

AHEAD OF WHAT'S NEXT.

FSA baseline study with SME food businesses

March 2015

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**Food
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Background

The FSA needed to conduct a research study amongst SME food businesses to measure awareness of and compliance with food safety guidelines and regulations.

The purpose of this initial wave was to set a baseline that measures KPIs and attitudes of SME food businesses which can be monitored over time.

The study has gained insight from a total of 252 SME FBOs: 100 across England, 102 in Wales and 50 in Northern Ireland. The exact quotas by outlet type are shown in the grid to the right. The sample specification was based on the one used in the FSA research project 'Evaluation of Safer Food Better Business Packs'.

| | Total | England | Wales | Northern Ireland |
|-------------------------|------------|------------|------------|------------------|
| Café/snack bar/tea room | 51 | 21 | 20 | 10 |
| Caterer | 11 | 5 | 4 | 2 |
| Catering – mobile | 31 | 12 | 13 | 6 |
| Fish and chip shop | 17 | 6 | 7 | 4 |
| Guest house | 7 | 2 | 3 | 2 |
| Hotel | 6 | 3 | 2 | 1 |
| Pub/bar/inn | 22 | 8 | 10 | 4 |
| Restaurant | 86 | 34 | 35 | 17 |
| Take away food shop | 21 | 9 | 8 | 4 |
| TOTAL | 252 | 100 | 102 | 50 |

Methodology



The survey was conducted with owners and decision makers in small to medium sized food businesses using face to face interviewers and a pen and paper questionnaire – this methodology was chosen as it is a good way to get respondent engagement and buy-in to the interview process. The interviewer is also able to take photos and note whether FHRS stickers are displayed. Responses were captured as the interview took place.

The interviews were conducted in a range of locations as listed below.

| England | | Wales | | Northern Ireland | |
|--------------------------|------------|--------------|------------|--|-----------|
| Bromley | 10 | Cardiff | 20 | Belfast, Lisburn, Carrick Fergus, Bangor | 30 |
| London | 10 | Swansea | 20 | Ballymena | 10 |
| Leeds | 10 | Newport | 10 | Londonderry | 10 |
| Cramlington | 10 | Camarthen | 10 | | |
| Wallingford, Oxfordshire | 10 | Rhyl | 14 | | |
| Solihull | 10 | Conway | 13 | | |
| Nottingham | 10 | Wrexham | 15 | | |
| Stalybridge | 10 | | | | |
| Manchester | 10 | | | | |
| Bristol | 10 | | | | |
| TOTAL | 100 | TOTAL | 102 | TOTAL | 50 |

About this report

Throughout this report, data has been significance tested at 95% confidence levels. Any statistical difference between the 'total level data' (which is the total of all three nations combined) and the individual countries (England, Wales and Northern Ireland) have been marked with a green or red arrow. A key is available on each slide where differences are marked.

  Arrows indicate significant difference between country and total level data.
Green arrow = sig. higher than Total. Red arrow = sig. lower than Total

Country level data is colour coded throughout for ease of reading. **Red** denotes **England**, **green** for **Wales** and **purple** for **Northern Ireland**. **Total** level data is generally displayed in **blue** but is clearly marked on slides where this is not the case.

Total

England

Wales

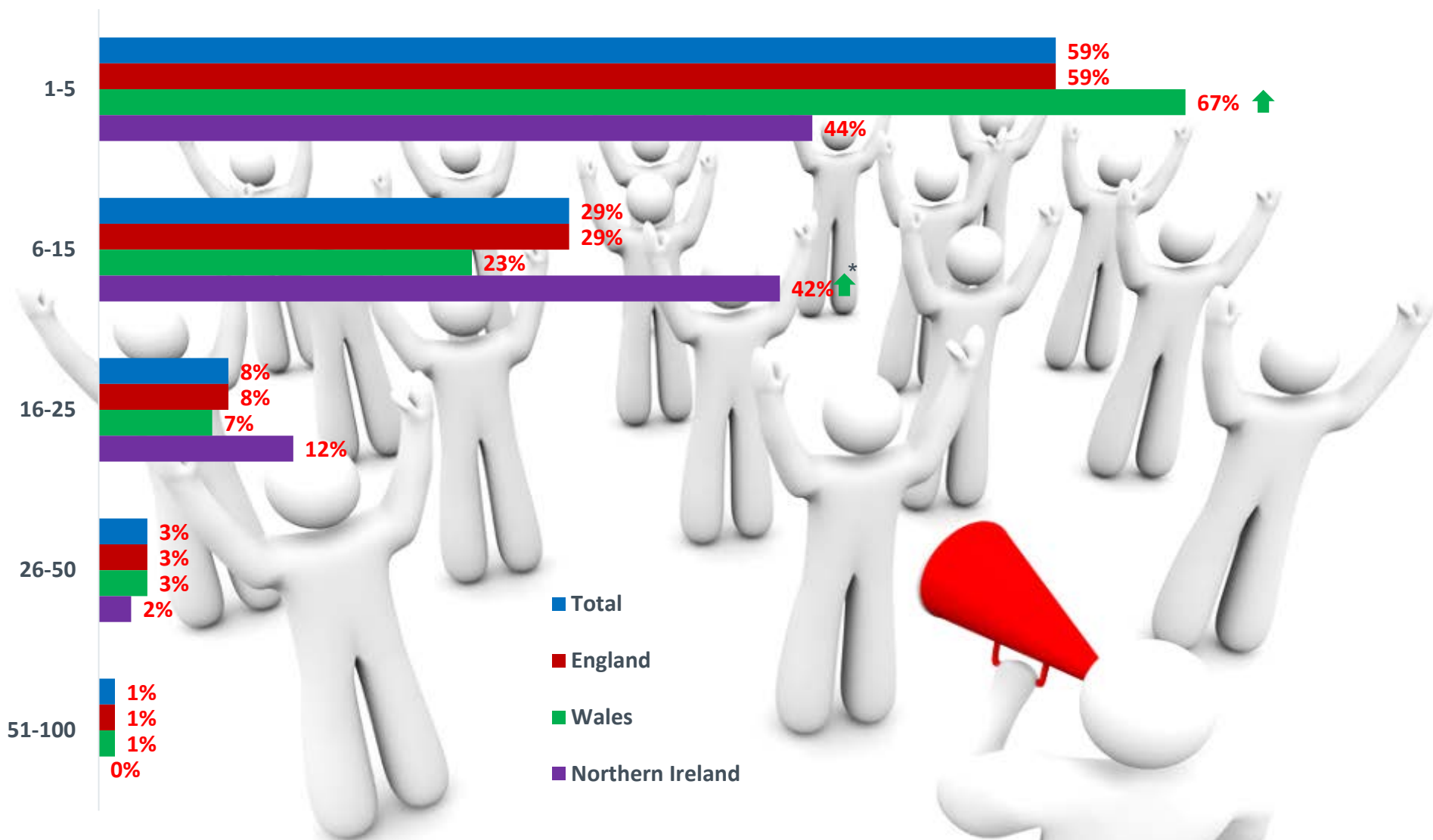
Northern Ireland



Sample profile

SME Profiling : Number of Employees

The majority of businesses interviewed employed under 16 members of staff





↑ ↓ Arrows indicate significant difference between country and total level data.
Green arrow = sig. higher than Total. Red arrow = sig. lower than Total

SQ2a. How many employees do you have at this site?
Base: 252, (England 100, Wales 102, Northern Ireland 50)
* Caution, Base is less than 50

SME Profiling : Number of sites and seating capacity

Most businesses had just one site

| | Total | England | Wales | Northern Ireland |
|-------------------------|-------|---------|-------|------------------|
| Number of sites | | | | |
| 1 | 92% | 94% | 87% | 96% |
| 2-5 | 7% | 3% | 12% ↑ | 4% |
| Seating Capacity | | | | |
| 0 | 24% | 27% | 18% | 32% |
| 1-15 | 10% | 10% | 12% | 4% |
| 16-25 | 10% | 6% | 12% | 14% |
| 26-40 | 18% | 19% | 23% | 8% |
| 41-60 | 17% | 15% | 19% | 20% ↑* |
| 61-80 | 12% | 10% | 9% | 20% |
| 81-100 | 4% | 5% | 3% | 2% |
| 100+ | 5% | 6% | 6% | - |



 Arrows indicate significant difference between country and total level data.
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SQ2b. How many sites do this food business operate?
 SQ3. What is your seating capacity here?
 Base: 252, (England 100, Wales 102, Northern Ireland 50)
 * Caution, base is less than 50

SME Profiling : FHRs rating

The FHRs profile was broadly in line with the national figures

| FHRs Ratings of SMEs who took part in the survey | | | |
|--|---------|-------|------------------|
| Total | England | Wales | Northern Ireland |
| 43% | 46% | 51% | 22% |
| 25% | 29% | 22% | 26% |
| 14% | 9% | 12% | 30% |
| 2% | 1% | 3% | 4% |
| 2% | 2% | 3% | - |
| 13% | 13% | 10% | 18% |



Awaiting Inspection/
not rated/ not sure

| FHRs Ratings for food businesses in England, Wales and Northern Ireland | |
|---|-----|
| National Distribution of Scores <i>(from FSA website)</i> | |
| | 54% |
| | 20% |
| | 11% |
| | 3% |
| | 3% |
| | 9% |

Source: FSA website March 2015



Executive summary

Executive summary

- Attitudes to food hygiene and safety regulations are positive overall.
 - 98% agree that ‘good food hygiene is good for business’ and that ‘food hygiene matters to their customers’.

We do however see 20% who say they run out of time to complete their SFBB diary sheets and 24% agree that it is too time consuming to keep up to date with changes in regulations.
- With regards to allergens regulations (EU FIC), attitudes are mostly positive but with some challenges.
 - Respondents are largely compliant with keeping allergen information up to date (71%).
 - 45% feel it is challenging to monitor every allergen in the food they provide.
 - Allergens were the most mentioned new food regulation respondents had heard of in the past 6 months (56%).
- SME FBOs are largely confident that they can find and access the information they need on food safety and hygiene regulations (86%).
 - However, 35% agree they would like more help and information on what to do.
- The majority (90%) offer staff training and keep them up to date on changes to regulations.
 - 23% have had feedback from their staff which has been largely been positive.

Executive summary

- The majority claim to use the materials provided by the FSA (88%).
 - 83% display their FHRS sticker in a window/door and 48% display it on a wall/counter.
 - Of those who do not use the materials, the most stated reason was that they haven't got any or are still waiting to receive some.
 - 49% agree that customers look for the green and black FHRS sticker.
 - Only 16% said they see little value in displaying their rating sticker.
 - 63% know what their competitor's FHRS ratings are.
- The FSA website is thought of positively by SME FBOs overall.
 - It was the most stated source for accessing information about food hygiene and safety regulations (69%).
 - It is also the most stated source for hearing about new guidelines and regulations in the past 6 months (13%).
 - 96% stated the website was helpful or very helpful. When asked what makes it helpful, respondents stated they find it clear, concise, easy to access and informative.
 - Of those who had visited the FSA website in the past 6 months (54% of total), 81% said they found it helpful, 69% said it was informative and only 8% said it was difficult to understand.
- SFBB packs and local authority/council websites were rated highly for being clear, concise and informative (40%, 42% respectively).

Executive summary

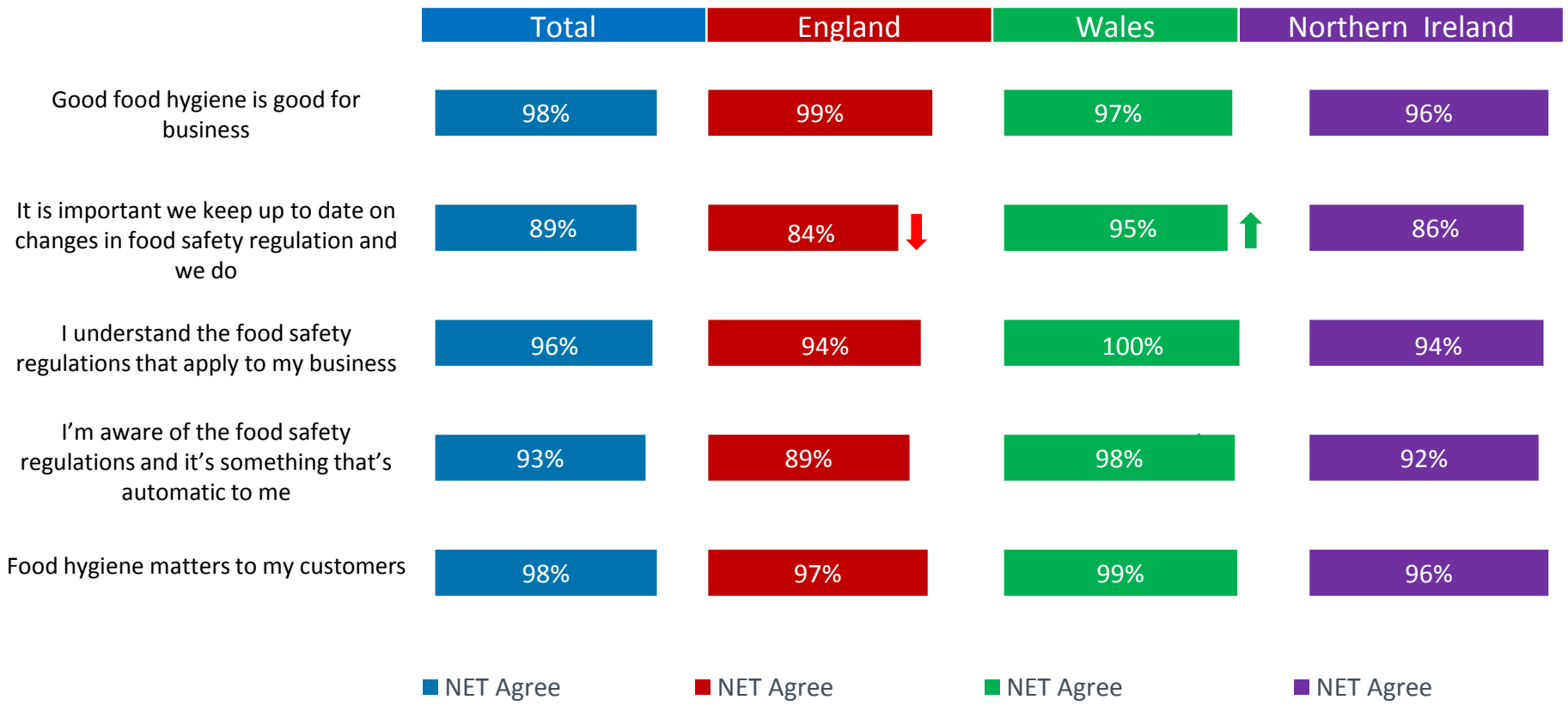
- Perceptions of the FSA were largely positive.
 - 87% stated the FSA is trustworthy, honest and reliable.
 - 73% agree that FSA makes legislation changes clear to businesses.
 - 73% say they get the information they need to run their business with good food hygiene standards
 - 22% have tried to contact the FSA in the past 6 months; the most common reason for contacting was to query or check their understanding of regulations.
 - 55% said they would prefer to receive a leaflet from the FSA about legislation changes and 40% would prefer an email.



