Findings from a survey of Small and Medium Food Businesses

Prepared by The Research Perspective Ltd

on behalf of

The Food Safety Authority of Ireland

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1. Executive summary

Research Methodology background

The research was based on a Computer Assisted Telephone Interview (CATI) survey of 1,005 food businesses including representation from businesses engaged in food production, food retail, food service (including catering) and food wholesale and distribution. The scope of the research was to focus on SME businesses defined as businesses with up to 50 employees.

The respondents were the people in the business responsible or jointly responsible for food safety and compliance with food safety legislation with 86% of respondents identifying themselves as the owner or manager.

The research was conducted during September and October 2011 with businesses selected at random for participation.

Interaction with agencies and compliance issues for food business operators

There is a high level of awareness of FSAI as an organisation – although food businesses often associate other organisations (such as the HSE) which carry out the food inspections with the role of ensuring compliance with food safety and hygiene standards – and not FSAI.

Whilst a small majority of businesses do not find compliance with the food regulations challenging a significant minority face a number of challenges. However, most businesses perceive the inspectors positively – highlighting in particular the value of the inspectors' advice and recommendations.

There is a high level of awareness of FSAI as an organisation (95% of food businesses are aware of FSAI) and a reasonable association between FSAI and its role as the body responsible for ensuring compliance with food safety and hygiene standards and laws (37% spontaneously identified FSAI as responsible). The role association must be considered within the context that food inspections are carried out on behalf of FSAI by third party Official Agencies such as the Health Safety Executuve (HSE).

Among businesses inspected for the first time (including businesses first inspected in 2007 or more recently), most became aware of the inspection process from previous experience in a food business (70%) or from a food inspector visiting (15%). A small majority (56%) did not find compliance with food regulations challenging with regard to the associated cost, the time required, compliance with structural requirements, accessing training, dealing with the responsible authorities, and setting up the HACCP system. However, a significant number of new food businesses (22%) did state that they encountered significant challenges in 3 or more of these areas. Information supporting compliance and understanding of what is required is high among food businesses (97% and 87% respectively). However, 18% of the businesses recently inspected for the first time still stated that they had difficulty complying with some aspects of the regulations during that inspection process.

With regard to the experience of the periodic food inspections, a similar proportion of businesses (19%) stated that they encountered difficulty complying with the regulations.

For most food businesses the only interaction with the authorities would be via the inspector who visits their business. Consequently, to understand compliance difficulties for small food businesses it was necessary to understand their views on this key relationship. The perceptions of the inspectors carrying out the food inspection was very positive among both those inspected for the first time and those recently inspected across all aspects measured (scores of 85% and higher). The inspectors are regarded as supportive and easy to work with by most respondents and this was typically related to the value of the advice and recommendations provided during the inspection process.

The research found that although a small majority of businesses (57%) claimed awareness of the potential to appeal decisions of the inspector, only 41% correctly identified the point of appeal. 6.8% of businesses were both aware of the potential to appeal and believe that they had had grounds to appeal in the past with 1.8% stating that they did lodge an appeal. Among these, most (83%) were satisfied with the way the appeal was handled.

Impressions of food safety legislation impact on small food businesses

Food business perceive food safety regulations as the most demanding of government regulations in terms of time and effort required for compliance.

A majority of food businesses recognise the benefits of food regulations to their business – however many regard them as stricter than necessary although they do not believe that they hinder the growth of their business.

Food safety regulations are seen as the most demanding of government regulations in terms of time/effort required with 63% of food businesses rating it as one of the top three most time/effort intensive and 32% rating it as the most time/effort intensive. Nevertheless, the benefits of food safety standards to the business is generally acknowledged with 72% of respondents stating that the regulations helped their business by building consumer confidence and 78% stating that they helped increase consumer confidence in food businesses in general.

Many businesses believe that the food safety standards are stricter than they need to be (45% agree), and require too much time to comply with (34% agree) and too much investment (32% agree). Furthermore, a minority of food businesses believe that the food safety requirements are applied equally (48%) and 62% believe that they are applied consistently across all food businesses.

Nevertheless, most businesses do not believe that the standards hinder the growth of their business (15% believe that they do hinder growth) and only a small minority of businesses (5%) see multiple issues with the current regulations without recognising the benefit for their business from regulation.

Awareness and use of FSAI services by SME food businesses

A majority of food businesses are aware of FSAI's web-site – although most have not visited it.

Awareness and use of FSAI's advice line is low – however this is not necessarily a problem so long as they can access the information in other ways such as the web-site.

Web2.0 technologies (such as Facebook and twitter) provide an opportunity for FSAI to provide a complementary communications channel.

A majority of businesses aware of FSAI are also aware of its web-site (67%) with 38% stating that they have visited the web-site within the last year and 14% regularly using it. Most food businesses which have not visited the web-site are either not aware of the web-site at all or not aware of the type of information available on the site. This provides an opportunity to increase awareness of the existence and value of the site among the wider population of food businesses.

Awareness of the advice line was low among the SME businesses responding to the survey (32% aware) with 2.8% stating that they used the line within the last 12 months. Among those who have used it, 77% were satisfied. It should be recognised that low usage is not necessarily a problem so long as food businesses can access information in other ways. However, 28% of food businesses were aware of neither the advice line nor the web-site. This presents a risk that this group may not be getting access to the information they actually require. Therefore, activities aimed at raising the awareness of the web-site should be closely coupled with those aimed at raising awareness of the advice line.

With regard to the opportunity for FSAI to use Web2.0 technologies to communicate with food businesses, social networks (such as Facebook and LinkedIn) are regarded as the best opportunity for focus and were particularly favoured by food production and food service businesses. However, it must be recognised that opinion on the effectiveness of all Web2.0 technologies as a communications mechanism for FSAI is polarised and therefore Web2.0 must complement existing communications channels. For example, 37% of respondents regarded social networks as an effective option; 48% regarded them as not effective.

Finally, all types of additional communication (such as more notice of new regulations, more guidance on compliance, more online training materials and more promotion of the web-site) were supported as useful additions by the majority of small food businesses overall and in each sub-sector.

2. Introduction

Purpose of the Research

The Food Safety Authority of Ireland (FSAI) is responsible for the enforcement of food regulations in Ireland. Consequently, it's activities impact directly on food businesses. Small food businesses generally lack the resources to facilitate compliance with all of the legal food safety and hygiene requirements and therefore tend to be impacted by the work of the FSAI more than larger food businesses. The food industry is key to the economic development of Ireland and small food businesses are the life-blood of that development. It is essential that State Agencies like FSAI, understand the impact that their work has on small business development in order to design effective strategies to minimise that impact without compromising the protection of public health. This research was commissioned as the first part in a strategy to fulfil that purpose.

Scope of the research

The Food Safety Authority of Ireland (FSAI) commissioned The Research Perspective Ltd to conduct market research into food businesses within the Small to Medium Enterprise category[1]. The scope of the research was:

- To characterise the barriers to the set-up and development of small and medium food producers and food businesses in Ireland;
- To evaluate the usefulness of the compliance information and aids currently provided by the FSAI and identify any gaps or room for improvement;
- To gain an insight into services which could be improved in order to assist the development of small and medium food businesses within the limitations of the FSAI mandate;
- To gauge the effectiveness of the relationship between small food businesses and their key contact with the authorities; the food inspectors;
- To include representatives of the diverse sub-sectors. For example, to include all types of food business such as food producers, wholesalers, convenience stores, restaurants and mobile food vans.

SME businesses involved in all aspects of the production and supply of food products were included. These were categorised into four sub-sectors within the food industry:

- ***Food producers***: Businesses responsible for the production of food products from raw or part processed ingredients. These were divided into, producers of food of animal origin, food of non-animal origin and consumer foods (such as pizza);
- ***Food retailers***: Establishments providing food for consumption off the premises. Typical categories of retailers include convenience stores, butchers, supermarkets, green grocer or fishmongers;
- ***Food service (including catering)***: Establishments providing food for consumption on the premises. This sub-sector includes categories such as restaurants, cafes, hotels, pubs, canteens, takeaways, and mobile catering;
- ***Food wholesalers and distributors***: This sub-sector includes all establishments delivering food products to other businesses for onward supply to consumers (This may also require storage of food products prior to delivery).

[1] For the purposes of this research the definition of a small to medium business is one with less than 50 employees.

Audience

The primary audience for this report is FSAI management and staff involved in the definition and delivery of services and supports to SME food businesses. The secondary audience for this report is food industry and government stakeholders.

The audience is assumed to have some familiarity with the process of food inspection, the general structure and terminology associated with the food industry and the scope of services currently provided by The Food Safety Authority of Ireland and on its behalf by agencies undertaking food inspections.

Overview of food businesses and food safety regulation

The FSAI is a consumer protection science-based body charged by the Irish Government to enforce food laws in the Republic of Ireland. This responsibility is laid down in the Food Safety Authority of Ireland Act 1998 as amended. The FSAI carries out this responsibility through a small central staff and a wider food safety professional service consisting of inspectors and related administrators in other Government bodies. The enforcement of food law is therefore conducted by these Official Agencies who work under a service contract arrangement with the FSAI.

Different Official Agencies have different enforcement roles. For example, amongst other roles, the Environmental Health Inspectors working with the Health Service Executive inspect food service and retail businesses whereas veterinary inspectors working for the Department of Agriculture, Food and the Marine inspect food businesses earlier in the food chain handling foods of animal origin like meat. In total there are 37 Official Agencies, which in addition to the two previously mentioned, include the Sea Fisheries Protection Authority, local authorities, Marine Institute and National Standards Authority of Ireland.

The FSAI coordinates the activities of the Official Agencies. However, FSAI also support their work and facilitates compliance of food businesses with the food law through training and provision of information like guidance documents, leaflets, factsheets and other communication resources. The FSAI has a web site where its support materials can be found and it also runs an advice line to address enquiries from a wide range of customers including inspectors, food businesses and consumers. The FSAI interacts with food businesses through its Consultative Council and several sector specific food business fora. For further information on the activities of FSAI see the FSAI annual report: http://www.fsai.ie/FoodSafetyAuthorityofIrelandAnnualReport2010.html

Notes on the research findings

The following notes apply to the findings presented in this report:

1. Unless otherwise stated, all graphs show the responses of the 1,005 participants in the research;

2. Unless otherwise stated, all graphs at a sector level show the responses of 168 food production businesses, 468 food service businesses, 252 food retailers and 117 food wholesale or distribution businesses;

3. Percentage breakdowns are rounded to the nearest whole number integer. This approach is taken to retain the integrity and accuracy of the results. This means that the percentages breakdowns shown may not sum to 100%. Any deviation from 100% reflects the impact of rounding.

3. Summary of Methodology and profile of respondents

The objectives of the research were addressed with a Computer Assisted Telephone Interview (CATI) based survey of 1,005 food businesses out of a potential population of approximately 68,000 food businesses. The telephone interviewing was completed during September and October 2011 with respondents selected at random from validated lists of food businesses.

The research sampling framework was designed to include sufficient representation of each of the sub-sectors as well as representation of different categories of business within each sub-sector (as distinct from a sampling framework which is strictly in proportion to numerical distribution of sub-sectors among the entire population of food businesses). The distribution of the 1,005 businesses included within the research across the four sub-sectors is shown in Figure 1.

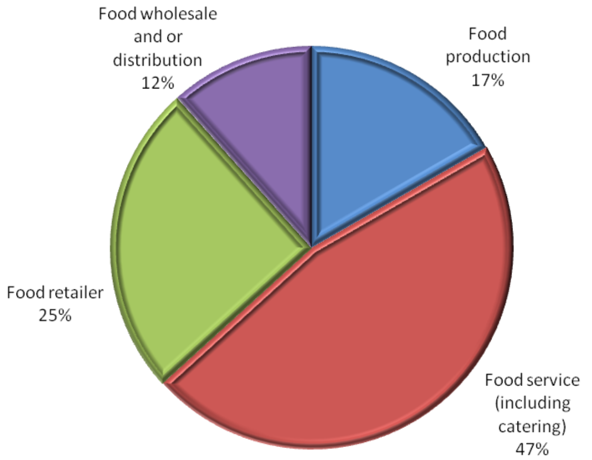

Figure 1: Distribution of respondents by sector

Within each business, the respondents to the telephone survey were the individuals responsible for food safety and compliance with food safety legislation within that business. This was necessary in order to capture the attitudes of the business to food safety regulation and laws. Reflecting this selection criterion, 86% of respondents identified themselves as either the owner or general manager with the balance fulfilling diverse roles including chef, quality manager and operations manager.

Figure 2 shows the breakdown of the inspecting agencies for businesses among respondents asked about their most recent food safety inspection.

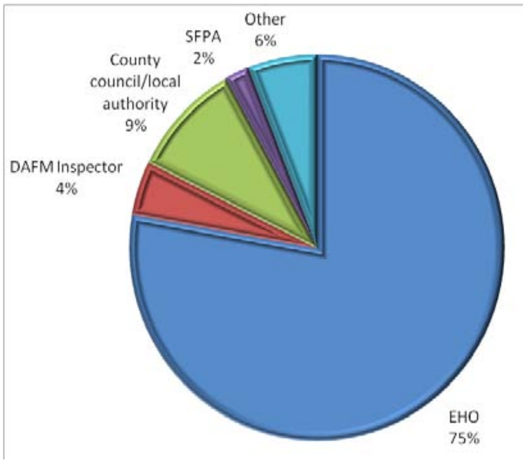

Figure 2: Reported affiliation of inspector who carried out most recent inspection (n=-648)

The research focused on small to medium businesses, defined within the context of this research to mean businesses with less than 50 employees. The distribution of respondents is by size of business is shown in Figure 3.

Additional details on the profile of participants by annual sales and age of business as well as breakdowns by sub-sector are provided in Appendix 1.

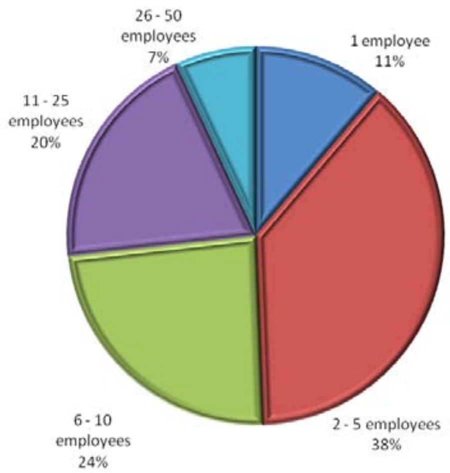

Figure 3: Distribution of respondents by number of employees

4. Interaction with agencies and compliance issues for food business operators

This section reports on

- The perceived image of The Food Safety Authority of Ireland among food businesses;
- The experience of food business of food safety inspections. The experience of the original inspection (for recently established businesses) and the most recent inspection (for those established longer) are reported separately reflecting the potentially different impacts;
- Awareness of the appeals process among food businesses, use of that process and experiences where an appeal was submitted.

Awareness and image of The Food Safety Authority of Ireland

To assess the level of awareness of FSAI, it is necessary to consider two metrics:

- Assessment of name awareness measured by responses to the question: "Are you aware of The Food Safety Authority of Ireland";
- Assessment of role awareness and in particular the degree to which FSAI is spontaneously associated with compliance with food safety and hygiene standards and laws. The spontaneous association was assessed with a survey question which asked respondents to name organisations responsible without providing a list of options for the respondent to choose from.

When considering the results of these awareness metrics, it should be noted that FSAI has limited interaction with most food businesses because the process of inspection for compliance to food law is carried out by third parties (such as the Health Service Executive).

The level of name awareness among food businesses of FSAI is high at 95% with similar levels of awareness across each of the four sub-sectors (Figure 4) as well as by number of employees and value of annual sales.

