FOOT AND MOUTH DISEASE:
BUSINESS IMPACT TRACKING SURVEY SCOTLAND (SEPTEMBER 2001)

Third Wave

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On behalf of the Impact Assessment Group we would also like to thank all those businesses who agreed to take part in this work, particularly those involved in all three waves.

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EXECUTIVE SUMMARY

1 In April 2001, a survey was commissioned by the FMD Economic Impact Assessment Group (IAG)[1] to assess the impact of foot and mouth disease across Scotland on non-agricultural businesses. The first phase of research excluded Dumfries and Galloway as this area had already been studied. A second wave of tracking research, commissioned by the IAG in June 2001, then monitored the continuing impact of FMD on non-agricultural businesses throughout Scotland, this time including Dumfries and Galloway. A third wave of tracking research was commissioned by the IAG in September (again including Dumfries and Galloway).

2 This stage of tracking research was conducted by means of 2452 telephone interviews amongst a quota sample of businesses (excluding agriculture). A bulk of interviews (1836) were conducted amongst businesses that had participated in the June study and agreed to be re-contacted and the remaining 616 were undertaken amongst a "top-up" sample of businesses[2]. All interviews were conducted between 2nd and 21st of October and the data was weighted to make sure that the achieved sample matched the profile of businesses within each LEC area and the weighted sample profile from the initial study undertaken in April.[3]

3 **A majority of businesses (66%) have felt no impact from FMD.** By September, around one in four respondents (24%) felt FMD had had some negative impact on their business, 3% had experienced some positive effect and 8% had experienced mixed effects. The proportion of business adversely affected is lower in provisionally free areas (20% experiencing any negative impact up to September 2001, compared with 32% in at risk / infected areas[4]).

4 **The impact of FMD has varied by sector, and tourism businesses have been most widely affected** (remembering that agricultural businesses were excluded from this sample). By September 2001, 50% of tourism businesses recorded some negative impact from the epidemic, 4% some positive and 17% a mixed outcome. Tourism businesses cite greater average proportional sales losses since the 1st March (attributable to FMD) than businesses in any other sector (avg. loss 31%).

5 **A large majority of those unaffected in April still recorded no impact by September (89%)**. Just under one in ten (8%) later recorded negative effects, 1% observed positive impact and 3% recorded a mixture of both positive and negative influences on their business. Conversely, 19% of those adversely affected in April have subsequently seen some positive impact to help counteract those adverse effects. Amongst those observing a positive impact at the outset of the outbreak, by far the

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[1] Established by Ross Finnie, the Minister for Environment and Rural Development, to assess the impact of foot and mouth across sectors and areas
[2] Unweighted figures
[3] Again adjusted for inclusion of Dumfries and Galloway
[4] The last case of FMD in Scotland was on 30th May 2001 and Scotland has been officially disease free since early September. Despite this improving disease situation, for reasons of consistency the definitions used for "at risk/infected" and "provisionally free" have remained the same in all three surveys and are shown on the appended map.

smallest proportion of businesses, around two in five (43%) have subsequently felt more mixed effects although a majority have only felt benefit.

6 In the September survey **only 3% of all businesses attributed any staff changes, compared to the same month in the previous year, directly to FMD.** This is somewhat lower than 5% of all businesses in both April and June. Inevitably there are variations by sector, and the tourism sector recorded the highest year on year changes attributable to FMD in April, June and September (13%, 16% and 7% respectively). A vast majority of businesses recorded no changes to either permanent or casual staffing levels that could be attributed to FMD.

7 The proportion of **businesses recording year on year sales losses dues to FMD has fallen steadily from a level of 16% in April to 10% in June and 7% in September**. Even in at risk / infected areas, the proportion of businesses recording year on year losses due to FMD has decreased from 20% in April to 14% in June and only 11% in September. In all months 1% or less of businesses reported year on year sales gains due to FMD.

8 In line with June findings, **only 3% of businesses recorded an increase to their costs as a result of FMD in September** (compared with 9% in April). None had seen a decrease in costs.

9 The survey sought to identify any actions taken by businesses suffering a negative impact from FMD and the data shows that by September **the most widespread actions have been to cancel or postpone recruitment or capital investment, increase marketing activity and to reduce prices to attract business**. The proportion of those adversely affected who have taken each of these measures shows a significant increase between April and September, although the incidence amongst all businesses is still extremely small.

