expect businesses directly serving the public, i.e. those in accommodation and food and beverage services, are significantly more likely than average to provide information on potential allergens (94% and 92% respectively). Accommodation businesses are more likely than food and beverage services businesses to provide the information in multiple ways, particularly **in writing on the menu/shelf** (43% of all accommodation businesses, compared with 26% of all food and beverage services businesses). See (Annex 1) for more detail.

Respondents reporting that their business' products are packaged at the premises are more likely than those that sell their products unpackaged to report that information on potential allergens is provided (88%, compared with 82%), but some of those that sell their products unpackaged are primary food producers that trade in livestock or arable crops and for them this is not applicable (10% of those reporting products are unpackaged).

Around one in four of those that package their products at the premises provide allergen information **somewhere on the packaging** (26%) and/or **on the ingredient list on the packaging** (23%). One in five provide the information **as a separate notice on display** (20%) and/or **in a folder** (20%) and/or **on the menu/shelf** (19%). Those providing unpackaged products, most likely in the form of a meal, are most likely to report that information on potential allergens is provided **verbally on request** (28%), with just over one in five citing **in writing as a separate notice** (23%), **in writing on the menu/shelf** (22%) and/or **in writing in a folder provided to guests or in a welcome letter/information** (22%).

Awareness of food hygiene issues

More than two-thirds of respondents (69%) reporting directly handling or preparing food products. These respondents were asked if they were aware of medical terms associated with food hygiene. More than four-fifths had heard of **superbugs** (83%), while slightly fewer had heard of **antibiotic resistance** (79%). Around half the respondents that handle or prepare food products themselves (52%) were aware of **antimicrobial resistance**, while just two-fifths (39%) were aware of the acronym that also references antimicrobial resistance – **AMR**.

Overall, 92% of respondents that have direct contact with food within their business were aware of at least one of these terms.

Respondents in Northern Ireland were significantly more likely than those in England or Wales to be aware of **antimicrobial resistance** (77%; 68% aware of **AMR**).

While respondents in businesses that sell directly to the public are twice as likely as those within businesses that do not to be aware of **AMR** (40%, compared with 20%), they are less likely to be aware of other terms, most significantly, **superbugs** (82%, compared with 98%).

The least knowledgeable sector is that of retail (89% are aware of any; just 79% are aware of **superbugs** and 73% are aware of **antibiotic resistance**). Respondents in businesses that sell their products unpackaged are among the most knowledgeable, with 85% aware of **superbugs** and 80% aware of **antibiotic resistance**.

Although respondents within low FHRS rated businesses have similar levels of awareness of terms overall, a higher proportion than those within businesses with a rating of 3 or more are unaware of any (19%, compared with 8%). *This is not statistically significant due to the low sample base for low rated businesses.* See *A20* (Annex 1) for more detail.

Respondents that had heard of any of the terms regarding 'bugs' and superbugs were asked if any of a number of issues could, in their view and to their knowledge, **lead to anti-microbial/antibiotic resistance among people**. While around three-quarters of these respondents, who have already indicated that they have a basic knowledge (73%) believe that **the use of antibiotics by people** may lead to anti-microbial/antibiotic resistance among people, fewer than half are aware that the other factors might do the same: **resistant bacteria in the food chain** (48%); and **use of antibiotics in farm animals** (44%). Overall 8% of respondents that have heard of any of the specified terms are not aware of these factors that could lead to anti-microbial/antibiotic resistance and most of these respondents work within food/beverage service businesses (82% of them) and nearly all sell unpackaged products (94% of them).

External sources of information, advice and support

This chapter explores sources of information, advice and support for food business operators (FBOs) and examines interaction and perceptions of local authority and environmental services.

Summary: External sources of information, advice and support
Following on from 2018 local councils/authorities continue to be a very significant source of information and support in meeting food safety and hygiene regulations for respondents. Sixty-two per cent of respondents report that they play a role in providing their businesses with information and support in meeting regulations and nearly half (46%) have had contact with them in the last 12 months.
Face to face contact, mainly in the form of inspections is the most common way in which businesses interact with their local council/authority and the level of trust in and satisfaction with communication with, these organisations is high.

Information sources

As in 2018, micro and small FBOs appear heavily reliant on their local council/authority/environmental health officer for information and support in meeting food safety and hygiene regulations. Sixty-two per cent of respondents spontaneously report that these local agencies play a role in providing this service.

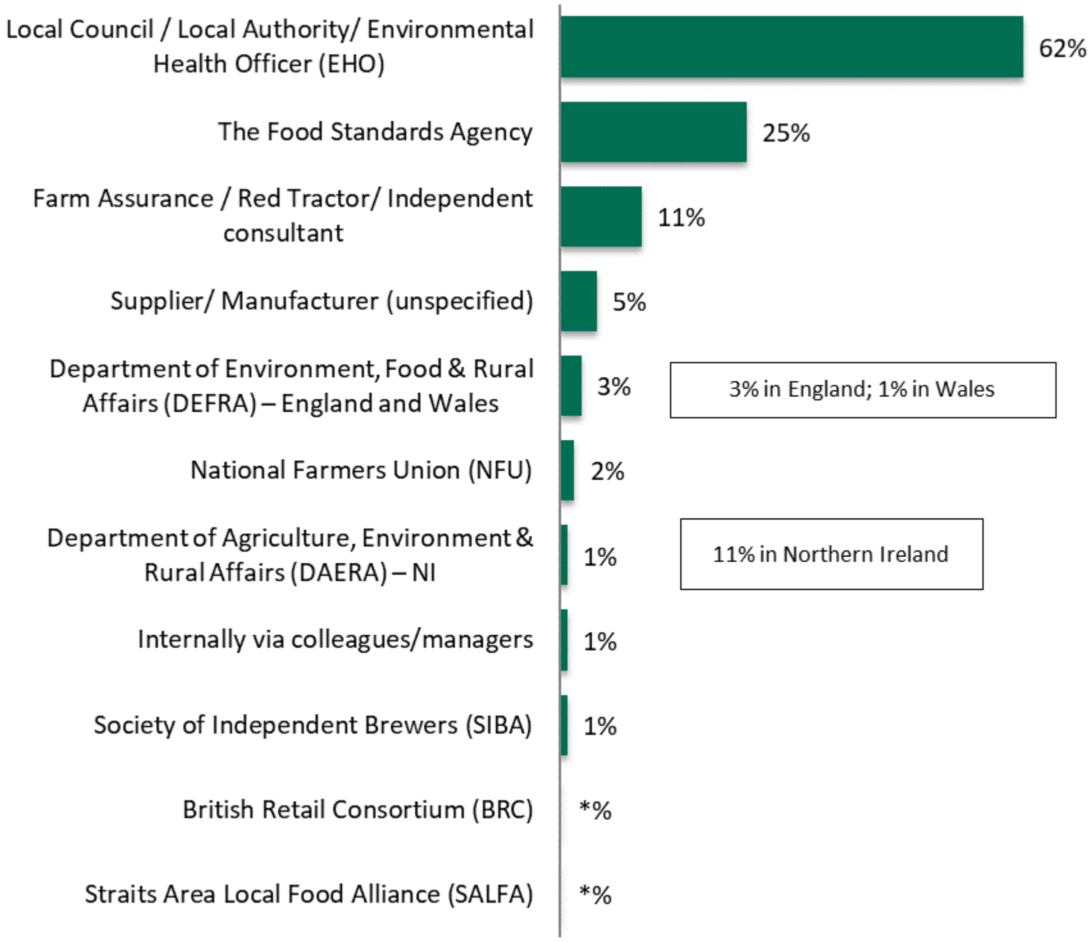
The Food Standards Agency is the next most frequently cited source of information and support (25%), followed by Farm Assurance/Red Tractor/Independent consultant (11%). When those respondents not spontaneously mentioning the FSA were asked if they had heard of it, a further 72% indicated they had done; thus 97% of all respondents had heard of the FSA. This compares with 94% in 2018.

Other organisations cited as playing a role in providing information, support and/or checking that the business is meeting food safety and hygiene regulations are mentioned by very small minorities of respondents and include: DEFRA[10] (England and Wales)

[10] DEFRA – Department of Environment, Food and Rural Affairs

(3%); DAERA[11] (Northern Ireland) (11% in Northern Ireland - 1% of all), the National Farmers Union (2%); the Society of Independent Brewers (1%); and suppliers/manufacturers (5%). Less than 1% mentioned the Straits Area Local Food Alliance; the British Retail Consortium; or the Soil Association. One per cent mentioned colleagues within their organisation even though they were asked to think about external organisations.

Figure 9: Organisations or people who play a role for businesses in providing information, support and/or checking that businesses are meeting the regulations – unprompted, multiple response (all respondents)



Unweighted sample base = 644 * denotes less than 0.5%

C4 Which external organisations or people play a role in providing information, support to your business to help you in meeting regulations?

[11] DAERA – Department of Agriculture, Environment and Rural Affairs

Mentions of the local council/local authority/EHO are significantly higher than average among respondents based in Wales (78%) or Northern Ireland (75%), as well as among those working in retail organisations (73%) and by respondents directly handling food (69%, compared with 46% of respondents that do not do so).

The proportion of respondents mentioning the FSA as an organisation that plays a role for their business in this respect is significantly higher than average among respondents within businesses with 10-24 employees (35%), as well as those within businesses that sell directly to the public (29%), including food and beverage services businesses (31%), accommodation (31%) and manufacturing businesses (30%). This proportion is highest among respondents within businesses with the highest FHRS rating (31% of those rated at 5), which compares with just 23% of respondents within low rated businesses (0-2 FHRS rating) and 17% of respondents whose business operates outside of the rating scheme or has yet to be awarded a rating.

Half of respondents within primary food producers mention Farm Assurance/Red Tractor (51%), which is cited by around half the respondents within businesses that do not sell direct to the public (49%), while one in five manufacturers (19%) cite the FSA. One in seven respondents within primary food producers cite DEFRA (15%), and one in ten cite the National Farmers Union (10%). Respondents within the wholesale sector are more likely than average to cite DEFRA (8%); the British Retail Consortium (9%); and the Straits Area Local Food Alliance (SALFA).

Local authority/district council/DAERA

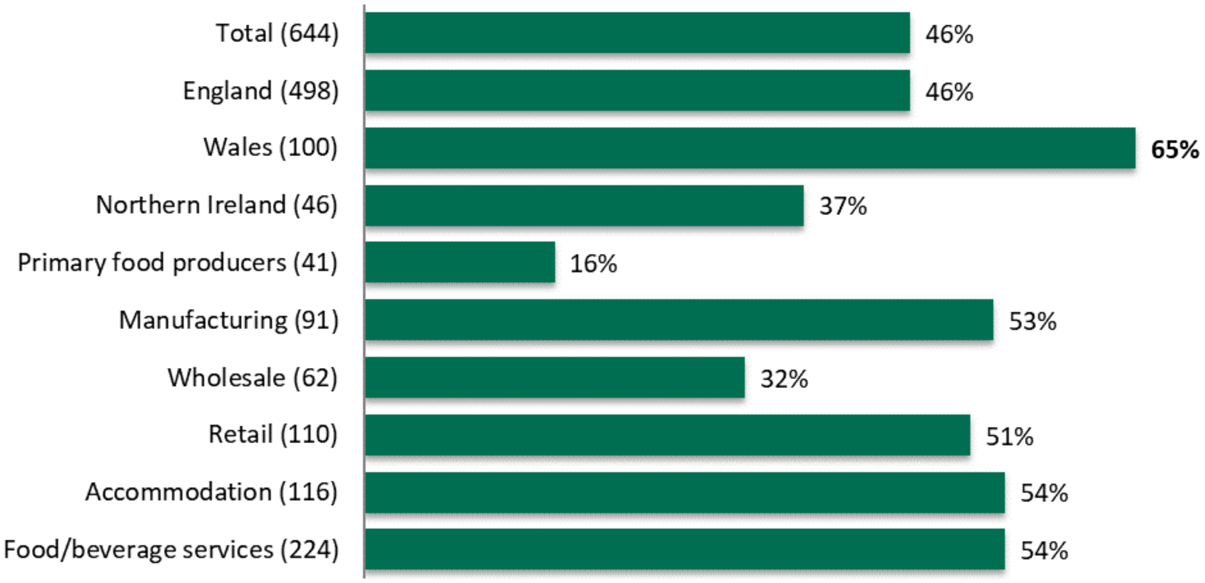
Approaching half the respondents (46%) report their organisation having had contact with their local authority or council, or DAERA[12] (in the case of Northern Ireland) with regard to food safety or hygiene issues in the last 12 months. This compares with 49% in 2018.

The proportion of respondents reporting any contact is significantly higher in Wales (65%), as it was in 2018, and is most likely within accommodation and food and beverage services organisations (54% in each case – again, as it was in 2018).

Businesses that sell direct to the public are twice as likely as those that do not to have had contact with their local authority/council/DAERA in the last 12 months (52%, compared with 20%).

[12] DAERA: Department of Agriculture, Environment and Rural Affairs (NI)

Figure 10: Proportion of respondents that have had contact with their local authority/district council/DAERA with regard to food safety or hygiene issues in the last 12 months (all respondents)



Unweighted sample bases in parentheses

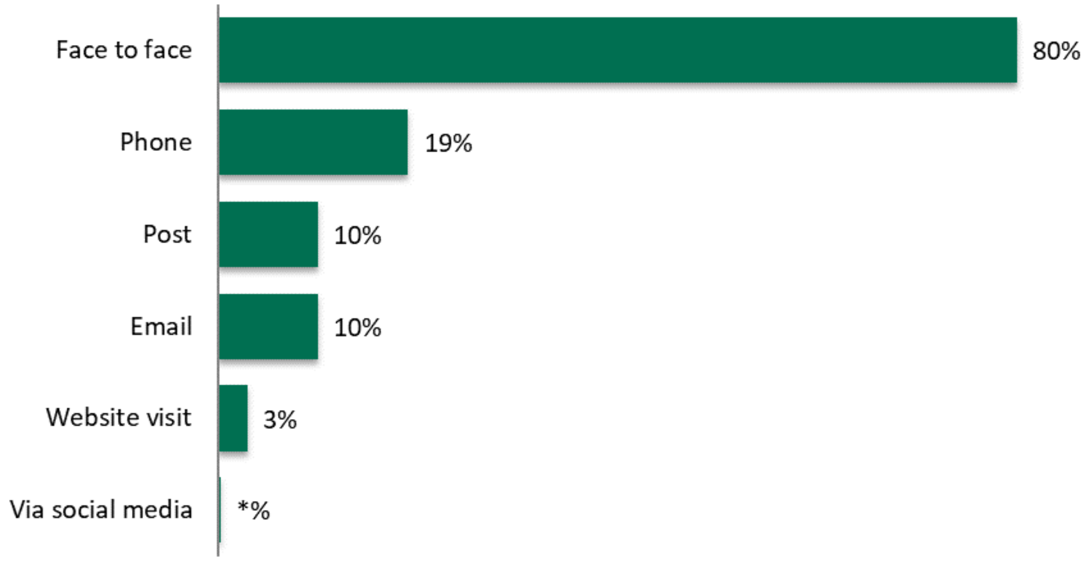
C11. In the last 12 months, have you had any contact with 'your local authority/your district council/the Department of Agriculture, Environment and Rural Affairs (DAERA)^? for example, the Environmental Health Officer or inspector, with regard to food safety or hygiene issues? This could have been by phone, post, email, by visiting their website or face to face.

Figures in bold are statistically significantly higher than the total minus the sub-group tested to a 95% confidence level

Contact is most likely to have been face to face i.e. via inspections (80%; 84% in 2018). This increases to 88% of low FHRS rated FBOs (where have an FHRS rating of 0-2) but also within organisations that have a good but not excellent rating (84% where have an FHRS rating of 5).

Telephone is the next most frequently cited mode of contact (19%), while post and email are in equal third place (10% in each case).

Figure 11: Modes of contact with local authority/district council/DAERA with regard to food safety or hygiene issues in the last 12 months – prompted, multiple response (where had contact)



Unweighted sample base = 328 * denotes less than 0.5%

C12. Was this by ...?

Respondents within primary food production are more likely than those in other sectors to have been in contact with their local authority/district council/DAERA by phone (45%) and/or email (28%), as well as face to face (85%).

Ratings of contact with local authority/council/DAERA

The 46% of respondents whose FBOs have had contact with their local authority/council/DAERA involving *more than* just a visit to the website were asked to rate their contact with these organisations on a number of aspects.

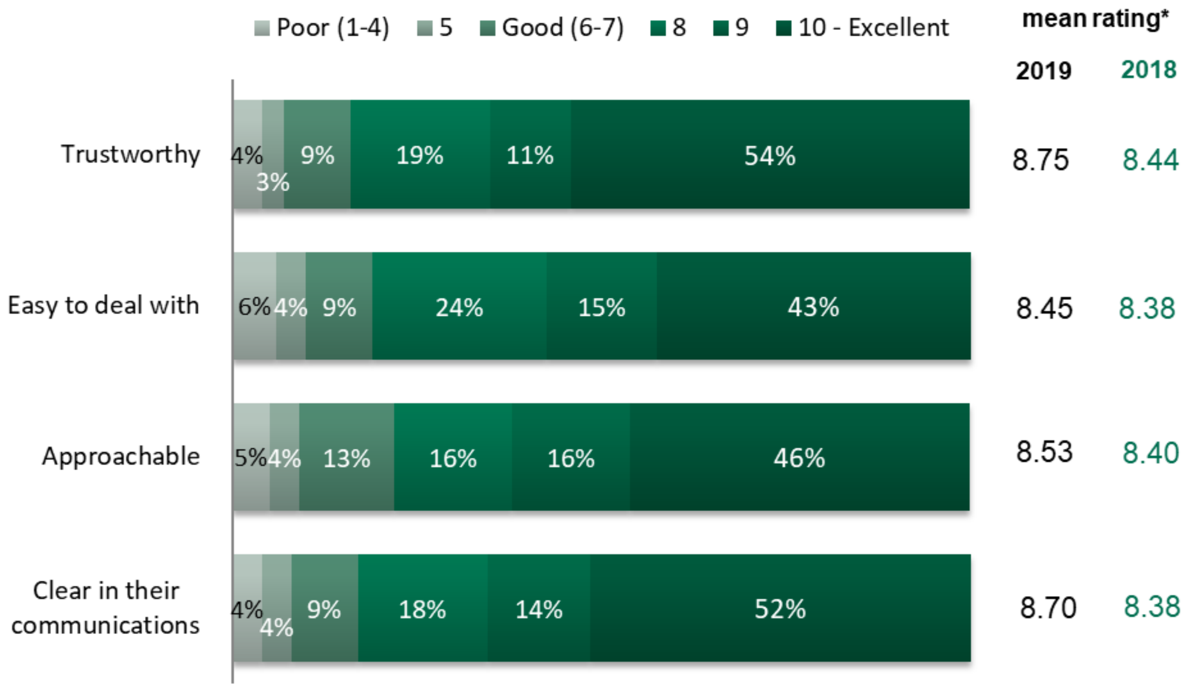
The aspects included:

- Trustworthiness;
- Ease of dealing with the organisation;
- How approachable the organisation was;
- Clarity of communications from the organisations.

As in 2018, between two-fifths and a half of respondents rate their local authority/council/DAERA as excellent on all aspects, while around one in twenty rate the contact on these aspects as poor.

Ratings are summarised in the figure below. A ten-point scale was used, where 1 is very poor and 10 is excellent.

Figure 12: Ratings of contact with local authority/district council/DAERA on specified service aspects – on a 10 point scale, where 1 is very poor and 10 is excellent (where had contact but not through website visits only)



Unweighted sample base; 323

* mean rating, based on where provided a response between 1 and 10

C13. Based on your recent contact with your local authority/ council/DAERA, how would you rate it on the following service aspects...?

Trustworthiness

Overall, 84% of respondents that have had contact with their local authority/council/DAERA rated it at 8 and above on the scale of 1-10 for trustworthiness. This includes 54% that rate these agencies at 10 – excellent. At the other end of the scale, just 4% rate them as poor (1-4).

Compared with 2018 there has been an increase in the propensity to rate the local authority/council/DAERA highly for trustworthiness, as 79% in 2018 rated them at 8 or above; 48% as excellent.

Respondents in Wales are significantly more likely than average to rate these agencies as excellent with regard to trustworthiness (70%), while the proportion that rate these agencies at 8 or above for this quality is high in Northern Ireland than elsewhere (92%).

Ease of dealings

Overall, 81% of respondents that have had contact with their local authority/council/DAERA rated it at 8 and above on the scale of 1-10 for being easy to deal with. This includes 43% that rate these agencies at 10 – excellent. At the other end of the scale, just 7% rate them as poor (1-4).

This compares with 78% that gave their local authority/council/DAERA rated it at 8 and above in 2018, when a similar proportion gave these agencies the highest possible rating on this aspect then (44%).

Again, respondents in Wales are significantly more likely than average to rate these agencies as excellent with regard to ease of dealing with them (53%). Small businesses are significantly more likely than micro businesses to rate these agencies as excellent in terms of being easy to deal with (51%, compared with 40%).

Respondents within businesses that serve the public directly tend to be more likely to be satisfied with their local authority/council/DAERA in this respect (82% rate it at 8 and above; compared with 65% where they do not deal with the public directly).

While few respondents in low FHRS rated businesses rated the local authority/council/DAERA as poor on the ease of dealing with them, the proportion that rated them as very good/excellent is much lower than among respondents in better FHRS rated businesses (54% of those with an FHRS rating of 0-2, compared with 88% of those with a 3+ FHRS rating).

Approachable

Overall, 78% of respondents that have had contact with their local authority/council/DAERA rated it at 8 and above on the scale of 1-10 for being approachable. This includes 46% that rate these agencies at 10 – excellent. At the other end of the scale, just 5% rate them as poor (1-4). This represents little change since 2018 (79% rated the agencies at 8 and above; 45% at 10; 7% as poor).

Respondents in small businesses are more likely than those in micro businesses to rate their local authority/council/DAERA at 8 or above as approachable (89% where there are 10-49 employees; 74% where there are fewer than 10 employees). Longer established businesses are less likely than average to rate their local authority/council/DAERA as approachable, with around one in six giving a rating of 6 or 7 (17% of those established for 5+ years, compared with 4% of newer businesses) and around three in four giving a rating of 8 or above, compared with four in five newer businesses.

Only around half of respondents in low performing FHRS rated (0-2) businesses (54%) rate their local authority/council/DAERA as very good/excellent on this aspect.

Clarity of communications

Overall, 83% if respondents that have had contact with their local authority/council/DAERA rated it at 8 and above on the scale of 1-10 for being clear in their communications. This includes 52% that rate these agencies at 10 – excellent for this. At the other end of the scale, just 4% rate them as poor (1-4).

This represents an improvement compared with 2018 when 76% of respondents rated their local authority/council/DAERA at 8 and above for this aspect of their dealings with them, including 46% that rated them at 10. A similar proportion in 2018 rated them as poor (5%).

Respondents in Wales and Northern Ireland are more likely than those in England to rate their local authority/council/DAERA as very good/excellent (8-10) with regard to this aspect of their service (88% and 92% respectively). Respondents in food and beverage services and accommodation businesses are also significantly more likely than average to be very satisfied with this aspect of their communication with their local authority/council (87% and 86% respectively).

Respondents in low performing FHRS rated businesses (0-2 rating) are significantly less likely than those in higher rated businesses to rate the clarity of communications with their local authority/council/DAERA (76%, compared with 86% of 3+ FHRS rated businesses).

Respondents within businesses that fall outside of the FHRS scheme are more likely than average to rate their local authority/council/DAERA as poor in terms of how clear they are in their communications (16% of those with no rating, compared with 4%) and primary food producers mainly contribute to this (31% rating this as poor).

Ease of obtaining all information needed

When asked how easy it was to obtain all the information needed from their local authority/council/DAERA, most respondents that have had any contact (excluding those that have only visited the website) (88%) considered it had been easy. This included 54% that found it very easy. This compares with 87% and 65% respectively in 2018.

Just 6% have found it difficult to obtain all the information they need from their local authority/council/ DAERA (7% in 2018). This increases to one in nine respondents within businesses that do not have an FHRS rating, i.e. that fall outside of this scheme (11%).

FSA

This chapter reports levels of awareness of the FSA and use of its services. Perceptions of the FSA among those aware of it are explored.

Summary: FSA
The vast majority of respondents have heard of the FSA (97%) but few (just 5%) of these have had contact with the FSA via the helpline, social media for some other way in the last 12 months.
Two-fifths of respondents that have heard of the FSA (39%) have visited the website.
There is a high level of (self-reported) understanding of the FSA's role and respondents rate the FSA highly for being trustworthy, clear in their communications, approachable and easy to deal with. When focusing on respondents that have had dealings with the FSA via a medium other than its website, the positive ratings are higher still.
Combining views on statements about the FSA and the degree of trust and respect that respondents have in them, more than three-fifths of respondents that are aware of the FSA (62%) have overall trust in it. One in four (24%) has a high level of trust overall of the FSA.
Ratings of the FSA in respect of service aspects and the role they play within the food and drink industry, as well as levels of trust, have improved in the last 12 months.

Awareness of the FSA

In total 97% of respondents had heard of the FSA prior to taking part in the survey interview. This is a slight increase compared with 2018 (94%). This proportion is slightly lower than average amongst newly established businesses (88% of those established in the last year – although a very small base) but otherwise, there are very high levels of awareness of the FSA across the board.

Just 5% of respondents that are aware of the FSA (equating to – rounding up to - 5% of all respondents as the vast majority of respondents are aware of the FSA) report their business having had contact with the FSA in the last 12 months via the helpline (2%); social media (1%) or in some other way (1%)[13]. A further 39% of respondents that are aware of the FSA (38% of all respondents) have visited the FSA website.

Businesses that sell direct to the public are significantly more likely than those that do not to have had contact with the FSA in the last 12 months (45%, compared with 25%), but nearly twice as likely to have visited the website (42%, compared with 24%), while few have contacted the FSA in any other way, including via the helpline or social media. Respondents within businesses that have a low FHRS rating are less likely than those in higher rated businesses to have had contact with the FSA (29% of those rated 0-2, compared with 50% of those rated 3+), but, again, most of the contact made by higher rated businesses is via the website (47%). See [14] (Annex 1) for more detail.

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[13] The proportion in 2018 was 9%. However, a relatively large proportion of these cited face to face contact with the FSA and given that this tends not to be a typical way of contacting the FSA it was felt that these respondents may not have been accurate in their recall. In 2019 the question explicitly asked about contact via the website, helpline or social media i.e. the typical ways of making contact.

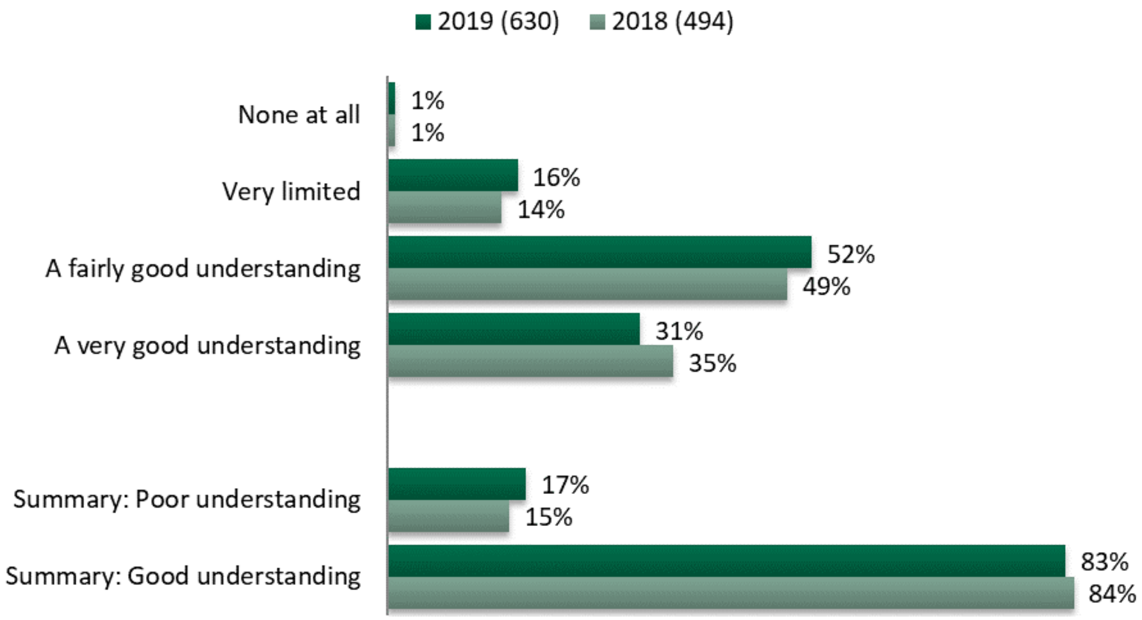
[14] [CTRL + CLICK] on blue text to go to detailed information if viewing digitally.

Understanding of the FSA's role

The vast majority of respondents that are aware of the FSA feel they have at least a fairly good understanding of the FSA's role (83%; 84% in 2018). This includes 31% that feel they have a very good understanding of its role.

The figure that follows highlights little change since 2018.

Figure 13: Respondents' perception of their understanding of the role of the Food Standards Agency (where aware of the FSA)



Unweighted sample bases in parentheses

C6. How good an understanding would you say that you have of the role of the Food Standards Agency? Would you say it was ...

The propensity to perceive their understanding of the FSA's role as very good is significantly higher among respondents in businesses that directly serve the public than among those in businesses that do not (33%, compared with 23%). This is reflected in the higher than average proportion of respondents within food and beverage services businesses that feel they have a very good understanding of the FSA's role (35%). One in four respondents in businesses that do not directly serve the public (25%) feel their understanding is very limited. The proportion is particularly high among respondents in primary food producers (29%), as well as among respondents in specialist retail businesses (30%).

Among respondents that handle food themselves, the level of understanding (as they perceive it) is significantly higher than among those that do not directly handle food (86% have a good understanding, compared with 76%).

There is little difference by FHRS rating.

Ratings of contact with the FSA

The 40% of respondents whose businesses have had contact with the FSA (including those that have only had contact via the website[15]) were asked to rate the FSA, based on their contact with it, on a number of aspects.

The aspects included:

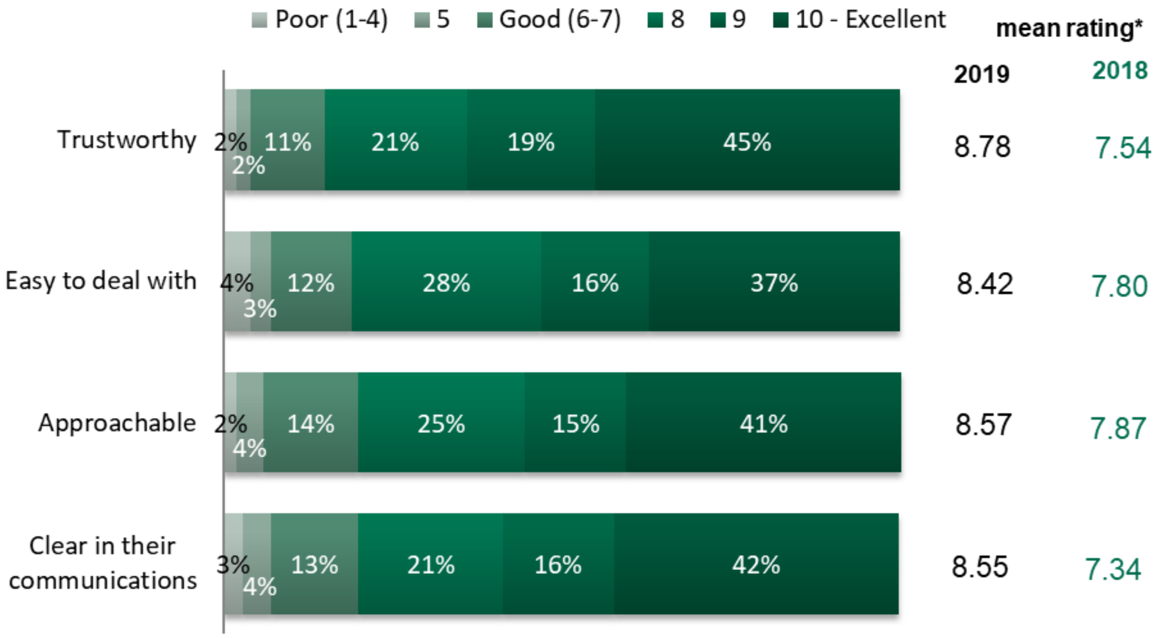
- Trustworthiness;
- Ease of dealing with the FSA;
- How approachable the FSA was;
- Clarity of communications from the FSA.