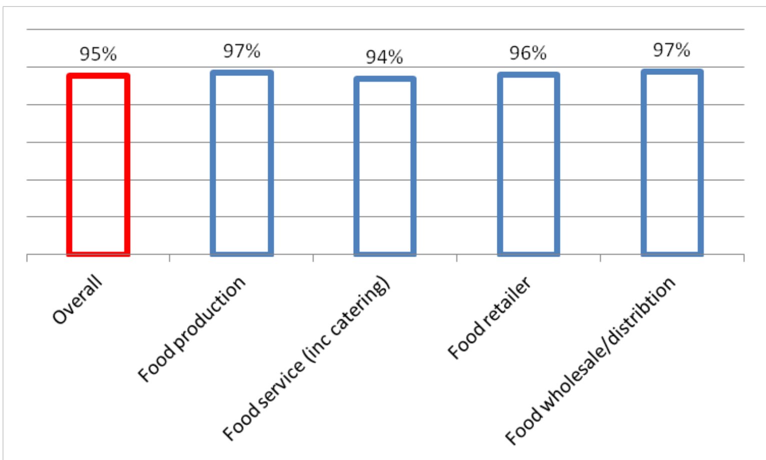

Figure 4: Awareness of the Food Safety Authority of Ireland among food businesses

However, reflecting the limited operational role of FSAI with regard to the key food inspection process, food businesses are less likely to spontaneously associate FSAI with its responsibility for food safety and hygiene standards and laws. Never the less, it can be seen in Figure 5 that FSAI is still associated with this role by 37% of respondents. This is the same score achieved by the HSE, which is the agency inspecting 75% of respondents and should be regarded as a reasonable awareness score. It should be noted that 21% were not able to spontaneously identify any organisation as responsible for food safety and hygiene standards and laws[2].

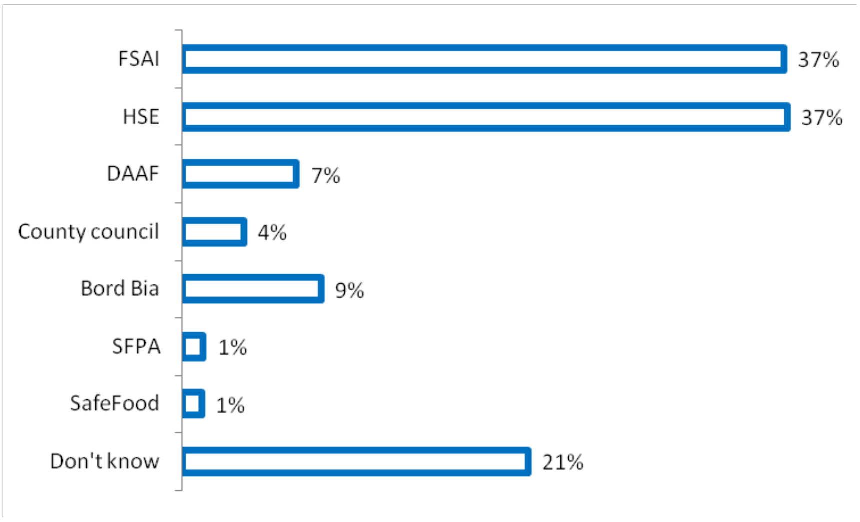

Figure 5: Response to the question: "Can you name the government body or bodies responsible for ensuring that all food produced and sold in Ireland complies with the food safety and hygiene standards and laws?"

The low level of association for the Department of Agriculture, Food and the Marine (DAFM) and Sea Food Protection Authority (SFPA) reflects the proportions of respondents actually inspected by those agencies and is therefore as expected. The association between Bord Bia and food safety and hygiene standards reflects that body's role in quality auditing rather than food safety. The responses at a sub-sector level are shown in Table 1.

[2] To ensure that the responses to this question were not impacted 'prompted', the question was earlier in the survey than the direct questioning of awareness of FSAI. The survey questionnaire is included within Appendix 2.

Names of government body or bobies responsible for food safety and hygience standards and laws	All sectors	Food production	Food service (inc catering)	Food retailer	Food wholesale/ distribution
FSAI	37%	48%	32%	41%	36%
HSE	37%	32%	41%	35%	36%
DAFM	7%	14%	3%	8%	15%
County council	4%	4%	3%	5%	2%
Bord Bia	9%	10%	9%	8%	8%
SFPA	1%	2%	0%	1%	4%
***safefood* (Food Safety Promotion Board)**	1%	1%	1%	2%	1%

Table 1: Breakdown by sub-sector of responses to the question "Can you name the government body or bodies responsible for ensuring that all food produced and sold in Ireland complies with the food safety and hygiene standards and laws?"

This strong association between the affiliation of the inspector and the food safety laws is also seen in the association between the inspector's affiliation and the body the business believes that they are registered with or approved by: 71% state that they are registered with the HSE with smaller proportions stating that they are registered with/approved by local authority, DAFM and SFPA (**Error! Reference source not found.**). All the respondents are operating food businesses and as no food business should legally operate without being registered or approved, it is interesting that 3% did not indicate their awareness of being registered or approved.

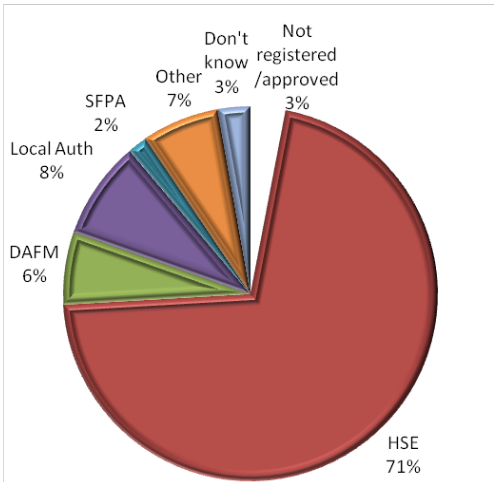

Figure 6: Identity of government body respondent is registered with or approved by

There is a high level of trust that FSAI deals with food businesses fairly (at 80%) with little variation across food production, food service and food retail sub-sectors (Table 2). However, the level of trust among food wholesale and distribution businesses is lower (at 74%) combined with a higher level of disagreement with this statement, although at 7% it is still low.

Do you trust FSAI to deal food businesses fairly?	Overall	Food production	Food service (inc catering)	Food retailer	Food wholesale/ distribution
Agree	80%	82%	80%	80%	74%
Disagree	5%	3%`	4%	6%	7%

Table 2: Percentage of respondents agreeing or disagreeing that FSAI is trusted to deal with food businesses fairly

Involvement of respondents in inspection process

For most food businesses the only interaction with the authorities would be via the inspector who visits their business. Consequently, to understand compliance difficulties for small and medium food businesses it was necessary to understand their views on this key relationship. The research sought to investigate the experience of the first inspection process as well as the most recent inspection. The criteria used for determining whether a respondent was asked about the first inspection or the most recent inspection was:

- Ask about first inspection if the business was established during or since 2007 ***and*** the respondent was directly involved in the first inspection;
- ***Otherwise*** ask about the most recent inspection if the respondent was directly involved in that inspection.

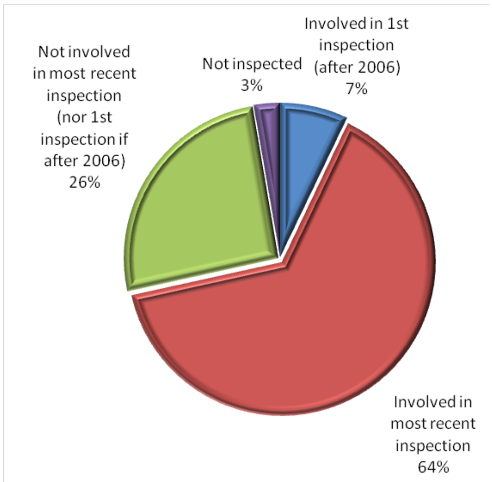

Figure 7: Involvement of respondents in the original food inspection (if 2007 onwards) or most recent inspection (if not involved in first inspection and inspection in 2007 onwards).

Figure 7 summarises that division of respondents into those involved in the recent first inspection (7%) and those involved in the most recent inspection (64%). Recalling that all respondents were responsible for compliance with food safety and hygiene laws, it is surprising that 26% stated that they were not involved in the most recent food safety inspection. This suggests that in these cases the operational issues associated with the inspection may be delegated to more junior staff or staff with other responsibilities (for instance administration) or to a consultant.

Experience of most recent inspection

Of the 648 respondents asked about the most recent inspection (64% of all respondents), most (82%) stated that the inspection had occurred with the last six months with 28% stating it occurred in the last month(Figure 8). This frequency is in line with the normal frequency of inspections.

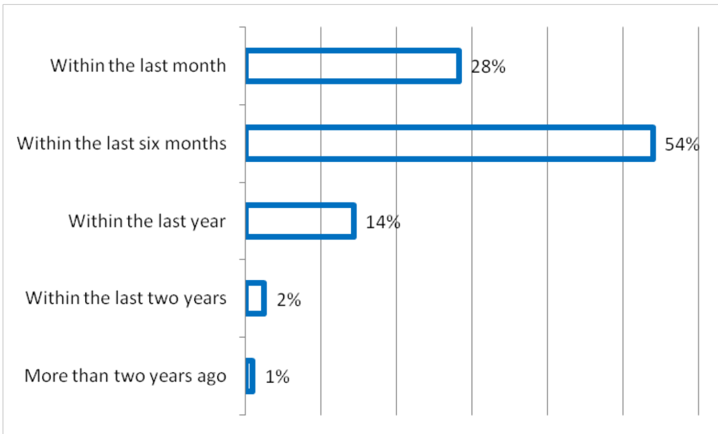

Figure 8: Time of last inspection (n=648)

As these are food businesses which predominantly will have passed previous inspections (those who were at their first inspection were not included within this section of the research), the proportion which stated that they found compliance difficult is relatively high at 19% (Figure 9). Food wholesale and distribution companies and food production businesses were most likely to state that they found regulations difficult to comply with (25% and 24% reporting difficulties respectively). In the case of wholesale and distribution businesses, this result is unexpected as the impact of regulation is relatively low compared to the other sub-sectors.

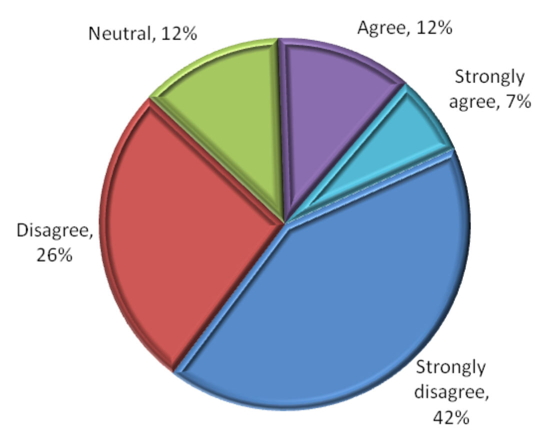

Figure 9: Difficulty encountered in complying with regulations (n=648)

To determine whether compliance was perceived as more onerous on particular sizes of business, the responses were examined and categorised separately by number of employees and by value of annual sales. However, no strong association was found except for those businesses with turnover greater than €2m which were most likely to report food regulations difficult to comply with (Figure 10), where 30% agreed with that statement.

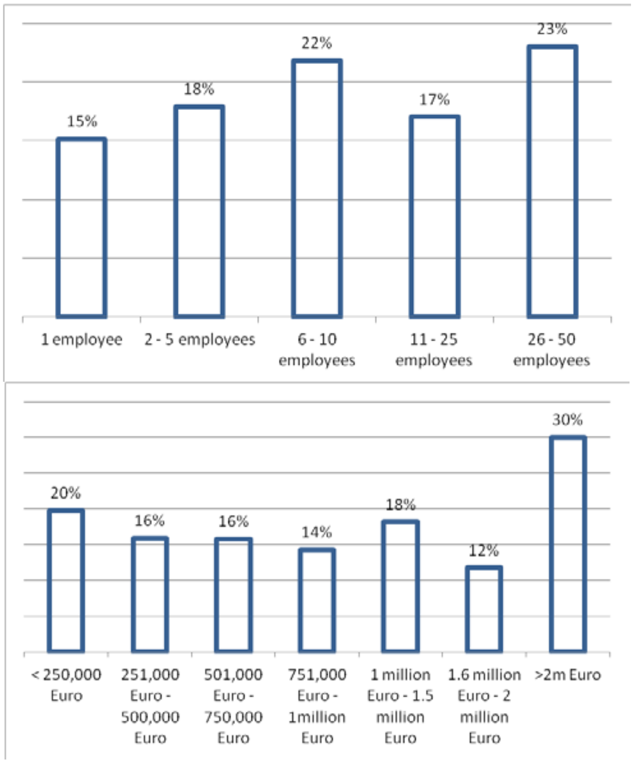

Figure 10: Percentage of respondents finding compliance with food regulations difficult broken down by number of employees and by annual sales (n=648)

The 19% of businesses which reported encountering difficulties in complying with food regulations were asked to select reasons for this difficulty from a set of provided options. Of these, 77% (corresponding to 14% of all respondents asked about their most recent inspection) reported one or more of the tested reasons as reflecting the difficulties they faced with compliance. Figure 11 shows the percentage of all respondents identifying each reason as causing the difficulty with compliance:

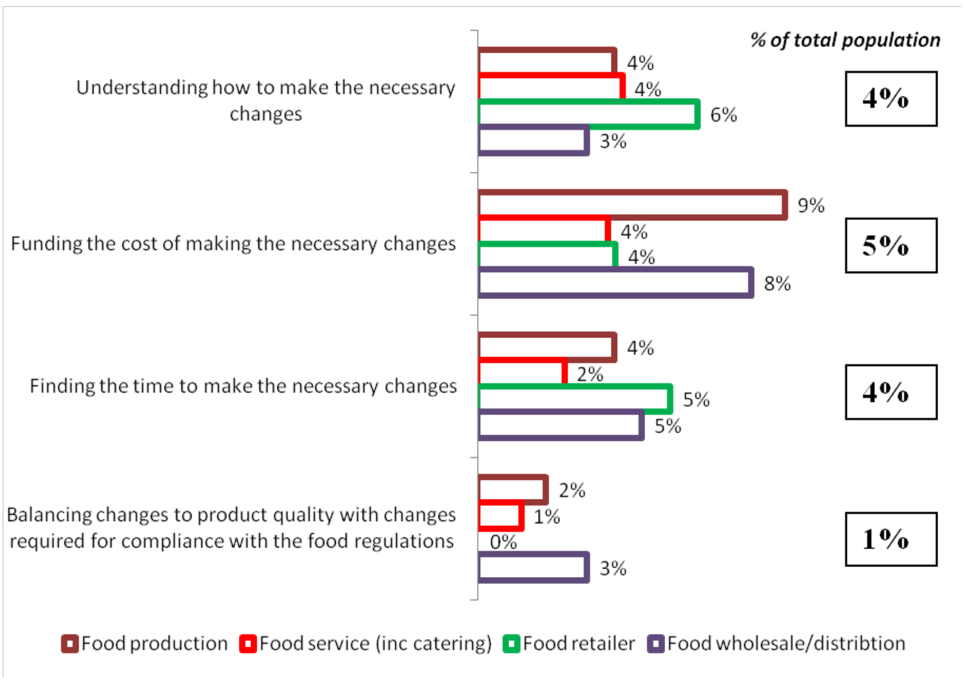

Figure 11: Reasons for finding food regulations difficult to comply with (% of total respondents asked about difficulty in complying with regulation in connection with most recent inspection. n=648)). The figures in boxes reflect the whole population with breakdown by sector shown as bars.

Overall, funding of the required changes (identified by 5% as the reason for difficulty) was the most commonly identified reason. At a sub-sector level, for food production businesses and food wholesale and distribution businesses, this was by far the most significant reason. In the case of food production, their scores are understandable as compliance might require significant changes and investment. However, in the case of wholesale and distribution businesses the response is less easy to interpret as in most cases regulation should not have a large impact on the business.