10 In conclusion, a large majority of businesses (66%) feel that their operations have been unaffected by FMD at any stage since the outbreak began. By September, there has been a slight decrease in both year on year staff changes and sales losses attributable to FMD amongst those affected. However, there have been increases in the proportions of affected businesses finding it necessary to increase marketing activity, cancel or postpone recruitment or capital investment or reduce prices. Overall the shift has been in a considerably more positive than negative direction although of those still affected, the tourism sector continues to feel by far the greatest impact.

CHAPTER 1 – INTRODUCTION

This chapter initially outlines the background to this research project and the research objectives. It provides an overview of the approach that was adopted in order to collect the research data and obtain the results detailed in the remainder of this report.

1.1 CONTEXT

The foot and mouth outbreak of 2001 began on 20th February, when the first case was reported in Essex. In Scotland, the first case was confirmed in Dumfries and Galloway on 1st March, 2001. The outbreak escalated, and by 31st May there had been 187 confirmed cases in Scotland (mostly in the Dumfries and Galloway area) although there has not been another case since that date. As the disease situation became clearer, access and movement restrictions were gradually lifted based upon risk assessment and Scotland was declared officially disease free in early September.

In March, Ross Finnie, the Minister for Environment and Rural Development established an Foot and Mouth Disease Impact Assessment Group - consisting of sectoral experts within the Executive, the Enterprise Networks, Employment Services, VisitScotland, local authorities, Scottish Agricultural College and members from the most affected area, Dumfries and Galloway, to assess the impact across sectors and areas. In order to assess the impact of foot and mouth, the Impact Assessment Group (IAG) took the decision to commission a survey to provide a statistical picture of the outbreak's impact. Given that a similar survey had already been performed in Dumfries and Galloway, the first survey in April 2001 excluded businesses in the area. The results of the survey were published on 29th June 2001 and can be found on the Scottish Executive website at the following address:

http://www.scotland.gov.uk/agri/footandmouth/pubs/impact_survey.pdf

The survey encompassed the full range of business activity within the Scottish Economy although focusing on certain key sectors (namely tourism) and excluding agriculture. The rationale for excluding agriculture was that data is already available from alternative sources, such as the Farm Accounts Survey, and the IAG was keen not to place additional burdens on the sector.

In June, a second wave of tracking research was commissioned by the IAG in order to monitor the ongoing impact throughout Scotland, this time including Dumfries and Galloway although still excluding agricultural businesses. The results of the survey were published on 24th August 2001 and can also be found on the Scottish Executive website at the following address:

http://www.scotland.gov.uk/agri/footandmouth/pubs/FMD_wave_2_report.pdf

To continue measuring the impact a third wave of tracking research was commissioned in September and continued to include businesses in the Dumfries and Galloway region. This document reports the findings of the September survey beginning with an assessment of the cumulative impact of FMD in the period up to September 2001 i.e. the incidence of businesses affected by FMD at any stage from the beginning of the outbreak up to the end of September. There is then a discussion in greater detail of the impact of FMD on only those businesses claiming a year on year impact in September 2001. Finally, a third section provides comparative data for the months of April, June and September by discussing year on year comparisons of sales, employment levels, measures taken and advice sought for each month taking account of seasonal variations.

The work of the Impact Assessment Group helped provide an evidence base to inform the relief and recover decisions of the Ministerial Committee for Rural Development FMD sub-group. As shown by the results of this report, a significant minority of businesses continue to feel the impact of the outbreak and the work of the Impact Assessment Group is ongoing. The surveys are just one mechanism used by the group to assess the impact of the disease and will be used in, amongst other things, the ex-post assessment of the outbreak planned for 2002.

CHAPTER 2 – THE SURVEY PRACTICALITIES

This chapter details the methodology by which research was undertaken, the sampling approach employed and the ways in which the data was analysed.

2.1 METHODOLOGY

In line with the approach adopted at the benchmark study, all interviews were conducted by telephone. Telephone interviews provided the most cost-effective means of accessing business opinion whilst affording control over survey timings and ensuring a quick turnaround of results. They also avoided any problems that might occur due to restricted access to some rural businesses due to the Foot and Mouth restrictions.

