Research Report

FSA Small and Micro FBO Tracking Survey W1 Report

Prepared for: The Food Standards Agency

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Prepared for: The Food Standards Agency

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1 Executive Summary

In August 2018 the Food Standards Agency (FSA) commissioned BMG Research to undertake a survey of food organisations (FBO) with up to 49 employees across all their sites in England, Wales and Northern Ireland.

The aims of the survey were to:

- Better inform insights on the UK's EU exit and engagement with small and micro food businesses
- '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
- Measure trust in the FSA and extent to which FSA is considered an excellent, accountable and modern regulator
- Explore any other issues as required.

In total, 530 interviews were conducted in September and October 2018, including 56 interviews with newly established businesses (less than a year old) and businesses with a FHRS (Food Hygiene Rating Scheme) rating below 3. Businesses in Wales and Northern Ireland were over-sampled to ensure there was a robust sample for analysis in these nations.

The data was weighted to be representative of the micro (up to 10 employees) and small (10-49 employees) food business population across England, Wales and Northern Ireland.

This survey represents the first wave of a tracking survey and it is anticipated that the methodology, approach and coverage will be further developed and refined for future waves.

1.1 Key points and conclusions

1.1.1 UK's exit from the EU

At the time of the survey there was still a great deal of uncertainty as to the shape that the UK's exit from the EU would take.

It is not one of the top concerns, threats or barriers to success perceived by businesses taking part in the survey. It ranks below taxation, market competition, recruitment and skills, regulations/red tape and the National Living Wage in the list of potential concerns/threats or barriers. It comes to the fore however, for exporters and importers. Bearing in mind the low level of importing and exporting generally across all food businesses and the fact that the industry is dominated by businesses who mainly serve 'walk-in', on-site customers, it is easy to see why many businesses would hold the view that the UK's exit from the EU is of little direct relevance to them.

Food businesses are more likely to anticipate a negative impact on their business as a result of the UK exiting the EU than a positive one. Businesses most likely to anticipate a negative impact include wholesalers, importers and businesses in Northern Ireland. Negative impacts mentioned tend to revolve around increasing costs and the

exacerbation of skill shortages. Businesses most likely to anticipate a positive impact include manufacturers and exporters. Those expecting a positive impact tend to feel it may push purchasing and spending back towards UK businesses and eventually reduce red tape.

Fewer than one in ten businesses (8%) is making preparations for the UK exit from the EU. These businesses tend to be those currently trading with the EU and most likely to be importers, exporters and distributors.

While more than a quarter of food businesses hope for less regulation following the UK's exit from the EU, the predominant aspiration is that the level of regulation will not change. There is an under-lying view that regulations are beneficial and keep people safe. Most businesses do see the point of them.

1.1.2 Views on regulations

Leading on from views expressed about the impact of the UK's exit from the EU on the level of regulation, there are positive views of regulations within the food industry and regulations are believed to be beneficial and necessary for consumer safety and maintaining good standards across the industry, particularly by businesses selling direct to the public, i.e. mainly within the food/beverage services sector. However, processes and paperwork garner less positive opinions and are not altogether considered fair or reasonable, particularly by those businesses that have an FHRS rating of below 3. Significant minorities of respondents are not certain that all food businesses do what is required to make food safe and appropriately labelled. Uncertainty in this regard is particularly evident among food businesses in England.

Micro and small food businesses are heavily reliant on their local council/authority for information and support. They rate these organisations highly in their dealings with them.

1.1.3 Trust in the FSA

Few businesses have had contact with the FSA and the FSA scores are lower than those of the local council/authority with regard to trustworthiness, approachability and communications or dealings. This is likely to reflect the nature of contact as well as the frequency and, therefore, level of familiarity with these organisations. Businesses that serve the public directly (mainly food and beverage services businesses) and who have been in contact with the FSA recently tend to hold more positive views of the FSA. It suggests that more positive assessment of the FSA comes with experience of the organisation, while those not having been in contact with the FSA have a more negative and perhaps unjustified perception of the service provided.

Overall more than half of all businesses that are aware of the FSA agree with a range of positive statements about the FSA, with a fifth strongly agreeing with all. This is an encouraging basis on which to launch strategies to improve trust in the FSA.

The FSA perform particularly well with regard to perceptions that they use information appropriately and is largely seen as working hard to improve the food industry for everyone. In terms of weak areas, fewest respondents agree that the FSA is good at identifying where poor standards exist and that it is highly effective at regulating the food industry. This suggests that there should be a greater focus on action towards enforcing regulations in the future. That said, businesses with a low FHRS rating (0-2) are more

likely than those with a better rating to consider the FSA as highly effective and doing a good job. This may reflect the fact that the FSA may be involved in addressing shortcomings amongst these businesses.

1.1.4 Processes and interventions

Although based on a very small number of businesses who were able to report on actual experience (less than 1% of all respondents), responding to enforcement action is considered very difficult. There is also a sizeable minority of businesses (two-fifths) that do not have written procedures in place to guide them on how to deal with product recall or withdrawal.

The FSA news and alerts service is rated highly in terms of its usefulness by those that have subscribed to it. However, at just one in eight of all businesses, subscribers are in the minority and there is scope to increase penetration of what is perceived by those that use it as a very useful service.

Just one in six businesses are aware of the National Food Crime Unit and points to a need to more actively promote this service.

At present around one in five businesses in the food industry do not have a business email address and/or social media account. There is an ongoing need to maintain 'traditional' modes of contact i.e. telephone, letter, leaflet, face to face, with a significant number of industry players.

1.2 Key findings

1.2.1 Business concerns

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

- Taxation, VAT, PAYE, National Insurance and business rates (61% of all respondents);
- Competition in the market (53%);
- Staff recruitment and skills (47%);
- Regulations and red tape (46%);
- National Living Wage (46%);
- The UK's exit from the EU (38%);
- Lack of adequate broadband (32%);
- Workplace pensions (28%);
- The availability and/or cost of suitable premises (27%);
- Late payment (25%);
- Obtaining finance (23%).

1.2.2 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; 36%, compared with 17%.

Significant minorities of respondents do not expect the UK's exit from the EU to impact on their business at all (22%) 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 product/service prices: 25%;
- A potential reduction in spending among tourists and general customers: 22%;
- Staffing/recruitment/skills difficulties: 14%;
- Import/export tariffs/taxes: 14%;
- Increased cost of living/general costs: 13%;
- Exchange rates will increase/value of the pound will be reduced: 10%;
- General uncertainty affecting the business: 10%.

While some positive views included that there would be (of those expecting a positive impact):

- Increased sourcing of home grown/local/British produce: 19%;
- Less restrictive regulations/red tape: 14%;
- More people spending including UK tourists: 14%;
- An improvement in things generally; better/free trading; and cheaper prices: 6-7%.

1.2.3 Preparing for the UK's EU exit

Just 8% of 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 (28%); importers from EU/Republic of Ireland (26%); and exporters (35%).

Among those who are making preparations, activities included:

- Increasing product prices: 17%;
- Securing staff i.e. taking measure to ensure existing/potential staff has the right working visas: 13%;
- General contingency plans: 11%;
- Securing suppliers – taking to existing/potential suppliers to ensure they can provide products/services: 10%;
- Sourcing more products locally/within the UK: 8%;
- Closing or selling their business: 5%;
- Bulk buying/stockpiling: 3%;
- Becoming self-sufficient: 3%;
- Other activities to prepare for the UK's exit from the EU include diversification; putting project/product launches on hold; downsizing; and currency-hedging.

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

The majority of respondents (59%) hope that regulations around food in the UK will not change as a result of the UK voting to leave the European Union. Of the remainder, a higher proportion hopes for less regulation rather than more (28%, compared with 5%).

A third of these respondents hoping for less regulation feel the industry is over-regulated at present (34%); while half this proportion (16%) hope that less regulation will help to simplify things and be less restrictive and fewer mention how time-consuming regulations are (13%); that they hope less regulation will result in lower costs and cheaper products (11%); and/or more independence from the EU (11%), while some consider some regulations unnecessary (10%).

One in five (19%) of those hoping for more regulation feel that it would be beneficial for everyone to abide by the same rules, while some feel some feel regulations should switch to those set by the UK, and that current good standards should be upheld. There is an underlying view here that regulations are beneficial and keep people safe.

1.2.5 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: 62%;
- Information on food safety and hygiene is easy to find and access: 62%;
- Regulations are reasonable for food businesses: 59%;
- Regulations are easy and practical to keep to: 54%;
- The processes in place to ensure food businesses keep to the regulations help to ensure the worst performing food businesses will improve: 50%;
- Regulations add value to businesses: 48%;
- The processes in place to ensure food businesses keep to the regulations are conducted fairly: 42%;
- The paperwork involved in keeping to the regulations is reasonable: 38%.

Factors impacting on the propensity to agree or disagree with these statements include whether or not a business is consumer-facing (i.e. directly serving the public) or not. Those serving the public directly are more likely to agree, with manufacturers and primary food producers generally more likely to disagree. Businesses with low FHRS ratings are less likely to agree with these statements on regulations than those with an FHRS rating of 3 and above.

1.2.6 Confidence in the food industry and its adherence to regulations

When respondents were asked to indicate how certain or uncertain they are that all food businesses in the country are doing what they should to comply with a number of specified food safety requirements, they expressed the following views - the proportions that feel quite or very certain that all food businesses..:

- Make sure food is safe to eat: 72%;
- Display their food hygiene scheme rating (if they sell food directly to the public): 65%;
- Food is correctly labelled/what it says it is: 62%;
- Withdraw/recall unsafe food and complete an incident report: 60%;
- Provide clear information on allergens: 60%;
- Keep records on where they got food from and how this information on demand – known as ‘traceability’: 56%;

- Make sure they don't mislead people by the way food is labelled, advertised or marketed: 54%.

Wholesalers and manufacturers are least likely to be certain of the widespread take up of activities regarding food safety and labelling, while food/beverage services businesses are the most confident with regard to adherence to the reliability of food labelling.

Specialist retailers and exporters are particularly confident that all food businesses can fulfil demand for traceability of food products they use.

1.2.7 External sources of information, advice and support

It is clear that micro and small food businesses are heavily reliant on their local council/authority for information and support in meeting food safety and hygiene regulations: 81% cite this as source.

Just 9% spontaneously cite the Food Standards Agency in this context, with fewer mentioning other organisations; Farm Assurance/Red Tractor/independent consultant (5%); DEFRA[1] (England and Wales) (2%); DAERA[2] (Northern Ireland) (9% - less than 1% of all) and the Straits Area Local Food Alliance (1%).

1.2.7.1 Local authority/district council/DAERA

Half the respondents (49%) 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 (84%).

The 44% of respondents whose businesses have had contact with their local authority/council/DAERA (and more than just a visit to the website) rated the organisation they had had contact with based on their experience and the proportions giving a rating of 8 or above on a range of aspects were as follows:

- Trustworthiness: 79%;
- Ease of dealing with the organisation: 78%;
- How approachable the organisation was: 79%;
- Clarity of communications from the organisations: 76%.

Eighty-seven per cent of respondents considered the contact they had with their local authority/council/DAERA easy. Just 7% had found it difficult.

1.2.7.2 FSA

The vast majority of all respondents (94%) had heard of the FSA before taking part in the survey. However, just 9% of these reported having had any contact with the FSA in the last 12 months.

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

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

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

This is most likely to have been face to face contact (84%).

Eighty-four per cent of those aware of the FSA feel they have at least a fairly good understanding of the FSA's role, including 35% feel they have a very good understanding of its role.

The 7% of respondents whose businesses have had contact with the FSA (and 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: 52%;
- Ease of dealing with the FSA: 60%;
- How approachable the FSA is: 61%;
- Clarity of communications from the FSA: 51%.

Eighty-one per cent of the 9% 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. Just 15% had found it difficult.

Respondents aware of the FSA prior to being called to participate in the survey (94% 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: 58%;
- I trust the FSA to do a good job: 51%;
- The FSA is working hard to improve the food industry for all of us: 52%;
- The FSA is good at identifying where poor standards exist: 43%;
- The FSA is highly effective at regulating the food industry: 40%;
- The FSA would be a good organisation to work with: 46%;
- The FSA's work is very high profile: 35%.

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

Taking these statements all together[4] (with the exception of 'the FSA's work is very high profile) and aggregating responses to obtain an indicator of 'overall trust'[5] and 'high trust'[6], 56% of all respondents aware of the FSA could be said to trust the FSA overall, while 20% could be said to have a high level of trust.

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 18%).

[4] Reflecting the fact that this survey is the first wave of an on-going tracking survey, this is the first attempt at creating a composite score and that further iterations may be needed, as well as further research into the area, to explore trust in the FSA among businesses.

[5] Based on agreeing with all statements

[6] Based on strongly agreeing with all statements

1.2.8 Processes and interventions experienced

While more than three-fifths of all respondents report their business has had a food hygiene inspection in the last 12 months (63%), fewer than one in ten reports any other process or intervention being experienced by their business:

- 8% have had a food sample taken;
- 4% have registered as a food business (42% of the 4% of businesses that have been established less than a year);
- 3% have experienced a food safety product recall or withdrawal;
- 1% have voluntarily closed down following the need for improvements having been identified;
- Less than 1% have had enforcement action taken against them.

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

In all but having enforcement action taken against them, the vast majority of respondents had found it easy to complete the process. Nearly all those having enforcement action taken against them had found it difficult (91%).

Of the 3% of respondents that have experienced a food product recall or withdrawal in the last 12 months more than half (57%) returned the product to the supplier, while two-fifths (41%) took the product off the shelf/withdrew the product from sale and in a minority of cases (9%) the product was disposed of.

Three in five respondents (60%) report that their business has written procedures in place to guide them on how to deal with product recall or withdrawal, increasing to 74% multi-site businesses, 80% in the wholesale sector and 75% in businesses that do not sell direct to the public. Businesses with a low FHRS rating (0-2) are significantly less likely than average to have written procedures in place to help them deal with product recall or withdrawal (40%).

1.2.9 Sources of information

Google or similar (i.e. a web search) is the most frequently used source of information about food safety guidelines and regulations, food allergies and product recalls (73%), followed by the Food Standards Agency website (68%) and their local authority/district council/DAERA[7] (65%).

Food/beverage services businesses tend to use a wider range of sources than other sectors, particularly the FSA website (75%); the Environmental Health website (73%); and Safer Food, Better Business packs (72%).

Respondents are most likely to opt to be told about changes to regulations via email alerts (65% of all respondents), followed by leaflets/letters through the post (38%).

When asked who they would like to receive updates from, respondents that were interested in receiving updates were divided between their local authority/council/ environmental health officer and the FSA (53% and 50% respectively).

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

1.2.10 FSA news and alerts service

When asked if they have subscribed to the FSA news and alerts service to receive food and allergy alerts by email or text message, 13% of the 94% of respondents that are aware of the FSA have subscribed and another 13% of those aware of the FSA have heard of the service but not subscribed to it.

Subscribers are more strongly represented in the wholesale (22%) and primary food production (18%) sectors, and amongst importers/exporters/distributors (24%) as well as within businesses that are FHRS rated at 5 (21%).

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 79% of food/beverage services businesses.

1.2.11 National Food Crime Unit

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

Just over half of those aware of the National Food Crime Unit (52%) are aware that food crime can be reported anonymously to the National Food Crime Unit.

1.2.12 Use of IT systems and facilities

Most respondents report that their business has one or more of a range of specified IT systems and facilities (92% do so).

Focusing on internet-based facilities, the most common facility that businesses set up is a business email address (79%), while slightly fewer have social media accounts i.e. Twitter/Facebook etc (72%), although this increases to 91% among businesses established for less than a year. Fewer have a website for their business (64%) and it is likely that a social media presence is in lieu of a website for some.

Around one in four businesses sell directly from a website (22%), increasing to around half of accommodation[8] (53%) and primary food producers (47%).

One in four businesses sells off the internet via a third party website (24%) i.e. Amazon or Ebay etc. This proportion is higher than average amongst businesses in the accommodation sector (68%) and exporters (57%).

Nearly half (46%) have computer systems software to manage operational aspects of the business such as stock levels, ordering and supply chain. Fewer (38%) have computer systems/software to manage the business' staffing, while having computer systems/software to manage the business' finances is more common (60%).

Business size is the main factor in the use of computer systems/software, with larger businesses more likely than those with a smaller workforce and scale of operations to adopt them, while business activity is a more significant factor in the use of the internet, particularly in respect of promoting and selling products or services online.

[8] See appendix II for a detailed breakdown of industry sectors

2 Background

In August 2018, the Food Standards Agency (FSA) commissioned BMG Research to undertake a survey of food organisations (FBO) in England, Wales and Northern Ireland.

The aims of the survey were to:

- Better inform insights on the UK's EU exit and engagement with small and micro food businesses
- '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
- Measure trust in the FSA and extent to which FSA is considered an excellent, accountable and modern regulator
- Explore any other issues as required.

This survey represents the first wave of a tracking survey and it is anticipated that the methodology, approach and coverage will be further developed and refined for future waves.

2.1 Survey sample

The in-scope population for the survey consisted of businesses with up to 49 employees across all their sites. Businesses 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.

2.2 Methodology

We set out to undertake 475 interviews by telephone with businesses in the defined population with a further 50 interviews to be conducted face to face. The face to face interviews were targeting newly established (less than a year old) businesses and businesses with an FHRS (Food Hygiene Rating Scheme) rating below 3. It should be noted that the FHRS rating only applies to businesses in England and Northern Ireland within the retail, accommodation and food services sectors and in Wales it applies to businesses in these sectors, but also in manufacturing and wholesale sectors.

The sample was structured to obtain robust sample sizes within key sub-samples, including by business size and nation. Quotas of 50 were set for interviews within each of Northern Ireland and Wales, 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 (19 and 29 interviews respectively). Similarly larger businesses 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.

In total 530 interviews were conducted, including 56 interviews with businesses that were newly established and/or those with an FHRS rating of below 3.

Interviews were conducted in September and October 2018 and average interview length was around 22 minutes.

The sample frames used for the survey included the FHRS database, provided to BMG by FSA, and the commercial database supplier. Dun and Bradstreet. The Dun and Bradstreet database and FHRS database 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[9] (March 2017) 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 +/-4.3%. 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 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%.

2.3 A summary of the business profile

Based on weighted data, which reflects the in-scope population, the profile of micro and small food businesses is as follows:

- 93% of food businesses sell directly to the public;
- More than half of food businesses are food and beverage services businesses (55%). Retailers account for 17% of all food businesses; primary food producers for 16%; 4% are within accommodation services; 4% are wholesalers and 3% are manufacturers[10].

- 97% of businesses operate from one site only;
- 79% employ fewer than 10 employees across all sites, this includes the 42% of all surveyed that employ fewer than 5 employees;
- 17% employ between 10 and 24 employees, and 4% between 25 and 49 employees.

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

[10] See Appendix II for a detailed breakdown of industry classifications

- 55% have been trading for at least 10 years; 32% for more than 20 years;
- 28% have been trading for up to 5 years; 4% established in the last year.

- 15% directly import any goods or services from a supplier, producer or wholesaler situated outside the UK (23% in Northern Ireland; 60% of wholesalers);
- 90% of importers (13% of all businesses) source goods or services from the EU;
- 3% export (12% of primary food producers; 15% of wholesalers);
- 69% of exporters do so directly; 43% use an agent/distributor;
- 93% of exporters (3% of all businesses) export to the EU. Within Northern Ireland businesses, exports to the Republic of Ireland are estimated to account for an average of 23% of business turnover.

3 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 organisations. The anticipated impact of the UK's exit from the EU and what, if anything, businesses are doing to prepare for it is discussed.

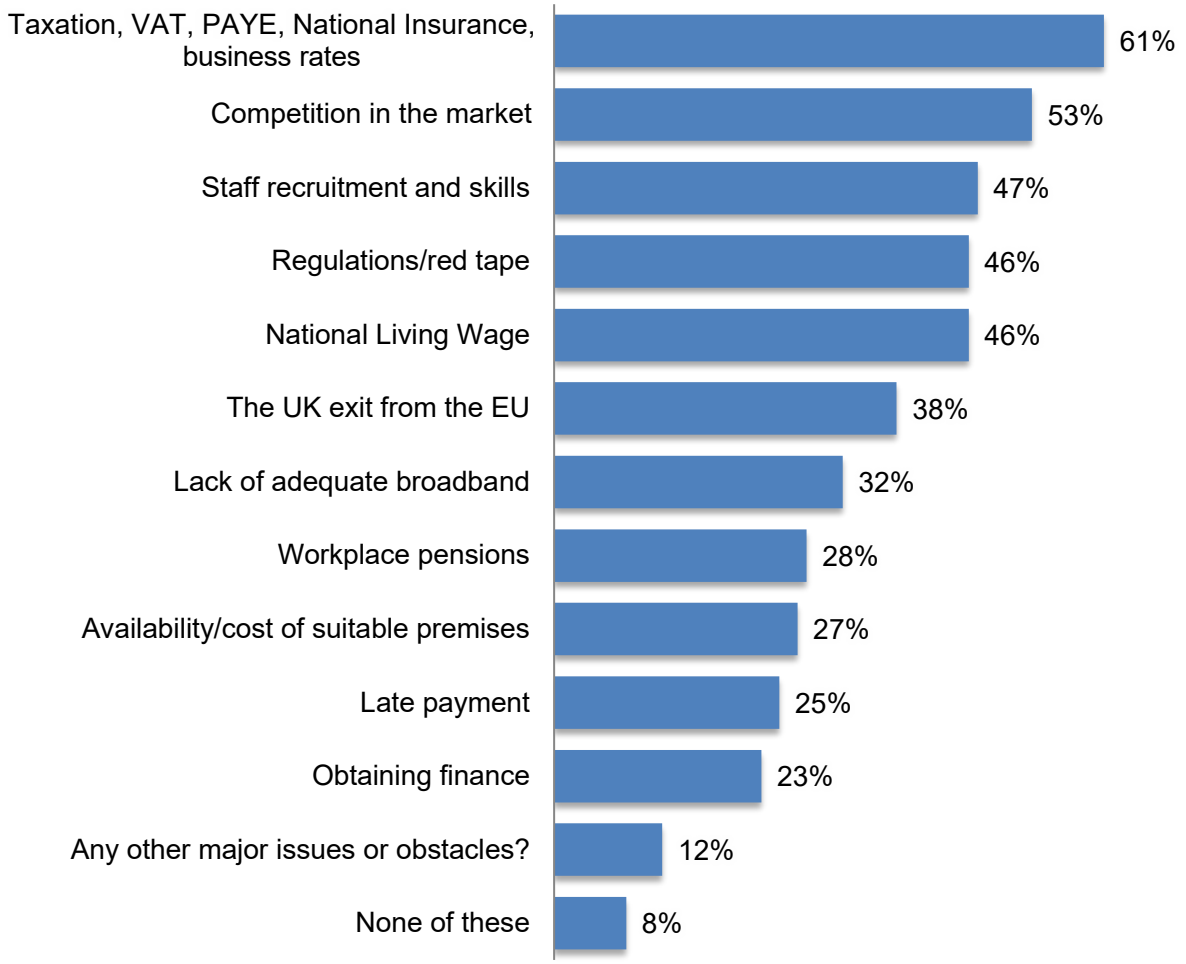
Business concerns and anticipated impact of the UK's exit from the EU - key findings
Taxation, VAT, PAYE, National Insurance and business rates are considered concerns, threats or barriers to the success of the business by three-fifths of respondents (61%).
Other significant concerns, threats or barriers include: competition in the market (53%), staff recruitment and skills (47%), regulations and red tape (46%) and the National Living Wage (46%).
The UK's exit from the EU is a concern for around two-fifths of respondents (38%), particularly manufacturers (54%), wholesalers (63%), exporters (81%) and importers (62%).
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 (36%, compared with 17%).
Around two in five respondents either do not think there will be any impact on their business from the UK's exit from the EU (22%) or do not know what the impact might be (18%).
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, possible labour and skill shortages, and general uncertainty.
Positive views with regard to the potential impact of the UK's exit from the EU revolve around possible increase in demand for UK produce, potentially more UK tourists and the possibility of less restrictive regulations/red tape.
Those preparing for the UK's exit from the EU are in the minority (8%) and tend to be those businesses that currently trade with the EU (including the Republic of Ireland).
Respondents are significantly more likely to hope for less regulation than more as a result of the UK's exit from the EU (28%, compared with 5%). There is some feeling that there is a degree of over-regulation at present and that less regulation would result in lower costs and cheaper products.
The positive side of regulation is that they are considered to help to maintain standards and ensure that businesses abide by the same rules to the benefit of fair competition and keeping the public safe.

3.1 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 = 530

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 **taxation, VAT, PAYE, National Insurance and business rates**. Three-fifths of respondents (61%) selected this range of compulsory business costs. This proportion increases to 73% amongst small businesses (10-49 employees) and is significantly higher than average amongst food and beverage services businesses (66%) and also relatively high amongst those in the accommodation sector (68%).

Competition in the market is cited by around half of respondents (53%) and the extent to which this is a concern, threat or barrier to success varies little by business size or sector.

More than two-fifths of respondents cite **staff recruitment and skills** (47%), **regulations and red tape** (46%) and the **National Living Wage** (46%) as concerns, threats or barriers to success. All of these 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.

The UK's exit from the EU is considered a concern, threat or barrier to success of the business by around two-fifths of respondents (38%). This proportion is significantly higher within small businesses than micro businesses (46% of those with 10-49 employees, compared with 35% of those with less than 10 employees) and significantly higher than average amongst manufacturers (54%) and wholesalers (63%). It is a concern, perceived threat or barrier to success for 81% of exporters and 62% of importers. Businesses in Northern Ireland are particularly concerned about this issue (52%, compared with 37% in England and 31% in Wales).

Other issues are of less significance overall, but feature more strongly for some businesses. A third of respondents mention **lack of adequate broadband** (32%), but this increases to two-fifths of small businesses (41% of those with 10 to 49 employees) and more than two-fifths within the accommodation sector (46%).

More than a quarter of respondents (28%) consider **workplace pensions** a concern. Again, this increases significantly within small businesses (46% where there are 10-49 employees) and where there is more than one site within the organisation (47%). Similarly to the National Living Wage it is logical that this is related to the number of employees.

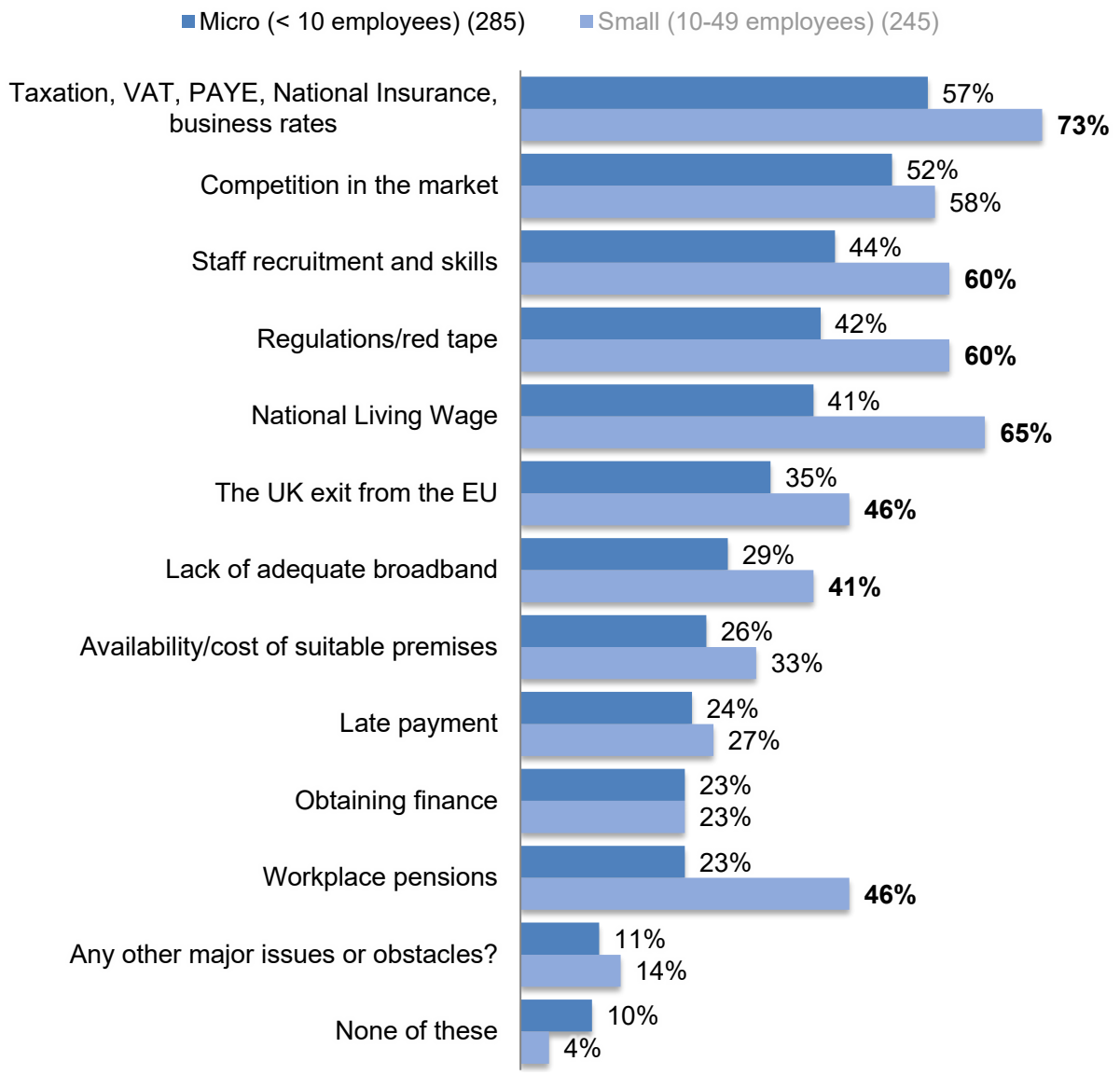
The availability and/or cost of suitable premises is a concern, threat or barrier to success for just over a quarter of respondents (27%). It is much less of a concern for businesses in Wales (13%) than England (28%) and Northern Ireland (32%), and for manufacturers (15%) and accommodation businesses (14%).

Late payment is a concern for a quarter of respondents (25%) and this is a more significant issue for businesses in primary food production (45%), wholesale (45%) and manufacturing (39%) sectors.

Just under a quarter of respondents (23%) consider **obtaining finance** a concern, threat or barrier to the success of the business. It is of significantly greater concern for exporters (40%), those importing from outside the EU specifically (42%) and multi-site businesses (43%). However, the businesses with these characteristics account for no more than one in ten of those that are concerned about obtaining finance.

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 business 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?

Concerns, perceived threats and barriers to business success within the different sectors are summarised in the table below. (Statistically higher than average responses – already mentioned - are highlighted in bold.)

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

		Sector					
	All	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services
Taxation, VAT, PAYE, National Insurance, business rates	61%	52%	49%	48%	53%	68%	**66%**
Competition in the market	53%	52%	50%	63%	56%	52%	52%
Staff recruitment and skills	47%	44%	36%	38%	39%	36%	**53%**
Regulations/red tape	46%	45%	**78%**	57%	47%	53%	42%
National Living Wage	46%	35%	36%	34%	49%	40%	**50%**
The UK exit from the EU	38%	36%	**54%**	**63%**	36%	34%	36%
Lack of adequate broadband	32%	40%	33%	32%	22%	**46%**	31%
Workplace pensions	28%	20%	23%	16%	32%	25%	30%
Availability/cost of suitable premises	27%	36%	15%	18%	29%	14%	27%
Late payment	25%	**45%**	**39%**	**45%**	25%	19%	18%
Obtaining finance	23%	30%	22%	22%	20%	19%	22%
Other	12%	10%	11%	10%	12%	8%	13%
None of these	8%	13%	5%	4%	8%	11%	8%
Unweighted bases	*530*	*67*	*55*	*59*	*99*	*69*	*181*

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?

3.2 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.

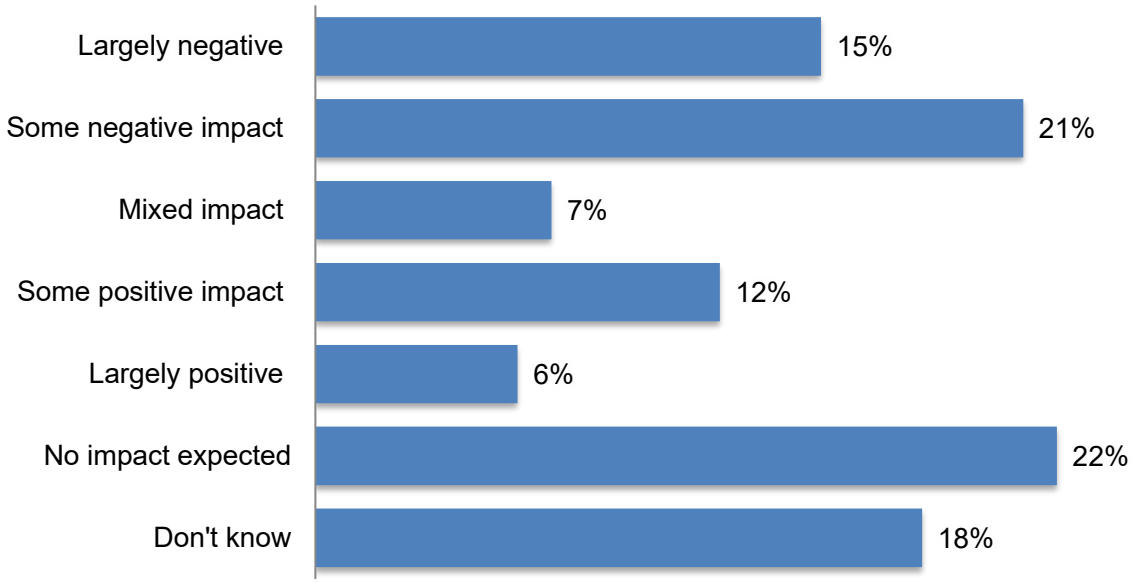
They are twice as likely to expect a negative impact as a positive one: Largely/some negative impact, 36%; largely/some positive impact, 17%.

Just over one in twenty respondents (7%) believe the impact may be mixed.

More than a fifth of respondents (22%) do not expect the UK's exit from the EU to impact on their business at all. These respondents can be found entirely within businesses that do not export and are largely within those that do not import either.

A significant minority – one in six respondents (18%) – 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.

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



Unweighted sample base = 530

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 significantly more likely than average to expect a negative impact. More than half (53%) expect at least some negative impact on their business, including 26% that expect there to be largely negative impact.