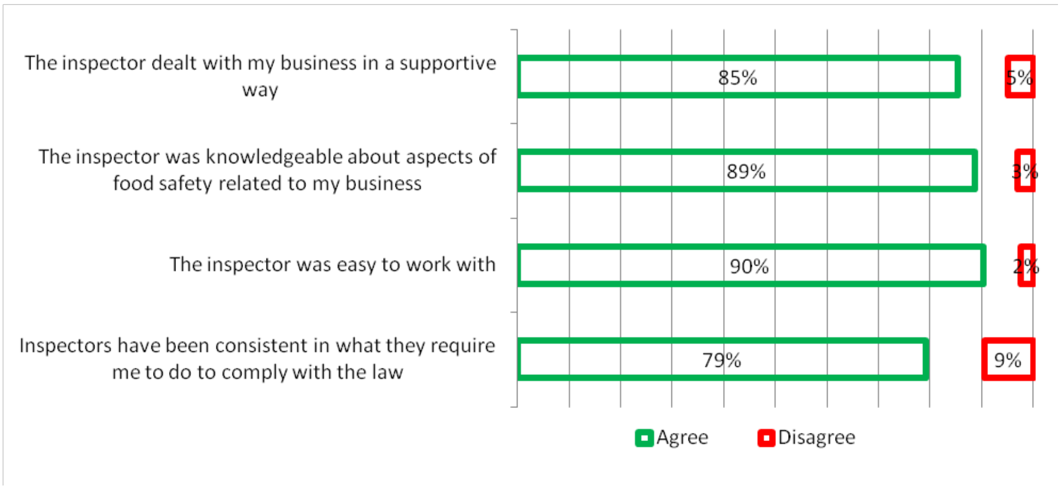

Figure 12: Impressions of the inspector among those involved in the most recent inspection (n=648)

The respondents perceptions of their relationship with their inspector were positive (Figure 12) with most participants considering the inspectors as supportive (85%), knowledgeable about how food safety applies to their business (89%), easy to work with (90%) and consistent (79%).

% disagreeing with the statement that …	Food production	Food service (inc catering)	Food retailer	Food wholesale/ distribution
The inspector dealt with my business in a supportive way	3%	5%	4%	10%
The inspector was knowledgeable about aspects of food safety related to my business	4%	2%	2%	5%
The inspector was easy to work with	2%	3%	1%	3%
Inspectors have been consistent in what they require me to do to comply with the law	7%	10%	8%	13%

Table 3: Impressions of the inspector among those involved in the most recent inspection by sub-sector

An analysis of the percentage *disagreeing* with each statement at a sub-sector level (Table 3) shows the highest levels of negative scores associated with wholesale and distribution businesses. The percentage disagreeing with the statement that *"the inspectors have been consistent in what they require me to do to comply with the law"* across all sub-sectors is highest overall and highest among wholesale and distribution businesses in particular (at 13%).

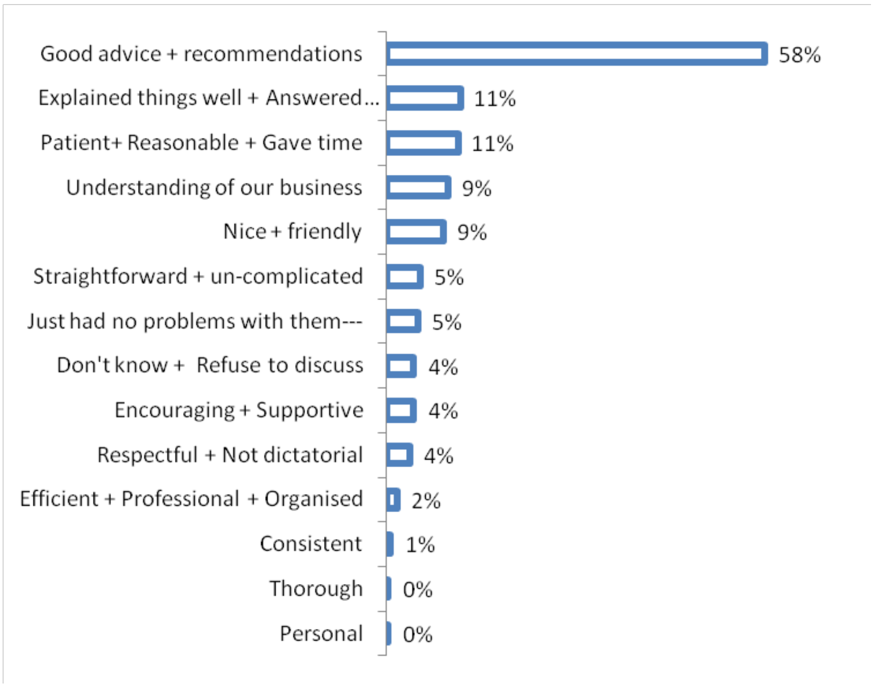

Figure 13: Reasons given for stating the inspector was supportive - spontaneous responses coded into categories (n=309)

The 85% of respondents who stated that their inspector was supportive were asked to describe in their own words the attributes of the approach of the inspector which they found supportive. Figure 13 shows the classification of the responses to this question. The most common reason aired was that the inspector gave good advice and recommendations (mentioned by 58%), with other reasons showing lower percentages.

Similarly, respondents who stated that they found the inspector easy to work with were asked to describe the reasons why this was the case.
Figure 14 shows a classification of the types of comments used by respondents who agree that the inspectors were easy to work with.

Information and advice: *'She prepared a letter in power point form highlighting each problem in the business with suggestions on to improve them...very helpful'*

Prioritisation: *'When we started there was so many problems, but the inspector understood that and was able to help prioritise the issues and what needed done the most'*

Time and scheduling: *'I think she appreciated that we were just starting out, that we had a small turnover. She gave us time to get things sorted out'*

Business understanding: *'She was very helpful, wasn't too pernickety but still carried out her work effectively'*

Engagement and flexibility: *'Inspector was very helpful and gave ideas but didn't force the issue - she understood that we would get things right even if we didn't do it all the way she suggested - not as single minded as some inspectors'*

Support: *'Inspector gave me all the information I need, I can ask her any questions, I am never afraid to talk to her and never dread her coming in - I look forward to her coming in*

Figure 14: Quotes from participants who regarded their inspectors as easy to deal with

As with the reasons for considering an inspector as supportive, the reasons for stating that an inspector was easy to work with focused on the pragmatism and engagement shown by inspectors to food businesses managers and owners.

Experience of first inspection

When a new food business is established it is required to register with the authorities. Some types of food businesses require approval. Food businesses are legally required to comply with any requirements laid down by their inspector following inspection. Therefore, the first inspection is an essential step in the establishment of any food business.

In order to assess the experience of food businesses which have recently gone through this process, a range of questions about the process were asked of respondents in businesses established from 2007 onwards and where the respondent had been directly involved in this first inspection. It was necessary to restrict the set of responses only to those recently established to ensure that the level of recall would be sufficiently accurate. Of the 1,005 respondents in the research, 71 respondents qualified to be asked these questions (approximately 7%). While this is a small number of responses to base conclusions upon, it should be noted that the findings in this section are consistent with those already reported about the most recent inspection and therefore can be relied upon.

The first element to be tested was the level of awareness of the need to be registered or approved at the point in time when the business was established. In 70% of cases, the respondent stated that the source of their knowledge of the requirement to be registered/approved was that they had previous experience of food safety regulations (Figure 15). A further 15% stated that a visit by the food inspector alerted them to the need to be registered or approved. Information provided by FSAI was the source of this knowledge in 11% of cases with a similar number learning about the requirement from managers of other food businesses.

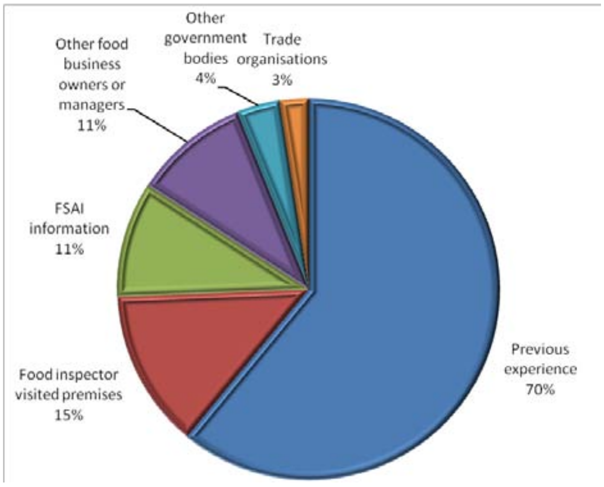

Figure 15: Responses to "*Recalling when you first set-up the food aspects of the business which of the following describe how you found out that you needed to register or approved?*" (n=71)

While the reported level of previous experience of being involved other food businesses is high (at 70%), it is still low when compared to other industries where it would be unusual for owners or managers not to have direct experience from being involved in other similar business previously.

With regard to the potential challenges associated with complying with food safety regulations, respondents were asked to rate a number of potential challenges they might have faced during the first inspection process. Figure 16 shows that a minority of respondents deemed any of the tested challenges to be significant. The challenges with the highest proportion of respondents rating them as significant are the cost of compliance and the effort required to develop and document the food safety management system (HACCP system).

Figure 16: Rating of potential challenges among respondents who have recently been involved in the first inspection of a food business (n=71)

An analysis of how many of the potential challenges impacted on the respondents found that a small majority (56% of respondents) rated none of the challenges as significant while a comparatively high proportion (22%) rated 3 or more challenges as significant (Figure 17). This suggests that supports need to be focused on a relatively small proportion of the new food businesses as most do not find compliance difficult. This is in line with the information driven approach of FSAI and the supportive approach of inspectors.

Comparing the challenges faced by those with existing experience of the food inspection process with those faced by respondents without that previous experience, showed that those without previous experience were most likely to rate *'identifying and accessing appropriate training for you and your staff'* (33% rate it as a significant challenge). In contrast, those with previous experience were most likely to rate the cost of compliance as a significant challenge (at 34%).

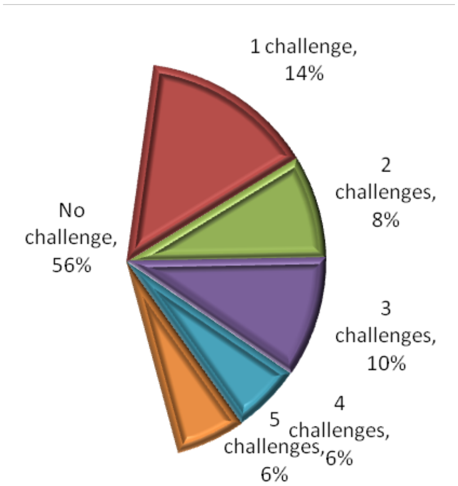

Figure 17: Number of challenges associated with the first food inspection rated as significant by respondents directly involved with recent first inspections (n=71)

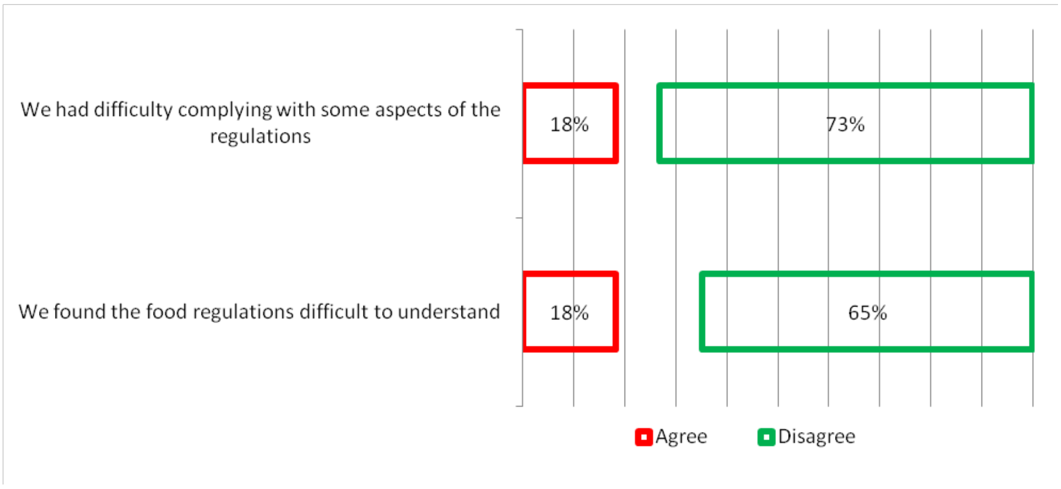

Figure 18: Rating of general challenges with complying with food regulations (n=71)

The degree to which food businesses faced general challenges with compliance was also captured (Figure 18) with 18% agreeing with each statement: *"We had difficulty complying with some aspects of the regulations"* and *"We found the food regulations difficult to understand"*. These are reasonable scores given the centrality of regulations to the operation of these businesses.

An analysis of the responses at a sub-sector level show that retail businesses are considerably less likely to encounter difficulties with compliance (9% agreed with the statement that they had encountered difficulty). This may be due to the technical support of the symbol groups most of the retailers operate under. With regard to understanding the regulations, food production and food retail businesses were also less likely to find regulations difficult to understand (at 7% and 9% respectively).[3]

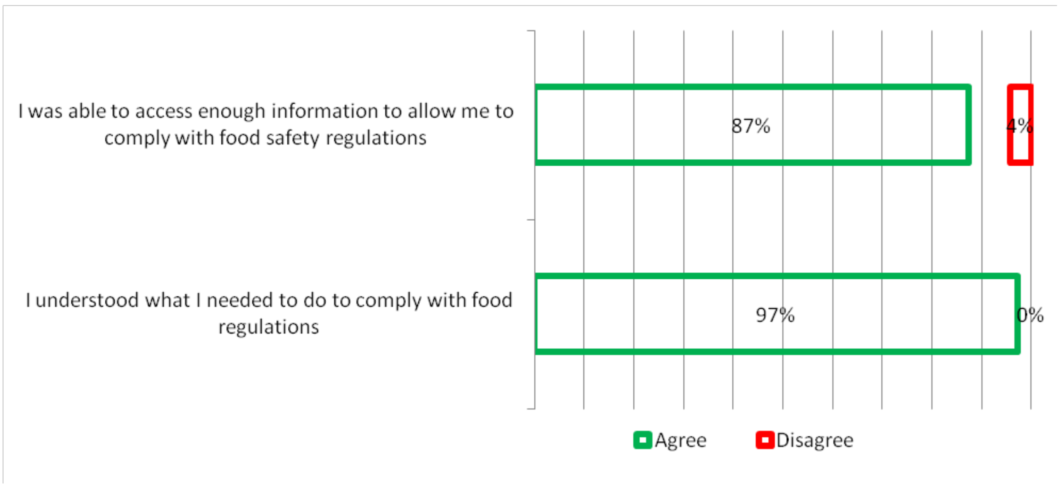

Figure 19: Percentage of respondents finding it easy to access information about food safety regulations and understanding what was required for compliance (n=71)

The finding that most respondents reported not encountering difficulty with understanding and complying with food regulations is reinforced by the responses to questions relating to the availability of information and understanding of what was needed for compliance (Figure 19). Almost all respondents stated that they understood what they needed to do to

[3] It should be noted that there are a relatively small number of responses at a sub-sector level for these questions on the first inspection (where the total number of respondents is 72). Therefore these findings should be treated as indicative and directional rather than statistically robust.

comply (97% agreed with this statement) with 87% agreeing that they were able to access enough information to allow them to comply. The apparent discrepancy between the 18% who stated that they found the food safety regulations difficult to understand and the 0% who disagreed with the statement that "*I understood what I needed to do to comply with food regulations*" reflects the difference between understanding why food regulations were operated in a particular way (the rationale for the regulations) and understanding what needs to be done to comply (the operation of the regulations).

The perceptions of the relationship between the business and the inspector who carried out the first inspection are excellent for knowledge, ease of working with, time given for compliance and supportiveness (Figure 20).

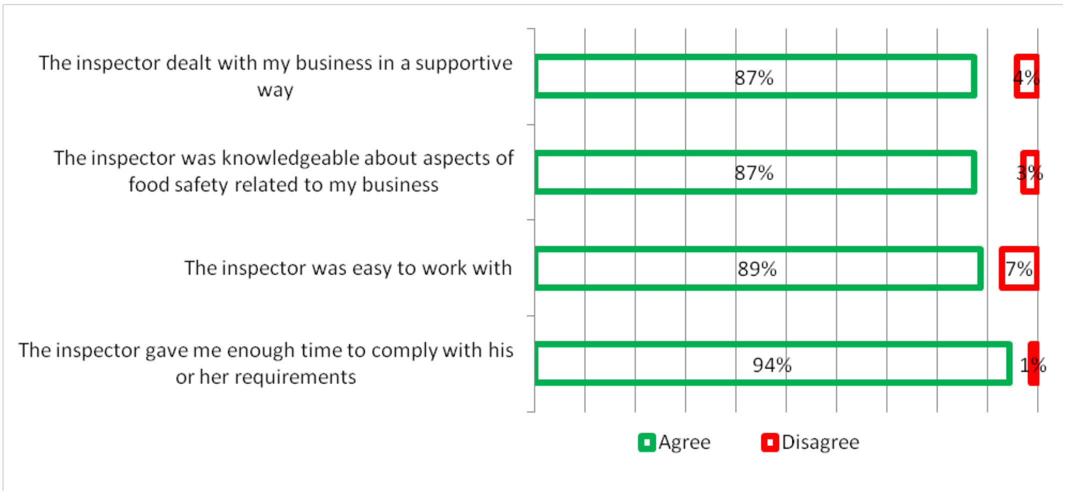

Figure 20: Impressions of the relationship between the business and the inspector among those recently been involved in the first inspection of a food business (n=71)

The respondents who stated that the inspectors were supportive (87%) were asked to explain in their own words in what ways the inspectors were supportive. The most common reason given was that the inspectors provided good advice and recommendations (38% of respondents give reasons related to these areas). Being accommodating, open minded and fair was the second most common reason given (34% of the respondents who stated inspectors were supportive). This is similar to the reasons given by respondents asked about their most recent inspection and reflects the positive experience of the process of food inspection and the approach taken by inspectors.