A bulk of interviews (1836) were conducted amongst businesses that had participated in the June study and agreed to be re-contacted, which was lower than the 92% who had originally agreed to be re-contacted but remains a good response rate for this type of survey. The remaining 616 interviews were undertaken amongst a "top-up" sample of businesses. This latter segment were selected according to LEC area, sector and size in order to ensure that the final sample profile met pre-determined quota controls that guaranteed a large enough sample to provide results by individual LEC, which would be capable of withstanding discrete analysis.

Given the need to produce survey results at an individual LEC level in Scotland, the sample was based on 100 interviews to be conducted in each of the 22 individual LEC areas. In the cases of Scottish Enterprise Glasgow and Scottish Enterprise Edinburgh and Lothian, the sample was boosted to 200 interviews in order better to reflect both the volume and diversity of businesses found within these individual areas. There was an additional boost of 116 interviews across the Scottish Enterprise area to increase the representation of tourism businesses.

Due to pressure on resources, George Street Research agreed with the Scottish Executive that a proportion of the telephone interviewing fieldwork would be sub-contracted to an external telephone fieldwork agency, Facts International.

All interviews were conducted between 2nd and 21st of October 2001.

It should be recognised that the fieldwork for the third survey followed the attacks on the USA on September 11th. During the questioning it was emphasised that the survey was only interested in FMD Impacts. A small number of respondents, particularly those involved in tourism, expressed a view that there was some difficulty in differentiating between the impacts of the two incidents on their businesses although most believed they could attribute and apportion cause and effect.

2.2 SAMPLE

The bulk of the sample was originally purchased from Dun and Bradstreet[5]. It was possible to specify eligible businesses by SIC code, which resulted in a sample that was representative of

[5] Dun & Bradstreet operate a directory of around 1.5 million UK companies, which is searchable by categories such as location, line of business and size.

all Scottish businesses, both by sector and also business size (in terms of number of employees). This was done primarily by grouping together SIC codes to reflect the classifications used by the Impact Assessment Group for the purposes of this survey, according to the matrix shown at Table 2.1:

Table 2.1 Matrix deriving quota classification from SIC codes

	Tourism	Transport	Manu-Facturing	Retail	Other Services	Other
A : Agriculture, hunting and forestry	N/a	n/a	n/a	n/a	n/a	n/a
B : Fishing						*X*
C : Mining and quarrying						*X*
D : Manufacturing			*X*			
E : Electricity, gas and water supply						*X*
F : Construction						*X*
G : Wholesale/retail trade; repair, etc				*X*		
H : Hotels and restaurants	*X*					
I : Transport, storage and communication		*X*				
J : Financial intermediation					*X*	
K : Real estate,renting,business activities					*X*	
L : Public admin/defence; social security						*X*
M : Education					*X*	
N : Health and social work						*X*
O : Other community, social/personal service						*X*
P : Private households with employees						*X*
Q : Extra-territorial organisations/bodies						*X*

The Dun and Bradstreet sample was augmented by two databases, both supplied by VisitScotland. These contained additional contacts for tourism related businesses.

2.3 QUOTAS

Quotas were imposed on the sample to ensure that reliable minimum sub-sample sizes were achieved in terms of the following:

- LEC area.
- Business sector – the business' area of operation, for example 'tourism'.
- Business size, set by the number of employees, from under 5 employees to 25+.

Quotas were derived primarily from the profiles that emerged from the Dun and Bradstreet business database. However, they were given a 'sense check' by both Scottish Enterprise (for the LECs under their remit) and HIE, to allow each organisation to ensure that the quotas best represented the business profiles of their areas, particularly with reference to 'tourism'.

2.4 WEIGHTING

The data was weighted to make sure that the achieved sample matched the profile of businesses within each LEC area. This was done using targets that were supplied by the client, and which took into account the numbers of employees working in each sector, rather than simply the number of businesses. This compensated for the fact that most tourism businesses were likely to be employers of relatively few people, compared to manufacturing businesses that were likely to be much larger scale employers.

A ‘cell weighting’ scheme was used. This involved dividing the overall sample into individual ‘cells’ - in this case defined in terms of business category by LEC area. Thus, for example, all ‘Tourism’ respondents in the sample from the Inverness and Nairn Enterprise area would constitute one ‘cell’.

The purpose behind the weighting was to make sure that the contribution of each of the individual ‘cells’ towards the total result is proportional to each cell’s relative size within the overall Scottish economy. In this case that relative size was determined by using targets based on employment, meaning that overall the figures are representative of the Scottish economy in terms of employment.