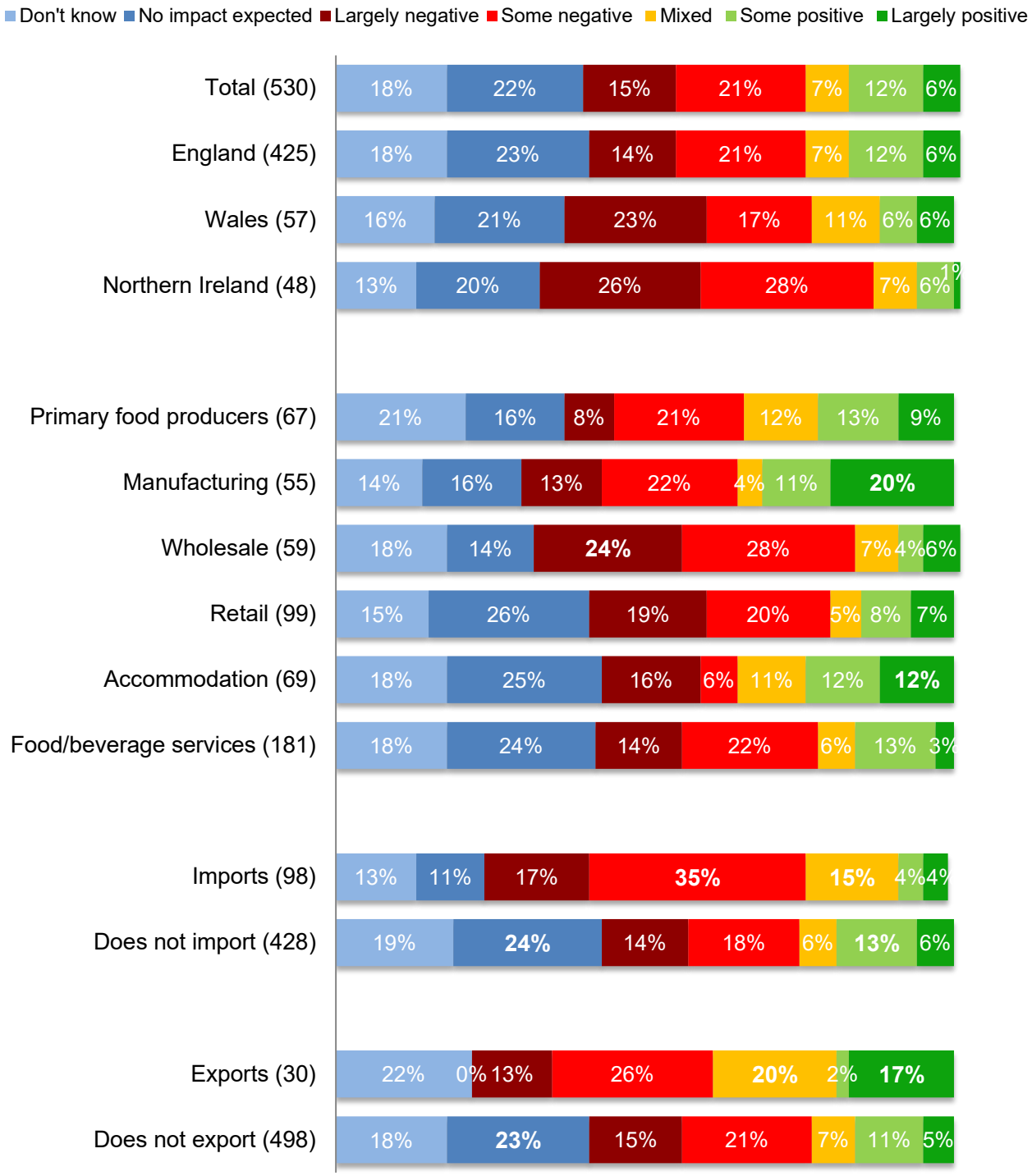
The negative bias is greater in larger businesses (43% of those with 10-49 employees) than in businesses with fewer than 10 employees (34%).

Respondents within wholesale businesses tend to have more negative expectations than those in other sectors (52%, including 24% that expect a largely negative impact), while those in the manufacturing sector are more likely than average to expect the impact of the UK's exit from the EU to be positive (31%, including 20% that expect it to be largely positive).

Primary food producers are slightly less likely than average to be negative and slightly more likely than average to be positive about the impact that the UK's exit from the EU is expected to have on them (29% and 22% respectively). One in eight, a slightly higher proportion than average (12%) feels it will have a mixed impact. This is somewhat reflected and magnified in the views of exporters (the majority of whom are within the primary food production sector) with exporters significantly more likely than non-exporters to expect a largely positive impact (17%, compared with 5%) and also more likely to anticipate a mixed impact (20%, compared with 7%).

Respondents within businesses that import are significantly more likely than those that do not import to expect the impact to be negative (52%, compared with 33%). However, both are similarly likely to expect a largely negative impact (17% and 14% respectively).

Figure 4: Anticipated impact of the UK's exit from the EU on the business, by nation, sector and overseas trading (all respondents)



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?

3.2.1 Views on the impact

Respondents were asked why they anticipate the impact on their business of the UK's exit from the EU in the way that they do.

Across all respondents the most frequently expressed concerns were about the possibility of increased product/service prices and a potential reduction in spending among tourists and general customers.

Respondents with a negative outlook with regard to the UK's exit from the EU (36% of all respondents) gave the following reasons for having this view.

Staffing/recruitment/skills difficulties (14% of those expecting a negative impact, increasing to 35% within small businesses – 10-49 employees);

Import/export tariffs/taxes (14%, increasing to 66% of exporters);

Increased cost of living/general costs (13%, increasing to 27% of businesses established for between 1 and 5 years);

Exchange rates will increase/value of the pound will be reduced (10%, increasing to 13% in Northern Ireland, 42% of wholesalers and 45% of importers/exporters/ distributors);

General uncertainty affecting the business (10%, increasing to 31% in Northern Ireland, 33% of wholesalers; 36% of importers/exporters/distributors).

Other negative impacts mentioned by fewer than one in twenty respondents expecting a negative impact included, increased raw materials/ingredients prices (9% of those expecting a negative impact), lack of availability of products (4%), economic shrinkage/recession (4%); job losses/business closures (5%).

Comments from these respondents that help to illustrate these concerns include:

> "Once that happens I think the prices for bringing goods in will go up and the taxes and everything else is going to go up in price no matter what."

> "I expect food prices to increase significantly. I expect the economy to suffer because of Brexit. Taxes may increase. I expect the lack of skilled workforce that is available in EU countries ... migrants will be lacking who also bring a work ethic the UK don't seem to have and I expect energy prices to increase."

> "Scared of the unknown, [this] country doesn't look after farmers and are more bothered by environment and importing food from abroad."

> "Employing staff, especially part time staff; we find it difficult to get local staff, we rely on European employees. Half of the work force is mainly European, we would like to know how we could replace the staff that would be our main concern, we need some help in that direction and how to recruit in the UK."

> "Guests are going to find it difficult to come over once the UK leaves the EU. They usually come in large groups and this is going to be difficult for them as visas would be a hassle."

> "The first concern is more expense because we import so there will be new expenses for importation and more pressure for having documentation and the exchange rate is going to be affected. Staff recruitment will be a huge challenge with Brexit. 98% of our business is generated by the niche Portuguese population, so we will struggle with staff."

> "It will open the door for poor quality stuff coming from America and other countries."

Respondents with a positive outlook with regard to the UK's exit from the EU (17% of all respondents) gave the following reasons for having this view.

Increased sourcing of home grown/local/British produce (19% of those expecting a positive impact);

Less restrictive regulations/red tape (14%);

More people spending including UK tourists (14%).

Six to seven per cent of respondents expecting a positive impact (each) mentioned other positive impacts including **that things would be generally better**; **better/free trading**; and **cheaper prices**.

Comments from these respondents that focus on the possible positive impacts include:

> "Rules are going to be more relaxed; import taxes from America will come up with a better trade deal."

> "Customers continue to come from the world, not just the EU and locals, so it really won't affect the business. If one doesn't come, another one will."

> "Think it will free us from certain regulations and free up the business a bit more."

> "If it becomes more expensive to travel to Europe more British people will take holidays in the UK which means more business as we are a holiday business."

> "People might use local produce around the area instead of shipping it in."

> "The dairy industry is a net importer of dairy products and any higher taxes and restrictions of importing into the country will benefit production."

> "When this was started in the factory markets, it was all to do with trade. And Britain can stand on its own two feet. There is also a larger market to trade with."

The views of respondents who believe that the impact will be mixed feel that (as one would expect) the UK's exit from the EU is likely to have both negative and positive impacts (31% of those expecting a mixed impact); there is general uncertainty of what's going to happen (28%) and; reflecting a more negative view, increased product prices (19%).

Comments from these respondents include:

> "A lot of the products that I sell to customers are largely imported, cost of imports will increase; increase in wages; business rates could also affected. However, there could be a positive impact if you use local suppliers, price of local product will hopefully come down as they may get more funding."

> "People from England may stay in England more which may increase our sales, or tourists may visit more if prices are cheaper. None of us really know what's going to happen."

> "No one knows what will happen. All depends on the deal agreed so can't say if positive or negative but perhaps mixed impact."

A third of respondents that do not expect the UK's exit from the EU to have an impact or did not know whether it would have an impact or not simply said they do not expect their business to be affected (31%), while slightly fewer stated that their business does not deal with the EU, only trades within the UK and locally (25%) and two in five (44% of those that do not expect an impact or do not know) are not sure how their business would be affected by the UK's exit from the EU.

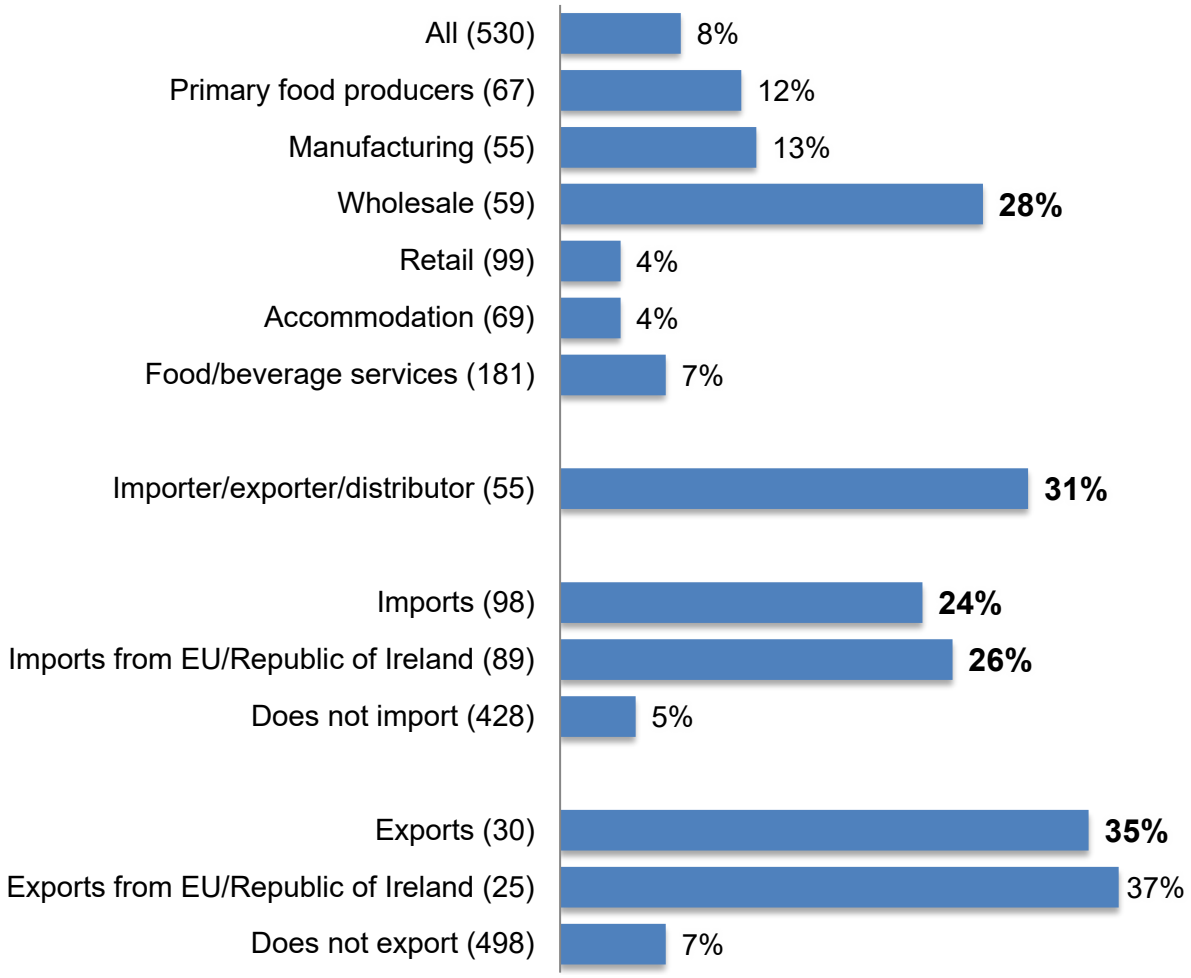
3.3 Preparing for the UK's EU exit

Just one in twelve respondents (8%) reports that their business is doing something to prepare for the UK's EU exit. This proportion increases significantly within businesses with between 25 and 49 employees (15%), and slightly within multi-site businesses (12%).

Those businesses that have trading relationships overseas and particularly with EU/Republic of Ireland customers and suppliers are significantly more likely than average to be preparing. This is reflected in the significantly higher proportion of wholesalers that are preparing for the UK's EU exit (28%) and more specifically in the proportion of importers from EU/Republic of Ireland (26%) and exporters (35%) that are doing something to prepare for it.

A third of all importers, exporters and distributors in aggregate (31%) are preparing for the UK's exit from the EU.

Figure 5: 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?

3.3.1 Preparing for the UK's exit from the EU

When asked what their business is doing to prepare for the UK's exit from the EU, the 8% of all respondents that reported business is doing something gave a variety of responses, including more passively hoping for the best (6% of these respondents – 2 cases).

The most frequently mentioned activity was increasing product prices (17%), followed by securing staff i.e. taking measure to ensure existing/potential staff has the right working visas (13%). One in ten cited general contingency plans (11%) and/or securing suppliers – taking to existing/potential suppliers to ensure they can provide products/services (10%). Slightly fewer stated that their business is sourcing more products locally/within the UK (8%).

Among those doing something to prepare, one in twenty respondents (5% - all micro retail businesses) are closing or selling their business, while slightly fewer are bulk buying/stockpiling (3% - all of which are in food production) and/or becoming self-sufficient (3% - within the food/beverage services sector).

Other activities to prepare for the UK's exit from the EU include diversification; putting project/product launches on hold; downsizing; and currency-hedging.

The following respondent comments highlight the key points:

> "Liaising with the supplier in advance to mitigate price increases in order to ascertain availability and cost increases."

> "Already looking at new sources and suppliers."

> "We pray a lot in terms of Brexit, the possible break-up of the union and other government aspects. We are also working on our strengths and working hard to improve those in order to ensure the UK exit from EU has minimal impact on our business."

> "Putting some renovation work on hold until we leave the Brexit and what happens after that."

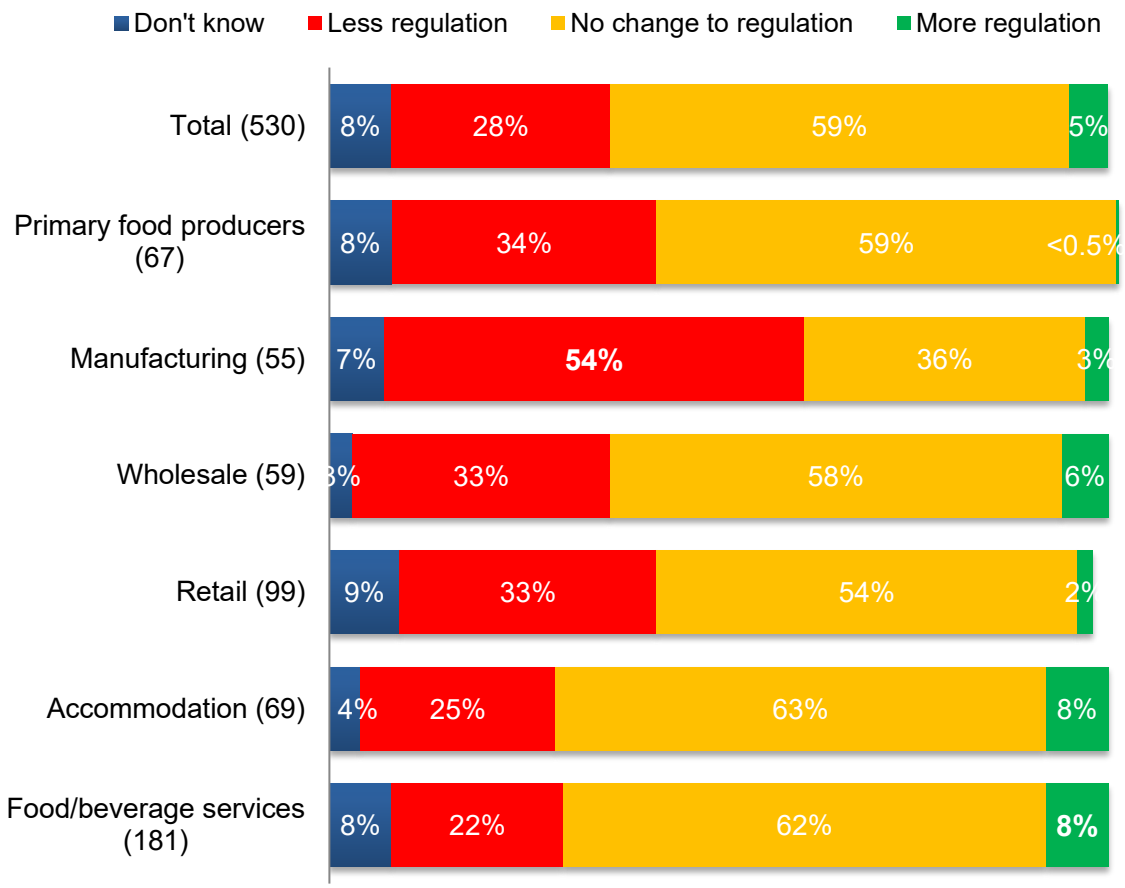
> "Closing and jumping to another industry before dealing with the impact of Brexit."

3.4 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. The majority (59%) hope it will not change, with the remainder more likely to be hoping for less regulation than more (28%, compared with 5%).

Manufacturers are significantly more likely than average to be hoping for less regulation (54%), while the proportion hoping for less regulation is lowest amongst food and beverage services (22%).

Figure 6: Hopes for level of regulation around food following the UK's exit from the EU, by sector (all respondents)



Unweighted sample bases in parentheses

B8. On the whole, which of the following best describes how you hope regulation around food in the UK will change as a result of the UK voting to leave the European Union? Will you hope for...

3.4.1 Reasons for hoping for more regulation

Of the 5% of all respondents hoping for more regulation as a result of the UK leaving the EU. one in five (19%) feels that it would be beneficial for everyone to abide by the same rules. Other reasons for thinking this way revolve around regulations switching to those set by the UK, while there is concern that current good standards should be upheld. For these respondents the under-lying view is that regulations are beneficial and keep people safe.

> "Think at the moment there is a good standard, and worried it will slip when we don't have an outside influence and the government will not agree to good deals and food standards will plummet."

> "It makes food safer, adds value if people see that the food is safe to eat and passes all regulations."

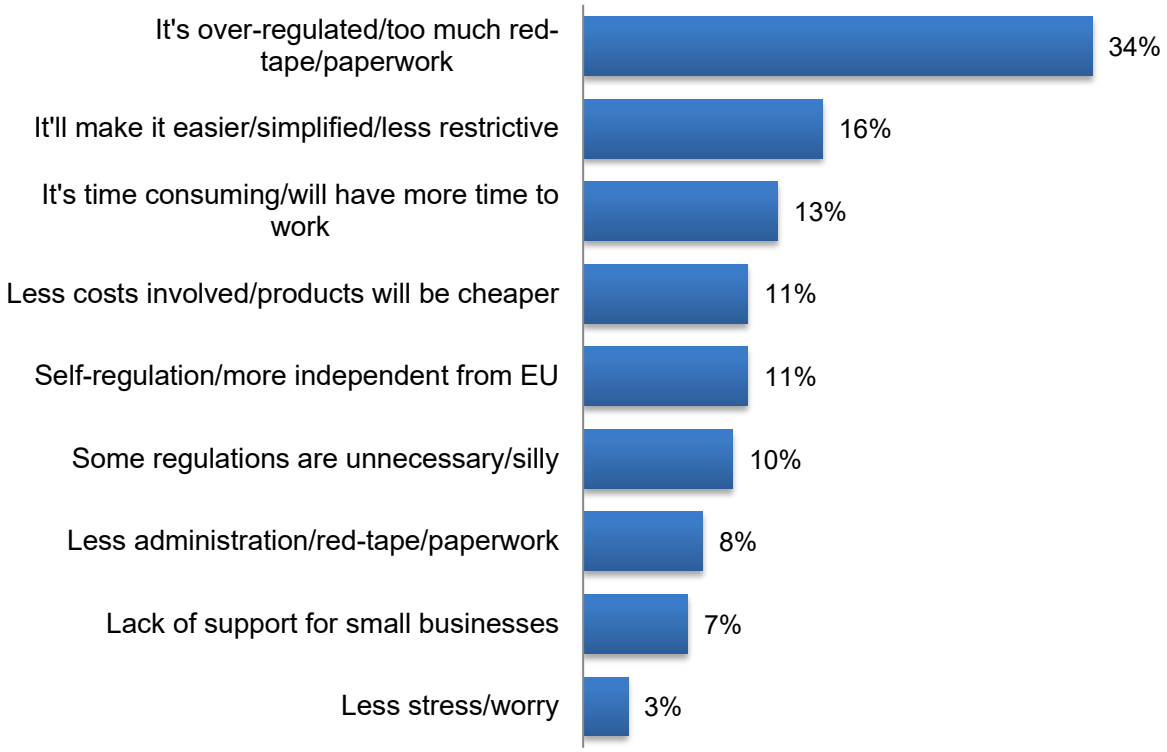
"We are all on the same path. Food safety is a massive concern. Should be applied across the board."

3.4.2 Reasons for hoping for less regulation

Of the more than a quarter of all respondents (28%) that are hoping for less regulation after the UK's exit from the EU, a third of these respondents feel the industry is over-regulated at present (34%); and half this proportion (16%) hoping that less regulation will help to simplify things and be less restrictive.

A few respondents talk about how time-consuming regulations and what goes with them is (13%). Others feel that less regulation will mean lower costs and cheaper products (11%) and/or more independence from the EU (11%), while a similar proportion consider some regulations unnecessary or even silly (10%).

Figure 7: Reasons for hoping for less regulation following the UK's exit from the EU (where hoping for less regulation)



Unweighted sample base = 171

B9. Why do you say that?.

Respondents comments with regard to hoping for less regulation include:

"I seem to be spending more time in my office doing paperwork when I should be behind my Bar with my customers."

"Too silly in the EU. Trying to eliminate every risk; they can't do that. We can only do so much, and restrictions mean inability to do things and get on with it."

"Purely food waste, food is getting dumped because it doesn't meet the EU criteria. There is a lot of wastage."

"At the moment there is a lot of red tape throughout the world and a lot of other countries don't have regulations like we have and I'd like for them to have the same regulations because we have a lot of red tape for being dairy farmers."

"We want to sell food but there are so many regulations at present so hoping for less regulation after voting."

"Regulations do not equal food safety or quality on the whole. What does improve the food safety is working closer with my customers to ensure we produce the quality that they require."

4 Awareness of and Attitudes to Regulation

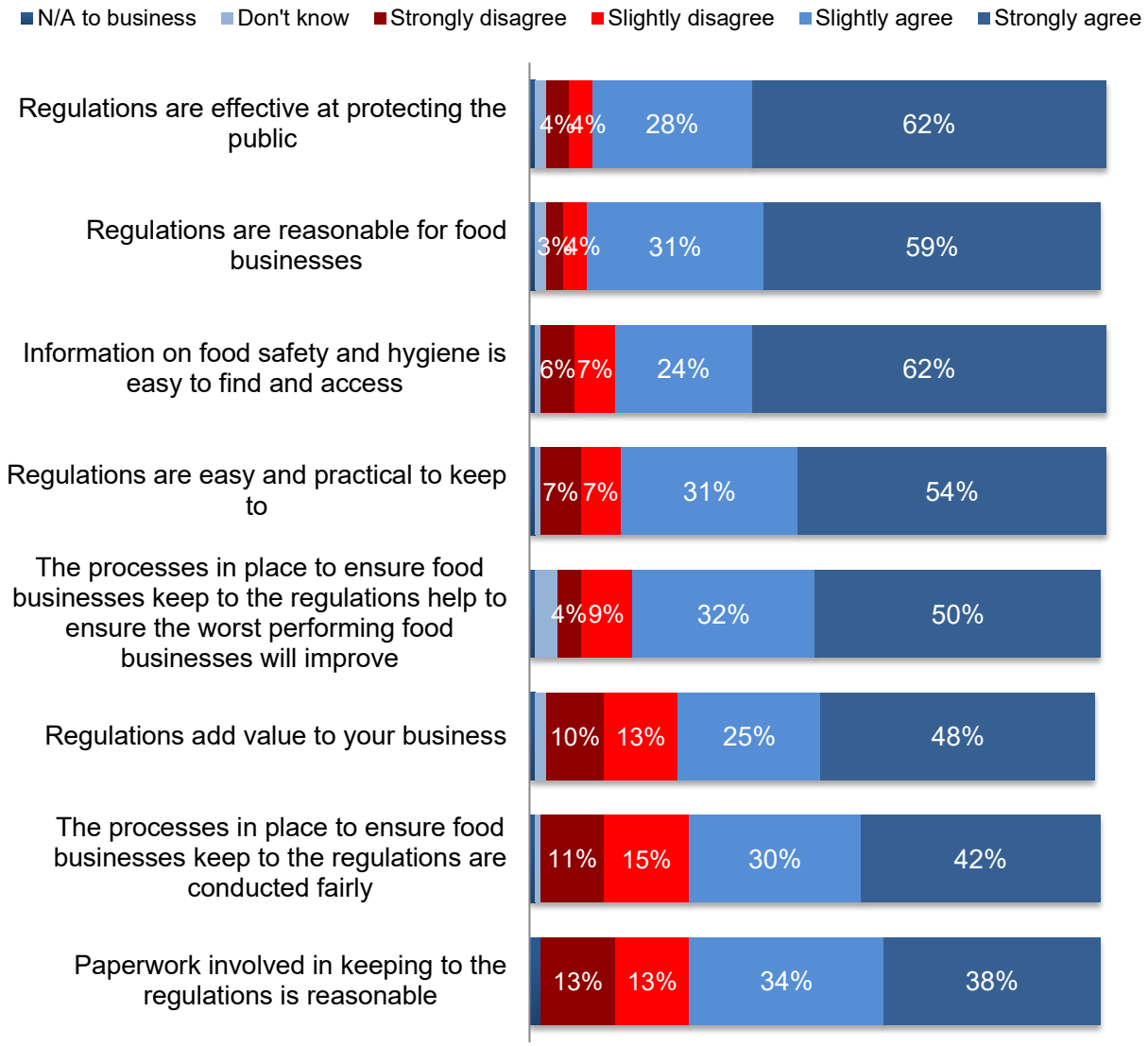
This chapter explores awareness of and attitudes towards food safety and food hygiene regulations amongst food businesses. It summarises how businesses obtain information on these issues, awareness of the FSA and use of its services. Perceptions of the FSA among those aware of it are explored.

Awareness of and attitudes to regulation - key findings
Around three-fifths of respondents strongly agree that regulations are effective and reasonable and that information about them is easy to find and access.
Around half of respondents strongly agree that regulations are practical, useful and add value.
They are less likely to be positive about the processes in place to keep within the regulations.
There are more positive attitudes to regulation displayed within consumer-facing businesses that perform well against FHRS ratings.
The majority of respondents feel certain that all food businesses in the country are doing what they should to comply with food safety requirements, but significant minorities are not certain of this. There is least confidence with regard to measures that ensure 'traceability' and those designed to tackle misleading claims and labelling.
Local councils/authorities are a very significant source of information and support in meeting food safety and hygiene regulations for respondents.
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 these organisations is high.
The vast majority of respondents have heard of the FSA (94%) but few (just 9%) of these have had contact with the FSA in the last 12 months.
Again, face to face contact is the most common way in which businesses interact with the FSA. Although the level of trust (based on a small number of respondents) is lower than it is local councils/authorities, it is greater amongst those that have had direct contact with the FSA than amongst those that have not.

4.1 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 8: Extent to which respondents agree or disagree with statements about regulations (all respondents)



Unweighted sample base = 530 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 three-fifths strongly agree that **regulations are effective at protecting the public** (62%) and they **are reasonable for food businesses** (59%). A similar proportion strongly agrees that **information on food safety and hygiene is easy to find and access** (62%).

The largely positive attitudes to regulations continue to be reflected in the proportions that strongly agree that **regulations are easy and practical to keep to** (54%) and that **the processes in place to ensure food businesses keep to the regulations help to ensure the worst performing food businesses will improve** (50%).

More than four-fifths of all respondents agree with these statements.

Fewer respondents generally agree that **regulations add value to businesses** (73% agree; 48% strongly agree); **the processes in place to ensure food businesses keep to the regulations are conducted fairly** (72% agree; 42% strongly agree) and that **the paperwork involved in keeping to the regulations are reasonable** (72% agree; 38% strongly agree).

Focusing firstly on whether regulations are **effective at protecting the public** and **reasonable for food businesses** (in the opinion of respondents), respondents within low performing businesses (with an FHRS rating of 0-2) are more likely to disagree that this is the case than those within higher rated businesses (15%, compared with 7%).

Respondents within accommodation and food and beverage services businesses are more likely than those in other sectors to strongly agree that regulations are effective and reasonable (72%). Manufacturers are more likely than average to disagree (20%), but these respondents are still very much in the minority.

Table 2: Extent to which respondents agree or disagree that regulations are effective and reasonable, by sector and FHRS rating (all respondents)

		Sector						FHRS rating	
	All	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services	0-2	3+
Regulations are effective at protecting the public									
Strongly disagree	4%	5%	5%	0%	4%	2%	4%	2%	5%
Slightly disagree	4%	3%	**15%**	1%	3%	5%	4%	**13%**	2%
Slightly agree	28%	22%	38%	34%	34%	20%	27%	21%	29%
Strongly agree	62%	67%	38%	55%	57%	72%	64%	64%	62%
Regulations are reasonable for food businesses									
Strongly disagree	3%	3%	**9%**	1%	2%	2%	3%	2%	3%
Slightly disagree	4%	4%	4%	5%	8%	9%	3%	**10%**	4%
Slightly agree	31%	**43%**	**50%**	32%	35%	21%	26%	19%	31%
Strongly agree	59%	48%	35%	51%	53%	67%	**66%**	67%	61%
Unweighted bases	*530*	*67*	*55*	*59*	*99*	*69*	*181*	*48*	*339*

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

In terms of **regulations adding value to the business**, micro businesses (fewer than 10 employees) are significantly more likely than average to strongly agree (51%). Food and beverage services businesses are also particularly likely to strongly agree with this (55%). Nearly half of all manufacturers (46%) disagree that regulations add value.

Clearly there is a link between regulations adding value to businesses and having a direct relationship with the public. Half of all businesses that sell direct to the public strongly agree, twice that of businesses that do not (50%, compared with 25%).

Overall, 85% of respondents agree that **regulations are easy and practical to keep to**. The proportion is significantly lower than average amongst respondents in Wales (66%), where a third (33%) disagree that this is the case, compared with just 14% of all respondents.

The propensity to agree is also significantly lower than average within manufacturing (67%) and where businesses do not sell direct to the public (65%).

Respondents in low performing businesses (FHRS rating of 0-2) are significantly more likely than average to strongly disagree that regulations are easy and practical to keep to (14%).

There is considerable variation by sector with respect to whether respondents agree or disagree that **the processes in place to ensure food businesses keep to the regulations are conducted fairly**. Manufacturers are least likely to agree/most likely to disagree (49% and 48% respectively), with more than a quarter (27%) strongly disagreeing. This contrasts with around three-quarters of accommodation and food and beverage services businesses that agree that processes are conducted fairly (76% and 79% respectively). Furthermore, there are different views held by low performing and higher FHRS rated businesses.

These findings are summarised in the table below, in which statistically significantly higher than average responses are highlighted in bold.

Table 3: 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)

	All	Sector						FHRS rating	
		Primary	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services	0-2	3+
Strongly disagree	11%	**19%**	**27%**	5%	9%	3%	10%	8%	11%
Slightly disagree	15%	18%	21%	**26%**	**24%**	19%	10%	**25%**	12%
Slightly agree	30%	23%	23%	42%	32%	29%	31%	22%	32%
Strongly agree	42%	40%	26%	18%	31%	47%	**48%**	45%	44%
Unweighted bases	*530*	*67*	*55*	*59*	*99*	*69*	*181*	*48*	*339*

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

Most respondents agree that **the processes in place to ensure food businesses keep to the regulations help to ensure the worst performing food businesses will improve** (83%). This includes half of all respondents (50%) that strongly agree. The proportion that agrees is significantly higher than average within Northern Ireland (94%), where 71% of all respondents strongly agree that this is a benefit.

The proportion that agrees with this statement, that regulations help to ensure the worst performing food businesses will improve is significantly higher within businesses that sell direct to the public than those that do not (84%, compared with 59%). This is also reflected in the significantly higher proportions than average that agree within the accommodation (85%) and food/beverage service (86%) sectors.

Businesses that have achieved higher FHRS ratings are more inclined to agree with this statement than those with a rating of below 3 (85% of businesses rated at 3+, compared with 76% of those rated at 0-2).

Table 4: 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)

		Sector						FHRS rating	
	All	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services	0-2	3+
Strongly disagree	4%	3%	5%	2%	6%	6%	3%	4%	4%
Slightly disagree	9%	**18%**	9%	6%	11%	5%	6%	14%	6%
Slightly agree	32%	28%	**47%**	43%	36%	31%	30%	30%	32%
Strongly agree	50%	41%	31%	38%	44%	54%	**56%**	46%	**53%**
Unweighted bases	*530*	*67*	*55*	*59*	*99*	*69*	*181*	*48*	*339*

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

4.2 Views on paperwork and information

Nearly three-quarters of respondents agree that **the paperwork involved in keeping to the regulations is reasonable** (72%) and 26% disagree that it is.

Businesses involved in serving the public directly and within those sectors concerned with providing accommodation and food/beverages are more likely than those that are further removed from end consumers to feel that the paperwork is reasonable. Half of manufacturers (50%) disagree that it is reasonable, and a third of businesses in primary food production (31%), compared with 15% of accommodation and 25% of food/beverage service businesses.

There is little variation in views across FHRS ratings and little variation in views by business size. Businesses in Northern Ireland are slightly more likely than average to disagree that paperwork is reasonable (38%).

Table 5: 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)

		Sector						FHRS rating	
	All	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services	0-2	3+
Strongly disagree	13%	20%	**23%**	15%	11%	4%	12%	6%	14%
Slightly disagree	13%	11%	**27%**	11%	11%	11%	13%	19%	11%
Slightly agree	34%	39%	28%	34%	41%	43%	30%	20%	36%
Strongly agree	38%	27%	20%	28%	34%	41%	**44%**	**55%**	38%
Unweighted bases	*530*	*67*	*55*	*59*	*99*	*69*	*181*	*48*	*339*

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

The vast majority of respondents agree that **information on food safety and hygiene is easy to find and access** (86%), with the majority of these (62% 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 (87%, compared with 66%) and this is reflected in the views across the different sectors. However, it remains the case even within primary food producers and manufacturing sectors, where there is less likely to be direct contact with the public, that those disagreeing are in the minority. They account for just over a quarter of respondents in primary food production (26%) and manufacturing (28%).

There is little variation in the extent to which respondents agree or disagree by FHRS rating and just 7% of those within businesses with a low (0-2) FHRS rating disagree that information is easy to find and access. This suggests that lack of information is not necessarily the issue for these businesses.