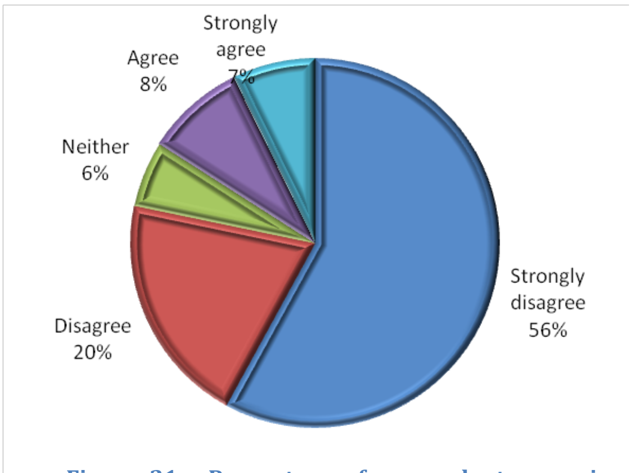

Figure 21: Percentage of respondents agreeing with the statement *"The food safety regulations would dissuade me from setting up another food business in the future"*

Finally, the overall positive experience is also reflected in the responses to the question on whether the experience of the first inspection would put the respondent off from establishing another food business (Figure 21). 63% disagree or strongly disagree that it would put them off. While 15% agree that the experience would put them off establishing another food business, given the importance of the food safety regulations to the operation of a food business and business perceptions towards regulation in general, this should be regarded as an acceptable score.

Awareness and experience of the appeal process

Generally, a food business has a right to appeal the decision of their inspector to more senior staff in the inspecting organisation (such as HSE or DAFM). Appeals processes vary depending on the Agency in charge of inspection. Food businesses are only encouraged to appeal to FSAI if not satisfied with the outcome of the first appeal. However, 43% of respondents to the survey were not aware that there was a right to appeal the decisions of inspectors and only 35% correctly identified the inspector, supervisor or inspector's organisation as the point of appeal. (Figure 22). 4% identified FSAI as the point of appeal (the standard policy would be for food businesses to try to resolve issues locally in the first instance). 16% of food businesses either didn't know who to appeal to or misidentified the correct point of appeal.

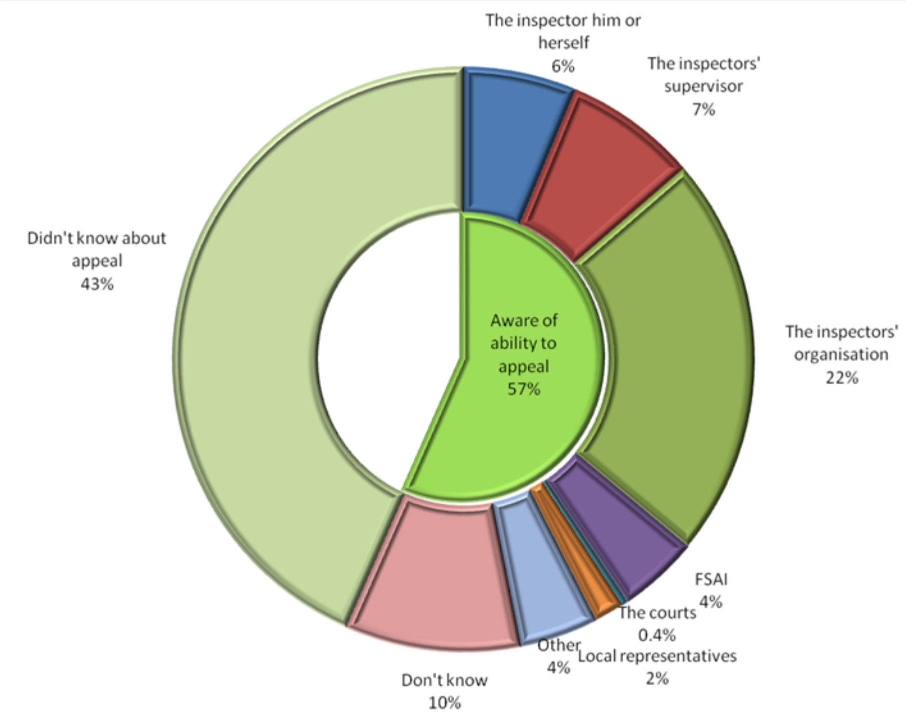

Figure 22: Awareness of appeals process (inner pie chart) and awareness of organisations that can be appealed to be (outer circle)

The proportion of respondents aware of the appeals process varies to a small degree by sub-sector (Figure 23) with businesses in food retail least likely to be aware of the appeals process (at 54%) and food production businesses most aware (at 63%).

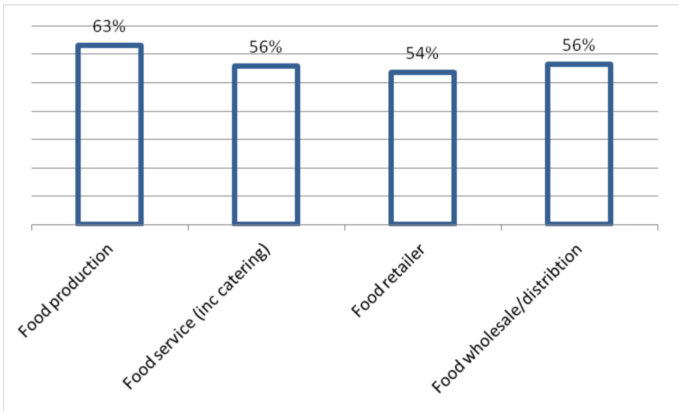

Figure 23: Awareness of appeals process by sub-sector

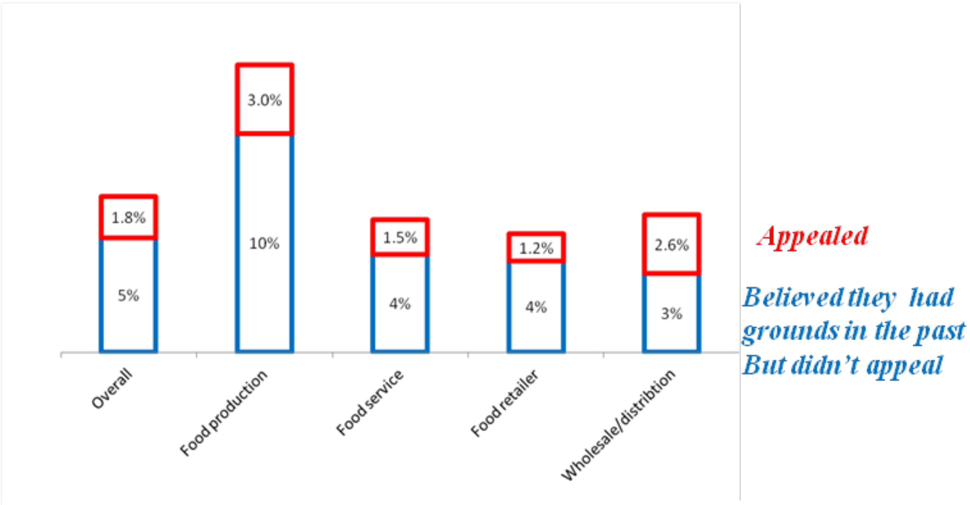

Figure 24: Proportion of respondents (both overall and at a sub-sector level) who state that they have appealed in the past (red bar) and who felt that they have had grounds to appeal but chose not to (blue bar)

The research also investigated the stated prevalence of actual appeals and the proportion of respondents who in the past felt that they had grounds to appeal but chose not to do so for whatever reasons. The research found that 5% believed that in the past they had grounds but chose not to appeal compared to 1.8% who stated that they had grounds and did appeal (Figure 24).

At a sub-sector level (also shown in Figure 24), food production businesses are both most likely to believe that they had grounds for appeal (13%) and most likely to not appeal (10%). In contrast, wholesale and distribution businesses were more likely to appeal if they felt that they had grounds (5. 6% stated that they had grounds, with 2.6% stating that they appealed).

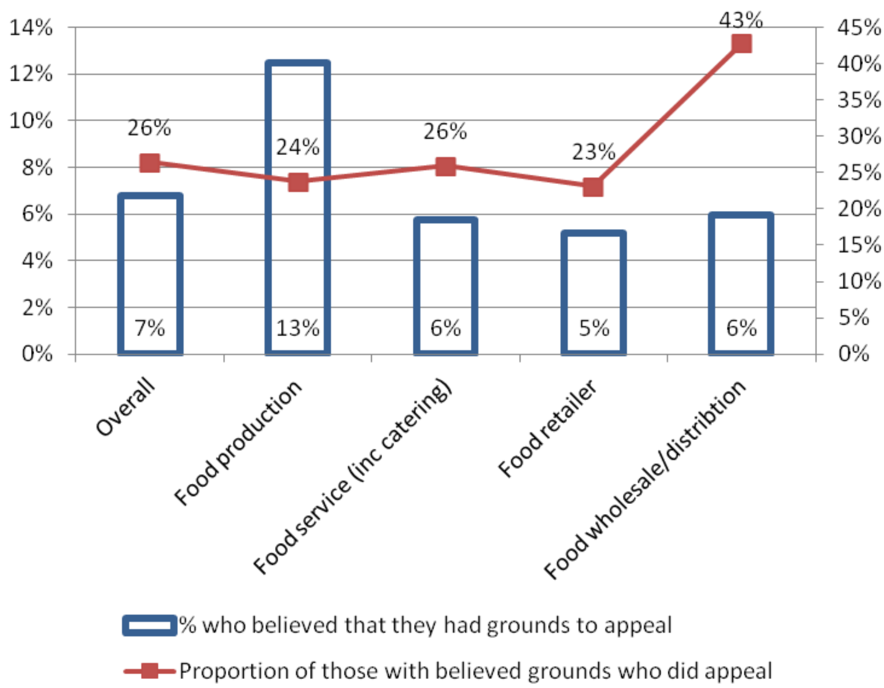

Figure 25: The proportion of respondents stating that they had grounds for appeal in the past (bars) and the proportion of these respondents who actually appealed (red lines). For example 7% of businesses stated that they had grounds for an appeal in the past, 26% of this 7% lodged an appeal.

The rate of appeal (calculated by comparing the percentage which stated that they had grounds for appeal with the percentage that lodged an appeal) is similar across food production, service and retail. However among wholesale/distribution the rate is much higher with 42% of those with perceived grounds for appeal stated that they did appeal (**Error! Reference source not found.**).

Among those who did appeal, most (83%) were satisfied with the way their query or appeal was handled. Given the nature of the likely appeal, this should be regarded as a good score.

Conclusions

There is a high level of awareness of FSAI as an organisation (95% are aware) and a reasonable association between FSAI and its role as the body responsible for ensuring compliance with food safety and hygiene standards and laws (37% spontaneously identified FSAI as responsible). The role association must be considered within the context that food inspections are carried out by third parties such as HSE, so the FSAI does not have front line exposure to their role.

With regard to the most recent inspection, 19% of businesses stated that they encountered difficulty complying with the regulations. Overall, funding the cost of making the necessary changes was cited by 5% with understanding how to make the changes and finding the time to make the changes cited by 4% each.

Among businesses inspected for the first time since 2007, most became aware of the requirement for the inspection process from previous experience in a food business (70%) or from a food inspector visiting (15%). Most did not find compliance challenging across the metrics evaluated such as the cost, the time required, compliance with structural requirements, accessing training, dealing with the responsible authorities, and setting up the HACCP system(56% rated none of these areas as being a challenge with 14% rating one as a challenge). However, a minority of new food businesses (22%) did report encountering significant challenges in 3 or more areas.

Most business which had been inspected for the first time recently (since 2007) understood what they needed to do (97% agreed) and were able to access enough information (87%). However, 18% still stated that they had difficulty complying with some aspects of the regulation and 18% stated that they found the regulations difficult to understand (with regard to the rationale for requirements rather than understanding what was required). Overall, 76% did not believe that their experience of the food inspection process would dissuade them from setting up another food business in the future. This reflects what appears to be an overall positive impact of the inspection process.

The perceptions of business relations with the inspectors was very positive among both those inspected for the first time and those recently inspected across all aspects assessed (scores of 85% and higher). The inspectors were regarded as supportive and easy to work with by most respondents and this was typically related to the value of the advice and recommendations provided during the inspection process.

The research found that there was a low level of awareness of the potential to appeal decisions of the inspector (43% were not aware).

6.8% of businesses were both aware of the potential to appeal and believe that they had had grounds to appeal in the past. 26% of these businesses actually appealed. This ratio was similar across all sub-sectors apart from wholesale and distribution businesses where 42% of those who stated that they had grounds to appeal actually lodged an appeal.

Among those food businesses which lodged an appeal, most (83%) were satisfied with the way the appeal was handled.

5. Impressions of food safety legislation impact on small food businesses

The relative burden of food safety regulation on small and medium food business was assessed by asking respondents to rate the effort required to ensure compliance with food safety regulation in comparison with the effort required to comply with other government regulations (such as the requirement to make VAT returns or to comply with local authority planning). The approach taken to measurement was to ask respondents to select the top three in terms of greatest time and effort required to comply with and then to select the top one from this list of three.

Figure 26 summarises responses to these questions. It is clear that food safety regulations are most likely to be perceived as the most onerous (selected by 32% of respondents) and were also most likely to be selected within the top three in terms of amount of time and effort required to comply with (selected by 63% in the top three). Health and safety regulations were selected as the most onerous by 22% of respondents with 54% listing this in the top three.

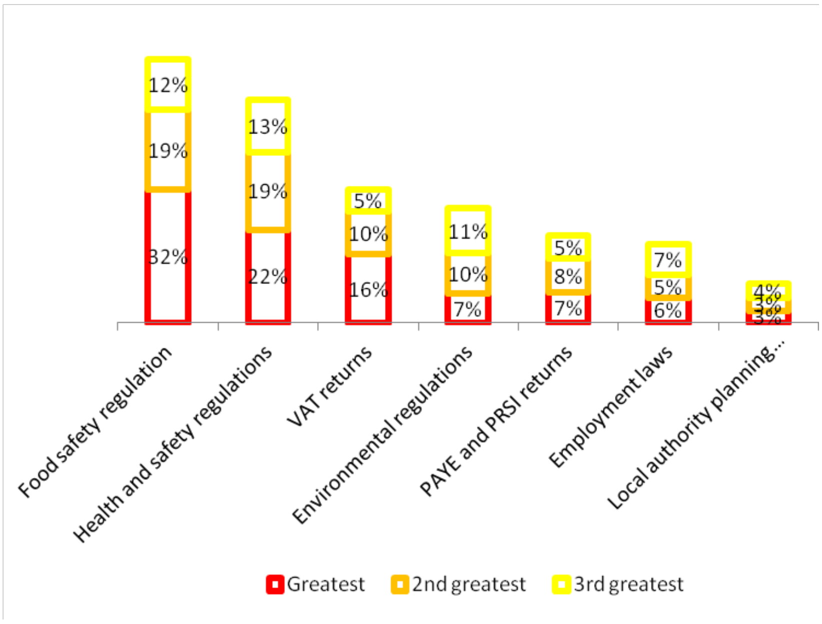

Figure 26: Percentage of respondents selecting each area of government as first, second or third in terms of the amount of time and effort required to comply with the regulation.