Around two-fifths of respondents rate the FSA as excellent on all aspects, while fewer than one in twenty rate the FSA on these aspects as poor.

Ratings are summarised in the figure below. A ten-point scale was used, where 1 is very poor and 10 is excellent.

[15] In 2018, these website only respondents were excluded from this request to rate the FSA. For comparison purposes there is additional analysis included based on where had helpline, social media or other contact with the FSA with these respondents excluded.

Figure 14: Ratings of the FSA on specified service aspects – on a 10 point scale, where 1 is very poor and 10 is excellent (where had contact with the FSA)



Unweighted sample base; 286

* mean rating, based on where provided a response between 1 and 10

C8. Based on your recent contact with the FSA, how would you rate it on the following service aspects...?

Trustworthiness

More than four-fifths of respondents that have had contact with the FSA (85%) rated the FSA at 8 and above on the scale of 1-10 for trustworthiness. This includes 45% that rated it at 10 – excellent. Only 2% gave a poor rating (1-4).

Respondents in businesses that sell directly to the public are significantly more likely than those that are in businesses that do not to rate the FSA at 8 and above for trustworthiness (86%, compared with 74%). This is most likely the case because within businesses that do not sell directly to the public respondents are more likely to have a neutral view (11%, compared with 1%).

Although the sample base is very low, contrary to the views expressed in 2018, respondents in businesses that have a low FHRS rating (of 0-2) that have had contact with the FSA all rate it at 8 or above for trustworthiness.

The views of respondents that have contacted the FSA via the helpline or social media (not just via the website) are very positive, with nearly all (96%) rating the FSA at 8 or more for being trustworthy. Half the respondents that have had direct contact with the FSA rate it as excellent (10) for being trustworthy (51%).

Ease of dealings

Overall, 81% of respondents that have had contact with the FSA rated it at 8 and above on the scale of 1-10 for being easy to deal with. This includes 37% that rate the FSA at 10 i.e. excellent. At the other end of the scale, just 4% rate the FSA as poor (1-4).

Respondents in Northern Ireland are more likely than those in England and Wales to rate the FSA as excellent (10) (63%, compared with 35% and 33% respectively).   This proportion is also significantly higher than average among respondents in food and beverage services organisations (42%).

While due to the significant size of the food and beverage services group in the population of those that have had contact with the FSA in the last 12 months they account for most of the respondents who rate the FSA as poor with regard to the ease of dealing with them (8 out of 10 weighted cases), as a proportion of all by sector, those giving a poor rating account for a significantly higher proportion of manufacturers (11%). Nearly all those giving the FSA a poor rating for being easy to deal with are micro (less than 10 employees) rather than small (10-49 employees) businesses.

Nearly all those that have contacted the FSA via the helpline or social media (not just via the website) rate the FSA at 8 or more for being easy to deal with (96% do). Fifty-seven per cent rate the FSA as excellent (10) for being easy to deal with.

Approachable

Overall, 81% of respondents that have had contact with the FSA rated it at 8 and above on the scale of 1-10 for being approachable. This includes 41% that rate it at 10 – excellent. Just 2% rated them as poor (1-4).

Again, most of those rating the FSA as poor for being approachable are micro (less than 10 employees) rather than small (10-49 employees) businesses (4 of the 5 weighted cases). There are no indications of low performing (low FHRS rated) businesses finding the FSA less approachable than those that are higher rated this year.

All but one respondent that has contacted the FSA via the helpline or social media (not just via the website) rate the FSA at 8 or more for being approachable (99%, including 56% that rate the FSA as excellent - 10).

Clarity of communications

Overall, 80% of respondents that have had contact with the FSA rated the FSA at 8 and above on the scale of 1-10 for being clear in its communications. This includes 42% that rate the FSA at 10 – excellent for this. Just 3% rate them as poor (1-4) in this respect.

A third of respondents working within primary food producers that have had contact with the FSA (32%) rated them as poor for clarity of communications. And again, most of the dissatisfied are micro businesses (7 of the 8 weighted cases).

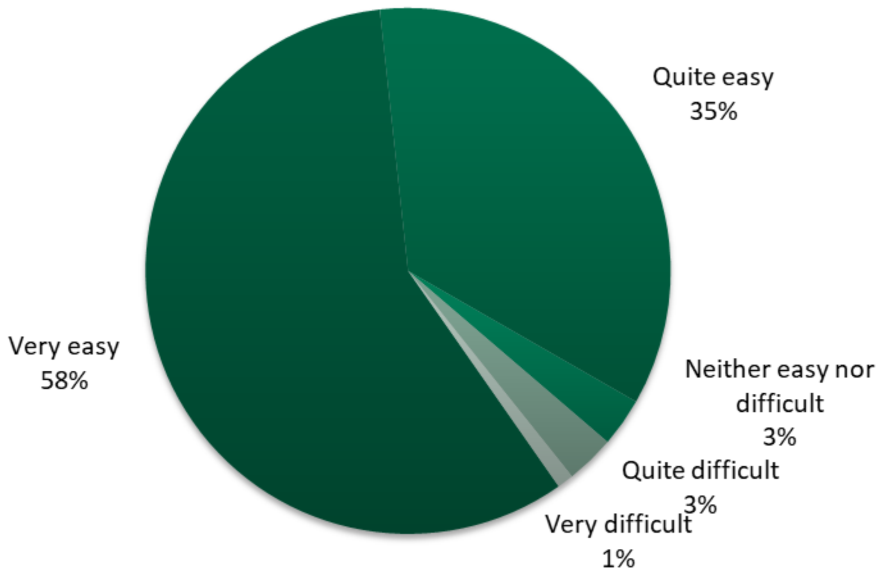
The views of respondents that have contacted the FSA via the helpline or social media (not just via the website) with regard to the clarity of communications are very positive, with the vast majority (92%) rating the FSA at 8 or more on this aspect of the contact. Sixty-two per cent of these respondents rate the FSA as excellent (10) for clarity of communication.

Ease of obtaining all information needed

When asked how easy it was to obtain all the information needed from the FSA, most respondents that have had any contact (including those that have only visited the website) (93%) considered it to have been easy. This included 58% that found it very easy. This represents an improvement on 12 months ago, when 81% of respondents had found obtaining all the information they needed easy including 41% that had found it very easy.

Just 5% have found it difficult to obtain all the information they need from the FSA. This compares with 15% in 2018. This increases to one in six (18%) of respondents within manufacturing businesses and 10% of respondents in businesses that have no FHRS rating i.e. mainly those that fall outside of the FHRS rating scheme.

Figure 15: Ease of obtaining all the information needed from the FSA (where had contact)



Unweighted sample base = 286

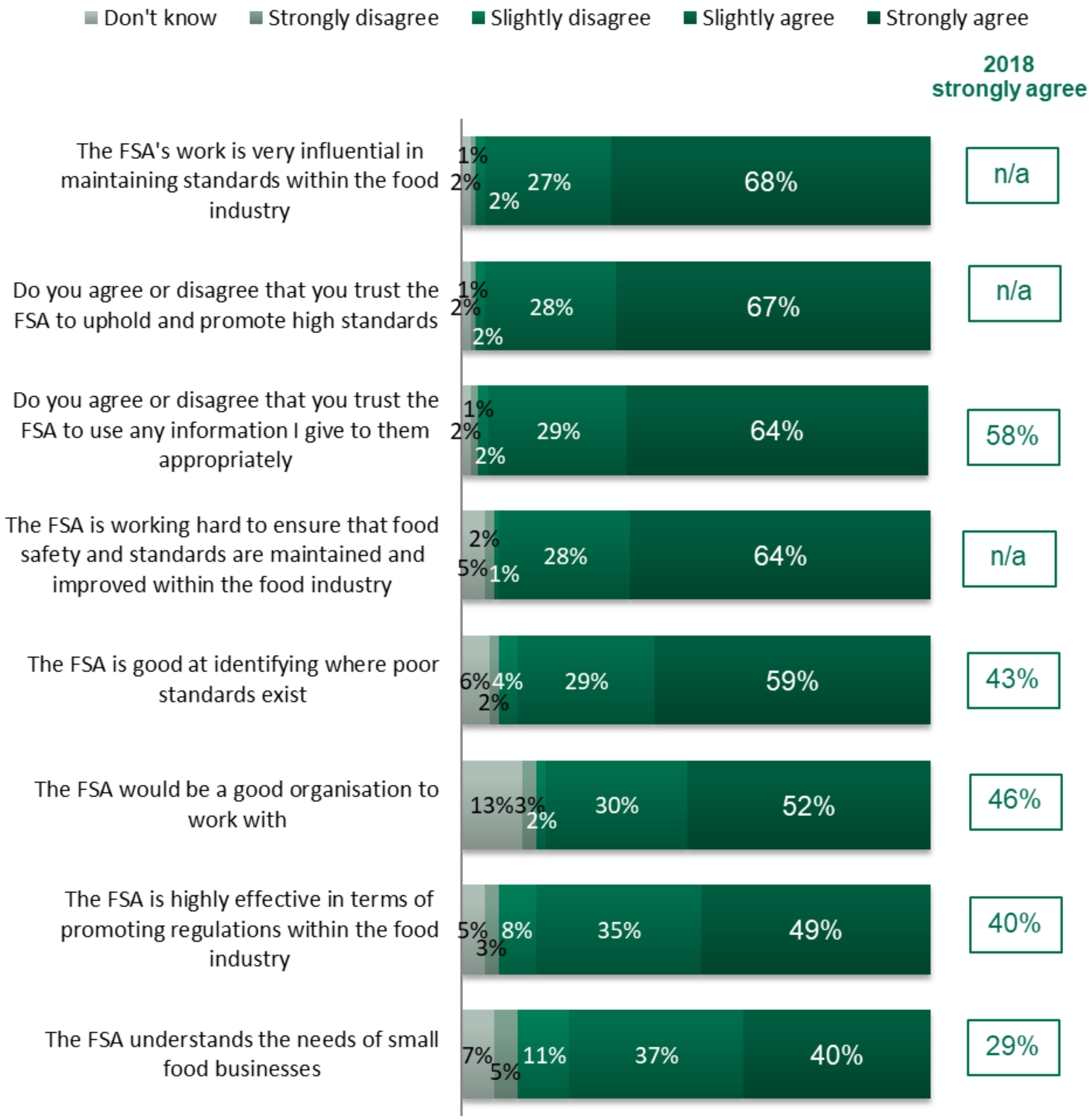
C9. How easy was it to obtain all the information you needed from the FSA?

Perceptions of and trust in the FSA

Respondents aware of the FSA prior to being called to participate in the survey (97% of all respondents), were asked to indicate the extent to which they agree or disagree with a number of statements about the FSA. These statements revolve around how influential and effective the FSA are; the value of what the FSA do; the profile of the FSA within the industry and the trust placed in the FSA.

Their responses are summarised in the figure that follows.

Figure 16: Extent to which respondents agree or disagree with statements about the FSA and what it does (where aware of FSA)



Unweighted sample base = 630

C10. I'm now going to read out a few statements about the FSA and what it does and I'd like you to tell me the extent to which you agree or disagree with each statement. *n/a = not asked in 2018*

There is particularly strong agreement with statements about trust in the FSA; 94% agree that **they trust the FSA to use any information they give the FSA appropriately**, including 64% that strongly agree (compared with 90% and 58% in 2018 respectively);

95% agree that **they trust the FSA to uphold and promote high standards**[16], including 67% that strongly agree.

Only slightly fewer respondents agree that **the FSA is working hard to improve the food industry for all of us** (92%, including 64% that strongly agree, compared with 86% and 52% in 2018 respectively), while slightly fewer again agree that **the FSA is good at identifying where poor standards exist** (88%, including 59% that agree strongly, compared with 80% and 43% in 2018 respectively); **that the FSA is highly effective in terms of promoting regulation within the food industry**[17] (84%, including 49% that strongly agree) and **that the FSA would be a good organisation to work with** (82%, including 52% that strongly agree, compared with 81% and 46% respectively).

Respondents are least likely to agree that **the FSA understands the needs of small businesses** (78%, including 40% that strongly agree, compared with 69% and 29% in 2018 respectively). The proportion that agree, however, is still relatively high and there is significant improvement highlighted in this indicator year on year.

Nearly all respondents that are aware of the FSA agree that **the FSA's work is very influential in maintaining standards within the food industry**[18] (95%, including 68% that strongly agree).

The FSA's work is very influential in maintaining standards

Nearly all respondents that are aware of the FSA (95%) agree with the statement that the FSA's work is very high profile. Two-thirds (68%) strongly agrees.

Respondents within small businesses (98% of those with 10-49 employees) are significantly more likely to agree than those in micro businesses (94% of those with less than 10 employees).

Respondents in food and beverage services businesses are significantly more likely to agree with this statement (97%) and 75% of respondents in these businesses strongly agree that the FSA's work is very influential.

Just 2% disagree that the FSA's work is very influential, but this proportion increases to 8% among respondents working in primary food producers or manufacturing businesses. These views are of little significance overall but indicative that businesses in these sectors see the FSA's work as being of less relevance to them.

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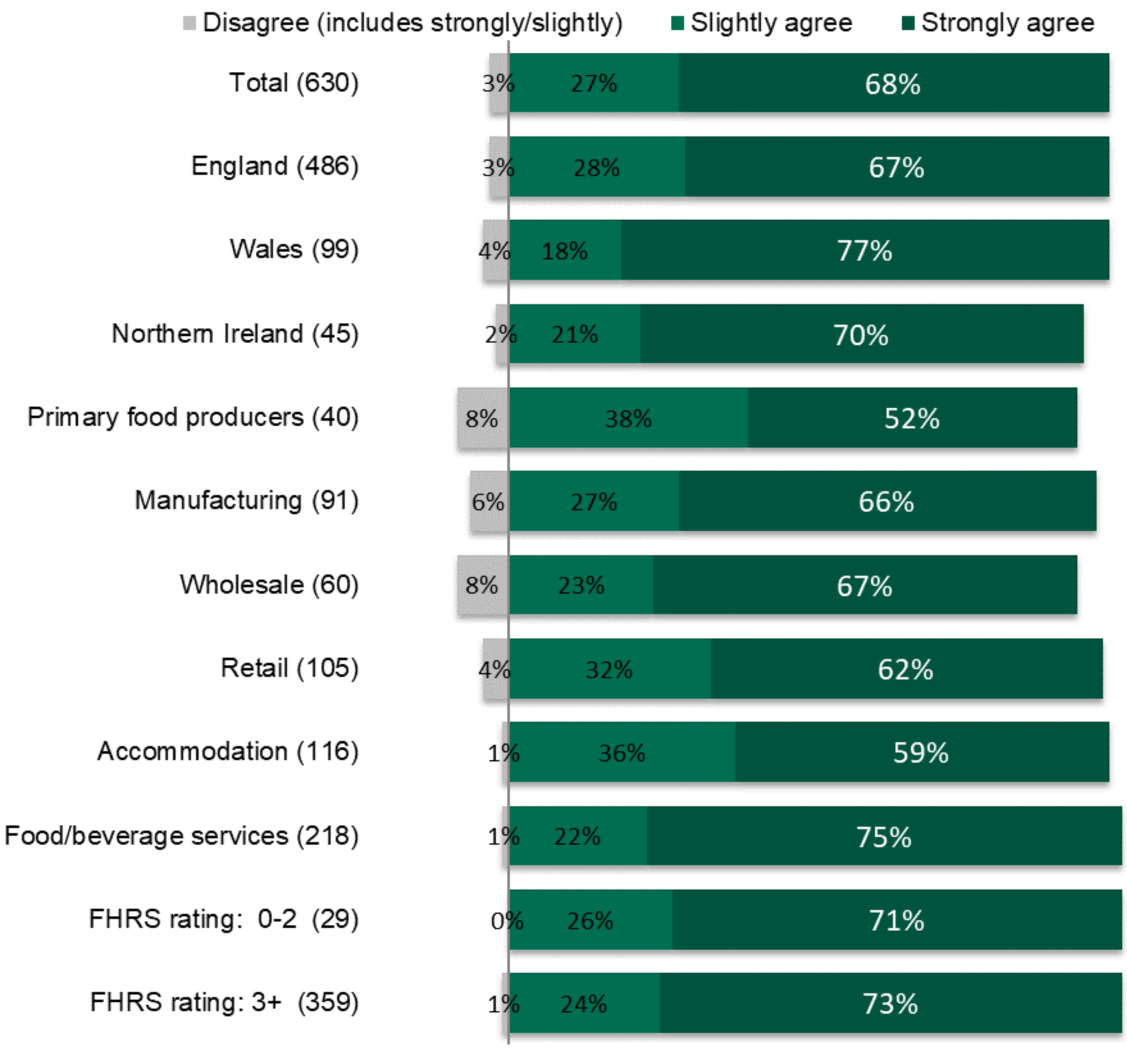
[16] A new statement for 2019
[17] A significant change in wording between 2018 and 2019
[18] A new statement for 2019

Figure 17: Extent to which respondents agree or disagree that the FSA's work is very influential in maintaining standards within the food industry (where aware of FSA)



Unweighted sample bases in parentheses. *Bars' do not add to 100% as % of 'don't know' responses not shown*

C10. I'm now going to read out a few statements about the FSA and what it does and I'd like you to tell me the extent to which you agree or disagree with each statement.

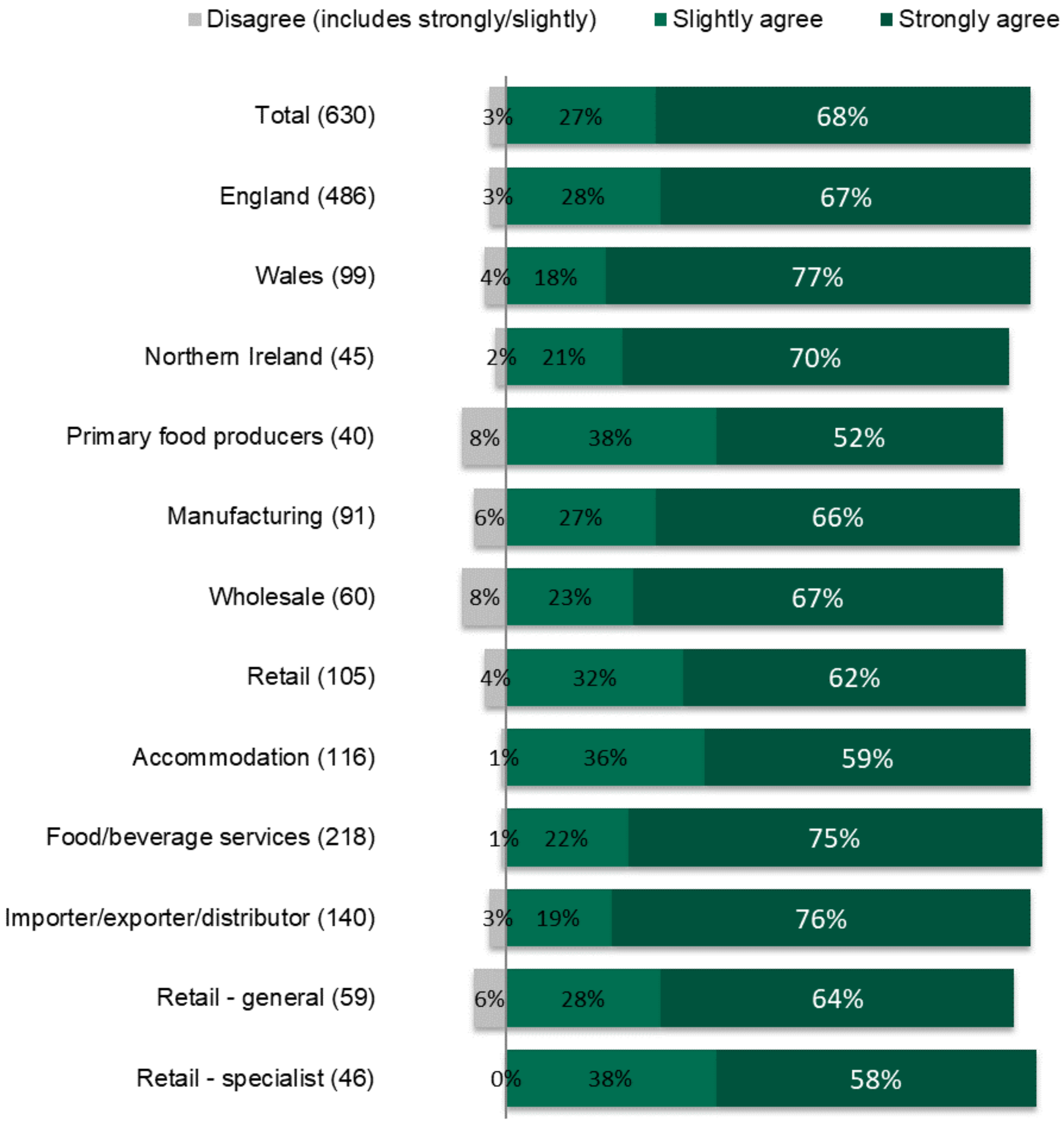
The FSA is good at identifying where poor standards exist

More than four-fifths of respondents that are aware of the FSA (88%) agree with the statement that the FSA is good at identifying where poor standards exist. Around three-fifths (59%) strongly agree.

Respondents within businesses in the food and beverage services sector are significantly more likely to agree with this statement (93%), including 66% that strongly agree.

Just 5% of respondents that are aware of the FSA disagree that the FSA is good at identifying where poor standards exist. This proportion increases to 14% within the manufacturing sector and 11% among respondents in wholesale businesses.

Figure 18: Extent to which respondents agree or disagree that the FSA is good at identifying where poor standards exist (where aware of FSA)



Unweighted sample bases in parentheses. *'Bars' do not add to 100% as % of 'don't know' responses not shown.*

C10. I'm now going to read out a few statements about the FSA and what it does and I'd like you to tell me the extent to which you agree or disagree with each statement.

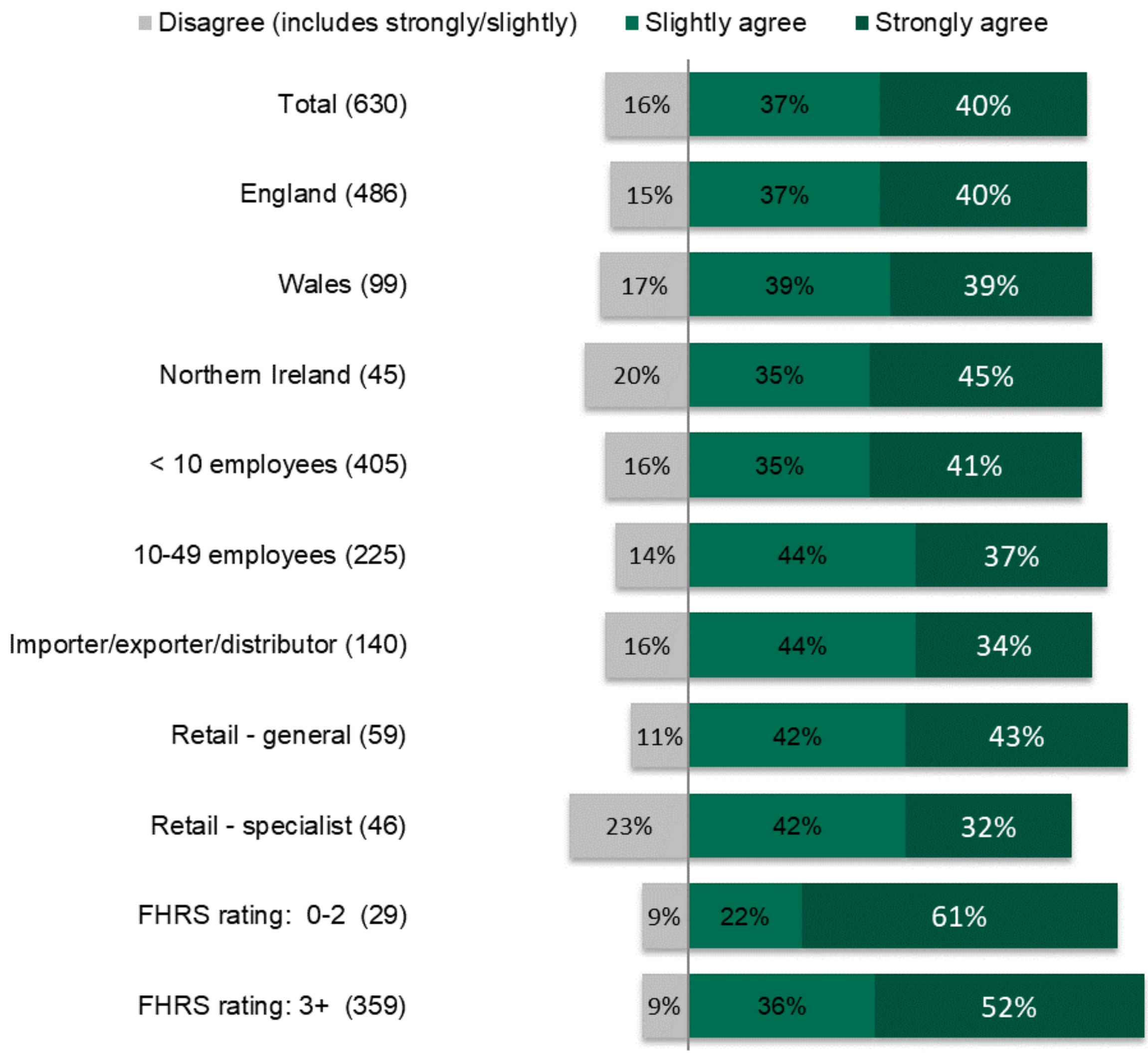
The FSA understands the needs of small FBOs

More than three-quarters of respondents that are aware of the FSA (78%) agree with the statement that the FSA understands the needs of small FBOs. Two-fifths (40%) strongly agrees.

Respondents within single site businesses are more likely than those that have more than one site to agree this is the case (79%, compared with 54%), while there are no significant differences in opinion by organisation size. Respondents working in primary food producers are least likely to agree (67%), while this is also reflected in the fact that agreement is higher among respondents that work within businesses that sell direct to the public than among those that work in businesses that do not (80%, compared with 67%).

One in six respondents that are aware of the FSA (16%) disagree that the FSA understands the needs of small businesses. This increases to 31% of multi-site businesses.

Figure 19: Extent to which respondents agree or disagree that the FSA understands the needs of small businesses (where aware of FSA)



Unweighted sample bases in parentheses. *'Bars' do not add to 100% as % of 'don't know' responses not shown.*

C10. I'm now going to read out a few statements about the FSA and what it does and I'd like you to tell me the extent to which you agree or disagree with each statement.

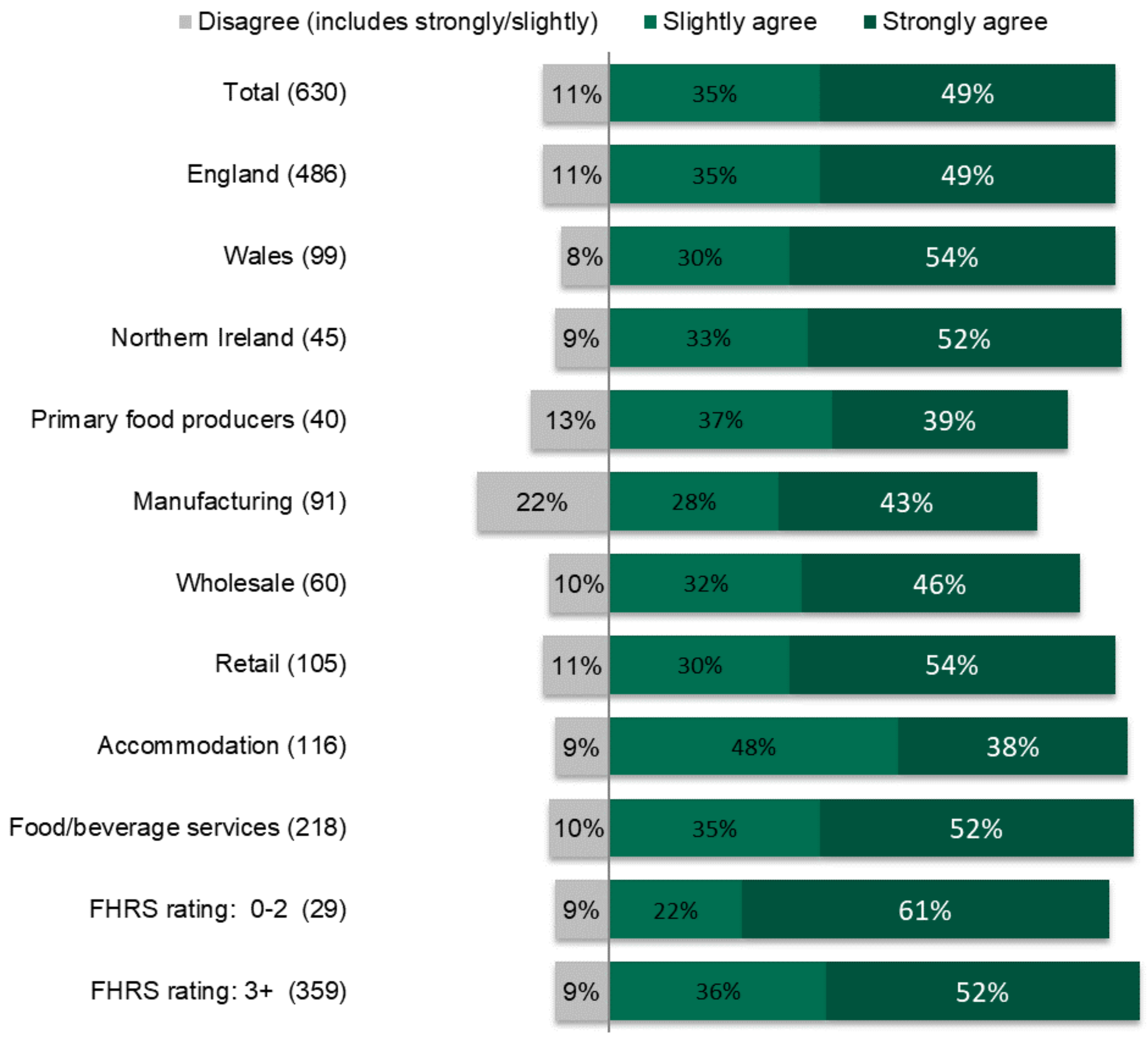
The FSA is highly effective in terms of promoting regulations within the food industry

More than four-fifths of respondents that are aware of the FSA (84%) agree with the statement that the FSA is highly effective in terms of promoting regulations within the food industry. Around half (49%) strongly agree. One in nine respondents that are aware of the FSA (11%) disagree that the FSA is highly effective in this respect.