Table 6: 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)

		Sector						Serves public	
	All	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services	Sells direct	No direct sales
Strongly disagree	6%	12%	8%	4%	3%	2%	6%	6%	9%
Slightly disagree	7%	14%	20%	10%	6%	6%	4%	6%	19%
Slightly agree	24%	19%	35%	33%	37%	16%	20%	23%	27%
Strongly agree	62%	54%	34%	44%	51%	76%	70%	64%	39%
Unweighted bases	*530*	*67*	*55*	*59*	*99*	*69*	*181*	*437*	*93*

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

In line with levels of agreement about the ease of finding and accessing information, 90% of respondents report confidence in knowing who to contact if they need advice on food safety or hygiene. This proportion increases to virtually all Northern Ireland respondents (99%) and respondents within accommodation businesses (97%).

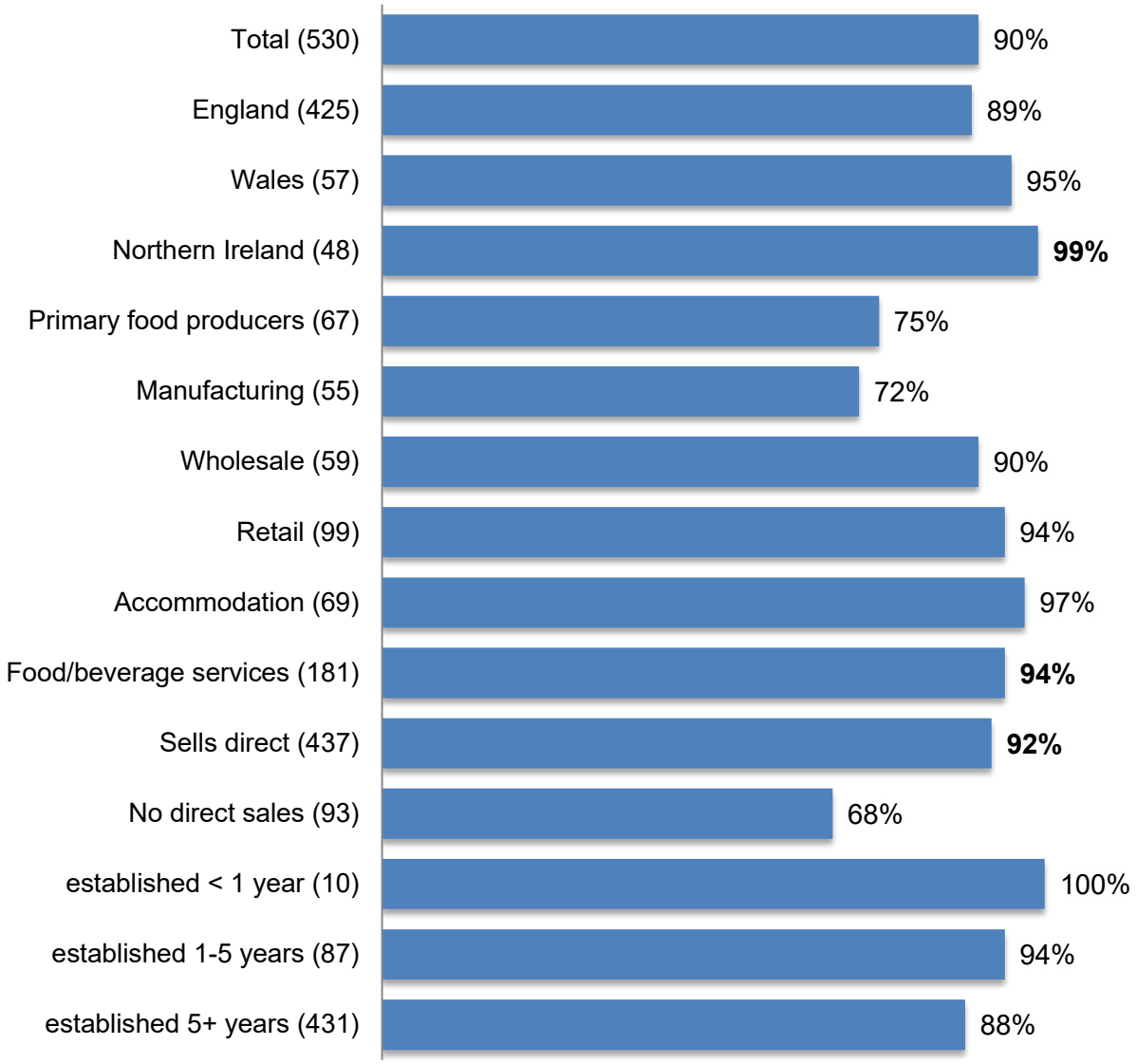
It is significantly lower amongst respondents that work in businesses that do not serve the public directly (68%) and this is reflected in a lower proportion of respondents within the primary food production (75%) and manufacturing (72%) sectors that feel they know who to contact if they need advice on a food safety or hygiene issue.

There is a gradual decline in confidence as years established increases, with all respondents within businesses that have been established in the last year knowing who to contact (although this is only a very small base), compared with just below nine in ten of those established for 5 or more years. This is likely to be a reflection of the need to obtain food safety or hygiene advice and the fact that the need declines with experience.

There is little variation in the proportions of those who feel they know who to contact if they need advice on a food safety or hygiene issue by FHRS rating, again suggesting that lack of information is not necessarily an issue for lower rated businesses.

These findings are summarised in the figure below.

Figure 9: Proportion of respondents that feel they know who to contact if they need advice on a food safety or hygiene issue, by nation, sector, sales to public and years established (all respondents)



Unweighted sample bases in parentheses

C1b. Do you feel you know who to contact if you need advice on a food safety or hygiene issue?

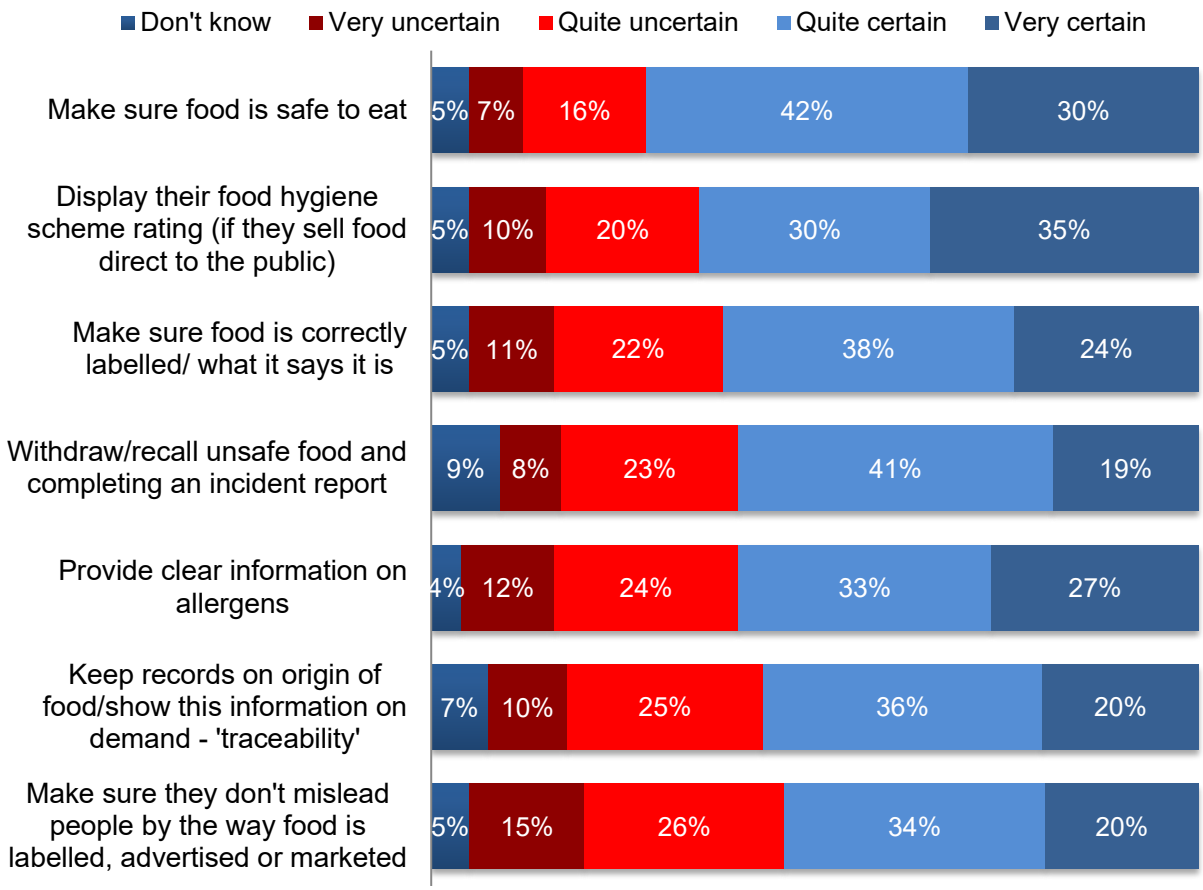
4.3 Confidence in the food industry and its adherence to regulations

Respondents were asked to indicate how certain or uncertain they are that all food businesses in the country 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.

Overall views are summarised in the figure below. Respondents have the greatest levels of confidence that all food businesses **make sure food is safe to eat** (72% are certain, including 30% that are very certain). Just under a quarter (23%) is uncertain that this is the case. They are less certain that all food businesses take necessary steps to protect the public from unsafe foods or foods that are unsafe for them. One in three is uncertain that **food is correctly labelled/what it says it is** (32%) and that all food businesses **withdraw/recall unsafe food and complete an incident report** (31%). A slightly higher proportion are uncertain that all food businesses **provide clear information on allergens** (36%) and that all **keep records on where they got food from and how this information on demand – known as 'traceability'** (36%). There is least confidence that all food businesses **make sure they don't mislead people by the way food is labelled, advertised or marketed** (41% are uncertain).

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

Figure 10: Extent to which respondents are certain or uncertain that all food businesses in the country are likely to be doing what they need to with regard to food safety and hygiene (all respondents)



Unweighted sample base = 530

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

4.3.1 Food safety

Activities that revolve around ensuring that food is safe to eat, that clear information is provided on allergens and that unsafe food is withdrawn or recalled are most strongly associated with food safety. Focusing on these collectively, there are higher levels of certainty, based on those that are very certain, in Wales and within food/beverage services businesses. Taking into account respondents that are quite certain, England falls short compared with Wales and Northern Ireland, particularly with regard to withdrawing or recalling unsafe food and providing clear information on allergens. Respondents within the wholesale sector are least likely to be certain that these activities are undertaken by all food businesses and are joined by manufacturers in this regard with it comes to certainty that clear information is provided on allergens.

Table 7: 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)

	All	Nation			Sector					
		England	Wales	Northern Ireland	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services
Make sure food is safe to eat										
Very uncertain	7%	7%	6%	2%	3%	5%	10%	9%	7%	7%
Quite uncertain	16%	17%	11%	14%	20%	22%	**27%**	21%	11%	13%
Uncertain	23%	24%	18%	16%	24%	28%	37%	30%	18%	20%
Quite certain	42%	42%	22%	**61%**	48%	46%	37%	35%	41%	43%
Very certain	30%	29%	**52%**	22%	21%	23%	19%	29%	31%	**33%**
Certain	72%	71%	74%	84%	69%	69%	56%	64%	71%	**76%**
Withdraw/recall unsafe food and completing an incident report										
Very uncertain	8%	8%	5%	1%	5%	11%	5%	7%	8%	9%
Quite uncertain	23%	24%	25%	11%	22%	21%	29%	21%	27%	24%
Uncertain	31%	32%	31%	13%	27%	32%	34%	29%	35%	33%
Quite certain	41%	41%	29%	**64%**	48%	44%	35%	39%	30%	42%
Very certain	19%	18%	**35%**	21%	13%	19%	19%	24%	24%	18%
Certain	60%	58%	64%	**85%**	60%	63%	55%	63%	55%	60%
Provide clear information on allergens										
Very uncertain	12%	**12%**	7%	3%	3%	19%	19%	12%	14%	13%
Quite uncertain	24%	25%	23%	15%	32%	28%	29%	25%	15%	22%
Uncertain	36%	37%	30%	19%	35%	47%	48%	37%	30%	35%
Quite certain	33%	33%	24%	42%	30%	29%	30%	37%	33%	33%
Very certain	27%	26%	**45%**	38%	25%	14%	21%	21%	32%	**31%**
Certain	60%	59%	69%	**81%**	55%	43%	51%	58%	65%	64%
Unweighted bases	*530*	*425*	*57*	*48*	*67*	*55*	*59*	*99*	*69*	*181*

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...?

4.3.2 Food labelling

In terms of the extent to which respondents are confident that all food businesses are following requirements to correctly label food, around three-fifths are certain that all food businesses make sure food is correctly labelled/what it says it is (62%), while just over half are certain that they are all making sure they do not mislead people by the way food is labelled, advertised or marketed (54%). Thus, a significant minority in each case are not confident about food labelling (32% and 41% respectively).

Respondents in Northern Ireland are significantly more likely than those in England and Wales to be certain that all food businesses provide correct and proper labelling on their products. Exporters are less confident than non-exporters in this area of food regulation. They are less likely to be certain about the food industry's adherence to food labelling requirements.

Table 8: 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 exporting activity (all respondents)

		Nation			Sector						Exporting activity	
	All	England	Wales	Northern Ireland	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services	Export	Do not export
Make sure food is correctly labelled/what it says it is												
Very uncertain	11%	**11%**	8%	2%	12%	**22%**	**20%**	10%	11%	9%	**24%**	10%
Quite uncertain	22%	22%	28%	16%	25%	19%	26%	22%	23%	20%	26%	21%
Uncertain	32%	33%	37%	18%	37%	40%	**46%**	32%	34%	30%	**51%**	31%
Quite certain	38%	39%	21%	44%	35%	35%	24%	36%	34%	42%	11%	39%
Very certain	24%	23%	**41%**	**37%**	19%	18%	25%	26%	27%	25%	5%	**25%**
Certain	62%	61%	62%	**81%**	54%	53%	49%	62%	60%	**67%**	45%	**63%**
Make sure they don't mislead people by the way food is labelled, advertised or marketed												
Very uncertain	15%	**16%**	6%	5%	18%	20%	22%	18%	13%	13%	23%	15%
Quite uncertain	26%	26%	29%	19%	29%	29%	29%	24%	25%	25%	31%	25%
Uncertain	41%	**42%**	36%	24%	47%	48%	52%	42%	38%	38%	54%	40%
Quite certain	34%	33%	31%	**55%**	36%	29%	25%	33%	33%	34%	40%	34%
Very certain	20%	20%	28%	20%	7%	14%	17%	23%	20%	**23%**	1%	**21%**
Certain	54%	52%	59%	**76%**	43%	44%	41%	55%	53%	**58%**	41%	**55%**

	All	Nation			Sector						Exporting activity	
		England	Wales	Northern Ireland	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services	Export	Do not export
Unweighted bases	*530*	*425*	*57*	*48*	*67*	*55*	*59*	*99*	*69*	*181*	*30*	*498*

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...?

By sector, food/beverage services businesses are significantly more likely than average to be certain that there is little misleading food labelling, advertising or marketing, while manufacturers and wholesalers are less certain than average. Views of wholesalers reflect those of exporters, of which they are a significant group (the majority of exporters are to be found in primary food production).

4.3.3 Traceability

In terms of 'traceability' i.e. keeping records on where they obtained food from and being able to show this information on demand, more than half of all respondents (57%) are certain that all UK food businesses fulfil this requirement. Around a third is not certain this is the case (36%).

One in five respondents (20%) are very certain that all food businesses can fulfil demands for traceability of the food products they use and this increases significantly amongst respondents in Wales (37%) and exporters (38%). Specialist retailers are also particularly likely to be very certain that all food businesses keep such records (31%).

There is less certainty with regard to all food businesses keeping records of the origins of food products among food/beverage services businesses (40% are uncertain) and, reflecting lower levels of confidence within this sector, amongst businesses that sell direct to the public (37%).

Table 9: 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 whether the business directly serves the public or not (all respondents)

	All	Nation			Sector						Sell directly to public	
		England	Wales	Northern Ireland	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services	Sell direct	No direct sales
Keep records on where they got food from and show this information on demand – known as 'traceability'												
Very uncertain	10%	11%	11%	4%	10%	15%	10%	7%	11%	11%	**10%**	12%
Quite uncertain	25%	26%	23%	19%	16%	19%	25%	25%	21%	**29%**	**26%**	13%
Uncertain	36%	37%	34%	24%	26%	33%	35%	32%	32%	**40%**	**37%**	25%
Quite certain	36%	36%	27%	**57%**	46%	40%	31%	31%	33%	36%	35%	**54%**
Very certain	20%	20%	**37%**	18%	18%	17%	24%	**29%**	28%	18%	21%	16%
Certain	57%	55%	64%	**75%**	64%	57%	55%	60%	61%	54%	56%	**70%**
Unweighted bases	*530*	*425*	*57*	*48*	*67*	*55*	*59*	*99*	*69*	*181*	*30*	*498*

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...?

4.3.4 FHRS rating display

Around two-thirds of respondents feel certain that all food businesses display their food hygiene scheme rating (if they sell food direct to the public) (65%), with a third very certain this is the case (35%). Three in ten respondents (30%) are not certain of this.

Northern Ireland respondents are significantly more likely than average to be confident that all food businesses display their food hygiene scheme rating (88% are certain, including 53% that are very certain), and respondents in England are the least confident across the three nations (63% are certain).

There are differences in views between respondents within businesses with a low FHRS rating of 0-2 and those within businesses with an FHRS rating of 3 and above. The latter are twice as likely as the former to be very certain that all food businesses that sell food direct to the public display their food hygiene scheme rating (42%, compared with 21%). This surely reflects the fact that they have a rating which presents their business in a favourable light. The proportion that is very certain increases to 47% of respondents within businesses with an FHRS rating of 4 (i.e. just those rated at 4).

Table 10: 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, by nation and FHRS rating (all respondents)

	All	Nation			FHRS rating					
		England	Wales	Northern Ireland	0-2	3+	3	4	5	No rating/awaiting rating
Display their food hygiene scheme rating (if they sell food direct to the public)										
Very uncertain	10%	10%	13%	1%	8%	10%	4%	5%	**13%**	12%
Quite uncertain	20%	**21%**	9%	10%	26%	19%	**41%**	15%	16%	18%
Uncertain	30%	**31%**	22%	11%	34%	29%	**45%**	20%	29%	30%
Quite certain	30%	30%	31%	35%	40%	24%	19%	29%	23%	**46%**
Very certain	35%	33%	44%	**53%**	21%	**42%**	35%	**47%**	**42%**	18%
Certain	65%	63%	75%	**88%**	61%	66%	54%	**75%**	65%	64%
Unweighted bases	*530*	*425*	*57*	*48*	*48*	*339*	*37*	*74*	*228*	*143*

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...?

4.4 External sources of information, advice and support

It is clear that micro and small food and beverage businesses are heavily reliant on their local council/authority for information and support in meeting food safety and hygiene regulations. Four-fifths of respondents (81%) spontaneously report that these local agencies play a role in providing this service.

The Food Standards Agency is the next most frequently cited when respondents are not prompted with a list of potential sources (9%), but a further 85% of all respondents had heard of the FSA when asked – although only 9% of all respondents report having had contact with the FSA with regard to food safety or hygiene issues in the last 12 months.

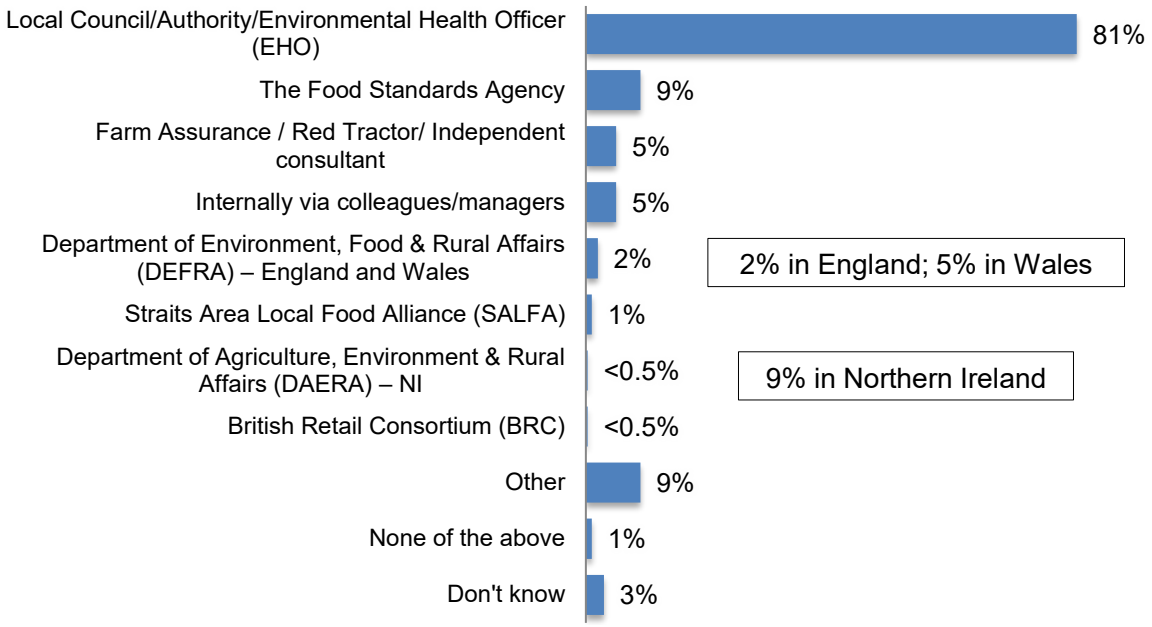
Other businesses cited as playing a role in providing information, support and/or checking that the business is meeting food safety and hygiene regulations are mentioned by no more than one in twenty respondents and include: Farm Assurance/Red Tractor/independent consultant (5%); DEFRA[11] (England and Wales) (2%); DAERA[12] (Northern Ireland) (9% - less than 1% of all) and the Straits Area Local

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

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

Food Alliance (1%). One in twenty (5%) mentioned colleagues within their business even though they were asked to think about external organisations.

Figure 11: 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 = 530

C4 In meeting food safety and hygiene regulations food businesses will usually deal with one or more external organisations or people. Who plays a role in providing information, support and / or checking that you are meeting the regulations, for instance doing inspections, in your business?

While few businesses cite organisations other than their local council/authority or EHO, those that do not directly sell to the public, mainly manufacturers and wholesalers, are significantly more likely than average to cite (varyingly) the FSA, DEFRA and Farm Assurance/Red Tractor as organisations that play a role for them in this regard.

Nearly half of manufacturers mention Farm Assurance/Red Tractor (47%), which is cited by one in three respondents within businesses that do not sell direct to the public (33%), while one in five manufacturers (19%) cite the FSA. One in eight manufacturers (13%) and one in seven wholesalers (15%) cite DEFRA.

4.5 Local authority/district council/DAERA

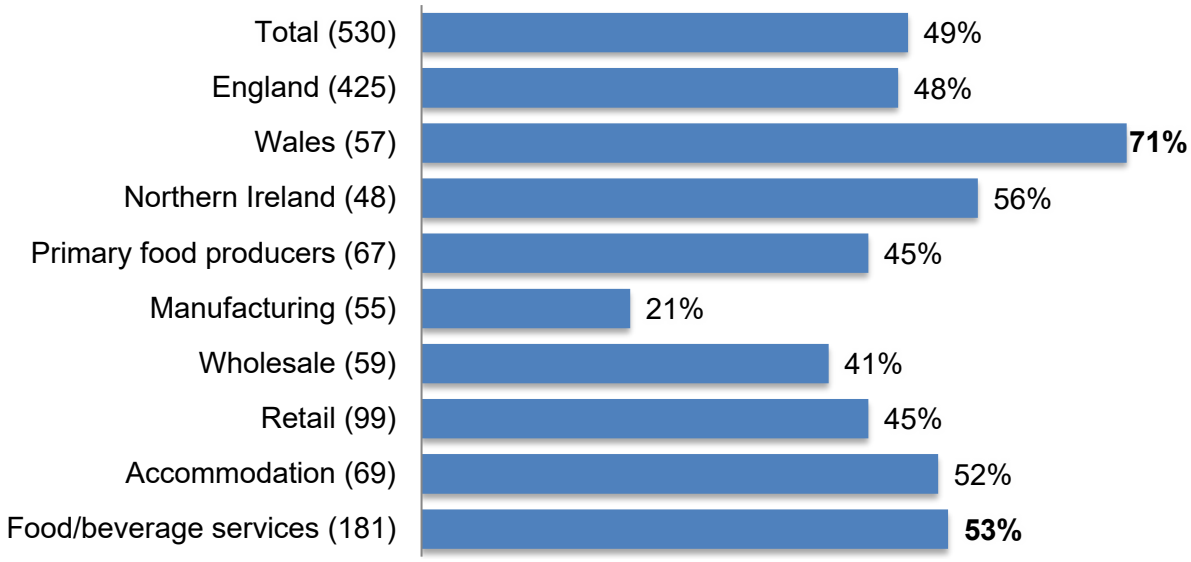
Half the respondents (49%) report their business having had contact with their local authority or council, or DAERA[13] (in the case of Northern Ireland) with regard to food safety or hygiene issues in the last 12 months.

The proportion of respondents reporting any contact is significantly higher in Wales (71%) and is most likely within accommodation and food/beverage services businesses (52% and 53%).

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

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 (51%, compared with 24%).

Figure 12: 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)

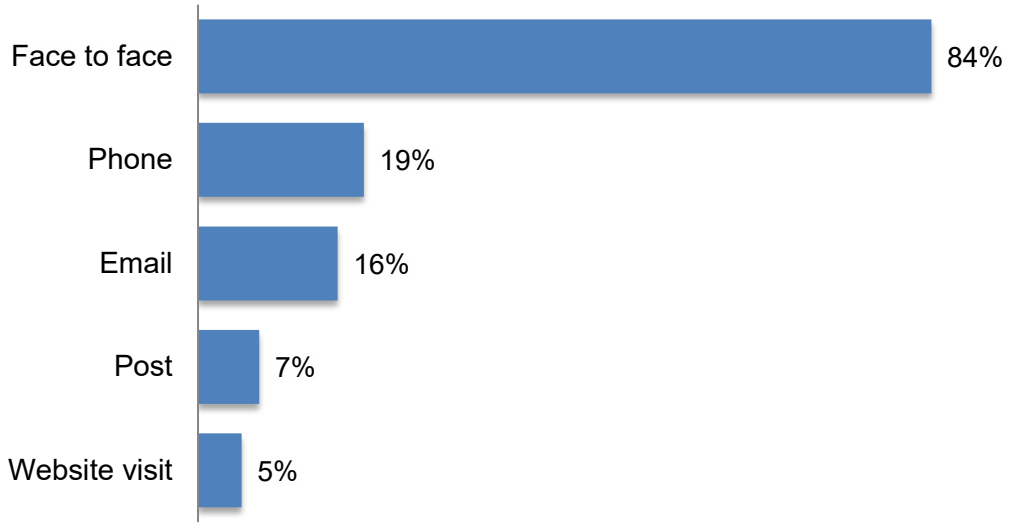


Unweighted sample bases in parentheses

C7. 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

Contact is most likely to have been face to face i.e. via inspections (84%). This increases to nearly all low rated businesses (98% where have an FHRS rating of 0-2) but also within businesses that have a good but not excellent rating (95% where have an FHRS rating of 4).

Figure 13: 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 = 251

C8. 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%).

4.6 Ratings of contact with local authority/council/DAERA

The 44% of respondents whose businesses 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.

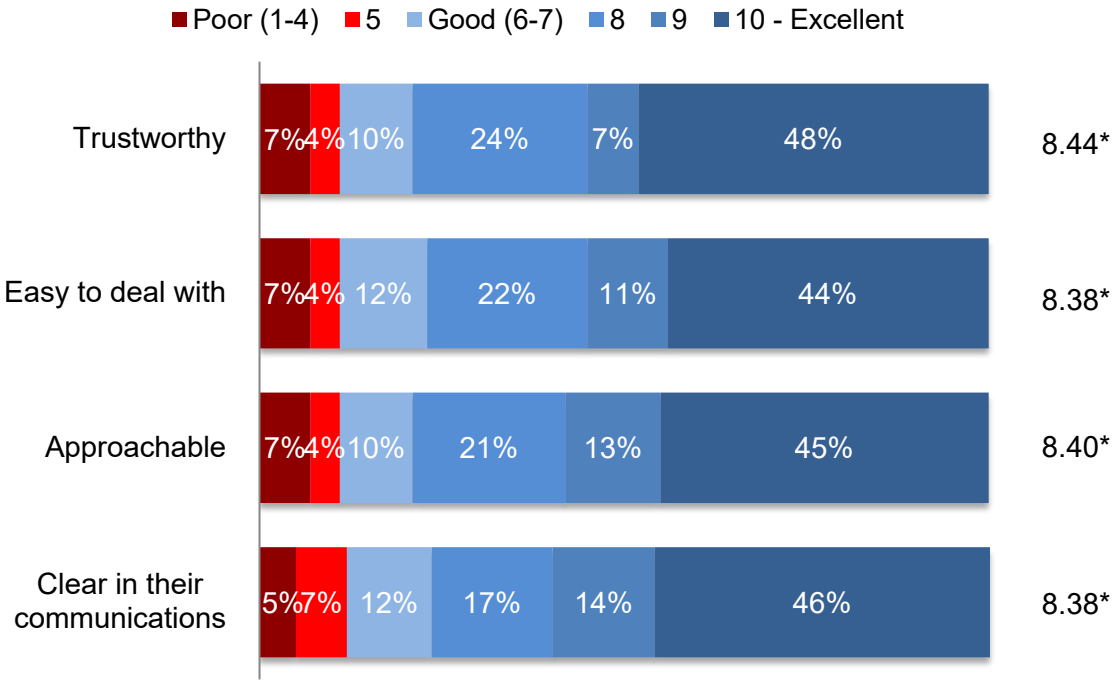
The aspects included:

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

Between two-fifths and a half of respondents rate their local authority/council/DAERA as excellent on all aspects, while 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 14: 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; 236

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

C9. Based on your recent contact with your local authority/ council/DAERA, how would you rate it on the following service aspects...?

4.6.1 Trustworthiness

Overall, 79% 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 48% that rate these agencies at 10 – excellent. At the other end of the scale, just 7% rate them as poor (1-4).

Respondents in Wales are significantly more likely than average to rate these agencies as poor with regard to trustworthiness (16%), while the proportion is also similar in Northern Ireland (15%). This compares to 5% of respondents in England. More than a quarter of respondents in low FHRS rated businesses (27%) rated the local authority/council/DAERA they have had contact as poor on trustworthiness.

4.6.2 Ease of dealings

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 easy to deal with. This includes 44% that rate these agencies at 10 – excellent. At the other end of the scale, just 7% rate them as poor (1-4).

Again, respondents in Wales are significantly more likely than average to rate these agencies as poor with regard to ease of dealing with them (16%), while the proportion is also similar in Northern Ireland (17%). This compares to 5% of respondents in England.

Around a quarter of respondents in low FHRS rated businesses (24%) rated the local authority/council/DAERA they have had contact as poor on the ease of dealings.

4.6.3 Approachable

Overall, 79% 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 45% that rate these agencies at 10 – excellent. At the other end of the scale, just 7% rate them as poor (1-4).

Respondents in longer established businesses are less likely than average to rate their local authority/council/DAERA as approachable, with around three-quarters giving a rating of between 8 and 10 (74% of those established for 5+ years). All respondents within businesses that have had such contact that are newly established (in the last year) rate their local authority/council/DAERA at 8-10 for being approachable.

Around a quarter of respondents in low performing FHRS rated (0-2) businesses (23%) rate their local authority/council/DAERA as poor on this aspect.

4.6.4 Clarity of communications

Overall, 76% 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 clear in their communications. This includes 46% that rate these agencies at 10 – excellent for this. At the other end of the scale, just 5% rate them as poor (1-4).

Respondents in Wales and Northern Ireland are more likely than those in England to rate their local authority/council/DAERA at 1-4 i.e. poor, with regard to this aspect of their service (16% and 17% respectively). Respondents in low performing FHRS rated businesses (0-2 rating) are also significantly more likely than average to rate these agencies as poor on this aspect (19%).

More than four-fifths of respondents within businesses with an FHRS rating of 4 or 5 (83%) rated their local authority/council/DAERA as excellent/very good (8-10) for the clarity of its communications, compared with seven in ten respondents (70%) within businesses with an FHRS rating of below 3.

4.6.5 Ease of obtaining all information needed

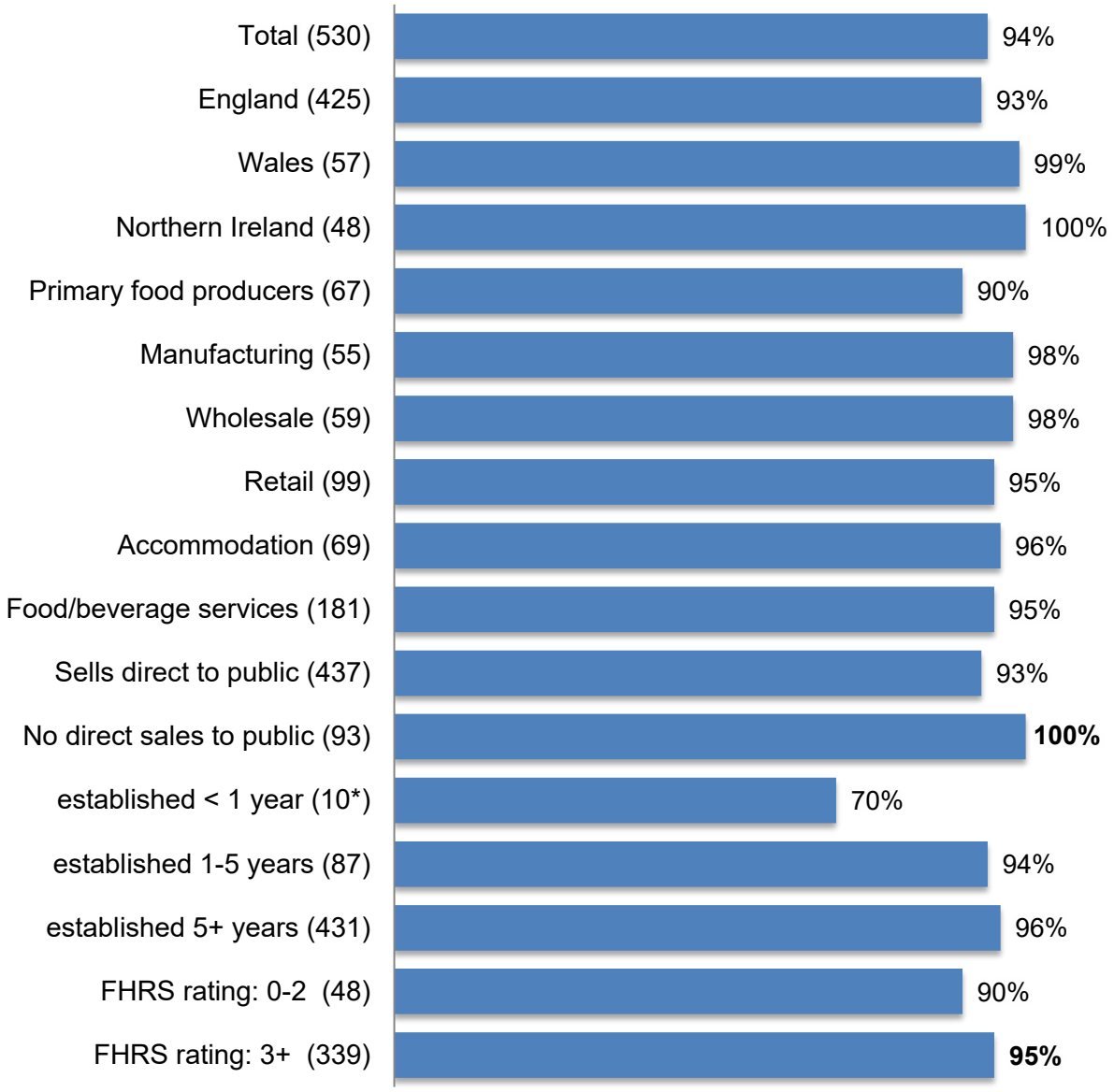
When asked how easy it was to obtain all the information needed from their local authority/council/DAERA, most respondents that have had any contact (including those that have only visited the website) (87%) considered it had been easy. This included 65% that found it very easy.