At a sub-sector level (Table 4), a similar picture emerges with food safety most often rated in the top three by food production businesses, food service businesses and food retailers. The only exception was wholesale and distribution businesses (where health and safety regulations were selected as top three by 67% of respondents compared to 62% for food safety). Analysis by business size as measured by either sales or number of employees showed that the rating of food safety regulation did not vary greatly across either dimension.

Rating food safety regulations compared to other government regulation	Production	Food service (inc catering)	Retailer	Wholesale / distribution
Greatest amount of time and effort	35%	31%	29%	38%
2nd greatest amount of time and effort	18%	20%	18%	16%
3rd greatest amount of time and effort	10%	13%	13%	8%
Top 3 in terms of amount of time and effort	63%	65%	61%	62%

Table 4: Percentage of respondents selecting each area of government as first, second or third in terms of the amount of effort required to comply with regulation by sub-sector

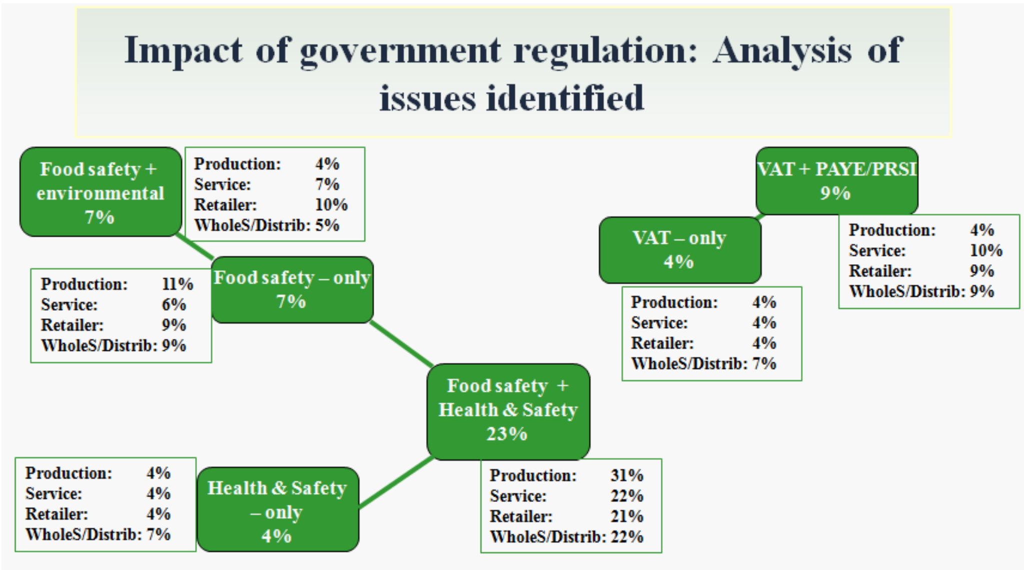

Figure 27: Graphic showing the relationship between the rating of different aspects of government regulation. The graphic summarises proportions of respondents who select individual or combinations of types of government regulation.

Analysing the pattern of responses identifies the most common individual or combinations of government regulations (top two) identified as requiring the greatest time and effort to comply with (The diagram in Figure 27 shows the most common individual reasons or combinations of reasons found). This analysis identified that food safety in combination with Health & Safety emerges as most commonly identified with 23% of all respondents rating these two types of regulation as requiring the most time and effort to comply with. This rises to 31% among food producers.

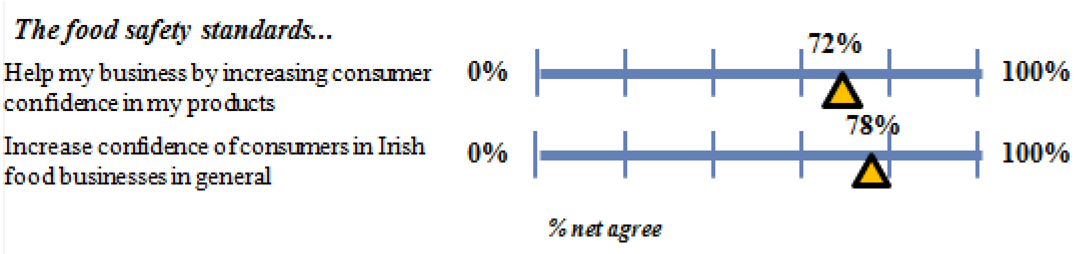

Figure 28: Percentage of food businesses acknowledging potential benefits of food regulation with regard to increasing confidence in the respondents business and increasing confidence in the food businesses in general

The research also sought to determine the degree to which food businesses perceived food regulation as assisting in building consumer confidence in their products and services. To this end, Figure 28 reflects the high degree to which Irish food businesses accept the benefits of food safety standards.

At a sub-sector level, it is clear that businesses in food wholesale and distribution are much less likely to recognise the benefits than those in other sub-sectors (Table 5). However, it should be noted that the wholesale and distribution sub-sector is the only one without direct interaction with the consumer and therefore may not perceive these benefits as much as other sub-sectors.

Do you agree with the following statements...	Food production	Food service (inc catering)	Food retailer	Food wholesale/ distribution
The food safety standards help my business by increasing consumer confidence in my products	76%	73%	76%	57%
The food safety standards increase confidence of consumers in Irish food businesses in general	83%	77%	81%	68%

Table 5: Percentage of food businesses by sub-sector which acknowledge potential benefits of food regulation with regard to increasing confidence in the respondents business and increasing confidence in the food businesses in general

To assess the perceptions of food safety regulations among food businesses, research participants were asked to rate food safety standards in terms of the appropriateness of the level of strictness, amount of time required for compliance, the amount of money required and whether they believe that the standards hinder growth.

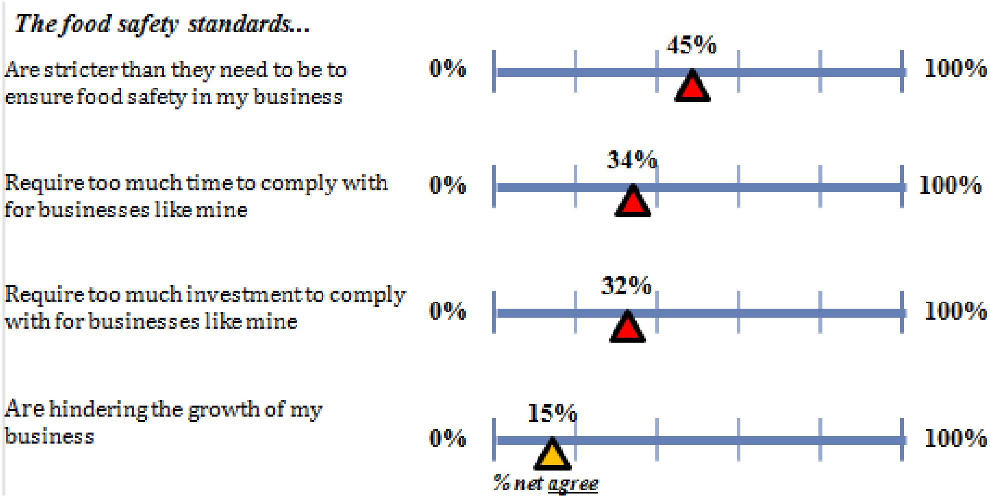

Figure 29: Percentage of food businesses agreeing with statements about negative impacts of food safety standards on businesses.

Figure 29 shows that food safety standards are deemed not to hinder growth by a most food businesses surveyed (15% stated that they hinder growth) but the rating for the appropriateness of the strictness and the amount of time and money score much lower. This suggests that while food businesses perceive the benefits of regulation a significant minority do not believe that the current regulations are appropriately defined.

As with earlier measures, at a sub-sector level the wholesale and distribution businesses are least likely to consider the food safety standards to be appropriately strict as well as least likely to believe that compliance requires the appropriate amount of time and investment (Table 6).

Agree that ...	Food production	Food service (inc catering)	Food retailer	Food wholesale/ distribution
The food safety standards are stricter than they need to be to ensure food safety in my business	50%	46%	48%	36%
The food safety standards require too much time to comply with for businesses like mine	32%	32%	38%	32%
The food safety standards require too much investment to comply with for businesses like mine	36%	30%	30%	37%
The food safety standards are hindering the growth of my business	12%	16%	13%	20%

Table 6: Percentage of food businesses by sub-sector agreeing with statements about negative impacts of food safety standards on businesses.

Finally, the research aimed to determine whether food businesses believe that the regulations are applied in an equal and consistent manner. Less than half of respondents (48%) agree that standards are applied ***equally*** and 62% believe that they are applied ***consistently*** (Figure 30). These scores are much lower than the 80% of participants who stated that they trusted FSAI to deal with businesses fairly and lower than perceptions that the inspector is consistent and the positive impressions of the inspector.

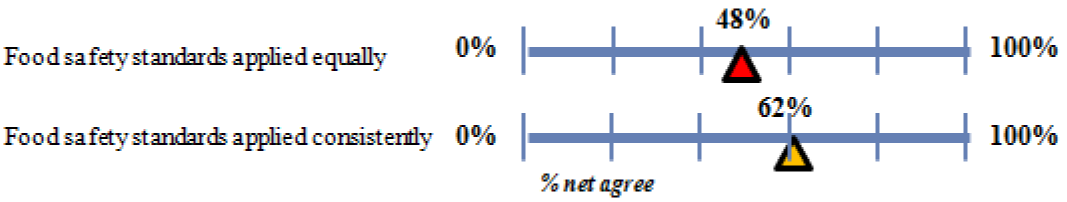

Figure 30: Percentage of food believing that food safety standards are applied equally and consistently

Consistent with the earlier measures, scores for food wholesales and distribution are lower than for other sectors but the scores are low for each sub-sector. Therefore, it must be concluded that these scores when contrasted with the higher scores for FSAI and the inspectors, reflect a concern about food regulation in general (for example understanding why the regulations need to be as strict as they are perceived to be).

Agree that ...	Overall	Food production	Food service (inc catering)	Food retailer	Food wholesale/ distribution
The food safety standards are applied equally to all food businesses	48%	49%	48%	52%	41%
The food safety standard are applied consistently	62%	67%	61%	63%	56%

Table 7: Percentage of food believing that food safety standards are applied equally and consistently by sub-sector

To enhance the understanding of this finding, an analysis of the responses was conducted to identify groups of respondents who are very negatively or positively disposed overall to food regulation by looking at the range of statements tested on the appropriateness and consistency/equality of application of food regulation. This analysis found that

- 42% of food businesses accept the benefits of food safety standards ***and*** do not perceive any of the negatives tested;
- 5% of food businesses perceived few of the tested benefits and also agreed that three or more of the tested negatives applied to their business;
- The remaining food businesses perceived a combination of benefits and negatives.

Therefore, it can be concluded that for most food businesses, the current definition and approach of the food safety regulations should not be regarded as a major issue. However, it should still be recognised that for 1 in 20 the regulatory environment is perceived consistently negatively.

Conclusions

Food safety regulations are seen as the most time/effort intensive area of government regulations with 63% of food businesses rating it as one of the top three most time/effort intensive and 32% rating it as the most time/intensive. In contrast, VAT returns was selected in the top three by 31% with environmental regulations at 28%.

The benefits are food safety standards to the business is generally acknowledged with 72% of respondents stating that they helped their business by building consumer confidence and 78% stated that they helped increase consumer confidence in food businesses in general.

However, less than half of business believe that the food safety are applied equally (48%) and 62% believe that they are applied consistently. The apparent contrast with the positive ratings with the inspector reflects the engagement with the inspector which is positive but also reflects the disconnect between understanding how to comply and understanding why regulations are in place.

Reflecting this, many businesses regard the food safety standards are stricter than they need to be (45% agree), and requiring too much time to comply with (34% agree) and too much investment (32% agree).

Most businesses do not believe that the standards hinder the growth of their business (15% believe that they do) and only a small minority of businesses (5%) see multiple issues with the current regulations without recognising the benefit for their business from regulation.

6. Awareness and use of FSAI services by SME food businesses

Web site

A majority of respondents were aware of the FSAI web-site (67%) with 43% stating that they had visited it at some point on the past (Figure 31). Awareness rates and visit rates are heavily dependent on the nature of information or transactions that the web-site supports. Comparing these figures with figures for other agency sites targeting food businesses, these scores are lower than expected. In part, this will reflect the focus of food businesses on inspection compliance and therefore it is less likely that managers will access the web-site unless there is a specific issue related to that inspection.

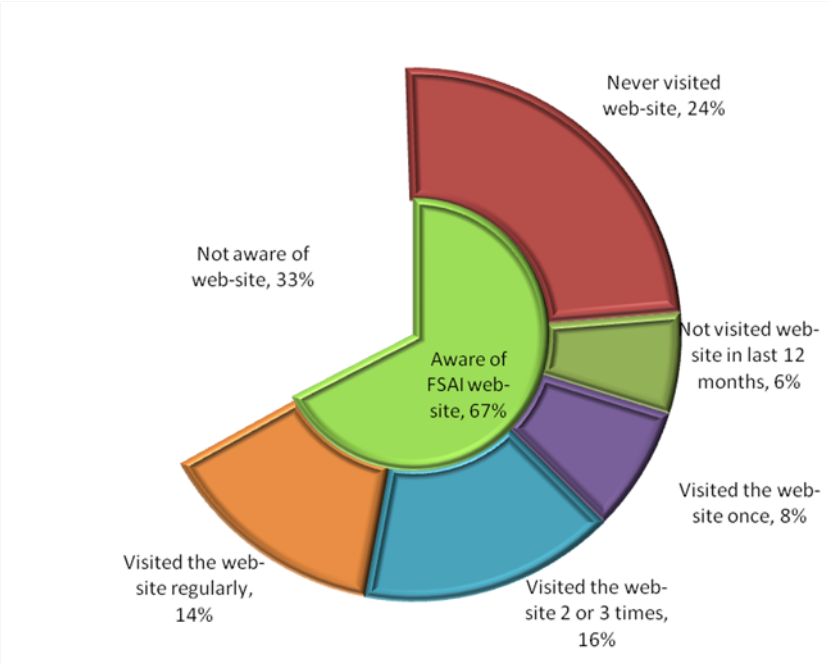

Figure 31: Awareness and use of FSAI web-site (n=959)

At a sub-sector level (Figure 32), food production businesses are most likely to be aware and to use the web-site and the scores for this sub-sector were similar to the levels of awareness and expected by the researchers. Food wholesale/distribution businesses also report high levels of awareness and use of the web-site. In conjunction with higher levels of appeals and concerns about appropriateness of the regulation, this may reflect heightened concerns about compliance. However, it should also be recognised that some of the differences between sub-sectors reflect different work environments.

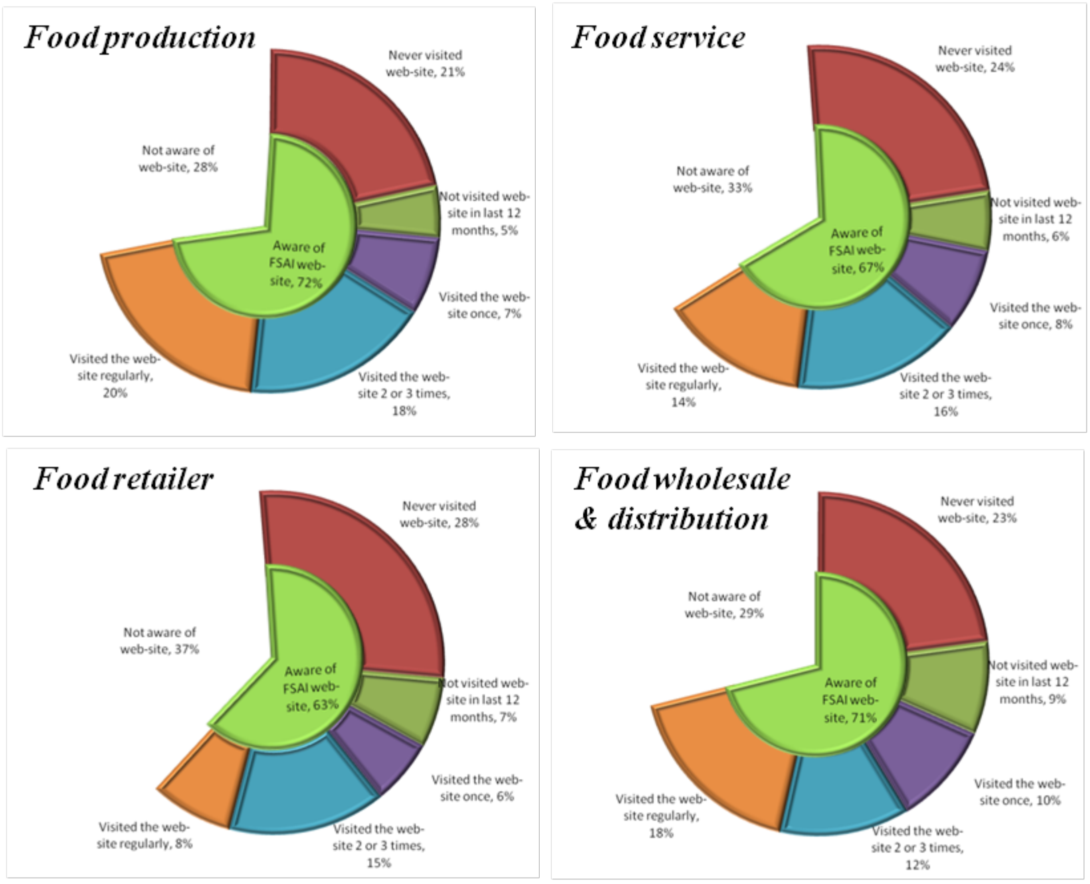

Figure 33: Awareness and use of FSAI web-site by sub-sector

Considering awareness of the content on the web-site, Figure 34 shows that there are similar levels of awareness of each category of information among food businesses aware of the web-site (i.e. 63% of all respondents to the survey).