Respondents within micro businesses are significantly more likely than those in small businesses to disagree with this statement (12% where there are less than 10 employees, compared with 6% where there are between 10 and 49 employees). However, respondents in multi-site businesses are significantly more likely than average to strongly agree that the FSA is highly effective in promoting regulations (68%).

Respondents within food and beverage services and accommodation businesses are significantly more likely to agree with this statement than average (87% and 86% respectively), with respondents in sectors less likely to be public-facing less likely to agree. This concerns manufacturers in particular (71% agree; 22% disagree), while only 76% of respondents in primary food producers and 79% of those in the wholesale sector agree. As one would expect given these sector differences, respondents in businesses that sell directly to the public are significantly more likely to agree with this statement than those in businesses that do not sell directly (87%, compared with 70%),

Figure 20: Extent to which respondents agree or disagree that the FSA is highly effective in terms of promoting regulations within the food industry (where aware of FSA)



Unweighted sample bases in parentheses. *'Bars' do not add to 100% as % of 'don't know' responses not shown.*

C10. I'm now going to read out a few statements about the FSA and what it does and I'd like you to tell me the extent to which you agree or disagree with each statement.

The FSA would be a good organisation to work with

Around four-fifths of respondents that are aware of the FSA (82%) agree with the statement that the FSA would be a good organisation to work with. Just over half (52%) strongly agree.

Respondents within Northern Ireland are significantly more likely than respondents in England and Wales to agree that the FSA would be a good organisation to work with

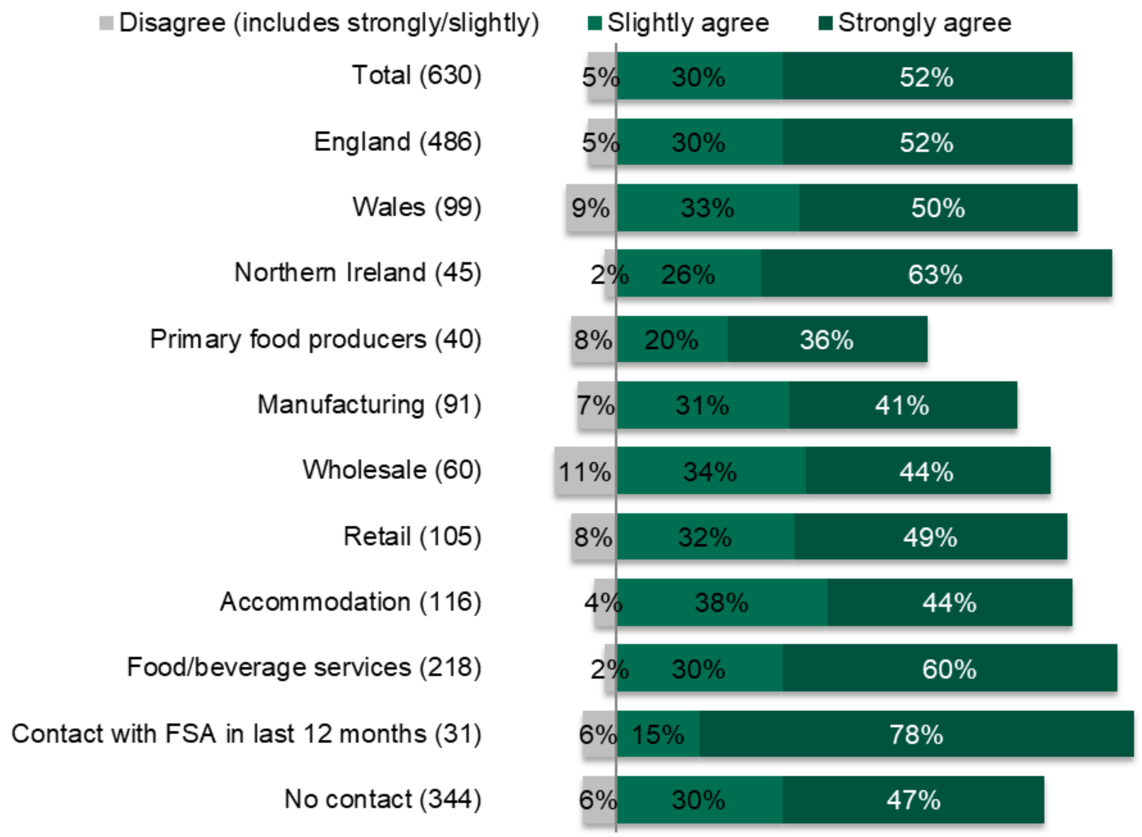
(89%, compared with 82% and 83% respectively). More than three-fifths of respondents in Northern Ireland strongly agree (63%), compared with around half of those based in England and Wales (52% and 50%).

Respondents within food and beverage services businesses are significantly more likely to agree with this statement than average (91%), with primary food producers least likely to (57%). In the primary food production and manufacturing sectors there is greater uncertainty regarding this statement, with 36% of respondents in primary food production and 21% of those in manufacturing unsure of their opinion.

Respondents reporting recent contact with the FSA and, therefore, direct experience of the FSA as a an organisation to work with, are significantly more likely than those that have had no contact, to agree that the FSA would be a good organisation to work with (90%, compared with 76%; 61% strongly agreeing, compared with 47%).

Overall, just 5% of respondents disagree that the FSA would be good organisation to work with.

Figure 21: Extent to which respondents agree or disagree that the FSA would be a good organisation to work with (where aware of FSA)



Unweighted sample bases in parentheses. *'Bars' do not add to 100% as % of 'don't know' responses not shown.* C10. I'm now going to read out a few statements about the

FSA and what it does and I'd like you to tell me the extent to which you agree or disagree with each statement.

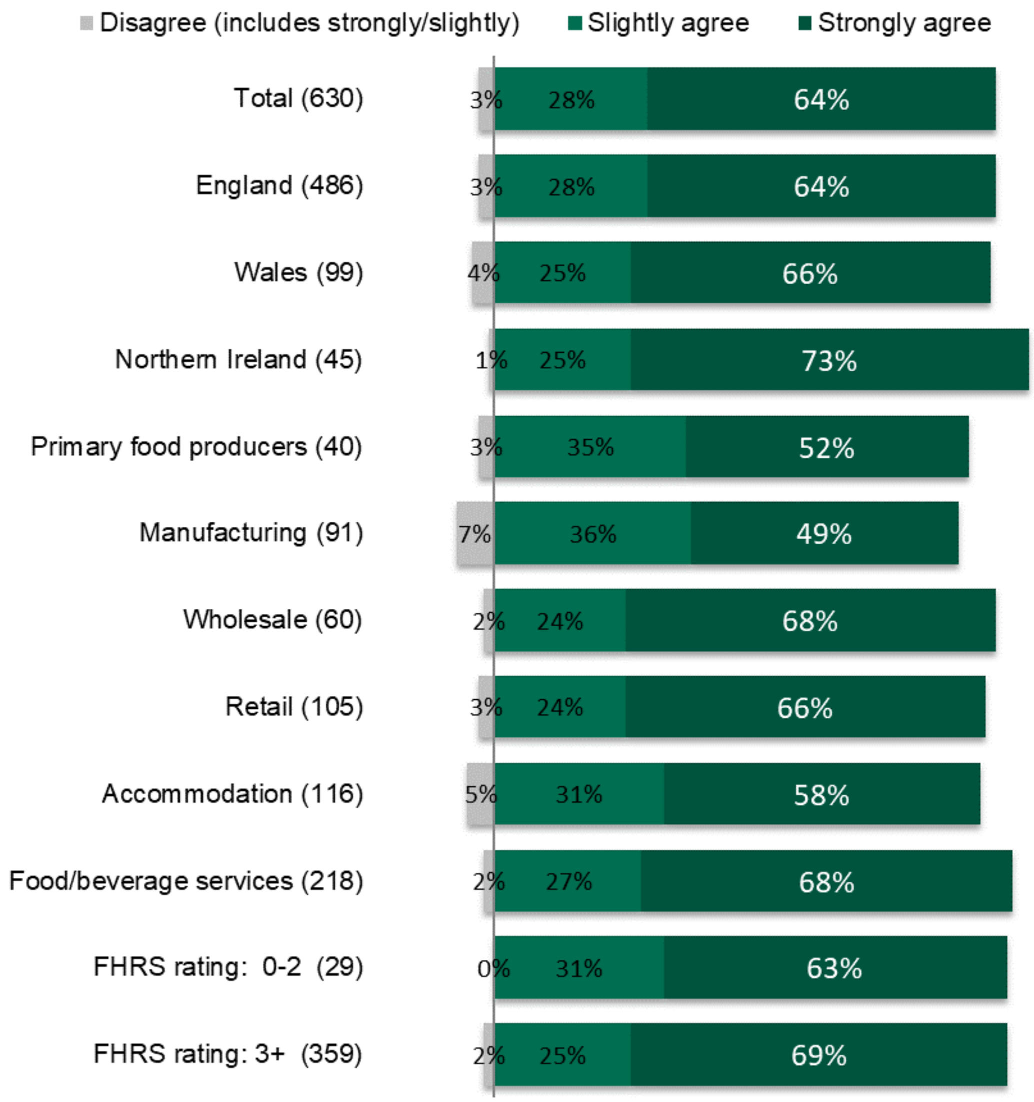
The FSA is working hard to ensure that food safety and standards are maintained and improved within the food industry

More than nine in ten respondents that are aware of the FSA (92%) agree with the statement that the FSA is working hard to ensure that food safety and standards are maintained and improved within the food industry. Nearly two-thirds (64%) strongly agree.

The proportion that strongly agrees with this statement is particularly high within Northern Ireland (73%) and among respondents that have contacted the FSA in the last 12 months (71%).

Respondents within food and beverage services businesses are significantly more likely than average to agree with this statement than average (95%), and also to strongly agree (68%), with manufacturers least likely to agree (85%; 49% strongly agreeing).

Figure 22: Extent to which respondents agree or disagree that the FSA is working hard to ensure that food safety and standards are maintained and improved within the food industry (where aware of FSA)



Unweighted sample bases in parentheses. *'Bars' do not add to 100% as % of 'don't know' responses not shown.*

C10. I'm now going to read out a few statements about the FSA and what it does and I'd like you to tell me the extent to which you agree or disagree with each statement.

Trust in the FSA

Respondents who were aware of the FSA prior to their survey interview were asked two questions about whether they trust the FSA to uphold and promote high standards and to use any information they provide to the FSA appropriately.

Trusting the FSA to uphold and promote high standards

The vast majority of respondents aware of the FSA (95%) agree that they trust the FSA to uphold and promote high standards. This includes 67% that strongly agree.

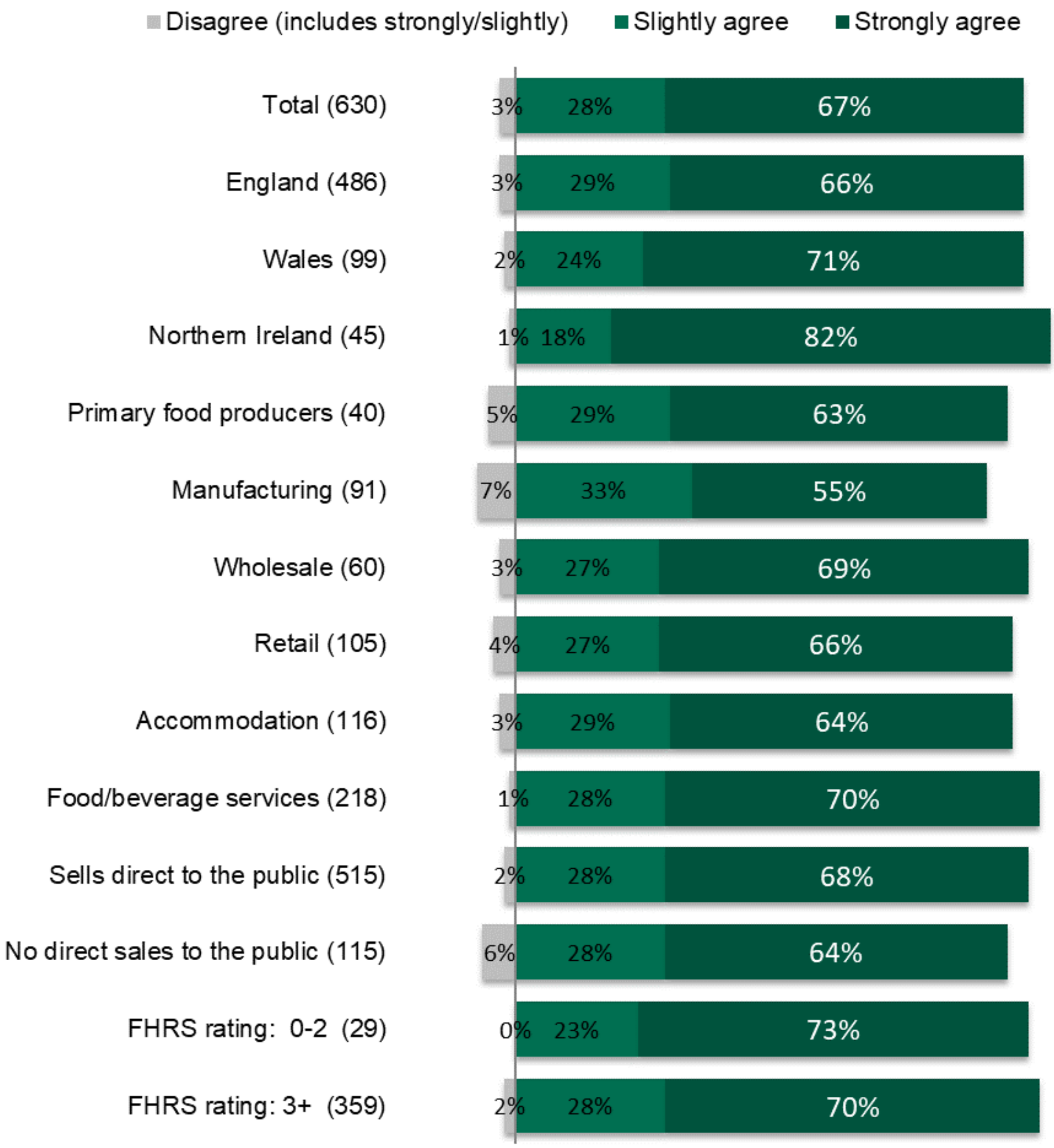
Respondents in Northern Ireland are significantly more likely to strongly agree with this statement (82%). Respondents in small businesses are more likely than those in micro businesses to agree that they trust the FSA in this way (99% where there are 10-49 employees, compared with 94% of where there are less than 10 employees).

Respondents within food and beverage services businesses are significantly more likely than average to trust the FSA to uphold and promote high standards (98%) and this is reflected in the extent to which respondents in businesses that serve the public directly agree that they do (96%).

There is a high degree of trust across businesses at all levels of FHRS rating, with 73% of respondents in businesses that have low FHRS rating of 0-2 strongly agreeing that they trust the FSA to uphold and promote high standards. This compares with 70% of those within a business that has an FHRS rating of 3+.

Overall, just 3% of respondents aware of the FSA disagree that they trust the FSA to uphold and promote high standards. The proportion that strongly disagrees is higher than average among respondents that do not directly handle food (6%) and among respondents in the manufacturing sector (7%).

Figure 23: Extent to which respondents agree or disagree that they trust the FSA to uphold and promote high standards (where aware of FSA)



Unweighted sample bases in parentheses. *'Bars' do not add to 100% as % of 'don't know' responses not shown.*

C10. I'm now going to read out a few statements about the FSA and what it does and I'd like you to tell me the extent to which you agree or disagree with each statement.

Trusting the FSA to use information appropriately

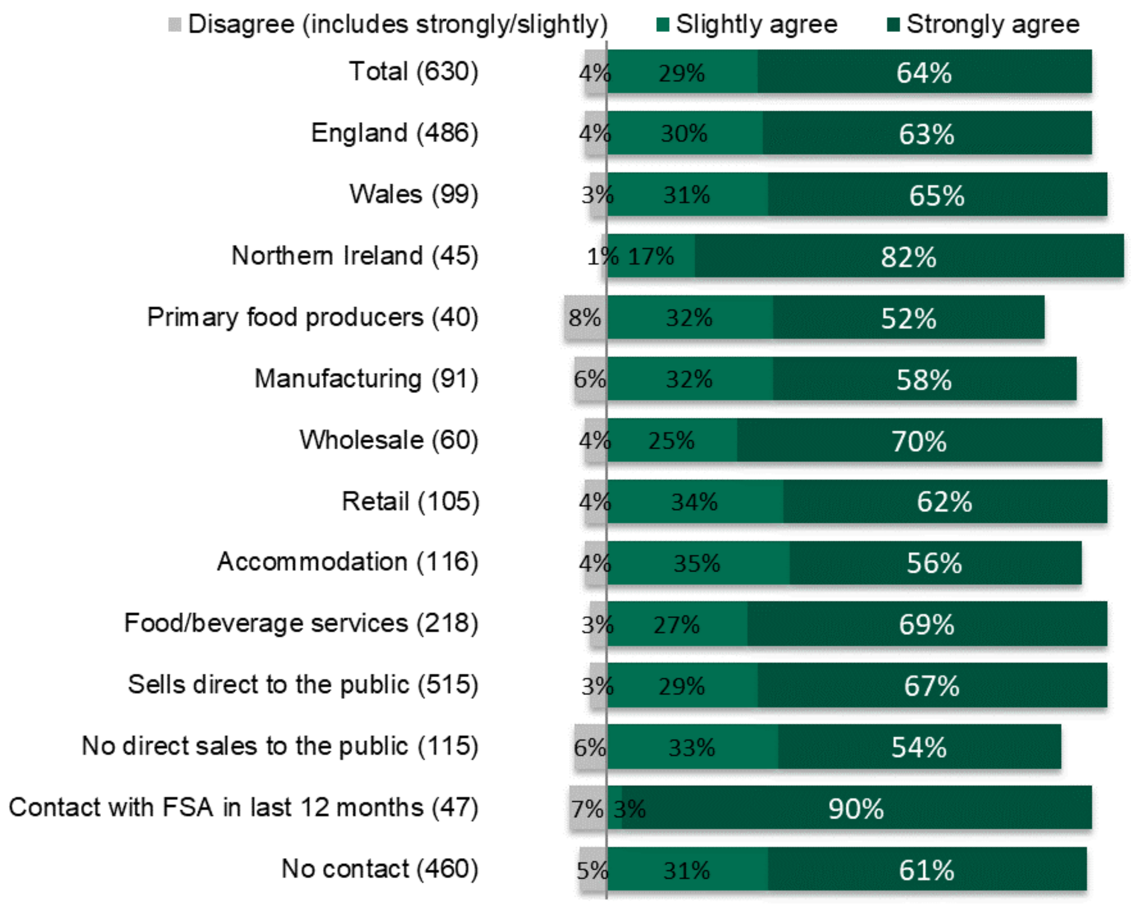
More than nine in ten of respondents (94%) agree that they trust the FSA to use any information they are given appropriately. This includes 64% that strongly agree.

Respondents in Northern Ireland are significantly more likely than those based in England and Wales to strongly agree with this statement (82%, compared with 63% and 65%). While there is no significant difference by organisation size in this respect, respondents in multi-site businesses are significantly more likely to disagree that they can trust the FSA in this way (11%, compared with 4%), although they are also less likely to have a view (10% are not sure).

Respondents within food and beverage services businesses are significantly more likely than average to strongly agree that trust the FSA to use their information appropriately (69%) and this is reflected in the extent to which respondents in businesses that sell direct to the public strongly agree that they do (67%), compared with those that do not (54%). Also, 73% of importers/exporters/distributors strongly agree with this statement.

There is little difference between businesses with different levels of FHRS rating.

Figure 24: Extent to which respondents agree or disagree that they trust the FSA to use any information they are given appropriately (where aware of FSA)



Unweighted sample bases in parentheses. *'Bars' do not add to 100% as % of 'don't know' responses not shown.*

C10. I'm now going to read out a few statements about the FSA and what it does and I'd like you to tell me the extent to which you agree or disagree with each statement.

Overall trust and approval of the FSA

Responses to the statements about the FSA were aggregated and an indicator calculated to provide a single measure of what essentially amounts to trust of the FSA across FBOs in England, Wales and Northern Ireland.

The indicator was first developed in the first wave of this tracking survey and in this second wave there have been changes made to the statements included. Three statements have been reworded slightly and, while having a similar meaning to the statements as they were in 2018 are not directly comparable. One statement has been added as while previously it was felt not to fit into the range of measures, it is felt that the new meaning makes it relevant to the indicator. This additional statement is: The FSA's work is very influential in maintaining standards within the food industry *(previously: The FSA's work is very high profile)*.

The statements used to make up this initial composite measure of trust included:

- The FSA is good at identifying where poor standards exist;
- The FSA understands the needs of small FBOs;
- The FSA is highly effective in terms of promoting regulations within the food industry (previously: The FSA is highly effective at regulating the food industry);
- The FSA would be a good organisation to work with;
- The FSA is working hard to ensure that food safety and standards are maintained and improved within the food industry (previously: The FSA is working hard to improve the food industry for all of us);
- I trust the FSA to uphold and promote high standards (previously: I trust the FSA to do a good job);
- I trust the FSA to use any information I give to them appropriately.

The levels of trust were defined as:

- Overall trust – respondents agreeing with all the statements
- High trust – respondents strongly agreeing with all the statements
- Partial trust – respondents agreeing with at least half the statements
- No trust – respondents disagreeing with all the statements

More than three-fifths of respondents that are aware of the FSA (62%) have overall trust in the FSA; one in four has a high level of trust (24%); Nearly one in three has partial trust (30%) and just 1% have no trust.

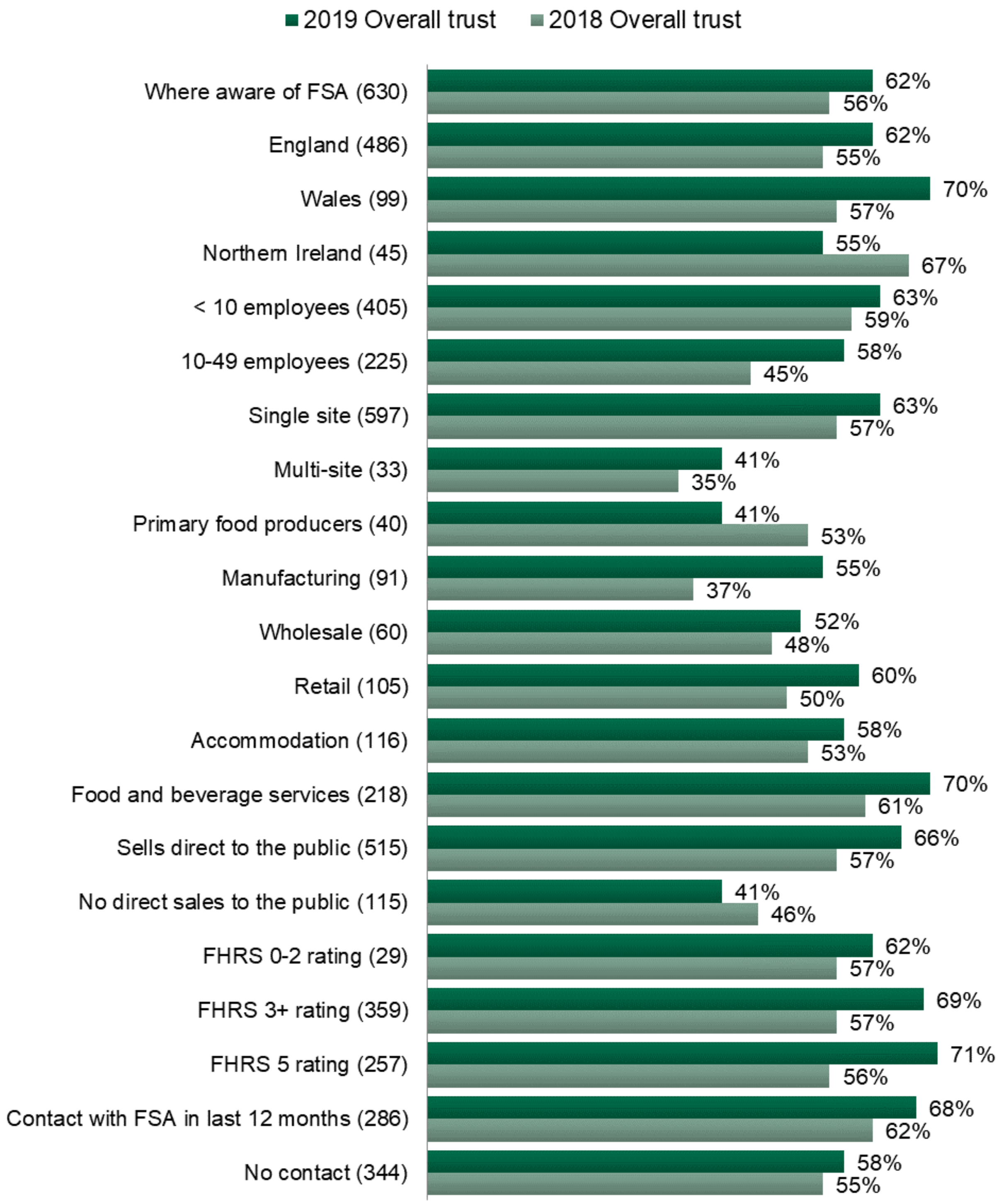
Compared with 2018, there is a higher degree of trust, as, in 2018, 56% had overall trust in the FSA; 20% had a high level of trust.

The high trust indicator is key in terms of highlighting for whom the FSA is performing well and where service improvements can be targeted. Compared with an average of 24% of all respondents that are aware of the FSA that have a high level of trust in it, respondents in food and beverage services businesses are significantly more likely to hold this level of trust in the FSA (29%). The proportion is also significantly higher than average among respondents who work within businesses that sell direct to the public (27%).

Levels of trust are higher among respondents in businesses with higher FHRS ratings. Of those with a 5 rating, 71% have overall trust in the FSA, compared with 62% of those with a rating of 0-2. Respondents that have had contact with the FSA in the last 12 months have higher levels of trust, with 68% having overall trust, compared with 58% that have not had contact with the FSA; and 30% having high trust, compared with 21%.

Respondents within FBOs that sell directly to the public are more than twice as likely than those in FBOs that do not to have high trust in the FSA (27%, compared with 11%).

Figure 25: Trust indicator: Proportions of respondents in the 'overall trust' groups – year on year comparison (where aware of FSA)



Unweighted sample bases in parentheses

C10. I'm now going to read out a few statements about the FSA and what it does and I'd like you to tell me the extent to which you agree or disagree with each statement.

Experiences of processes/interventions

This chapter examines recent experiences of processes, including initial registration as a food business operators (FBO), food hygiene inspections and food safety interventions.

Summary: Experiences of processes/interventions
Just over half the respondents (52%) report that their organisation has had a food hygiene inspection in the last 12 months, very few reported other processes or interventions around food safety issues, although a quarter (25%) have received advice or training about meeting food safety, standards or food hygiene regulations.
There is little criticism of communication FBOs have received with regard to food safety and hygiene processes and interventions. Most report them as having been clear and have found it easy to complete the required process.
Local authorities/district councils are the main source of information about FBO registration.
More than half the respondents (52%) report that their organisation has written procedures in place to guide them through a product recall or withdrawal. This is a lower proportion than in 2018 (60%).
Around one in twenty respondents (6%) report that they have accessed FSA withdrawals and recalls resources in the last 12 months. They are most likely to have accessed the editable allergy alert template for point of sale (51%) and Guidance on Food Traceability, Withdrawals and Recalls within the UK Food Industry (49%).
Around half of respondents (49%) report that their organisation spends minimal time in complying with food standards and regulations. A further quarter (26%) are at the other end of the scale, where they feel there is always a lot to do.

Processes and interventions experienced

More than half the respondents report that their organisation has had a food hygiene inspection in the last 12 months (52%). This will have been carried out by the local authority or district council or, in the case of businesses in Northern Ireland, the DAERA[19]. It is a lower proportion than in 2018 (63%).

Other processes and interventions have been experienced by fewer than one in ten respondents, while one in four respondents have received advice or training about meeting food safety, standards or food hygiene regulations (25%).

Figure 26: Processes and interventions that businesses have experienced or been involved in within the last 12 months – prompted, multiple response (all respondents)

Unweighted sample base = 644

D1. Which, if any, of the following has your business experienced or been involved in within the last 12 months?

While only 7% of all respondents say their organisation has undergone initial registration as an FBO in the last year, these are, of course, more likely to be newly established and

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19 DAERA: Department of Agriculture, Environment and Rural Affairs

the proportion increases to 63% of organisations established in the last 12 months (caution advised here as this is a very low sample base).

Seven per cent of respondents report having a food sample taken by their local authority/district council/DAERA in the last 12 months. This proportion is higher than average in manufacturing (19%) and wholesale (13%) sectors. It is significantly higher among respondents whose organisation serves the public directly than among those whose organisation does not (8%, compared with 2%).

Very few FBOs have experienced a food safety product recall or withdrawal in the last 12 months (2%), and/or have had enforcement action taken against them (1%). However, one in twenty have voluntarily closed down to make improvements following an inspection (5%). This increases to 15% within FBOs with a low FHRS rating (0-2) and 12% of those with an FHRS rating of 3.

As in 2018, respondents in Northern Ireland FBOs are significantly more likely than average to have had a food sample taken (32%), with those in Wales also significantly more likely than average to have had a sample taken (15%). Organisations in Wales are also significantly more likely than average to have had a food hygiene inspection (72%).

More than three in five food and beverage services organisations (63%) have had a food hygiene inspection in the last 12 months, compared with around half of organisations in most other sectors, with the exception of primary food producers, just one in six of whom have had a food hygiene inspection (16%) and wholesale organisations, amongst whom just 38% have had an inspection.

One in four respondents report their organisation has received advice or training about meeting food safety, standards or food hygiene regulations (25%) and this increases to 39% of larger FBOs (25-49 employees) and 45% of multi-site organisations. Newly established FBOs are more likely than average to have received advice or training in this area (38% of those established for less than a year), while FBOs at both ends of the FHRS rating scale are slightly more likely than average to have received this advice or training (31% where FHRS rating of 0-2 and 30% where a rating of 5).

More than a third of respondents (37%) reported that their organisations have not experienced any of these processes or interventions or received advice or training in food safety, standards or food hygiene in the last 12 months. See

A22: Processes, interventions, advice/training organisations have experienced or been involved in within the last 12 months, by nation, sector, and FHRS rating (where aware of the FSA)

	Total	England	Wales	Northern Ireland	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services	FHRS rating 0-2	FHRS rating 3+
Registration or re-registration as a food business or registration of new premises	7%	7%	9%	3%	0%	11%	6%	7%	**13%**	8%	4%	8%
A food hygiene inspection by your Local Authority/ District Council/ DAERA	52%	51%	**72%**	53%	16%	53%	38%	51%	57%	**63%**	62%	59%
Food safety product recall or withdrawal	2%	2%	8%	0%	0%	2%	0%	8%	0%	2%	3%	3%
Having a food sample taken by your Local Authority/District Council/DAERA	7%	5%	**15%**	**32%**	7%	**19%**	**13%**	7%	8%	5%	6%	6%
Having enforcement action taken against your business	1%	1%	0%	1%	2%	1%	2%	1%	0%	0%	0%	*%
Received advice or training about meeting food safety, standards or food hygiene regulations	25%	25%	26%	22%	12%	**35%**	28%	23%	31%	**28%**	31%	27%

Voluntarily closing down premises to make improvements following an inspection	5%	5%	6%	2%	*%	1%	0%	5%	3%	6%	15%	5%
None of the above	37%	38%	21%	37%	**76%**	34%	**54%**	40%	31%	25%	18%	30%
Unweighted bases	644	498	100	46	41	91	62	110	116	224	30	368

[20](annex 1) for more detail.

