ANNEX B – Key insights

December 2020

This annex brings together findings from a range of sources, our own data as well as that of others, taken from social research surveys as well as non-survey methods such as social media listening and deliberative methods like focus groups and public dialogues. It is worth noting that these studies use different methodologies, so the results for similar questions may differ slightly – in the few cases where discrepancies are significant we have highlighted these and suggested why this might be.

We have outlined our latest insights on

1. Consumers
2. Small food businesses
3. Local authorities

Work is currently underway to understand the views of major stakeholders for the FSA and we will report on this in due course.

1. Consumers

Our consumer insight programme is well established. Our evidencing of 'other legitimate factors' as part of the risk analysis process agreed by the Board is strengthened by application of new knowledge about consumer attitudes and behaviours from surveys like Food and You and our Public Attitudes Tracker and new quantitative methods of understanding consumers' values and preferences.

Most of the statistics quoted are prompted by survey questions. Spontaneous responses often record much lower results – food risk is naturally not top of mind for most people.

Food safety outside the home

- The top consumer food safety concern is food hygiene when eating out (31%). Although 76% say they think restaurants and food establishments should pay more attention to food hygiene, a lower 41% are concerned about food safety in UK restaurants, pubs, cafes and takeaways. Similarly, 37% are concerned about the safety of the food sold in UK shops and supermarkets.

- When asked about the potential impact of EU exit, food from outside the UK being safe and hygienic ranks as the top concern (72%), while food produced in the UK being safe and hygienic ranks as the bottom concern (55%)[1].

- When asked about food hygiene standards, about three-quarters of consumers say they are aware of hygiene standards in places they eat out at or buy food from. Of those aware, more than half look at the food hygiene rating, and many are aware via the general appearance of the premises. Of the 85% of respondents aware of hygiene standards, awareness of hygiene standards via food hygiene stickers has doubled since 2010, from 33% to 66%. In total, 69% say they check the food hygiene rating by looking at the food business window or door and 82% say they have seen a hygiene rating sticker. 87% say they recognise an FHRS sticker when shown one, which has risen +53% since 2012.

- Food & You finds 60% say a good hygiene rating score is important in their decisions about where to eat out, jointly top with price and good service (60-61%). In contrast, the FHRS Tracker finds, when asked an open-ended question on what they take into account when deciding where to eat out or buy takeaway food, only 19% mention hygiene standards/food safety and only 8% mention food hygiene rating. At the same time, around 52% say they often or sometimes check the FHRS rating before deciding to buy food from an establishment and around 35% say they would definitely decide to eat out somewhere based on the FHRS rating.

Food safety at home

- One of the top food safety concerns is food poisoning at 28%. This is supported by focus group research which finds consumers are highly concerned about food poisoning due to personal experience and high awareness of its quickly felt and sometimes serious consequences. 47% say they have experienced food poisoning, 16% say in the last year.

- The most frequently reported perceived source of food poisoning is raw chicken or turkey at 79%. Salmonella and E-coli are by far the most commonly heard of types of food poisoning (90% and 84% respectively), while fewer consumers have heard of Norovirus for example at 59%.

[1] The latest official statistics indicate that about half of food consumed in the UK is produced in the UK and about half produced outside the UK.

- Despite mixed levels of knowledge, consumers are generally confident in their own personal food safety knowledge and practices, reinforced by heavy reliance on 'common sense' and instinct in determining food risks. 74% think 'I am unlikely to get food poisoning from food prepared in my own home' while 42% think 'If you eat out a lot you are more likely to get food poisoning'. When people who had experienced food poisoning were asked what action they took as a result, 43% said they took no action, but the most common actions were stopping eating at certain eating establishments (33%), while only 10% changed the way they prepared or cooked food. 40% consider promoting food safety in the home an FSA responsibility.

- 76% believe cooking food thoroughly could help them avoid food poisoning. 77% report always cooking food until it is steaming hot throughout. 88% report never eating chicken or turkey if the meat is pink or has pink or red juices, 79% for sausages, 73% for whole cuts of pork or pork chops, 62% for burgers.

- 58% believe eating food by the use-by date could help them avoid food poisoning. 63% consider date labels, such as best before and use-by labels, an FSA responsibility. 75% think use-by date is the best indicator of food safety, and 63% report always checking use-by dates when they are about to cook or prepare food. Yet when asked how they would tell whether foods were safe to eat or use in cooking, only a minority mention use-by-dates, e.g. milk and yoghurt (29%), raw meat (28%), eggs (25%), cheese (21%), fish (21%), instead usually relying on smell.