Just 7% have found it difficult to obtain all the information they need from their local authority/council/DAERA. This increases to one in five (19%) of respondents within businesses that have low FHRS rating (0-2).

4.7 FSA

In total 94% of respondents had heard of the FSA prior to taking part in the survey interview. This proportion is slightly lower than average amongst newly established businesses (70% of those established in the last year – although a very small base) and amongst low FHRS rated businesses (90% of those with an FHRS rating of 0-2, compared with 95% of those with an FHRS rating of 3+).

Figure 15: Proportion of respondents that were aware of the Food Standards Agency before the call (all respondents)



Unweighted sample bases in parentheses * caution: very small base

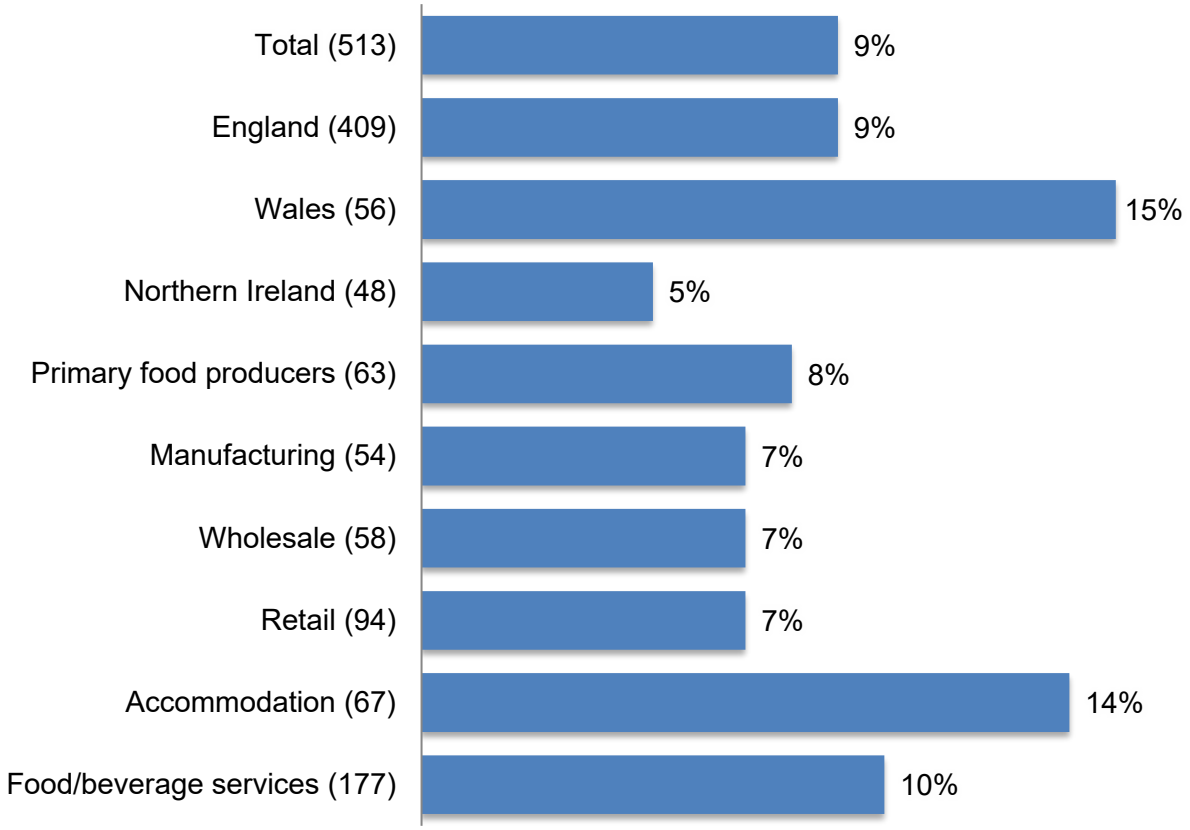
C5 Before today, had you heard of the Food Standards Agency?

Just 9% of respondents that are aware of the FSA (equating to – rounding up to - 9% 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.

The proportion of respondents reporting any contact is significantly higher than average where their business has a low FHRS rating (0-2) (17%).

Businesses that sell direct to the public are twice as likely as those that do not to have had contact with the FSA in the last 12 months (10%, compared with 5%).

Figure 16: Proportion of respondents that have had contact with the FSA with regard to food safety or hygiene issues in the last 12 months (all respondents)

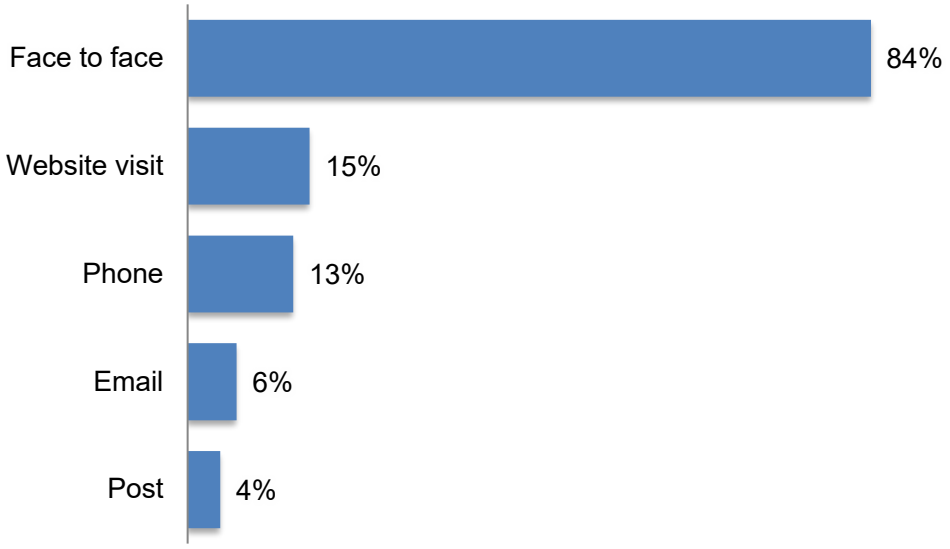


Unweighted sample bases in parentheses

C11. In the last 12 months, have you had any contact with the FSA with regard to food safety or hygiene issues?

Similarly to contact with local authorities/councils/DAERA, respondents are most likely to have had face to face contact with the FSA (84%), and one in eight (13%) have had contact via phone. One in seven of those that have had contact with the FSA (15%) have visited the FSA's website.

Figure 17: Modes of contact with the FSA with regard to food safety or hygiene issues in the last 12 months – prompted, multiple response (where had contact)



Unweighted sample base = 47

C12. Was this by ...?

4.8 Understanding of the FSA's role

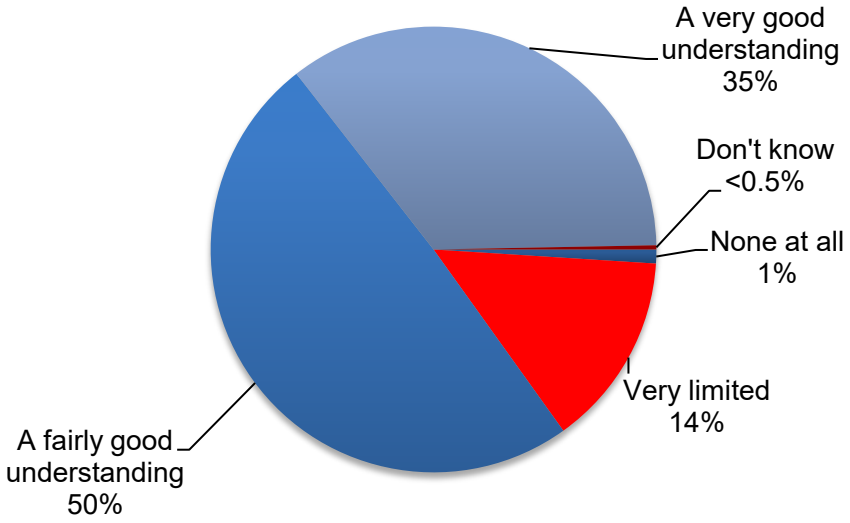
The vast majority of respondents that are aware of the FSA feel they have at least a fairly good understanding of the FSA's role (84%). This includes 35% that feel they have a very good understanding of its role.

The propensity to perceive their understanding of the FSA's role as very good is significantly higher amongst respondents in Northern Ireland (49%), although one in ten Northern Ireland respondents (10%) feel they have no understanding at all of the FSA's role, compared with 1% of all respondents in England and 6% in Wales.

Respondents within food/beverage services businesses are significantly more likely than those in other sectors to feel they have a very good understanding of the FSA's role (42%) and respondents within businesses that sell directly to the public are significantly more likely than those that do not to feel they have a very good understanding (36%, compared with 21%).

Respondents within manufacturing businesses are significantly less likely to have confidence in their level of understanding of the FSA's role; 29% feel they have only a limited understanding, compared with an average of 14%.

Figure 18: Respondents' perception of their understanding of the role of the Food Standards Agency (where aware of the FSA)



Unweighted sample base = 494

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

4.9 Ratings of contact with the FSA

The 7% of respondents whose businesses have had contact with the FSA (not including those that have only had contact via the website) were asked to rate the FSA, based on their contact with it, on a number of aspects.

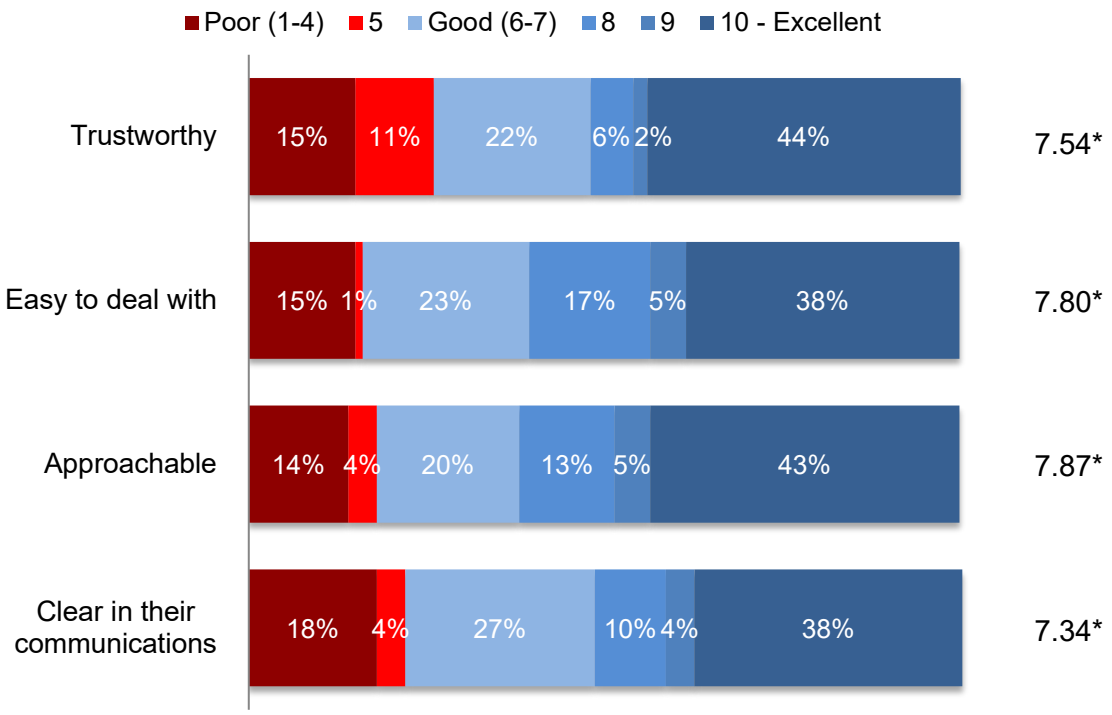
The aspects included:

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

Around two-fifths of respondents rate the FSA as excellent on all aspects, while one in seven rates 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.

Figure 19: 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 but not through website visits only)



Unweighted sample base; 40

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

C13. Based on your recent contact with the FSA, how would you rate it on the following service aspects...?

4.9.1 Trustworthiness

Just over half of respondents that have had contact with the FSA (52%) rated the FSA at 8 and above on the scale of 1-10 for trustworthiness. This includes 44% that rate it at 10 – excellent. One in seven (15%) rate them as poor (1-4).

Sub-sample bases are low with regard to contact with the FSA so there are no significant differences in views between groups. However, some indicative differences are worth noting, such as more than two-fifths of respondents in low FHRS rated businesses giving a poor rating (43% rating trustworthiness at 0-4), compared with none within businesses with an FHRS rating of 4 or 5. More than four-fifths of respondents within businesses that have the highest FHRS rating of 5 (83%) rate the FSA as excellent/very good (8-10).

4.9.2 Ease of dealings

Overall, 60% 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 38% that rate the FSA at 10 i.e. excellent. At the other end of the scale, 15% rate the FSA as poor (1-4).

Respondents in Wales and Northern Ireland are more likely than those in England to rate the FSA as excellent/very good (73% and 72%, compared with 59% respectively). Around two-fifths of respondents in low FHRS rated businesses (43%) rated the FSA as poor on ease of dealing with it.

4.9.3 Approachable

Overall, 61% 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 43% that rate it at 10 – excellent. One in seven (14%) rate them as poor (1-4).

Again, around two-fifths of respondents in low performing FHRS rated (0-2) businesses (43%) rate the FSA as poor on this aspect.

4.9.4 Clarity of communications

Overall, 51% 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 38% that rate the FSA at 10 – excellent for this. One in six (18%) rate them as poor (1-4) in this respect.

Again, respondents in low performing FHRS rated businesses (0-2 rating) are more likely than average to rate the FSA as poor with regard to clarity of communications (43%).

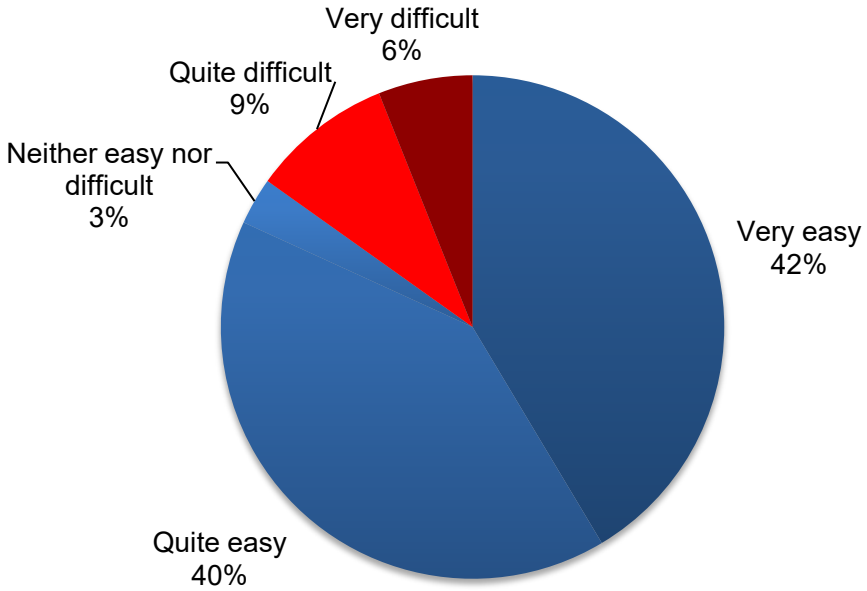
Most businesses with an FHRS rating of 5 (97%) rate the FSA as excellent/very good (8-10) for the clarity of its communications, compared with just under half the respondents (48%) within businesses with an FHRS rating of below 3.

4.9.5 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) (81%) considered it to have been easy. This included 41% that found it very easy.

One in seven (15%) have found it difficult to obtain all the information they need from the FSA. This increases to one in six (17%) of respondents within businesses that have low FHRS rating (0-2), compared with just 3% of respondents within businesses that have an FHRS rating of 3 and above.

Figure 20: Ease of obtaining all the information needed from the FSA (where had contact)



Unweighted sample base = 47

C14. How easy was it to obtain all the information you needed from the FSA?

4.10 Perceptions of and trust in the FSA

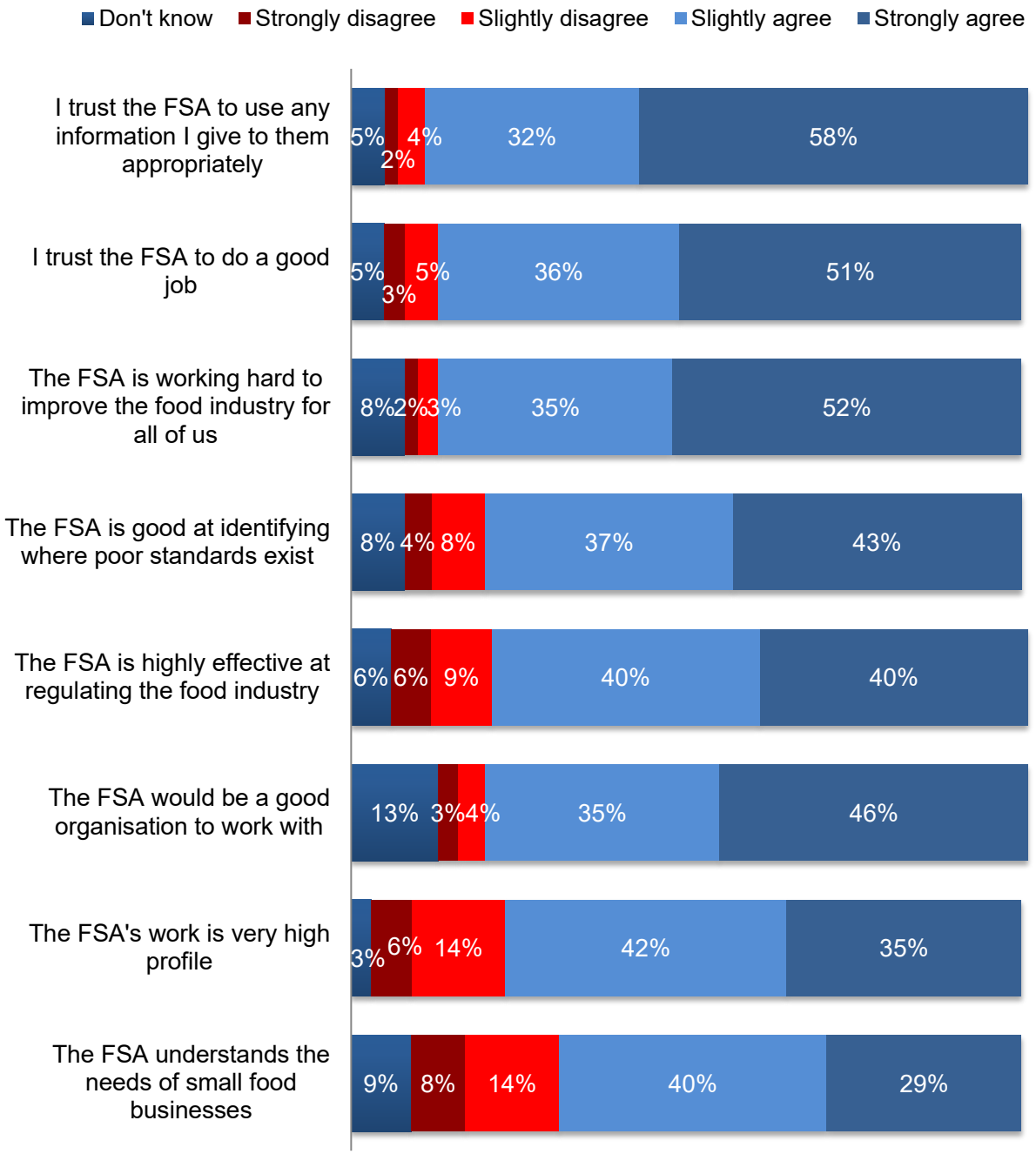
Respondents aware of the FSA prior to being called to participate in the survey (94% of all respondents), were asked to indicate the extent to which they agree or disagree with a number of statements about the FSA. These statements revolve around how effective the FSA are; the value of what the FSA do; the profile of the FSA within the industry and the trust placed in the FSA.

Their responses are summarised in the figure below.

There is particularly strong agreement with statements about trust in the FSA; 90% agree that **they trust the FSA to use any information they give the FSA appropriately**, including 58% that strongly agree; 88% agree that **they trust the FSA to do a good job**, including 51% that strongly agree.

Only slightly fewer respondents agree that **the FSA is working hard to improve the food industry for all of us** (86%, including 52% that strongly agree), while four-fifths agree that **the FSA is good at identifying where poor standards exist**; **that the FSA is highly effective at regulating the food industry** and **that the FSA would be a good organisation to work with.**

Figure 21: Extent to which respondents agree or disagree with statements about the FSA and what it does (where aware of FSA)



Unweighted sample base = 513

C15. 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.

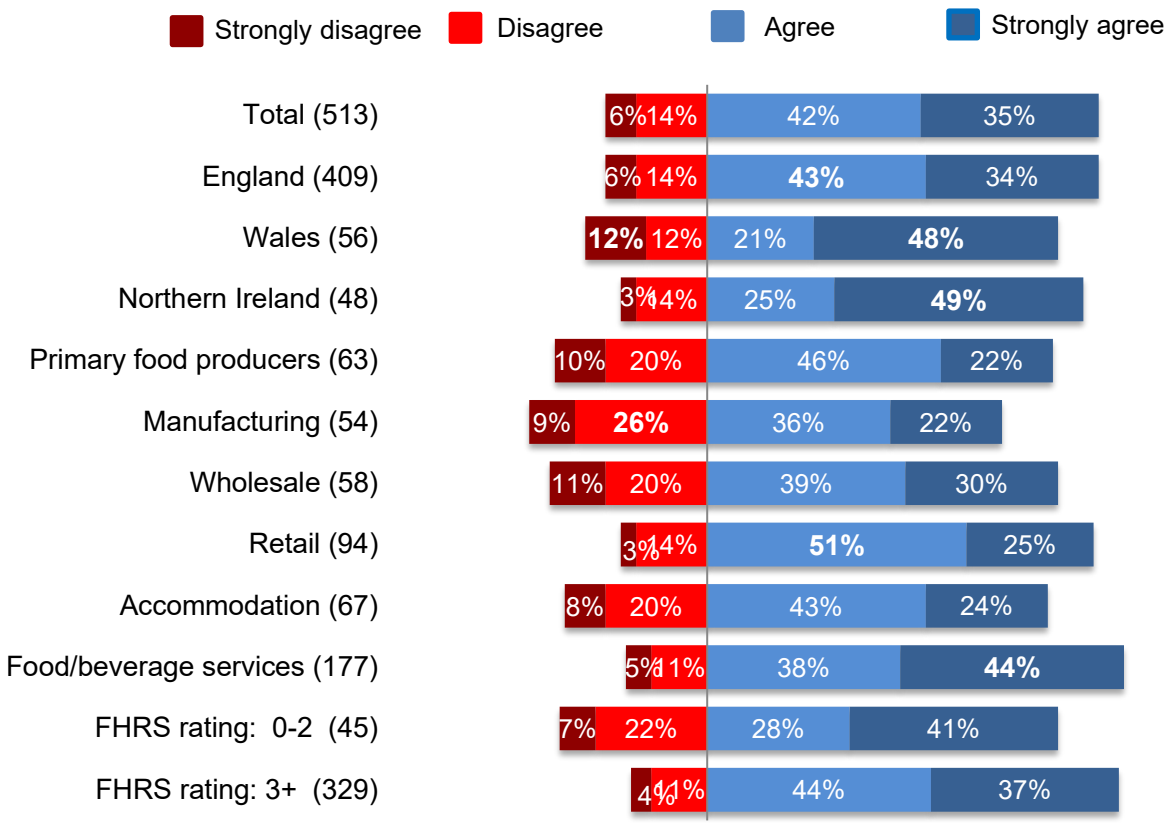
4.11 The FSA's work is very high profile

More than three-quarters of respondents that are aware of the FSA (77%) agree with the statement that the FSA's work is very high profile. A third (35%) strongly agrees.

Respondents within businesses in the food/beverage services sector are significantly more likely to agree with this statement (81%) and 44% of respondents in these businesses strongly agree that the FSA's work is very high profile.

One in five respondents (20%) disagree that the FSA's work is very high profile. This proportion increases to one in three respondents within primary food production (30%), manufacturing (35%) and wholesale (31%) sectors. A relatively high proportion of respondents within businesses with an FHRS rating for below 3 disagree (29%).

Figure 22: Extent to which respondents agree or disagree that the FSA's work is very high profile (where aware of FSA)



Unweighted sample bases in parentheses

C15. 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.

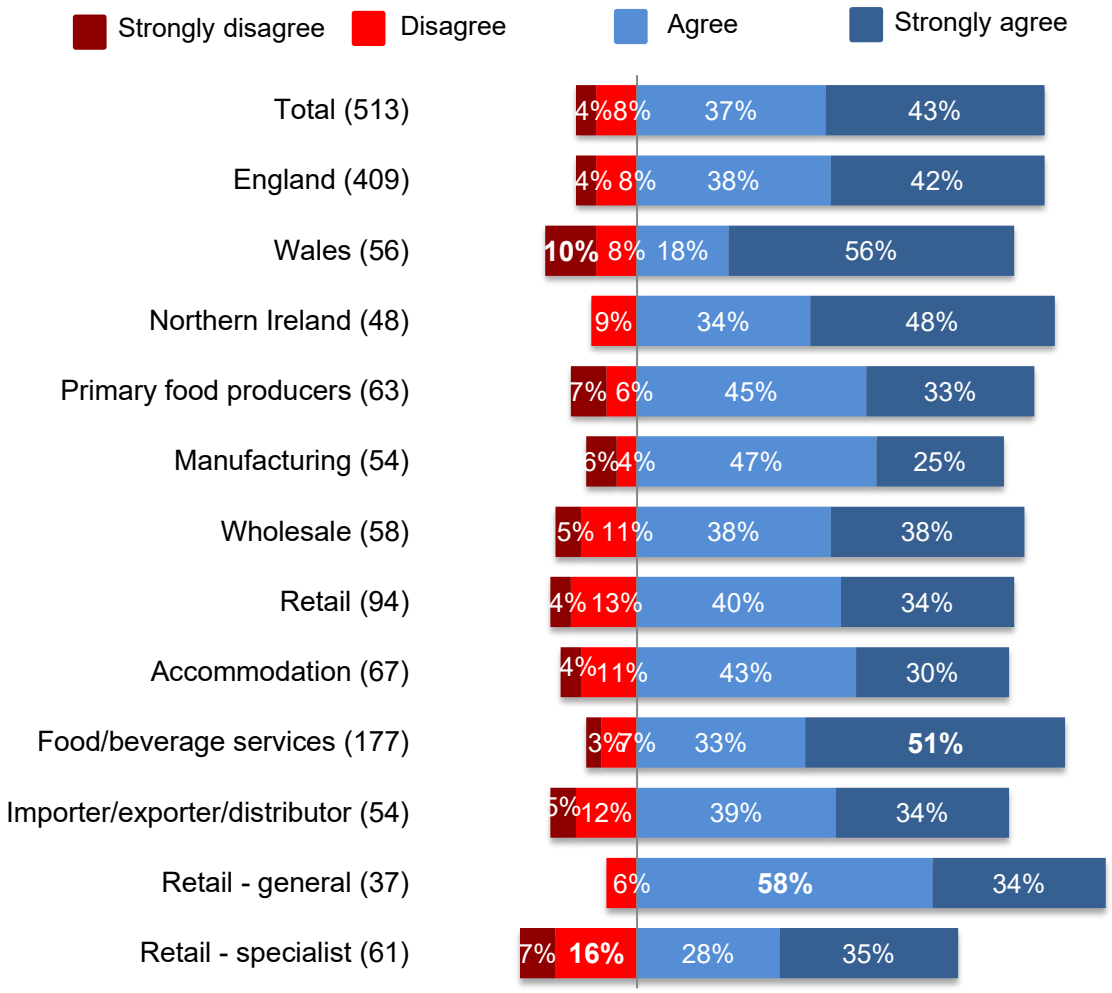
4.12 The FSA is good at identifying where poor standards exist

Four-fifths of respondents that are aware of the FSA (80%) agree with the statement that the FSA is good at identifying where poor standards exist. More than two-fifths (43%) strongly agrees.

Respondents within businesses in the food/beverage services sector are significantly more likely to agree with this statement (84%), including 51% that strongly agree.

One in eight respondents (12%) disagree that the FSA is good at identifying where poor standards exist. This proportion increases to nearly a quarter of respondents in specialist retail businesses (23%).

Figure 23: 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

C15. 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.

4.13 The FSA understands the needs of small food businesses

Two-thirds of respondents that are aware of the FSA (69%) agree with the statement that the FSA understands the needs of small food businesses. Three in ten (29%) strongly agrees.

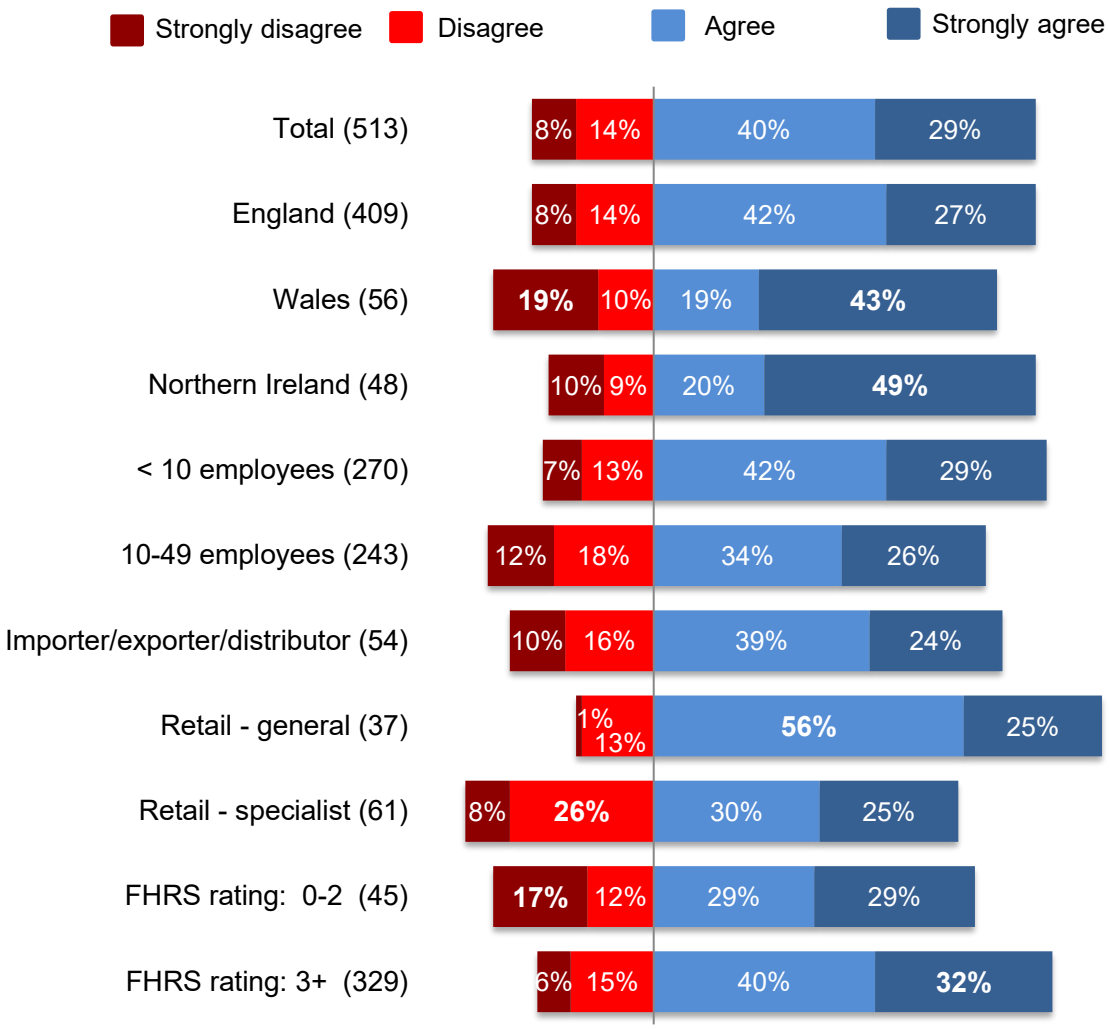
Respondents within Wales and Northern Ireland are significantly more likely than respondents in England to strongly agree that the FSA understands the needs of small food businesses (43% and 49%, compared with 27%). However, respondents in Wales are also significantly more likely than those elsewhere to strongly disagree that this is the case (19%).

Although all businesses surveyed are micro and small businesses, micro businesses (less than 10 employees) are significantly more likely to agree with this statement than small businesses (10-49 employees) (71%, compared with 60%). The level of disagreement is highest among respondents within businesses employing between 10 and 24 employees (32% disagree, including 13% that strongly disagree).

Specialist retailers are significantly more likely than average to disagree that the FSA understands the needs of small food businesses (35%).

There are more positive views amongst respondents in higher FHRS rated businesses, with 72% of those with an FHRS rating of 3+ agreeing, compared with 58% of businesses rated at below 3.

Figure 24: 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

C15. 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.

4.14 The FSA is highly effective at regulating the food industry

Four-fifths of respondents that are aware of the FSA (80%) agree with the statement that the FSA is highly effective at regulating the food industry. Two-fifths (40%) strongly agree.