Attitudes to regulations, compliance and sources of food hygiene and safety information

Knowledge and attitudes - positive statements

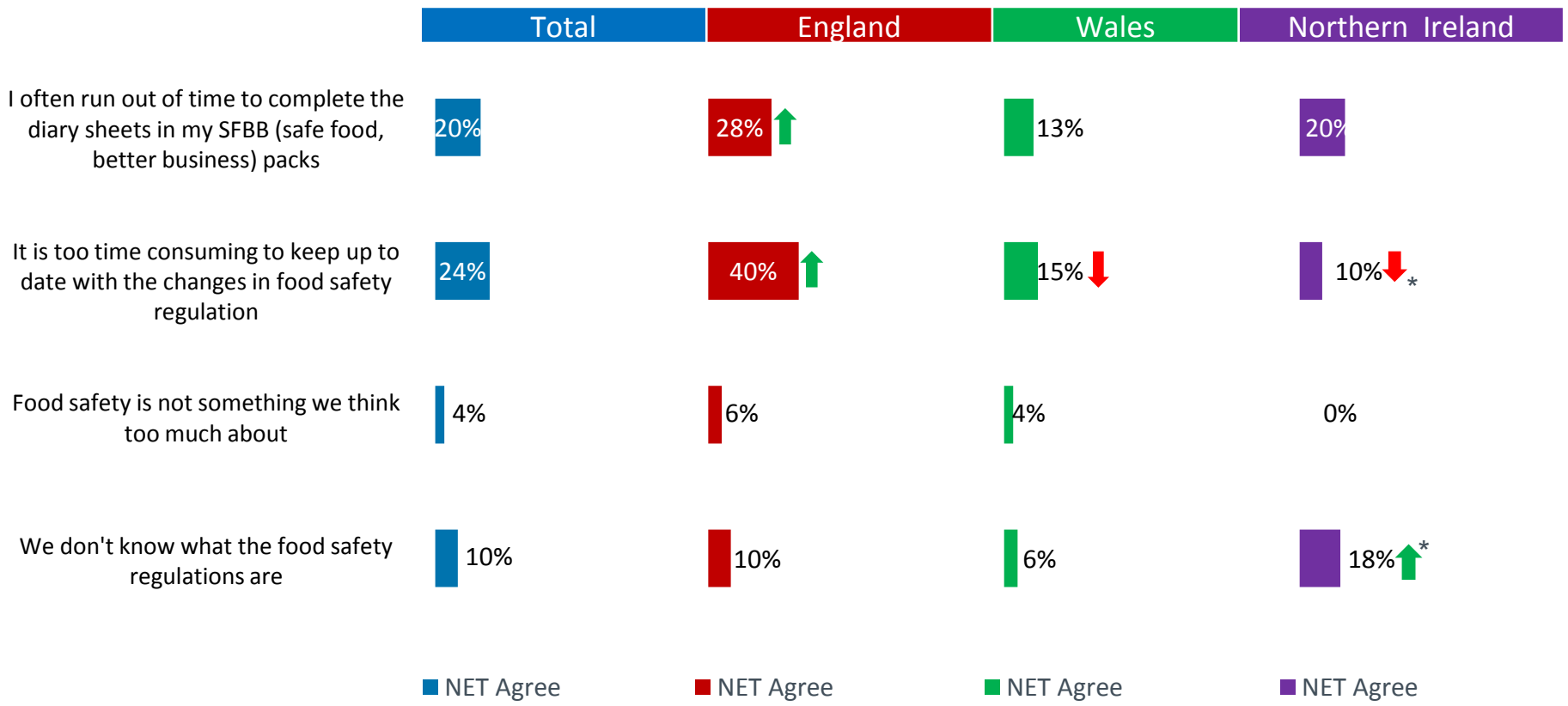
98% agree that 'good food hygiene is good for business' and that 'food hygiene matters to their customers'.





↑ ↓ Arrows indicate significant difference between country and total level data. Green arrow = sig. higher than Total. Red arrow = sig. lower than Total

Knowledge and attitudes - negative statements

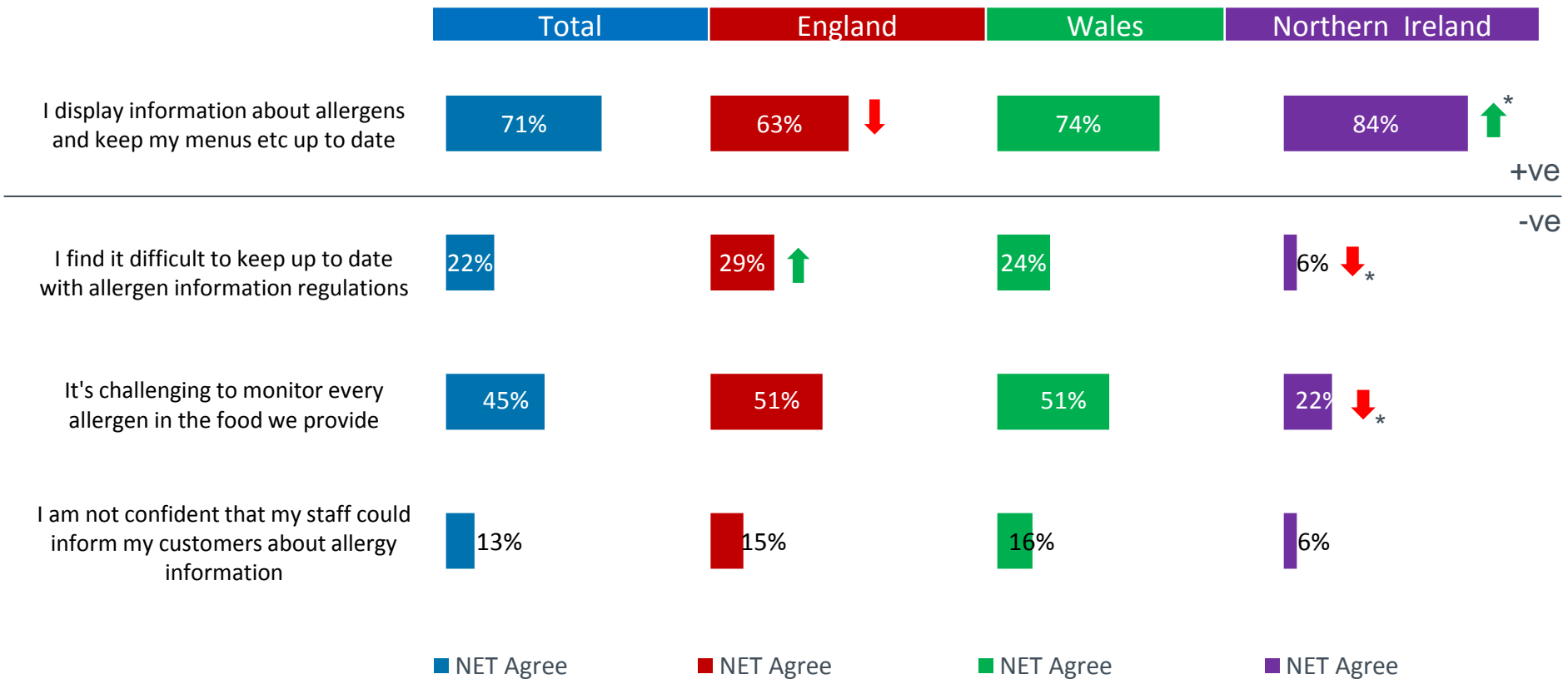
20% say they run out of time to complete their SFBB diary sheets. 24% agree it is too time consuming to keep up to date with changes in regulations.





 Arrows indicate significant difference between country and total level data. Green arrow = sig. higher than Total. Red arrow = sig. lower than Total

Allergens and regulations statements

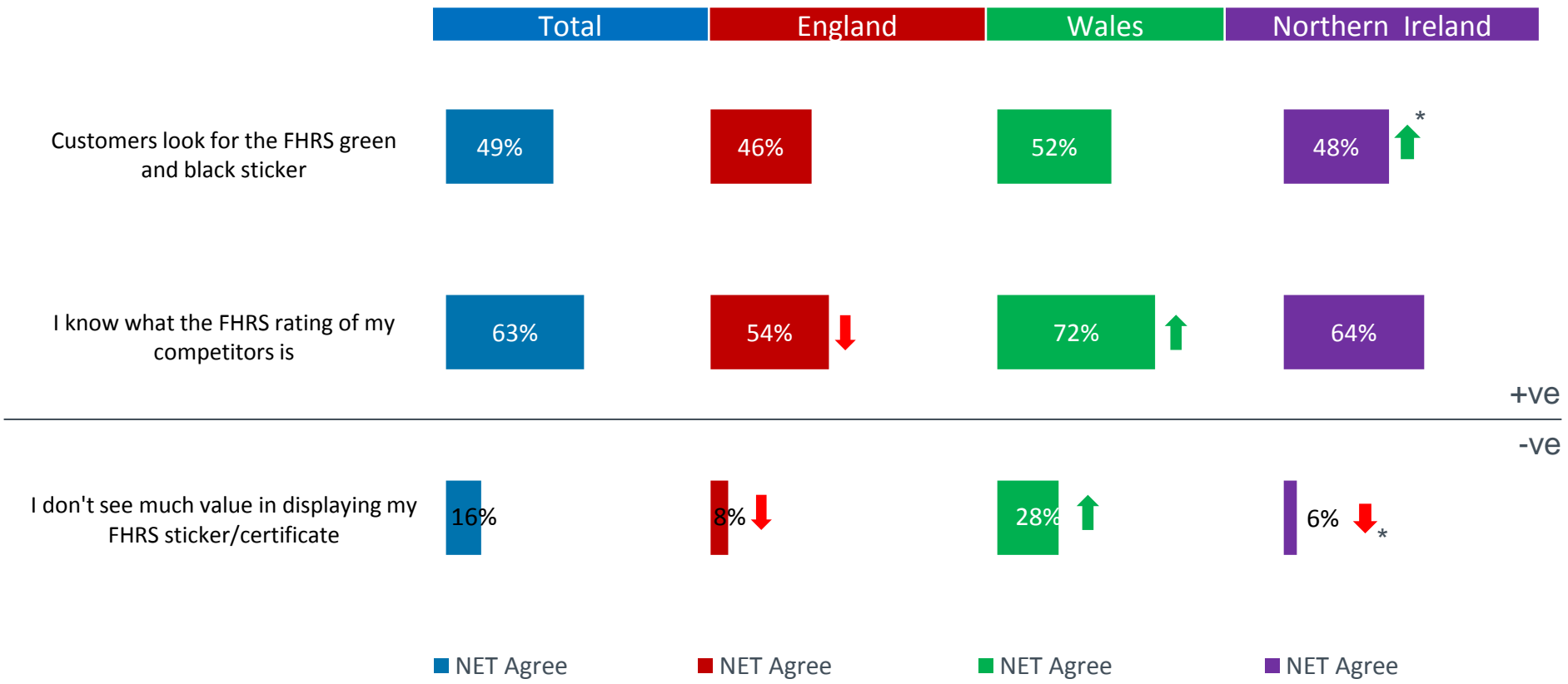
71% say they display allergen information and keep menus up to date. However 45% feel it is challenging to monitor every allergen in the food they provide.



↑ ↓ Arrows indicate significant difference between country and total level data. Green arrow = sig. higher than Total. Red arrow = sig. lower than Total

FHRS statements

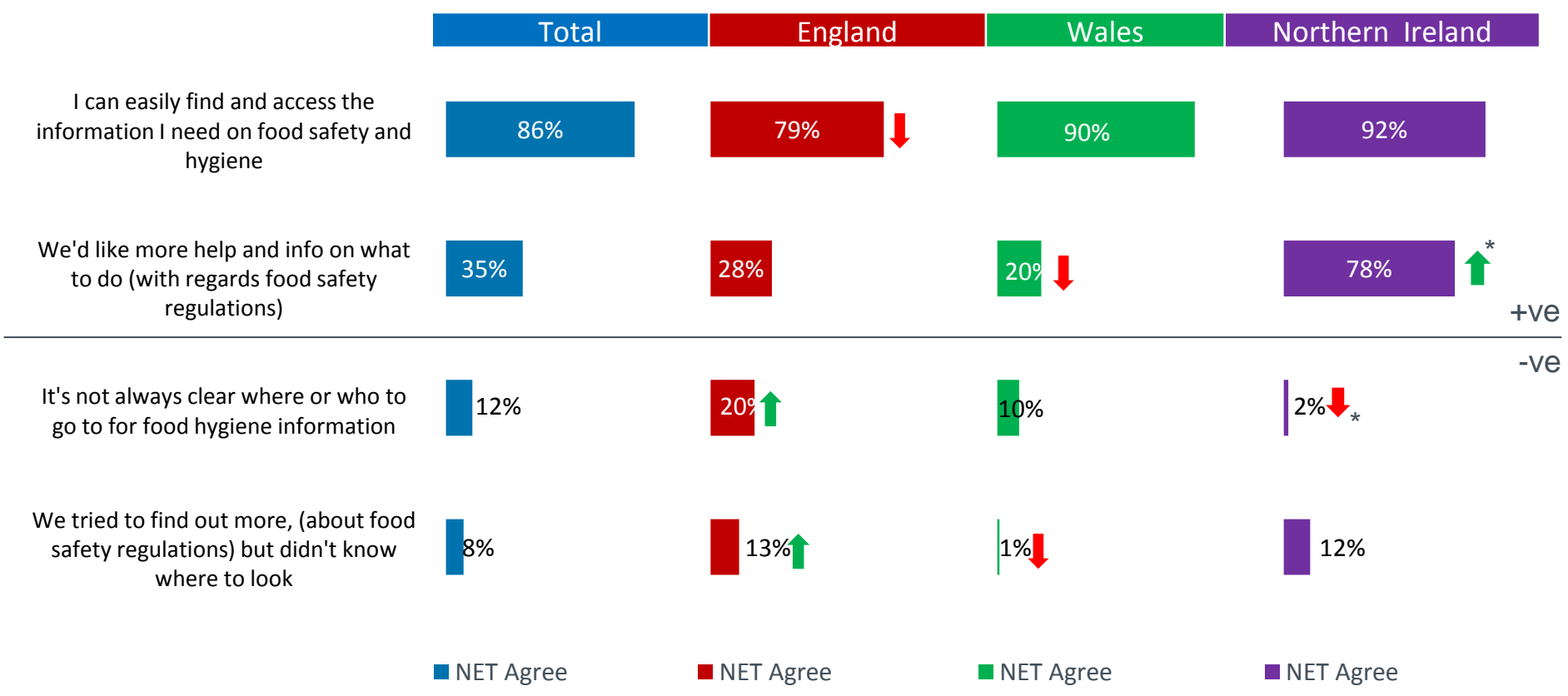
49% agree that customers look for the green and black FHRS sticker. 63% know what their competitor's FHRS rating are. Only 16% agreed that they see little value in displaying their FHRS rating.



↑ ↓ Arrows indicate significant difference between country and total level data. Green arrow = sig. higher than Total. Red arrow = sig. lower than Total

Accessing information statements

86% agree they can easily find and access the information they need. However 35% agreed they would like more help and information on what to do (with regards to food safety regulations).



+ve
-ve

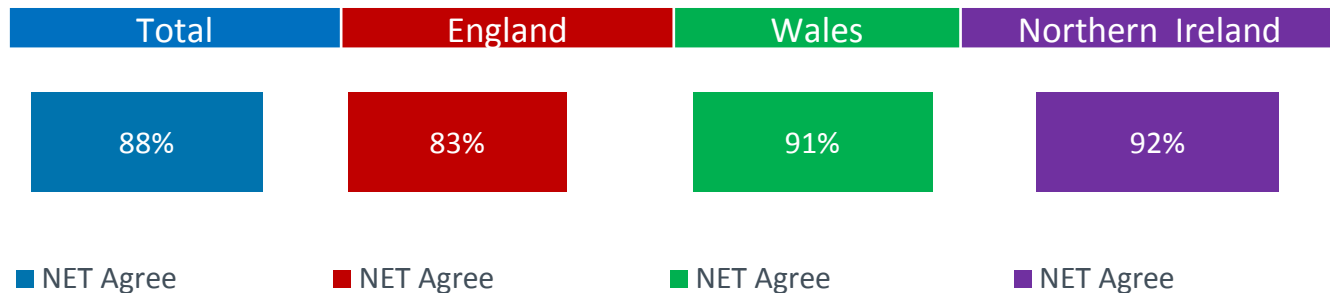
↑ ↓ Arrows indicate significant difference between country and total level data. Green arrow = sig. higher than Total. Red arrow = sig. lower than Total

MQ1e. To what extent do you agree or disagree with the following statements:
Base: 252, (England 100, Wales 102, Northern Ireland 50)
* Caution, base is less than 50

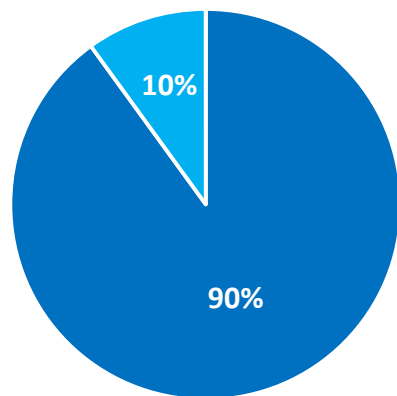
Staff competency and training

88% say their staff are trained on the latest regulations and they feel it is important they are kept up to date. 1 in 10 do not offer their staff training.