The important point to bear in mind is that the weighting process will not change any of the data within an individual ‘cell’. For example, if ‘X’% of ‘Tourism’ respondents in the unweighted sample of the Inverness and Nairn Enterprise area thought ‘Y’ was true, then this figure would remain unaltered in the weighted data. All that the weighting scheme will have done would be to adjust the ‘weight’ given to this opinion when calculating aggregated figures (for example all businesses of any sort in Inverness & Nairn, or all Tourism businesses across all the LECs of Scotland). The weight given will depend on the relative size of the ‘Tourism’ sector in the Inverness & Nairn Enterprise area when compared to the Scottish economy as a whole.

Please note that all data shown in this report is WEIGHTED, except where specifically indicated otherwise.

2.5 ANALYSIS

The weighted data was analysed using the SNAP survey software package, and tables were produced which broke down the data by the following:

- LEC area
- Business sector (from the SIC)
- Business size
- Job title of respondent
- Turnover for last 12 months
- FMD status[6] (‘At risk / infected’ – the area South of the Forth and Clyde, excluding Edinburgh and Glasgow, and ‘Provisionally free’, which is the rest of Scotland, North of the Forth and Clyde, including Edinburgh and Glasgow.)

[6] The last case of FMD in Scotland was on 30th May 2001 and Scotland has been officially disease free since early September. Despite this improving disease situation, for reasons of consistency the definitions used for “at risk/infected” and “provisionally free” have remained the same in all three surveys and are shown on the appended map.

CHAPTER 3 – RESULTS

3.1 OVERALL (CUMULATIVE) IMPACT OF FMD ON ALL BUSINESSES

The first section of this chapter focuses on the overall (cumulative) impact of FMD on businesses in Scotland, from the beginning of the outbreak up to September 2001*. It details the proportion of businesses experiencing any effect from the outbreak during that period and provides an indication of the proportion of businesses who experienced an early but short term impact in April or June which subsequently dissipated, as well as those who suffered some delayed impact from FMD.*

All respondents participating in this latest survey were asked to choose which phrase best described the perceived overall impact of FMD on their business. For those businesses in the "top-up" sample, this was a one-off measure where they were asked whether they had seen a negative effect, a positive effect, a mixed effect or no effect at all from FMD. Those businesses who had participated in the earlier study were reminded of the impact they had recorded in June and asked to say whether they were still unaffected, now perceived (further) negative impact, now perceived (further) positive impact or now perceived mixed effects.

In order to create the most accurate picture of the **cumulative** impact of FMD, the decision was taken to use information only from those businesses who had participated in all three waves of interviewing. Charts 3.1, 3.2 and 3.3 therefore summarise the cumulative impact of FMD based only on the information provided by businesses who had participated in all three waves. The aim was to get an overview of the proportion of all businesses who had been affected by the disease by September 2001, even if the impact had been short-term. It includes, for example, those who claimed an effect in April or June, even if they felt no further effect in September, and those who have experienced both negative and positive impacts at different stages.

Chart 3.1: Cumulative Impact of FMD - Proportions Of Businesses Experiencing Any Impact by September 2001

Base = all respondents answering in all three waves (Weighted Base = 1114)

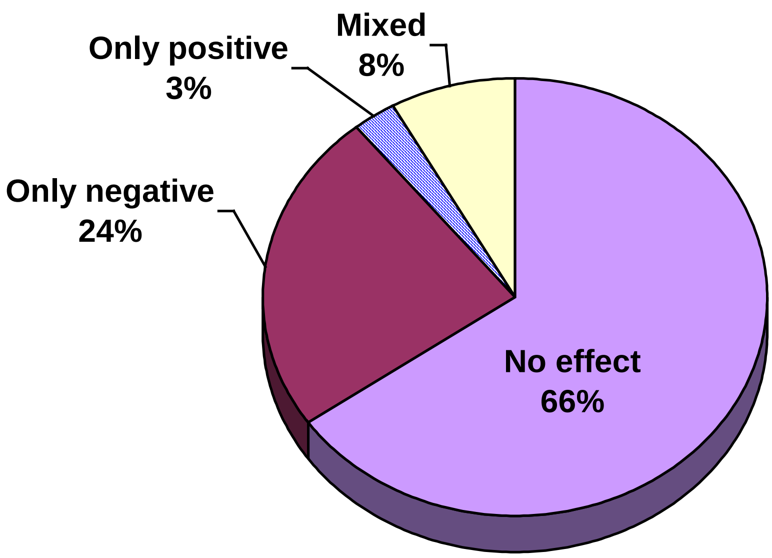


Chart 3.1 shows very clearly that a majority of businesses (66%) have felt no impact from FMD between the beginning of the outbreak and September 2001. Just under one in four (24%) claim FMD has had a negative impact on their business, whilst approximately 3% have experienced positive effects. By September 8% of businesses had experienced a mix of both positive and negative effects as a result of FMD.