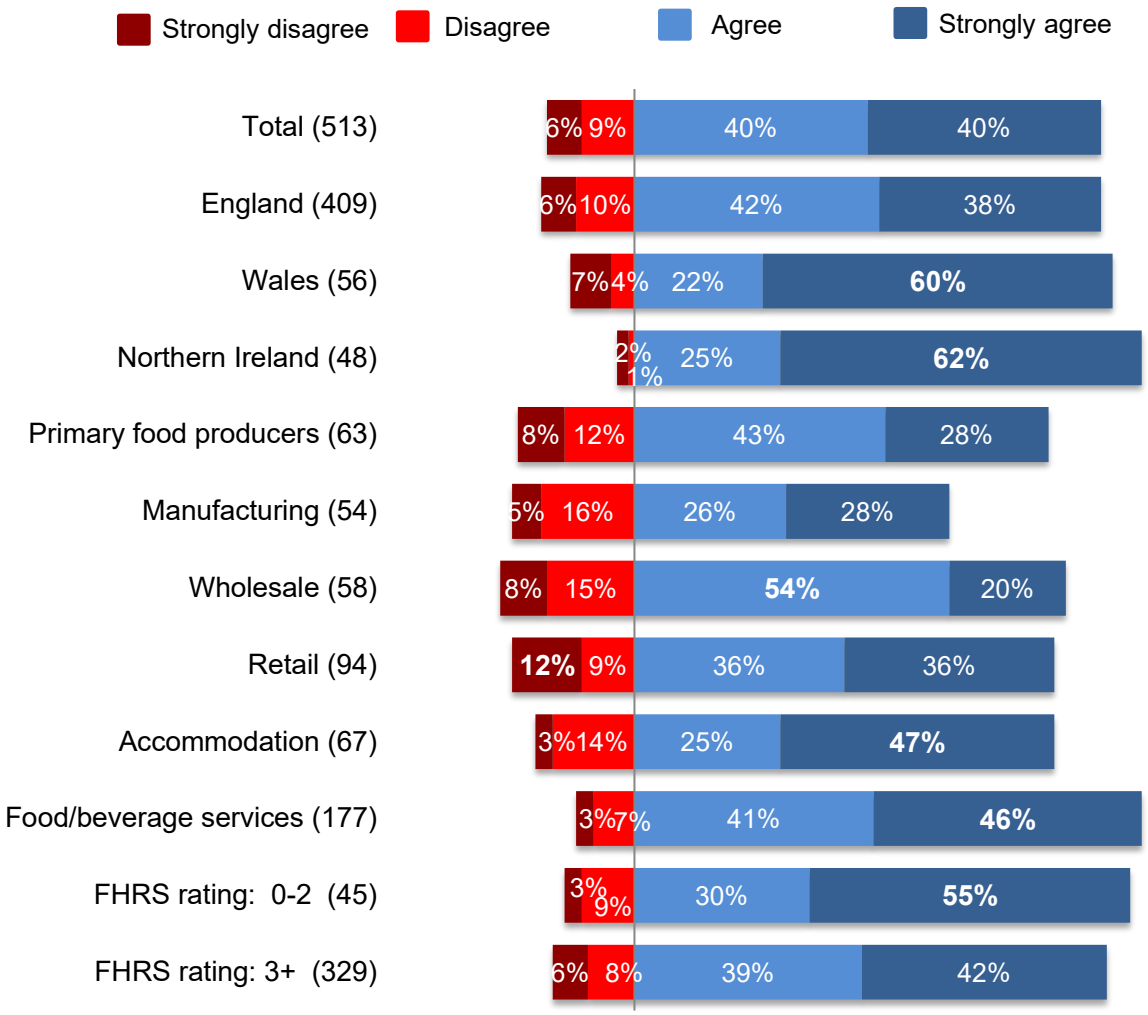
Respondents within Wales and Northern Ireland are significantly more likely than respondents in England to strongly agree that the FSA is highly effective at regulating the food industry (60% and 62%, compared with 38%). While the proportions that agree across the three nations are at similar levels (Wales; 82%; Northern Ireland; 87% and England; 80%), the difference between businesses in England and those in Wales and Northern Ireland is further underlined by the extent to which businesses in England disagree compared with those in Wales and Northern Ireland (16%, compared with 11% and 3% respectively). Respondents are significantly less positive about the FSA in England with regard to its effectiveness.

Respondents within food/beverage services businesses are significantly more likely to agree with this statement than average (86%), with manufacturers least likely to (54%). However, the lower level of agreement amongst manufacturers is a result of a higher level of uncertainty in how to rate the FSA in this respect. A quarter of manufacturers are not sure if they agree or disagree (25%).

Nearly half of respondents within accommodation and food/beverage services businesses (47% and 46% respectively) strongly agree that the FSA is highly effective at regulating the food industry. This view is also particularly likely to be held by respondents within businesses that have a low FHRS rating (55% of those rated 0-2).

One in seven respondents that are aware of the FSA (15%) disagree that the FSA is highly effective in this respect.

Figure 25: Extent to which respondents agree or disagree that the FSA is highly effective at regulating the food industry (where aware of FSA)



Unweighted sample bases in parentheses

C15. 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.

4.15 The FSA would be a good organisation to work with

Four-fifths of respondents that are aware of the FSA (80%) agree with the statement that the FSA would be a good organisation to work with. Nearly half (46%) strongly agree.

Again, respondents within Wales and Northern Ireland are significantly more likely than respondents in England to strongly agree that the FSA would be a good organisation to work with (60% and 63%, compared with 44%). The proportion is highest amongst respondents within micro businesses (49% of those where there are less than 10 employees).

Also, again, respondents within food/beverage services businesses are significantly more likely to agree with this statement than average (86%), with manufacturers least likely to (60%) and similarly to the findings with regard to the effectiveness of the FSA in

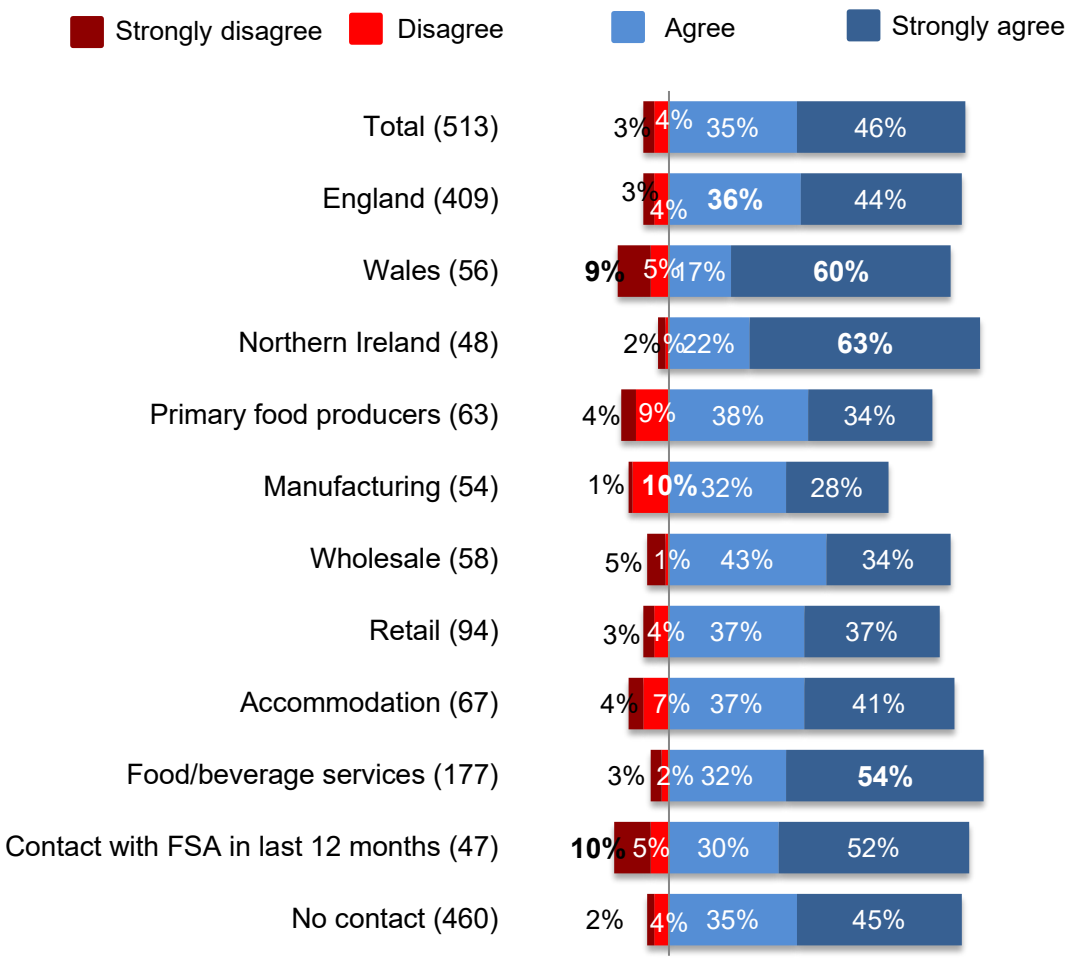
regulating the food industry, there is a higher level of uncertainty amongst manufacturers in how to rate the FSA as an organisation to work with (29% are not sure).

More than half of respondents within food/beverage services businesses (54%) strongly agree that the FSA would be a good organisation to work with.

Taking into account recent contact with the FSA and therefore direct experience of the FSA as a an organisation, those that have had contact with the FSA in the last 12 months are more likely than those that have not had recent contact with the FSA to strongly agree that it would be a good organisation to work with (52%, compared with 45%), but also more likely to strongly disagree (10%, compared with 2%).

Overall, just 7% of respondents disagree that the FSA would be good organisation to work with. This proportion is significantly higher than average within primary food production (14%).

Figure 26: 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

C15. 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.

4.16 The FSA is working hard to improve the food industry for all of us

More than four-fifths of respondents that are aware of the FSA (86%) agree with the statement that the FSA is working hard to improve the food industry for all of us. More than half (52%) strongly agree.

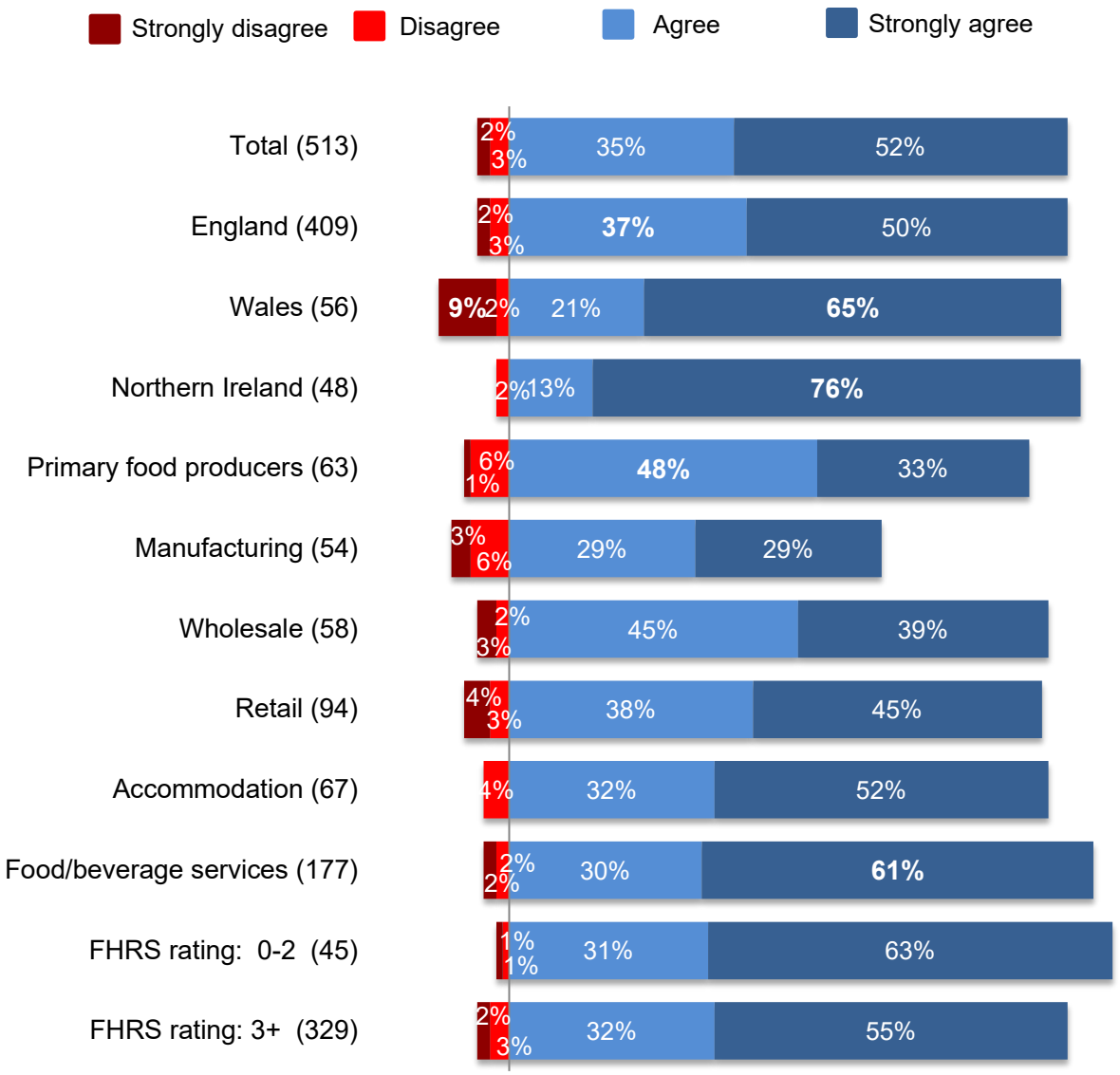
The proportion that strongly agrees with this statement is particularly high within Northern Ireland (76%) and also higher in Wales than in England (65%, compared with 50%).

Micro businesses are significantly more likely than small businesses to strongly agree that the FSA is working hard to improve the food industry for everyone (54% of those where there are less than 10 employees, compared with 43% of those with more than 10 employees).

Respondents within food/beverage services businesses are significantly more likely to agree with this statement than average (91%), with manufacturers least likely to (58%). Again, more uncertainty with regard to this aspect of the FSA's performance is behind the lower level of agreement amongst manufacturers. A third of manufacturers do not know (33%).

The level of agreement with this statement is high across differently FHRS rated businesses. The vast majority of poor performing businesses (93% of those rated at 0-2) agree that the FSA is working hard to improve the food industry.

Figure 27: Extent to which respondents agree or disagree that the FSA is working hard to improve the food industry for all of us (where aware of FSA)



Unweighted sample bases in parentheses

C15. 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.

4.17 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 do a good job and to use any information they provide to the FSA appropriately.

4.17.1 Trusting the FSA to do a good job

The vast majority of respondents aware of the FSA (88%) agree that they trust the FSA to do a good job. This includes 51% that strongly agree.

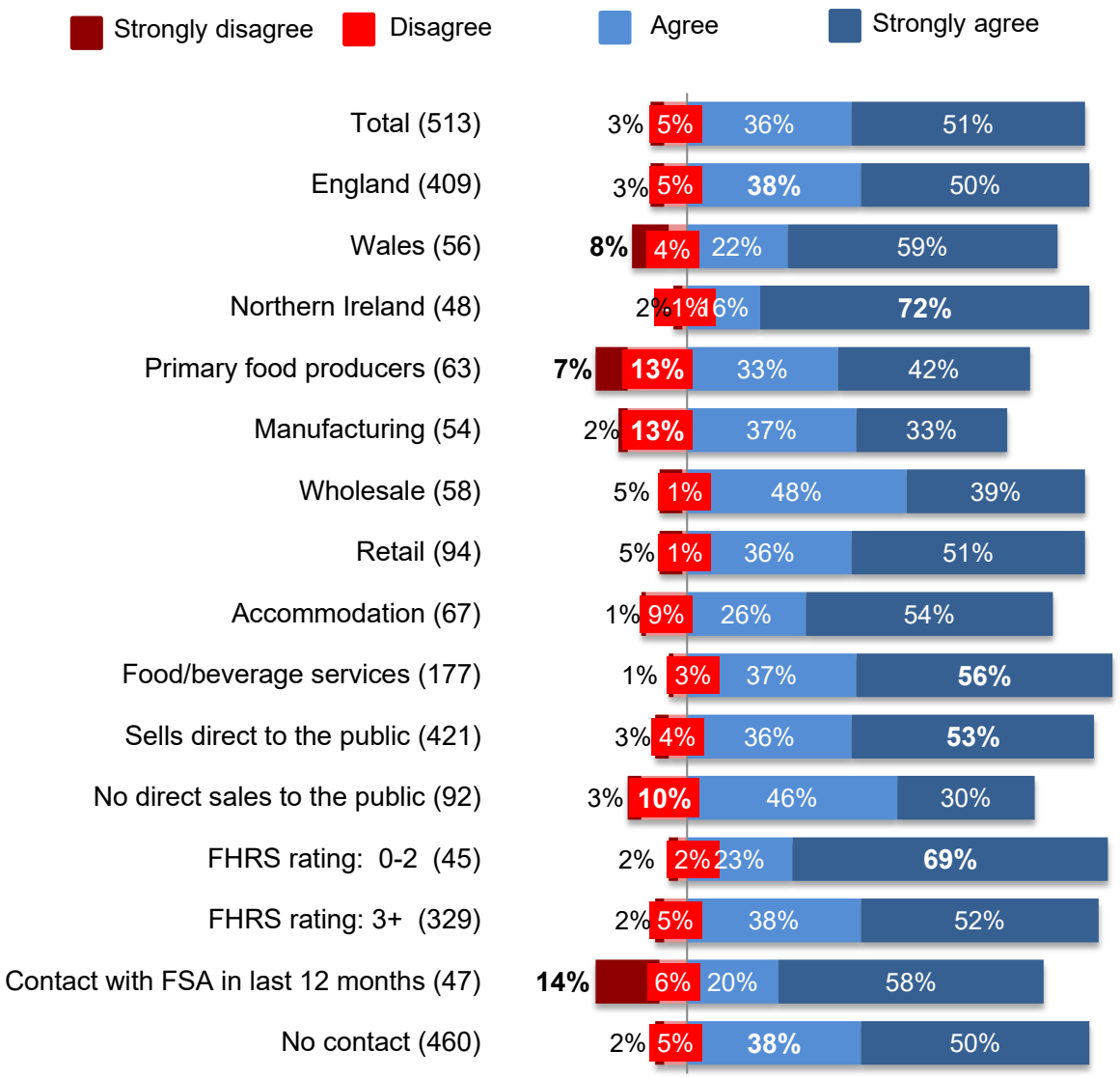
Those that agree make up a higher proportion of respondents in England and Northern Ireland than in Wales (88% for both, compared with 81%) and 72% of respondents in Northern Ireland strongly agree that they trust the FSA to do a good job.

Respondents within food/beverage services businesses are significantly more likely than average to trust the FSA to do a good job (93%) and this is reflected in the extent to which respondents in consumer-facing businesses agree that they do (89%). In both cases more than half of respondents strongly agree (56% within food/beverage services and 53% within businesses that directly serve the public).

There is a high degree of trust across businesses at all levels of FHRS rating, with 69% of respondents in businesses that have low FHRS rating of 0-2 strongly agreeing that they trust the FSA to do a good job. This compares with half of those with an FHRS rating of 3+ (52%).

Overall, just 8% of respondents aware of the FSA disagree that they trust the FSA to do a good job. This includes 3% that strongly disagree. The proportion that strongly disagrees is higher than average among respondents in businesses that are awaiting an FHRS rating (8%) and this is also reflected in the proportion that strongly disagree amongst those that have had contact with the FSA in the last 12 months (14%).

Figure 28: Extent to which respondents agree or disagree that they trust the FSA to do a good job (where aware of FSA)



Unweighted sample bases in parentheses

C15. 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.

4.17.2 Trusting the FSA to use information appropriately

Nine in ten of respondents (90%) agree that they trust the FSA to use any information they are given appropriately. This includes 58% that strongly agree.

Those that agree make up a higher proportion of respondents in England and Northern Ireland than in Wales (90% and 87% respectively, compared with 82%) and 77% of respondents in Northern Ireland strongly agree that they trust the FSA to use information appropriately.

Respondents within food/beverage services businesses are significantly more likely than average to trust the FSA to use their information appropriately (95%) and this is reflected in the extent to which respondents in businesses that sell direct to the public agree that they do (91%), compared with those that do not (74%). In both cases around three-fifths

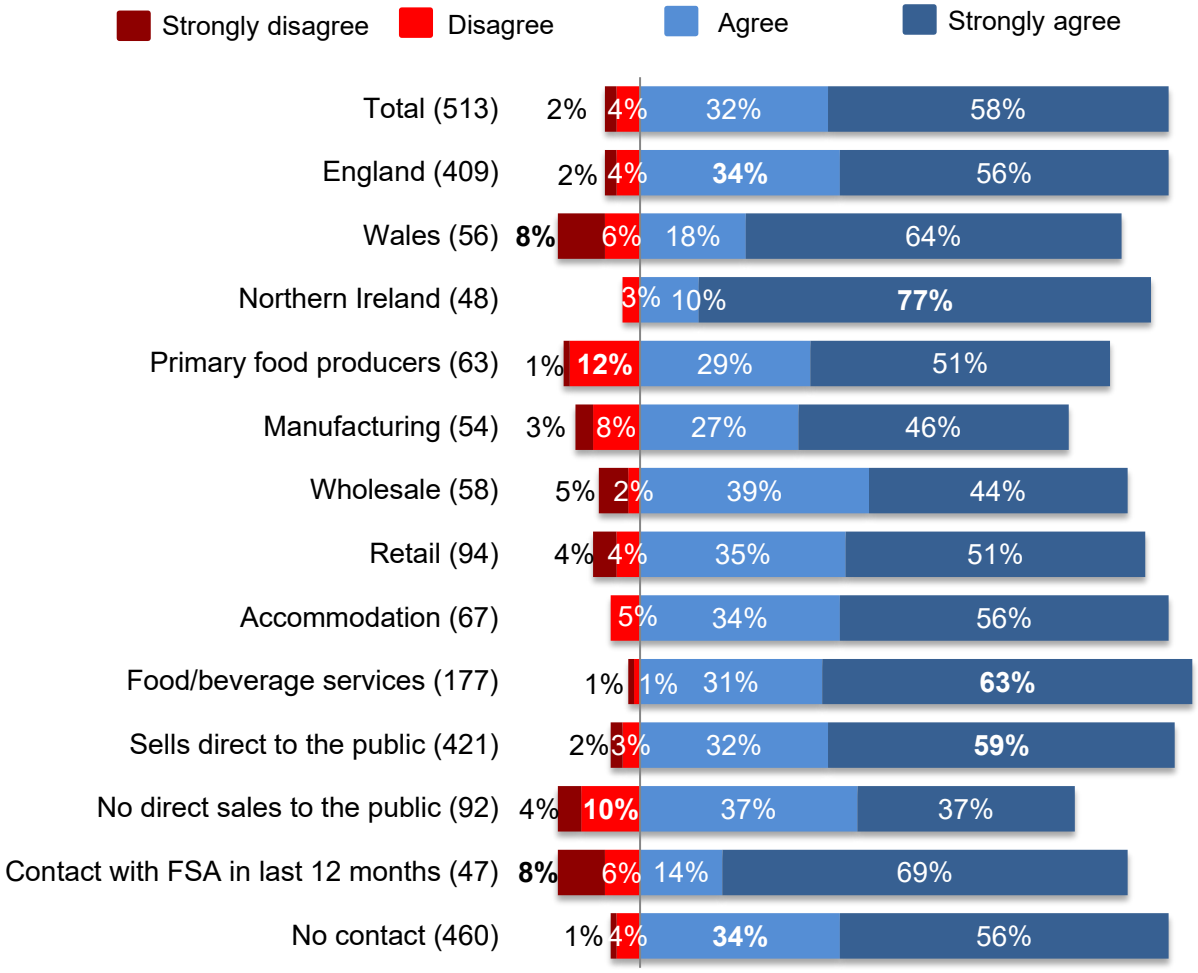
of respondents strongly agree (63% within food/beverage services and 59% within businesses that directly serve the public).

There is a high degree of trust across businesses at all levels of FHRS rating, with 68% of respondents in businesses that have low FHRS rating of 0-2 and 59% of those with an FHRS rating of 3+ strongly agreeing that they trust the FSA to use information appropriately.

Respondents within businesses that have IT systems are significantly more likely than those that do not to trust the FSA to use information appropriately (92%, compared with 84%). There was no difference between the views of the two groups with regard to trusting the FSA to use information appropriately.

Overall, just 6% of respondents aware of the FSA disagree that they trust the FSA to use information appropriately. Only 2% strongly disagree. The proportion that strongly disagrees is higher than average among respondents in Wales (8%) and amongst those that have had contact with the FSA in the last 12 months (8%).

Figure 29: 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

C15. 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.

4.18 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 foods businesses in England, Wales and Northern Ireland.

Reflecting the fact that this survey is the first wave of an on-going tracking survey, this is the first attempt at creating a composite score and that further iterations may be needed, as well as further research into the area, to explore trust in the FSA among businesses.

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 food businesses;
- 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 improve the food industry for all of us;
- 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 half the respondents that are aware of the FSA (56%) have overall trust in the FSA; one in five has a high level of trust (20%); one in three has partial trust (31%) and just 2% have no 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 20% of all respondents that are aware of the FSA that have a high level of trust in it, respondents in Wales and Northern Ireland are significantly more likely to hold this level of trust in the FSA (37% and 36% respectively).

High trust is more prevalent amongst micro than small businesses (22% of respondents in businesses with less than 10 employees, compared with 13% of those within businesses with 10-49 employees). Respondents in single site businesses are significantly more likely than those in businesses with more than one site to have a high level of trust in the FSA (20%, compared with 4%).

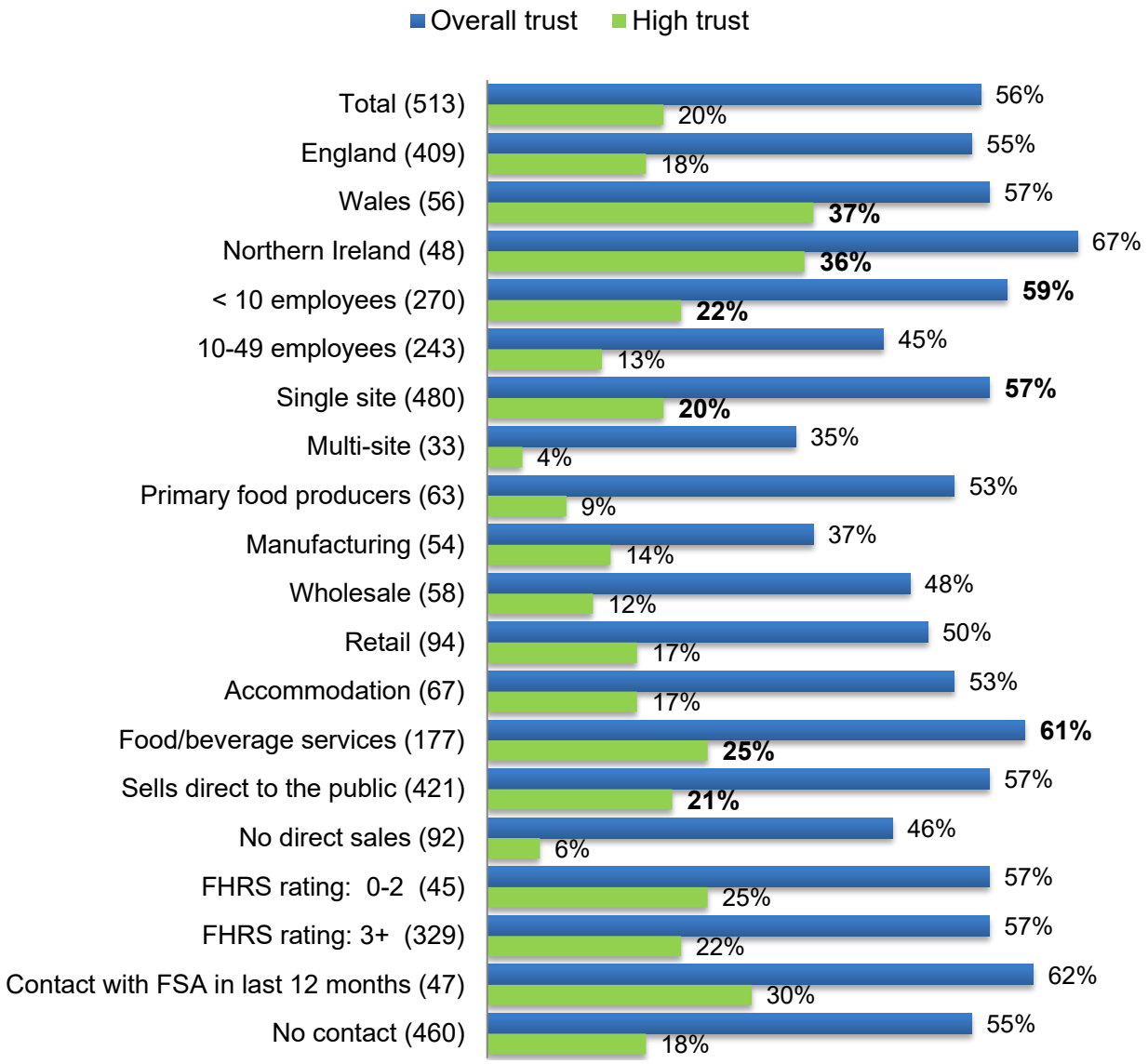
By sector, respondents in food/beverage services businesses are significantly more likely than those in other sectors to have high trust in the FSA (25%) and those within primary food production least likely to fall into this group (9%) and significantly more likely than average to be in the 'no trust' group (7%).

Respondents within businesses that sell directly to the public are three times more likely than those in businesses that do not to have high trust in the FSA (21%, compared with 6%).

There is little difference in the views of respondents by where their business stands on the FHRS rating scale.

Despite observations on one or two of the individual statements centring on the contact that respondents have recently had with the FSA reflecting more negative views amongst those that have had recent contact, there is a higher level of trust amongst those that have had recent contact with the FSA than those that have not (30%, compared with 18% in the high trust group[14]). One proviso of this is that amongst respondents in businesses where there is no FHRS rating or a rating is awaited, only 7% have high trust in the FSA.

Figure 30: Trust indicator: Proportions of respondents in the 'overall trust' and 'high trust' groups (where aware of FSA)



Unweighted sample bases in parentheses

C15. 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.

[14] This is not statistically significant due to the low sample base for those that have had contact with FSA over the last 12 months

5 Experiences of processes/interventions

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

Experiences of processes/interventions - key findings
While more than three-fifths of respondents report that their business had a food hygiene inspection in the last 12 months, very few reported other processes or interventions around food safety issues.
Three-fifths of respondents report that their business has written procedures in place to guide them through a product recall or withdrawal. This is more likely to be lacking in poor performing businesses (those with an FHRS rating of less than 3).

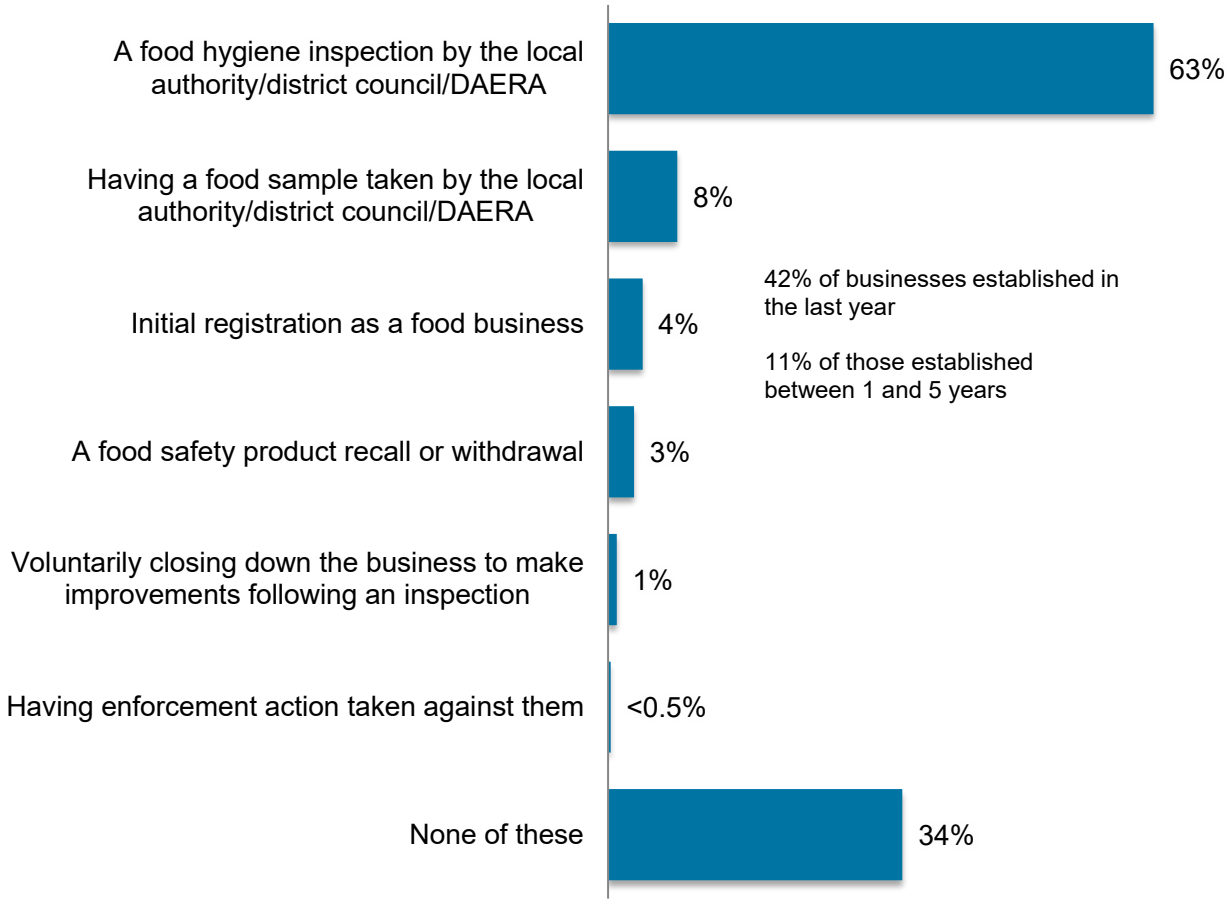
5.1 Processes and interventions experienced

More than three in five respondents report that their business has had a food hygiene inspection in the last 12 months (63%). This will have been carried out by the local authority or district council or, in the case of businesses in Northern Ireland, the DAERA[15].

Other processes and interventions have been experienced by fewer than one in ten respondents, with the most common being having a food sample taken by the local authority or district council or DAERA (8%).

[15] DAERA: Department of Agriculture, Environment and Rural Affairs

Figure 31: Processes and interventions that businesses have experienced or been involved in within the last 12 months – prompted, multiple response (all respondents)



Unweighted sample base = 530

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

While only 4% of all respondents say their business has undergone initial registration as a food business in the last year, these are, of course, more likely to be newly established businesses and the proportion increases to 42% of businesses established in the last 12 months (caution advised here as this is a very low sample base). However, a significant number of businesses undergoing initial registration were established more than a year ago but in the last five years (11% of businesses established 1 to 5 years ago).

Very few businesses have experienced a food safety product recall or withdrawal in the last 12 months (3%), while even fewer have voluntarily closed down to make improvements following an inspection (1%) and/or have had enforcement action taken against them (less than 1%).

Respondents in Northern Ireland are significantly more likely than average to have had a food sample taken (21%), while those in Wales are significantly more likely than average to have voluntarily closed down to make improvements following an inspection (14%).

Seven in ten food/beverage services businesses (71%) have had a food hygiene inspection in the last 12 months, compared with around half of businesses in other sectors.

A third of respondents (34%) reported that their businesses have not experienced any of these processes or interventions in the last 12 months.