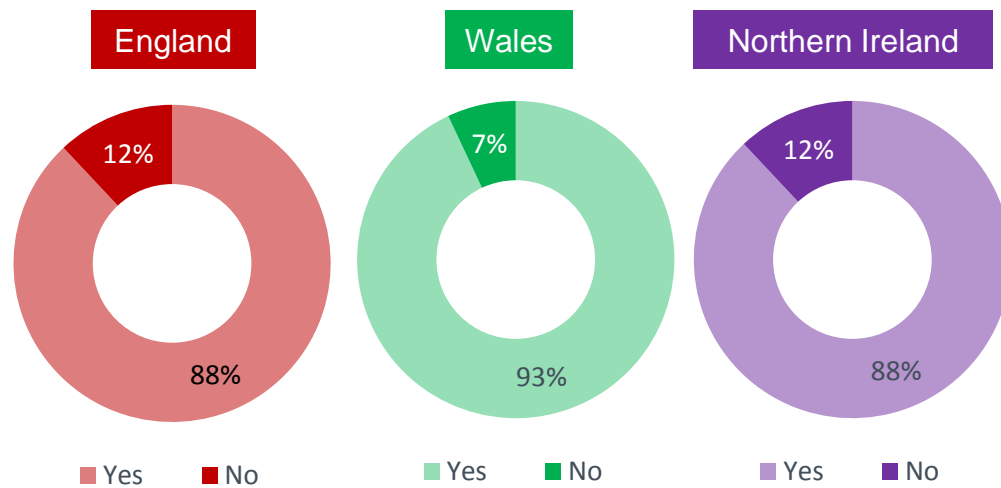
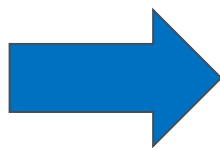
My staff are trained on the latest regulations and it's important that they are kept up to date on the changes



Do you offer training?



■ Yes ■ No



■ Yes ■ No

■ Yes ■ No

■ Yes ■ No

MQ1d. To what extent do you agree or disagree with the following statements:

Base: 252, (England 100, Wales 102, Northern Ireland 50)

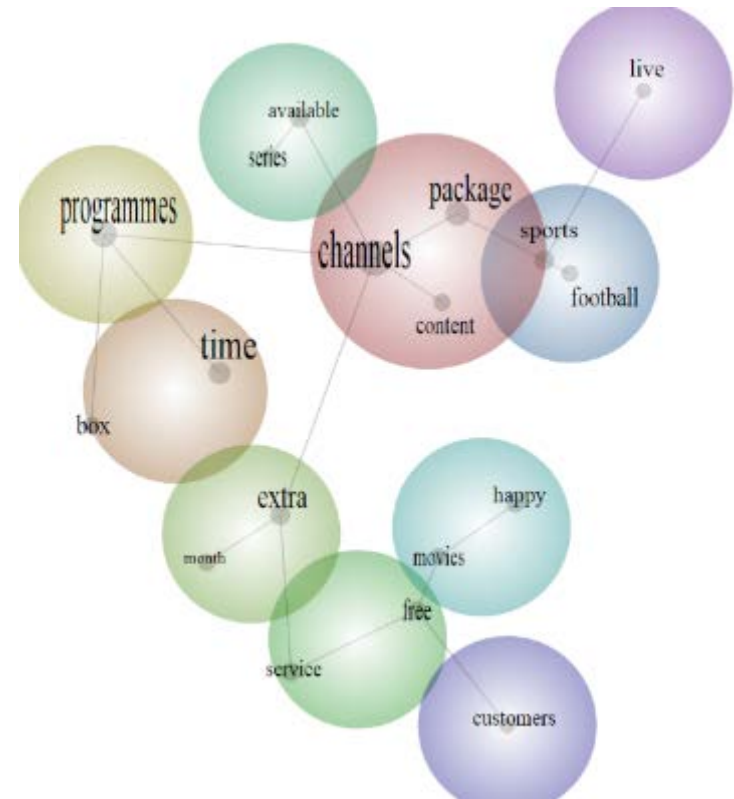
MQ6: Do you offer your employees training on food safety and hygiene regulations?

Base: 252, (England 100, Wales 102, Northern Ireland 50) NOTE: re-based to exclude 'not stated' responses.

How to interpret the verbatim analysis

Please see detailed information in the appendix on how this analysis is conducted

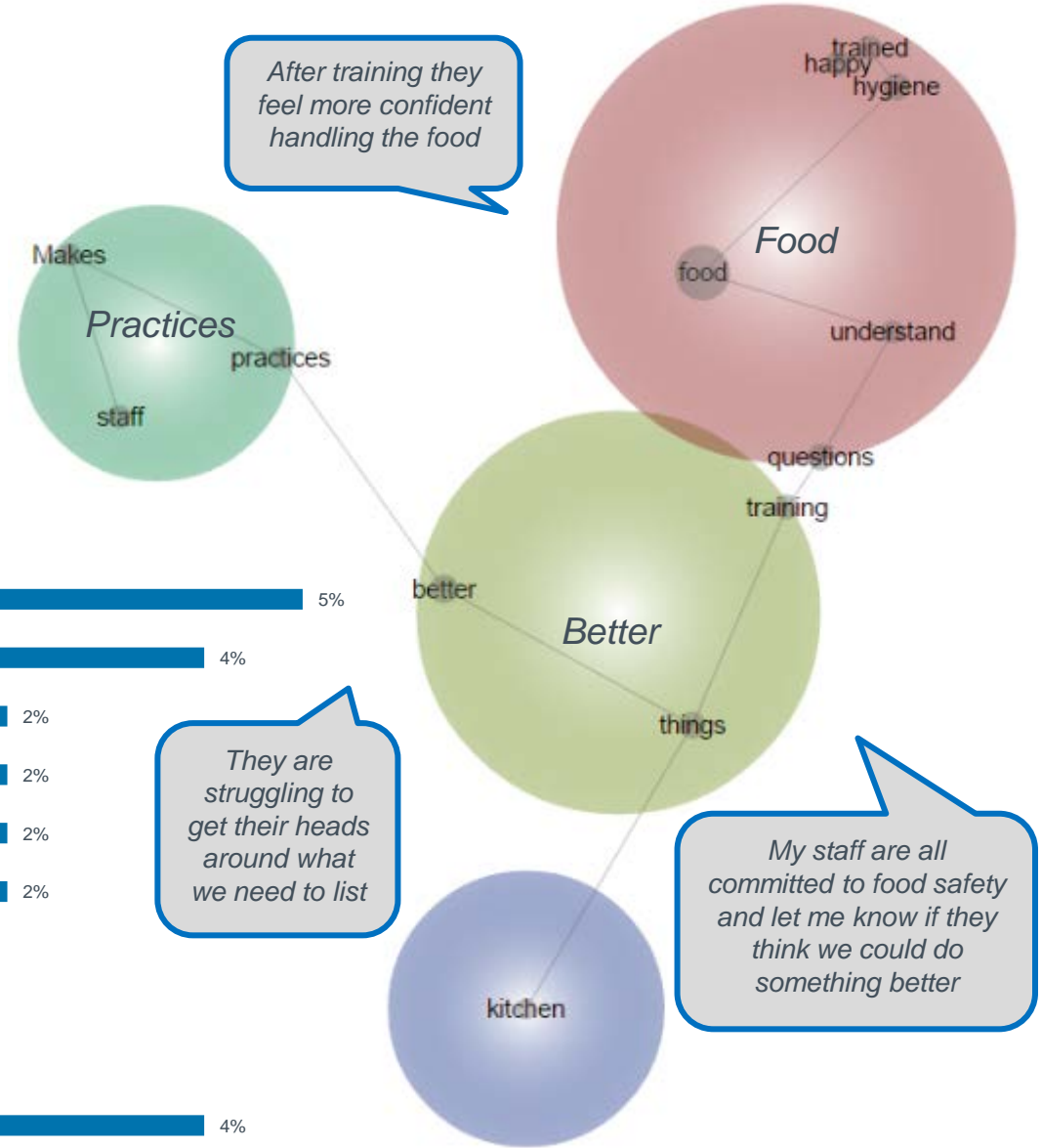
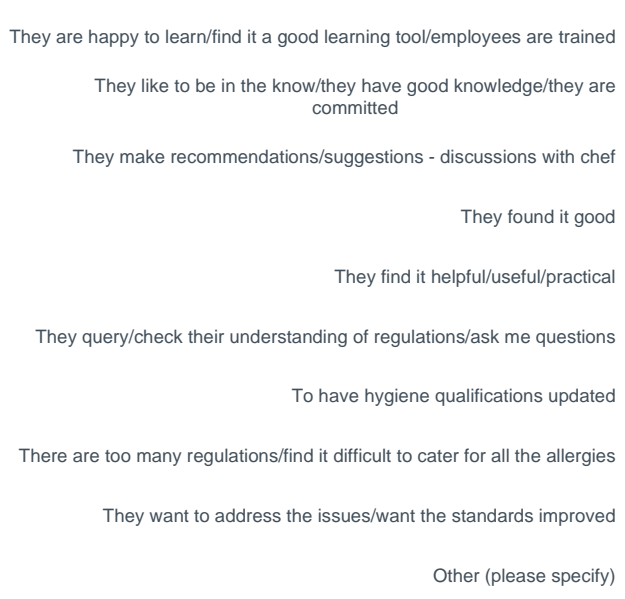
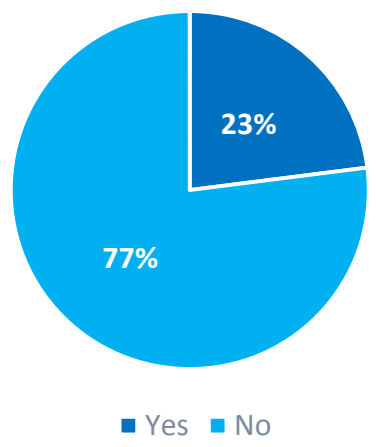
- Verbatim maps appear on the following slides, these maps are made up of:
 - **Concepts** – the grey dots within the large circles - the bigger the dot, the more times it is mentioned
 - **Themes** - the coloured circles, the “hotter” the colour the broader the theme (red/orange broader than blues/greens)
- Concepts that are positioned more closely together have a greater connection between them.



Employee feedback about food safety and hygiene regulations

23% have had feedback from staff about implementing food safety and hygiene regulations.

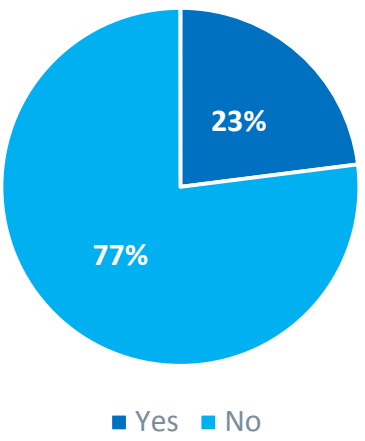
Have you had any feedback?



Employee feedback about food safety and hygiene regulations

23% have had feedback from staff about implementing food safety and hygiene regulations.

Have you had any feedback?