Figure 34: Awareness of categories of information available on the web-site

Analysis of the number of categories of information respondents were aware of reveals a group of businesses (corresponding to 54% of those aware of the web-site) with a high level of knowledge of the information on the web-site reflected in their awareness of 6 or 7 of the categories of information available.

In contrast, 22% of food businesses aware of the web-site are aware of none of the categories of information available (Figure 35). This group includes a high proportion of the food businesses which are aware but have never visited the web-site.

This suggests that the web-site has been very effective in communicating to visitors the range of information available but communication to non-visotrs appears much less effective.

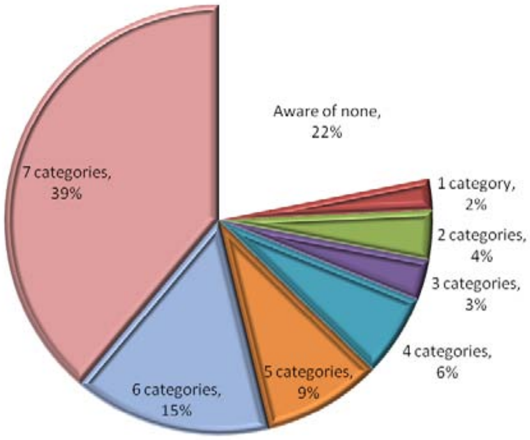

Figure 35: Number of the categories of content identified as available on the FSAI web-site

The most common activity completed while visiting the FSAI web-site was to retrieve information about legislation (Table 8). While the score for "how to start up a food business" is low across all sub-sectors, this is unsurprising given that this information is only appropriate to a start-up and therefore unlikely to be relevant to the majority of established businesses in any of the sub-sectors. Among web-site visitors, 96% stated that they found the information they had sought.

Activity while visiting the web-site	Overall (n=356)	production (n=74)	Food service (n=167)	Food retailer (n=70)	distribution (n=45)
Checked on food alerts (such as products recalls)	41 %	41 %	34 %	44 %	44 %
Retrieved information or downloaded a document about legislation related to food safety sell safe food and comply with the food law	81 %	81 %	77 %	67 %	71 %
Retrieved or downloaded a document technical information about how to produce	14 %	14 %	13 %	9 %	9 %
Retrieved or downloaded a document information on how to start up a food business	1 %	1 %	10 %	9 %	7 %

Table 8: Activity which best describes what respondent completed during last visit

Given the very high level of success in completing the initial task which motivated the web-site visit (96% stated they retrieved the required information), it is also unsurprising that almost all (92%) were satisfied with the information that was provided. This score is similar across sub-sectors and also for each type of information retrieved.

Advice line

The Food Safety Authority of Ireland provides an advice line which can be accessed by both consumers and food businesses. However, the awareness of the advice line is low among food businesses included within this research with 68% stating that they are ***not*** aware of the advice line. An additional 28% stated that they were aware but had not used the line. Only 4% stating that they had used the line. However the level of usage is not necessary negative as the web-site should be able to handle standard queries and leave the advice line only for less standard issues.

The reasons reported for using the advice line were very diverse with 15 different categories of reason identified. The most common reason was to get general information on regulations (cited as the reason for the contact by 27% of those who used the advice line) with labeling information as the second most common reason given (at 12%). Finally, the level of satisfaction with the information received by those who did use the advice line was good at 77% (Figure 36).

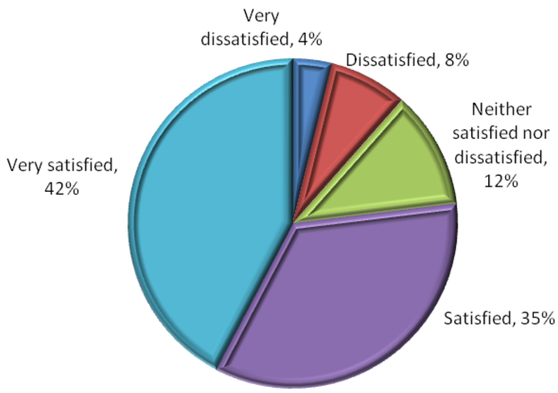

Figure 36: Level of satisfaction with the information received from the advice line (n=38)

The food businesses which use the advice line are also more aware of the web-site (88% of advice line users were also aware of the web-site compared to 67% in the total population of food businesses). This may reflect a greater level of awareness and engagement with FSAI generally.

Furthermore, 28% of food businesses surveyed were aware of neither the web-site nor the advice line (Figure 37). This is similar across the sub-sectors with food retailers slightly more likely to be unaware of both web-site and advice line (at 32%). Therefore, there is an opportunity to increase awareness among a significant minority of food businesses of the availability of information in FSAI.

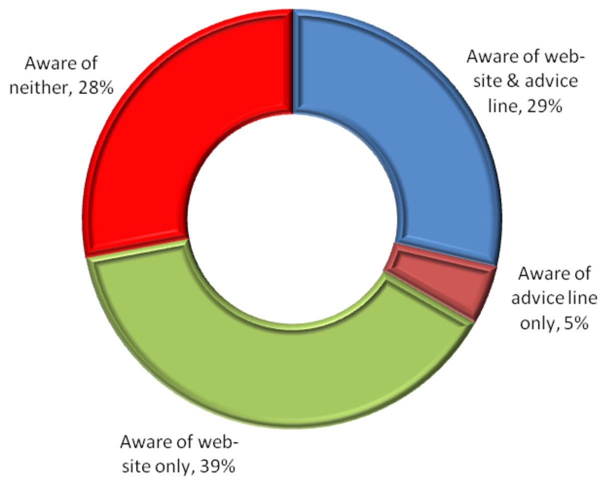

Figure 37: Awareness of the combination of the web-site and advice line

Web based communications

Web2.0 tools such as social networking (Facebook and LinkedIn), twitter and sites which facilitate sharing of video or presentations potentially provide a promising avenue for enhancing communication between FSAI and the food industry. Participants in the research were asked to rate the potential effectiveness of each of four categories of Web2.0 tools if used by FSAI to communicate with their business. Figure 38 summarises these responses and shows a high degree of polarization with a significant proportion of businesses either deeming these as effective or not effective. Of the four categories rated, Social Networking and slide sharing sites score highest in terms of effectiveness but there are still significant minorities also rating these as not effective. In contrast twitter has lowest effective rating and has the highest *not effective* rating.

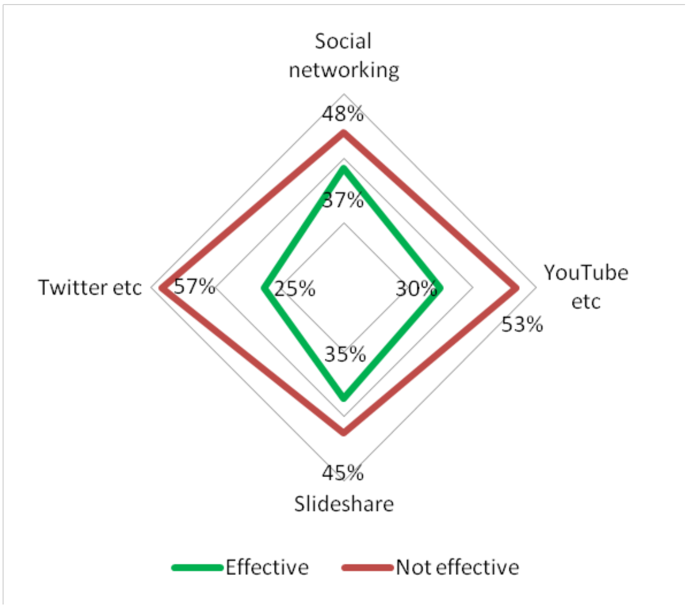

Figure 38: Rating of the effectiveness of Web2.0 communications tools that The Food Safety of Ireland could use to better inform and communicate with food businesses about food safety issues (n=500)

At a sub-sector level (Figure 39), retailers are most negative about the use of these tools in general and food producers most positive about the use of social networking and slide sharing sites in particular. In part this reflects the different nature of these businesses: Food producers are often already using these sites to promote their own products. In contrast food retailers may have limited access to the internet from their place of business – where the computer will often be in the office and not immediately accessible in the shop area.

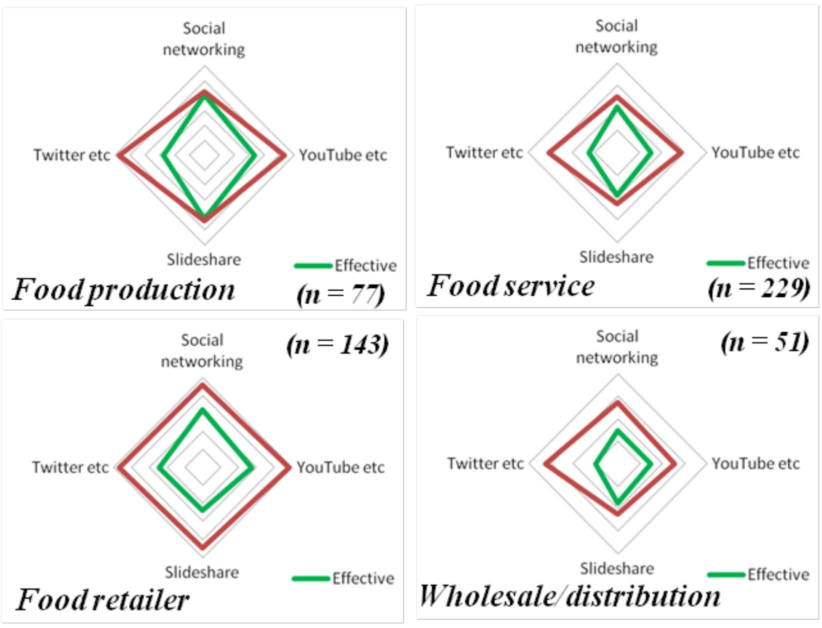

Figure 39: Rating of the effectiveness of Web2.0 communication tools by sub-sector

Therefore, it is clear that Web2.0 facilities do not yet represent replacement modes of communication which are acceptable to all of food businesses as a significant proportion of respondents did not find any of the tested options acceptable. However, it is also clear that a significant minority of food businesses is open to their use in the context presented. This polarisation with regard to these technologies is typical of the polarisation in attitudes that often emerges with new technologies during the early stages of adoption. Therefore, use of Web2.0 facilities should be considered as a ***complementary*** channel which can used at the discretion of the business.

On the more general issue of what FSAI should focus on in terms of improving the information they provide, research participants were asked to rate as useful or not four areas of potential focus. Figure 40 summarises the responses and shows general support for each of the focus areas.

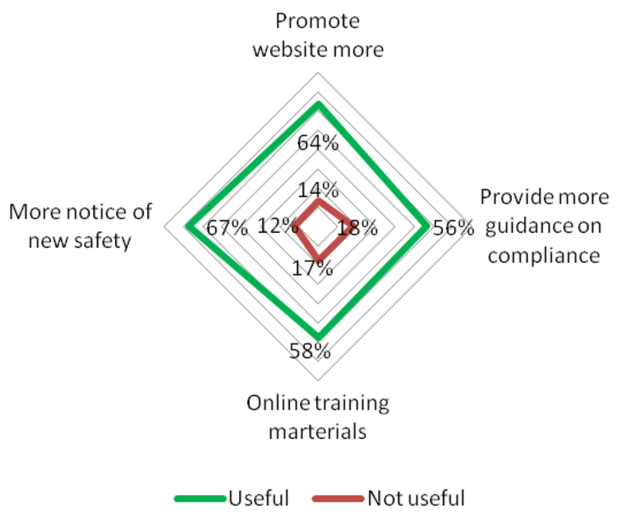

Figure 40: Rating of areas where FSAI could focus improvement in the information provided to food businesses (n=523)

Conclusions

A majority of businesses aware of FSAI are aware of its web-site (67%) with 38% stating that they have visited the web-site within the last year and 14% regularly using it. Most food businesses which have not visited the web-site are either not aware of the web-site at all or not aware of the type of information available on the site. The lack of translation of the reasonable level of awareness into actual visits and the lack of awareness of the information available suggests that there is an opportunity to increase awareness of the value of the site among the wider population of food businesses.

Awareness of the advice line was low among the SME businesses responding to the survey (32% aware). This low awareness translates into a low usage rate of 4% with 2.8% using the line within the last 12 months. While this is a low usage level, most users (77%) of the advice line were in fact satisfied. Furthermore, low usage is not necessarily a problem as food businesses believe that they can get the required information and some may be using the web-site instead. However, 28% of food businesses were aware of neither the advice line nor the web-site and this group may not be getting access to the information they actually require.

With regard to the opportunity for FSAI to use Web2.0 technologies to communicate with food businesses, it is clear that Web2.0 facilities will not provide an alternative mode of communication which is acceptable to all of food businesses as a significant proportion of respondents did not find any of the tested options acceptable (the options tested were social networks such as Facebook and LinkedIn, twitter and web sites allowing presentation slide sets or videos to be shared). Therefore, use of Web2.0 facilities should be considered as a complementary channel which can used at the discretion of the business.

Finally, all types of additional communication (such as more notice of new regulations, more guidance on compliance, more online training materials and more promotion of the web-site) were supported as useful additions by the majority of businesses in each sub-sector as well as overall.

7. Appendix 1: Profile of participants

Basis for inclusion in the survey

Small to medium food businesses were selected at random from validated lists of food businesses with up to 50 employees distributed across the Republic of Ireland. These lists included the full range of business categories including specialist types such as market stalls in farmers' markets and mobile catering businesses such as chip vans and event caterers.

Each business was contacted using the telephone by the fieldwork call centre. The interviewer requested contact with the person who was responsible (or jointly responsible) for food safety and compliance with food safety legislation. This ensured that the survey captured the informed attitudes within each business to food regulation and related issues. In most cases, the respondent was the owner or overall manager (Figure 41) with small proportions of respondents describing their role within the business as operations managers (4%), food quality or quality manager (2%) or chef (4%).

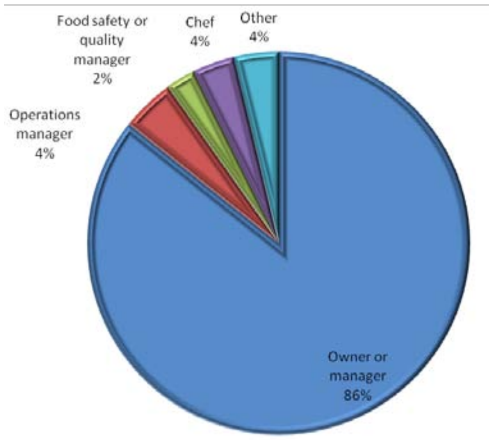

Figure 41: Role of respondent within the business

Profile of participants

The objective of the research was to achieve sufficient representation of the diversity of the food industry at both sector (i.e. food service) and sub-sector level (i.e. mobile catering). Figure 42 and Figure 43 demonstrate the achievement of this representivity.

