



The 2008 Independent Retail and Speciality Food Market Census

Full Report prepared for the Guild of Fine Food

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A. Background and Objectives

The Guild of Fine Food (GFF) commissioned Compass Research to conduct an independent and comprehensive survey of the Fine Food retail sector across the UK, with the aim of establishing an authoritative source of reference.

The focus of reporting the key findings for the 2008 Census have shifted dramatically in the last few months in view of the critical financial and economic events leading to recession. The original aims have changed e.g. It is now less relevant to make comparisons with the past survey 4 years ago.

Therefore, the two main aims for this executive summary are to show:

- Clear pointers for Delis' survival in current times of recession
- Major areas of concern for Deli owners

The other objectives are included in the remainder of this full report, with sections as follows:

- Provide a review of the fine food retail sector, especially in the current economic uncertainty with a comparison to benchmark some key and common questions from the last survey in 2004 (although this only applies to a minority of questions)
- Contrast the 3 main retail types for each question (Delis, Farm Shops and Food Halls)

B. Survey Methodology

A sample total of 177 returns were received from nearly 2500 questionnaires sent out by the GFF in early July - the cut off for returns being the first week of August. Response was close to 10% as we took out some producers and online only people, and therefore can gross up % if we reduce the GFF original circulation list which included these

Two survey techniques were applied:

1. A detailed 4 page self-completion questionnaire was distributed to nearly 2500 retailers by the GFF as an insert to the Fine Food Digest Magazine, with a Business Reply envelope to the survey managers Compass Research.
2. An independent on-line link (with submissions returned directly to Compass) was provided by the GFF within the Guild-e newsletter, plus regular email reminders.

All replies being returned to an independent address at Compass Research, the response data being managed and processed under the MRS (Market Research Society) code of conduct. Data was processed and analysed using Snap Professional survey software, to generate a robust database to enable further analysis as required.

An Independent Prize Draw was offered by Compass as a response incentive (The winner receiving 2 tickets for the Great Taste Awards held on Sept 8th 2008)