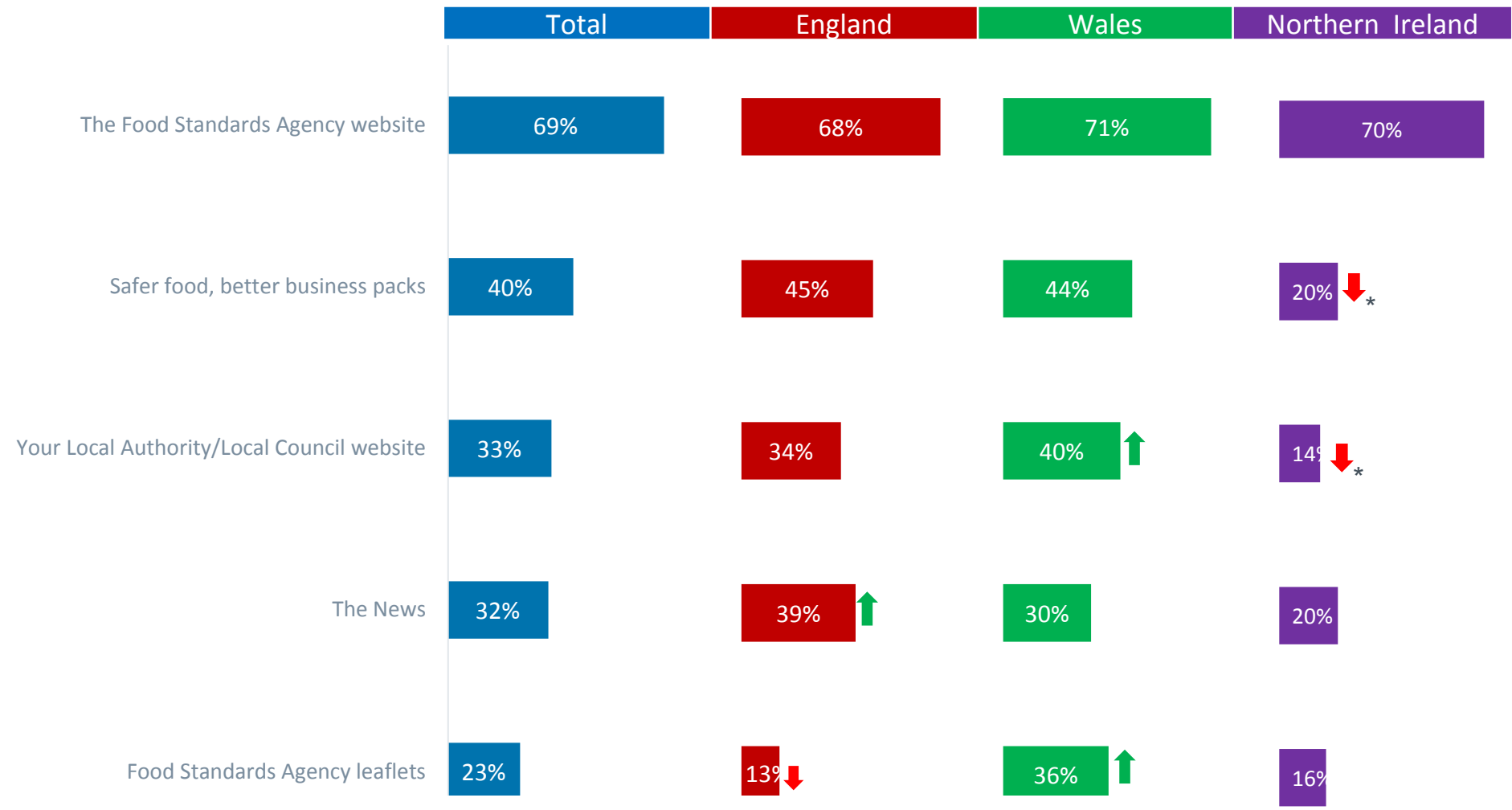




What their staff said about training



Sources used for accessing food safety guidelines and regulations

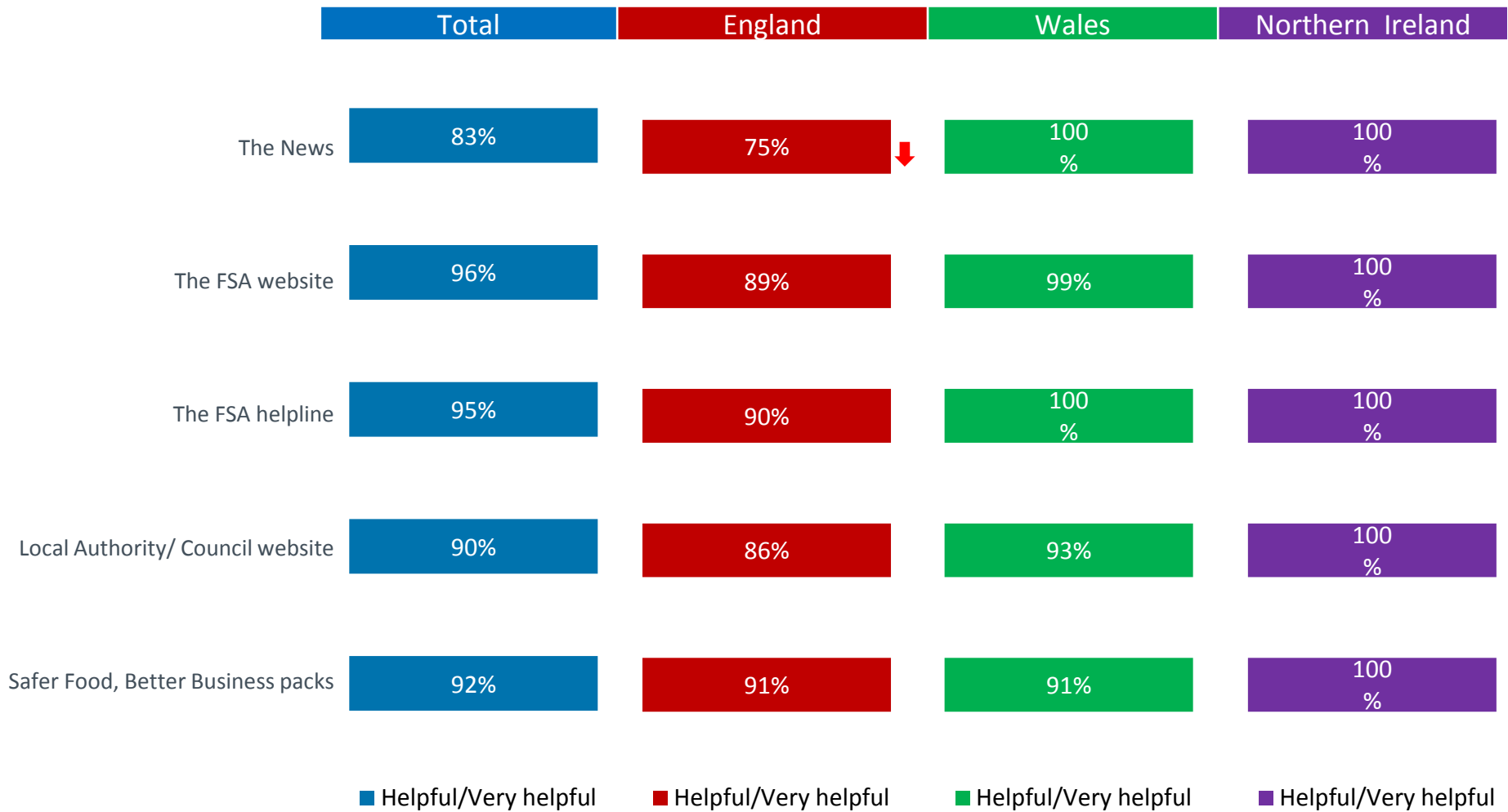
69% use the FSA website which is the most stated source for accessing information.







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Helpfulness of sources used for accessing food safety guidelines and regulations

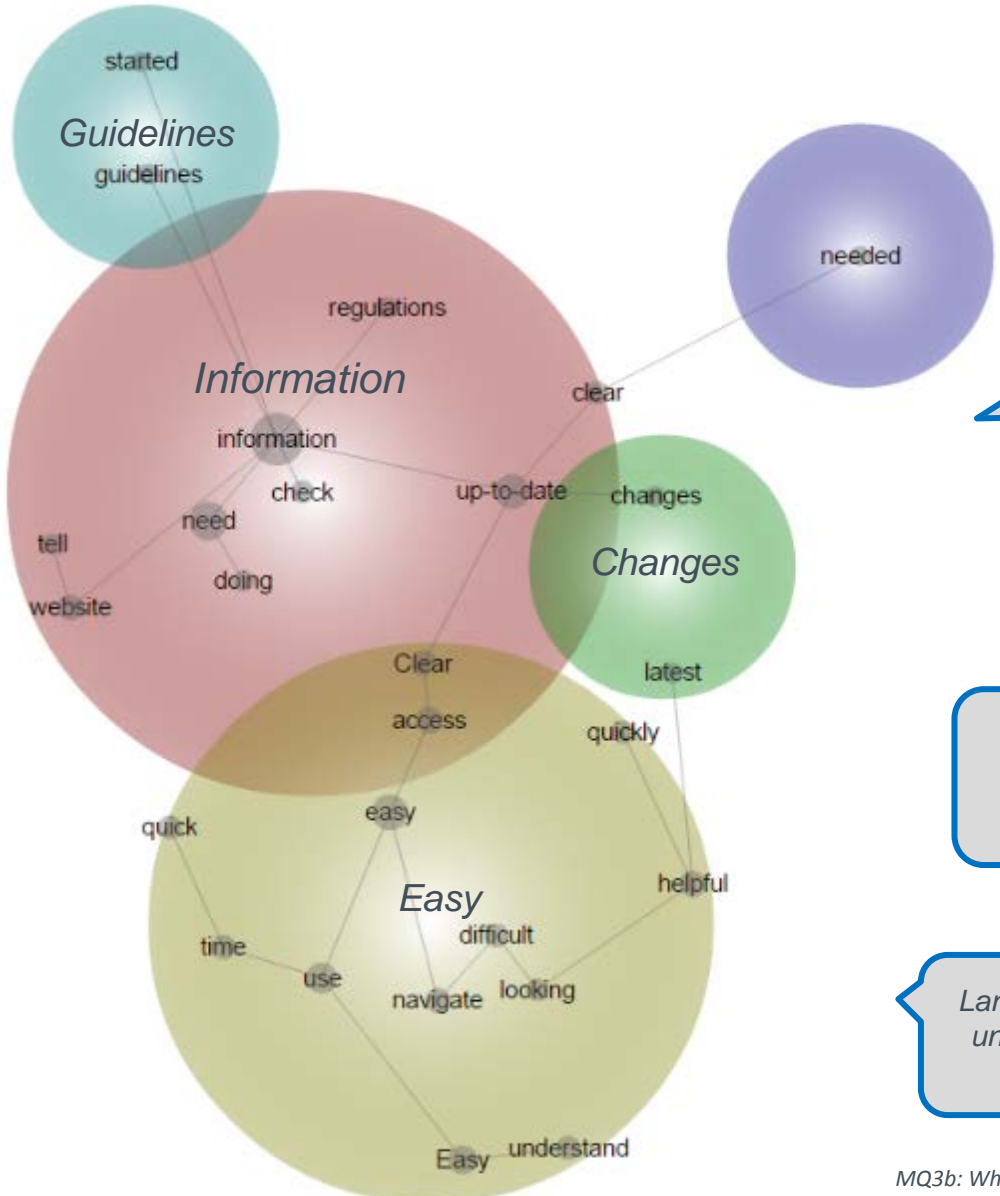
The FSA website is regarded as the most helpful overall with the largest number of respondents rating it as helpful or very helpful.





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Helpfulness of FSA sources

FSA sources (websites, leaflets and helpline) are viewed as informative and easy to access and navigate.



Gives us all the information we need

Can access anytime and has all the information we need

I don't need to go anywhere else for up-to-date information

Useful if I have a query and can't find on website

It is a 24 hour service, we work strange hours so suits me

If you phone them you get advice as soon as possible, helpful

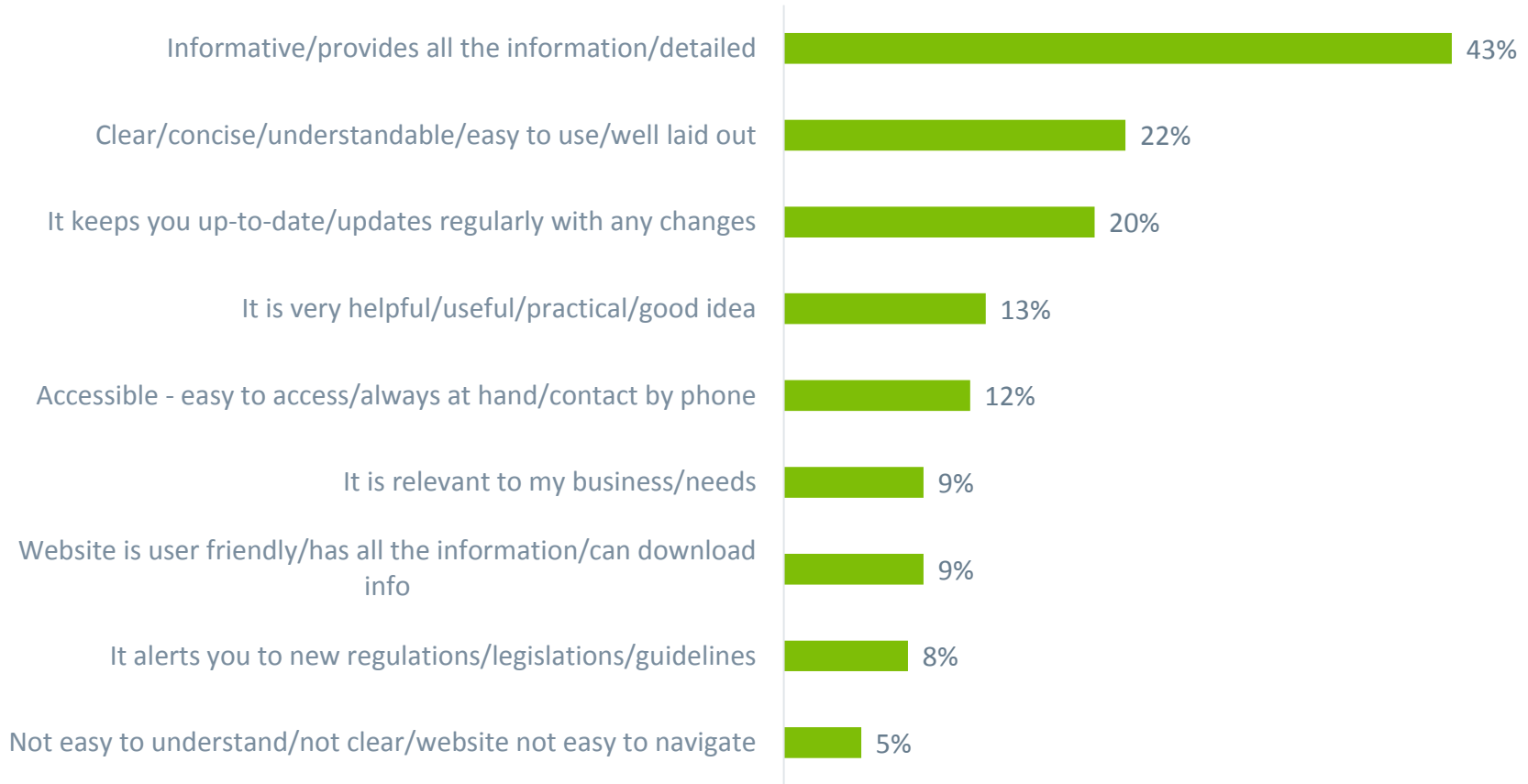
Language is difficult to understand, not very PC literate

Helpfulness of different sources of information

The FSA website is thought to be a clear and detailed source of information.

Total

FSA website

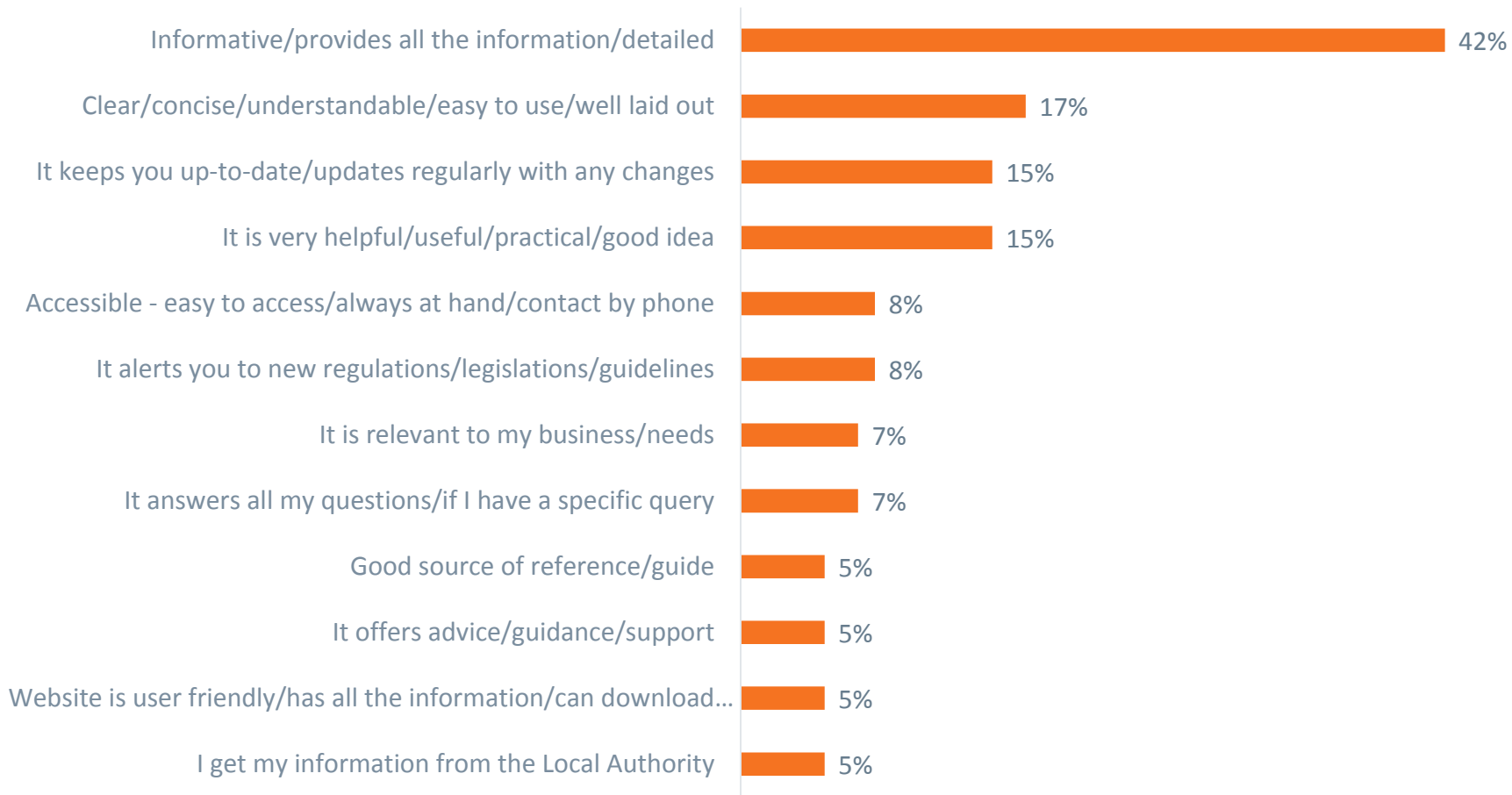


Helpfulness of different sources of information

Local authority/council websites are perceived as helpful, informative and detailed.