- 46% believe not washing raw chicken could help them avoid food poisoning. 50% report never, and 26% report always, washing raw chicken. 49% report never, and 22% report always, washing other raw meat and poultry. 33% report never, and 25% report always, washing raw fish or seafood.

- When asked how they usually defrost frozen meat or fish, 41% say they usually leave the meat or fish at a room temperature, not recommended by FSA, and 32% say they usually leave the meat or fish in the fridge, the recommended method.

Food Hypersensitivities

- Our Attitudes Tracker and Food & You surveys monitor the proportion of the public affected by food allergies and intolerances. About 5% of consumers say they have a food allergy, about 3% say their food allergy has been clinically diagnosed. Around 10% of consumers say they have a food intolerance.

- Our social media listening finds there has been a rise of food allergy and intolerance conversations over 2018. Food allergy conversation topics on social media commonly include severity of allergies and intolerances and how they can be commonly perceived. There is a conversational normalisation of intolerances and alternative foods. Conversations are driven by personal experiences and finding ways to improve individual diets and health. These conversations are often around dairy, and dairy-free is one of the most commonly mentioned terms. Consumers say cows' milk and its products are the foods which most commonly cause them to suffer an adverse reaction at 4%. A key conversation topic is changing attitudes towards milk and increasing popularity of alternatives such as oat milk.

- Our social media analysis on food allergies finds the top 5 most frequently mentioned allergens from the official 14 list are, in line with this, milk at 15,000 mentions, followed by nuts (examined generically rather than peanuts or tree nuts), peanuts, cereals containing gluten, and eggs. Milk, cereals, eggs and soybeans are most likely to appear in combination with other allergens. Outside the official 14 list, coconut at 800 mentions is the 9th most talked about allergen overall, with more mentions than crustaceans, sesame seeds, mustard, celery, SO2 and sulphites, molluscs and lupin from the official 14. Spikes in mentions are often linked to news media articles.

Allergen labelling rules

- Our Attitudes Tracker finds 22% of the public are aware of, and able to specify, rules about allergens i.e. any information rule, regulation, or legislation relevant to this subject. 45% are not aware of any rules about allergens, and 33% are not sure. The most commonly mentioned allergen rules are that allergens must be displayed on menus or labels (7%).

- In contrast, our work on young people with food allergies/intolerances finds 67% of young people with food allergies/intolerances are aware of the legal requirement of food businesses to provide customers with information on the top 14 allergens, when used as ingredients in the food they serve.

Allergen information

- 9% of the public say provision of food allergy information is an important factor when they decide where to eat out. By contrast, 51% of young people with food allergies/intolerances say they always check online menu allergen information before choosing what to eat when ordering a takeaway/food online. 55% of young people with food allergies say they always research the menu online before going to a new/unfamiliar place, making it the most consistent allergy management practice, as only 9% of young people with food allergies say they always call the restaurant to check if they provide allergen information and/or prepare a meal that is safe for their needs.

- Between 75% and 81% of the public are confident asking a member of staff for information about ingredients in food because of a concern about possible allergen / food intolerances, varying slightly between outlet types, at 75% in a takeaway versus 81% in a restaurant. Confidence in asking for information varies most between those in Northern Ireland (93%) compared to those in England (77%) and Wales (79%), around a 15% difference.

- Our work on preferences of people with food allergies/intolerances finds they tend to prefer to access allergen information in written form, although they also appreciate menus containing symbol/abbreviation-based warning systems. They frequently encounter written information as a sign asking people to ask staff and to make themselves known to staff if they had a food allergy or intolerance. Although some people with food allergies/intolerances see this as suggesting raised awareness and a willingness to respond to allergen enquiries, many see it instead as venues taking the easiest option available to fulfil the letter of the law but not its spirit.

Trust in the food system

- Our recent research shows that trust can be largely thought about as ‘social’ trust (intention), and ‘cognitive’ trust (delivery). Perceived ability, benevolence and integrity are also recognised as key pillars of trust. The following are interpreted as signals that a venue will probably provide a safe and enjoyable experience when eating out: evidence of staff knowledge and awareness, proactive staff with a willingness to adjust dishes, staff with a positive and engaged attitude, who deal with difficulties in a positive manner and communicate well.

