

Food Hygiene Rating Scheme Online Display in Wales: Research report

Area of research interest: [Emerging challenges and opportunities](#)

Study duration: 2019-09-01

Planned completion: 31 October 2019

Project status: Completed

Conducted by: 2CV and Community Research

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Food Hygiene Rating Scheme Online Display in Wales: Executive summary

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- **Online is increasingly one of the main channels through which consumers interact with food businesses – and research and purchase journeys will often involve multiple channels (online, face-to-face, telephone).** It can feel inconsistent that businesses are required to display FHRs ratings on their premises but not online. Indeed, Consumers could see no reason for a distinction between the information available at the physical premises to those online particularly given the increasing role of online food purchase.
- **Consumers are already quite confident navigating the online landscape when it comes to researching and selecting restaurants and takeaways.** They are accustomed to making the most of the information available online to make decisions around food. and are not necessarily demanding additional help.
- **A range of criteria (including reviews; word of mouth) is used to help inform choices and decisions around food and hygiene in particular – but this information is vague, haphazard and unreliable.** There is a lack of reliable, credible information about food hygiene in the online space. As many regard the FHRs as independent and credible there is some feeling that it would give online sites a “legitimacy” reviews and recommendations do not.
- **Consumers make quick, off-the-cuff decisions when it comes to selecting and researching food.** While they are familiar with and will make (at a glance) use of FHRs ratings on businesses’ physical premises, they are not actively seeking these out online where accessing ratings is currently a more involved process requiring navigation to another website.

- **Consumers strongly support mandated FHRS online display and believe it would both help them make better decisions about food and encourage greater compliance by FBOs.** FHRS ratings on FBO websites (and other online resources, like food aggregators) would be a useful addition to consumers' repertoire of information. Consumers also feel FHRS online would have a positive impact on FBOs from a consumer perspective by making them more compliant.
- **Consumers feel it is important that the ratings displayed online are trustworthy, as well as quick and easy to access.** Consumers feel that FHRS ratings should be displayed as prominently online as they are on premises i.e. on the landing page. There is also a call for safeguards to be put in place to ensure FBOs can't display 'fake' ratings.

Food Hygiene Rating Scheme Online Display in Wales: Introduction

1.1 Background

The Food Standards Agency (FSA)'s Food Hygiene Rating Scheme (FHRS) provides information about the hygiene standards of businesses which sell food directly to consumers (such as restaurants, takeaways, pubs, hotels, supermarkets, newsagents, etc.). By empowering consumers to make informed choices about where they eat and purchase food by selecting those businesses with a higher rating, FHRS encourages behaviour change, driving up business compliance, and reducing foodborne illness.

The FSA know that consumers are increasingly purchasing food online and, as such, may not have immediate access to information on a food business' rating when online. The FSA recognises the continued success and credibility of FHRS is dependent on it meeting consumer demands and expectations. As a result, it was hypothesised that providing food hygiene ratings information on food businesses own websites will enhance consumer accessibility.

The FSA commissioned this research to better understand the potential consumer benefit of mandating online display of FHRS ratings by businesses in Wales.

1.2 Objectives

The research needed to:

1. Explore consumer expectations around online display of FHRS ratings information and build an understanding about consumer context in this area
2. Inform development of best practice in the presentation of ratings information

1.3 Research questions

Specifically, it needed to answer:

1. How and where should the ratings information be signposted to maximise customer awareness and use?
2. What are the best means of presenting the ratings so that consumers can easily access meaningful information that empowers them to make informed choices?
3. What drives consumer reactions and preferences?
4. How high is the risk of misunderstandings or other barriers arising?

5. What strategies might help to prevent confusion and maximise accessibility?

1.4 Methodology

In order to address the research questions, 2CV and Community Research conducted three focus groups (6-8 participants in each) with members of the public to explore the potential benefits of online FHRS display. The groups were preceded by an online digital task. The considerations informing the methodological approach were as follows:

1. **Better understanding of the context:** Exploration of consumer needs and priorities in the context of how decisions are made when selecting a food business could have resulted in some post rationalising (including what they felt they ought to consider). It was believed a digital task, designed to replicate the online experience, would more likely deliver an understanding of current behaviours and any unmet needs.
2. **Avoiding over examination of the issues:** Selection and evaluation of information to help people make decisions on where and what to eat is something done 'in the moment' and relatively quickly. The criteria used are often not given too much thought. Standard 90 minute group discussions afforded enough time to discuss experiences and needs and to work collaboratively on ideas to optimise the FHRS online proposition.
3. **The impact of environment:** It was believed critical to understand the impact of environment. An urban / suburban experience, with extensive food choices could prompt different needs to those in a rural setting, where choices are more limited. As such, the research was designed to include a range of environments, whilst also covering two distinct regions of Wales.