Clarity of communications

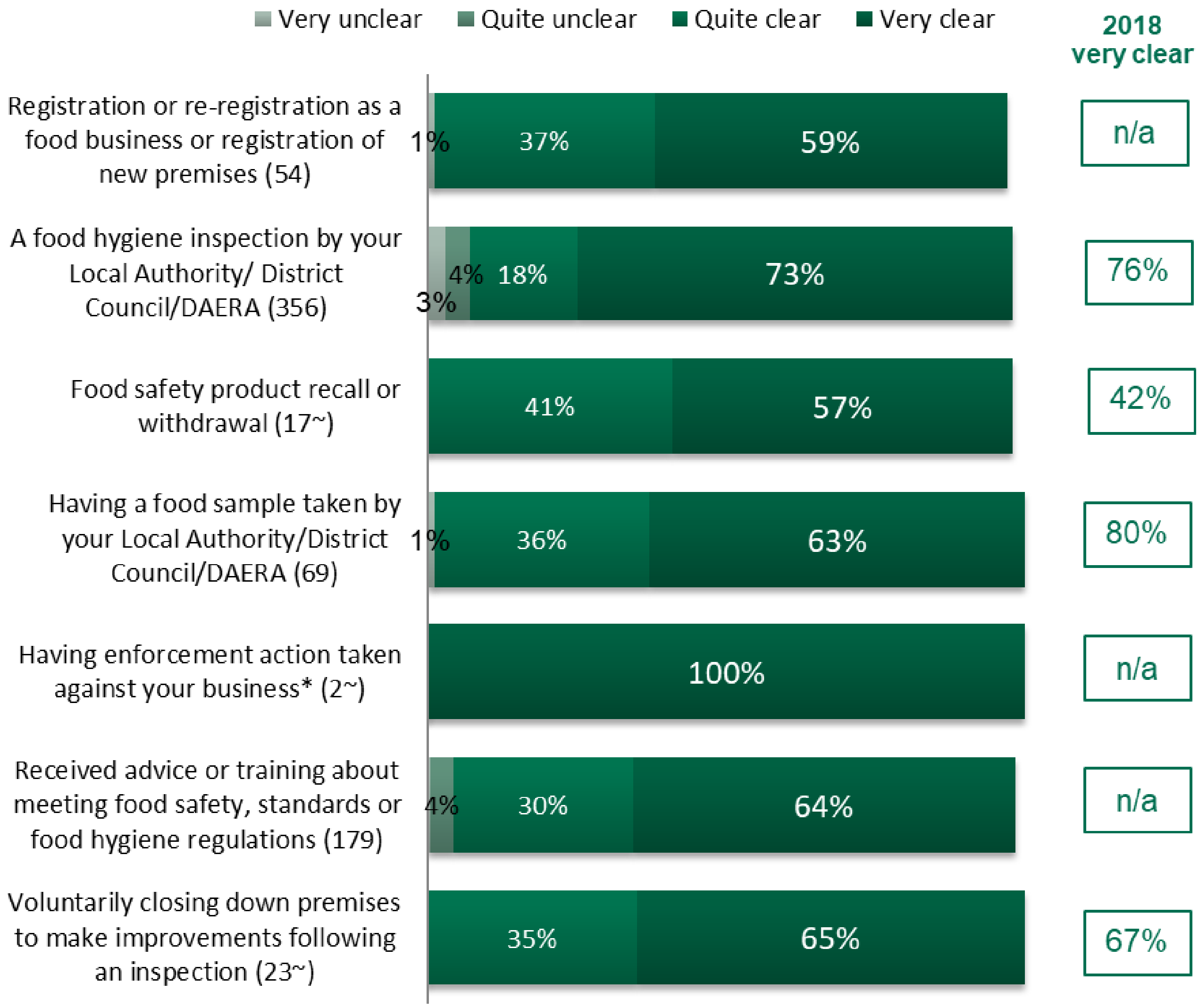
When asked how clear the communications received relating to the processes and interventions had been, the majority of respondents reporting experience of each felt they had been clear, mainly *very* clear.

Respondents were most likely to feel that communication with regard to food hygiene inspections had been very clear (73% of those that had experienced them), while around two-thirds felt that communications regarding closing down premises for improvements following an inspection and about advice or training had been very clear. (65% and 64% respectively of those that have experienced each). There was relatively less perceived clarity with regard to communications received regarding registration (59% considering it very clear) and food safety product recall or withdrawal (57%). All of those providing a response with regard to communications to do with having enforcement action taken against them considered them very clear. However, around half of these respondents were not sure.

Only a very small minority of respondents with recent experience in these areas have found the communications unclear (at most 6% with regard to food hygiene inspections).

[20] [CTRL + CLICK] on blue text to go to detailed information if viewing digitally.

Figure 27: Extent to which respondents considered communications received relating to food safety and hygiene processes and interventions clear (where experienced/involved with)



Unweighted sample bases in parentheses ~ caution: low sample base Don't knows not shown
'Bars' do not add to 100% as % of 'don't know' responses not shown *n/a = not asked in 2018*
*Where provided a response

D2. How clear were any communications you received relating to ..?

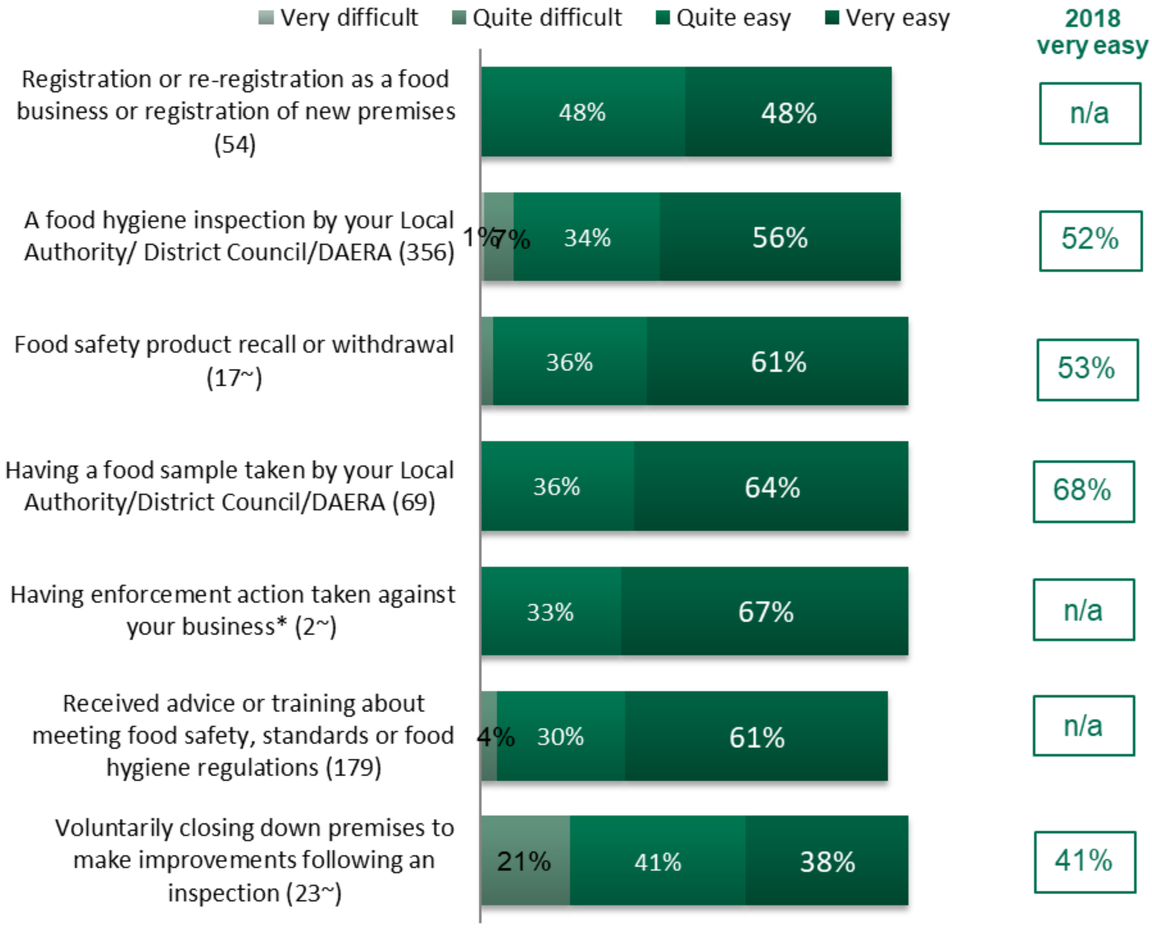
Ease of completion of processes and interventions

Respondents with recent experience of these processes and interventions were then asked how easy or difficult they had found it to complete the required process.

In all but voluntarily closing down premises to make improvements following an inspection, the vast majority of respondents had found it easy to complete the process.

One in five that experienced having to close down their premises to make improvements found the required process difficult (21%).

Figure 28: Extent to which respondents found it easy or difficult to complete the required process (where experienced/involved with)



Unweighted sample bases in parentheses ~ caution: low sample base Don't knows not shown
'Bars' do not add to 100% as % of 'don't know' responses not shown. n/a = not asked in 2018

*where provided a response

D3. And how easy or difficult did you find it to complete the required process of ...?

Food hygiene inspections

Of the 52% of respondents within FBOs that have experienced a food hygiene inspection by their local authority/district council or DAERA (in the case of 53% of Northern Ireland respondents) in the last 12 months, around three-quarters (73%) found the communications they received relating to the process very clear and a further 18% found them quite clear.

Respondents within FBOs that have been established for 5 or more years are more likely than those that been established more recently to have found the communications quite or very clear (95%, compared with 85%), while fewer respondents in FBOs with a low FHRS rating (0-2) than among those with the highest FHRS rating (5) rated communications as very clear (61%, compared with 78%).

In terms of how easy or difficult is was to complete the required process, more than half of respondents that experienced a food hygiene inspection (56%) found it very easy, while a further third (34%) found it quite easy. Respondents in Northern Ireland are more likely than those based elsewhere to report it as being very easy (65%), while the proportion of respondents within the highest FHRS rated businesses (5) that found it very easy is higher than the proportion of those in low FHRS businesses (0-2) (60%, compared with 40%).

Food samples

Of the 7% of respondents within FBOs that have had a food sample taken by their local authority/district council or DAERA (in the case of 33% of Northern Ireland respondents) in the last 12 months, around two-thirds (63%) found the communications they received relating to the process very clear and a further 36% found them quite clear.

Respondents within FBOs that sell products pre-packed elsewhere are less likely than those that sell products unpackaged or packed at the premises to have found the communications very clear (59%, compared with 72% and 69% respectively).

All respondents reporting that their organisation had had a food sample taken reported that the required process had been easy, including 64% that reported it as having been very easy. Fewer respondents in England reported it to have been very easy (52%) than in Wales (70%) and Northern Ireland (94%).

Respondents within FBOs that sell unpackaged products are more likely than those in organisations selling packaged products to have found the process very easy (71%, compared with 54% selling products packaged elsewhere and 45% selling products packaged at the premises). There is a clear link here between the propensity to consider communications clear and to find the process of having a food sample taken easy.

Receiving advice or training about meeting food safety standards or food hygiene regulations

Of the 25% of respondents within FBOs that have received advice or training about meeting food safety standards or food hygiene regulations in the last 12 months, around two-thirds (64%) found the communications they received relating to the advice or training very clear and a further 30% found them quite clear.

Respondents within small FBOs are significantly more likely than those in micro FBOs to have found communications about advice or training very clear (79% of those with 10-49 employees, compared with 60% of those with less than 10 employees).

All but 4% of respondents reporting that their organisation had received advice or training in the last 12 months reported that the required process had been easy, including 61% that reported it as having been very easy. Most Northern Ireland respondents have found it very easy (92%).

Respondents within recently established FBOs are more likely than those in longer established organisations to have found the process very easy (74% of those established in the last 5 years, compared with 55% of those established 5 or more years ago).

Food product recall or withdrawal

The 2% of respondents that have experienced a food product recall or withdrawal in the last 12 months were asked about the experience.

One in four of those that had experienced a food product recall or withdrawal (28%) returned the product to the supplier, while another one in four disposed of the product (25%). For one in six (18%) a product recall was involved, while around one in ten (9%) took the product off the shelf/withdrew the product from sale. One in three (33%) could not recall what happened.

Specific experiences are reported as follows:

> “A supplier sent meat that may have been contaminated to this site and numerous other customers. This led to fatalities amongst other customers in England. The supplier waited two months from the first case to recall the products, the communication from EHO was significantly better and they took swabs and samples the next working day from when the product recall was announced.”
>
> “We had Walkers’ crisps and the wheat wasn't highlighted in the ingredients so we had to destroy them.”

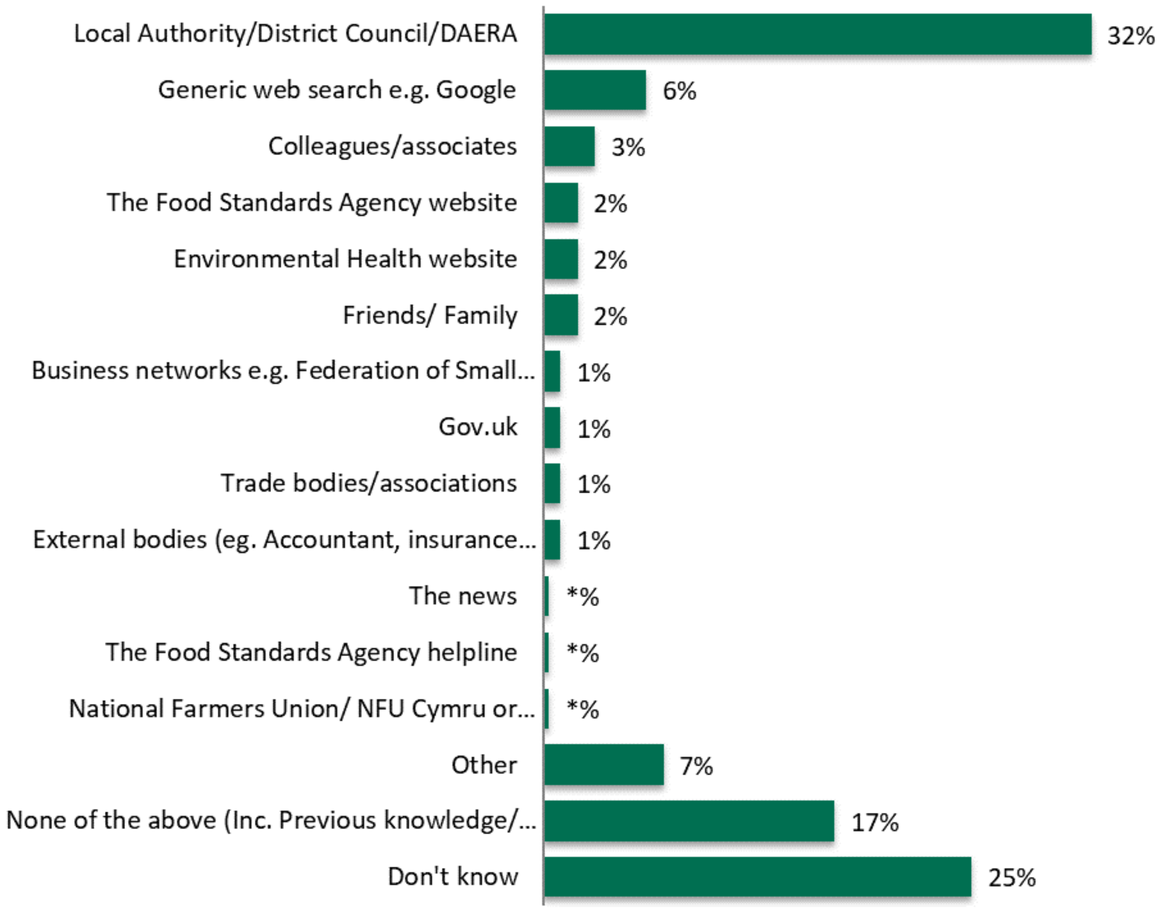
"Contacted our own customers via email and phone, collected the goods from customer depots, if the goods were already on the shelves, they had to be taken off."

"Have had four different recalls and withdrawals and were notified by the Food Standards Agency - they were to withdraw the products and alert customers about it."

Sources of information re: registration

When asked about where they had found out that they needed to register their FBO with the local authority, a third of respondents (32%) mentioned their local authority/district council or DAERA in the case of those in Northern Ireland. Very few respondents mention other sources in this respect.

Figure 29: Initial sources of information about registering FBOs – unprompted, multiple response (all respondents)



Unweighted sample bases = 644 * denotes less than 0.5%

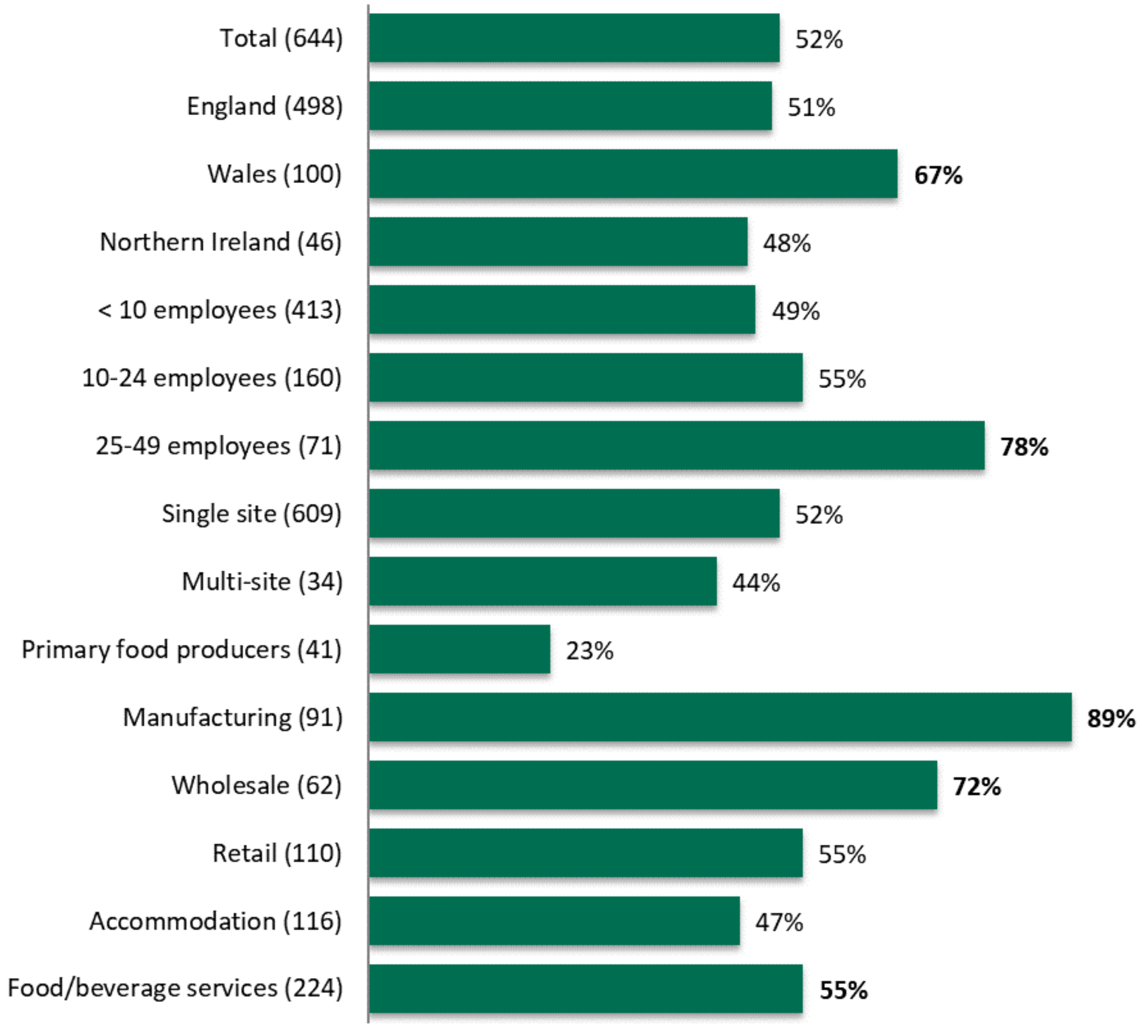
D4c. Where did you find out you needed to register your food business with the local authority

Written procedures on product recalls and withdrawals

Around half of all respondents (52%) reported that their organisation has written procedures in place to guide them on how to deal with product recall or withdrawal. This compares with 60% in 2018.

The propensity to have these procedures written down is greater than average within larger FBOs (78% of those with between 25 and 49 employees) and this is reflected across sectors, as manufacturing and wholesale FBOs, who are both more likely than average to be small rather than micro FBOs, are particularly likely to have written procedures on product recalls and withdrawals in place (89% and 72% respectively). Accommodation businesses, who are also more likely than average to be small rather than micro FBOs, are slightly less likely than average to have written procedures on this (47%). These businesses deal in services rather than products on the whole.

Figure 30: Proportion of FBOs that have written procedures in place to guide them on how to deal with a product recall or withdrawal (all respondents)



Unweighted sample bases in parentheses

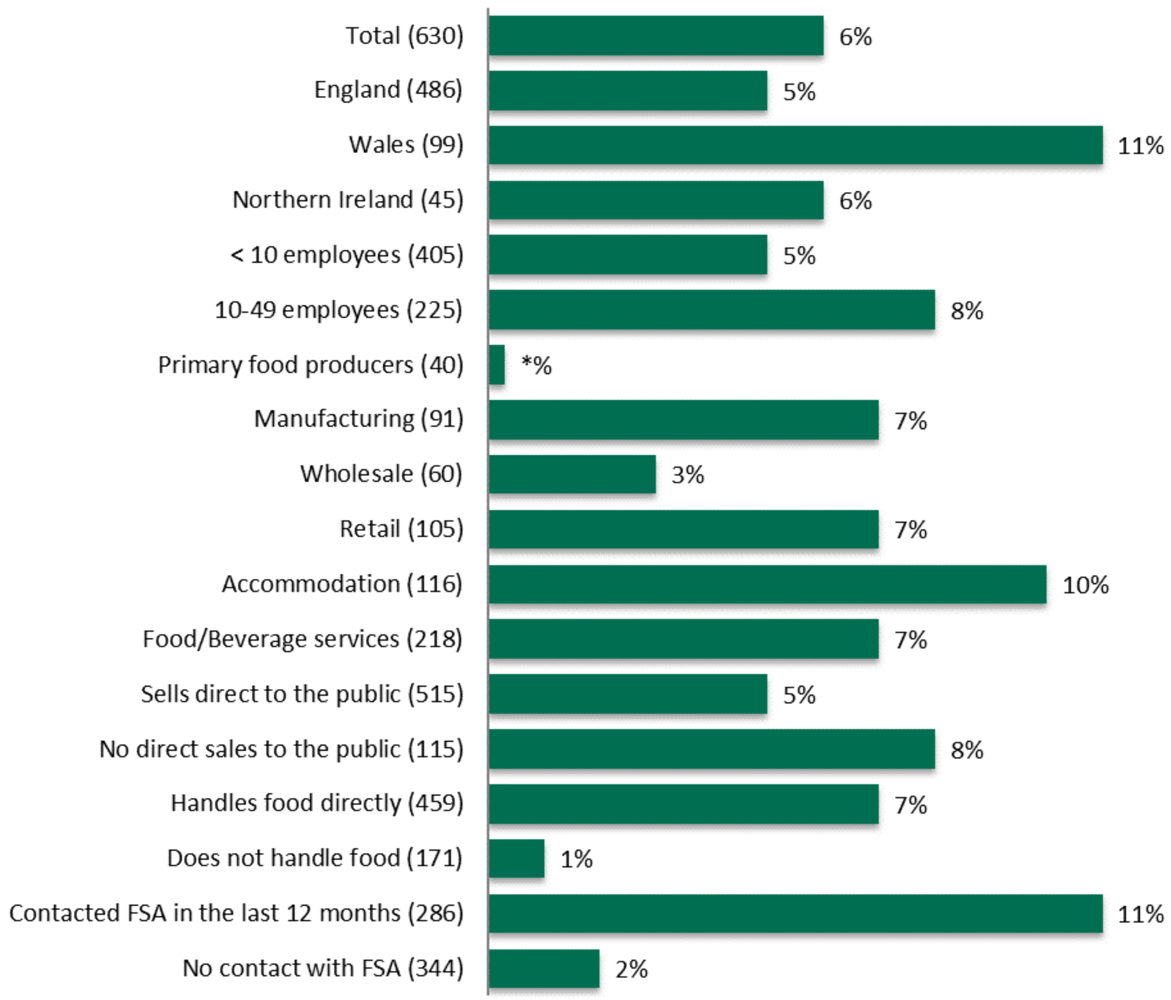
D5. Do you have existing written procedures in place to guide you on how to deal with a product recall or withdrawal?

Figures in bold are statistically significantly higher than the total minus the sub-group tested to a 95% significance level

FSA withdrawals and recalls resources

Six per cent of respondents who were aware of the FSA before being surveyed had accessed FSA withdrawals and recalls resources in the last 12 months. This increases to 11% of respondents in Wales and 11% of those in larger small businesses (25-49 employees). The proportion is also higher than average among those who have contacted the FSA in the last 12 months (11%), although 2% of those that say they have not done so also accessed these resources.

Figure 31: Proportion of FBOs that have accessed FSA withdrawals and recalls resources in the last 12 months (all respondents)

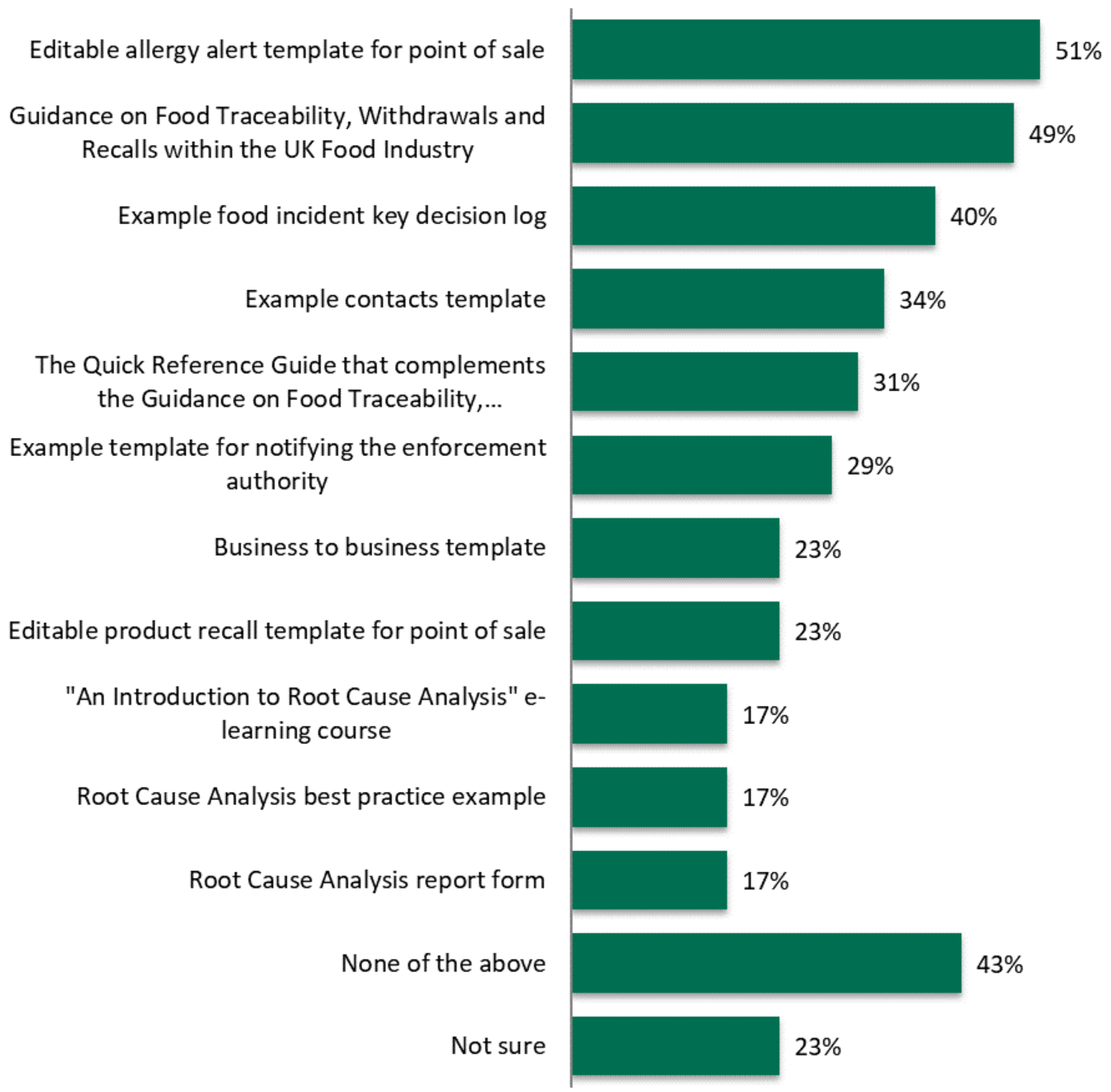


Unweighted sample bases in parentheses * denotes less than 0.5%

D6A. Have you accessed FSA withdrawals and recalls resources in the last 12 months?

In terms of the resources accessed, the most frequently mentioned were the editable allergy alert template for point of sale (51% of those that had accessed any) and Guidance on Food Traceability, Withdrawals and Recalls within the Food Industry (49%). The extent to which resources were accessed by those that had accessed them is summarised in the figure below. These numbers equate to just 1-3% of all respondents. It is apparent that many of the respondents that report having accessed resources are unsure which ones they have accessed, or do not recognise the specific resources from the list they were given to choose from.

Figure 32: FSA withdrawals and recalls resources accessed in the last 12 months – prompted, multiple response (where accessed any)



Unweighted sample base = 35

D6. Have you accessed any of the following FSA withdrawals and recalls resources in the last 12 months?