Total

Local Council/Authority website

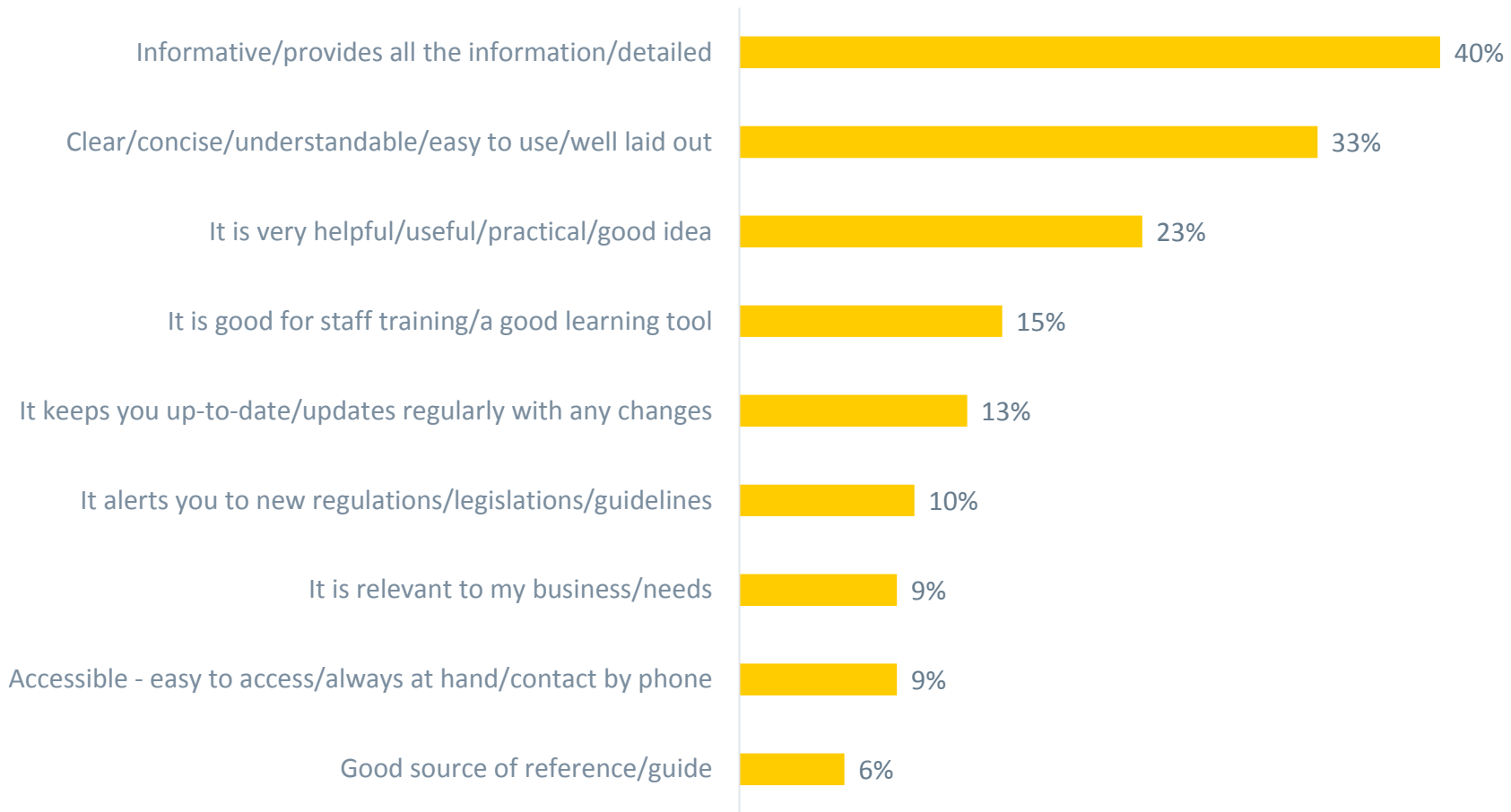


Helpfulness of different sources of information

Respondents think SFBB packs are informative, clear, concise and detailed.

Total

Safe food, better business packs

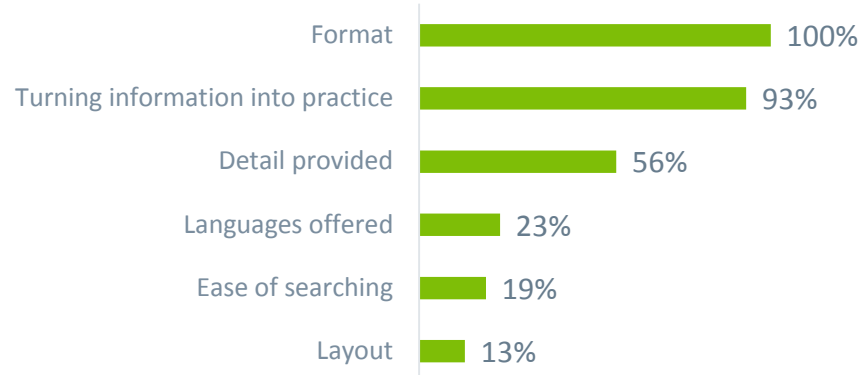


What is helpful about these sources of information?

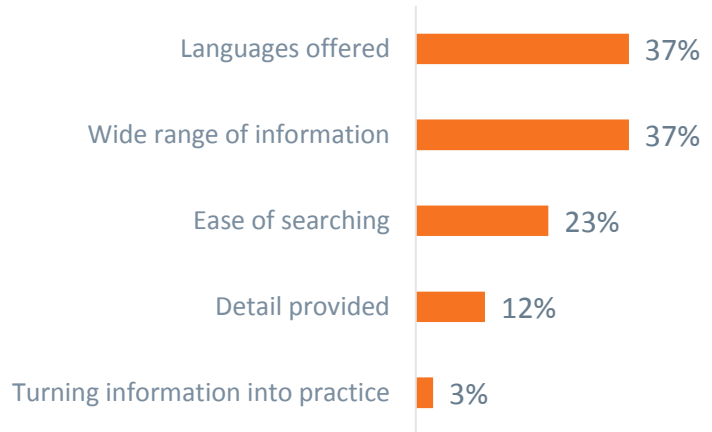
The format of the FSA website and information about putting regulations information into practice are regarded as the most helpful things about the FSA website.

All based on Total mentions

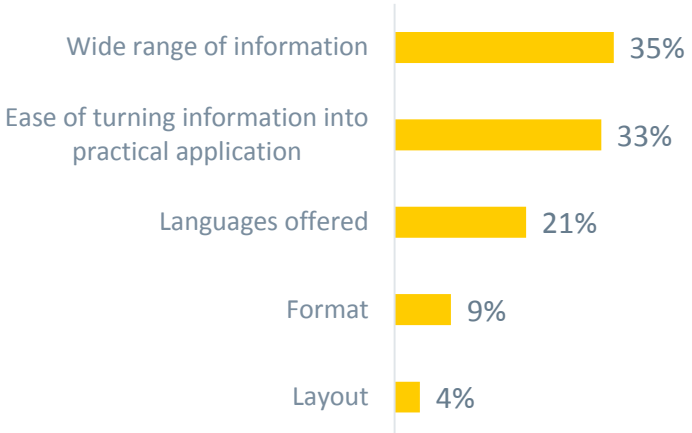
FSA website



Local Council/Authority website



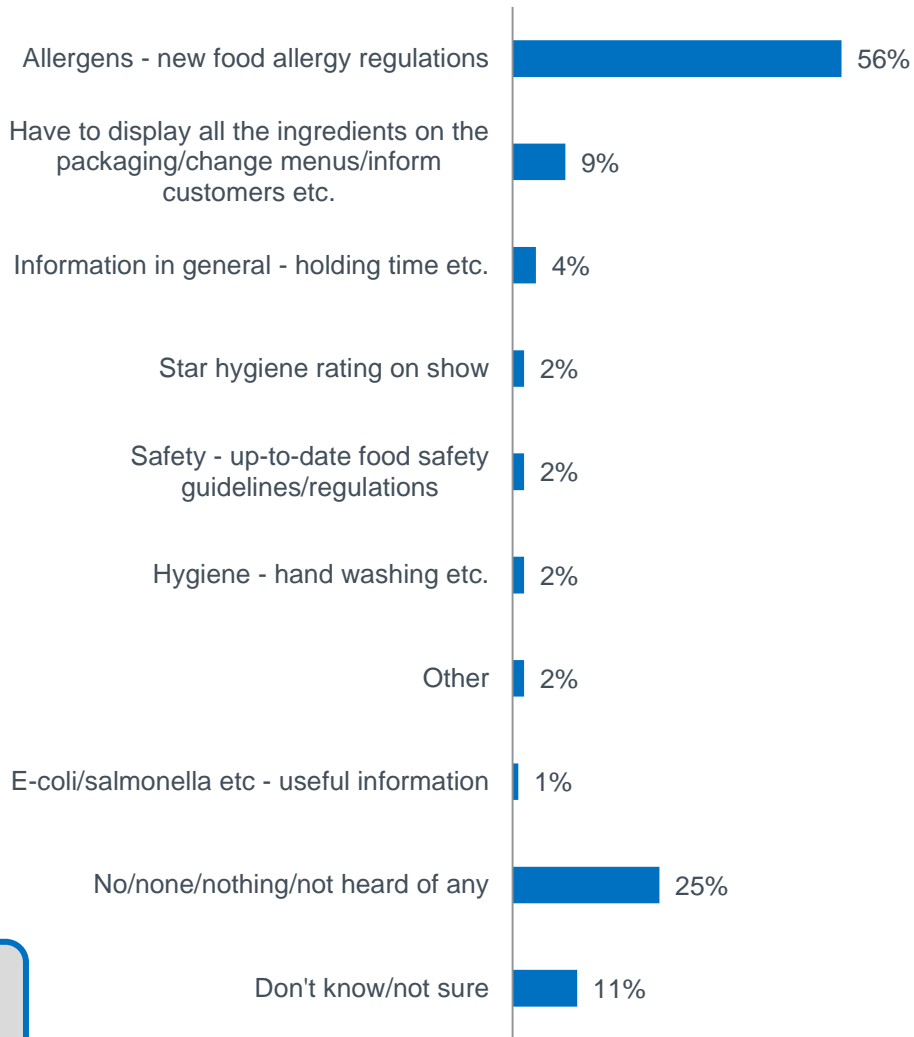
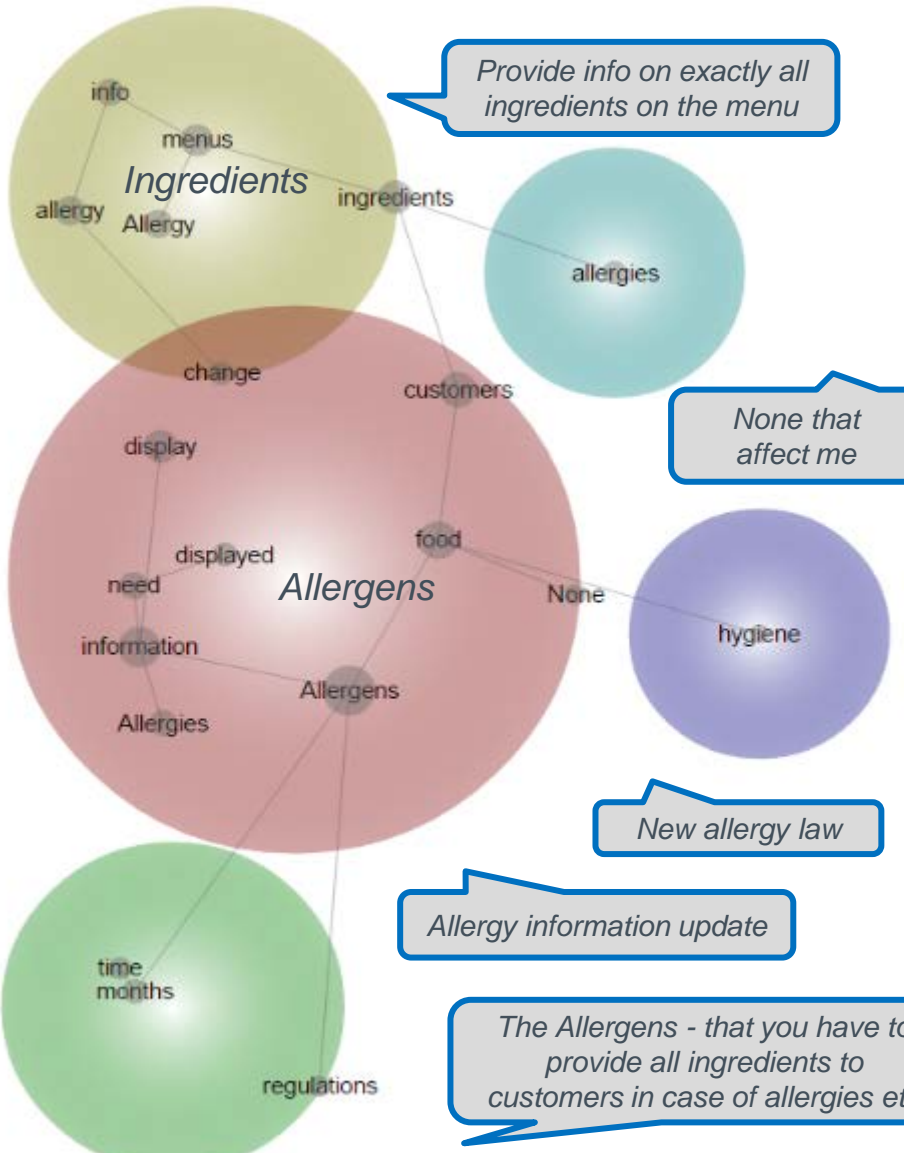
Safer food, better business packs



MQ4: Thinking about these same sources of information, do you find the below particularly helpful about each source? 30
Base: (60-158)

Which regulations have they heard about in the past 6 months

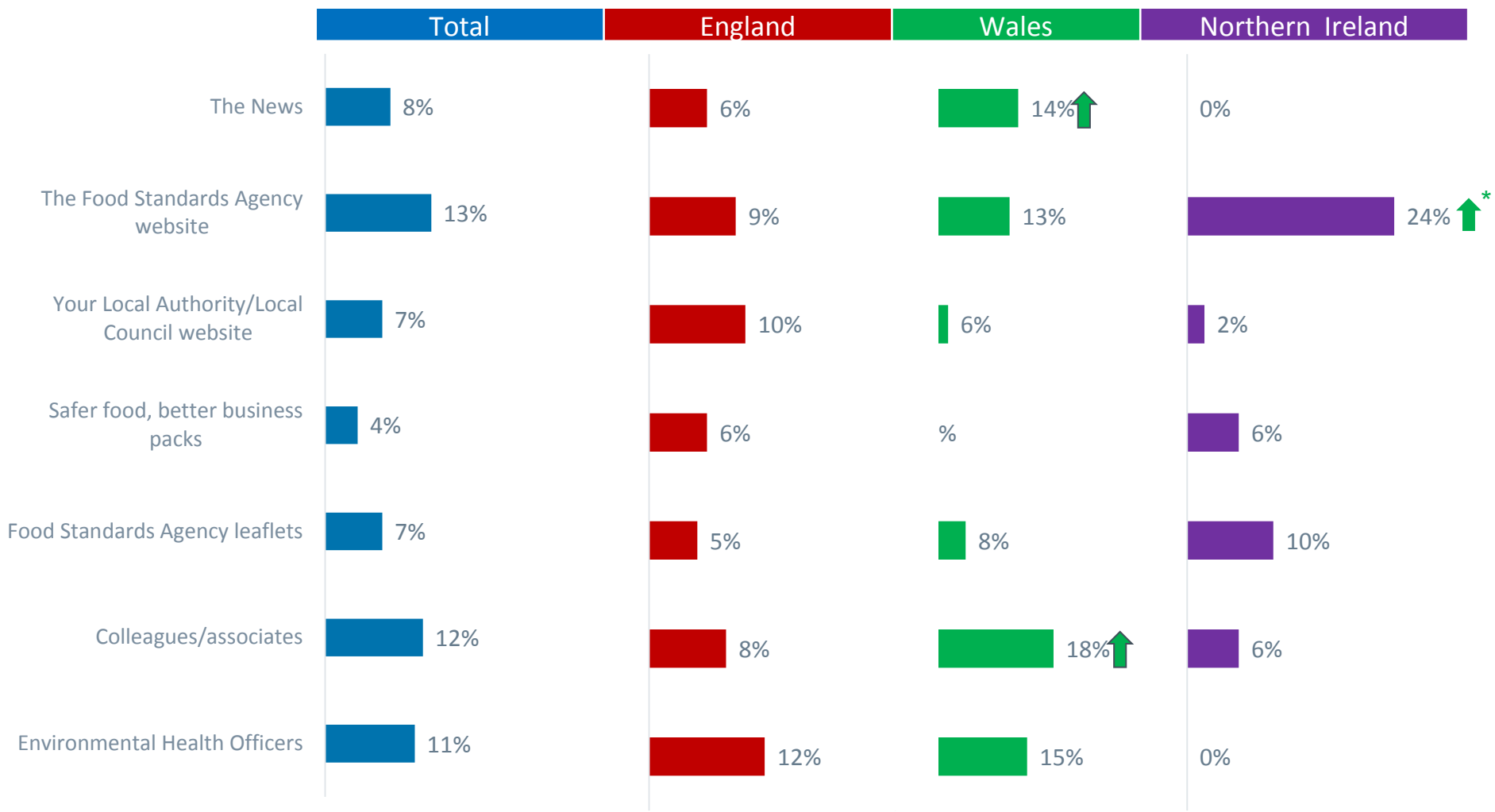
Allergen regulations were the most mentioned regulations/guidelines our respondents had heard of in the past 6 months. However, 25% could not recall any.