- Our latest tracking research has found that 76% trust the authenticity of ingredients, origin or quality of food, and 61% trust that the people who produce and supply food make sure it is safe, honest and ethically approved.

- A common theme throughout deliberative research with consumers about the food system is their surprise at its complexity, and they therefore value the provision of transparent information. Consumers tend to have a high degree of confidence in UK food, but low knowledge about how the system works, in terms of the processes, standards and quality assurance mechanisms in place.

- In general, three-quarters of consumers feel confident that food is what it says it is on the label or menu. 55% of consumers who report not always feeling confident that food is what it says it is on the label or menu report taking no action. Of the 67% who are not always confident, 5% say this is due to food allergy concerns. Our EU Exit Tracker findings indicate much more concern about food being what it says it is compared with other surveys. This might be a priming effect.

Awareness and trust in the FSA

- We have baselined new composite measures of trustworthiness, based on OECD best practice, for the FSA (6.9/10) and the food system (3.8/5).

- Our latest tracking survey (May 2019) shows that 78% of people were aware of the FSA. Respondents in Northern Ireland were more likely to be aware of FSA (85%) compared to Wales (81%) or England (77%). 66% of those aware of the FSA trust the FSA to do its job, decreasing by 1% since the previous wave (Nov 2018). This decrease is not statistically significant, and the level of trust is still high.

- Consumers tell us repeatedly in qualitative research want a visible, powerful FSA protecting their interests in the food system while maintaining proactive consumer communications that help the public empower themselves. We are the most trusted regulator as measured by the cross-Government Reputation tracker. This is likely to be because of our proactive media handling, our consumer facing activity and the visibility of FHRS.

- However, the current high levels of trust in FSA do not seem to be based on detailed understanding of FSA performance. As the public learn more about the food sector, this can increase concern. However, learning more about the FSA's role increases trust in FSA.

Healthy food

- Social media listening revealed that there were at least 4.4 million mentions of health in relation to food on major social media channels throughout the year. The top 5 most commonly mentioned topics within health were: sugar (1.2m), fitness & exercise (618.7k), obesity (555.1k), diet for disease (187.3k) and keto (178k). Interest in sugar and gluten free has grown gradually over the last decade, and keto has seen a huge growth over the last couple of years.

- The FSA Public Attitudes Tracker has been monitoring consumer concerns about food related issues since 2010. Latest findings from May 2019 reported that half of consumers are, to some extent, concerned about the amount of sugar in food, and there has been a generally steady increase in concern since November 2012 (when concern was below 40%). Other health related food concerns include the amount of salt in food (39%), the amount of fat in food (36%) and the amount of saturated fat in food (35%).

- Research in Northern Ireland about attitudes towards reformulation of food found that participants welcome labelling that creates consumer choice, despite not always making use of it. Participants broadly accepted the need for product reformulation, acknowledging the potential health benefits, something which is important to them.

- Consumers often claim that they seek out healthy options when purchasing food, or when eating out, with around a third noting 'healthier foods / choices' as a factor considered important when deciding where to eat.

- 49% are concerned about the amount of sugar in food; this is usually the top food issue of concern for about 5 years. It has risen more than any other concern in the Attitudes Tracker since 2010 at +10%. When asked which factors are important in their decisions about where to eat out, 31% say healthier foods/choices and 7% say calorie information provided. However, trends for actual purchasing behaviours for sugary foods tend to be flat or slightly increased across the board of sugar products, including biscuits, cakes, desserts, sweet home cooking, pastries, soft drinks and confectionary.

Young people and food

- A social media listening exercise into areas of activism on food in 2016 showed that those aged 18-34 are more likely to be actively engaging in sustainable consumption. Although the latest attitudes tracker indicates that in general younger people are less likely to be concerned. Those aged 16-25 were also less likely to agree that they are "conscious of the wider impact of the food choices I make" (67%) compared to those aged 50-65 years old (79%). However, concern about food waste among 16-25 year-olds has increased from 37% to 49% in the past year.

- Our rapid evidence assessment and subsequent quantitative survey with Generation Z (16 – 25 year olds) has found that price is strong driver of food choices almost two thirds (58%) of Gen Z say price influences their decision making related to food, compared to 45% of UK adults as a whole. Gen Z appears to be eating a 'typically teenage' diet, with relatively low intake of fresh fruit and vegetables and a higher consumption of takeaways than older generations, but this is likely to be linked to a life-stage effect.