Time taken within the organisation to comply with food standards and regulations

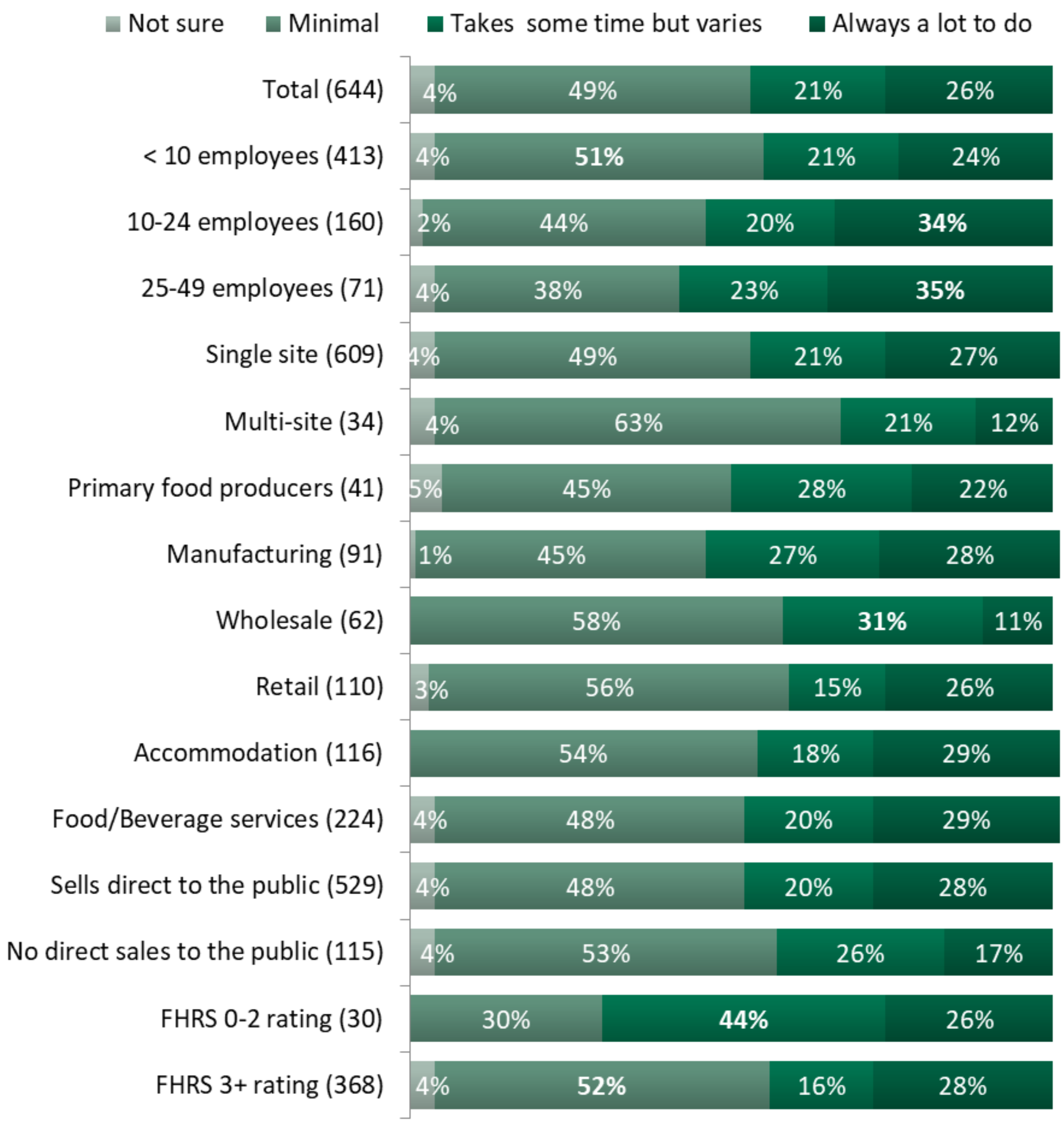
Respondents were asked how they would describe the effort that their organisation has to put into complying with food standards and regulations. Around half (49%) described it as **minimal – part of everyday activities**; while a further quarter (26%) said there was **always a lot to do**. Most of the remainder (21%) reported that it **takes up some time but that the amount of time varies across the year**.

Micro FBOs are more likely than small FBOs to describe the effort as **minimal** (51% where less than 10 employees, compared with 43% where 10-49 employees). Small FBOs (10-49 employees) are significantly more likely than micro FBOs to say there is **always a lot to do** (34%, compared with 24%), Lower levels of activity in respect of compliance with standards and regulations may reflect the lack of staff available in micro FBOs to dedicate time to this area and it may suggest having to fit in the work to the time available within these organisations. However, a greater level of activity within small FBOs may reflect the need to do more where there are more staff, perhaps a wider range of products and services and, possibly functions, and where premises are larger or there are multiple premises to administer.

There is no significant difference by organisation size with regard to the intermediate option that it **takes up some time but the amount of time varies across the year**.

There is little variation by sector, although wholesalers are significantly more likely than those in other sectors to describe the efforts as variable across the year (31%). FBOs with a low FHRS rating (0-2) are also significantly more likely than those with a rating of 3 or more to describe their efforts to comply with food standards and regulations this way (44%, compared with 16%), while those with a higher rating (3+) are significantly more likely to describe their efforts as minimal – part of everyday activities (52%, compared with 30%). This suggests that FBOs meeting a good standard in food hygiene and safety tend to have an approach to compliance which is more integral to everyday activity than those that are performing poorly.

Figure 33: How respondents would describe the effort within the organisation to comply with food standards and regulations – prompted, multiple response (all respondents)



Unweighted sample bases in parentheses

D7. In general, how would you describe the effort that your business has to put into complying with food standards and regulations?

Figures in bold are statistically significantly higher than the total minus the sub-group tested to a 95% significance level

Information and communication

This chapter summarises food business operators' (FBOs) preferences with regard to information and communication on food safety and hygiene.

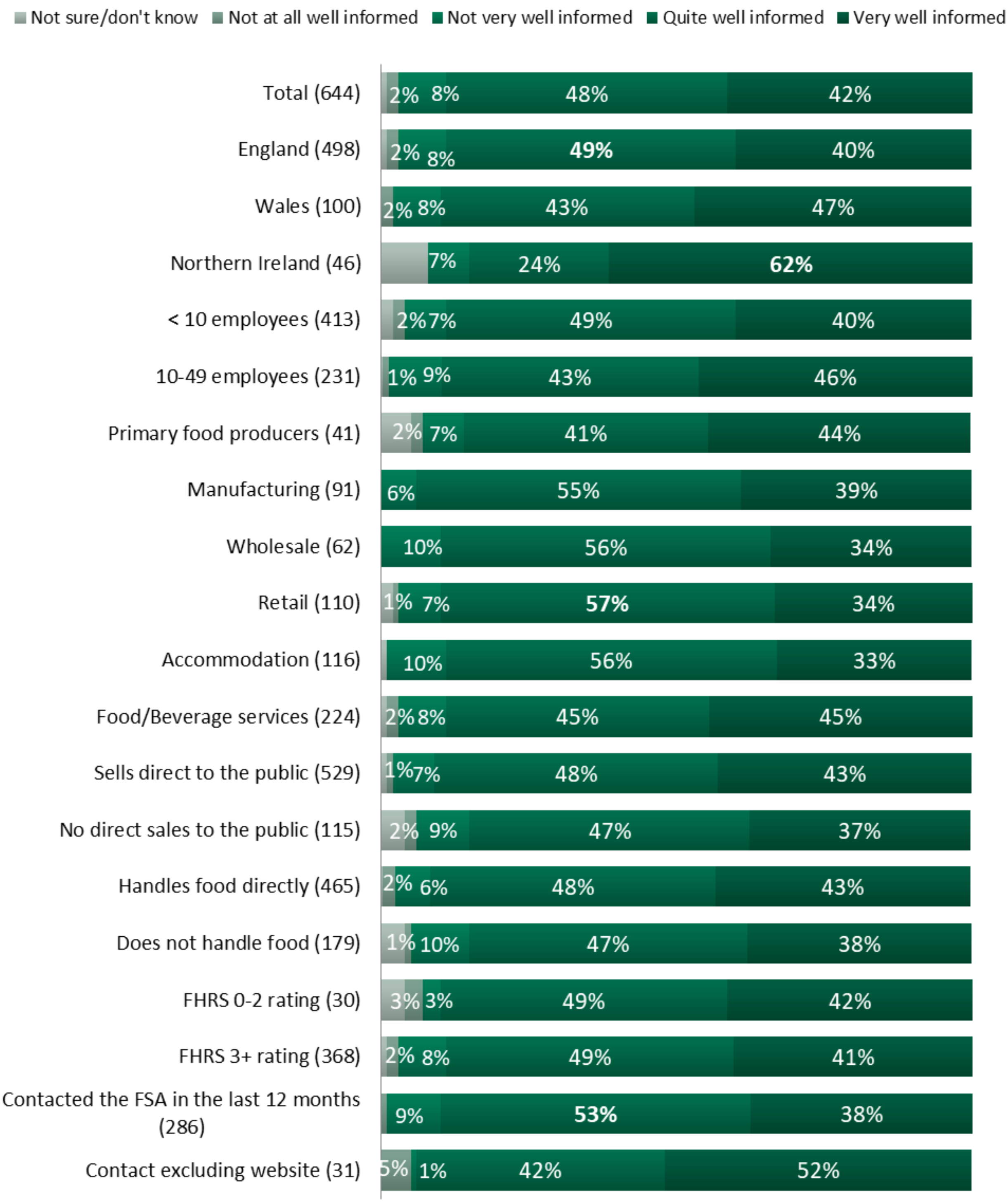
Summary: Information and communication
Nine in ten respondents (90%) feel at least quite well informed about regulations that affect their organisation overall. This includes just over two in five that feel very well informed (42%).
Google and local authority/district council/DAERA websites are the most frequently mentioned sources of information about food safety guidelines and regulations, food allergies and product recalls. The FSA website is mentioned by more than two in five respondents (44%), a similar proportion mention the environmental health website (43%).
Local authority/district council/DAERA website and the FSA website are considered the most useful sources of information by similar proportions of respondents (19% and 18% respectively).
One in eight respondents that are aware of the FSA (13%) have subscribed to the FSA news and alerts service to receive food and allergy alerts by email or text message. A further 16% have heard of the service but not subscribed to it. There has been little change in this since 2018.
Following on from 2018, awareness of the National Food Crime Unit remains at a low level (17%; 18% in 2018).

Sources of information

Respondents were asked to indicate how well informed they feel about regulations that affect their organisation overall. Nine in ten (90%) feel at least quite well informed, including 42% that feel very well informed. Most of the remainder feel that they are not very well informed (8%), with 1% feeling not at all well informed and a 1% not sure.

Respondents in Northern Ireland are most likely to consider themselves very well informed (62%), while there is little difference by organisation size or sector overall. Furthermore, businesses that sell direct to the public and respondents that handle food directly themselves are no more likely than average to feel well informed about regulations. There is no significant differences by FHRS ratings either, but contact with the FSA is a factor, and those that have had contact with the FSA in the last 12 months that has been more than just a visit to the website are more likely than average to feel very well informed (52%).

Figure 34: Extent to which respondents feel informed about regulations that affect their organisation – (all respondents)



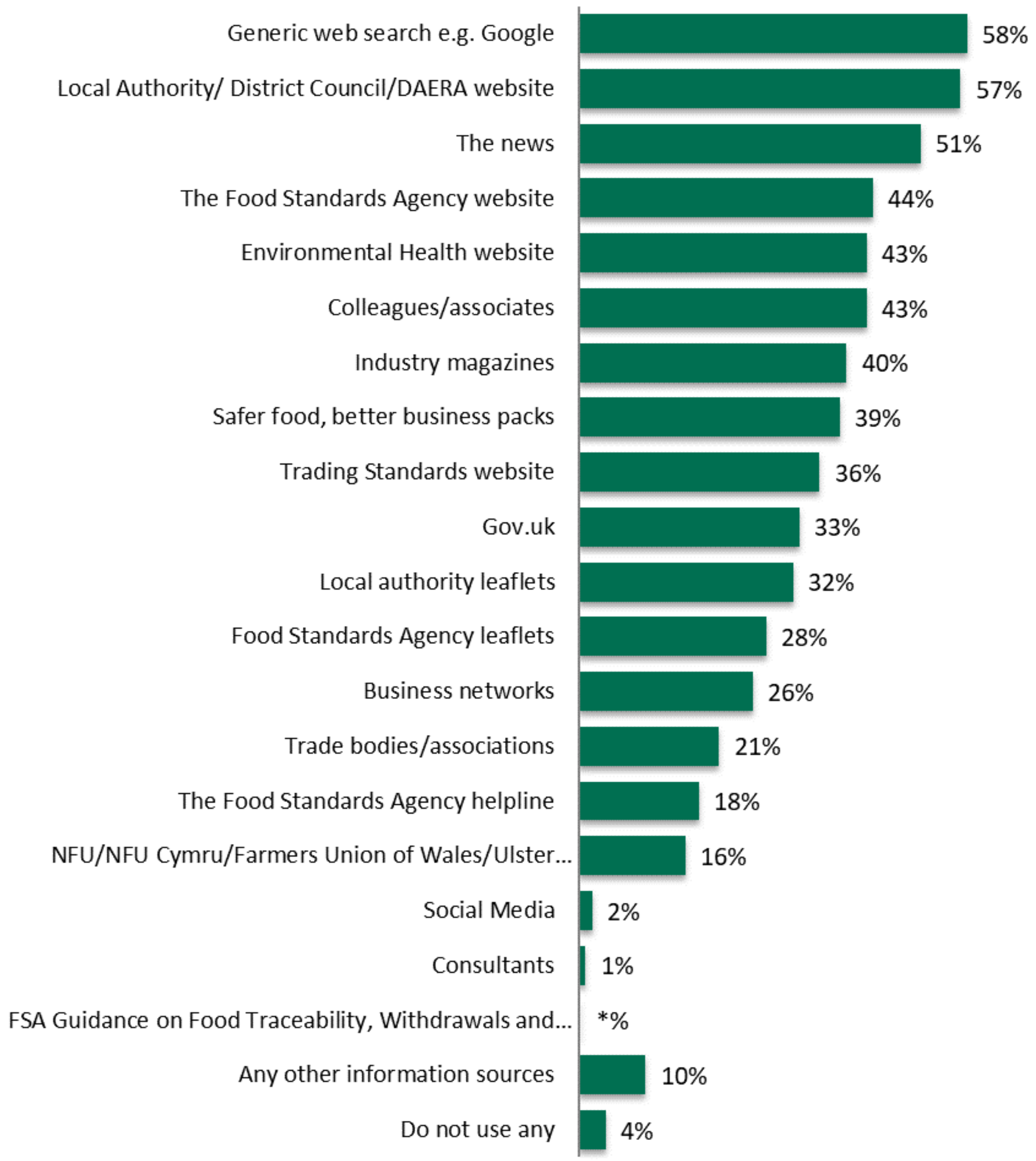
Unweighted sample bases in parentheses. *don't know' responses are not shown*

E1A. Overall, how well informed do you feel about regulations that affect your business?

Figures in bold are statistically significantly higher than the total minus the sub-group tested to a 95% significance level

Respondents were asked about the sources they use to find out about food safety guidelines and regulations, food allergies and product recalls. Their responses are summarised in the figure below.

Figure 35: Sources of information about food safety guidelines and regulations, food allergies and product recalls – prompted, multiple response (all respondents)



Unweighted sample base = 644 * denotes less than 0.5%

E1. Which of the following do you use to find out about food safety guidelines and regulations, food allergies and product recalls? Do you use...?

The top three sources of information about food safety guidelines and regulations, food allergies and product recalls selected by respondents included Google or similar (i.e. a web search) (58%), their local authority/district council/DAERA[21] website (57%) and the news (51%). The Food Standards Agency website is selected by just over two in five respondents (44%), while more than one in four respondents cited Food Standards Agency leaflets (28%) and one in six respondents mentioned the Food Standards Agency helpline (18%).

A similar list of possible sources was read out to respondents this year compared with last year, but the proportions selecting each were higher in 2018 (Google - 73%; the Food Standards Agency website - 68% and their local authority/district council/DAERA - 64%).

There is some variation in sources used by nation, with the local authority and FSA websites significantly more likely to be used by respondents within FBOs in Wales than average (73% and 58% respectively), with two in five respondents in Wales (41%) mention Food Standards Agency leaflets. Respondents in Wales cite a wider range of sources than respondents elsewhere.

Respondents in food and beverage services organisations tend to use a wider range of sources than other sectors and are significantly more likely than average to use many, particularly their local authority/district council/DAERA website (61%); and the Food Standards Agency website (53%); although respondents in manufacturing FBOs are more likely still to select the FSA website as a source (62%). See

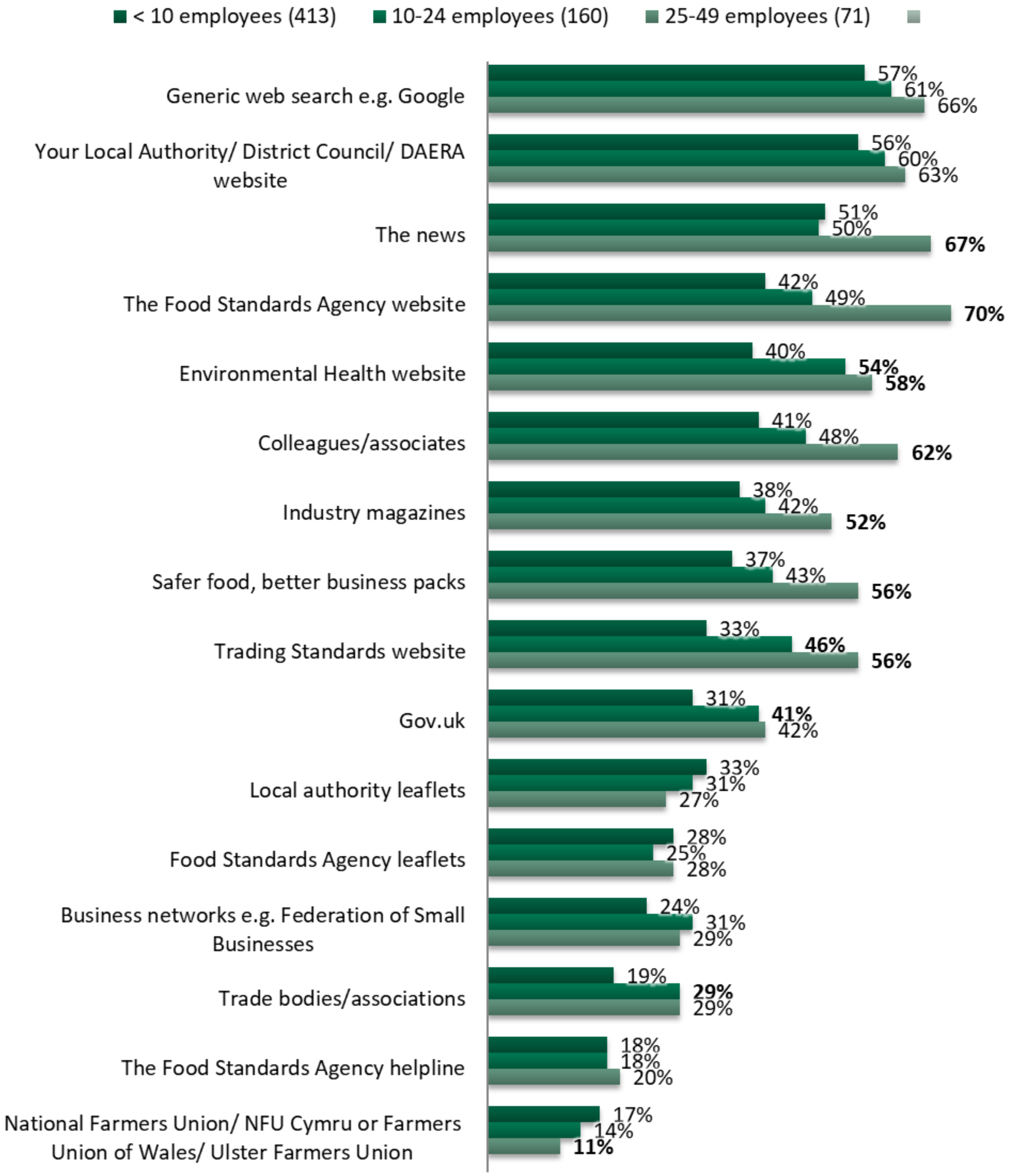
[21] DAERA – Department of Agriculture, Environment and Rural Affairs

A23 [22] (annex 1) for more detail.

Respondents within small FBOs also tend to select a wider range of sources than those in micro businesses, particularly the Food Standards Agency website (53% where there are 10-49 employees, compared with 42% where there are fewer than 10 employees) and the environmental health website (55%, compared with 40%). Respondents in larger FBOs – those with 25-49 employees – are particularly likely to cite the Food Standards Agency website as a source (70%) as well as the news (67%).

[22] [CTRL + CLICK] on blue text to go to detailed information if viewing digitally.

Figure 36: Sources of information about food safety guidelines and regulations, food allergies and product recalls – prompted, multiple response, by organisation size (all respondents)



Unweighted sample bases in parentheses

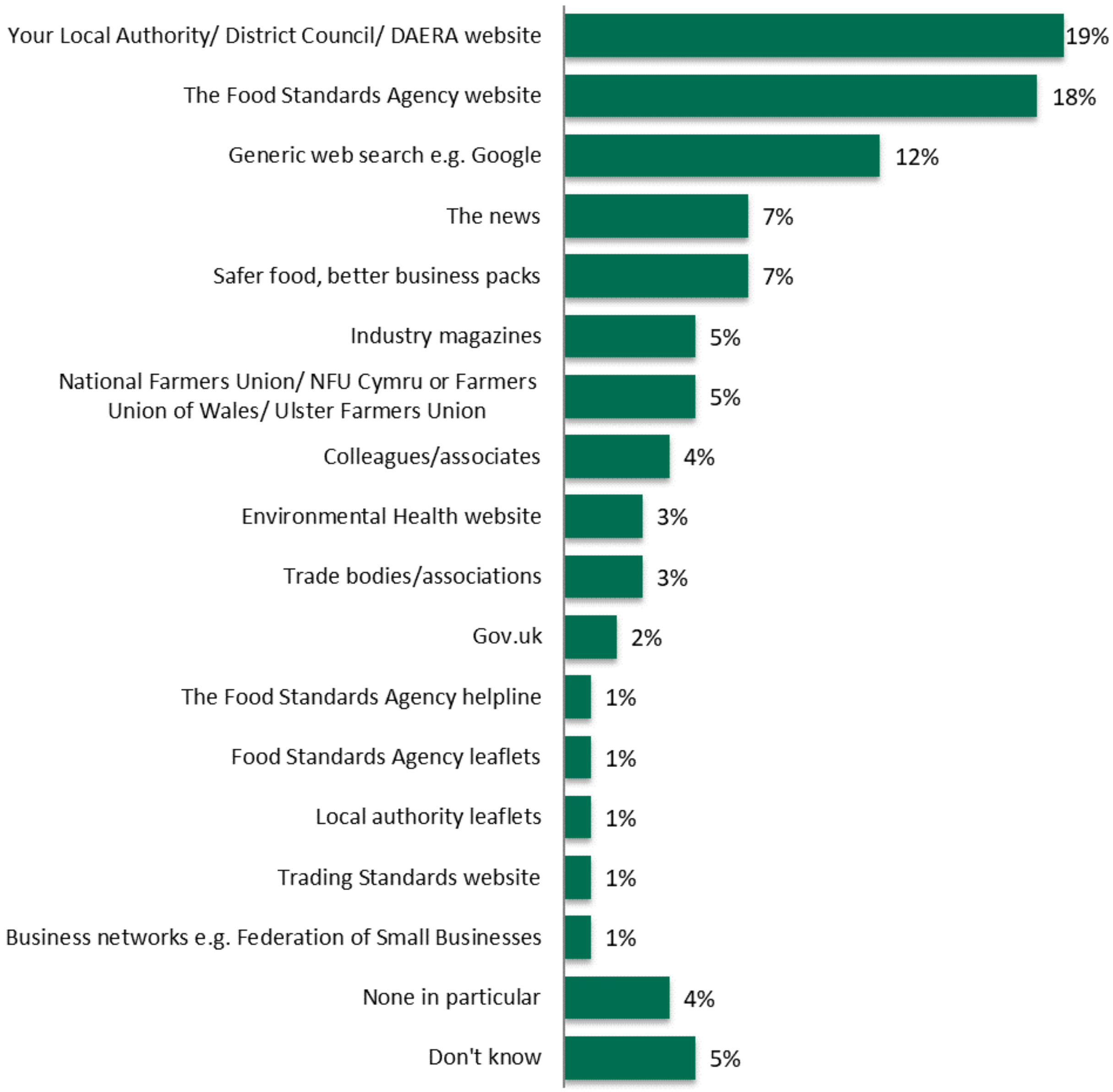
E1. Which of the following do you use to find out about food safety guidelines and regulations, food allergies and product recalls? Do you use...?

Figures in bold are statistically significantly higher than the comparison sub-groups to a 95% significance level

When asked which source they had found to be most useful, around one in five elected for their local authority/district council/DAERA website (19%), increasing to 40% of respondents in Northern Ireland, where they are referring to the DAERA website in particular.

A similar proportion (18%) consider the Food Standards Agency website most useful (18%), increasing to 23% of food and beverage services, 24% of manufacturing businesses and 29% of retail - specialists.

Figure 37: Most useful source of information about food safety guidelines and regulations, food allergies and product recalls – prompted, multiple response (all respondents)



Unweighted sample base = 644

E1B. Which of these have you found to be the most useful in finding out about food safety guidelines and regulations, food allergies and product recalls?

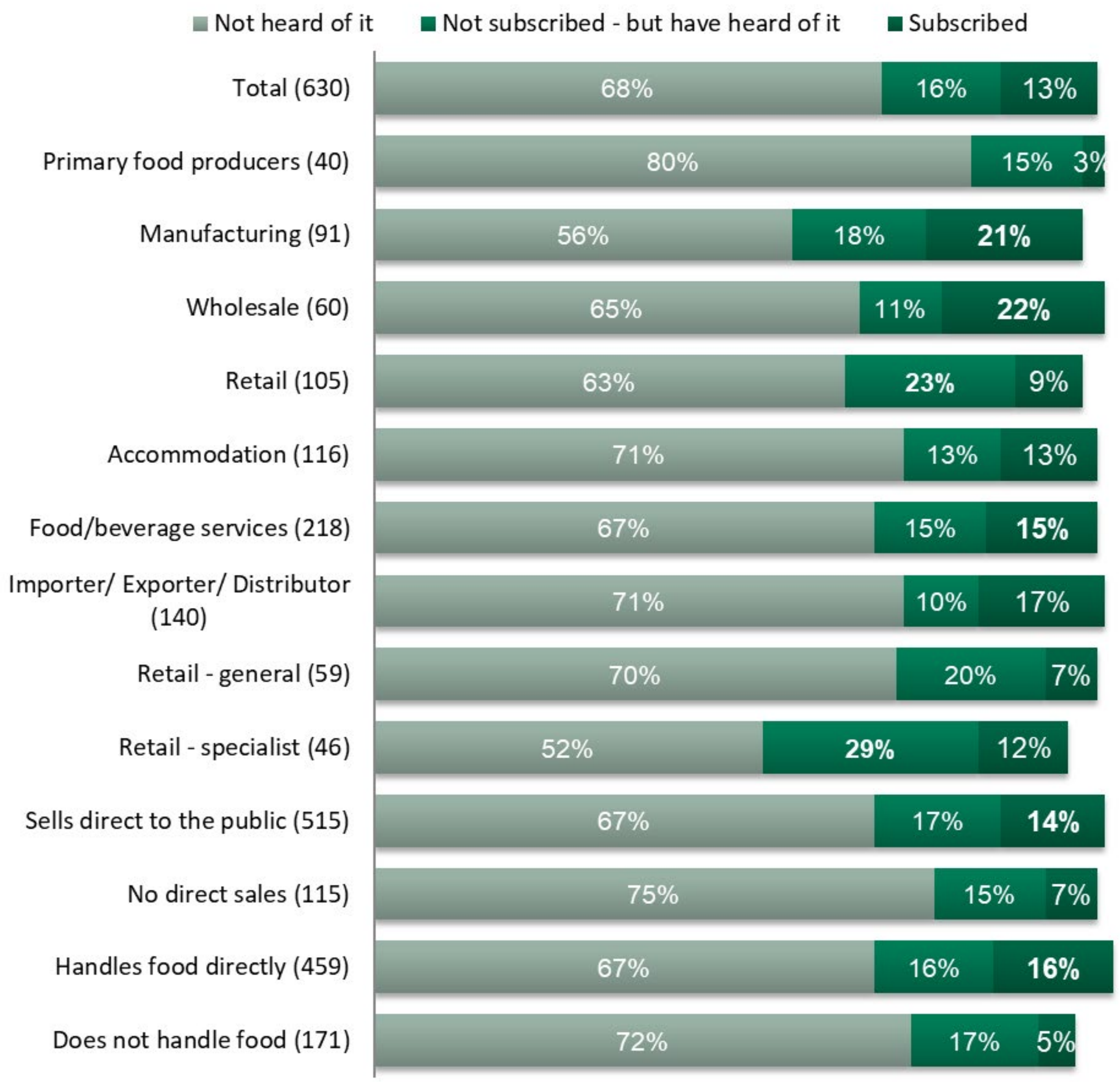
FSA news and alerts service

Respondents aware of the FSA were asked if they have subscribed to the FSA news and alerts service to receive food and allergy alerts by email or text message.

One in eight (13%) have subscribed; another one in six (16%) have heard of the service but not subscribed to it, and the majority (68%) have not heard of it. Three per cent were not sure. There has been little change in this respect since 2018. The same proportion as then have subscribed, although the proportion that have heard of it but not subscribed as increased slightly in the last 12 months (13% in 2018).

Subscribers are more strongly represented in the wholesale (22%) and manufacturing (21%) sectors, while very few primary food producers have subscribed (3%). The proportion of respondents that have subscribed to the service is higher than average among importers/exporters/distributors (17%), food and beverage services organisations (15%) and among respondents whose organisations sell directly to the public (14%) and among respondents that handle food directly (16%).

Figure 38: Proportion of FBOs that have subscribed to the FSA news and alerts service (to receive food and allergy alerts by email or text message), by sector, direct sales to the public and food handling (where aware of FSA)



Unweighted sample bases in parentheses Don't knows not shown

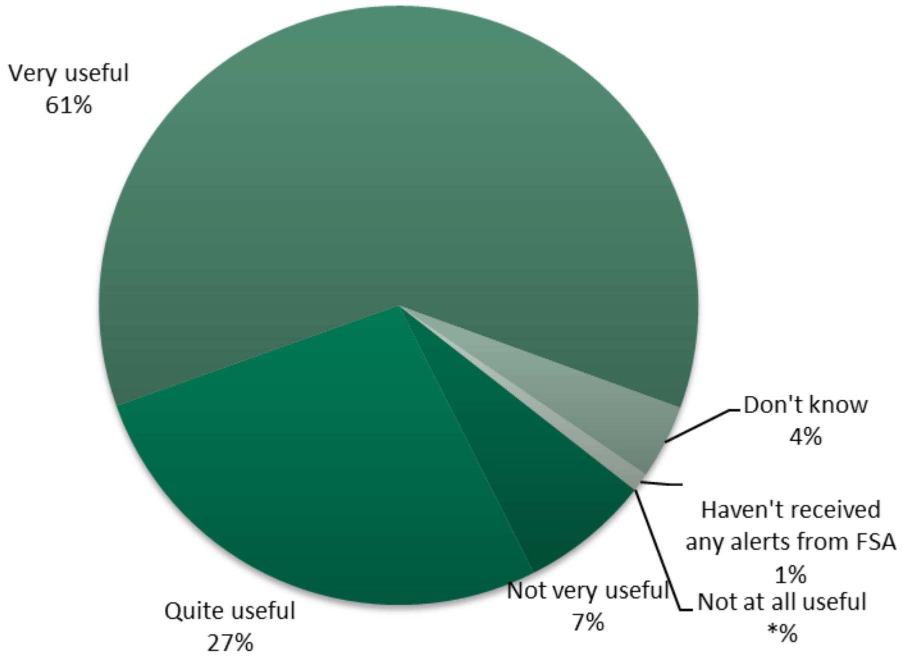
E4. Have you subscribed to the FSA news and alerts service (to receive food and allergy alerts by email or text message)?

Figures in bold are statistically significantly higher than the total minus the sub-group tested to a 95% significance level

Respondents that have subscribed to the FSA alerts service rate it highly in terms of its usefulness. Overall 88% rate it as at least quite useful, with the majority (61%) rating it as very useful. The proportion rating it as very useful increases to 71% of food and beverage services businesses.

Ratings of the FSA alerts service are very similar to those reported in 2018.