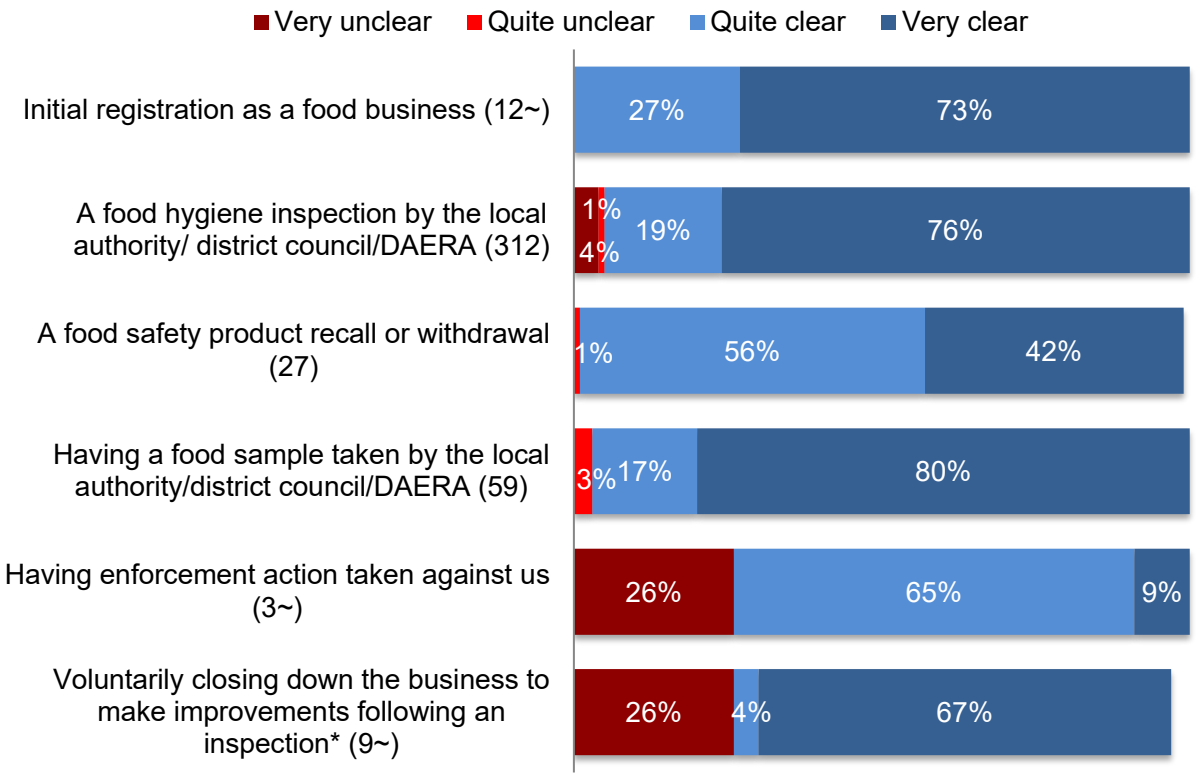
5.2 Clarity of communications

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.

There was less perceived clarity with regard to food safety product recall or withdrawal and having enforcement action taken against them. In both of these cases the numbers of responses on which this assessment is based were very small.

The findings suggest that more clarity may be needed with regard to enforcement action and the need to close a business down to make improvements. A quarter of respondents with recent experience in these areas have found the communications very unclear (26% in each case), although the number reporting on this is small.

Figure 32: 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 *3% don't know

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

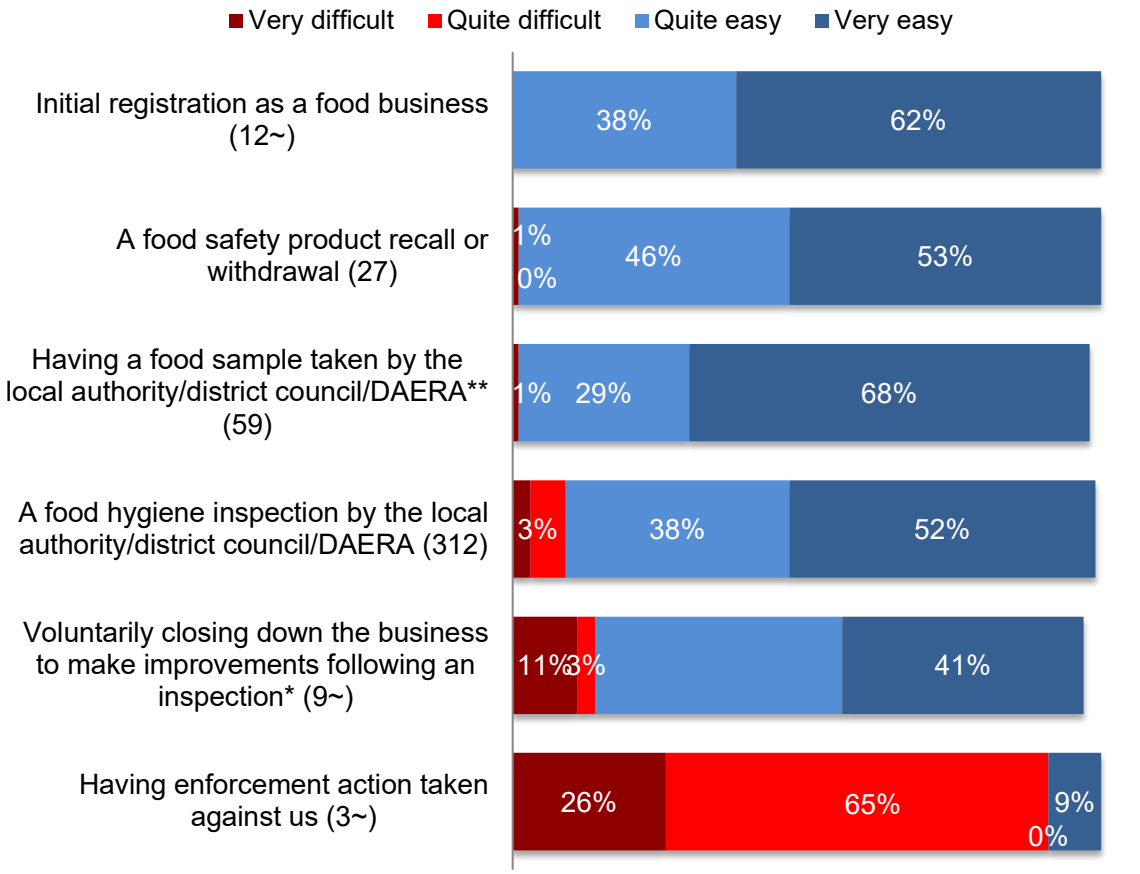
5.3 Ease of completion of processes and interventions

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 having enforcement action taken against them, the vast majority of respondents had found it easy to complete the process. Nearly all those having enforcement action taken against them had found it difficult (91%).

Respondents are more likely to have found completion of processes and interventions very easy than quite easy; the ratio being generally 5:4 in favour of it being very easy.

Figure 33: 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

*4% don't know **2% don't know

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

5.4 Food product recall or withdrawal

The 3% of respondents that have experienced a food product recall or withdrawal in the last 12 months were asked about the experience.

More than half of those that had experienced a food product recall or withdrawal (57%) returned the product to the supplier, while two-fifths (41%) took the product off the shelf/withdrew the product from sale. In a minority of cases (9%) the product was disposed of.

Specific experiences are reported as follows:

> *"I got an email to withdraw, so I took it off the shelf and binned it, lost money. Usually with American products."*
>
> *"4 months ago we received a phone call and took the product off the shelf as instructed by FSA."*
>
> *"Disposed of cheese; supplier let me know and called by the local authority."*
>
> *"We were informed and returned product to the company we bought it from."*
>
> *"Were notified by the supplier. Withdraw from sale and returned items to the supplier and product was destroyed."*
>
> *"Suppliers emailed us about the product withdrawal. I just took the product off the shelves and sent in back."*
>
> *"Just had labelling issues. We were told by our local council and we re-labelled them."*
>
> *"Went to consultant for advice. We told the relevant effected customers; we separated it and labelled it as on hold."*
>
> *"They came through a regular inspection, they took a sample. Everything was cleared and returned to normal."*
>
> *"The wholesaler recalled it, and gave the badge numbers and use by dates that had to be recalled."*
>
> *"We disposed of the product, we withdraw it from the shop, there was no real advice on what to do. It was a tiny pot of glitter - it had no harm or effect unless it was in a large quantity; it was withdrawn because it was from another country, the manufacturer wouldn't comply with the UK regulations and they found small traces in the product."*
>
> *"Happened in April/May 2018. They came in and found a mint chocolate that didn't meet the standard of the product. The local authority took sample of the product."*

5.5 Written procedures on product recalls and withdrawals

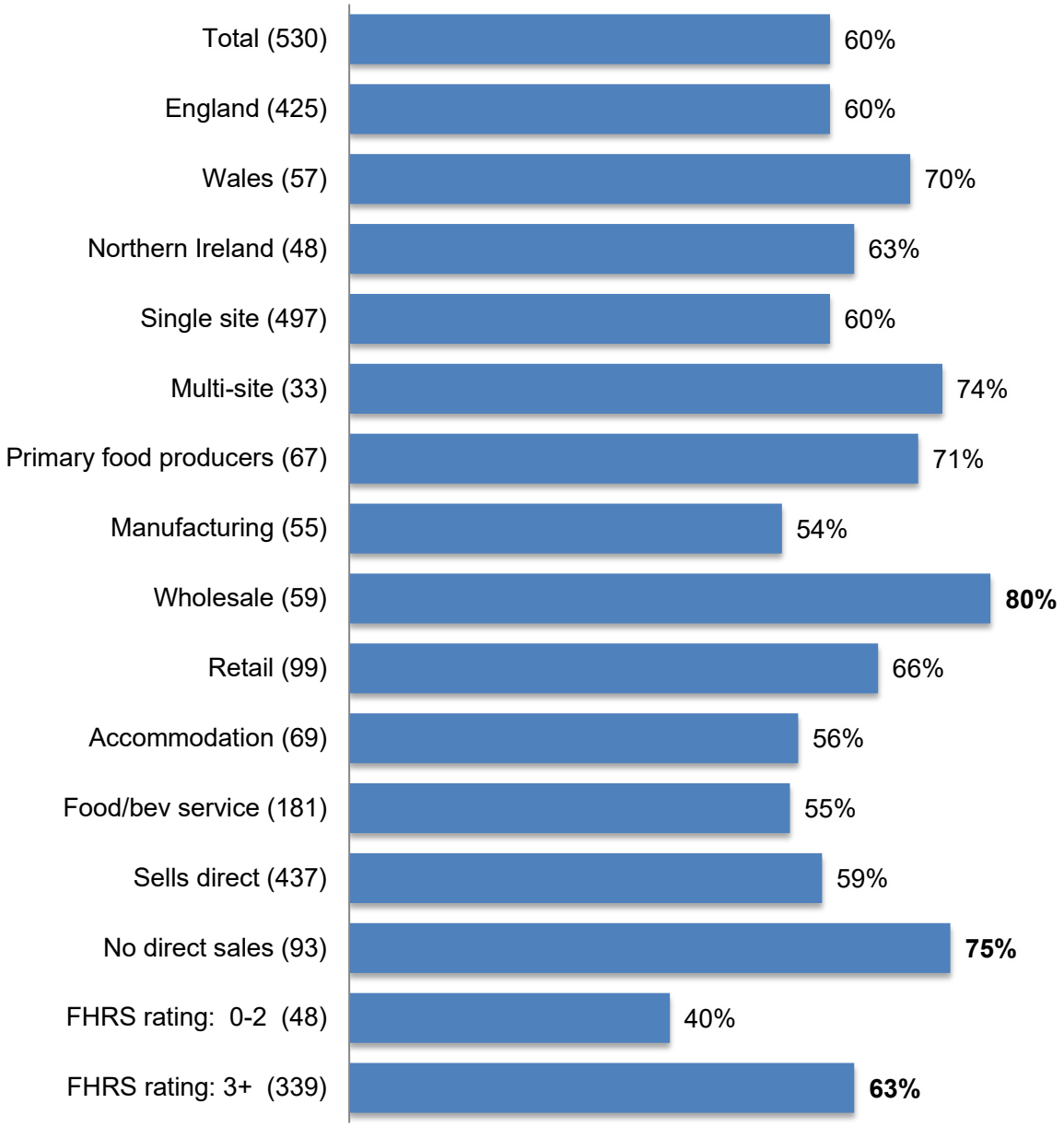
Three in five respondents (60%) report that their business has written procedures in place to guide them on how to deal with product recall or withdrawal.

The propensity to have these procedures written down varies across businesses of different sizes but is higher within businesses that have more than one site (74%, compared with 60% of single site businesses).

It is more common than average within wholesale businesses (80%) and where there are no direct sales to the public (75%). Businesses with a low FHRS rating (0-2) are

significantly less likely than average to have written procedures in place to help them deal with product recall or withdrawal (40%).

Figure 34: Proportion of businesses 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?

6 Information and communication

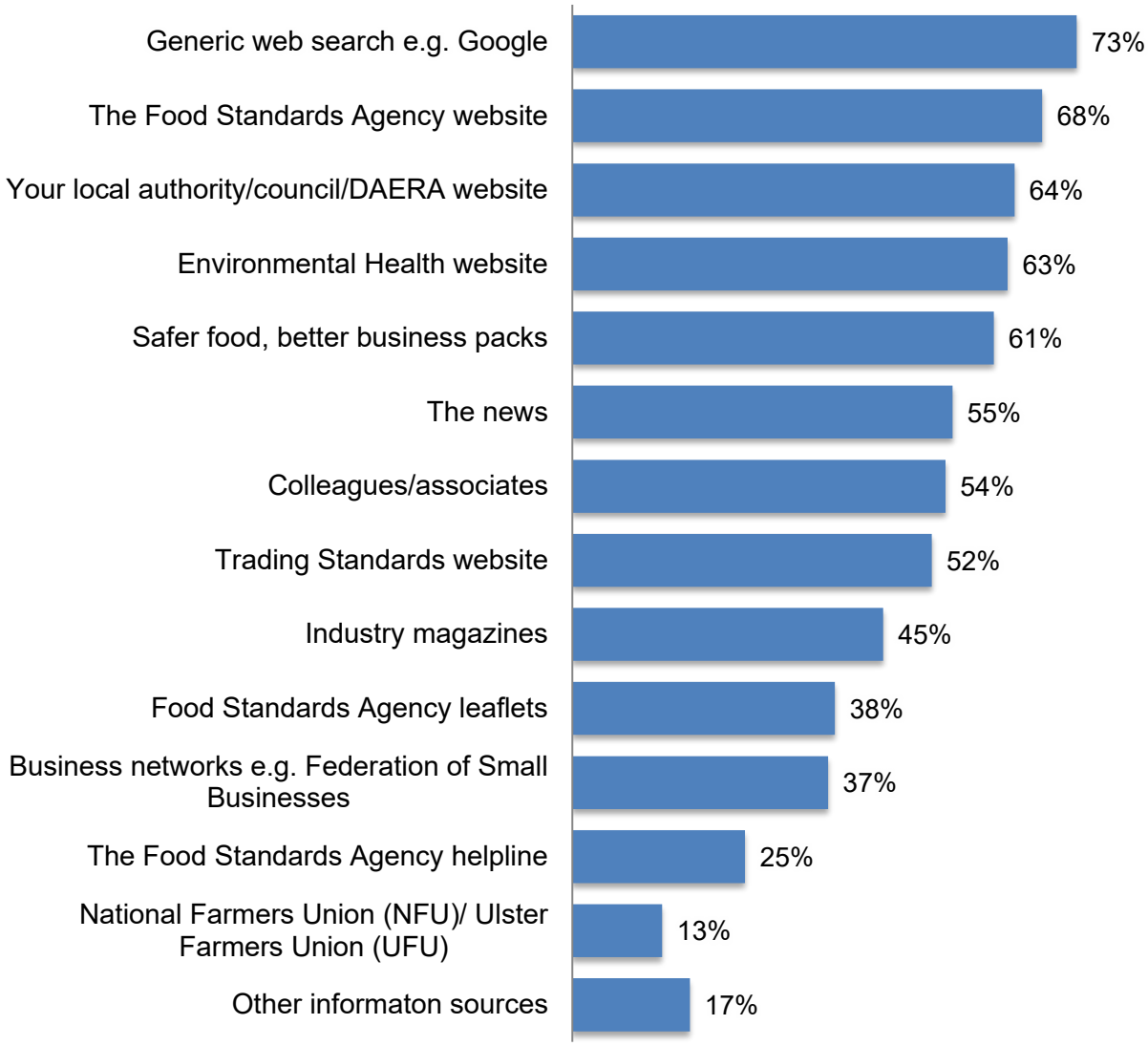
This chapter summarises businesses' preferences with regard to information and communication on food safety and hygiene.

Information and communication - key findings
Despite a low level of contact with the FSA, the FSA website is a popular source of information about food safety guidelines and regulations, food allergies and product recalls (68%, compared with 73% that mentioned a generic web search).
Email alerts are the preferred way of receiving updates regarding food regulations but take up of the FSA news and alerts service is currently low (at 13% of those aware of the FSA).
Awareness of the National Food Crime Unit is at a low level (18%).

6.1 Sources of information

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 = 530

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...?

Google or similar (i.e. a web search) is the most frequently used source of information about food safety guidelines and regulations, food allergies and product recalls (73%), followed by the Food Standards Agency website (68%) and their local authority/district council/DAERA[16] (64%).

There is some variation in sources used by nation, with the FSA website and helpline more likely to be used than average by businesses in England (69% and 26% respectively) and the local authority website more frequently used than average in Wales (79%). Respondents in England are also significantly more likely than average to cite google/web search (75%) and/or industry magazines (47%).

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

Food/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 the FSA website (75%); the Environmental Health website (73%); and Safer Food, Better Business packs (72%).

Table 11: Sources of information about food safety guidelines and regulations, food allergies and product recalls, by nation and sector – prompted, multiple response (all respondents)

		Nation			Sector					
	All	England	Wales	Northern Ireland	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services
Generic web search e.g. Google	73%	**75%**	64%	57%	75%	53%	61%	67%	75%	77%
The Food Standards Agency website	68%	**69%**	61%	54%	57%	27%	64%	65%	62%	**75%**
Your local authority/ Your district council/ DAERA website	65%	64%	**79%**	65%	55%	38%	37%	62%	67%	**72%**
Environmental Health website	63%	64%	62%	51%	50%	35%	44%	53%	64%	**73%**
Safer food, better business packs	61%	62%	57%	49%	44%	19%	20%	61%	59%	**72%**
The news	55%	55%	56%	60%	42%	49%	65%	51%	61%	**59%**
Colleagues/ associates	54%	54%	47%	49%	50%	49%	66%	50%	48%	56%
Trading Standards website	52%	53%	53%	29%	53%	36%	48%	48%	46%	54%
Industry magazines	46%	**47%**	27%	27%	43%	**65%**	49%	43%	45%	46%
Food Standards Agency leaflets	38%	36%	**58%**	**52%**	29%	23%	26%	43%	**53%**	40%
Business networks e.g. Federation of Small Businesses	37%	37%	36%	34%	33%	33%	39%	47%	40%	35%
The Food Standards Agency helpline	25%	**26%**	23%	11%	24%	9%	25%	20%	20%	28%
National Farmers Union (NFU)/ Ulster Farmers Union (UFU)	13%	13%	12%	20%	15%	**68%**	19%	10%	13%	11%

	All	Nation			Sector					
		England	Wales	Northern Ireland	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services
Other	14%	14%	15%	7%	20%	20%	**34%**	14%	16%	10%
No, none, nothing	1%	1%	0%	3%	4%	0%	3%	2%	0%	<0.5%
Generic web search e.g. Google	73%	75%	64%	57%	75%	53%	61%	67%	75%	77%
Unweighted bases	*530*	*425*	*57*	*48*	*67*	*55*	*59*	*99*	*69*	*181*

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...?

6.2 Updates on changes to food regulations

Respondents were asked how they would like to be told about changes to food regulations in future.

Email alerts were the most popular (65% of all respondents), followed by leaflets/letters through the post (38%). Email alerts increase in popularity as business size increases (from 63% of respondents within businesses with less than 10 employees, compared with 71% of those with between 10 and 24 employees to 73% of small businesses (with 10-49 employees). This is not reflected in the findings amongst multi-site businesses however, who are less likely to prefer email alerts than single site establishments (57%, compared with 65%).

Micro businesses (with less than 10 employees) are more likely than small businesses (10-49 employees) to prefer leaflets/letters through the post (40%, compared with 22%).

Being informed about changes over the telephone is preferred by 7% of all respondents, while 6% prefer a face to face approach. Telephone is significantly more likely than average to be the preference amongst Welsh respondents (15%).

Having IT systems, websites and social media accounts are key variables in terms of how businesses prefer to receive information. Leaflets/letters through the post are significantly more likely to be preferred by respondents within businesses without these facilities (around half, compared with a third of those that do have access to them), while three-quarters of respondents within businesses with IT systems, websites and social media prefer email alerts, compared with around half of those in businesses without them.

Figure 36: How respondents would like to be told about changes to food regulations in future – unprompted, multiple response (all respondents)

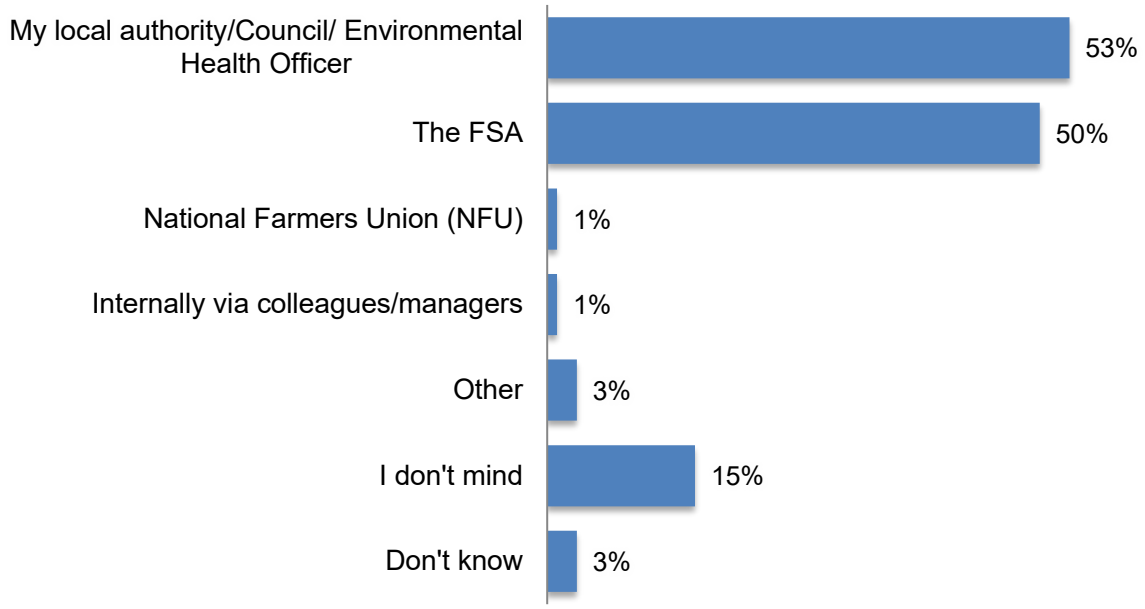
Unweighted sample base = 530

E2. How would you like to be told about any changes to food regulations in future?

Respondents that indicated they were interested in receiving updates (when asked about how they would like to be told about them) were asked who they would like to receive updates about changes to food regulations from.

They were divided between their local authority/council/environmental health officer and the FSA (53% and 50% respectively).

Figure 37: Who respondents would like to hear about changes to food regulations in future from– unprompted, multiple response (where interested in receiving updates)



Unweighted sample base = 508

E3. And who would you like to receive updates about any changes to food regulations from?

The balance between the two broadly shifts between the production and service sectors, with respondents in primary food production more likely to want to receive updates to food regulations from the FSA than from their local authority/council/ environmental health officer (64% and 46% respectively), while those in accommodation and food/beverage services businesses were more likely to choose updates from their local authority/council/environmental health officer (63% and 57% respectively) than the FSA (46% and 47% respectively).

While only one per cent of all respondents interested in receiving updates choose to receive them from the National Farmers Union (NFU), this increases to 14% amongst manufacturers.

Table 12: Preferred sources of updates on changes to food regulations, by sector – unprompted, multiple response (where interested in receiving updates)

	All	Sector					
		Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services
My local authority/Council /Environmental Health Officer	53%	46%	32%	38%	53%	63%	57%
The FSA	50%	**64%**	34%	42%	53%	46%	47%
National Farmers Union (NFU)	1%	3%	**14%**	0%	2%	0%	0%
Internally via colleagues/managers	1%	1%	0%	0%	1%	0%	1%
Other	3%	7%	**15%**	1%	1%	0%	3%
I don't mind	15%	5%	24%	22%	16%	19%	17%
Don't know	3%	3%	3%	**9%**	2%	0%	3%
Unweighted bases	*508*	*63*	*51*	*56*	*94*	*67*	*177*

E3. And who would you like to receive updates about any changes to food regulations from?

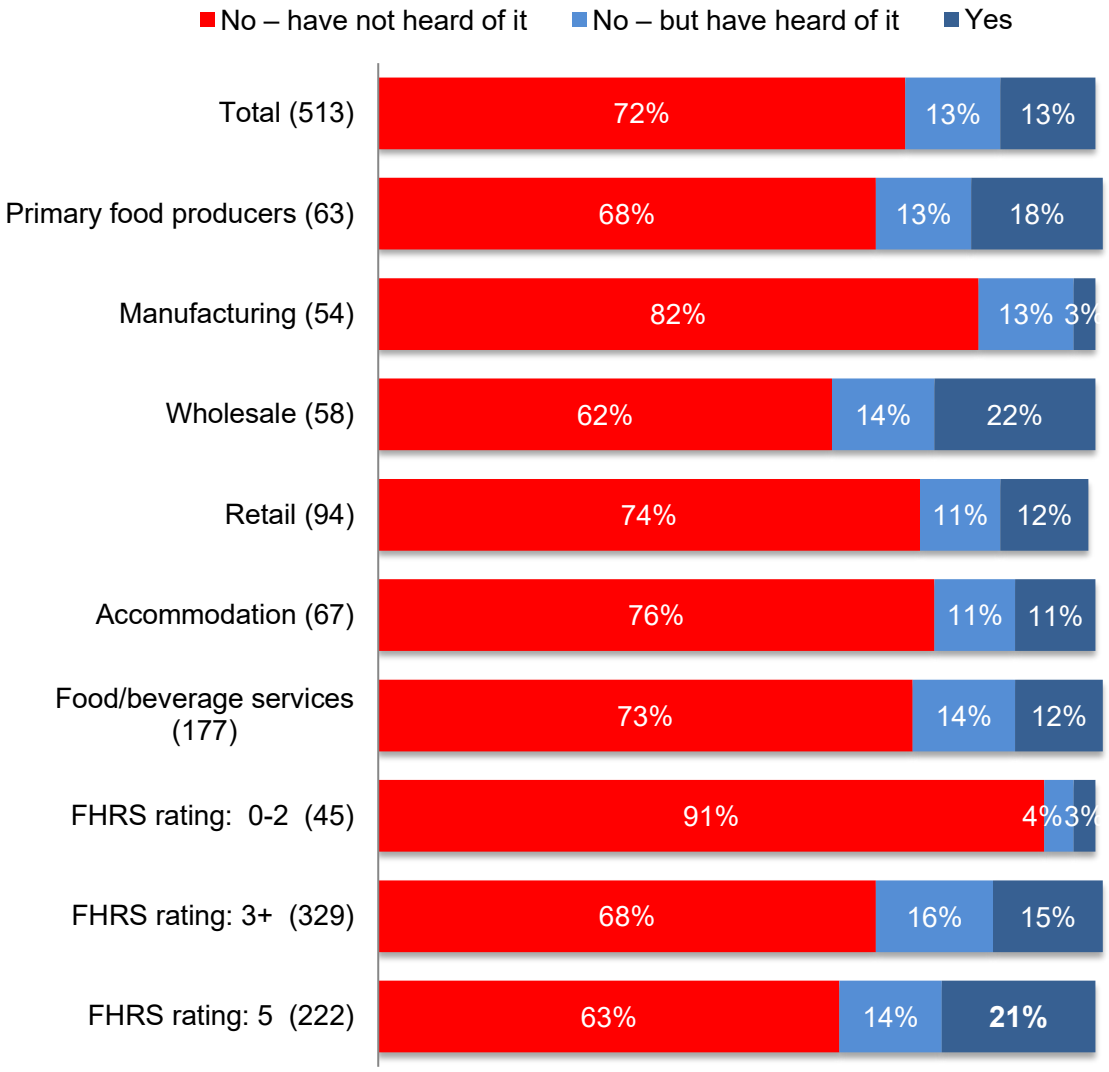
6.3 FSA news and alerts service

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 eight (13%) have heard of the service but not subscribed to it, and the remainder (72%) have not heard of it.

Subscribers are more strongly represented in the wholesale (22%) and primary food production (18%) sectors, while very few manufacturers have subscribed (3%). The proportion of respondents that have subscribed to the service is significantly higher than average amongst importers/exporters/distributors (24%) and amongst respondents whose businesses are FHRS rated at 5 (21%).

Figure 38: Proportion of businesses that have subscribed to the FSA news and alerts service (to receive food and allergy alerts by email or text message) (where aware of FSA)

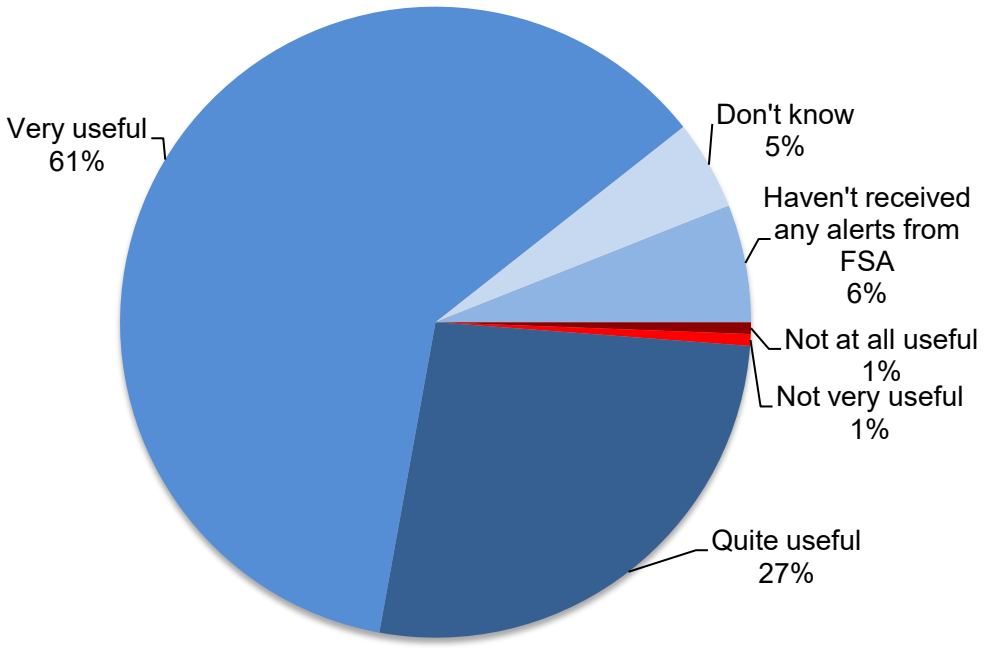


Unweighted sample bases in parentheses

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

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 79% of food/beverage services businesses.

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



Unweighted sample base = 71

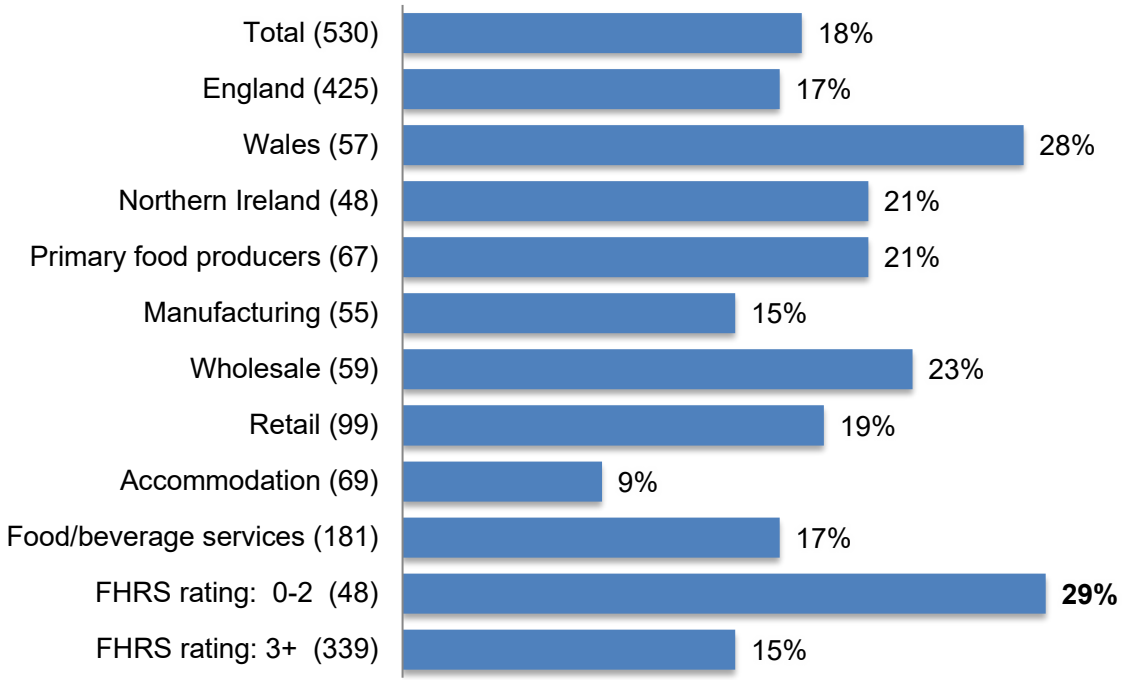
E5. How useful have you found the FSA alerts service?

6.4 National Food Crime Unit

All respondents were asked if they are aware of the National Food Crime Unit. One in six (18%) are. This proportion is higher amongst respondents in Wales (28%) and amongst wholesalers (23%) and businesses where there are no direct sales to the public (27%).

Respondents within businesses with a low FHRS rating of 0-2 are significantly more likely than average to be aware of the National Food Crime Unit (29%).

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?

Just over half of those aware of the National Food Crime Unit (52%) are aware that food crime can be reported anonymously to the National Food Crime Unit.

This proportion is significantly higher than average amongst respondents in businesses with an FHRS rating of 3+ (61%) and compares with just 22% of respondents in businesses with an FHRS rating of below 3.