- Young people with food allergies feel less confident than the public that food businesses can provide correct information regarding allergens in food they serve: 2% feel extremely confident, 11% very confident, 39% quite confident, 32% a little confident, 15% not at all confident. In addition, young people with food allergies feel less confident than the public about asking for allergen information when eating out or ordering a takeaway/food online: 14% feel extremely confident, 19% very confident, 27% quite confident, 27% a little confident, 14% not at all confident.

- Both Gen Z (9%) and Millennials (9%) are slightly more likely to be vegetarian or vegan compared to UK adults (6%) and this cohort are significantly more likely to say that they are trying to reduce the amount of meat they are eating and are more likely to state that the top challenge to the food system is an environmental issue. However, we often see that this concern does not necessarily translate into behaviour.

Meat

- Similarly, while veganism was the most frequently mentioned food topic on social media in 2018 at 3m mentions, only a small proportion of consumers report that they are completely vegetarian (3%) or vegan (1%).

- Trends for purchasing behaviours for meat tend to be flat across the board including fresh, frozen, and cooked meats, though we are seeing people report that they eat less red meat. Animal welfare is consistently in the top five concerns for consumers in our attitudes tracking survey.

The environment

- 51% report concern about food waste, making it the top consumer concern; this appears to be rising. 39% consider ensuring food is sustainable to be an FSA responsibility. Specifically, 30% are concerned about chemicals from the environment, such as lead, in food; 29% are concerned about use of pesticides to grow food (AT W18); and 24% are concerned about food miles. Regarding their food choices, 73% say they are conscious of their wider impact, and 65% say they are concerned about their environmental impact.

- Conversations about sustainability on social media highlight the cultural shift to this being an issue affecting everyone and not just businesses. Looking at purchasing behaviours for ethical food and drink, including organic, fair-trade, free range and freedom foods, sales have risen year-on-year since 2007, to 11% of all household food sales[2].

Affordability

- The price of food is consistently in the top three consumer concerns. 40% think food prices will be affected by EU Exit in the next 2-3 years. 59% think it will make food more expensive. 47% report making at least one change in their shopping or eating behaviour for financial reasons over the past year, most commonly: eating at home more (22%), similarly eating out less frequently (20%), and eating fewer takeaways (19%). Nonetheless, 93% say they have eaten or bought takeaway food away from home in the last month, most frequently a restaurant (68%) or takeaway (56%).

- Consumer spending on food, drink and catering has continued to rise, by 6% in 2017, as spending on food (including non-alcoholic drinks) increased by 5%, alcoholic drinks by 7%, and catering by 7%.[3] This is partly due to widespread rises in food prices[4].

- 81% of people feel they have access to an affordable healthy diet and 78% feel they will in the future. 17% say they have worried about running out of food before there was money to buy more, interestingly fewer at 11% say they have felt that they couldn't afford to eat balanced meals.

- Food poverty is a topic of conversation on social media. Food bank conversations are largely in response to political actions consumers disagree with, including EU exit effects. Food bank usage has increased in the last 5 years by up to 73%[5].

- 43% of respondents report concern about food prices. Concern varies across groups with those in Northern Ireland (61%) and those aged 36 to 49 (54%) more likely to report prices as a concern. Our latest data saw a decrease in concern about food prices from the previous 6 months, though this trend has fluctuated over time.

Country of origin

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[2] Government food statistics pocketbook
[3] Government food statistics pocketbook based on Ethical Consumer Markets Report 2018
[4] All food groups have risen in price since 2007, with rises ranging from 22% to 56%.
[5] No official statistics for food bank usage, so used Trussell Trust which accounts for half of the nation's food banks as an estimate (as per the latest parliamentary briefing).

- Half of consumers think country of origin labelling is an FSA responsibility. 59% say they try to buy British food whenever they can, and 47% say they usually check the label to see which country their groceries come from.[6]

- Concern about food being safe and hygienic is 17% higher for food from outside the UK at 72% than for food produced in the UK at 55%. 29% believe that safety of food from outside the UK will get worse now that the UK has voted to leave the EU. Concern about food being what it says it is, or food authenticity, is 17% higher for food from outside the UK at 72% than for food produced in the UK at 55%, ranking as the joint top concern and joint last concern respectively. 30% believe the authenticity of food from outside the UK will get worse now that the UK has voted to leave the EU, compared with 16% for food produced in the UK.