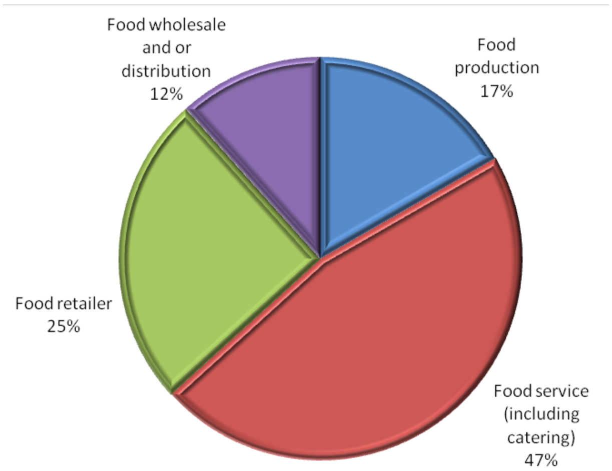

Figure 42: Distribution of respondents by sector

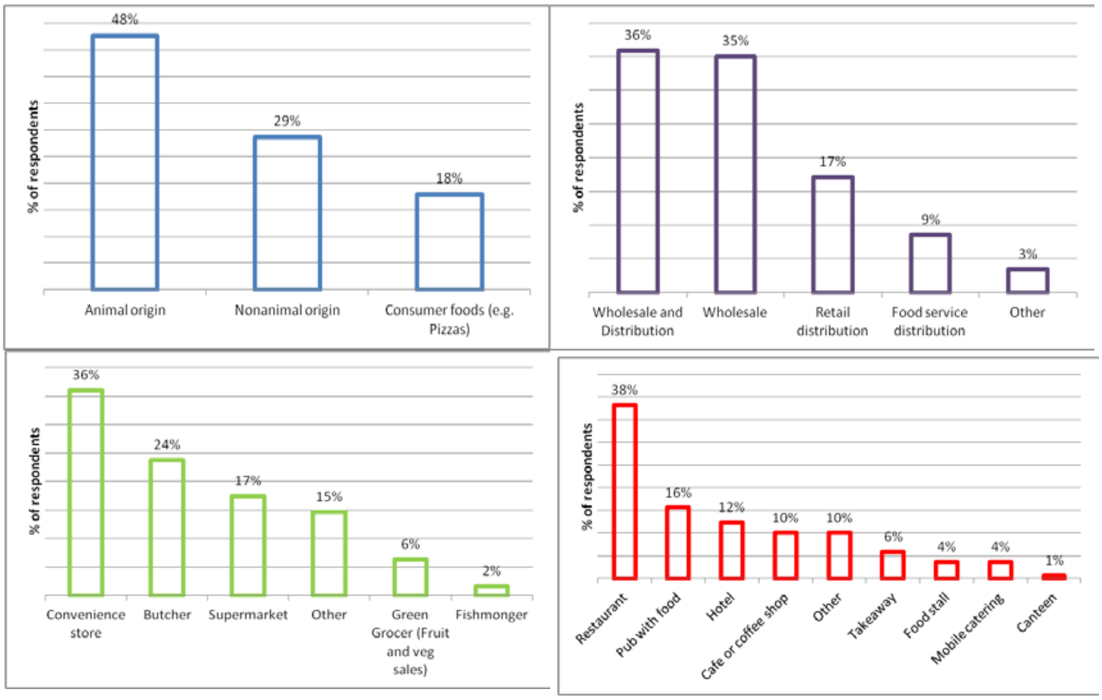

Figure 43: Distribution of respondents within each category and sub-sector

The research focused on small to medium businesses, defined within the context of this research to mean businesses with less than 50 employees.

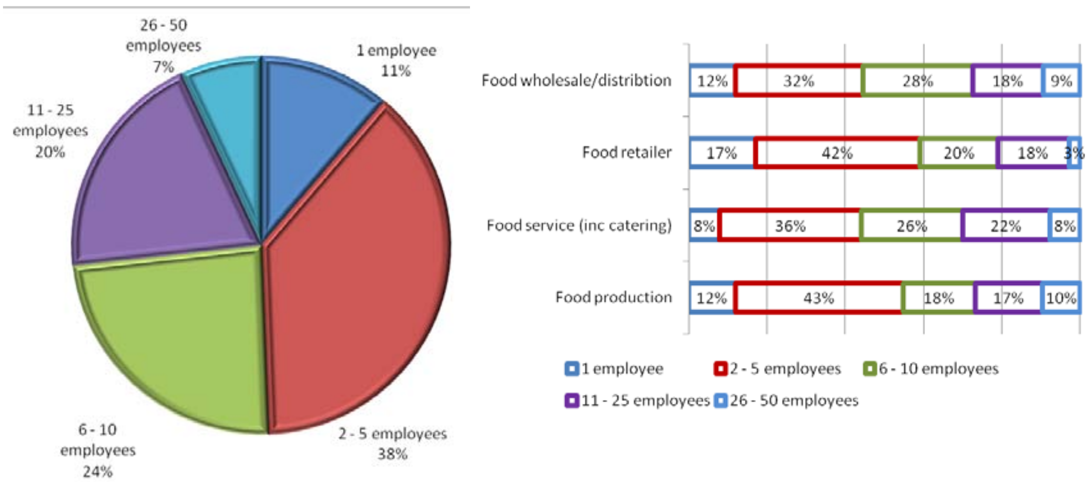

Figure 44: Distribution of respondents by number of employees

The profile of respondents by number of employees is shown in Figure 44 at both sector and sub-sector level. As expected the majority of respondents are in businesses with less than 10 employees (73%). This reflects the dominance of small businesses within the industry. The distribution is similar across the sub-sectors.

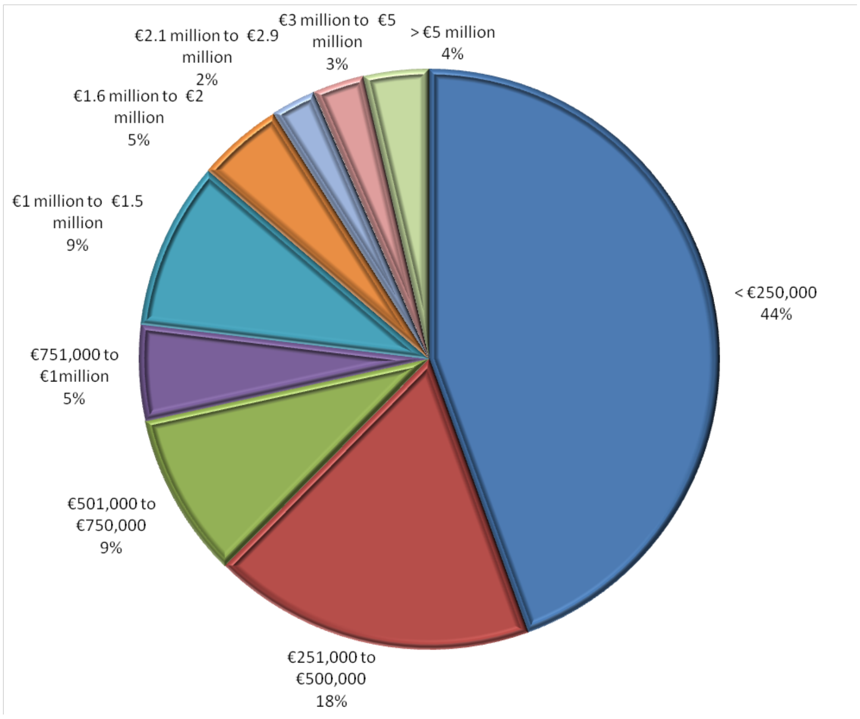

Figure 45: Distribution of respondents by value of annual sales (n=524)

The profile of the value of annual sales is also in line with the distribution of business size with a majority of business (62%) reporting annual sales less than €500,000 (Figure 45).

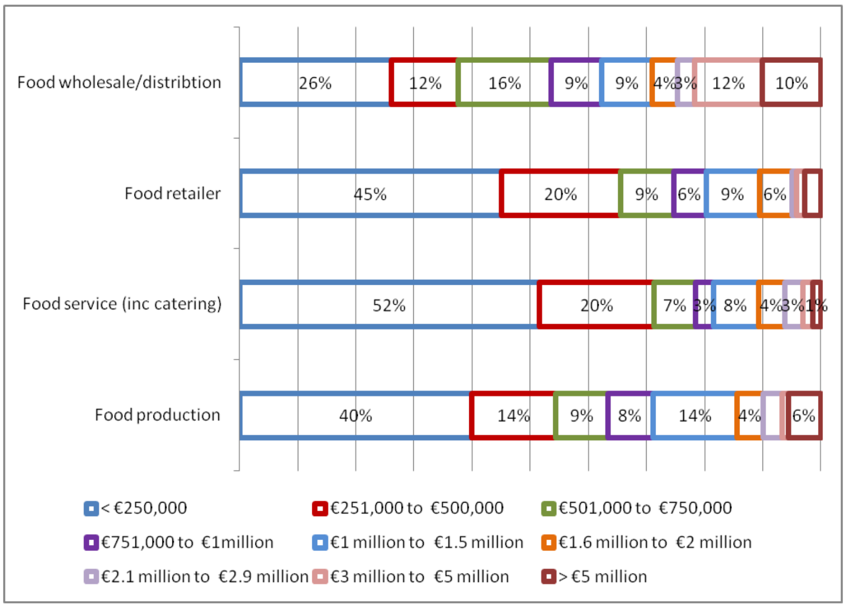

Figure 46: Distribution of respondents by value of annual sales by subsector

Examining the reported value of annual sales at a sub-sector level (Figure 46) shows that food service businesses have the lowest average value of annual sales (72% reported annual sales of less than €500,000). The sub-sectors with the highest reported value of annual sales are food production with 29% reporting the value of annual sales as greater than €1million and food wholesale/distribution with 10% reporting the value of annual sales as greater than €5m. It should be noted that the sample is representative only of business with less than 50 employees and therefore excludes the large retailers and food production businesses based in Ireland which would have commensurately greater annual sales value.

It should also be noted that 524 respondents provided annual sales information with the remainder declining to answer that question. This lower level of response to potentially sensitive financial information was expected and in line with other SME research projects undertaken by the researchers. It was confirmed that no bias was introduced into the responses to this question through an analysis of the profile of respondents and non-respondents.

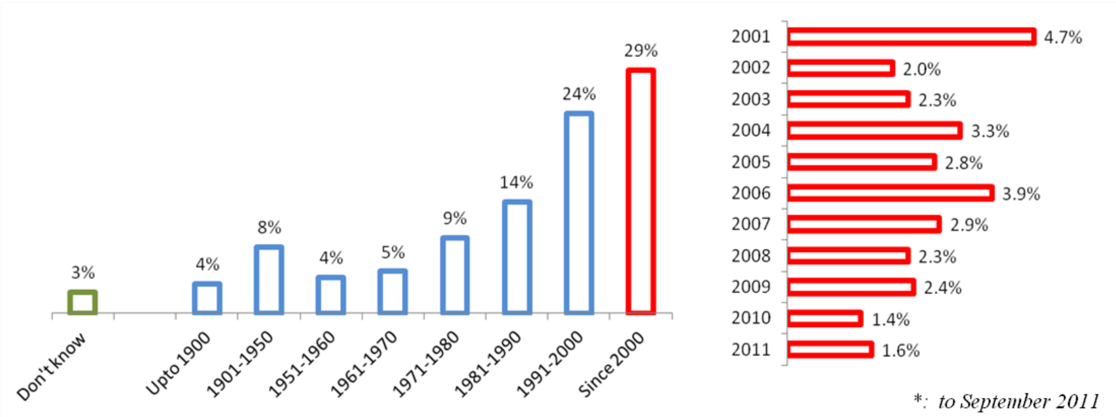

Figure 47: Distribution of the date of business establishment among respondents

Businesses were asked when they had been established. Figure 47 summarises that distribution with the year of establishment broken down into individual years on the right of the figure for the years 2000 to date. It can be seen that the survey included the full spectrum of businesses by age including 12% which had been established before 1950.

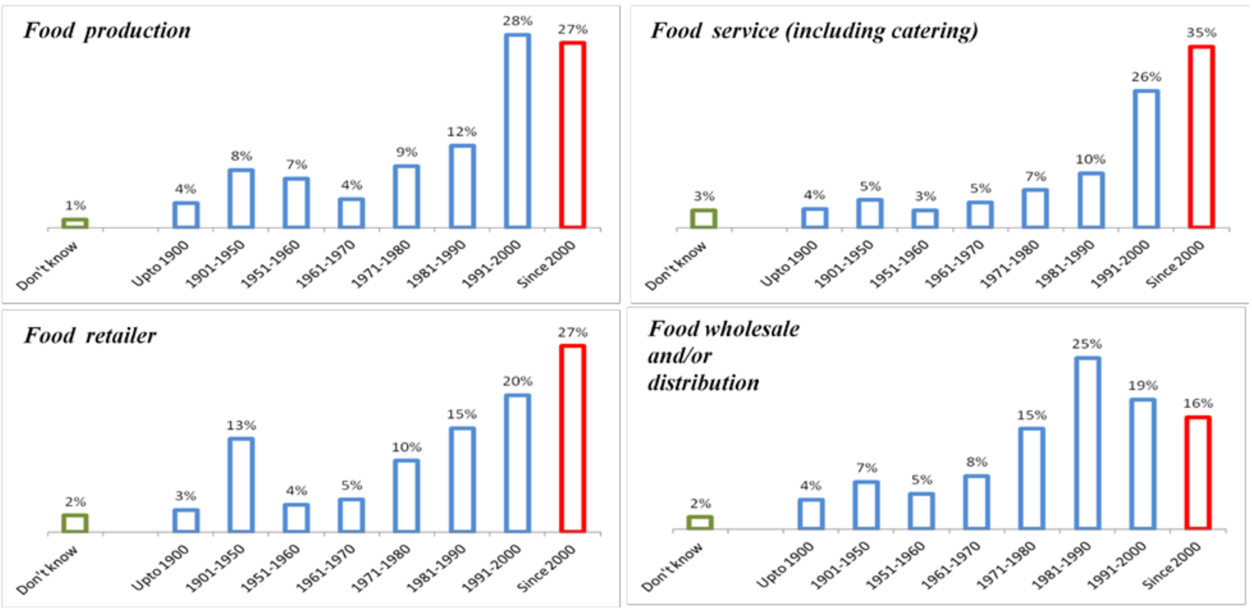

Figure 48: Distribution of the date of establishment by subsector

As with other aspects of the survey, there were differences between the sub-sectors with respect of the date of establishment (shown in Figure 48). For example, approximately one third of food service businesses stated that they had been established since 2000 with 61% established since 1991. In contrast, 16% of food wholesale and distribution businesses stated that they were established since 2000 with 35% established since 1991.

8. Appendix 2: The survey

INTRODUCTION AND PROFILE QUESTIONS

INTRODUCTORY TEXT

Good Morning \ Afternoon \ Evening. I'm _________ calling from Millward Brown. We're conducting a survey on behalf of The Food Safety Authority of Ireland in connection with your views and experience of food safety regulations in Ireland. Everything you say to me will be treated in strict confidence and will be used for statistical purposes only. The survey will take approximately **[INSERT FINAL TIMING]** minutes. Is this a convenient time for you? If not, can you suggest a time for me to call you back?

[NOTE: PARTICIPANTS WILL BE GIVEN AN OPPORTUNITY TO REFUSE TO PARTICIPATE]

Q100

Are you the person in your business who is responsible or jointly responsible for food safety and compliance with food safety legislation – and are you in a position to answer questions on this topic?

1. Yes
2. No – ***[ASK TO SPEAK TO PERSON (JOINTLY) RESPONSIBLE FOR FOOD SAFETY]***

Q110

And may I ask your name? – I need your name for quality assurance purposes and as I said a moment ago, your responses are confidential.

[IF REQUIRED PARTICIPANTS SHOULD BE REASSURED ABOUT ANONYMITY. RECORDING THE NAME IS IMPORTANT TO ALLOW TRACKING OF ANY ISSUES THAT MAY BE RAISED LATER]

Q120

Which of the following best describes your primary role within the business?