Figure 39: Usefulness of FSA alert service (where subscribed to FSA alerts service)



Unweighted sample base = 98

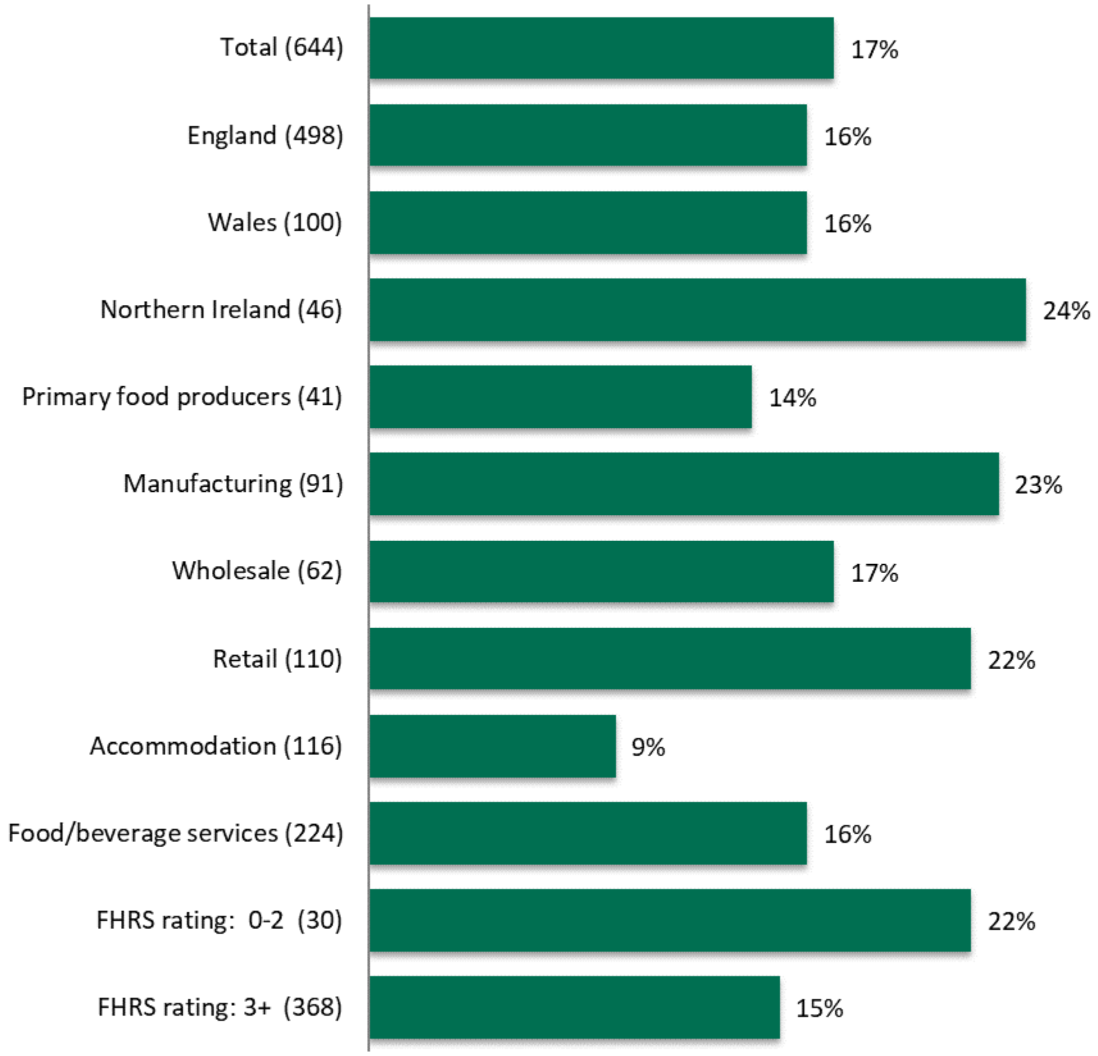
E5. How useful have you found the FSA alerts service?

National Food Crime Unit

All respondents were asked if they are aware of the National Food Crime Unit. One in six (17%) are, which is similar to the 2018 figure (18%). This proportion is higher amongst respondents in Northern Ireland (24%) and amongst manufacturers (23%) and retailers (22%). Around one in four of respondents in FBOs where food is packed at the premises are aware of the FSA National Food Crime Unit (26%).

Respondents within FBOs with a low FHRS rating of 0-2 are more likely than those within FBOs with a higher rating to be aware of the National Food Crime Unit (22%, compared with 15% that are rated at 3+).

Figure 40: Proportion of respondents that are aware of the National Food Crime Unit, by nation, sector and FHRS rating (all respondents)



Unweighted sample bases in parentheses

E6. Are you aware of the National Food Crime Unit?

Nearly three-quarters of those aware of the National Food Crime Unit (72%) are aware that food crime can be reported anonymously to the National Food Crime Unit. This is a higher proportion than in 2018 (52%) and it suggests that while awareness of the Unit has not increased, knowledge of it may have improved.

There are no significant differences between groups of respondents, but there is a tendency to be more aware that food crime can be reported anonymously among respondents in Wales (89% of those aware of the National Food Crime Unit), those in food and beverage services organisations (76%) and where respondents have visited the FSA website (81%).

Imports and Exports

This chapter summarises import and export activity amongst micro and small food business operators (FBOs).

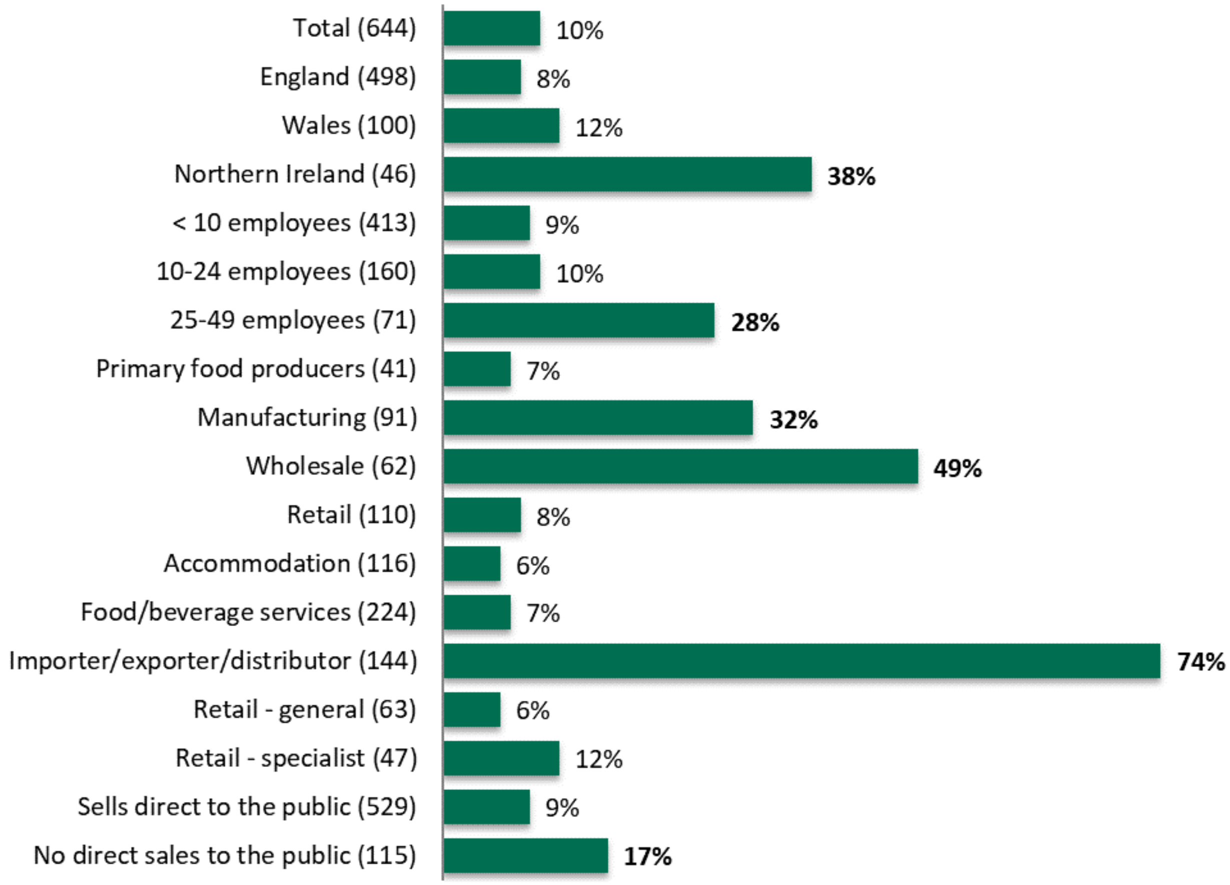
Summary: Imports and exports
10% of FBOs directly import any goods or services (15% in 2018).
Just 4% of FBOs exports any goods or services (3% in 2018).
The EU/Republic of Ireland is the most significant origin and destination for imports and exports.
FBOs based in Northern Ireland are more likely than those based in England and Wales to both import and export.

Imports

One in ten respondents (10%) report that their organisation directly imports any goods or services from a supplier, producer or wholesaler situated outside the UK. This compares with 15% in 2018. This proportion increases to 38% within Northern Ireland and is higher than average within larger FBOs (28% where 25-49 employees). By sector, the proportion increases to 49% of wholesalers and 32% of manufacturers.

Reflecting the dominance of wholesale among importers, FBOs with no direct sales to the public are significantly more likely than those that do sell directly to the public to import (17%, compared with 9%).

Figure 41: Proportion of FBOs that currently directly import or purchase any goods or services from a supplier, producer or wholesaler situated outside the UK (all respondents)



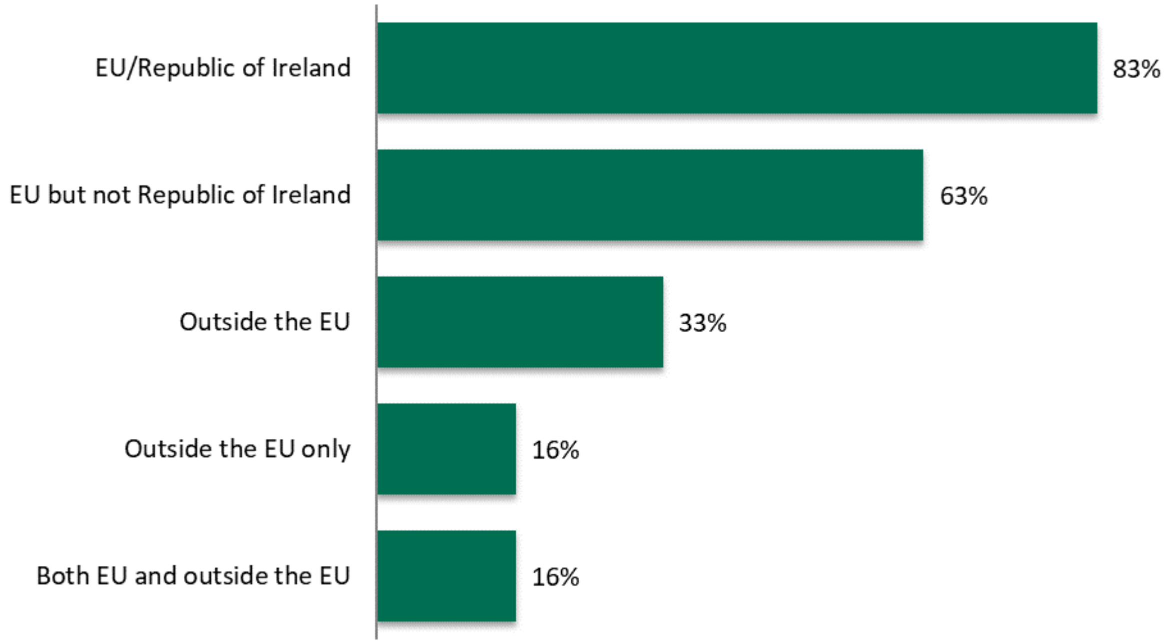
Unweighted sample bases in parentheses

F1A. Does your business currently directly import or purchase any goods or services from a supplier, producer or wholesaler situated outside the UK?

Figures in bold are statistically significantly higher than the total minus the sub-group tested to a 95% significance level

Looking at from where FBOs import, the EU is the main geographic source. More than four in five FBOs that import buy from suppliers, producers or wholesalers based in the EU including Republic of Ireland (83%), which includes more than three in five importers that import from the EU but not Republic of Ireland (63%). A third of importers buy from outside the EU (33%), which includes 16% that import from outside the EU only.

Figure 42: Locations from which FBOs import (where import)



Unweighted sample base = 103

F1. ..are these overseas suppliers, producers or wholesalers based…?

As a proportion of all FBOs, 8% import from the EU including Republic of Ireland. This increases to 32% in Northern Ireland where 19% of all FBOs import from Republic of Ireland but not from elsewhere in the EU. Just 3% of all FBOs import from outside the EU with half these organisations only importing from outside the EU.

By sector, more than two-fifths of wholesalers import from the EU including Republic of Ireland (43%), and nearly a third of manufacturers do so (30%). FBOs that import from outside the EU are in the minority, accounting for one in seven wholesalers (14%) and one in nine manufacturers (11%). See

A24 [23] (annex 1) for more detail.

[23] [CTRL + CLICK] on blue text to go to detailed information if viewing digitally.

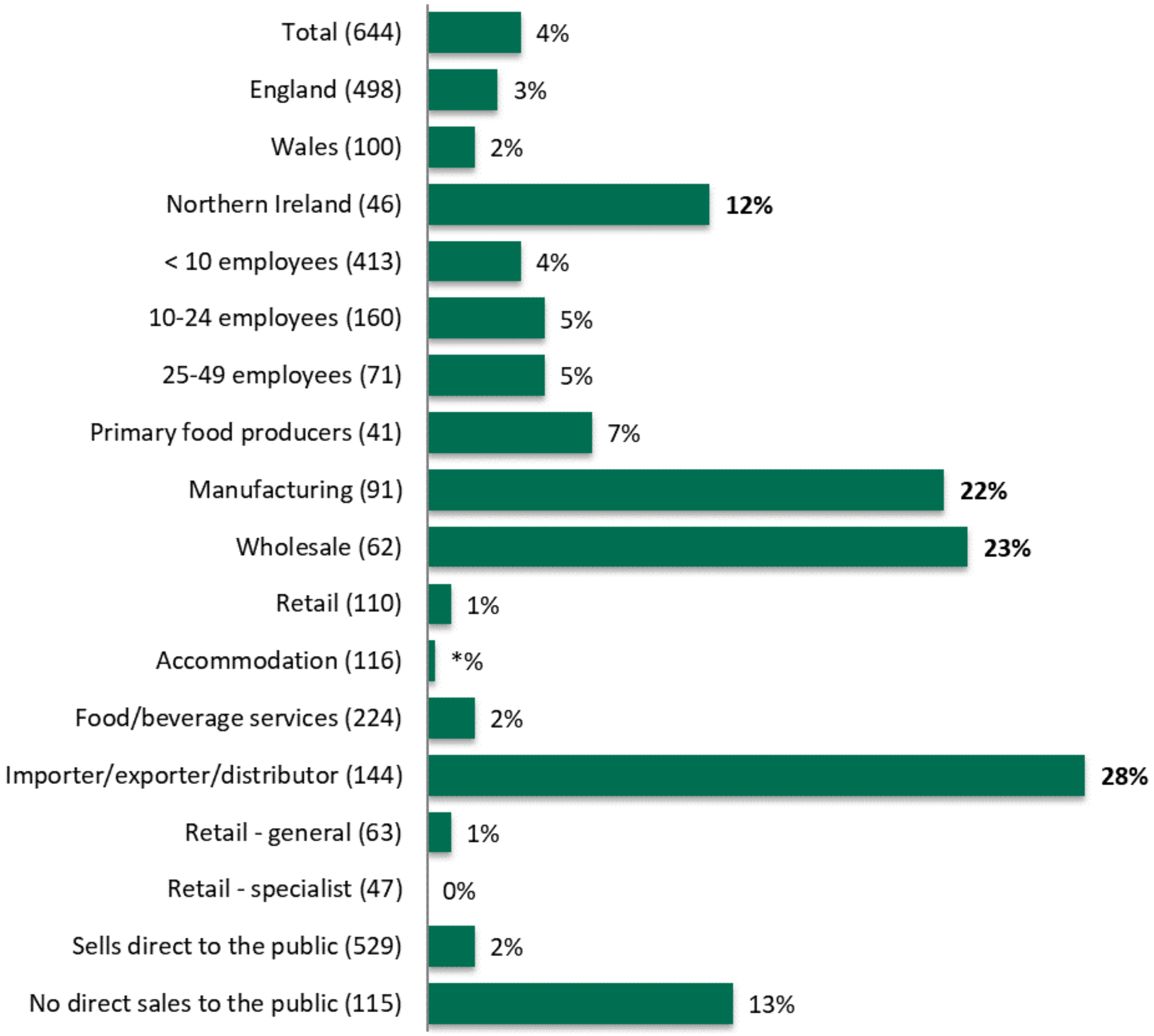
Exports

Export activity is much less common than the UK average[24] at just 4% of micro and small FBOs (3% in 2018). As noted in 2018, this is likely to reflect the fact that a large proportion of the business population provides at-site food and beverage services and/or accommodation or are selling products to walk-in customers or bringing products into the country to supply retailers and service businesses.

Exporting is more prevalent among manufacturers (22%) and wholesalers (23%), who are predominantly importers, are also significantly more likely than average to export.

[24] BEIS LSBS (Small Business Survey) 2018 reported that 18% of UK micros (2-9 employees and 25% of UK small (10-49 employees) export.

Figure 43: Proportion of businesses that export any products outside the UK (all respondents)



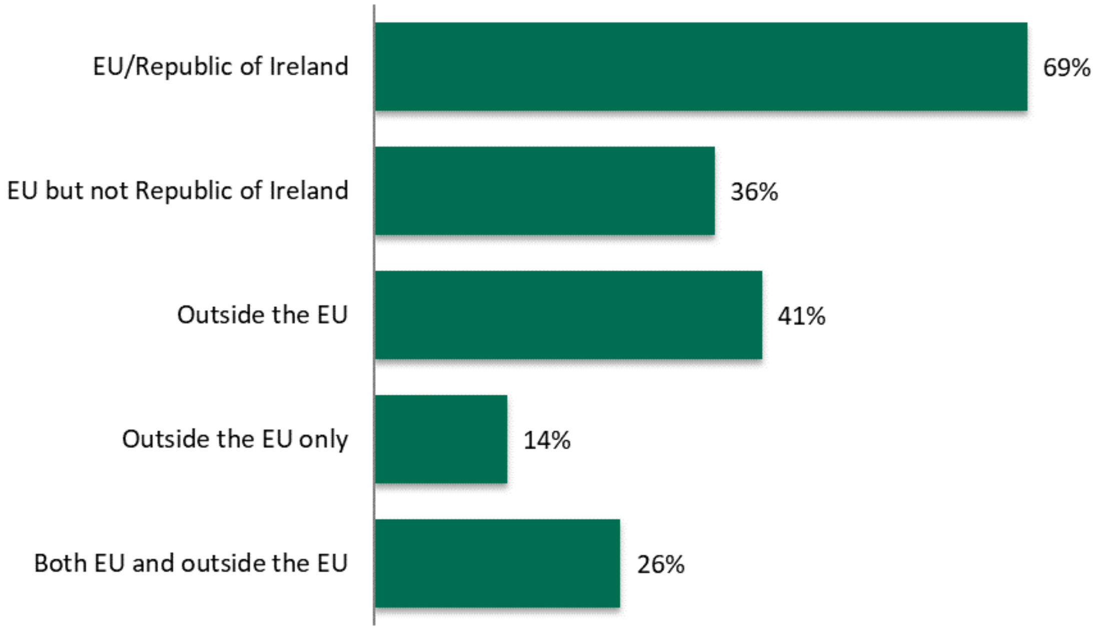
Unweighted sample bases in parentheses * denotes less than 0.5%

F2a. Does your business export any products outside of the UK? This could include commissions, royalties and licences?

Figures in bold are statistically significantly higher than the total minus the sub-group tested to a 95% significance level

EU, including Republic of Ireland is the main destination for exports (69% of exporters), with just over a third of all exporters (36%) serving EU markets excluding Republic of Ireland. Destinations outside the EU are more important to exporters than importers, with around two-fifths of exporters selling to markets outside the EU (41%), with a quarter of exporters (26%) selling to markets both within and outside the EU and 14% only exporting to market outside the EU.

Figure 44: Locations to which businesses export (where export)



Unweighted sample base = 43

F2. ..are these overseas customers and suppliers based…?

IT Systems and Facilities

This chapter summarises the use of IT systems and facilities across micro and small food business operators (FBOs).

Summary: IT systems and facilities
Seven in ten respondents (71%) report that their organisation has one or more of a range of specified IT systems and facilities, with finance systems and software being the most common (64%). Around two-fifths of respondents report that their organisation has operations computer systems and software (42%) and/or systems and software relating to staffing (38%).

Use of IT systems and software

Respondents were asked if their organisation has computer systems or software relating to the management of operations, staffing or finance. Seven in ten respondents reported that their organisation has one or more of a range of specified IT systems and facilities (71% do so), finance systems being the most common (64%). Around two in five respondents report operations computer systems and software within their organisation (42%) and/or systems and software relating to staffing (38%).

The propensity to have any of these computer systems and software increases with organisation size; 97% of larger FBOs (25-49 employees) have any, compared with 67% of micro FBOs (less than 10 employees). Multi-site FBOs are significantly more likely than single site FBOs to have any computer systems and software in place for these functions. FBOs with a website are significantly more likely than average to have any of these systems, but having a social media presence or making sales online are not significant factors it would appear.

Businesses within wholesale, manufacturing and accommodation sectors are significantly more likely than average to have one or more functions covered by computer systems and software (89%, 91% and 82% respectively). The proportion is lower than average within food and beverage services businesses (66%) and relatively low among primary food producers (70%).

See *A25* and

A26 [25](annex 1) for more detail.

[25] [CTRL + CLICK] on blue text to go to detailed information if viewing digitally.

FBO Profile

This chapter summarises the characteristics of micro and small food business operators (FBOs) as represented by survey respondents. The data is weighted to the latest available ONS IDBR[26] statistics (March 2018 at the time of the survey) relating to organisation size, sector and nation. The weighting process is explained in more detail in the Background chapter of this report. On this basis, the profile of the sample as described should therefore be a reliable description of the actual in-scope business population.

It should be noted that franchises were excluded from the survey.

Number of sites

The vast majority of FBOs are single site establishments (96%). This reflects the exclusion of FBOs with 50 or more employees from the survey.

Of those with more than one site, the majority (3% of all) have two sites, and the remainder (1%) have more than two.

Three in ten FBOs with 25-49 employees has more than one site (30%).

Less than 1% of FBOs reported having mobile or temporary premises at the time of the survey.

Number of employees

The majority of FBOs employ fewer than 10 employees across all sites (79%). Around two-thirds of these employ fewer than 5 employees (53% of all).

One in six FBOs (17%) employ between 10 and 24 employees, and the remaining minority (4%) employ between 25 and 49.

Micro FBOs are classified as those employing fewer than 10 employees across all sites, while those employing between 10 and 49 staff are classified as Small.

Small FBOs are more heavily represented within accommodation (43%) and manufacturing (34%) sectors. A significantly higher proportion of FBOs than average employ between 25 and 49 staff within accommodation (16%) and manufacturing (11%).

[26] Office for National Statistics, Inter-Departmental Business Register

A third of multi-site FBOs (31%) employ between 25 and 49 staff.

Table 1: Organisation size, by sector (all respondents)

	Total	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services
(Micro) <5 employees	53%	80%	44%	42%	55%	37%	47%
(Micro) 5-9 employees	26%	10%	22%	30%	31%	20%	29%
Summary: Micro	79%	90%	66%	72%	86%	57%	76%
(Small) 10-24 employees	17%	10%	23%	21%	12%	27%	20%
(Small) 25-49 employees	4%	0%	11%	7%	2%	16%	4%
Summary: Small	21%	10%	34%	28%	14%	43%	24%
Unweighted bases	644	41	91	62	110	116	224

S5. How many employees, including yourself, work for your business, including at all business locations?

Sector

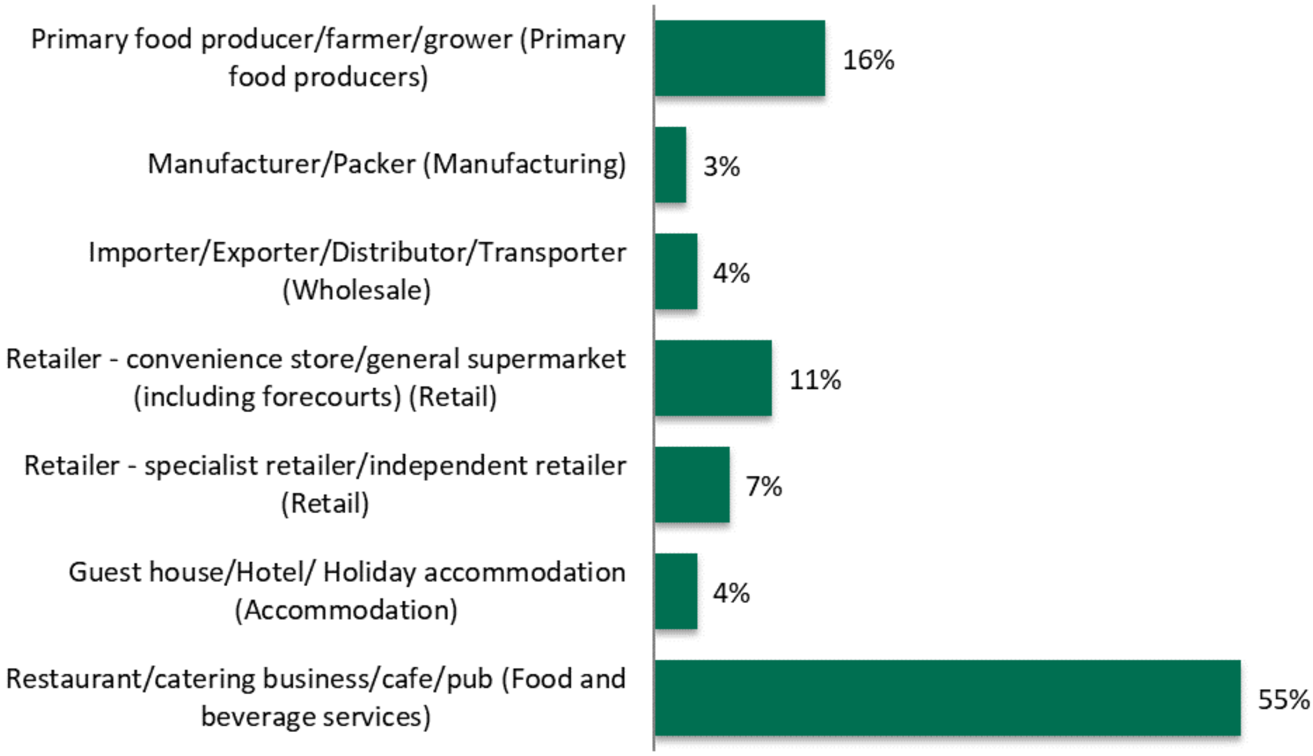
More than half of in-scope FBOs operate within food and beverage services (55%). FBOs that are mainly classified as accommodation businesses account for just 4% of all in-scope FBOs, with similar proportions accounted for by food wholesalers (4%) and manufacturers (3%).

Food retailers (both general and specialised retailers) account for one in six FBOs (17%) and primary food producers account for another one in six (16%).

Within the sample, general food retailers, which include convenience stores and small supermarkets, account for 7% of all FBOs, and specialist, independent retailers account for 11%[27].

The majority of FBOs sell direct to the public (82%), with the proportion actually varying considerably by sector. As one would expect, all retail and most food/beverage businesses sell direct to the public, but the proportions are significantly lower than average within the primary food production sector (31%), amongst wholesalers (38%) and manufacturers (65%).

Figure 45: Sector and sub-sector (all respondents)



Unweighted sample base = 644

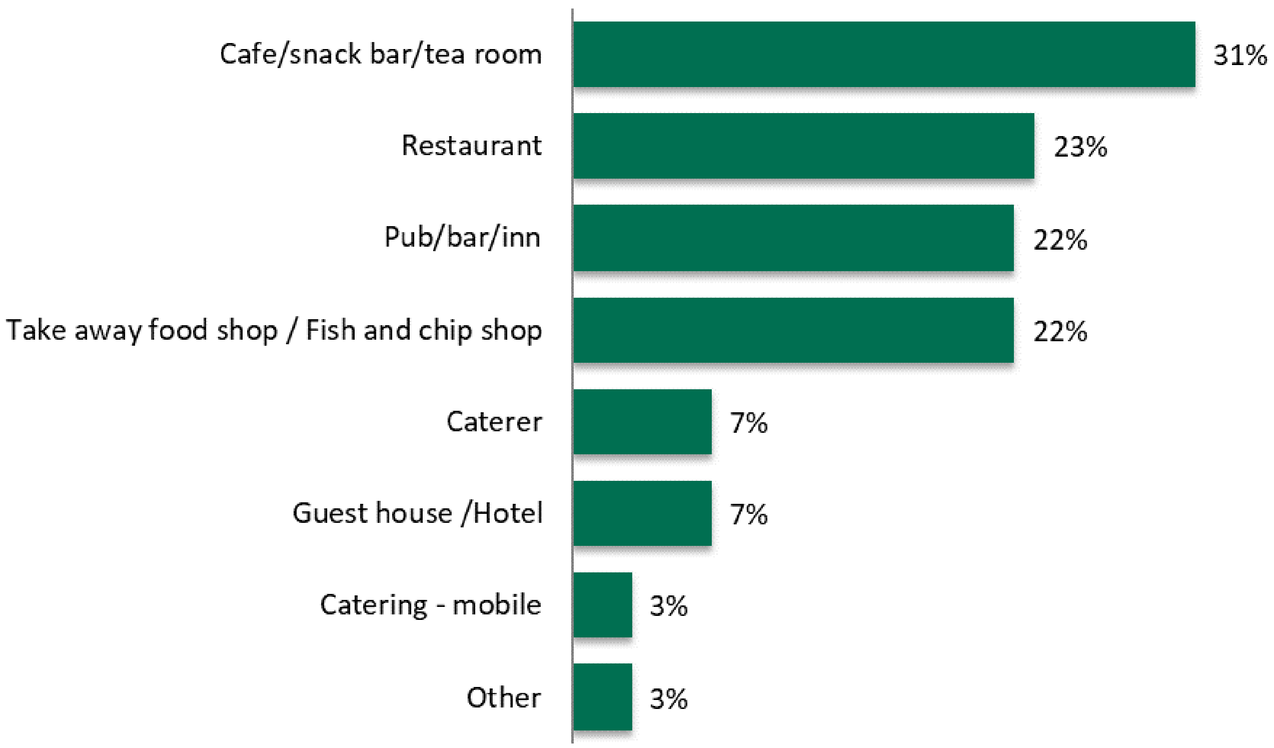
[27] Rounded up – sum of both figures is 17%.

Type of FBO (accommodation/food and beverage services)

Respondents within accommodation and food and beverage services organisations were asked to describe the kind of restaurant or catering business they work for or own. A third (31%) described themselves as a café, snack bar or tea room, while around a fifth in each case described their organisation as a public house, bar or inn (22%); restaurant (23%) or take away food shop or fish and chip shop (22%). Fewer respondents (7%) described their organisation as a guest house or hotel or a caterer (10%), including 3% that offer mobile catering services (3%).

There is some overlap between accommodation and food and beverage services, as organisations in each sector can provide both of course. In providing a response to this question, some respondents in the accommodation sector focused on the restaurant/food service elements of their organisations rather than the accommodation aspects - and vice versa.