As noted above, participants were tasked with completing (and creating a screen recording of) two online 'journeys' before attending the groups in order to prompt accurate recall and to better understand 'in-moment' purchasing considerations when (a) ordering a takeaway from somewhere new and (b) researching restaurants before a special occasion meal. The group sessions covered the following:

- Exploration of: consumer experiences of, and attitudes to, using information to make decisions; exploration of any unmet needs;
- Understand consumer responses to the provision of FHRS data online and what drives these responses
- Identify how best to maximise effectiveness of an online FHRS system.

For the objectives of this study researchers used a process called iterative thematic analysis, where key themes are drawn out through a process of experiences, discussions and exploration of data.

1.5 Sample

Focus groups were held in Cardiff (x2) and Wrexham (x1) with a mix of rural, suburban and urban residents. All groups were recruited to include a spread of social grade and an even mix of gender. The two Cardiff groups were split by age, with one older (aged 40+) and one younger (18-39), whilst participants in the Wrexham group were recruited to have a spread of ages. Due to the restricted number of groups, Socio Economic Group (social class based on income and occupation of the head of household) was left to fall out, rather than by quota.

Respondents were recruited using a qualitative recruitment screener that ensured they met all of the necessary key participant criteria, namely:

- Awareness of the FHRS scheme
- To have ordered food online (takeaway) in the last 12 months

Food Hygiene Rating Scheme Online Display in Wales: The role of food hygiene in decision-making

2.1 Hygiene and cleanliness sit amongst a wide range of factors consumers value when making choices about food

Consumers seek out various types of information when choosing places from which to purchase food (whether as a takeaway, sit down meal, etc.). Participants told us about a wide range of factors including:

- **More functional factors** such as location, budget, menu options, parking provisions, child-friendly, ease of parking/travel, caters to dietary requirements
- **More emotional, subjective factors** such as taste/flavour of food, ambience, brand equity,

The priority of importance of these factors is highly dependent on the individual and the specific occasion, such as who else they are eating with, their mood or their personal tastes. However, hygiene and cleanliness are almost always factored into the overall decision-making process to some degree.

2.2 Hygiene is particularly difficult to source information about online

While consumers may feel that some factors are particularly important in their decision-making process, this does not always translate into ability to easily access information about that factor. For example, things like menu options, budget or location tend to be very easy to gather information about online, usually via a search engine or an FBO's own website.

Information about how the food will taste or the 'quality' or provenance of ingredients, for example, can be more difficult to unearth. Similarly, participants told us that hygiene and cleanliness feel particularly difficult to find information about online.

2.3 Currently consumers often use proxies to help determine hygiene and cleanliness

In order to resolve this tension, people often use proxies to determine hygiene and cleanliness. On a FBO's physical premises, consumers may use factors like the look and feel of a restaurant, a 'sense' of a clean kitchen (particularly where premises has an 'open' kitchen), the quality of customer service and an inspection of the food on offer (alongside knowledge of a hygiene rating) to help them decide whether the business is hygienic or not. Online, consumers have fewer options, but may use customer reviews and photos shared by either other customers or FBOs themselves to help determine hygiene and cleanliness.

“Sometimes I call them up so I can hear their voice... You can get a sense from speaking to someone about whether it's the kind of place you'd want to eat at” – Cardiff

2.4 'Higher end' establishments have an expectation of cleanliness and quality, whereas food hygiene is more of a concern for takeaways

For high-end establishments, food hygiene tends to be taken for granted and is more of an expectation. Conversely, hygiene is more top of mind for fast food, takeaway and casual dining establishments. Using online channels raises consumer concerns even more due to:

1. The fact that consumers cannot use cleanliness cues 'in store' as a shorthand for food hygiene and
2. Recent media coverage of business practices of online food businesses i.e. "dark kitchens", lack of quality control by aggregators

"[when you're online] you can't see the rating on the door" – Wrexham

"There was something in the news today – basically that they had just got some kitchen things set up in car park portacabins and they were making it there.... It was sort of skirting round hygiene stuff and environmental hygiene.... So that's in the back of my mind" – Cardiff

Food Hygiene Rating Scheme Online Display in Wales: The online Food Business Operator landscape

3.1 Online is increasingly the main channel for discovery and the first touchpoint consumers have with Food Business Operators (FBO)

Whether looking for somewhere new to order a takeaway from or researching restaurants for an occasion meal out, many journeys now start online. Participants told us that when they're seeking out a new place to eat, they would normally either go straight to Google or JustEat, the latter particularly true for takeaways or home delivery.