2. Food businesses

We work closely with colleagues across Analytics and in Regulatory Compliance to develop a grounded understanding of business behaviours, cultures and theories of change. We are now focusing on developing and piloting behavioural interventions and looking at how we will evaluate the programme. We now have a regular tracker for small and micro food businesses which reports annually on their concerns and their confidence in us. We work with Field Operations and NFCU to apply behavioural insights to key initiatives, such as intelligence gathering.

Small and micro food businesses

Our work to understand the views and concerns of small and micro food businesses is informed by an annual survey, the next wave of which is currently in field. These reports are taken from the 2018-9 survey. We have also conducted desk research to understand what influences businesses to comply with regulation.

Views on regulation

- The results from our tracking survey show that over half of small food businesses hold broadly positive views of regulation within the food industry and regulations are believed to be beneficial and necessary for consumer safety and maintaining good standards across the industry. For example, 62% agree that regulations are effective at protecting the public, and the same proportion agree that information on food safety and hygiene is easy to find

[6] Government food statistics pocketbook based on Lightspeed GMI/Mintel.

and access. 59% agree that regulations are reasonable for food businesses and 54% agree that they are easy and practical to keep to.

- Half of them agree that the processes in place to ensure food businesses keep to the regulations help to ensure the worst performing food businesses will improve and that regulations add value to businesses. However, only 38% agree that the paperwork involved in keeping to the regulations is reasonable.

- 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.

- Significant minorities of respondents are not certain that all food businesses do what is required to make food safe and appropriately labelled, particularly evident among food businesses in England.

Confidence in the FSA

- Few businesses have had direct 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.

Processes and interventions

- 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; and 1% have voluntarily closed 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 process feel that they have received clear communications. In all but having enforcement action taken against them, the 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%).

- 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.

Small 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%).

Exiting the EU

- This 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 but comes to the fore for exporters and importers. Overall, 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. Those expecting a positive impact tend to feel it may push purchasing and spending back towards UK businesses and eventually reduce red tape.

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 direct 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: 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.

Sources of information, advice and support

- 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 (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 our 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%).

- 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. 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).

- 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.

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.

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 (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.

Drivers of compliance

- We have reviewed the available literature on what makes food businesses more, or less compliant. Decision-making is largely governed by the amount of effort that is needed to gain the rewards in terms of benefits to business, and typically compliance is seen as a cost. If enforcers are seen to be working consistently by making similar judgments and decisions (e.g. consistency in hygiene ratings), then FBOs are likely to see the regulatory system as significantly more credible.

- FBOs have misperceptions regarding the effort (time, human & financial resources) required to meet acceptable food safety standards.

Communication needs to be streamlined in such a way as to make it clear how changes can be implemented efficiently and easily – especially for micro, small and medium FBOs.

- For FBOs, improvements in compliance is not seen as an end in itself so capitalizing on what's in it for them will be more effective in the long run. This can take the form of emphasising improvements to reputation, increasing their profile, competitive advantages, and other such incentives. A positive approach sends a clear signal to FBOs that the focus is on promoting good or even best practice, and this can easily be co-opted into FBOs food safety culture, especially if they are able to perceive the long-term benefits with respect to business incentives. The appetite for change exists, and as FBOs adapt and expand in scope, the pressures on regulation to do the same will increase.

3. Local Authorities

Across the FSA, working closely with Analytics colleagues and the RoF Programme, we are starting to build a more systematic understanding of local authorities.

Food Standards

- The Regulating our Future team undertook a survey on food standards (i.e. compositional/labelling requirements and authenticity) which indicated that there is significant variation in available food standards resource between local authorities and across the three countries we serve. Levels of resource in England are generally lower than in Wales and Northern Ireland, with 22% of English LAs having less than 1 Full-Time Equivalent ('FTE') dedicated to food standards work.

- This resource could be further reduced by an increased demand in other areas in which the officer has enforcement responsibilities, leading to a lack of resilience/capacity in the food standards regulatory system. Many LAs do not have a stated minimum service requirement for food standards which, coupled with a lack of ringfenced funding for food standards delivery could lead to further reductions in resource in future. Responses indicate a lack of new personnel entering the profession via the Trading Standards Qualification Framework ('TSQF'), with issues concerning both the numbers of students coming into food standards regulation, and the capacity of LAs to provide adequate support and practical experience to trainees.