Figure 46: Description of restaurant or catering business (accommodation/food and beverage services sectors)



Unweighted sample base = 340

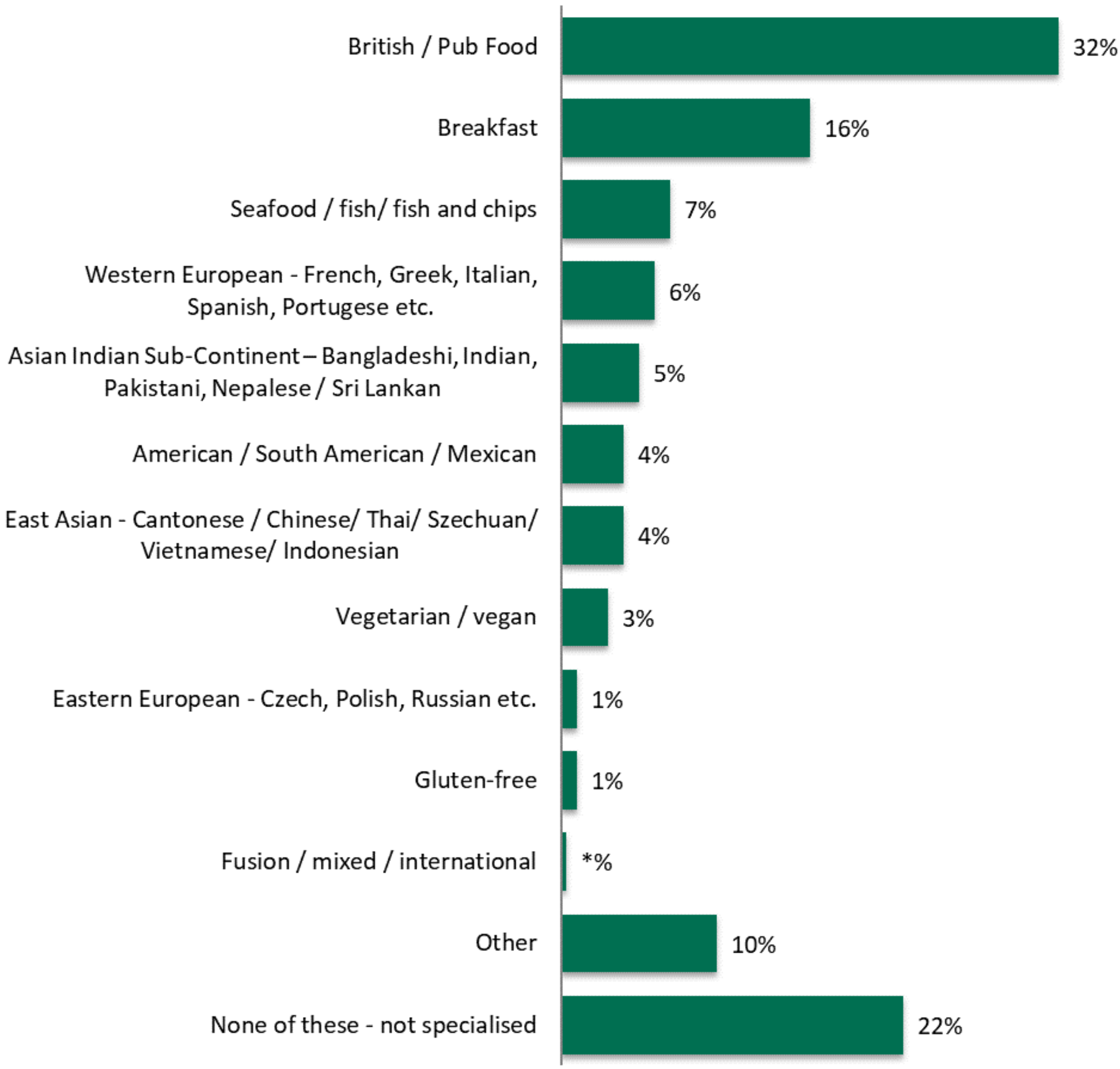
A3. How would you describe the kind of restaurant or catering business you work for/own?

In terms of the particular cuisines that accommodation and food and beverage services organisations specialise in, the most frequently mentioned is British or ‘Pub’ food (32%). This would include traditional ‘Pub’ fayre such as Sunday roasts, meals with chips, but also full English breakfasts and such menus are also likely to include less traditional choices such as pasta and curry dishes, as well as burgers[28].

Next most frequently cited is breakfast (16%), which reflects the food provided by hotels, guest houses and the like. More than a fifth (22%) reported that their establishment does not specialise, or that they found it difficult to classify the cuisine they offer.   This is sure to include some accommodation establishments that offer general ‘Pub’ food which can be very varied as previously mentioned.

[28] This is based on a manual check of websites of randomly selected cases

Figure 47: Type of cuisine specialised in (accommodation/food and beverage services sectors)



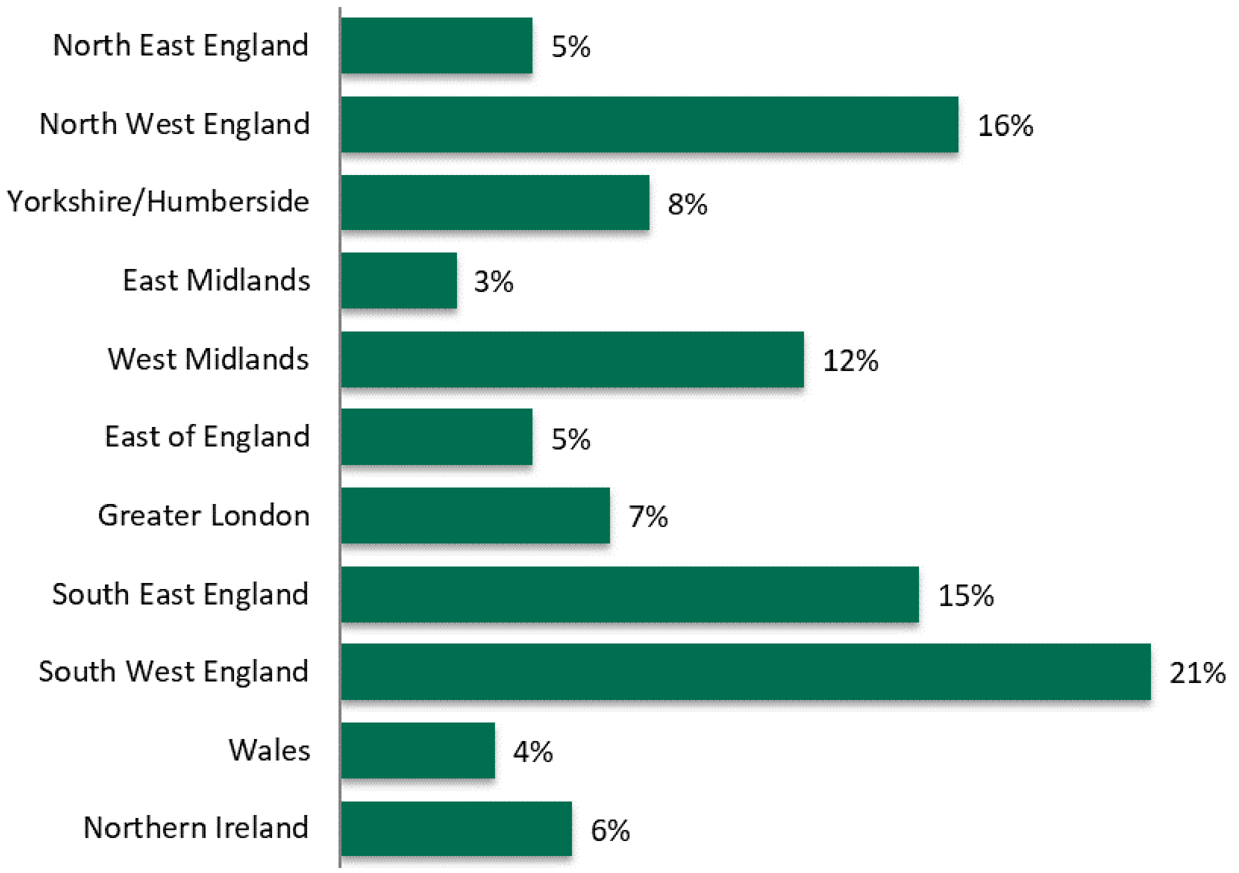
Unweighted sample base = 340 * denotes less than 0.5%

A4. What, if any, particular cuisines do you specialise in?

Geographic location

Respondents were asked about the areas of the UK in which their organisation has sites and given that the vast majority of FBOs have only one site, there were very few that mentioned more than one area. Even multi-site FBOs might only have sites in one area of the UK, particularly if they employ fewer than 50 staff and operate on a relatively small scale.

Figure 48: Area of the UK in which FBOs are based (all respondents)



Unweighted sample base = 644

A8. In which area of the UK is your organisation based? [please tell us all the areas in which you have sites]

Years established

Respondents were asked how long their organisations has been trading. In the case of multi-site FBOs, from when their first site was established.

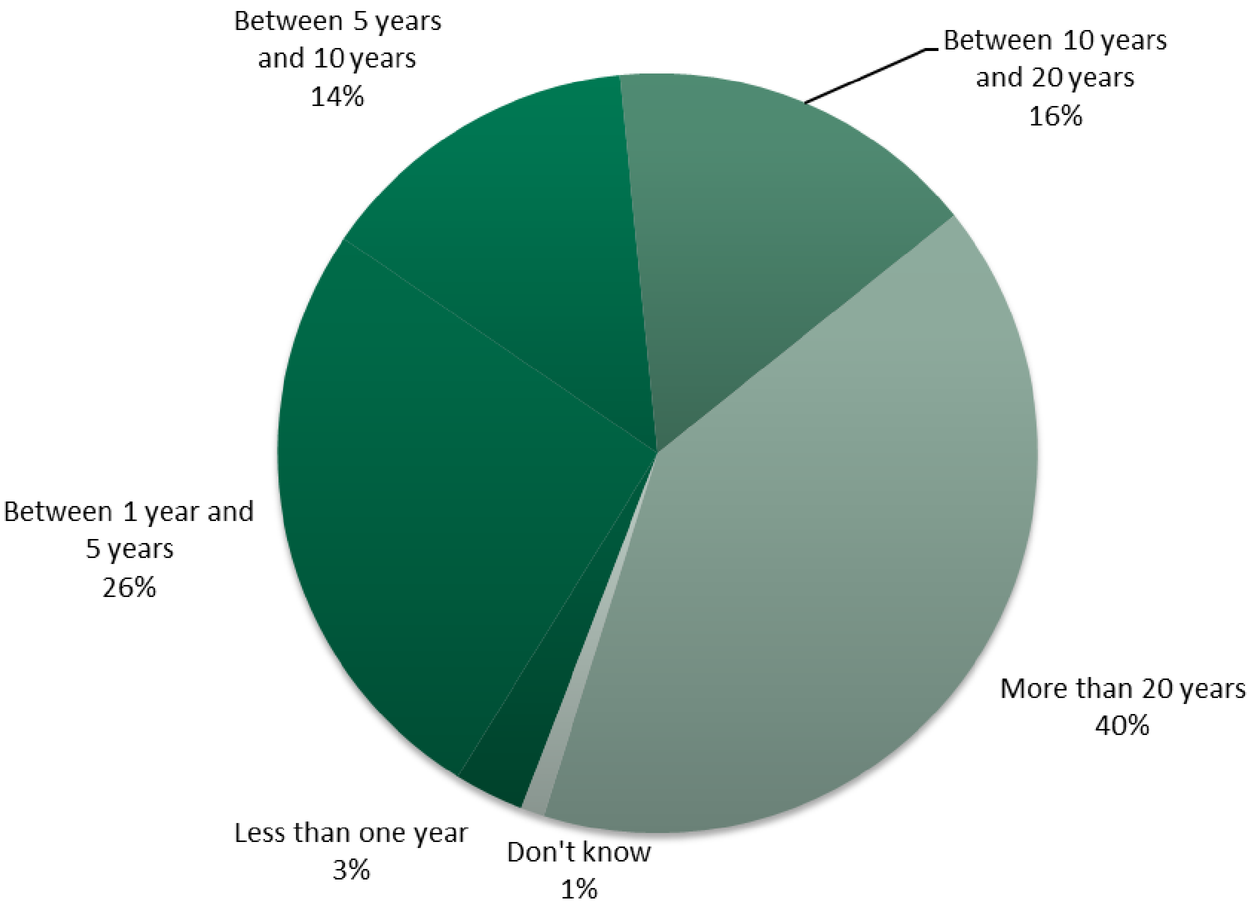
More than half the FBOs (57%) have been trading for at least 10 years, including 41% of all that have been trading for more than 20 years.

The longest established FBOs are to be found within the 25-49 employee size band (69% have been trading for more than 10 years); and more than three-fifths of multi-site FBOs (63%) have been trading for more than 20 years.

Longer established FBOs are most prevalent within the primary sector (92% have been trading for more than 20 years) and wholesale (61%). This contrasts with only around a quarter of food and beverage services organisations (26%).

Around three in ten FBOs have been trading for no more than 5 years (29%), which includes just 3% that are newly established in the last year. The proportion of young FBOs (i.e. up to 5 years old) increases to 38% of food and beverage services organisations.

Figure 49: Years established (all respondents)



Unweighted sample base = 644

A5. In which area of the UK is your organisation based? [please tell us all the areas in which you have sites]

Legal status

When asked to indicate the legal status of their organisations, around a third of respondents reported that it is a private limited company (31%), while around a quarter classified their organisation as a partnership (28%) or a sole proprietorship[29] (25%). Reflecting the fact that all FBOs surveyed had fewer than 50 employees, very few report other, less common, legal statuses such as private company limited by guarantee (5%); public limited company (1%); limited liability partnership (1%); private unlimited company (1%) or community interest company (1%).

FBOs with between 25 and 49 employees are very unlikely to be sole proprietorships (less than 1% are). They are significantly more likely than average to be private limited companies (68%).

FBOs with fewer than 10 employees are equally likely to be partnerships (30%) and sole proprietorships (29%), with slightly fewer as private limited companies (27%).

Table 2: Legal status of the organisation by organisation size

	Total	<10 employees	10-24 employees	25-49 employees
Private limited company, limited by shares (LTD.)	31%	27%	**41%**	**68%**
Partnership	28%	**30%**	21%	7%
Sole proprietorship	25%	**29%**	16%	*%
Private company limited by guarantee	5%	6%	2%	1%
Public Ltd Company (PLC)	1%	1%	2%	1%
Limited liability partnership	1%	*%	2%	1%
Private Unlimited Company	1%	1%	1%	1%
Community Interest Company (CIC, limited by guarantee or shares)	*%	*%	0%	0%
Other	3%	3%	3%	2%
Don't know	5%	2%	11%	18%
Unweighted bases	644	413	160	71

* denotes less than 0.5%

[29] Sole proprietorship is a legal status and does not mean that there are no employees. It is an unlimited business with one person at its' head.

Figures in **bold** are statistically significantly higher than the total minus the sub-group tested to a 95% significance level

Online sales

Nearly three-quarters of all FBOs have a business email address (72%) and nearly two-thirds (64%) have a social media account of some sort, e.g. Twitter; Facebook; Instagram etc.

Around half of all FBOs have a website (51%) and three in ten of these (30%; 15% of all FBOs) serve customers directly via that website i.e. have an e-commerce element to their organisations.

A similar proportion of all FBOs (15%) serve customers via the internet using third-party website.

Overall, more than four-fifths of FBOs (84%) have an online presence to some extent. Just over half of all respondents (52%) were able to provide an estimate of their online sales, with a third of all respondents (33%) reporting none and 15% unable to provide an estimate.

Of those able to estimate the contribution of online sales to their overall turnover, 61% reported some contribution; with around half (52%) estimating that online sales make up a quarter of their sales overall. Just 4% reported online sales accounting for more than half their overall sales.

The propensity to have a presence on the internet, whether in the form of a website or social media account, increases with organisation size, although smaller FBOs are not lagging as far behind larger ones with regard to having social media accounts and email addresses. Just one in eight FBOs with fewer than 10 employees serve customers directly via their own website (12%) or via the internet using a third-party website (13%), compared with two-fifths (40%) and a third (33%) respectively of FBOs with between 25 and 49 employees.

By sector, an internet presence of some description is universal among FBOs offering accommodation; with 98% of these having a website. Manufacturers are also significantly more likely than average to have a website (88%).

While less likely than FBOs in the accommodation or manufacturing sectors to have a website (57%), the majority of food and beverage organisations (80%) have a social media account.

Two-thirds of accommodation businesses serve customers through their online presence; 68% do so directly via their website, while 69% do so via a third-party website. More than two-fifths of manufacturers (44%) do business via their website but use of third-party websites is much less common in this sector (23%).

Primary food producers are particularly low users of online channels, although two-thirds (68%) do have a business email address.

In terms of having online sales, despite a lower propensity than accommodation businesses and manufacturers to have a website, food and beverage organisations are as likely as manufacturers to report some online sales (79%, compared with 76%), although considerably less likely than accommodation businesses to rely on them: just 3% of food and beverage organisations report online sales contributing more than half to their overall sales, compared with 42% of accommodation businesses. Among manufacturers the majority report that online sales contribute no more than half of their overall sales (80%).

Table 3: Internet presence and online sales, by organisation size and sector

	Total	**< 10 employees**	**10-24 employees**	**25-49 employees**	**Primary food producers**	**Manufacturing**	**Wholesale**	**Retail**	**Accommodation**	**Food/beverage services**
Have a website	51%	45%	**69%**	**95%**	21%	**88%**	**66%**	38%	**98%**	**57%**
Have a business email address	72%	68%	**85%**	**100%**	68%	**96%**	**89%**	69%	**98%**	70%
Have social media accounts	64%	58%	**81%**	**90%**	19%	**78%**	50%	49%	**82%**	**80%**
Serve customers directly via your website	15%	12%	**23%**	**40%**	3%	**44%**	**27%**	7%	**68%**	15%
Serve customers via the Internet using a third-party website	15%	13%	**21%**	**33%**	3%	23%	9%	2%	**69%**	18%
Some internet presence	84%	80%	**98%**	**100%**	68%	96%	92%	88%	100%	88%
No online sales (where provided a response)	39%	**46%**	19%	9%	**86%**	24%	50%	58%	8%	21%
Up to half of all sales online	57%	13%	**81%**	**78%**	14%	**80%**	51%	42%	46%	**76%**

	Total	< 10 employees	10-24 employees	25-49 employees	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services
(where provided a response)										
More than half of all sales online (where provided a response)	4%	3%	1%	**13%**	0%	2%	0%	0%	42%	3%
Any online sales (where provided a response)	61%	54%	**81%**	**100%**	14%	**76%**	50%	42%	**92%**	**79%**
Unweighted bases	644	413	160	71	41	91	62	110	116	224

Figures in **bold** are statistically significantly higher than the total minus the sub-group tested to a 95% significance level

Packaging and food preparation

Respondents were asked to describe the way in which food and drink products are distributed or sold by their establishment. This was mainly to determine what rules and regulations they would need to follow with regard to food safety and, particularly, providing information on potential allergens in the products they sell.

Approaching two-thirds of respondents (65%) reported that their organisation sells its food and drink products unpackaged, i.e. loose or sold as a meal, including as a takeaway, with a further 9% reporting that their produce (livestock, crops and so on) is sold unpackaged (but really this question was inapplicable to them).

A third (32%) reported that their food and drink products are sold pre-packed, as received from the manufacturer; while fewer (19%) reported food and drink products being packaged for sale on their premises.

The way in which food and drink products are sold is entirely driven by sector and the nature of the organisation. However, a wider range of formats is reported within wholesale and retail sectors while one in four accommodation and food and beverage organisations, while reporting mostly unpackaged products (i.e. meals) also sell supplementary pre-packed food and drink products.

Table 4: Ways in which food and drink products are distributed or sold by establishments, by sector

	Total	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services
Pre-packed, received from a manufacturer, not made at our premises	32%	18%	25%	**53%**	**71%**	26%	23%
Pre-packed for direct sale on our premises	19%	13%	**70%**	**43%**	25%	17%	14%
At the consumer's request/sold loose/sold as a meal e.g. including as a takeaway	65%	31%	28%	21%	36%	**92%**	**88%**
Livestock, crops etc... - unpackaged	9%	**58%**	2%	4%	0%	0%	0%
Other	1%	0%	*%	2%	0%	4%	2%
Unweighted Bases	644	41	91	62	110	116	224

* denotes less than 0.5%

Figures in **bold** are statistically significantly higher than the total minus the sub-group tested to a 95% significance level

Thus, there is a need to ensure that packaging is labelled correctly, in line with food safety regulations, within 19% of organisations and this is most applicable to manufacturers (70%) and wholesalers (43%).

For nearly two-thirds of organisations (65%) and the vast majority of accommodation businesses (92%) and food and beverage services organisations (88%) that sell food and drink products loose or as a meal, information relating to potential allergens needs to be made available in other ways.

Focusing on those FBOs that sell direct to the public, nearly three-quarters (73%) sell food and drink products loose, including (mainly) as a meal (or takeaway meal). One in five (20%) package products at their premises and therefore need to include certain information on the packaging, while a third of businesses selling to the public (34%) sell on products that arrive already packaged.

Annex 1: Detailed data

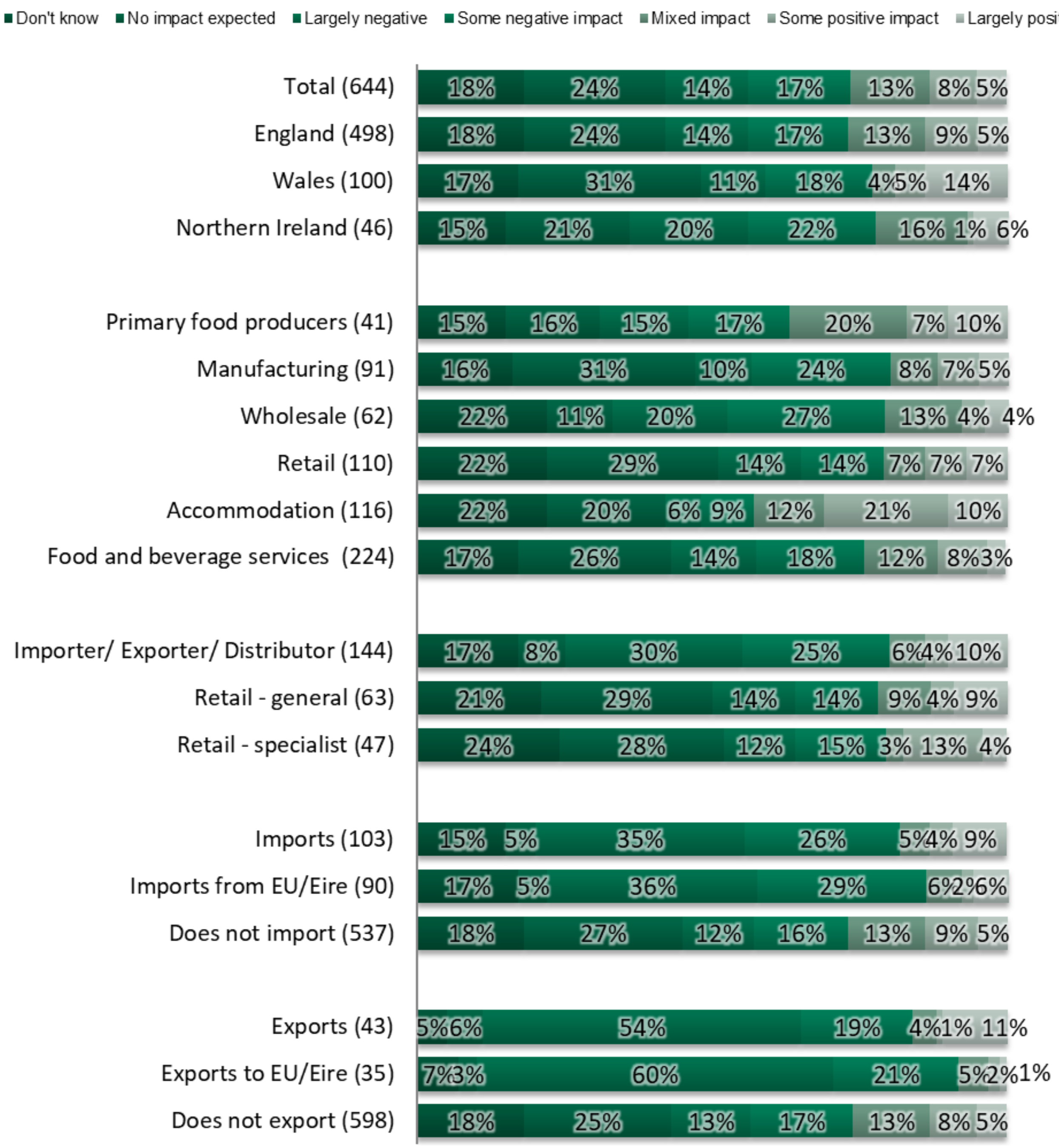
Question numbers refer to the system used in the original questionnaire.

A5: Concerns, threats or barriers to the success of businesses, by sector – prompted, multiple response (all respondents)

	Total	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services
Competition in the market	43%	39%	**55%**	**64%**	49%	44%	40%
Taxation, VAT, PAYE, National Insurance, business rates	40%	38%	38%	25%	37%	**50%**	42%
The UK exit from the EU	35%	**60%**	37%	**49%**	31%	31%	28%
The number of unnecessarily burdensome regulations	29%	**64%**	**45%**	35%	30%	37%	18%
Staff recruitment and skills	28%	23%	31%	27%	17%	**37%**	**31%**
National Living Wage	28%	21%	21%	33%	28%	36%	30%
Lack of adequate broadband	25%	47%	29%	27%	17%	30%	20%
Meeting regulatory requirements	22%	39%	33%	25%	21%	27%	17%
Availability/cost of suitable premises	19%	23%	22%	22%	16%	17%	19%
Late payment	18%	**28%**	**38%**	**46%**	19%	11%	12%
Workplace pensions	16%	12%	11%	21%	14%	19%	17%
Obtaining finance	14%	10%	**27%**	15%	13%	14%	16%
Any other major issues or obstacles	11%	17%	5%	8%	10%	7%	10%
None of these	19%	5%	8%	9%	24%	16%	23%
Unweighted bases	644	41	91	62	110	116	224

B2. I'm now going to read out a list of possible concerns, threats or barriers to the success of your business, please tell me which apply to your business? Statistically higher than average responses are highlighted in **bold**. 36 [30]

50: Anticipated impact of the UK's exit from the EU on the business, by nation, sector and overseas trading (all respondents)



[30] [CTRL + CLICK] on the blue text to return to original reference point

Unweighted sample bases in parentheses

B3. Over the next couple of years do you expect the UK's exit from the EU to have a negative or positive impact on your business? *38*

A6a: Extent to which respondents agree or disagree that regulations are effective at protecting the public, by sector and FHRS rating (all respondents)

	2019	2018	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services	FHRS rating 0-2	FHRS rating 3+
Strongly disagree	*%	4%	0%	**3%**	**2%**	1%	1%	0%	0%	0%
Slightly disagree	1%	4%	0%	0%	0%	3%	3%	1%	0%	1%
Slightly agree	14%	28%	10%	14%	14%	17%	19%	15%	18%	16%
Strongly agree	82%	62%	88%	82%	79%	78%	75%	83%	82%	81%

C1. To what extent do you agree or disagree with the following statements...['regulations are effective at protecting the public']? *denotes less than 0.5% ***Error! Reference source not found.Error! Bookmark not defined.*** [31]

Statistically higher than average responses are highlighted in **bold**.

A7b: Extent to which respondents agree or disagree that regulations are reasonable for food businesses, by sector and FHRS rating (all respondents)

	2019	2018	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services	FHRS rating 0-2	FHRS rating 3+
Strongly disagree	1%	3%	2%	1%	2%	1%	2%	*%	0%	*%
Slightly disagree	2%	4%	0%	3%	3%	6%	4%	*%	3%	1%
Slightly agree	23%	31%	23%	18%	17%	28%	26%	22%	19%	24%
Strongly agree	72%	59%	67%	73%	70%	64%	65%	**76%**	78%	73%

[31] [CTRL + CLICK] on the blue text to return to original reference point

	2019	2018	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services	FHRS rating 0-2	FHRS rating 3+
Unweighted bases	644	530	41	91	62	110	116	224	30	368

C1. To what extent do you agree or disagree with the following statements...[' regulations are reasonable for food businesses']? *denotes less than 0.5% ***Error! Reference source not found.Error! Bookmark not defined.*** [32]

Statistically higher than average responses are highlighted in **bold**.

A8: Extent to which respondents agree or disagree that the processes in place to ensure food businesses keep to the regulations are conducted fairly, by sector and FHRS rating (all respondents)

	2019	2018	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services	FHRS rating 0-2	FHRS rating 3+
Strongly disagree	4%	11%	5%	9%	6%	6%	3%	3%	14%	3%
Slightly disagree	3%	15%	0%	3%	1%	4%	5%	4%	3%	4%
Slightly agree	23%	30%	22%	32%	28%	28%	21%	22%	30%	23%
Strongly agree	**66%**	42%	61%	54%	63%	60%	67%	**70%**	54%	69%
Unweighted bases	644	530	41	91	62	110	116	224	30	368

C1. To what extent do you agree or disagree with the following statements...? *50*

[32] [CTRL + CLICK] on the blue text to return to original reference point

Statistically higher than average responses are highlighted in **bold**.

A9: Extent to which respondents agree or disagree that the processes in place to ensure food businesses keep to the regulations help to ensure the worst performing food businesses will improve, by sector and FHRS rating (all respondents)

	2019	2018	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services	FHRS rating 0-2	FHRS rating 3+
Strongly disagree	3%	4%	0%	5%	3%	4%	3%	3%	6%	3%
Slightly disagree	5%	9%	7%	2%	**14%**	5%	8%	3%	3%	3%
Slightly agree	27%	32%	34%	31%	22%	34%	23%	24%	35%	26%
Strongly agree	61%	50%	51%	46%	53%	52%	58%	**68%**	55%	**65%**
Unweighted bases	644	530	41	91	62	110	116	224	30	368

C1. To what extent do you agree or disagree with the following statements...? ***Error! Bookmark not defined.***

Statistically higher than average responses are highlighted in **bold**.

A10: Extent to which respondents agree or disagree that the paperwork involved in keeping to the regulations is reasonable, by sector and FHRS rating (all respondents)

	2019	2018	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services	FHRS rating 0-2	FHRS rating 3+
Strongly disagree	8%	13%	13%	7%	12%	9%	9%	6%	6%	6%
Slightly disagree	12%	13%	**38%**	12%	11%	7%	11%	6%	0%	7%
Slightly agree	33%	34%	29%	**44%**	36%	35%	35%	33%	29%	34%
Strongly agree	46%	38%	18%	37%	37%	46%	43%	**55%**	62%	52%
Unweighted bases	644	530	41	91	62	110	116	224	30	368

C1. To what extent do you agree or disagree with the following statements...? *51*

Statistically higher than average responses are highlighted in **bold**.

A11: Extent to which respondents agree or disagree that the information on food safety and hygiene is easy to find and access, by sector and whether the business directly serves the public (all respondents)

	2019	2018	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services	Sells direct to public	No direct sales to public
Strongly disagree	3%	6%	5%	**8%**	2%	2%	2%	2%	2%	**6%**
Slightly disagree	7%	7%	10%	11%	7%	8%	5%	6%	6%	10%
Slightly agree	24%	24%	**39%**	19%	33%	**33%**	24%	16%	23%	28%
Strongly agree	65%	62%	41%	53%	54%	55%	66%	**76%**	**68%**	48%
Unweighted bases	644	530	41	91	62	110	116	224	30	368

C1. To what extent do you agree or disagree with the following statements...? *51*

Statistically higher than average responses are highlighted in **bold**.