7 Imports and Exports

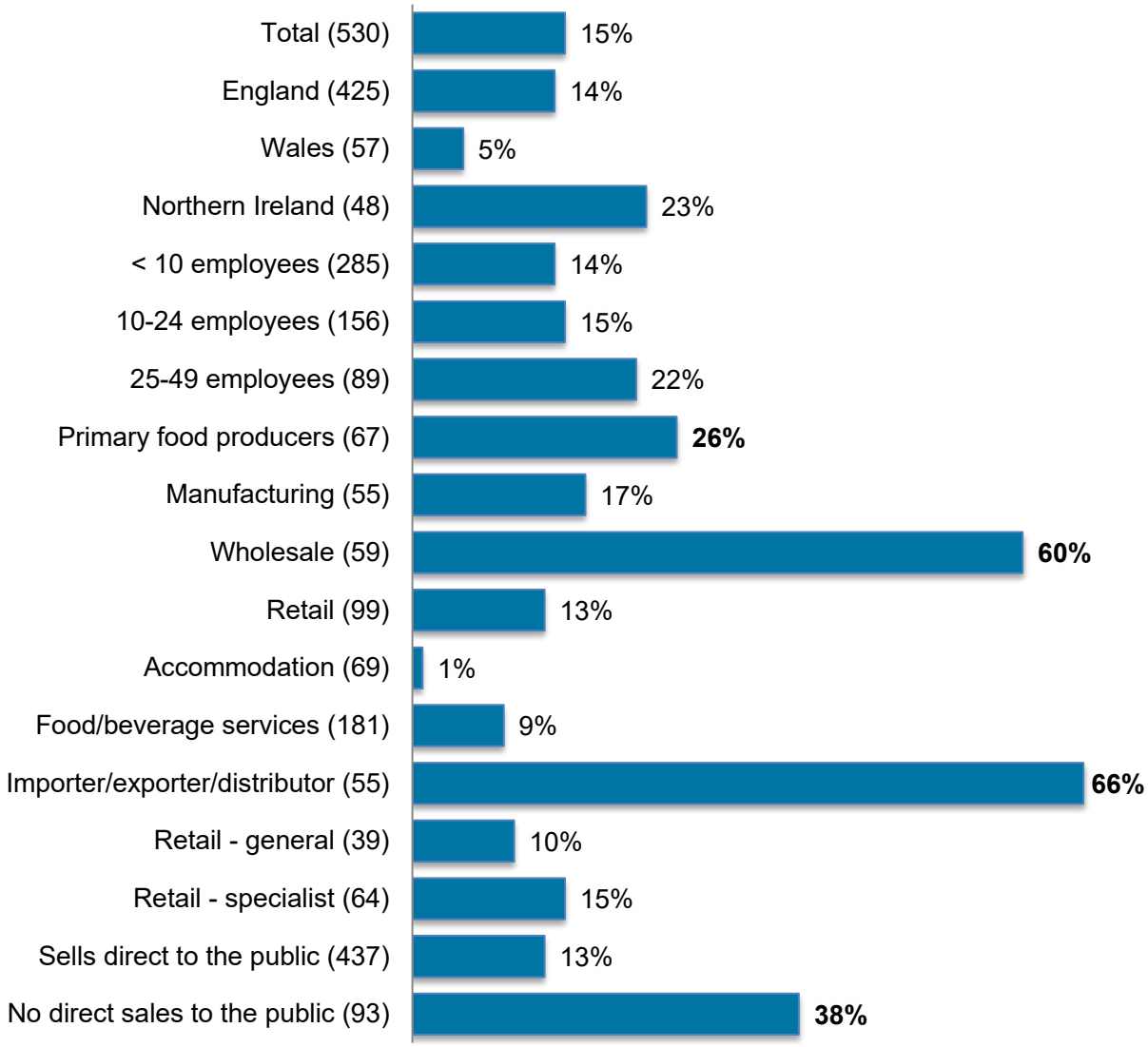
This chapter summarises import and export activity amongst micro and small food businesses.

Imports and exports - key findings
15% of respondents directly imports any goods or services.
Just 3% of respondents exports any goods or services.
The EU/Republic of Ireland is the most significant origin and destination for imports and exports.
Businesses based in Northern Ireland are more likely than those based in England and Wales to both import and export.

Imports

One in seven respondents (15%) report that their business directly imports any goods or services from a supplier, producer or wholesaler situated outside the UK. By nation, this proportion is highest within Northern Ireland (23%) and lowest within Wales (5%).

Figure 41: Proportion of businesses 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

F1New. Does your business currently directly import or purchase any goods or services from a supplier, producer or wholesaler situated outside the UK?

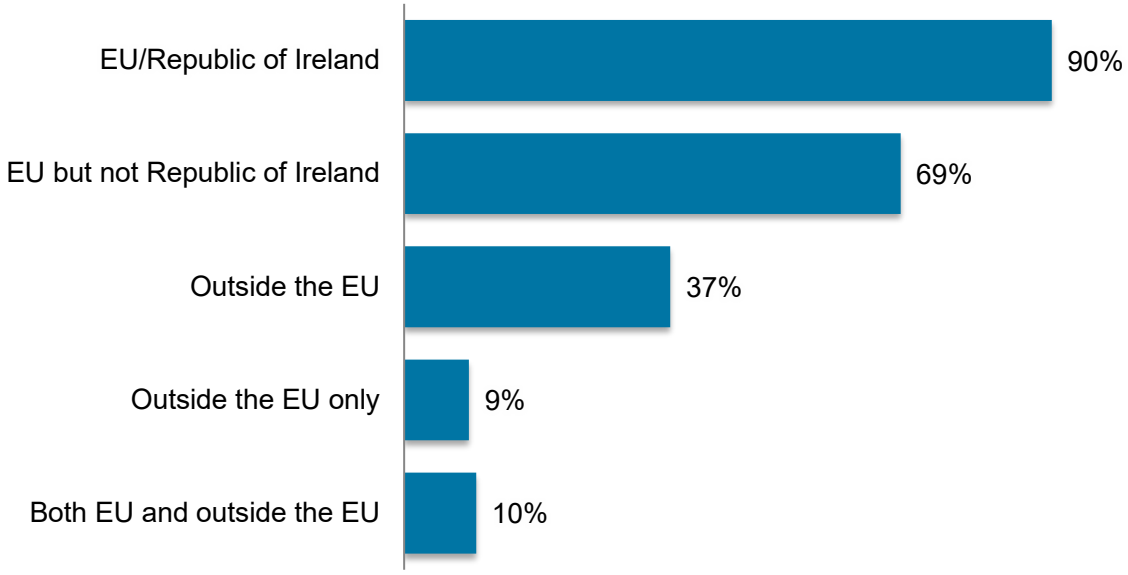
As one would expect, wholesale is the sector most likely to import (60%) but the proportion is also significantly higher than average amongst primary food producers (26%).

Reflecting the dominance of wholesale among importers, businesses with no direct sales to the public are significantly more likely than those that do sell directly to the public to import (38%, compared with 13%).

Looking at from where businesses import, the EU is the main geographic source. Nine in ten businesses that import buy from suppliers, producers or wholesalers based in the EU including Republic of Ireland (90%), which includes two-thirds of all importers that import from the EU but not Republic of Ireland (69%). More than a third of importers

buy from outside the EU (37%), which includes just 9% that import from outside the EU only.

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



Unweighted sample base = 98

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

As a proportion of all businesses, 13% import from the EU including Republic of Ireland. This increases to 22% in Northern Ireland where 11% of all businesses import from Republic of Ireland but not from elsewhere in the EU. Just 5% of all businesses import from outside the EU and this proportion is significantly higher than average in England (6%, compared with 1% in Northern Ireland and no businesses in Wales).

By sector, more than half of wholesalers import from the EU including Republic of Ireland (57%), and nearly a quarter of primary food producers do so (23%). Businesses that import from outside the EU are in the minority, accounting for one in six wholesalers (16%) and one in eight primary food producers (13%).

Table 13: Import activity, by nation and sector – prompted, multiple response (all respondents)

	All	Nation			Sector					
		England	Wales	Northern Ireland	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services
Imports directly	15%	14%	5%	**23%**	**26%**	17%	**60%**	13%	1%	9%
Imports from EU/ Republic of Ireland	13%	13%	5%	22%	**23%**	17%	**57%**	13%	1%	8%
Imports from EU but not Republic of Ireland	10%	10%	5%	11%	**18%**	12%	**44%**	12%	1%	5%
Imports from outside the EU	5%	**6%**	0%	1%	**13%**	7%	**16%**	2%	0%	4%
Imports from outside the EU only	1%	2%	0%	0%	3%	0%	3%	0%	0%	1%
Imports from EU and outside the EU	1%	1%	1%	4%	**6%**	0%	**10%**	<0.5 %	0%	<0.5%
Unweighted bases	*530*	*425*	*57*	*48*	*67*	*55*	*59*	*99*	*69*	*181*

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

Amongst Northern Ireland respondents that import, imports from Republic of Ireland are estimated to account for an average of 13% of business expenditure.

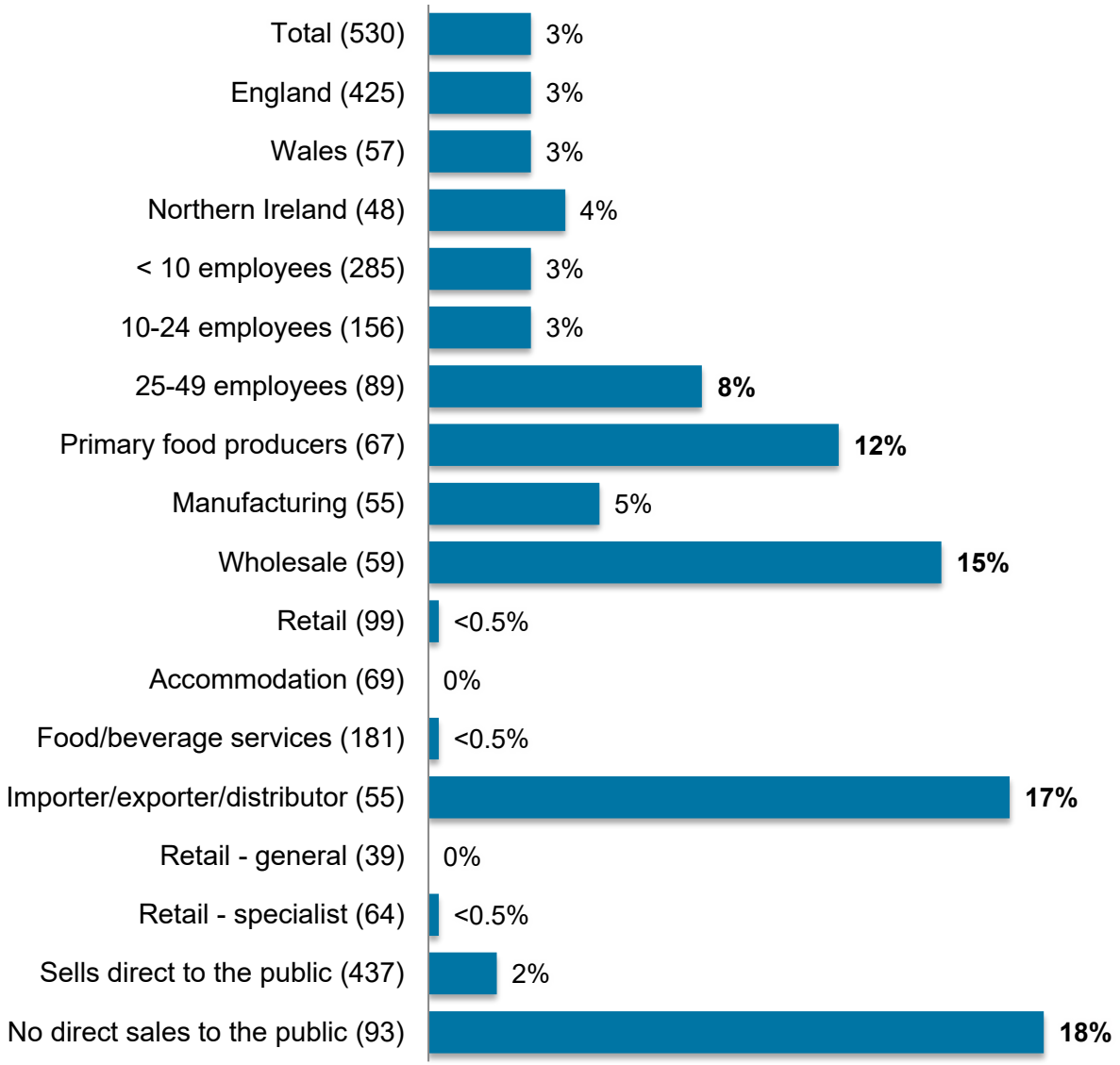
Exports

Export activity is much less common than the UK average[17] at just 3% of micro and small food businesses. This reflects 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 primary food producers (12%) and wholesalers, who are predominantly importers, are also significantly more likely than average to export (15%).

[17] 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)



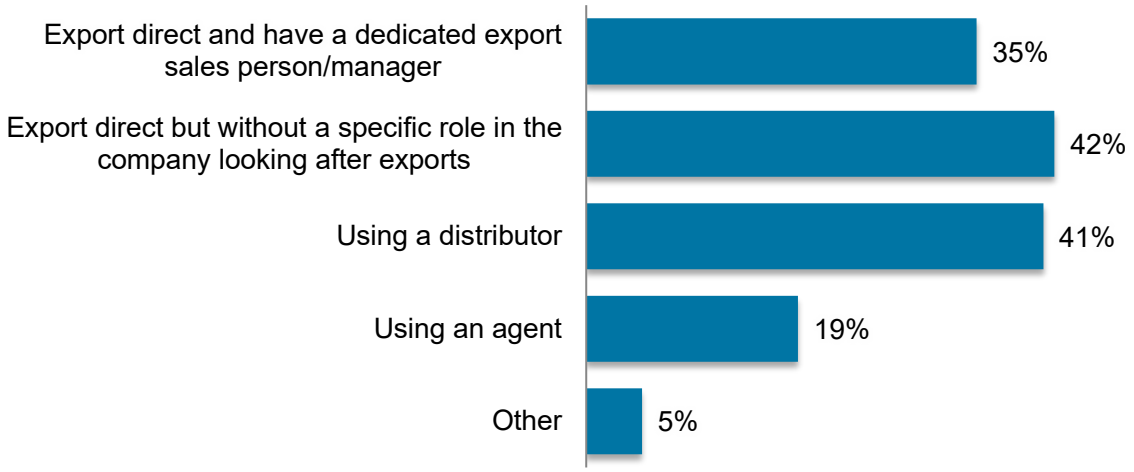
Unweighted sample bases in parentheses

F2a_new. Does your business export any products outside of the UK? This could include commissions, royalties and licences?

Around two-thirds of exporters do so directly (69%), while just over two-fifths (43%) export via an agent/distributor. However, the vast majority of wholesalers (94% of those that export) do not use an agent/distributor. A reflection, no doubt, of the function they themselves provide.

Businesses that export direct are more likely to do so without a specific role in the businesses that looks after these sales than to have a dedicated export sales person/manager (42% and 35% respectively). They are twice as likely to use a distributor than an agent (41%, compared with 19%).

Figure 44: Ways in which businesses export (where export)

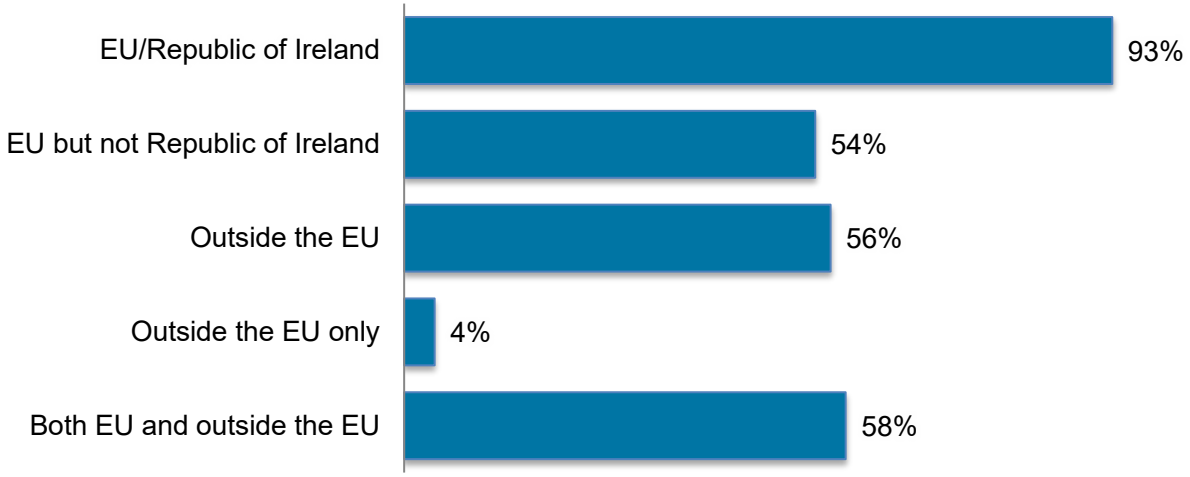


Unweighted sample base = 30

F2b_new. Which of the following describe the way in which your business exports?

EU, including Republic of Ireland is the main destination for exports (93% of exporters), with just over half of all exporters serving EU markets not including Republic of Ireland. Destinations outside the EU are more important to exporters than importers, with more than half of exporters selling to markets outside the EU (56%). However, it should be noted that exporters are a much smaller group than importers. Even amongst those that export to destinations outside the EU, the EU/Republic of Ireland are still important markets as only 4% of all exporters sell *only* to customers outside the EU.

Figure 45: Locations to which businesses export (where export)



Unweighted sample base = 30

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

Amongst Northern Ireland respondents that export, exports to Republic of Ireland are estimated to account for an average of 23% of business turnover.

8 IT and Websites

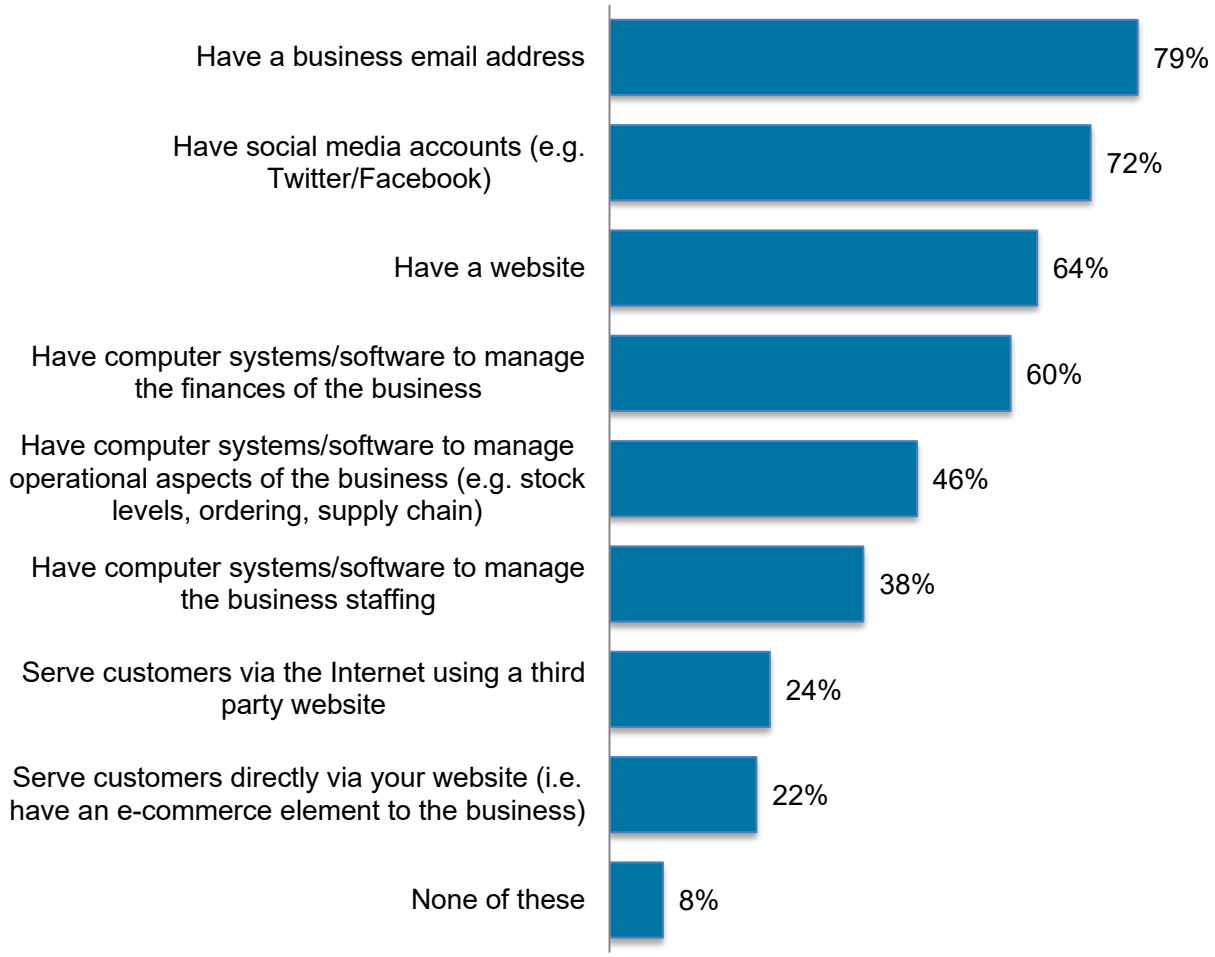
This chapter summarises the use of IT systems and facilities across micro and small food businesses.

IT and websites - key findings
While the majority of respondents report that their business has some IT systems and facilities in place, the type of facilities they have varies widely, with fewer than half using computer systems to manage operation aspects of their business, including stock levels and ordering.
While more than three-fifths of respondents report that their business has a website (64%) only around a fifth of businesses (22%) sell directly from their website, and businesses are slightly more likely to sell online via a third party website (24%).
Social media accounts are a popular means of promotion, particularly amongst new businesses (72%, increasing to 91% of businesses established in the last 12 months).

8.1 Use of IT systems and facilities

Overall use of IT systems and facilities are summarised in the figure below. Most respondents report that their business has one or more of a range of specified IT systems and facilities (92% do so).

Figure 46: IT systems, websites and social media accounts among businesses – prompted, multiple response (all respondents)



Unweighted sample base = 530

G1. Does your business...?

8.1.1 Internet facilities

Focusing on internet-based facilities, the most common facility that businesses set up is a business email address (79%), while slightly fewer have social media accounts i.e. Twitter/Facebook etc (72%). Fewer have a website for their business (64%) and it is likely that a social media presence is in lieu of a website for some.

A higher proportion of newly established businesses have social media accounts than longer established businesses (91% of those established for less than a year, compared with 85% of those established for between 1 and 5 years and 67% of those established for 5 or more years). It suggests that older businesses are slower to take up this means of promotion, although 'middle-aged' businesses (5-10 years) are more likely than young businesses to have a website (75%, compared with 43% of businesses established for less than a year).

Only around one in four businesses sell directly from a website (22%), increasing to around two in five small businesses with 25 to 49 employees (39%). Around half of accommodation (53%) and primary food producers (47%) sell directly from their website. It is a higher proportion than average amongst exporters (42%).

A slightly higher proportion sells off the internet via a third party website (24%). This could be something like Amazon or Ebay but there are a great many market place websites available, particularly for accommodation (such as, for example, trivago.com and airbnb). Again this proportion increases to 40% of small businesses with 25 to 49 employees and is higher than average amongst accommodation (68%) and primary food producers (43%). More than half of exporters (57%) sell via third party websites.

Table 14: Internet facilities used by businesses, by business size and sector – prompted, multiple response (all respondents)

		Business size			Sector					
	All	<10 employees	10-24 employees	25-49 employees	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services
Have a business email address	79%	74%	**95%**	**99%**	**97%**	81%	**90%**	74%	**98%**	73%
Have social media accounts (e.g. Twitter/Facebook)	72%	68%	**85%**	**84%**	**84%**	29%	65%	59%	67%	**76%**
Have a website	64%	57%	**89%**	**88%**	68%	39%	74%	42%	**93%**	67%
Serve customers directly via your website (i.e. have an e-commerce element to the business)	22%	20%	24%	**39%**	**47%**	19%	12%	14%	53%	16%
Serve customers via the Internet using a third party website	24%	23%	28%	**40%**	**43%**	14%	15%	8%	68%	22%
Unweighted bases	*530*	*285*	*156*	*89*	*67*	*55*	*59*	*99*	*69*	*181*

G1. Does your business...?

8.1.2 Computer systems/software

Focusing on computer systems/software within businesses, nearly half (46%) have computer systems software to manage operational aspects of the business such as stock levels, ordering and supply chain. Fewer (38%) have computer systems/software to manage the business' staffing, while having computer systems/software to manage the business' finances is more common (60%).

Use of computer systems/software is more dependent on business size than use of internet facilities is. It is less likely to be driven by business activity than the propensity to sell over the internet.

At least three-quarters of businesses with 25-49 employees have computer systems/software for at least one of these functions, compared with around half of businesses with less than 10 employees. There are significant differences between multi-site and single businesses in this respect, linked no doubt to overall business size, and this is also apparent for the adoption of internet facilities.

Of course, there is a link between use of computer systems and software and use of internet facilities in marketing the business and its products and services. It suggests a greater awareness and ability to make use of information technology for a range of purposes.

Table 15: Computer systems and software businesses use, by business size, number of sites and use of internet facilities – prompted, multiple response (all respondents)

	All	Business size			No. of sites		Use of internet facilities	
		<10 employees	10-24 employees	25-49 employees	Single site	Multi-site	Has a website	Has social media account
Have computer systems/software to manage the finances of the business	60%	54%	**79%**	**86%**	59%	71%	71%	69%
Have computer systems/software to manage operational aspects of the business (e.g. stock levels, ordering, supply chain)	46%	39%	**70%**	**77%**	46%	**75%**	59%	55%
Have computer systems/software to manage the business staffing	38%	32%	**59%**	**74%**	37%	**62%**	48%	43%
Unweighted bases	*530*	*285*	*156*	*89*	*497*	*33*	*361*	*365*

G1. Does your business...?

While the propensity to have computer systems/software in-house increases with business size and is largely dependent on that, there is significantly greater than average adoption within wholesale, accommodation and primary food production sectors. This is highlighted in the table below.

Table 16: Computer systems and software businesses use, by sector – prompted, multiple response (all respondents)

		Sector					
	All	Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services
Have computer systems/software to manage the finances of the business	60%	**73%**	56%	**85%**	46%	67%	58%
Have computer systems software to manage operational aspects of the business (e.g. stock levels, ordering, supply chain)	46%	**61%**	41%	**68%**	31%	**66%**	44%
Have computer systems/software to manage the business staffing	38%	34%	37%	**53%**	33%	41%	40%
Unweighted bases	*508*	*63*	*51*	*56*	*94*	*67*	*177*

E3. And who would you like to receive updates about any changes to food regulations from?

9 Business Profile

This chapter summarises the characteristics of micro and small food businesses as represented by survey respondents. The data is weighted to the latest available ONS IDBR[18] statistics (March 2017 at the time of the survey) relating to business 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.

9.1 Number of sites

The vast majority of businesses are single site establishments (97%). This reflects the exclusion of businesses with 50 or more employees from the survey.

Of those with more than one site, the majority (2% of all) have two sites, and the remainder (1%) have more than two.

One in five businesses with 25-49 employees has more than one site (19%) and the proportion is also significantly higher than average among manufacturers (9%).

9.2 Number of employees

The majority of businesses employ fewer than 10 employees across all sites (79%). Slightly more than half of these employ fewer than 5 employees (42% of all).

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

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

More than two-fifths of multi-site businesses (46%) employ between 10 and 24 staff, while a further third (32%) employ between 25 and 49 staff.

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

Table 17: Organisation size, by sector (all respondents)

	All	Sector					
		Primary food producers	Manufacturing	Wholesale	Retail	Accommodation	Food/beverage services
Micro:							
<5 employees	42%	**64%**	52%	37%	40%	38%	36%
5-9 employees	37%	26%	15%	36%	46%	19%	40%
Summary: Micro	79%	**90%**	67%	73%	**86%**	57%	76%
Small:							
10-24 employees	17%	8%	23%	21%	12%	**27%**	20%
25-49 employees	4%	2%	**11%**	7%	2%	**16%**	4%
Summary: Small	21%	10%	**34%**	28%	14%	**43%**	24%
Unweighted bases	*530*	*67*	*55*	*59*	*99*	*69*	*181*

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

9.3 Sector

The population of in-scope food businesses is dominated by those in food and beverage services (55%). Businesses that are mainly classified as accommodation businesses account for just 4% of all in-scope businesses, with similar proportions accounted for by food wholesalers (4%) and manufacturers (3%).

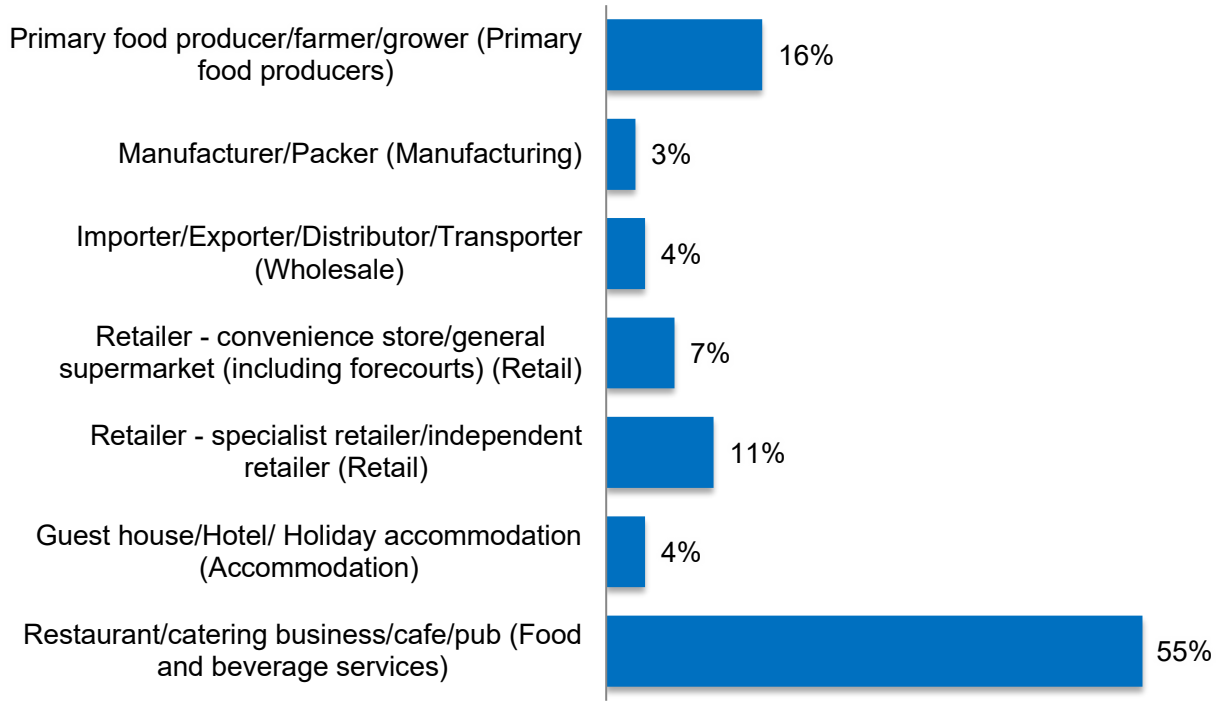
Food retailers (both general and specialised retailers) account for one in six businesses (17%) and primary food producers account for another one in six (16%).

Within the sample, general food retailers, which include convenience stores and small supermarkets, account for 7% of all businesses, and specialist, independent retailers account for 11%[19].

The vast majority of businesses sell direct to the public (93%), with the proportion actually varying considerably by sector. As one would expect, all food and beverage services and retail businesses sell direct to the public, but the proportions are significantly lower than average within the primary food production sector (81%), amongst wholesalers (50%) and manufacturers (28%).

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

Figure 47: Sector and sub-sector (all respondents)



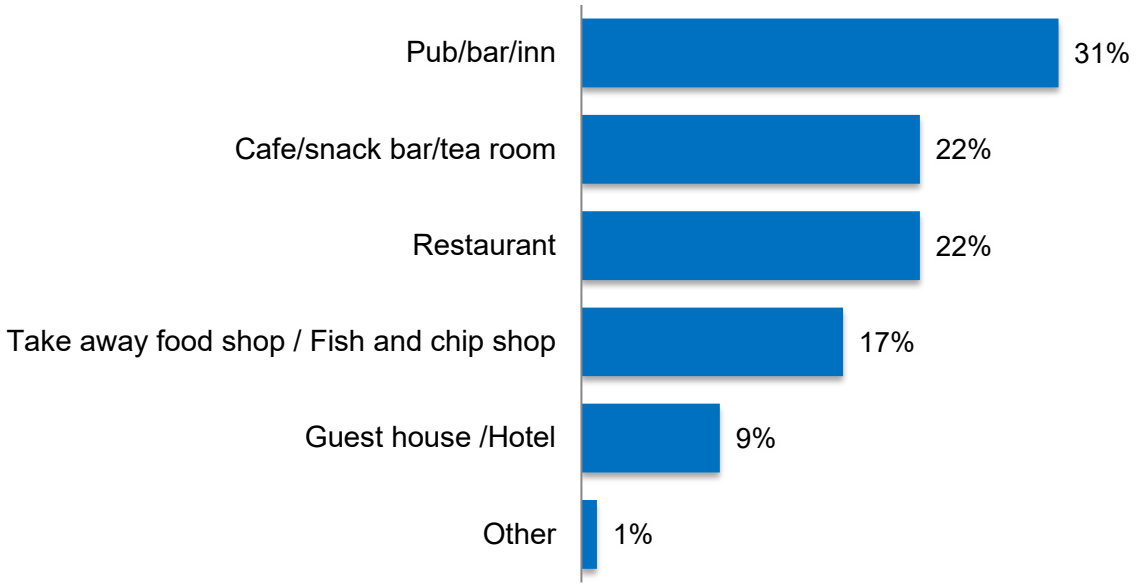
Unweighted sample base = 530

9.3.1 Type of business (accommodation/food and beverage services)

Respondents within accommodation and food and beverage services businesses were asked to describe the kind of restaurant or catering business they work for or own. A third (31%) described their business as a public house, bar or inn, while just over a fifth described their business as a cafe, snack bar or tea room (22%) and a similar proportion as a restaurant (22%). One-sixth (17%) described their business as a take away food shop or fish and chip shop, while fewer respondents (9%) described their business as a guest house or hotel.

There is some overlap between accommodation and food and beverage services, as businesses 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 business rather than the accommodation aspects - and vice versa.

Figure 48: Description of restaurant or catering business (accommodation/food and beverage services sectors)



Unweighted sample base = 250

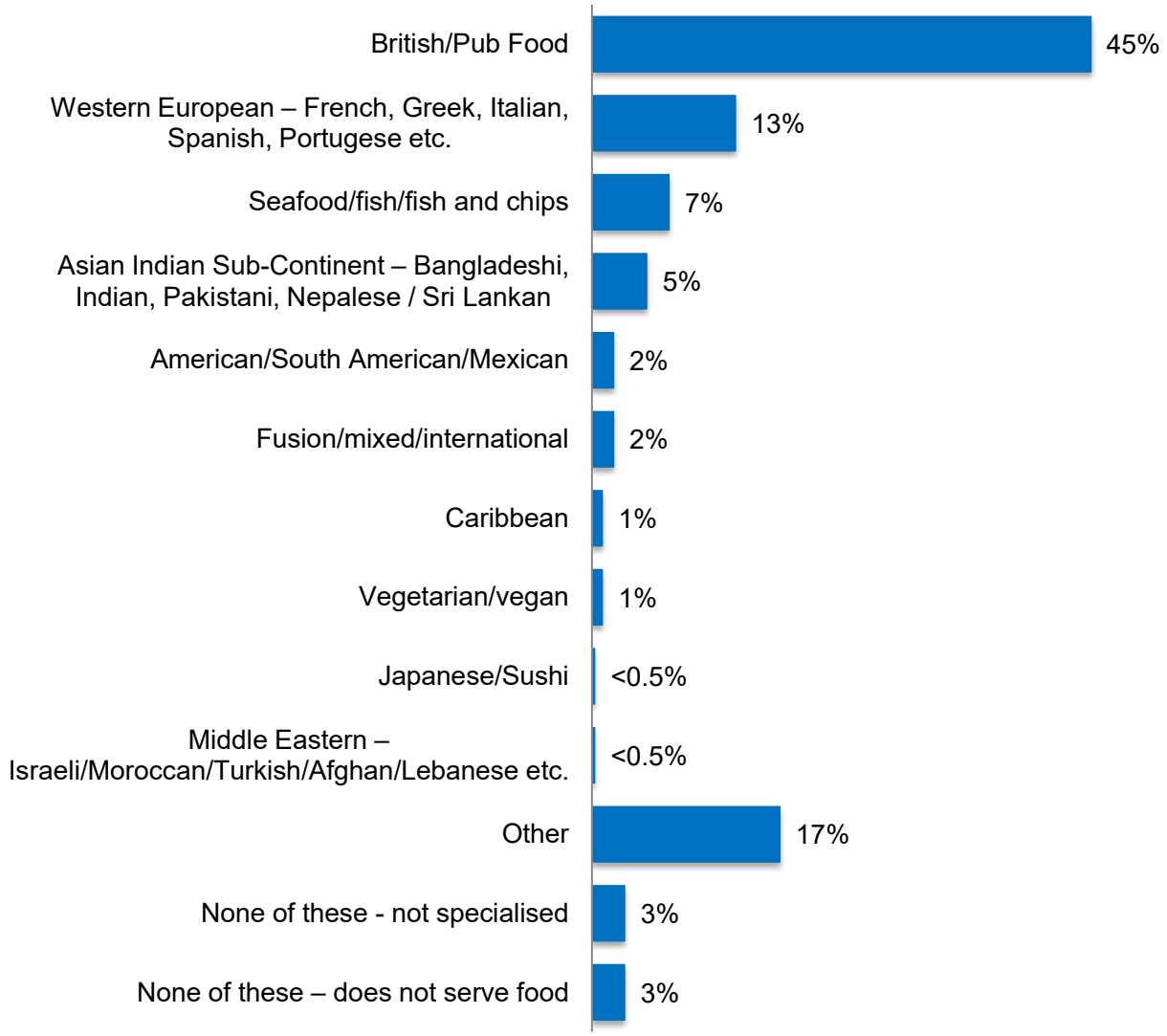
A3. How would you describe the kind of restaurant or catering business you work for/own?