- Even where the funding is available, local authorities are finding it increasingly difficult to recruit and retain Environmental Health Practitioners and Trading

Standards Officers due to a lack of suitably qualified people coming through the system.

- There are increased numbers of environmental health practitioners now enforcing food standards legislation across England and Wales however there is a lack of information relating to the levels of training and support provided, and the ways in which competence is ensured and maintained. Respondents highlighted issues with the lack of importance placed on food standards considerations when delivered with food hygiene during a combined inspection.

- Overall, 15% of food businesses are unrated (i.e a new business that has not yet had an initial inspection) for food standards risk, however the figures for some LAs are higher. 54% of respondents indicated that they measure the impact/success of their food standards work; Where impact/success is monitored, this is often limited to arbitrary indicators such as numbers of notices issued/inspections achieved, rather than quantifying the impact the service has had on local businesses and consumers.

- Alternative approaches to delivery have been, or are being, adopted by many LAs for a number of reasons, for example to allow for the more effective targeting of resource to address specific/identified risk, leading to potential inconsistencies within the regulatory system; there is widespread use of intelligence by LAs in planning & prioritising food standards.

- Regional food standards groups are an important conduit for sharing knowledge, expertise & intelligence and ensuring consistency, particularly as resources in individual local authorities reduce and experienced officers are lost through redundancy and natural wastage.

- Whilst many LAs offer a range of services to businesses to assist compliance, there is an inconsistent approach to the provision of business advice and guidance across the three countries. There is no charge for business advice services in Northern Ireland, however in England and Wales a range of free and charged-for advice services are being offered. Cost recovery arrangements are most prevalent in England, particularly in County authorities, but vary in terms of cost and the charging mechanisms adopted. 46% of respondents across England and Wales indicated that they had Primary Authority Partnerships covering food standards (the Primary Authority scheme does not extend to Northern Ireland).

Local Authorities and Allergens

- The FSA's Regulatory Compliance Division has recently completed a series of seven strategic update events for all local authorities (LAs) in England. This helped identify concerns about enforcing allergen regulations including the new labelling requirements for pre-packed foods, challenges when communicating with FBOs and verifying procedures and the support LAs require from the FSA to help them address these, from their point of view.

- Certain language barriers and cultural differences make it difficult for officers to advise food businesses – some establishments will never have had to label food before. In addition, "May Contain" statements used by manufacturers cause confusion for catering FBOs and this information is not being communicated accurately.

- Local authorities feel that there is a lack of clarity with regards to the roles of trading standards and environmental health officers, and inconsistent application of The Brand Standard between Authorities. This arises because management of allergens is a food safety issue that should be addressed through a food hygiene inspection when considering the FBO's Food Safety Management System, whereas the labelling requirements relating to allergens are enforced by Trading Standards Officers through food standards inspections, where these controls are carried out separately.

- There are concerns that a greater focus on allergens will led to fewer inspections being undertaken due to limited resources, and that focusing on allergens will reduce the amount of time available for inspections. More specifically, the lack of a legal definition for PPDS makes enforcement difficult.

Indicators of performance

- We are starting to do some initial research to understand more about the trade-offs that local authorities have to make to inform a wider/fairer range of indicators going forward. Unsurprisingly, initial findings suggest that local authorities with a low FTE to FBO ratio, high non-compliance and in a deprived area are more likely to underperform.

References

Attitudes Tracker Wave 18 (2019)
(fieldwork May 2019, published August 2019)
https://www.food.gov.uk/about-us/biannual-public-attitudes-tracker
This face-to-face survey has run biannually since 2010. It monitors consumer attitudes related to FSA and food-related issues. Wave 18 findings are based on interviews with a representative sample of 2,080 adults aged 16+ across England, Wales and Northern Ireland.

EU Exit Tracker Wave 9 (2019)
(fieldwork July 2019, internal except for this link)
https://www.food.gov.uk/sites/default/files/media/document/consumers-views-on-eu-and-food-summary-of-findings-july-2019.pdf
This survey has run since 2016, biannually instead of quarterly since January 2018, to track public attitudes to food and regulation in the context of leaving the EU. Wave 9 findings are based on a sample of 1,438 adults aged 16+ across England, Wales and Northern Ireland.