A12a: Extent to which respondents are certain that all food businesses are doing what they should be with regard to food safety, by nation and sector (all respondents). Table A8a: 'Make sure food is safe to eat'.

	2019	2018	England	Wales	Northern Ireland	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services
Very uncertain	4%	7%	4%	3%	6%	3%	3%	2%	2%	6%	4%
Quite uncertain	12%	16%	12%	12%	11%	20%	11%	8%	13%	12%	10%
Uncertain	16%	23%	16%	15%	18%	23%	14%	10%	15%	18%	15%
Quite certain	34%	42%	34%	**44%**	26%	22%	42%	41%	29%	40%	37%
Very certain	47%	30%	47%	38%	56%	51%	42%	47%	53%	35%	46%
Certain	81%	72%	81%	82%	82%	72%	84%	88%	81%	75%	83%

C3. Please tell me how certain or uncertain you are that all food businesses in this country are likely to be doing what they need to in order to...[Make sure food is safe to eat]? *56*

Statistically higher than average responses are highlighted in **bold**.

A13b: Extent to which respondents are certain that all food businesses are doing what they should be with regard to food safety, by nation and sector (all respondents). Table A8b: 'Withdraw/recall unsafe food and completing an incident report'.

	2019	2018	England	Wales	Northern Ireland	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services
Very uncertain	3%	8%	3%	2%	2%	0%	7%	2%	1%	5%	4%
Quite uncertain	15%	23%	15%	19%	10%	21%	17%	15%	14%	14%	13%
Uncertain	18%	31%	18%	20%	12%	21%	24%	18%	16%	19%	18%
Quite certain	36%	41%	36%	36%	35%	24%	38%	46%	34%	38%	39%
Very certain	37%	19%	37%	36%	33%	40%	30%	34%	41%	25%	36%
Certain	73%	60%	73%	71%	68%	65%	68%	79%	76%	63%	75%

C3. Please tell me how certain or uncertain you are that all food businesses in this country are likely to be doing what they need to in order to...[Withdraw/recall unsafe food and completing an incident report]'? *56*

Statistically higher than average responses are highlighted in **bold**.

A14c: Extent to which respondents are certain that all food businesses are doing what they should be with regard to food safety, by nation and sector (all respondents). Table A8c: 'Provide clear information on allergens'.

	2019	2018	England	Wales	Northern Ireland	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services
Very uncertain	6%	12%	7%	7%	0%	8%	10%	0%	5%	6%	7%
Quite uncertain	15%	24%	15%	17%	17%	18%	10%	16%	16%	18%	15%
Uncertain	22%	36%	22%	24%	17%	26%	20%	16%	20%	25%	22%
Quite certain	35%	33%	**36%**	37%	18%	33%	35%	37%	30%	42%	36%
Very certain	38%	27%	36%	36%	**63%**	28%	40%	41%	44%	22%	39%
Certain	73%	60%	72%	73%	81%	61%	75%	78%	75%	63%	75%
Unweighted bases	644	530	498	100	46	41	91	62	110	116	224

C3. Please tell me how certain or uncertain you are that all food businesses in this country are likely to be doing what they need to in order to...[Provide clear information on allergens]? *56*

Statistically higher than average responses are highlighted in **bold**.

A15a: Extent to which respondents are certain that all food businesses are doing what they should be with regard to food labelling, by nation, sector and by whether or not they sell directly to the public (all respondents). Table A9a: 'Make sure food is correctly labelled/what it says it is'

	2019	2018	England	Wales	Northern Ireland	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services	Sells Directly to public	Does Not sell directly to public
Very uncertain	5%	11%	5%	7%	0%	10%	**10%**	3%	3%	7%	4%	4%	8%
Quite uncertain	14%	22%	14%	15%	13%	23%	14%	14%	11%	16%	13%	11%	**28%**
Uncertain	19%	32%	20%	22%	13%	34%	25%	17%	14%	22%	17%	16%	36%
Quite certain	37%	**38%**	38%	34%	27%	25%	37%	39%	39%	41%	39%	37%	34%
Very certain	39%	24%	39%	36%	46%	33%	36%	42%	43%	24%	41%	**43%**	23%
Certain	76%	62%	77%	70%	73%	58%	73%	80%	82%	65%	80%	80%	57%

C3. Please tell me how certain or uncertain you are that all food businesses in this country are likely to be doing what they need to in order to...['Make sure food is correctly labelled/what it says it is']? *56*

Statistically higher than average responses are highlighted in bold.

A16b: Extent to which respondents are certain that all food businesses are doing what they should be with regard to food labelling, by nation, sector and by whether or not they sell directly to the public (all respondents). Table A9b: 'Make sure they don't mislead people by the way food is labelled, advertised or marketed'

	2019	2018	England	Wales	Northern Ireland	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services	Sells Directly to public	Does Not sell directly to public
Very uncertain	8%	15%	8%	6%	6%	**15%**	**18%**	7%	6%	9%	6%	7%	**14%**
Quite uncertain	17%	26%	17%	19%	19%	26%	16%	15%	13%	17%	16%	15%	**26%**
Uncertain	25%	41%	25%	25%	25%	41%	34%	23%	19%	27%	22%	22%	40%
Quite certain	38%	34%	38%	33%	26%	31%	30%	48%	36%	38%	39%	37%	39%
Very certain	33%	20%	33%	33%	39%	26%	29%	22%	41%	23%	34%	**36%**	17%
Certain	70%	54%	71%	66%	66%	57%	59%	70%	77%	60%	74%	74%	55%
Unweighted bases	644	530	498	100	46	41	91	62	110	116	224	529	115

C3. Please tell me how certain or uncertain you are that all food businesses in this country are likely to be doing what they need to in order to...['Make sure they don't mislead people by the way food is labelled, advertised or marketed']? *56*

Statistically higher than average responses are highlighted in bold.

A17: Extent to which respondents are certain that all food businesses are doing what they should be with regard to food product traceability, by nation, sector and FHRS rating (all respondents)

	2019	2018	England	Wales	Northern Ireland	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services	FHRS rating 0-2	FHRS rating 3+
Very uncertain	4%	10%	4%	5%	2%	3%	5%	0%	6%	6%	4%	0%	4%
Quite uncertain	15%	25%	15%	22%	4%	7%	21%	10%	18%	20%	16%	12%	16%
Uncertain	19%	36%	19%	26%	6%	10%	26%	10%	23%	25%	20%	12%	21%
Quite certain	39%	36%	38%	34%	49%	40%	34%	40%	30%	40%	41%	25%	41%
Very certain	35%	20%	35%	35%	38%	37%	32%	39%	40%	23%	33%	61%	32%
Certain	74%	57%	73%	69%	87%	77%	66%	79%	70%	63%	74%	85%	73%
Unweighted bases	644	530	498	100	46	41	91	62	110	116	224	30	368

C3. Please tell me how certain or uncertain you are that all food businesses in this country are likely to be doing what they need to in order to...[Keep records on where they got food from and show this information on demand – known as 'traceability']? *57*

A18: Extent to which respondents are certain that all food businesses are doing what they should be with regard to displaying their food hygiene scheme rating (if they sell directly to the public), by nation and sector (all respondents)

	2019	2018	England	Wales	Northern Ireland	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services
Very uncertain	4%	10%	4%	6%	0%	8%	**11%**	1%	4%	7%	2%
Quite uncertain	13%	20%	**14%**	9%	1%	18%	16%	13%	10%	12%	13%
Uncertain	17%	30%	18%	15%	1%	26%	27%	14%	14%	19%	15%
Quite certain	37%	30%	37%	35%	38%	34%	36%	41%	42%	39%	35%
Very certain	42%	35%	37%	35%	38%	30%	31%	34%	42%	33%	**48%**
Certain	79%	65%	78%	84%	92%	64%	68%	75%	84%	72%	83%
Unweighted bases	644	530	498	100	46	41	91	62	110	116	224

C3. Please tell me how certain or uncertain you are that all food businesses in this country are likely to be doing what they need to in order to...[Display their food hygiene scheme rating (if they sell food direct to the public)]? ***Error! Bookmark not defined.***

Statistically higher than average responses are highlighted in **bold**.

A19: Whether information on potential allergens is provided and how it is provided, unprompted, multiple response, by nation, sector and organisation size (all respondents)

	Total	Where provide information	England	Wales	Northern Ireland	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services	Micro (< 10 employees)	Small (10-49 employees
Provide information	69%	100 %	69%	**85%**	72%	21%	**81%**	41%	41%	**94%**	**92%**	65%	**85%**
… in writing on the ingredient list on the packaging	7%	10%	7%	7%	**15%**	7%	**33%**	6%	6%	9%	6%	7%	9%
… in writing elsewhere on the packaging	11%	16%	12%	15%	5%	0%	**38%**	19%	**20%**	12%	10%	11%	12%
… in writing on the menu/shelf	17%	25%	18%	17%	15%	0%	1%	3%	5%	**43%**	**26%**	17%	19%
… in writing as a separate notice on display	20%	29%	19%	**34%**	29%	5%	16%	12%	10%	**38%**	**27%**	19%	**26%**
… in writing in a folder provided to guests or in welcome letter/ information	17%	25%	17%	24%	22%	3%	3%	**7%**	6%	12%	**27%**	15%	**27%**
… in writing on purchasing/ order forms/	2%	2%	2%	1%	3%	2%	7%	1%	1%	0%	2%	2%	2%

	Total	Where provide information	England	Wales	Northern Ireland	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services	Micro (< 10 employees)	Small (10-49 employees
invoices/ contracts													
… or verbally on request	9%	13%	8%	10%	**23%**	3%	5%	2%	4%	**21%**	**12%**	9%	7%
Verbally on request	22%	31%	**23%**	19%	12%	5%	7%	3%	9%	**40%**	**31%**	21%	24%
On website/ online	2%	2%	1%	1%	7%	0%	6%	3%	1%	5%	2%	1%	2%
Information on allergies requested from customers/ guests	4%	6%	4%	**10%**	1%	0%	3%	0%	1%	8%	6%	4%	4%
Other	2%	3%	2%	1%	2%	2%	3%	2%	1%	5%	2%	2%	2%
Don't know	*%	*%	0%	0%	2%	0%	0%	0%	0%	0%	*%	0%	1%
Do not provide information	7%	0%	8%	4%	0%	18%	4%	16%	6%	5%	4%	8%	3%
Not applicable	24%	-	24%	12%	28%	**61%**	15%	**42%**	**53%**	1%	5%	**27%**	12%
Unweighted bases	644	482	498	100	46	41	91	62	110	116	224	416	231

C3A. Do you provide information on potential allergens that might be contained in any food or drink products that you sell or serve? C3B. How is this allergen information provided? *59*

Statistically higher than average responses are highlighted in bold.

A20: Food hygiene terms that respondents are aware of, by nation, type of packaging and FHRS rating (where directly handle or prepare food product)

	Total	England	Wales	Northern Ireland	Pre-packed (alongside other types)	Packed at premises	Unpackaged	FHRS rating 0-2	FHRS rating 3+
Antimicrobial resistance	52%	51%	45%	**77%**	48%	52%	51%	50%	48%
Antibiotic resistance	79%	77%	88%	91%	79%	75%	**80%**	67%	77%
Superbugs	83%	83%	85%	94%	79%	83%	**85%**	81%	82%
AMR	39%	37%	32%	**68%**	24%	23%	39%	35%	39%
None of these	8%	8%	5%	5%	8%	6%	7%	19%	8%
Unweighted bases	465	353	80	32	141	139	357	23	298

C3C. Have you heard of any of the following terms? *60*

Statistically higher than average responses are highlighted in **bold**.

A21: Ways in which respondents have had contact with the FSA in the last 12 months, by sector, whether serve the public directly and FHRS rating (where aware of the FSA)

	Total	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services	Directly	No direct sales	FHRS rating 0-2	FHRS rating 3+
Visited the website	39%	8%	49%	33%	38%	45%	**47%**	**42%**	24%	29%	**47%**
Called helpline	2%	0%	2%	5%	2%	1%	3%	3%	1%	*%	3%
Via social media	1%	0%	0%	2%	0%	2%	2%	1%	*%	0%	2%
No, but contacted the FSA in another way	1%	0%	1%	4%	1%	3%	1%	1%	1%	0%	2%
No	58%	**89%**	47%	61%	58%	50%	49%	54%	**73%**	71%	49%
Can't recall	1%	3%	2%	0%	2%	0%	1%	1%	2%	0%	1%
Unweighted bases	630	40	91	60	105	116	218	515	115	29	359

C7. In the last 12 months, have you visited the Food Standards Agency's website, called the Food Standards Agency's helpline or been in touch with the Agency via social media?

70 [33]

Statistically higher than average responses are highlighted in bold.

[33] [CTRL + CLICK] on the blue text to return to original reference point

A22: Processes, interventions, advice/training organisations have experienced or been involved in within the last 12 months, by nation, sector, and FHRS rating (where aware of the FSA)

	Total	England	Wales	Northern Ireland	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services	FHRS rating 0-2	FHRS rating 3+
Registration or re-registration as a food business or registration of new premises	7%	7%	9%	3%	0%	11%	6%	7%	**13%**	8%	4%	8%
A food hygiene inspection by your Local Authority/ District Council/ DAERA	52%	51%	**72%**	53%	16%	53%	38%	51%	57%	**63%**	62%	59%
Food safety product recall or withdrawal	2%	2%	8%	0%	0%	2%	0%	8%	0%	2%	3%	3%
Having a food sample taken by your Local Authority/District Council/DAERA	7%	5%	**15%**	**32%**	7%	**19%**	**13%**	7%	8%	5%	6%	6%
Having enforcement action taken against your business	1%	1%	0%	1%	2%	1%	2%	1%	0%	0%	0%	*%
Received advice or training about meeting food safety, standards or food hygiene regulations	25%	25%	26%	22%	12%	**35%**	28%	23%	31%	**28%**	31%	27%
Voluntarily closing down	5%	5%	6%	2%	*%	1%	0%	5%	3%	6%	15%	5%

premises to make improvements following an inspection												
None of the above	37%	38 %	21 %	37 %	**76 %**	34 %	**54 %**	40 %	31 %	25 %	18%	30%
Unweighted bases	644	498	100	46	41	91	62	110	116	224	30	368

D1. Which, if any, of the following has your business experienced or been involved in within the last 12 months? *98*

Statistically higher than average responses are highlighted in bold.

A23: Sources of information about food safety guidelines and regulations, food allergies and product recalls, by nation and sector – prompted, multiple response (all respondents)

	2019	2018	England	Wales	Northern Ireland	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services
The news	51%	55%	51%	**69%**	45%	56%	61%	55%	49%	57%	50%
The Food Standards Agency website	44%	68%	43%	58%	51%	13%	**62%**	41%	41%	51%	**53%**
The Food Standards Agency helpline	18%	25%	18%	24%	20%	8%	18%	18%	16%	18%	**22%**
Your local authority/ Your district council/ DAERA website	57%	65%	56%	**73%**	**74%**	46%	58%	46%	56%	65%	**61%**
Safer food, better business packs	39%	61%	38%	**57%**	35%	5%	28%	15%	39%	**50%**	**50%**
Food Standards Agency leaflets	28%	38%	27%	**41%**	31%	26%	30%	24%	19%	26%	**31%**
Local authority leaflets	32%	-	32%	**49%**	33%	26%	34%	32%	24%	35%	**37%**
Industry magazines	40%	46%	39%	47%	39%	**68%**	**54%**	52%	38%	36%	31%
Generic web search e.g. Google	58%	73%	58%	**70%**	50%	65%	**72%**	58%	49%	69%	57%
Environmental Health website	43%	63%	42%	**56%**	42%	35%	**55%**	42%	36%	55%	46%
Trading Standards website	36%	52%	36%	**47%**	35%	29%	**54%**	36%	32%	38%	38%
Colleagues/ associates	43%	54%	43%	**55%**	39%	55%	52%	**59%**	32%	43%	41%

	2019	2018	England	Wales	Northern Ireland	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services
Business networks e.g. Federation of Small Businesses	26%	37%	25%	**36%**	30%	31%	**41%**	36%	30%	29%	21%
National Farmers Union (NFU)/ Ulster Farmers Union (UFU)	16%	13%	17%	17%	10%	**69%**	12%	15%	6%	6%	6%
Gov.uk	33%	-	33%	40%	35%	46%	47%	38%	24%	35%	31%
Trade bodies/associations	21%	-	21%	**30%**	30%	**38%**	**41%**	**32%**	16%	17%	17%
Other	10%	14%	10%	7%	2%	10%	12%	17%	14%	6%	8%
No, none, nothing	4%	1%	3%	2%	8%	7%	3%	3%	3%	3%	3%
Unweighted bases	644	530	498	100	46	41	91	62	110	116	224

E1. Which of the following do you use to find out about food safety guidelines and regulations, food allergies and product recalls? Do you use...? *114*

Statistically higher than average responses are highlighted in bold.

A24: Import activity, by nation and sector – prompted, multiple response (all respondents)

	2019	2018	England	Wales	Northern Ireland	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services
Imports directly	10%	15%	8%	12%	**38%**	7%	**32%**	**49%**	8%	6%	7%
Imports from EU/ Republic of Ireland	8%	13%	7%	10%	**32%**	5%	**30%**	**43%**	7%	5%	6%
Imports from EU but not Republic of Ireland	6%	10%	6%	10%	13%	2%	**26%**	**30%**	7%	3%	5%
Imports from outside the EU	3%	5%	3%	0%	6%	2%	**11%**	**14%**	2%	2%	3%
Imports from outside the EU only	2%	1%	1%	0%	**6%**	2%	1%	**6%**	1%	1%	1%
Imports from EU and outside the EU	2%	1%	2%	0%	0%	0%	**10%**	**8%**	1%	1%	1%
Unweighted bases	644	530	498	100	46	41	91	62	110	116	224

F1. ...are these overseas suppliers, producers or wholesalers based...? *124* [34]

Statistically higher than average responses are highlighted in **bold**.

[34] [CTRL + CLICK] on the blue text to return to original reference point

A25: Computer systems and software FBOs use, by organisation size, number of sites and use of internet facilities – prompted, multiple response (all respondents)

	2019	2018	<10 employees	10-24 employees	25-49 employees	Single site	Multi-site	Has a website	Has social media account	Any online sales
Have computer systems/software to manage the finances of the business	64%	60%	60%	**76%**	**89%**	63%	**95%**	75%	76%	68%
Have computer systems/software to manage operational aspects of the business (e.g. stock levels, ordering, supply chain)	42%	46%	39%	**46%**	**73%**	40%	**69%**	49%	43%	42%
Have computer systems/software to manage the business staffing	38%	38%	33%	**51%**	**70%**	37%	**58%**	51%	45%	45%
Any	71%	69%	67%	**84%**	**97%**	70%	**97%**	83%	76%	75%
Unweighted bases	644	530	413	160	71	609	34	426	453	478

G1. Does your business...? *129*

Statistically higher than average responses are highlighted in **bold**.

A26: Computer systems and software businesses use, by sector – prompted, multiple response (all respondents)

	Total	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services
Have computer systems/software to manage the finances of the business	64%	60%	**86%**	**91%**	62%	**75%**	61%
Have computer systems software to manage operational aspects of the business (e.g. stock levels, ordering, supply chain)	42%	46%	**61%**	**57%**	**51%**	34%	36%
Have computer systems/software to manage the business staffing	38%	27%	45%	**51%**	40%	41%	38%
Any	71%	70%	**89%**	**91%**	77%	**82%**	66%
Unweighted bases	644	41	91	62	110	116	224

G1. Does your business...? *129*

Statistically higher than average responses are highlighted in **bold**.

Annex 2: Background

In August 2018 the Food Standards Agency (FSA) commissioned BMG Research to undertake a survey of food business operators (FBOs) with up to 49 employees across all their sites in England, Wales and Northern Ireland. The survey was conceived as an annual tracking survey with the following aims:

- To better inform insights on the UK's EU exit and engagement with small and micro food businesses
- To 'unpack' attitudes towards regulation to deepen insights and knowledge of small and micro food businesses with regards to the FSA's Regulating our Future priority
- To measure trust in the FSA and extent to which FSA is considered an excellent, accountable and modern regulator
- To explore any other issues as required.

The 2018 tracking survey was conducted in September and October 2018, and comprised 530 interviews with small (10-49 employees) and micro (up to 10 employees) FBOs including 56 interviews with newly established FBOs (less than a year old) and FBOs with a FHRS (Food Hygiene Rating Scheme) rating below 3. In 2018, FBOs in Wales and Northern Ireland were over-sampled to ensure there was a robust sample for analysis in these nations.

The 2019 tracking survey follows a similar specification, although this year the samples within Wales and Northern Ireland have been doubled in order to further increase the scope for analysis in these nations.

The data in both 2018 and 2019 was weighted to be representative of the micro and small FBO population across England, Wales and Northern Ireland.

This survey, while duplicating the methodology and approach and expanding geographic coverage of the 2018 survey, also increases the focus on issues related to food safety and how FBOs are addressing the need to minimise customer exposure to harmful allergens and microbes.

Survey sample

The in-scope population for the survey consisted of FBOs with up to 49 employees across all their sites. FBOs sampled represented a range of food-related sectors which included agriculture, fishing, manufacturer of food and beverage products, wholesale and retail of food and beverage products, accommodation and food service activities. A detailed breakdown of sectors and sub-sectors included for sampling is included in Appendix II.

Methodology

In total 644 interviews were undertaken by telephone with FBOs in the defined population, including 51 interviews with newly established FBOs, those with an FHRS rating of below 3 and with establishments headed up by someone for whom English is a second language.

The sample was structured to obtain robust sample sizes within key sub-samples, including by organisation size and nation. Quotas of 100 were set for interviews within each of Wales and Northern Ireland, as, based on the relative size of the in-scope business populations in Northern Ireland and Wales, the proportional samples would otherwise have been considerably smaller (29 and 19 interviews respectively). However, only 46 interviews were achieved in Northern Ireland due to the limited number of contacts available. Larger FBOs were over-sampled to ensure that a full range of views by sector were represented within this size group. Over-sampling against the business population distribution results in larger sub-sample sizes that ensure greater confidence when discussing the views of these sub-samples.

Franchises were excluded from the sample.

Interviews were conducted in September, October and November 2019 and average interview length was around 23 minutes.

The sample frames used for the survey included the FHRS database, provided to BMG by FSA, and the commercial database supplier, Experian. The Experian and FHRS databases were also matched in order to obtain telephone numbers for contacts available on the FHRS database and to supplement FHRS database contacts.

The data was weighted to latest available ONS IDBR statistics[35] (March 2018) so that the statistics reported are representative of the actual business population structure by size, sector and nation.

The sample breakdown in terms of the actual number of interviews achieved and the number of cases after weighting is summarised in Appendix I.

Generally, results from the total sample may be presumed accurate (with a 95% confidence level) within a maximum sample error of +/-3.9%. The margin of error on sub-sets of the total sample is larger, depending on the unweighted number of respondents.

Throughout this report, significant differences between sub-samples and the total sample minus the sub-sample tested are highlighted in the text and for the most part only

[35] ONS IDBR – Office for National Statistics; Inter-Departmental Business Register

statistically significant differences are discussed. Significantly higher than average statistics i.e. a statistic based on a sub-sample that is higher than the statistic based on the total, are presented in bold and enlarged font in figures and tables. A more detailed explanation of sample error is included in Appendix IV.

Results have been presented rounded to no decimal places – this may mean that some totals exceed 100%.

Annex 3: Sample breakdown

Sample breakdown

	Achieved interviews no.	Unweighted sample %	Weighted no.	Weighted sample %
Primary food producers	41	6%	101	16%
Manufacturing	91	14%	18	3%
Wholesale	62	10%	29	4%
Retail	110	17%	112	17%
Accommodation	116	18%	27	4%
Food and beverage service activities	224	35%	357	55%
<10 employees	413	64%	507	64%
10-24 employees	160	25%	111	17%
25-49 employees	71	11%	26	4%
England	498	77%	585	91%
Wales	100	16%	23	4%
Northern Ireland	46	7%	36	6%
FHRS rating: Retail, accommodation and food and beverage service activities, and Manufacturing and Wholesale in Wales (not taken into account in the weighting process)				
0-2	30	5%	42	6%
3	368	57%	40	6%
4	78	12%	106	16%
5	258	40%	281	44%
Awaiting inspection/no rating (all businesses)	246	38%	174	27%
Total	644	100%	644	100%

Annex 4: Standard Industrial Classifications

Standard Industrial Classifications (SIC 2007) that are in-scope for the survey

Primary

01	Crop and animal production, hunting and related service activities		
01.1	Growing of non-perennial crops		
		01.11	Growing of cereals (except rice), leguminous crops and oil seeds
		01.12	Growing of rice
		01.13	Growing of vegetables and melons, roots and tubers
		01.14	Growing of sugar cane
		01.15	Growing of tobacco
		01.16	Growing of fibre crops
		01.19	Growing of other non-perennial crops
01.2	Growing of perennial crops		
		01.21	Growing of grapes
		01.22	Growing of tropical and subtropical fruits
		01.23	Growing of citrus fruits
		01.24	Growing of pome fruits and stone fruits
		01.25	Growing of other tree and bush fruits and nuts
		01.26	Growing of oleaginous fruits
		01.27	Growing of beverage crops
		01.28	Growing of spices, aromatic, drug and pharmaceutical crops
		01.29	Growing of other perennial crops
01.3	Plant propagation		
		01.30	Plant propagation
01.4	Animal production		
		01.41	Raising of dairy cattle

		01.42	Raising of other cattle and buffaloes
		01.43	Raising of horses and other equines
		01.44	Raising of camels and camelids
		01.45	Raising of sheep and goats
		01.46	Raising of swine/pigs
		01.47	Raising of poultry
		01.49	Raising of other animals
	01.5	Mixed farming	
		01.50	Mixed farming
	01.6	Support activities to agriculture and post-harvest crop activities	
		01.61	Support activities for crop production
		01.62	Support activities for animal production
		01.62/1	Farm animal boarding and care
		01.62/9	Support activities for animal production (other than farm animal boarding and care) n.e.c.
		01.63	Post-harvest crop activities
		01.64	Seed processing for propagation
	01.7	Hunting, trapping and related service activities	
		01.70	Hunting, trapping and related service activities

03	Fishing and aquaculture		
	03.1	Fishing	
		03.11	Marine fishing
		03.12	Freshwater fishing
	03.2	Aquaculture	
		03.21	Marine aquaculture
		03.22	Freshwater aquaculture

Manufacturing

10 Manufacture of food products

10.1	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
10.2	Processing and preserving of fish, crustaceans and molluscs		
		10.20	Processing and preserving of fish, crustaceans and molluscs
10.3	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
10.4	Manufacture of vegetable and animal oils and fats		
		10.41	Manufacture of oils and fats
		10.42	Manufacture of margarine and similar edible fats
10.5	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) n.e.c.
		10.52	Manufacture of ice cream
10.6	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
10.7	Manufacture of bakery and farinaceous products		

		10.71	Manufacture of bread; manufacture of fresh pastry goods and cakes
		10.72	Manufacture of rusks and biscuits; manufacture of preserved pastry goods and cakes
		10.73	Manufacture of macaroni, noodles, couscous and similar farinaceous products
	10.8	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 confectionery
		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.
	10.9	Manufacture of prepared animal feeds	
		10.91	Manufacture of prepared feeds for farm animals
		10.92	Manufacture of prepared pet foods
11	Manufacture of beverages		
	11.0	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

Wholesale

46	Wholesale trade, except of motor vehicles and motorcycles		
	46.1	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
	46.2	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
	46.3	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

Retail

47	Retail trade, except of motor vehicles and motorcycles		
	47.1	Retail sale in non-specialised stores	
		47.11	Retail sale in non-specialised stores with food, beverages or tobacco predominating
	47.2	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
		47.76	Retail sale of flowers, plants, seeds, fertilisers, pet animals and pet food in specialised stores
	47.8	Retail sale via stalls and markets	
		47.81	Retail sale via stalls and markets of food, beverages and tobacco products

Accommodation

55	Accommodation		
	55.1	Hotels and similar accommodation	
		55.10	Hotels and similar accommodation
	55.2	Holiday and other short-stay 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) n.e.c.
	55.3	Camping grounds, recreational vehicle parks and trailer parks	
		55.30	Camping grounds, recreational vehicle parks and trailer parks
	55.9	Other accommodation	
		55.90	Other accommodation

Food and beverage services

56	Food and beverage service activities		
	56.1	Restaurants and mobile food 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
	56.2	Event catering and other food service activities	
		56.21	Event catering activities
		56.29	Other food service activities
	56.3	Beverage serving activities	
		56.30	Beverage serving activities
		56.30/1	Licensed clubs
		56.30/2	Public houses and bars

Annex 5: Sample error explained

In an ideal world when views are sought, everyone would be asked. This would involve a census. It is an expensive approach and time-consuming and impractical, as it is very difficult to get hold of everyone in a target population. Consulting a sample of a target population is more cost-effective and achievable. A sampling approach, however, does involve compromise with regard to the extent to which the views sought accurately reflect those of everyone in the target population. The degree to which the statistics gathered from a sample of the target population deviate from those that would be gathered from a census is known as the standard error.

Standard error is calculated on the basis of two different elements; the sample size and the statistic itself. The larger the sample, the smaller the size of the standard error. This is calculated to a confidence level, most commonly at 95%. For example, based on the customers overall sample size of 530, a reported statistic of 50% would be subject to a standard sampling error of +/-4.3%. Thus, if all customers were asked, we would be 95% confident that the reported statistic would fall within a range of 45.7% to 54.3%.

The size of the sampling error is at its maximum for a reported statistic of 50%. Reported statistics closer to 0% or 100% would have a smaller sampling error.

Formula for standard error at 95% level of confidence

The formula for calculating the standard error associated with a percentage based on a given sample is as follows:

- confidence interval = $1.96 * \sqrt{(x * (1 - x)/y)}$
- where x = percentage and y = sample base.

Thus, standard error varies with sample size and the statistic reported. It will be higher when looking at sub-groups within a sample and, as such, caution has to be exercised when drawing conclusions where sample sub-groups are particularly small.

The following table provides standard error ranges for a number of sample sizes and for a range of statistics.

Based on a statistic of…	10%	25%	50%	65%	80%
sample base	100	100	100	100	100
standard error	5.88%	8.49%	9.80%	9.35%	7.84%
sample base	200	200	200	200	200
standard error	4.16%	6.00%	6.93%	6.61%	5.54%
sample base	300	300	300	300	300
standard error	3.39%	4.90%	5.66%	5.40%	4.53%
sample base	400	400	400	400	400
standard error	2.94%	4.24%	4.90%	4.67%	3.92%
sample base	500	500	500	500	500
standard error	2.63%	3.80%	4.38%	4.18%	3.51%

When results are compared between different sub-groups within a sample, differences may be observed. These differences may be genuine, or they may occur by chance, because not everyone in the population has been surveyed. To test whether the difference is genuine, that is, if it is statistically significant, we again use the sample size, the percentage giving a particular response, and the chosen degree of confidence. If we assume a confidence level of 95%, the difference between the results of two different sub-groups must be greater than the values given below to be a "genuine" difference.

Sample size of sub-groups to be compared	Size of difference required for significance at or near these percentage levels		
	10% or 90% +/-	30% or 70% +/-	50% +/-
100 and 100	7	13	14
100 and 200	7	11	12
100 and 250	7	11	12
200 and 200	7	10	11
250 and 400	5	7	8
100 and 400	6	9	10
200 and 400	5	8	9
500 and 500	4	6	6

Reference: FSA-0XXX-2020

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