MQ5a: Which, if any, food safety guidelines and regulations have you heard about in the past 6 months? 31
 Base: (252); England (100), Wales (102), Northern Ireland (50)

How they heard about guidelines and regulations in the past 6 months

The FSA website was the most stated source for hearing about guidelines and regulations in the past 6 months



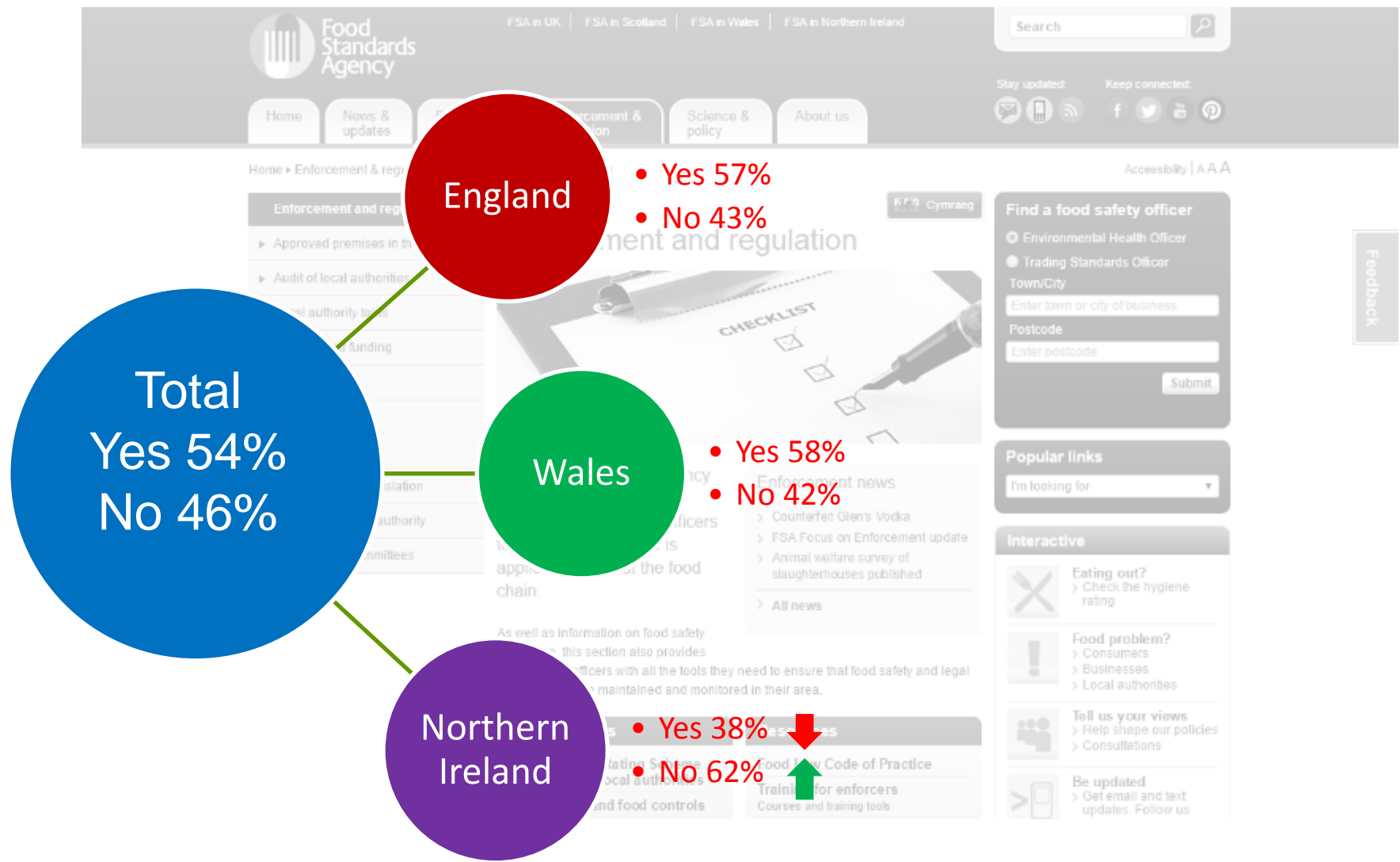


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Attitudes towards the Food Standards Agency



Have they visited the FSA website in the past 6 months?

54% have visited the FSA website. This was significantly lower amongst respondents in Northern Ireland (38%).





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How they found the FSA website when visiting - positives

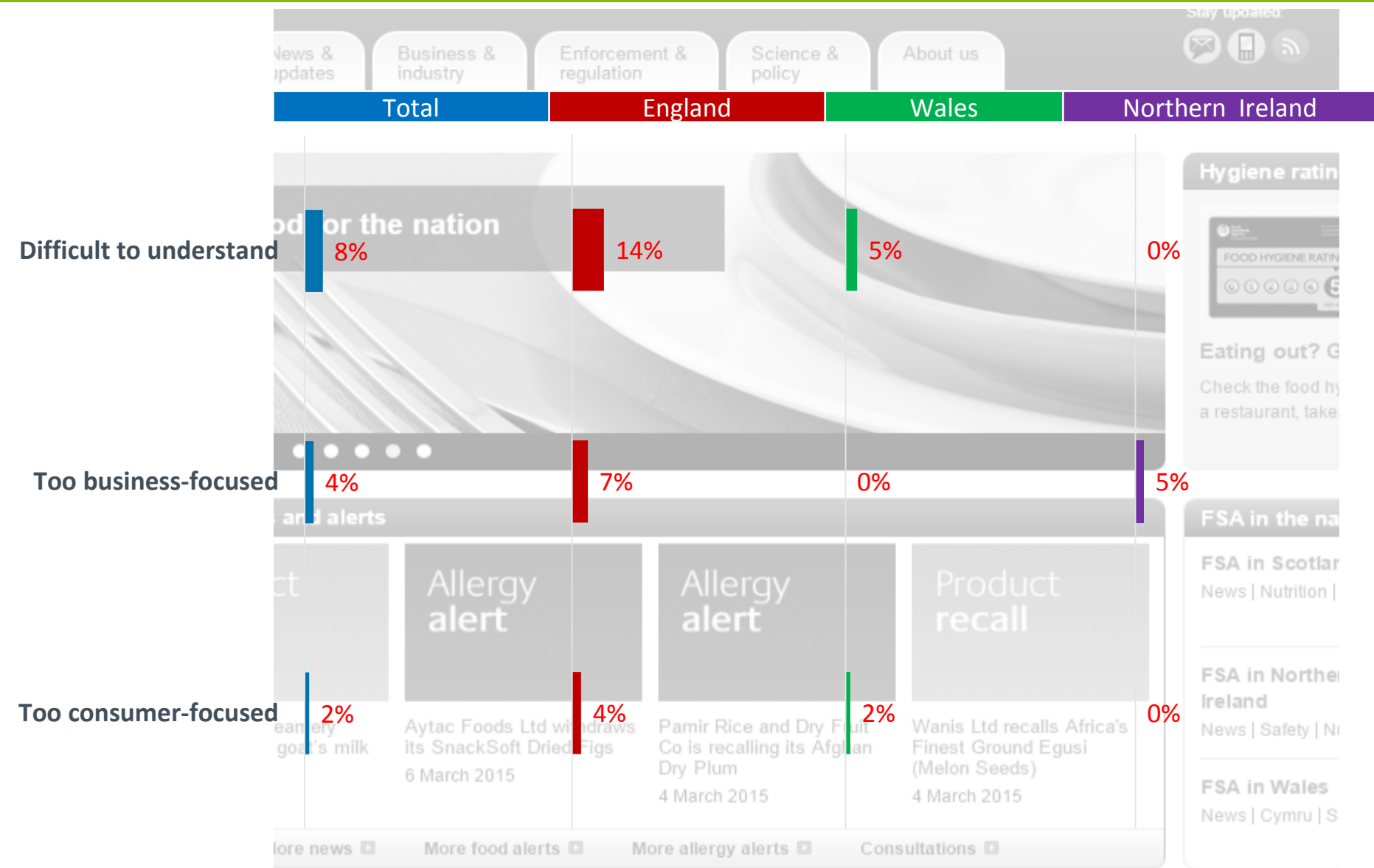
Of those who had visited the FSA website, 81% said they found it helpful.



MQ10: Did you find their website...
 Base: 135, (England 57, Wales 59, Northern Ireland 19)

How they found the FSA website when visiting - negatives

8% said they found the FSA website difficult to understand.



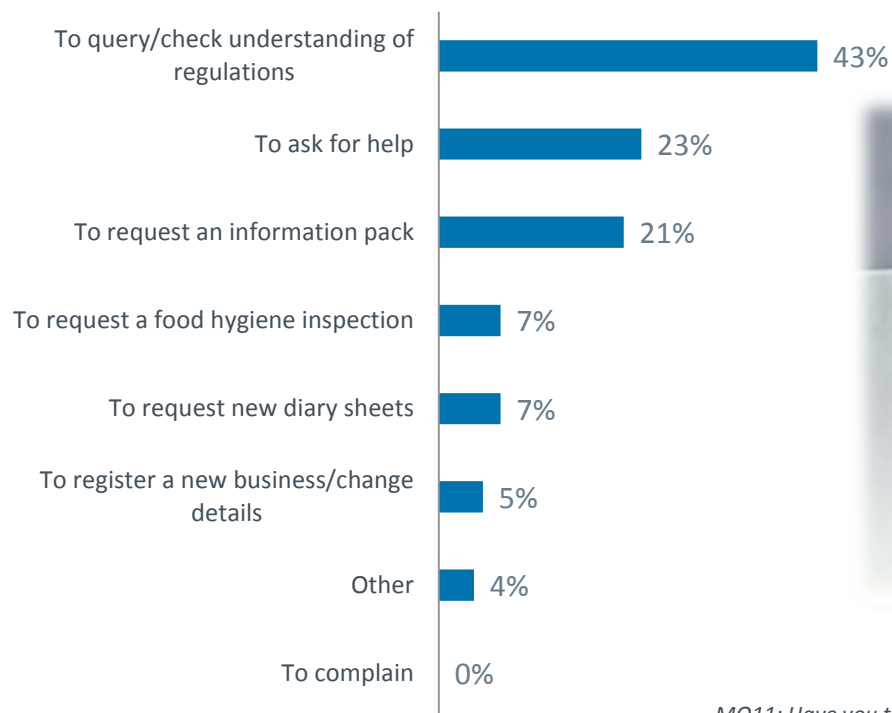
Have they tried to contact FSA in past 6 months and why?

22% have tried to contact the FSA in the past 6 months. The most common reason for contact was to query or check their understanding of regulations.

Percentage of people who have tried to contact the FSA in the last 6 months



Reason for contact

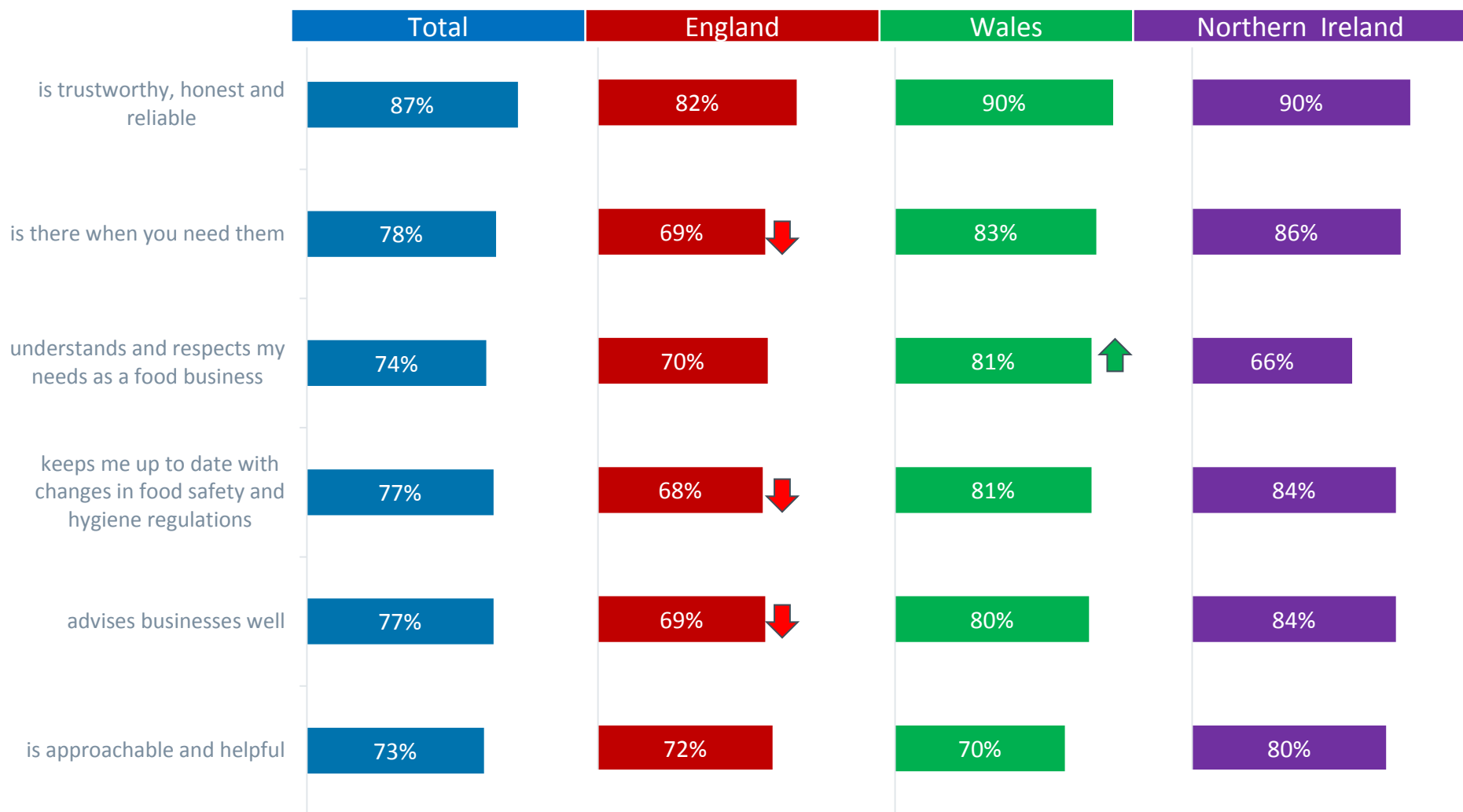


MQ11: Have you tried to get in contact with the Food Standards Agency in the past 6 months
Base: (252); England (100), Wales (102), Northern Ireland (50)