FHRS Tracker Wave 7 (2019)
(fieldwork October 2018, published March 2019)
https://www.food.gov.uk/research/research-projects/food-hygiene-rating-scheme-consumer-attitudes-tracker-wave-7
This face-to-face survey has run independently since 2014. It collects information about consumer awareness, attitudes towards, and use of the Food Hygiene Rating Scheme. Wave 7 findings are based on 2,070 interviews with a representative sample of adults aged 16+ across England, Wales and Northern Ireland.

Food and You survey Wave 5 (2019)
(fieldwork June-November 2018, published 2019)
https://www.food.gov.uk/research/food-and-you/food-and-you-wave-five
This face-to-face survey has run biennially since 2010. It collects information about public self-reported behaviours, attitudes and knowledge regarding food-related issues. Wave 5 findings are based on 2,241 interviews with a representative sample of adults aged 16+ across England, Wales and Northern Ireland.

Food Standards Delivery Report (2017)
(fieldwork March-May 2017)
https://www.food.gov.uk/sites/default/files/media/document/fsa-18-12-08-rof-survey-report-v.4_3.pdf
The survey sought information relating to the current delivery model/s being employed in respect of official controls and enforcement work relating to food

standards. 104 local authorities responded to this survey, comprising 80 English LAs, 16 from Wales and 8 from Northern Ireland.

Kantar Worldpanel data (2019)
(password-protected account required to access dataset)
Definitions used for graphs, which are available upon request:
Spend: Monetary value purchased [of the defined market] in the considered time period.
AWP – Spend: (Average Weight of Purchase) Average spend [of the defined market] per buyer in the considered time period.
Volume: Physical quantity purchased [of the defined market] in the considered time period
AWP – Volume: (Average Weight of Purchase) Average volume [of the defined market] per buyer in the considered time period.
Buyers: Number of households/individuals that purchased the defined market in the considered time period.

Making food businesses more compliant (2018)
(Literature Review)
https://www.food.gov.uk/sites/default/files/media/document/making-food-businesses-more-compliant.pdf
A review of decisions sciences research to help understand 1) How do Food businesses behave? 2) Can knowledge of this kind be meaningfully applied to improve food business compliance with food law?

Preferences of those with food allergies and/or intolerances when eating out (2017)
(fieldwork 2014-16, published 2017)
https://www.food.gov.uk/research/food-allergy-and-intolerance-research/preferences-for-consumers-with-food-allergies-or-intolerances-when-eating-out
This research aimed to establish consumer preferences for information provision about allergens when eating out and to investigate the impact of the FIR on food allergic and intolerant adult consumers and on parents and caregivers of food allergic and intolerant children. It was informed by stakeholder engagement workshops and literature reviews. Findings are based on multiple surveys with several hundred food allergic and intolerant individuals across the UK, around 30 diaries, and around 130 interviews.

Small and Micro FBO Tracking Survey (2018)
(conducted November 2018)
https://www.food.gov.uk/research/regulating-our-future/fsa-small-and-micro-fbo-tracking-survey

This is a survey of food organisations (FBO) with up to 49 employees across all their sites in England, Wales and Northern Ireland. In total, 530 interviews were completed 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.

Social Media Listening (2019)
(conducted 2018, published 2019)
https://www.food.gov.uk/research/research-projects/social-media-listening-emerging-trends
This research analysed social data, search data, and consumer interviews to uncover drivers of conversations and the communities they engage with. Findings are based on over 13 million mentions or conversations from 14 online sources, such as Twitter, producing a trend model and conversational profile of food related topics in 2018.

Trust in a changing world (2018)
(conducted 2018-19, published 2019)
https://www.food.gov.uk/research/research-projects/trust-in-a-changing-world
This research aimed to identify what indicates trustworthiness to consumers in the food industry and food regulator and make recommendations on how to meet these expectations. Findings are based on a Rapid Evidence Assessment and Citizens' Forum research.

Young people and food allergies / intolerances (2018)
(fieldwork and published 2018)
https://www.food.gov.uk/research/food-allergy-and-intolerance-research/young-people-and-food-allergies-and-intolerances
This online survey was conducted with around 2,599 people aged 16-24 in the UK with a food allergy, intolerance, or both. It aimed to understand their profiles, characterise their experiences of living a food allergy/intolerance, explore their experiences of eating out when not with someone who provides support, and identify key support mechanisms for young people eating out with a food allergy/intolerance.