However, journeys don't always stay purely online or purely offline. Even when a research process has begun online, consumers will often use a variety of channels during the process. These may include reading customer reviews (online), asking family or friends for recommendations (online, face-to-face, on the phone), making enquiries with an FBO (online, face-to-face, on the phone), reading FBO websites for additional information like location, price or menu choices (online).

3.2 Younger consumers are increasingly making use of aggregators, and taking a more 'flirtatious' approach to FBO choice

While many consumers still tend to stick to what they know, and rarely try out new food establishments, there may be a cultural shift emerging with younger consumers more likely to

make use of online aggregators and to say they experiment more with different FBOs.

[Younger] “Nowadays I feel like I’m always trying something new” - Cardiff

[Older] “When you order from home you tend to always use the same places don’t you” - Cardiff

3.3 Consumers don’t feel that different rules for online and offline make sense

Consumers are already using a mixture of online and offline channels when it comes to researching and interacting with FBOs. To them these don’t feel like different universes and therefore drawing a distinction between the two channels for FHRS display is described as inconsistent.

“Why shouldn’t they have to show them online?” - Wrexham

[Older] “Why should they be allowed to hide them online if they have to show them in the restaurant?” - Cardiff

3.4 Customer reviews are simultaneously relied upon and unreliable

Customer reviews are particularly heavily relied upon. Almost all participants we spoke to were using JustEat, Google and TripAdvisor to access customer reviews. These channels are often the only way to assess certain elements of an FBO from the quality and taste of the food, to customer service, to cleanliness and hygiene. People also use reviews in different ways. Some only read negative reviews whereas for others the number of reviews is key.

[Younger] “I just go on the review. I look for other people’s experiences” – Cardiff

“I’m sort of comforted by the fact that people have reviewed it” – Wrexham

At the same time, customer reviews are thought difficult to rely on. It’s difficult to verify their authenticity. It is felt that both positive and negative reviews could be falsified or be the result of a ‘bad day’, one-off mistakes, or different tastes. Some participants feel reviews also say a lot without saying that much. For example, it can be unclear whether the reviewer liked or disliked the menu, the food, the customer service, the atmosphere, the delivery times, or any other factor.

[Younger] “I think you can’t go on the review too much - different people have different tastes” – Cardiff

[Older] “You could be a family friend of that restaurant and you could go on there and do a really good review” – Cardiff

[Younger] “But people who have eaten it can’t tell me if it’s come from a safe place” – Cardiff

3.5 There is a gap for a more reliable, consistent source of information about hygiene

As described above, the current information landscape is piecemeal. Consumers tend to develop strategies for navigating it by using various, disparate pieces of information to make quick, off-the-

cuff choices about food.

Consumers are able to navigate the current information available to them despite its random state and aren't actively complaining about gaps. However, if given the opportunity, they would rather it be more reliable and standardised. There is therefore a gap for credible, reliable information to help consumers make evidence-based, safe choices about food.

3.6 Online display of FHRs would be welcomed as a reliable source of hygiene information

FHRs ratings are well recognised and already well used on FBOs' physical premises. Although awareness of the FSA is mixed and consumers understanding of what the ratings represent are varied, they are seen to provide a useful at-a-glance guide to help inform their decision making.

However, most understand the ratings to come from an "official" inspector. As such, FHRs is understood to come from a reliable and independent party – a welcomed change to the current milieu of inconsistent and unreliable information. Prominent FHRs ratings would appeal as a pillar of consistency and trust in a hard to navigate sea of information.

Food Hygiene Rating Scheme Online Display in Wales: Optimisation of FHRs online display

4.1 Consumers see no reason why mandatory online display shouldn't apply to all FBOs

Online display feels appropriate for all food businesses (including hotels, restaurants, community centres, supermarkets etc.).

[Older] "Anywhere that sells food should have it" – Cardiff

[Older] "If they put it on their doors then why shouldn't it be on their websites - people still eat the food from there?" - Cardiff

"And if the ratings were high, you'd think they'd be proud to show it" – Wrexham

4.2 The execution of FHRs online display could affect its impact

Consumers had several concerns about the ways in which FHRs ratings might be displayed, and how businesses might be able to circumvent regulations to lessen the impact of FHRs online display.