MQ12: Why were you getting in touch with the Food Standards Agency?
Base: (56)

Attitudes towards the FSA – positive statements

Positive statements scored well overall. The FSA is seen as trustworthy, honest and reliable by 87% of respondents



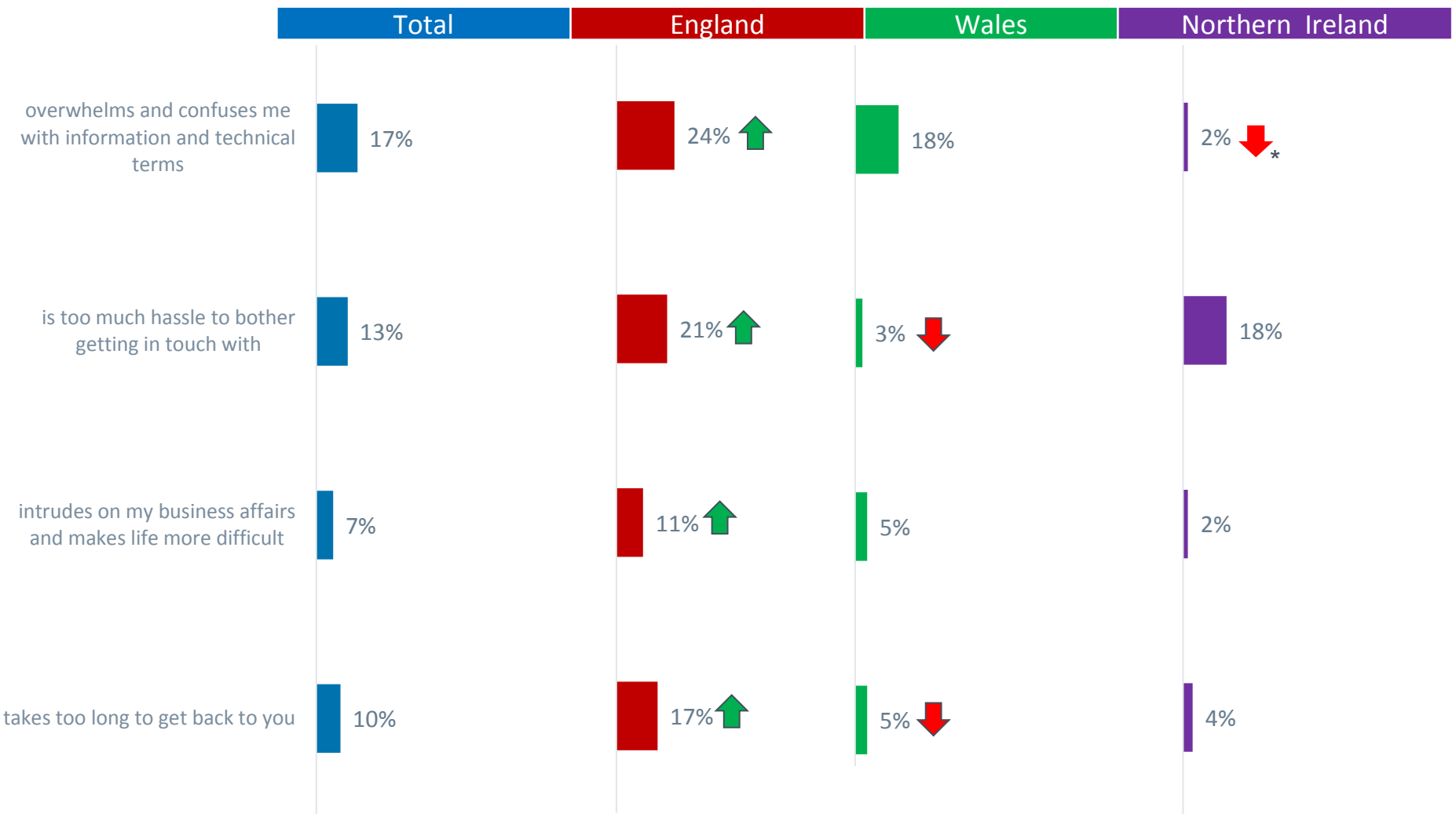
Arrows indicate significant difference between country and total level data. Green arrow = sig. higher than Total. Red arrow = sig. lower than Total



MQ13. Thinking still about the FSA, how much would you agree or disagree with the following statements:

Base: 252, (England 100, Wales 102, Northern Ireland 50)

Attitudes towards the FSA - negative statements

17% state that the FSA overwhelms and confuses them with information and technical terms.



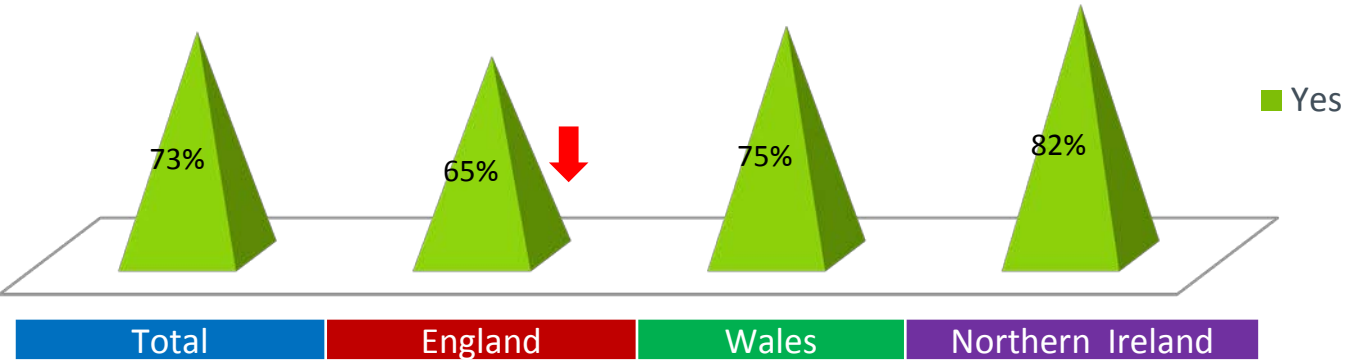


 Arrows indicate significant difference between country and total level data.
 Green arrow = sig. higher than Total. Red arrow = sig. lower than Total

MQ13. Thinking still about the FSA, how much would you agree or disagree with the following statements:
 Base: 252, (England 100, Wales 102, Northern Ireland 50) * Caution, base is less than 50

Does the FSA make legislation changes clear to businesses?

73% agree that FSA makes legislation changes clear to businesses. This is significantly lower in England where only 65% are in agreement.

Does the FSA make information about changes to legislation clear to businesses?

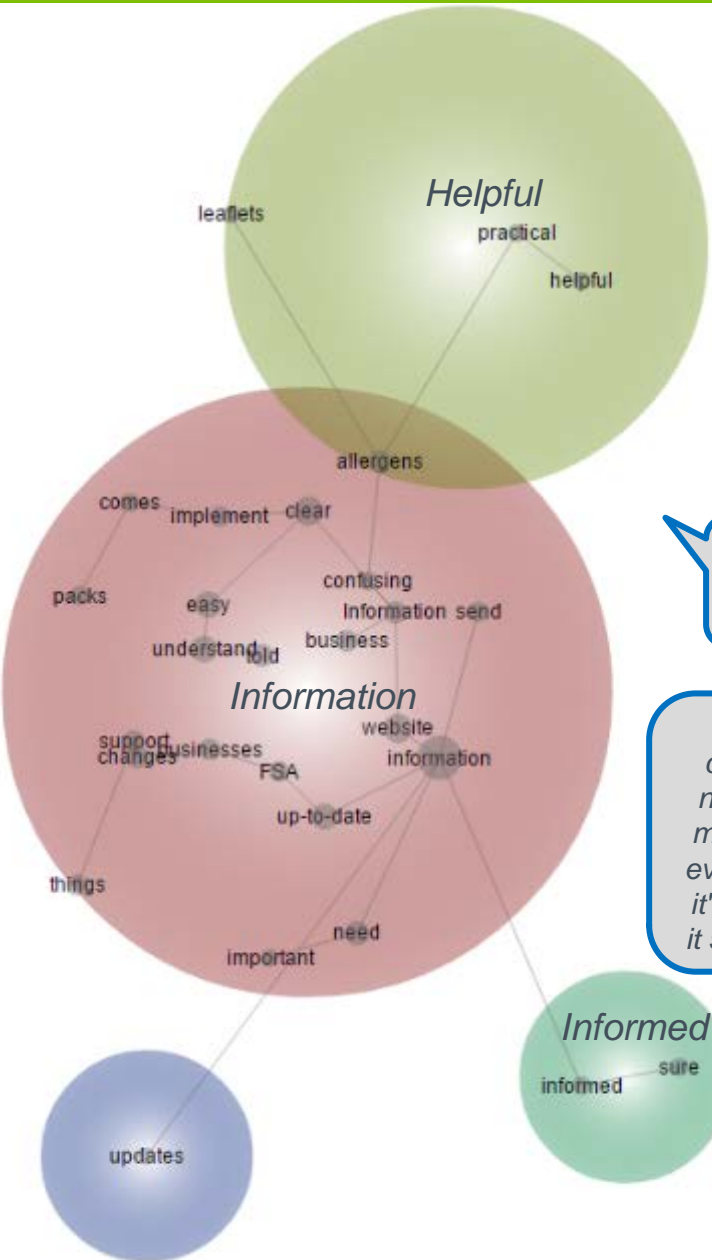


↑ ↓ Arrows indicate significant difference between country and total level data. Green arrow = sig. higher than Total. Red arrow = sig. lower than Total

MQ14a: Do you feel that the Food Standards Agency makes information about changes to legislation concerning food safety and hygiene regulations clear to businesses?
Base: (252); England (100), Wales (102), Northern Ireland (50)

How does the FSA make legislation changes clear to businesses?

27% say the FSA makes changes clear, understandable, well explained and straightforward.



Everything is made simple - they try and be helpful

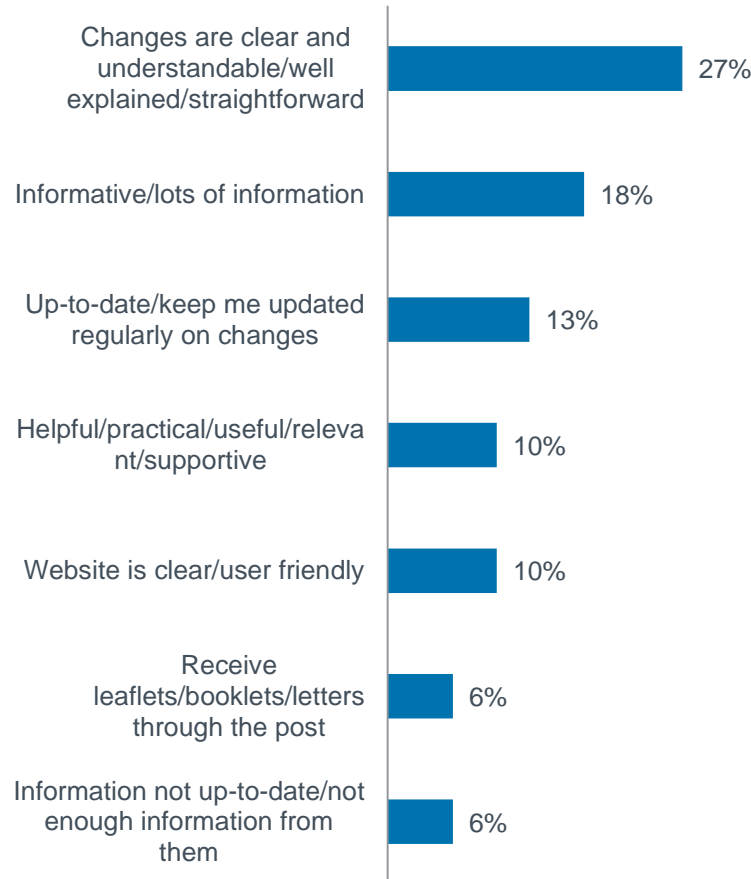
It just makes things clearer in your mind that you know what the rules are

They must have supplied us with the correct information because we pass all our inspections

Understandable, practical, related to my needs

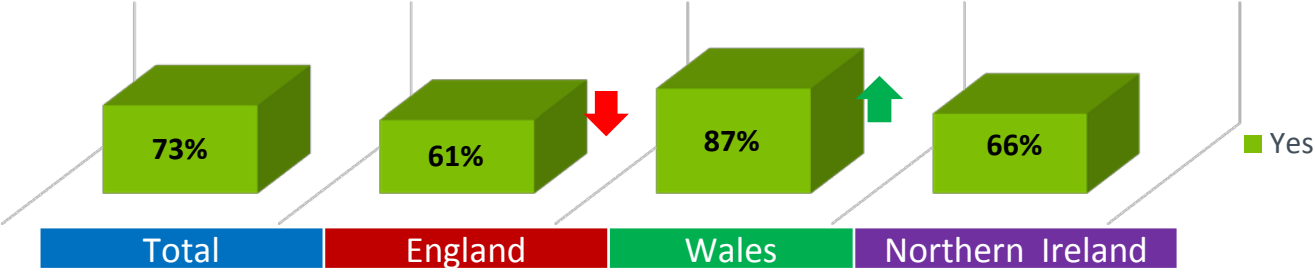
I have never been contacted by them, they need to keep businesses more in the loop, I haven't even had an inspection but it's all common sense isn't it so I don't worry too much

Always clear information



Do they get the info they need to run their business with good hygiene standards?

73% agree they get what they need. The most stated reason being that they get all the information, updates/advice they require.