Findings from the "top up" sample of businesses, contacted for the first time in September, demonstrate a slightly different picture. A larger proportion of respondents (84%) claimed to have felt no real impact from FMD, only 12% recorded a negative impact, 1% positive and 2% mixed. This lower incidence of impact, albeit in proportion with the larger sample, in part reflects the profile of the top-ups, which is biased towards those sectors less affected by FMD. In addition, we believe that the time-lapse between the initial outbreak and the September wave of fieldwork may have suppressed recall of any short term or negligible impacts.

Chart 3.2: Cumulative Impact of FMD by Area

Base = all respondents answering in all three waves (Weighted Base = 1114)

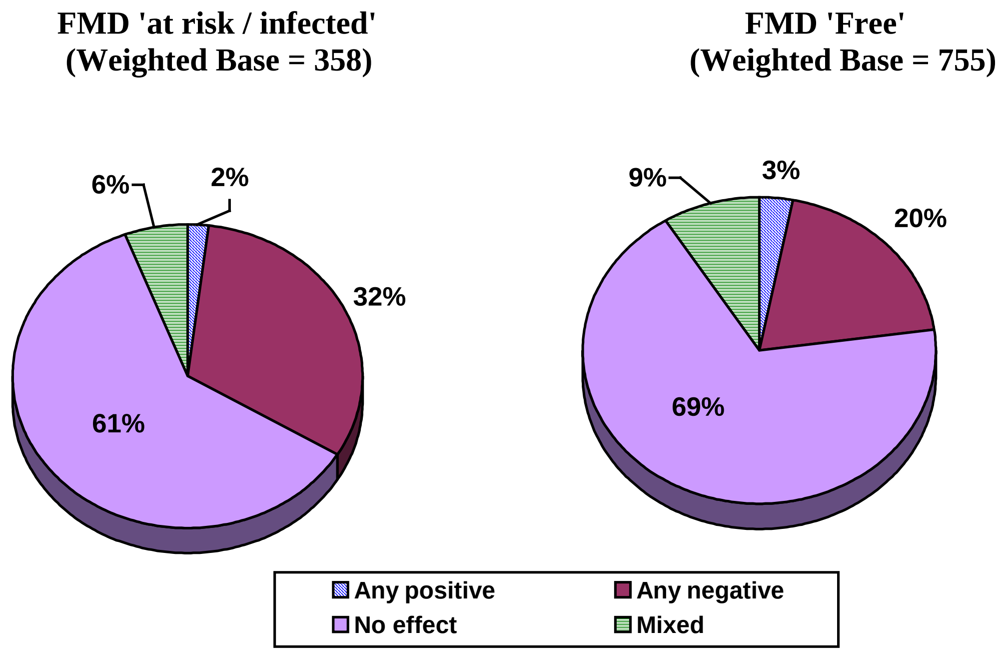


Chart 3.2 demonstrates that the impact has not been confined to infected or 'at risk' areas, although the proportion of business affected adversely is lower in provisionally free areas (20% experiencing any negative impact up to September 2001, compared with 32% in 'at risk/infected areas'). Slightly higher proportions of businesses in provisionally free areas have experienced some positive impact by September 2001, although the majority are unaffected (69% and 61% respectively).