Consumers were concerned that businesses might be able to "hide" the information in obscure places on their website, or even that they might be able to post "fake" or out-of-date ratings. It may be possible to tackle these issues by requiring that a rating is displayed in a prominent place on the website as well as requiring that the embedded images of the rating contain a link to the specific FBO listing on the FSA website.

By directing consumers to the FSA website, this might also work to clarify consumers' questions about the scheme.

[Older] “But who’s checking that they’re using a real rating on their website? Why wouldn’t they just put a picture of a 5 on there?” – Cardiff

4.3 Making FHRs ratings easy and convenient to access is key

Consumers are already navigating a haphazard information landscape in a quick-fire, rapid manner. As such, information that is not delivered front-and-centre, or requires special effort to access, is likely to be overlooked or even ignored.

To maximise impact, FHRs ratings should:

- Be displayed prominently
- Not require consumers to scroll or click through website pages or external links
- Not be hidden in small print

“I wouldn’t like to go through all that effort, I would want it right there in front next to the logo. I wouldn’t bother if it was right at the end” – Wrexham

4.4 There is appetite to extend FHRs online onto aggregator sites and beyond

Consumers agree that FBOs’ own websites are the most intuitive and expected location for FHRs displays, given that they exist offline too. However, there is also a strong appetite for the ratings to appear on aggregator websites, particularly as usage of these sites is becoming more regular. Indeed, some participants think FHRs ratings should also appear on Google searches in the way starred review ratings currently do.

Consumers are eager that aggregators should display ratings in the same way and that they are positioned clearly and intuitively on websites. Some would also like the ability to sort results by FHRs for ease of comparison.

[Older] “If Deliveroo are representing these places, they [FHRs scores] should be on it too. Why not?” - Cardiff

[Younger] “You should be able to compare their hygiene rating on the overview list on JustEat just like you can with distance and the star rating” – Cardiff

4.5 Consumers feel that online display could have a positive impact on FBOs

Overall, consumers feel that online display would have a positive impact on FBOs. They suggest mandatory online display could:

- Help smaller and newer businesses compete and stand out against large chains with stronger brand equity and high street presence, particularly if they had yet to receive many reviews
- Encourage greater compliance from FBOs thus improving quality

“For the restaurant, it would look more professional to have it on there” - Wrexham

[Older] “They’d have to work more for it. Keep them on their toes” - Cardiff

[Younger] “You’d be more likely to order a meal with them if you knew it was a 4 or a 5. If it was a 2 or a 1 you’d be like ‘I’m not going there’ even if the reviews were good” – Cardiff

Food Hygiene Rating Scheme Online Display in Wales: Conclusion

5.1 Conclusion overview

On the whole consumers are quite confident navigating the landscape (selecting restaurants and takeaways) and there is no real unmet need for help with selection. On balance, consumers are not demanding additional help, and are currently making do with a range of different criteria (including reviews; WOM) to help inform choices and decisions.

That said, the information available to help inform their decisions is haphazard, vague and difficult to verify. Information about hygiene is not understood to be readily available, and consumers often either aren’t aware of the ability to look up FHRS ratings online, or don’t consider seeking it out. FHRS information is regarded as credible, independent and verifiable giving it a ‘legitimacy’ that reviews and recommendations do not. If well executed, FHRS online display would be a useful addition to consumers’ repertoire of key information.

5.2 Research objectives

What follows is a summary of answers to the specific research questions listed above.

How and where should the ratings information be signposted to maximise customer awareness and use?

It is critical to consumers that FHRS information be clearly displayed. Consumers wanted FHRS ratings displayed in a prominent place on the FBO websites.

What drives consumer reactions and preferences?

As consumers are already navigating an inconsistent landscape it is critical that information is delivered overtly and clearly so that it can be easily seen and understood.

How high is the risk of misunderstandings or other barriers arising?

On this evidence, there is little risk that consumers will misunderstand food hygiene ratings online. Barriers to use (and confidence in the system) could happen if consumers feel FBOs are able to hide or fake ratings.

What strategies might help to prevent confusion and maximise accessibility?

To maximise impact, FHRS ratings should:

- Be displayed prominently
- Not require consumers navigate through websites or external links
- Not be hidden in small print

What are the best means of presenting the ratings so that consumers can easily access meaningful information that empowers them to make informed choices?

As well prominently displaying FHRS ratings, consumers are requiring that the embedded images of the rating contain a link to the specific listing on the FSA