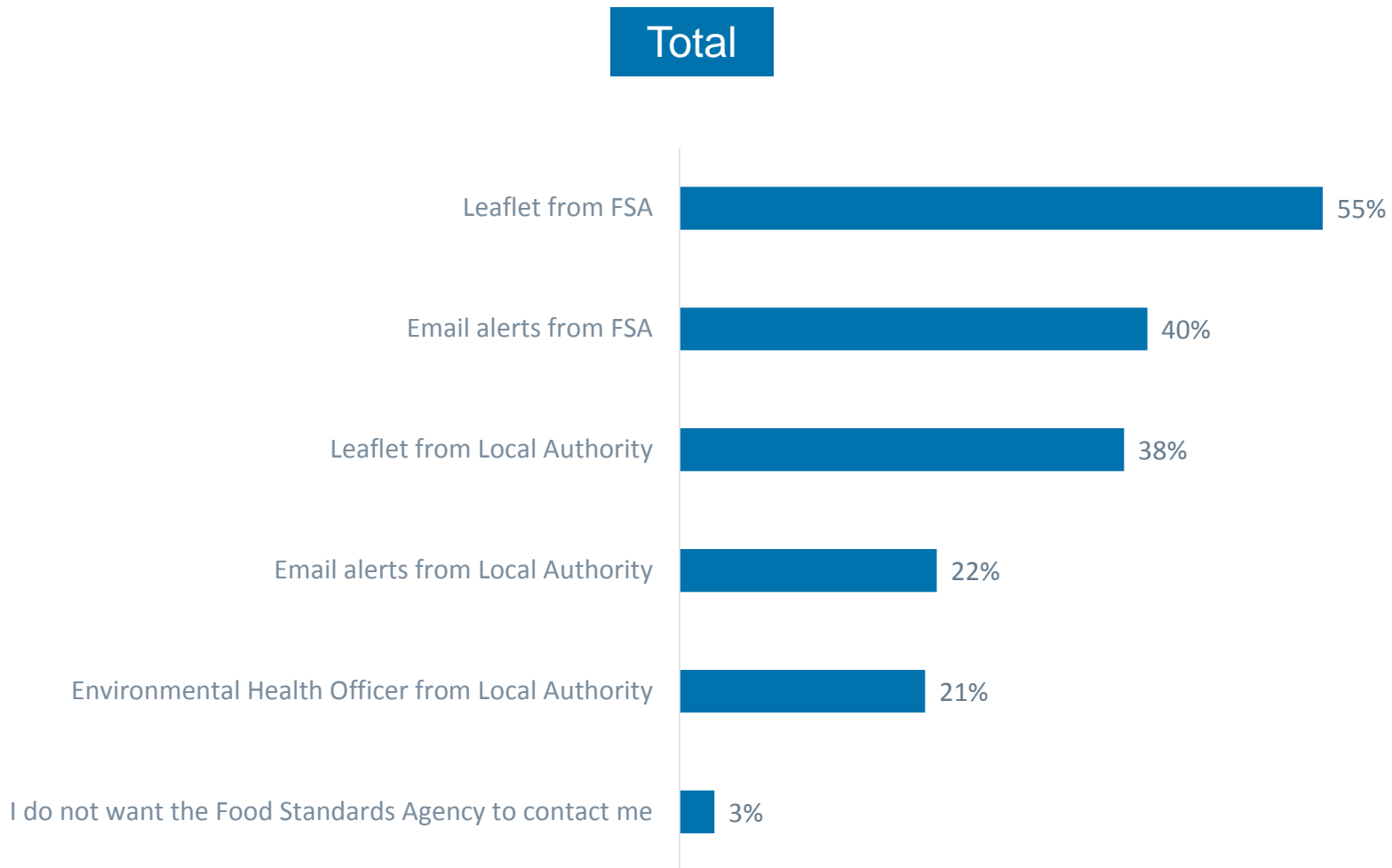
Yes



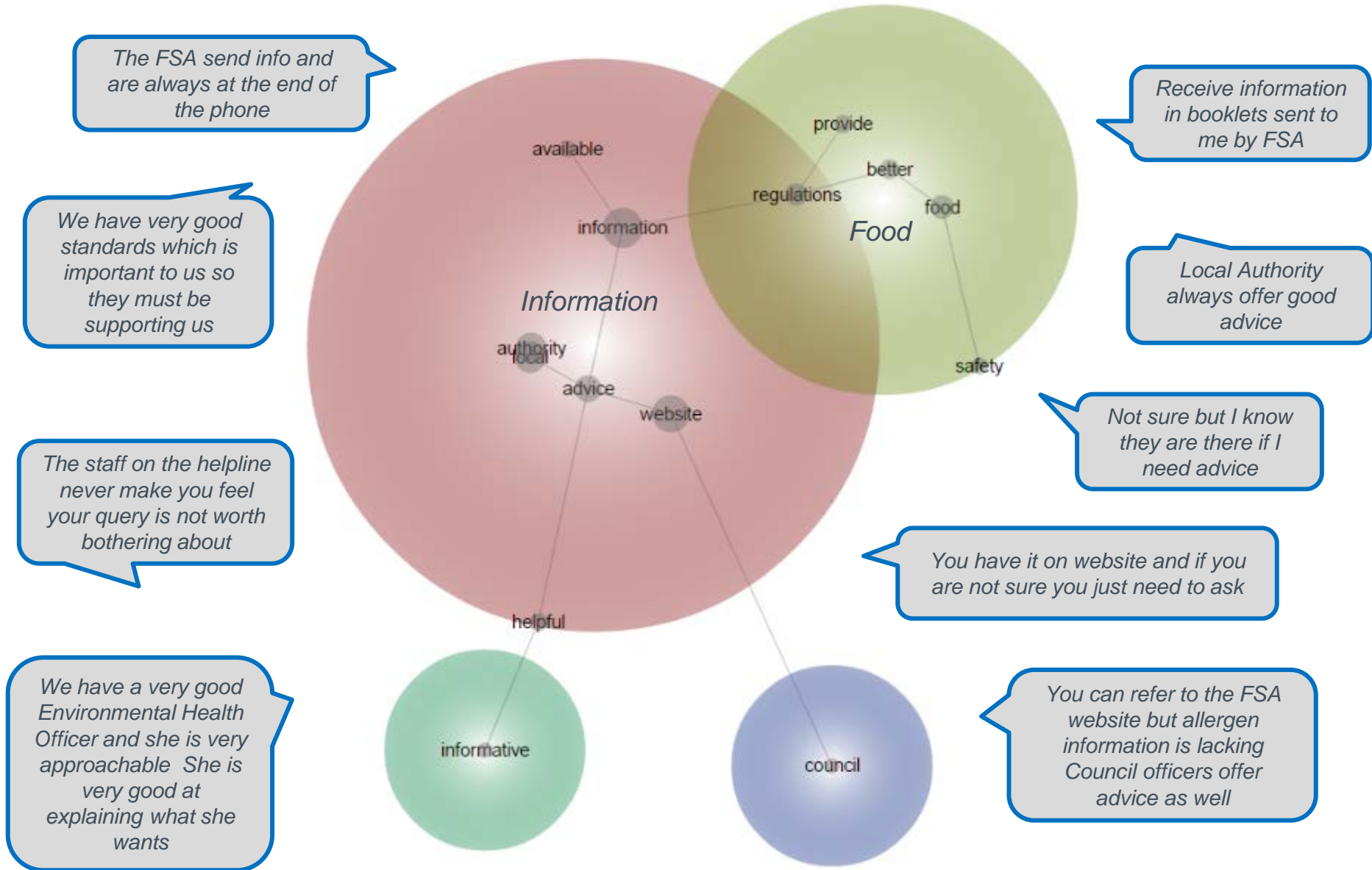
Arrows indicate significant difference between country and total level data. Green arrow = sig. higher than Total. Red arrow = sig. lower than Total

MQ15: Do you feel that you get the information you need to run your business with good food hygiene standards?
 Base: (252); England (100), Wales (102), Northern Ireland (50)

How would they like to be told about changes to food safety and hygiene legislation? 55% say they prefer to receive a leaflet from the FSA and 40% would prefer an email.

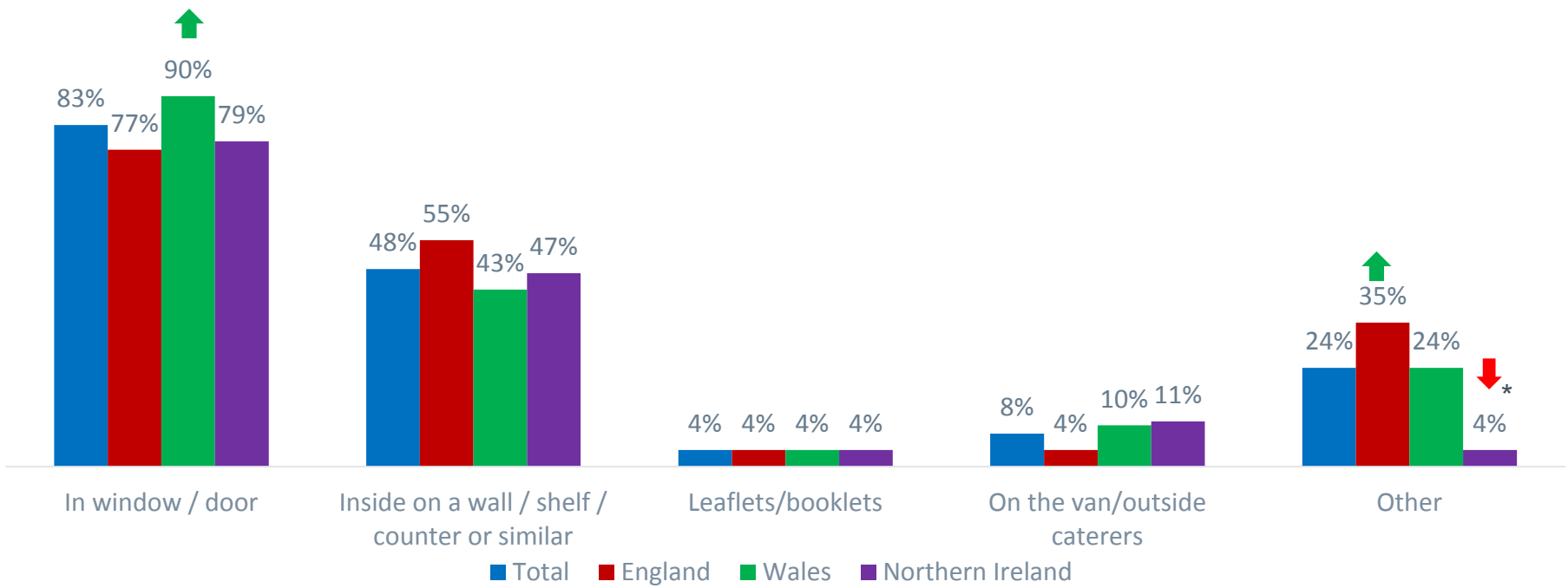
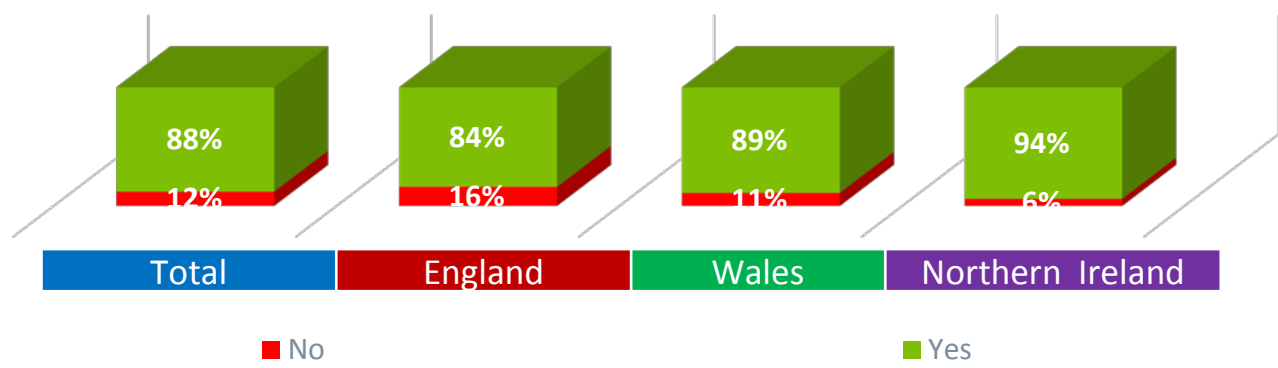


Reasons they feel they get the information they need to run their business with good food hygiene standards.



Use of food hygiene certification materials provided by the FSA

88% claim they use the materials provided by the FSA. In a window/door is the most popular place to display the FHS rating sticker.

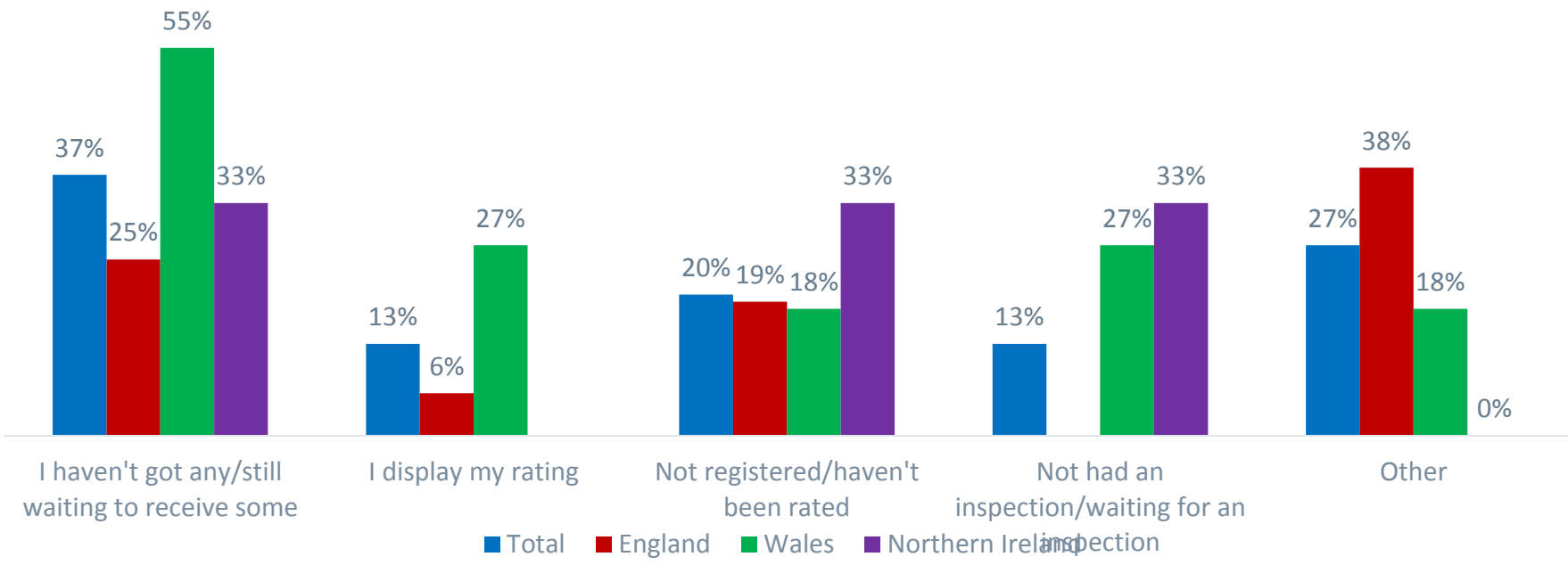
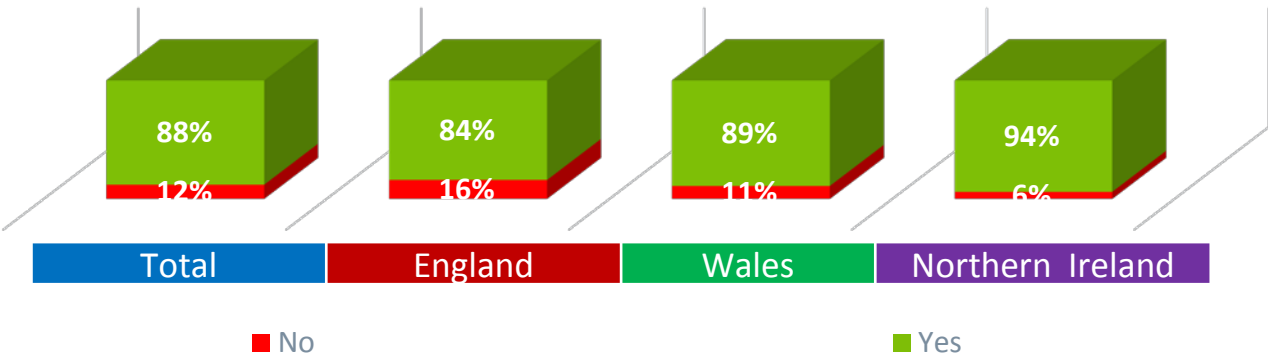


↑ ↓ Arrows indicate significant difference between country and total level data. Green arrow = sig. higher than Total. Red arrow = sig. lower than Total

MQ17: Do you use any of the food hygiene certification materials that are provided by the Food Standards Agency? Base: (252); England (100), Wales (102), Northern Ireland (50)
 MQ17a: Yes: please specify where.. Base: (222); England (84), Wales (91), Northern Ireland (47)
 * Caution, base is less than 50

Use of food hygiene certification materials provided by the FSA

Of those who do not use the material (12%), the most stated reason was that they haven't got any or are still waiting to receive some.



MQ17: Do you use any of the food hygiene certification materials that are provided by the Food Standards Agency
 Base: (252); England (84), Wales (91), Northern Ireland (47)
 MQ17a. No: Why not? 46
 Base: (30); England (16), Wales (11), Northern Ireland (3)