In terms of the particular cuisines that accommodation and food and beverage services businesses specialise in, nearly half (45%) specialise in British or 'Pub' food. 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[20].

Next most frequently cited is Western European cuisine (13%), which includes dishes from, for example, France, Greece, Italy, Spain and Portugal.

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

Figure 49: Type of cuisine specialised in (accommodation/food and beverage services sectors)



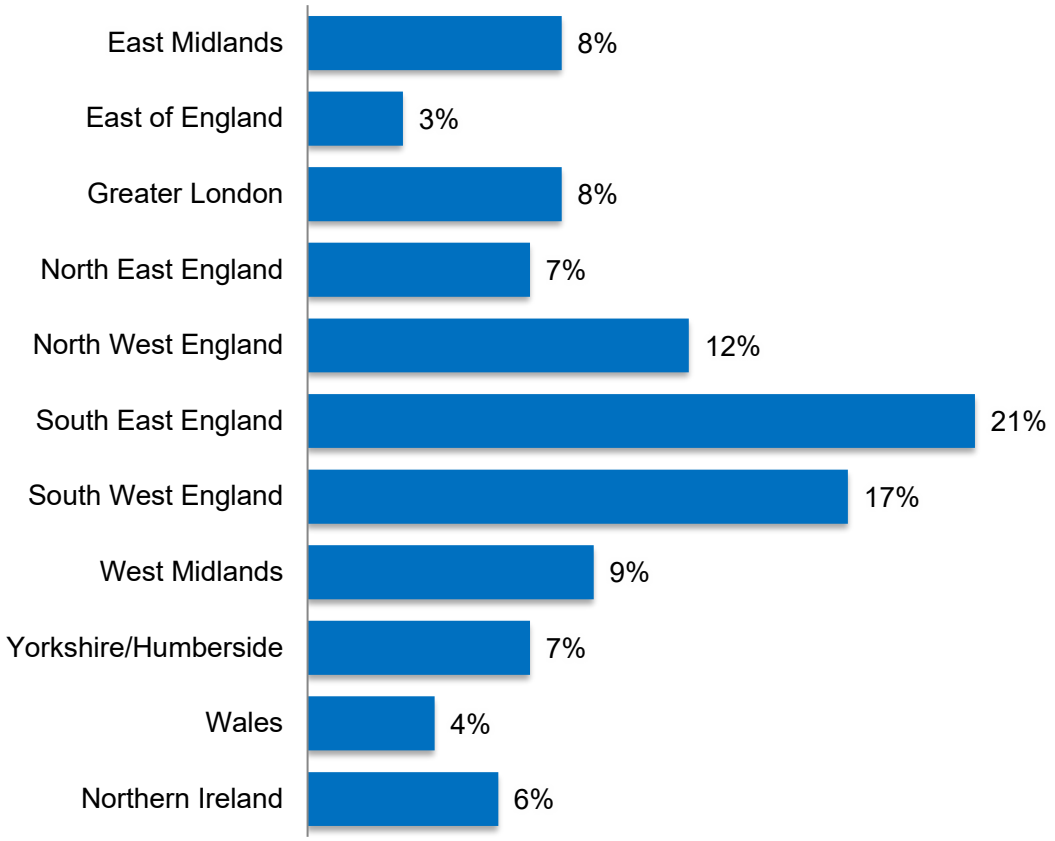
Unweighted sample base = 250

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

9.4 Geographic location

Respondents were asked about the areas of the UK in which their organisation has sites and given that the vast majority of businesses have only one site, there were very few that mentioned more than one area. Even multi-site businesses 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 50: Area of the UK in which businesses are based (all respondents)



Unweighted sample base = 530

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

9.5 Years established

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

More than half the businesses (55%) have been trading for at least 10 years, including 32% of all that have been trading for more than 20 years.

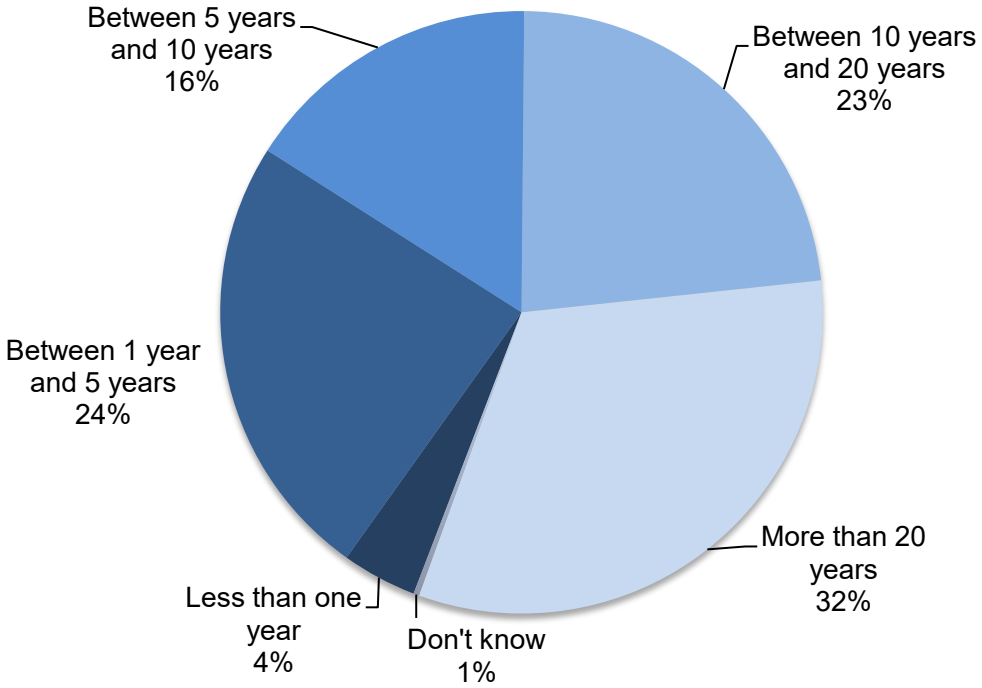
The longest established businesses are to be found within the 25-49 employee size band (42% have been trading for more than 20 years); and three-fifths of multi-site businesses (60%) have been trading for more than 20 years.

Longer established businesses are most prevalent within manufacturing (82% have been trading for more than 20 years); accommodation (51%) and retail (46%). This contrasts with only around a fifth of food and beverage services businesses (22%).

More than a quarter of businesses have been trading for no more than 5 years (28%), which includes just 4% that are newly established in the last year. The proportion of young businesses (i.e. up to 5 years old) increases to 37% of food and beverage services businesses.

Focusing on FHRS rated businesses[21], there is a significantly higher proportion of young businesses amongst low performing (FHRS rating: 0-2) businesses. More than two-fifths have been trading for less than 5 years (44%), although they are no more likely than average to have been trading for less than a year (5%).

Figure 51: Years established (all respondents)



Unweighted sample base = 530

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

[21] Retail, accommodation and food and beverage services in England, Wales and Northern Ireland and wholesalers and manufacturers in Wales that are included in the FHRS database, managed by the FSA.

Appendix I: Sample breakdown

Table 18: Sample breakdown

	Achieved interviews no.	Unweighted sample %	Weighted no.	Weighted sample %
Primary food producers	67	13%	83	16%
Manufacturing	55	10%	15	3%
Wholesale	59	11%	24	4%
Retail	99	19%	92	17%
Accommodation	69	13%	22	4%
Food and beverage service activities	181	34%	294	55%
<10 employees	285	54%	417	79%
10-24 employees	156	29%	89	17%
25-49 employees	89	17%	23	4%
England	425	80%	482	91%
Wales	57	11%	19	4%
Northern Ireland	48	9%	30	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	48	9%	76	14%
3	37	7%	50	9%
4	74	14%	83	16%
5	228	43%	226	43%
Awaiting inspection/no rating (all businesses)	143	27%	95	18%
Total	**530**	**100**	**530**	**100**

Appendix II: Standard Industrial Classifications

Table 19: 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

Appendix III: Questionnaire employed

FSA Small and Micro FBO Tracking Survey – Wave 1

INTRODUCTION:

Can I please check, is this [INSERT ORGANISATION NAME FROM SAMPLE]? [If not the same organisation name close survey]

Ask to speak to the business owner, managing director or general manager/senior manager at the site.

Good morning / afternoon my name is [NAME] calling on behalf of the Food Standards Agency from BMG Research.

We are conducting a survey to explore attitudes to regulatory issues, the UK's exit from the EU and priorities and concerns amongst businesses in the food industry. Your help would be greatly appreciated as we want to ensure a wide range of views are represented.

The survey results will help future decision making in this area. All the information we collect will be kept in the strictest confidence by BMG Research and used for research purposes only.

ADD IF NECESSARY: BMG abides by the Market Research Society's Code of Conduct and the Data Protection Act so responses are confidential and the findings from the survey will only be used for research purposes. Answers will be fed back in a way that will not permit this organisation to be identified.

You can find out more about our surveys in our Privacy Notice. INTERVIEWER ESTABLISH IF WEBSITE ADDRESS WANTED OVER PHONE OR VIA EMAIL (www.bmgresearch.co.uk/privacy)

S2 Are you happy to continue?

REASSURANCES AS NEEDED:
The survey will take around 20 minutes, but the time taken will depend on your answers
Your premises have been randomly chosen from a list of businesses provided by database providers, Dun and Bradstreet.
BMG Research follows the Market Research Society Code of Conduct.
It will not be possible to identify any particular person or organisation in the results.
We guarantee that once BMG Research has received your survey responses, we will not show any individual answers, to the Food Standards Agency or any other organisation; unless you have given your permission.
If you would like to confirm that BMG Research is a bona fide research company, you may call the Market Research society, free of charge, on 0800 975 9596.
The project manager at BMG Research is Emma Parry (0121 333 6006 if you have any concerns.
IF ADDITIONAL REASSURANCE IS STILL REQUIRED:
INTERVIEWER: Offer to e-mail the letter of endorsement.

SCREENING:

ASK ALL
S1 Interviewer record name and job title

Name: _____

Job title: _____

ASK ALL
S2 Can I just check, is this establishment..? READ OUT; CODE ONE

1	The only establishment in the organisation, or
2	One of a number of establishments within a larger organisation

IF S2 = 2
S3 Is this establishment the headquarters of the organisation or a branch or subsidiary? CODE ONE

1 Headquarters CONTINUE
2 Branch/subsidiary THANK AND CLOSE: ASK FOR DETAILS OF HEADQUARTERS OR ASK TO BE TRANSFERRED

ASK ALL
S4 Can I also please confirm that your establishment is not part of a franchise? CODE ONE

1 Not a franchise CONTINUE
2 A franchise THANK AND CLOSE

ASK ALL

S5 How many employees, including yourself, work for your business [S2/2: including at all business locations]?

READ OUT: By employee, we mean someone with a contract of employment, including outworkers or people on zero hours contracts, but excluding any employees of other organisations working at your premises. Please include part-timers.

_____

IF 50 OR MORE THANK AND CLOSE

For quotas:

1	1, including respondent
2	2-9
3	10-24
4	25-49
5	50+ thank and close

IF S2 = 2

S6. How many premises does the business have?

_____

X Don't know Y Refused

CATI CHECK IF 10+: Can I confirm that you have [S5 answer] employees across all your sites?

1 Yes

2 No RECORD NEW ANSWER ____ IF >50 THANK AND CLOSE

Section A: Business profile

ASK ALL

A1. I have *[READ OUT SIC DESCRIPTION ON SAMPLE]* as a general classification for your business. Does this sound about right?

Yes	1
No	2

IF A1=2

A2A. What is the main business activity at this site? PROBE FOR AS MUCH DETAIL AS POSSIBLE AND WRITE IN.

What is the main product or service of the business?
What exactly is made or done at this site?
What would you type into a search engine to find an organisation like yours?

_____

(OFFICE CODE SIC 5 DIGIT)

USE INFORMATION GIVEN TO CODE ALL THAT APPLY BELOW (PROMPT AS NECESSARY):

Can I confirm that your business is a....?

1 Primary food producer / farmer / grower (Primary)
2 Manufacturer / Packer (Manufacturing)
3 Importer/ Exporter /Distributor / Transporter (Wholesale)
5 Retailer - convenience store /general supermarket (including forecourts) (Retail)
6 Retailer - specialist retailer / independent retailer (Retail)
7 Guest house /Hotel/ holiday accommodation (Accommodation)
8 Restaurant / catering business / café / pub (Food and beverage service)
9 NOT food or drink related THANK AND CLOSE: *'Thank you for your time but we are only speaking to food or drink related businesses.'*

OFFICE INFORMATION: ALL SAMPLE TO BE ALLOCATED TO A2 LIST

ASK ALL

A2B. Can I confirm, do you sell direct to the public?

Yes	1
No	2

IF A1=1 AND DATABASE: SIC CODE 55 OR 56 OR IF A1=2 AND (ACCOMMODATION) (FOOD AND BEVERAGE SERVICE) (A2/7, 8)

A3. How would you describe the kind of restaurant or catering business you work for/own? DO NOT READ OUT BUT GIVE EXAMPLES FROM LIST AS APPROPRIATE. CODE ALL THAT APPLY

1 Café/snack bar/tea room
2 Caterer
3 Catering – mobile
4 Guest house /Hotel
5 Pub/bar/inn
6 Restaurant
7 Take away food shop / Fish and chip shop
8 Other (SPECIFY)

IF A1=1 AND DATABASE: SIC CODE 55 OR 56 OR IF A1=2 AND (ACCOMMODATION) (FOOD AND BEVERAGE SERVICE) (A2/7, 8)

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

DO NOT READ OUT BUT GIVE EXAMPLES TO DIRECT RESPONSES APPROPRIATELY. CODE ALL THAT APPLY

1 African
2 American / South American / Mexican
3 Asian Indian Sub-Continent – Bangladeshi, Indian, Pakistani, Nepalese / Sri Lankan
4 British / Pub Food
5 East Asian - Cantonese / Chinese/ Thai/ Szechuan/ Vietnamese/ Indonesian
6 Fusion / mixed / international
7 Japanese / Sushi
8 Caribbean
9 Eastern European – Czech, Polish, Russian etc.
10 Western European – French, Greek, Italian, Spanish, Portugese etc.
11 Middle Eastern – Israeli /Moroccan / Turkish / Afghan / Lebanese etc.
12 Vegetarian / vegan
13 Seafood / fish/ fish and chips
14 Other (SPECIFY)
15 None of these - not specialised
16 None of these – does not serve food
17 Don't know

ASK ALL

A5. In which area(s) of the UK is your organisation based? [S2/2: Please tell us all the areas in which you have sites] PROMPT AS NECESSARY. S2/1: CODE ONE ONLY S2/2: CODE ALL THAT APPLY

1 North East England
2 North West England
3 Yorkshire/Humberside
4 East Midlands
5 West Midlands
6 East of England
7 Greater London
8 South East England
9 South West England
10 Wales
11 Northern Ireland

ASK ALL

A6. How long has your business been trading? [S2/2: This is from when the first site was established] PROMPT AS NECESSARY AND CODE ONE ONLY

1 Less than one year
2 Between 1 year and 5 years
3 Between 5 years and 10 years
4 Between 10 years and 20 years
5 More than 20 years
6 Don't know

Section B: Priorities and concerns

READ OUT: I'm now going to ask you some general questions about your business and its priorities and current concerns.

ASK ALL

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? READ OUT. RANDOMISE CODES 1-11 ONLY. CODE ALL THAT APPLY

1 Obtaining finance
2 Taxation, VAT, PAYE, National Insurance, business rates
3 Staff recruitment and skills
4 Regulations/red tape
5 Availability/cost of suitable premises
6 Competition in the market
7 Workplace pensions
8 Late payment
9 The UK exit from the EU
10 National Living Wage
11 Lack of adequate broadband
12 Any other major issues or obstacles? (SPECIFY)
13 None of these
14 Don't know/No opinion
15 Refused

ASK ALL

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? PROMPT AS NECESSARY. CODE ONE ONLY

1 Largely negative
2 Some negative impact
3 Mixed impact
4 Some positive impact
5 Largely positive
6 No impact expected
7 Don't know

ASK ALL

B4. Why do you say that? PROBE FULLY

ASK ALL

B6. Is your business doing anything to prepare for the UK's EU Exit? PROMPT AS NECESSARY AND CODE ONE ONLY

1 Yes
2 No
3 Don't know

IF YES (B6/1)

B7. What, is your business doing to prepare for the UK's exit from the EU? PROBE FULLY

X Don't know Y Refused

ASK ALL

B8. On the whole, how do you hope that regulation around food in the UK will change as a result of the UK leaving the European Union? Will you hope for ... READ OUT AND CODE ONE ONLY

1 More
2 Less
3 No change
4 Don't know
5 Prefer not to say

ASK WHERE MORE OR LESS (B8/1, 2)

B9. Why do you say that? PROBE FULLY

Section C: Awareness of and attitudes to regulation

READ OUT: Thinking now about food safety and the food hygiene regulations that your business has to meet and the processes in place to monitor and check that your business is conforming with them....

ASK ALL

C1. To what extent do you agree or disagree that... READ OUT AND PROMPT AS NECESSARY WITH CODES AND CODE ONE FOR EACH.

	Strongly Disagree	Slightly disagree	Slightly agree	Strongly Agree	Don't know	Not applicable to business
READ OUT: Regulations....						
...are effective at protecting the public	1	2	3	4	5	6
...are reasonable for food businesses	1	2	3	4	5	6
...add value to your business	1	2	3	4	5	6
...are easy and practical to keep to	1	2	3	4	5	6
READ OUT: The processes in place to ensure food businesses keep to the regulations....						
...are conducted fairly	1	2	3	4	5	6
...help to ensure the worst performing food businesses will improve	1	2	3	4	5	6
READ OUT: Do you agree or disagree that...						
...paperwork involved in keeping to the regulations is reasonable	1	2	3	4	5	6
...information on food safety and hygiene is easy to find and access	1	2	3	4	5	6

ASK ALL

C1b. Do you feel you know who to contact if you need advice on a food safety or hygiene issue?

1 Yes
2 No

ASK ALL

C3. I am now going to run through a list of food safety requirements that most food businesses need to follow. For each one, based on your own experience of the systems and processes that exist, 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….. IF NECESSARY: We are interested in your views even if food safety requirements are not directly relevant to your business.

READ OUT STATEMENTS AND PROMPT AS NECESSARY WITH CODES AND CODE ONE FOR EACH. RANDOMISE

	Very uncertain	Quite uncertain	Quite certain	Very certain	Don't know
Make sure food is safe to eat	1	2	3	4	5
Make sure food is correctly labelled / what it says it is	1	2	3	4	5
Make sure they don't mislead people by the way food is labelled, advertised or marketed	1	2	3	4	5
Keep records on where they got food from and show this information on demand - known as 'traceability'	1	2	3	4	5
Withdraw /recall unsafe food and completing an incident report	1	2	3	4	5
Display their food hygiene scheme rating (if they sell food direct to the public)	1	2	3	4	5
Provide clear information on allergens	1	2	3	4	5

ASK ALL

C4. In meeting food safety and hygiene regulations food businesses will usually deal with one or more external organisations or people. Who plays a role in providing information, support and / or checking that you are meeting the regulations, for instance doing inspections, in your business? DO NOT PROMPT. LISTEN AND CODE ALL THAT APPLY

1 Local Council / Local Authority (the respondent may name the Council)/ Environmental Health Officer (EHO)
2 The Food Standards Agency
3 Department of Agriculture, Food & Rural Affairs (DEFRA) – England and Wales
4 Department of Agriculture, Environment & Rural Affairs (DAERA) – NI
5 Farm Assurance / Red Tractor/ Independent consultant
95 Other (SPECIFY)
96 No one
97 Don't know
98 Refused

IF DID NOT MENTION THE FSA AT C4 (C4/NOT 2)

C5. Before today, had you heard of the Food Standards Agency?

1 Yes
2 No

IF AWARE OF FSA (C4/2 OR C5/1)

C6_new. How good an understanding would you say that you have of the role of the Food Standards Agency? Would you say it was…

1 None at all
2 Very limited
3 A fairly good understanding
4 A very good understanding
5 Don't know - DO NOT READ OUT

ASK ALL

C7. In the last 12 months, have you had any contact with [IF ENG/WALES: your local authority IF NI AND QA2A/NOT 1 (DATABASE SIC: NOT 01-03: your district council IF NI AND Q2A/1 (DATABASESIC: 01-03: 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

1 Yes
2 No
3 Can't recall

IF HAD ANY CONTACT (C7/1)

C8. Was this by ...? READ OUT AND CODE ALL THAT APPLY

1 Phone
2 Post
3 Email
4 Website visit
5 Face to face
6 Can't recall

ASK ALL WHO HAVE HAD CONTACT WITH THE LA IN LAST 12 MONTHS (EXCEPT WHERE WEBSITE VISITS ONLY) (C7/1 and C8/1,2,3,5,6)

C9. Based on your recent contact with [IF ENG/WALES: your local authority IF NI AND QA2A/NOT 1 (DATABASE SIC: NOT 01-03: your district council IF NI AND Q2A/1 (DATABASESIC: 01-03: the Department of Agriculture, Environment and Rural Affairs (DAERA)], how would you rate it on the following service aspects. Please provide a rating out of 10, where 1 is very poor and 10 is excellent. READ OUT EACH ASPECT AND CODE ONE FOR EACH

A	Trustworthy
B	Easy to deal with
C	Approachable
D	Clear in their communications

IF HAD ANY CONTACT (C7/1)

C10. How easy was it to obtain all the information you needed from the [IF ENG/WALES: local authority IF NI AND QA2A/NOT 1 (DATABASE SIC: NOT 01-03: district council IF NI AND Q2A/1 (DATABASESIC: 01-03: the Department of Agriculture, Environment and Rural Affairs (DAERA)]? PROMPT AS NECESSARY. CODE ONE ONLY

1 Very easy
2 Quite easy
3 Neither easy nor difficult
4 Quite difficult
5 Very difficult
6 Don't know

IF AWARE OF FSA (C4/2 OR C5/1)

C11. In the last 12 months, have you had any contact with the FSA with regard to food safety or hygiene issues?

1 Yes
2 No
3 Can't recall

IF HAD ANY CONTACT (C11/1)

C12. Was this by ...? READ OUT AND CODE ALL THAT APPLY

1 Phone
2 Post
3 Email
4 Website visit
5 Face to face
6 Can't recall

ASK ALL WHO HAVE HAD CONTACT WITH THE FSA IN LAST 12 MONTHS (EXCEPT WHERE WEBSITE VISITS ONLY) (C12/1-3, 5-6)

C13. Based on your recent contact with the FSA, how would you rate it on the following service aspects. Please provide a rating out of 10, where 1 is very poor and 10 is excellent. READ OUT EACH ASPECT AND CODE ONE FOR EACH

A	Trustworthy
B	Easy to deal with
C	Approachable
D	Clear in their communications

IF HAD ANY CONTACT (C11/1)

C14. How easy was it to obtain all the information you needed from the FSA? PROMPT AS NECESSARY. CODE ONE ONLY

1 Very easy
2 Quite easy
3 Neither easy nor difficult
4 Quite difficult
5 Very difficult
6 Don't know

IF AWARE OF FSA (C4/2 OR C5/1)

C15. 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. READ OUT AND CODE ONE FOR EACH.

	Strongly Disagree	Slightly disagree	Slightly Agree	Strongly Agree	Don't know
The FSA's work is very high profile	1	2	3	4	5
READ OUT: The FSA....					
...is good at identifying where poor standards exist	1	2	3	4	5
... understands the needs of small food businesses	1	2	3	4	5
.... is highly effective at regulating the food industry	1	2	3	4	5
...would be a good organisation to work with	1	2	3	4	5
... is working hard to improve the food industry for all of us	1	2	3	4	5
READ OUT: Do you agree or disagree that you.....					
... trust the FSA to do a good job	1	2	3	4	5

	Strongly Disagree	Slightly disagree	Slightly Agree	Strongly Agree	Don't know
...trust the FSA to use any information I give to them appropriately	1	2	3	4	5

Section D: Experiences of processes/interventions

ASK ALL

D1. Which, if any, of the following has your business experienced or been involved in within the last 12 months? READ OUT AND CODE ONE FOR EACH

		Yes	No	Unsure
A	IF A6/1-2: Initial registration as a food business	1	2	3
B	A food hygiene inspection by the [IF ENG/WALES: local authority IF NI AND QA2A/NOT 1 (DATABASE SIC: NOT 01-03: district council IF NI AND Q2A/1 (DATABASESIC: 01-03: Department of Agriculture, Environment and Rural Affairs (DAERA)]	1	2	3
C	A food safety product recall or withdrawal	1	2	3
D	Having a food sample taken by the [IF ENG/WALES: local authority IF NI AND QA2A/NOT 1 (DATABASE SIC: NOT 01-03: district council IF NI AND Q2A/1 (DATABASESIC: 01-03: Department of Agriculture, Environment and Rural Affairs (DAERA)]	1	2	3
E	Having enforcement action taken against us (this means anything from written warnings to serving of a notice; prohibiting food operations; closing your premises through to prosecution)	1	2	3
F	Voluntarily closing down the business to make improvements following an inspection	1	2	3

WHERE YES TO ANY (D1/ANY CODE 1), ASK FOR EACH

D2. How clear were any communications you received relating to [D1 CODE 1 EXPERIENCE]?

D3. And how easy or difficult did you find it to complete the required process of [D1 CODE 1 EXPERIENCE]

READ OUT EACH FROM D1 AND CODE ONE FOR EACH BEFORE MOVING TO NEXT D1 RESPONSE

A	Initial registration as a food business	Very unclear	Quite unclear	Quite clear	Very clear	Don't know
		1	2	3	4	5
		Very difficult	Quite difficult	Quite easy	Very easy	Don't know
		1	2	3	4	5
B	A food hygiene inspection by the [IF ENG/WALES: local authority IF NI AND QA2A/NOT 1 (DATABASE SIC: NOT 01-03: district council IF NI AND Q2A/1 (DATABASESIC: 01-03: Department of Agriculture, Environment and Rural Affairs (DAERA)]	Very unclear	Quite unclear	Quite clear	Very clear	Don't know
		1	2	3	4	5
		Very difficult	Quite difficult	Quite easy	Very easy	Don't know
		1	2	3	4	5
C	A food safety product recall or withdrawal	Very unclear	Quite unclear	Quite clear	Very clear	Don't know
		1	2	3	4	5
		Very difficult	Quite difficult	Quite easy	Very easy	Don't know
		1	2	3	4	5
D	Having a food sample taken by the [IF ENG/WALES: local authority IF NI AND QA2A/NOT 1 (DATABASE SIC: NOT 01-03: district council IF NI AND Q2A/1 (DATABASESIC: 01-03: Department of Agriculture, Environment and Rural Affairs (DAERA)]	Very unclear	Quite unclear	Quite clear	Very clear	Don't know
		1	2	3	4	5
		Very difficult	Quite difficult	Quite easy	Very easy	Don't know
		1	2	3	4	5
E	Having enforcement action taken against us	Very unclear	Quite unclear	Quite clear	Very clear	Don't know
		1	2	3	4	5
		Very difficult	Quite difficult	Quite easy	Very easy	Don't know
		1	2	3	4	5

F	Voluntarily closing down the business to make improvements following an inspection	Very unclear	Quite unclear	Quite clear	Very clear	Don't know
		1	2	3	4	5
		Very difficult	Quite difficult	Quite easy	Very easy	Don't know
		1	2	3	4	5

IF HAVE EXPERIENCED A FOOD PRODUCT RECALL OR WITHDRAWAL (D1C/1)

D4. You said you have experienced a food product / withdrawal in the last 12 months. When that happened, what did you do? PROBE FULLY

Ask: *Who did you go to for advice on what to do? Who did you tell and when? What did you do with affected product you still had? What did you do about affected product that you had sold?*

X don't know Y Refused

ASK ALL

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

1 Yes
2 No
3 Don't know

Section E: Information and communication

READ OUT: I'd now like to ask you about your information and communication preferences regarding food safety and hygiene.

ASK ALL

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...? READ OUT EACH

A	The news	1
B	The Food Standards Agency website	2
C	The Food Standards Agency helpline	3
D	[IF ENG/WALES: Your local authority IF NI AND QA2A/NOT 1 (DATABASE SIC: NOT 01-03: Your local council IF NI AND Q2A/1 (DATABASESIC: 01-03: the Department of Agriculture, Environment and Rural Affairs (DAERA)] website	4
E	Safer food, better business packs	5
F	Food Standards Agency leaflets	6
G	Industry magazines	7
H	Generic web search e.g. Google	8
I	Environmental Health website	9
J	Trading Standards website	10
K	Colleagues/associates	11
L	Business networks e.g. Federation of Small Businesses	12
M	[IF Eng/Wales/Scotland: National Farmers Union (NFU) IF NI: Ulster Farmers Union (UFU)	13
N	Do you use any other information sources? (IF YES SPECIFY)	14
	Do not use any	15
	Don't know DO NOT READ OUT	16

ASK ALL

E2. How would you like to be told about any changes to food regulations in future? PROMPT AS NECESSARY. CODE ALL THAT APPLY

1 Email alerts
2 Leaflets / letters through the post
3 Text / SMS message alerts
4 Face to face visits
5 By telephone
6 Other (SPECIFY)
7 I don't mind
8 Don't know
9 Not interested in receiving updates SKIP TO E4

IF INTERESTED IN RECEIVING UPDATES (E2/1-8)

E3. And who would you like to receive updates about any changes to food regulations from? DO NOT PROMPT. CODE ALL THAT APPLY

1 My local authority / Council / Environmental Health Officer
2 The FSA
3 Other (SPECIFY)
4 I don't mind
5 Don't know
6 Not interested in receiving updates

IF AWARE OF FSA (C3/2 OR C4/1)

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

1 Yes
2 No – but have heard of it
3 No – have not heard of it
4 Don't know

IF SUBSCRIBED TO FSA ALERT (E4/1)

E5. How useful have you found the FSA alerts service? PROMPT AS NECESSARY AND CODE ONE ONLY

1 Not at all useful
2 Not very useful
3 Quite useful
4 Very useful
5 Don't know
6 Haven't received any alerts from FSA

ASK ALL

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

1 Yes
2 No

WHERE AWARE (E6/1)

E7. Did you know that you can report food crime anonymously to the National Food Crime Unit?

1 Yes
2 No

Section F: Exports/imports

READ OUT: Now, just a couple of questions about the markets you trade with...

ASK ALL
F1_new Does your business currently directly import or purchase any goods or services from a supplier, producer or wholesaler situated outside the UK?

1 Yes
2 No
3 Don't know
4 Refused

IF IMPORT (F1_NEW/1)
F1. ...are these overseas suppliers, producers or wholesalers based ….? READ OUT AND CODE ALL THAT APPLY

1 Within the EU or EEA (European Economic Area)
2 Outside of the EU or EEA (and the UK) i.e. the rest of the world
3 The Republic of Ireland
4 Don't know

ASK ALL
F2a_new Does your business export any products outside of the UK? This could include commissions, royalties and licences?

1 Yes
2 No
3 Don't know
4 Refused

IF EXPORTS (F2a_new/1)
F2b_new Which of the following describe the way in which your business exports? READ OUT; CODE ALL THAT APPLY

Export direct and have a dedicated export sales person/manager	1
Export direct but without a specific role in the company looking after exports	2
Using a distributor	3
Using an agent	4
Any other	5
DNRO: Don't know	6
DNRO: Refused	7

IF EXPORTS (F2a_new/1)

F2. Are these overseas customers and suppliers based….? READ OUT AND CODE ALL THAT APPLY

1 Within the EU or EEA (European Economic Area)
2 Outside of the EU or EEA (and the UK) i.e. the rest of the world
3 The Republic of Ireland
4 None of these, just the UK
5 Don't know

NI BUSINESSES THAT IMPORT FROM EIRE (F1/3):

F3. What proportion of your business expenditure is accounted for by imports from the Republic of Ireland? PROMPT FOR AN APPROXIMATION. IF UNSURE CODE TO BAND

_____

1 Less than 10%
2 10-25%
3 25-50%
4 50-75%
5 Over 75%
6 Don't know
7 Refused

NI BUSINESSES THAT EXPORT TO EIRE (F2/3):

F4. What proportion of your turnover is accounted for by sales to the Republic of Ireland? PROMPT FOR AN APPROXIMATION. IF UNSURE CODE TO BAND

_____

1 Less than 10%
2 10-25%
3 25-50%
4 50-75%
5 Over 75%
6 Don't know
7 Refused

Section G: Further details about the business and respondent

ASK ALL
G1. Does your business ….? READ OUT AND CODE ONE FOR EACH

		Yes	No	Don't know
A	Have a website	**1**	**2**	**3**
B	Have a business email address	**1**	**2**	**3**
C	Have social media accounts (e.g. Twitter / Facebook)	**1**	**2**	**3**
D	IF YES TO G1A: Serve customers directly via your website (i.e. have an e-commerce element to the business)	**1**	**2**	**3**
E	Serve customers via the Internet using a third party website	**1**	**2**	**3**
F	Have computer systems software to manage operational aspects of the business (e.g. stock levels, ordering, supply chain)	**1**	**2**	**3**
G	Have computer systems / software to manage the business staffing	**1**	**2**	**3**
H	Have computer systems / software to manage the finances of the business	**1**	**2**	**3**

Section H: Consent questions

ASK ALL
H1. The Food Standards Agency may want to further explore the views of businesses like yours in more detail and follow up on some of the issues highlighted in this survey. Would you be willing to take part in a more in depth interview at a later date?

1 Yes
2 No
3 Maybe

If willing to take part, collect telephone number and email address

ASK ALL
H2. Would you be happy for us to pass back your comments to the Food Standards Agency with your organisation's name attached?

1 Yes
2 No

THANK AND CLOSE

Appendix IV: 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

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With more than 25 years' experience, BMG Research has established a strong reputation for delivering high quality research and consultancy.

BMG serves both the public and the private sector, providing market and customer insight which is vital in the development of plans, the support of campaigns and the evaluation of performance.

Innovation and development is very much at the heart of our business, and considerable attention is paid to the utilisation of the most up to date technologies and information systems to ensure that market and customer intelligence is widely shared.