3. Owner/manager
4. Operations manager
5. Food safety or quality manager
6. Other ________ ***[CAPTURE RESPONSE]***

Q125

Which of the following best describes the main aspects of yourfood business?

1. Food production
2. Food service(including catering)
3. Food retailer
4. Food wholesale and/or distribution

[SET BUSINESS_TYPE FROM RESPONSE TO Q125]

Q130

[IF BUSINESS_TYPE =1]

How many employees are engaged in any aspect of your business relating to food production (including yourself)?

[IF BUSINESS_TYPE =2]

How many employees are engaged in any aspects of your business relating to food preparation or serving (including yourself)?

[IF BUSINESS_TYPE =3]

How many employees are engaged in any aspects of your business relating to food preparation, serving (including yourself)?

[IF BUSINESS_TYPE =4]

How many employees are engaged in any aspects of your business relating to food wholesale or distribution (including yourself)?

1	1 employee
3	2 - 5 employees
4	6 - 10 employees
5	11 - 25 employees
6	26 - 50 employees
7	More than 50 employees

[IF Q130=7 THEN TERMINATE WITH Q50000]

Q140

Could you please briefly describe the main aspects of your business?

[INTERVIEWER: CODE ORGANISTATION'S BUSINESS AS APPROPRIATE TO THE FOLLOWING – PROMPT IF NECESSARY]

[IF BUSINESS_TYPE = 1]]

1. Production of food of animal origin (such as meat, dairy, eggs, fish, shellfish)
2. Production of food of non-animal origin (such as vegetables, confectionary, fruit)
3. Production of consumer foods (such as pizzas, ready meals and prepared sauces
4. Other____ [CAPTURE]

[IF BUSINESS_TYPE = 2]

1. Take-away
2. Restaurant (open to the public)

3. Cafe or coffee shop
4. Canteen (used by employees of an organisation)
5. Pub with food
6. Hotel
7. Mobile catering serving hot food (such as a chip van)
8. Mobile catering serving cold food (such as an ice cream van)
9. Food stall
10. Other____ [CAPTURE]

[IF BUSINESS_TYPE = 3]

1. Supermarket
2. Convenience store
3. Butcher
4. Fishmonger
5. Green Grocer (Fruit and veg sales)
6. Other ____ [CAPTURE]

[IF BUSINESS_TYPE = 4]

1. Wholesale
2. Retail Distribution
3. Food Service Distribution
4. Wholesale and distribution
5. Other ____ [CAPTURE]

Q150

When was your food business established?

[NOTE TO INTERVIEWER: IF QUERIED WE ARE INTERESTED IN WHEN THE FOOD BUSINESS WAS ESTABLISHED AND NOT ANY NON-FOOD ASPECTS OF THE BUSINESS THAT MAY HAVE PRE-EXISTED]

Q190

May I ask you which of the following categories your annual turnover during the last financial year falls into (I am only interested in the food related aspects of your business)? I should reiterate that this information will be kept entirely confidential and it will only be used to categorise the survey responses by size of business.

1. < 250,000 Euro
2. 251,000 Euro - 500,000 Euro
3. 501,000 Euro - 750,000 Euro
4. 751,000 Euro - 1million Euro
5. 1 million Euro - 1.5 million Euro
6. 1.6 million Euro - 2 million Euro
7. 3 million Euro - 5 million Euro
8. over 5 million euro
9. Refused

Q300

Thinking about the government regulations that your business must comply with, please rank the top three which require the greatest amount of time and effort:

1. Compliance with environmental regulations such as those related to waste disposal
2. Compliance with Food safety regulation
3. Making PAYE and PRSI returns
4. Making VAT returns
5. Compliance with Health and safety regulations
6. Compliance with Employment laws
7. Compliance with local authority planning requirements
8. Other – please specify ____________________[CAPTURE]

Q400 **MULTIPLE (RANDOMISE ORDER)**

Thinking about the organisations that are your sources of information about food safety, please select the following sources that you have used in the last twelve months:

1. Safefood
2. A food safety consultant
3. Teagasc
4. Health Service Executive (HSE)
5. Department of Agriculture, Fisheries and Food
6. Sea-Fisheries Protection Authority (SFPA)
7. Local Authority
8. Local enterprise board/Leader programme
9. Enterprise Ireland
10. Bord Bia
11. Food Safety Authority of Ireland (FSAI)
12. Other _____ [SPECIFY]

Q500

Is your business registered or approved by the food authorities?

1. Yes
2. No

[IF Q500=1]

Q502

Which government agency is your business registered with or approved by?

CODE TO:

1. HSE
2. Department of Agriculture, Fisheries and Food (DAFF)
3. Local Authority/council
4. Sea Fisheries Protection Authority
5. Other _____ [CAPTURE]

[IF Q150 SINCE 2006]

Q510

[DETERMINE IF THE RESPONDENT WAS INVOLVED IN THE ORIGINAL FOOD SAFETY INSPECTION AND HENCE CAN COMMENT ON THE EXPERIENCE]

And were you involved in the original food safety inspection when business was set up??

1. Yes
2. No

[IF Q150 ON/BEFORE 2006 OR Q510=2]

Q520

And were you involved in the most recent food safety inspections of your business?

1. Yes
2. No – We have not been inspected
3. No – I was not involved

EXPERIENCE OF FIRST FOOD INSPECTION AND SET-UP

[IF (Q510 =2) OR (Q150 ON/BEFORE 2006) GOTO Q2000]

I would now like to discuss your experience of setting up a food business and of that first food safety inspection.

Q1000

Recalling when you first set-up the food aspects of the business, which of the following describe how you found out that you needed to register and be approved?

1. I knew from previous experience of setting up a food business
2. I was informed by a food inspector who visited the premises

3. From information provided by The Food Safety Authority of Ireland
4. From government agencies (such as the local enterprise board, Enterprise Ireland, Teagasc or Bord Bia)
5. From trade organisations (such as Retail Ireland, IBEC, ISME or Irish Craft Butchers Association)
6. From other food business owners or managers

Q1010

Thinking about when your business was set-up, please rate each of the following food safety challenges on a scale of 1 to 5 where 5 is a significant challenge and 1 is not at all a challenge

1. Developing and documenting your food safety management system (HACCP system)
2. Identifying and accessing appropriate training for you and your staff
3. Compliance with structural requirements (such as changes to the building or equipment)
4. Dealing with the authorities responsible for food safety
5. The time required to comply with the food safety requirements
6. The cost of compliance with the food safety requirements

Q1020

Thinking about when your business was first inspected, please rate on a scale of 1 to 5 where 5 is strongly agree and 1 is strongly disagree whether you agree with the following statements. As I mentioned at the start of the survey, all of your responses will be entirely confidential and there is no way your response will be identified with your business:

1. The inspector dealt with my business in a supportive way
2. The inspector was knowledgeable about aspects of food safety related to my business
3. The inspector was easy to work with
4. The inspector gave me enough time to comply with his/her requirements
5. We found the food regulations difficult to understand
6. We had difficulty complying with some aspects of the regulations

[IF Q1020.3 <3 (i.e. not easy to work with)]

Q1030

Why do you say that the inspector was not easy to work with?

[IF Q1020.1 >3 (i.e. supportive)]])]

Q1040

In what ways was the inspector supportive?

Q1050

What government agency did the food safety inspector work for?

[INTERVIEWER CODE TO:]

1. Health Service Executive (HSE) (Environmental Health Officer)
2. Department of Agriculture, Fisheries and Food (dairy inspector, egg inspector, Vet)
3. Local authority/County council (Vet)
4. Sea-Fisheries Protection Authority (sea fisheries officer)
5. Other______ [CAPTURE]
6. Don't know

Q1060

Thinking about when your business was set-up, please rate on a scale of 1 to 5 where 5 is strongly agree and 1 is strongly disagree whether you agree with the following statements:

1. I understood what I needed to do to comply with food regulations
2. The food safety regulations would dissuade me from setting up another food business in future
3. I was able to access enough information to allow me to comply with food safety regulations

GOTO QUESTION 3000

EXPERIENCE OF MOST RECENT FOOD INSPECTION

[IF (Q520 = 2 OR 3) GOTO Q3000]

Q2000

When was your business' most recent inspection by a food safety inspector?

1. Within the last month
2. Within the last six months
3. Within the last year
4. Within the last two years
5. More than two years ago

Q2010

What government agency did the food safety inspector work for?
[INTERVIEWER CODE TO:]

1. Health Service Executive (HSE) (environmental Health officer)
2. Department of Agriculture, Fisheries and Food (dairy inspector, egg inspector, Vet)
3. Local authority/County council(vet)
4. Sea-Fisheries Protection Authority (sea fisheries officer)
5. Other______ [CAPTURE]
6. Don’t know

Q2020

Thinking about when your business’ most recent inspection, please rate on a scale of 1 to 5 where 5 is strongly agree and 1 is strongly disagree whether you agree with the following statements:

1. The inspector dealt with my business in a supportive way
2. The inspector was knowledgeable about aspects of food safety related to my business
3. The inspector was easy to work with
4. There were new requirements in the food safety regulations which impacted my business
5. We found the food regulations difficult to comply with
6. I understood why the recommendations were necessary
7. Inspectors have been consistent in what they require me to do to comply with the law

[IF Q2020.3 <3 (i.e. not easy to work with)]

Q2030

Why do you say that the inspector was not easy to work with?

[IF Q2020.1 >3 (i.e. supportive)]

Q2035

In what ways was the inspector supportive?

[IF Q2020.5 >3 (i.e. some aspects difficult to comply with)]

Q2040

You said that you had difficulty complying with some aspects of the regulation. Which of the following best captures where you had difficulties?

1. Understanding how to make the necessary changes
2. Funding the cost of making the necessary changes
3. Finding the time to make the necessary changes
4. Balancing changes to product quality with changes required for compliance with the food regulations

[IF Q2020.5 >3 (i.e. some aspects difficult to comply with)]

Q2050

Apart from [INSERT ANSWER FROM Q2040], where there any other areas where you had difficulty complying with?

[LIST FROM Q2040 WITH THE SELECTED ITEM LEFT OUT]

Q2060

If there was one improvement to the inspection process you would suggest, what would it be?

AWARENESS OF APPEALS PROCESS

Q3000

Are you aware that you can query or appeal the decisions of the inspector?

1. Yes
2. No

[IF Q3000=1]

Q3010

Who do you think that you can you appeal to?

[INTERVIEW CAPTURE VERBATIM AND CODE:]

1. The inspector him or herself
2. The inspectors' supervisor
3. The inspectors' organisation (such as the HSE or Department of Agriculture)
4. FSAI
5. The courts
6. Local representatives such as a T.D.

[IF Q3000=1]

Q3020

At any time in the past, did you believe that you have had grounds to query or appeal decisions of a food safety inspector?

1. Yes
2. No

[IF Q3020=1]

Q3030

And did you appeal?

1. Yes
2. No

[IF Q3030=1]

Q3050

How satisfied were you with the way your query/appeal was handled?

1. Very dissatisfied
2. Dissatisfied
3. Neither satisfied nor dissatisfied
4. Satisfied
5. Very satisfied

EXPERIENCE OF RUNNING A FOOD BUSINESS IN IRELAND

I would now like to ask you questions about the food safety regulations in general.

Q5010

Can you name the government body or bodies responsible for ensuring that all food produced and sold in Ireland complies with the food safety and hygiene standards and laws?

[INTERVIEWER CODE TO:]

1. Food Safety Authority of Ireland (FSAI)
2. Health Service Executive (HSE)
3. Department of Agriculture
4. County council
5. Bord Bia
6. Sea Food Protection Authority (SFPA)
7. SafeFood (Food safety Promotion Board)
8. Other___ [CAPTURE]

Q5020

Before receiving this call were you aware of The Food Safety Authority of Ireland?

1. Yes
2. No

[IF Q5020 >1]

The Food Safety Authority of Ireland is the government agency with these responsibilities.

Q5040

For each of the following statements, please state on a scale of 1 to 5 whether you agree or disagree where 5 is strongly agree and 1 is strongly disagree

1. I trust FSAI to deal with food businesses fairly
2. The food safety standards help my business by increasing consumer confidence in my products
3. The food safety standards increase confidence of consumers in Irish food businesses in general
4. The food safety standards are stricter than they need to be to ensure food safety in my business
5. The food safety standards are applied equally to all food businesses
6. The food safety standards require too much time to comply with for businesses like mine
7. The food safety standards require too much investment to comply with for businesses like mine
8. The food safety standards are hindering the growth of my business
9. The food safety standard are applied consistently

AWARENESS AND ASSESSMENT OF INFORMATION AND SUPPORTS

[IF Q5020=1]

The Food Safety Authority provides a number of different information resources; I would now like to ask about your awareness of these, if you have used them and how you would assess their usefulness.

Q5090

Please state on a scale of 1 to 5 whether you agree or disagree with the following statement where 5 is strongly agree and 1 is strongly disagree

1. In general, I find it easy to access food safety information relevant to my business.

[IF Q5020=1]

Q6000

Are you aware that the Food Safety Authority of Ireland has a web-site which contains information for food businesses?

1. Yes
2. No

[IF Q6000=1]

Q6010

How often have you visited the web-site in the last 12 months?

1. Never visited the web-site
2. Have not visited the web-site in the last 12 months
3. Visited the web-site once (in the last 12 months)
4. Visited the web-site 2 or 3 times
5. Visited the web-site regularly

[IF Q6010 >2]

Q6020

Which of the following best describes what you did when you visited the web-site?

1. Checked on food alerts (such as products recalls)
2. Retrieved information or downloaded a document about legislation related to food safety
3. Retrieved technical information or downloaded a document about how to produce/sell safe food and comply with the food law
4. Retrieved information or downloaded a document on how to start up a food business

[IF Q6010 >2]

Q6030

How satisfied were you with the information you found on the web-site?

1. Very dissatisfied
2. Dissatisfied
3. Neither satisfied nor dissatisfied
4. Satisfied
5. Very satisfied

[IF Q6010 >2]

Q6050

The last time that you visited the web-site, did you find the information that you required?

1. Yes
2. No

[IF Q6000 =1]

Q6060

Are you aware that the web-site includes (please state yes or no in each case)

1. Electronic Copies of all the legislation relating to food safety
2. Information on food labelling, health and nutrition claims
3. Information and updates on food alerts
4. A section of the web-site for food businesses
5. Many guidance notes detailing how to comply with different parts of the food law
6. Information on HACCP and setting up food safety management systems
7. Information on how businesses can meet their food safety training needs

Q6100

Are you aware that the Food Safety Authority of Ireland has an advice line number 1890 33 66 77 which can be used by food businesses as well as consumers?

1. Yes
2. No

[IF Q6100=1]

Q6105

Have you ever contacted FSAI using the advice line?

1. Yes
2. No

[IF Q6105=1]

Q6110

How often have you used the advice line in the last 12 months??

1. Never used the advice line in the last 12 months
2. Used the advice line once (in the last 12 months)
3. Used the advice line 2 or 3 times (in the last 12 months)
4. Used the advice line 4 or more times (in the last 12 months)

[IF Q6110>1]

Q6115

What information did you contact the advice line for?

[IF Q6110>2]

Q6120

How satisfied were you with the information you received from the advice line (thinking about whether it met your requirement)?

1. Very dissatisfied
2. Dissatisfied
3. Neither satisfied nor dissatisfied
4. Satisfied
5. Very satisfied

Q6200

Thinking about different methods that The Food Safety of Ireland could use to better inform and communicate with food businesses about food safety issues, please rate each of the following on a scale of 1 to 5 where 5 is very effective method for communicating with your business and 1 is not at all an effective method for communicating with your business:

1. Social networking sites such as Facebook, Foursquare or LinkedIn
2. YouTube and other sites which allow videos to be posted online
3. Slideshare and other sites which allow PowerPoint slides to be shared online
4. Twitter which allows updates and announcements to be shared

ADVICE AND SUGGESTIONS FOR IMPROVEMENT

Q10000

Thinking about how the Food Safety Authority in Ireland could improve the information that they provide, please rate each of the following on a scale of 1 to 5 where 5 is very useful and 1 is not at all useful:

1. Promote their website more
2. Provide more guidance on how to comply with the food safety regulations
3. Provide more online training materials
4. Provide more notice when new food safety requirements are introduced

COMPLETION – END OF INTERVIEW

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