Chart 3.3: Cumulative Impact of FMD by Sector and HIE and SEn area

Base = all respondents answering in all three waves (Weighted Base = 1114)

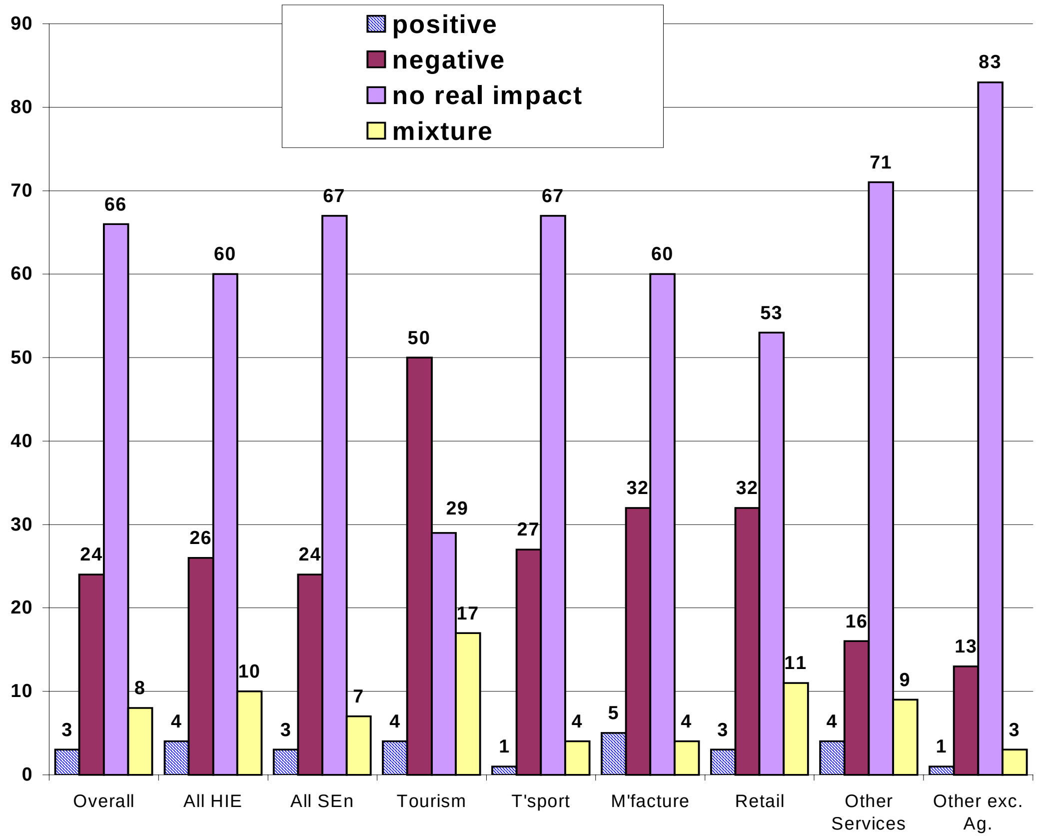


Chart 3.3 shows that the impact has been varied by sector and that tourism businesses have undoubtedly been most widely affected in terms of both positive and negative impact. Less than one in three tourism businesses remain unaffected by September 2001 (29%), with half (50%) recording a negative impact, 4% noting some positive outcome to their business and 17% experiencing mixed effects as a result of FMD. Other sectors recording a higher than average level of impact include retail and manufacturing (32% recording a negative impact), albeit that a majority of businesses in both these sectors are still unaffected. The slightly higher level of impact recorded within the HIE area reflects the importance of the tourism sector within the overall business mix in the Highlands and Islands.

A further measure of the cumulative ongoing impact of FMD was taken by asking respondents who claimed in September that they had seen sales affected by FMD to state the value of **total gains or losses attributable to FMD since the start of the outbreak**. Respondents were encouraged to express the change in terms of actual value (£), but were given the opportunity to express the change in terms of a proportion (%) if they preferred.

Table 3.1a overleaf summarises the cumulative sales losses to September for only those respondents who indicated that they had lost sales revenue, and expressed those losses in terms of absolutes (£). Table 3.1b overleaf summarises the cumulative sales losses to September for only those respondents who indicated that they had lost sales revenue, and expressed those losses in terms of a proportion (%).

Table 3.1a: Total sales lost since 1st March directly attributable to FMD

Base = all 'affected' respondents who claim to have lost sales directly as a result of FMD and expressed those losses in absolute terms (£) (Weighted Base = 53)

	Mean Loss due to FMD – Amount (£)
Base	(53)*
Overall	36,757
Sector	
Tourism	19,440
Transport	164,390
Manufacturing	47,900
Retail	30,875
Other Service	16,054
Other (excluding agriculture)	6,365
Business Size	
Sole Trader	6,401
5 or less	19,093
6-24	44,184
25+	367,265
FMD Status	
FMD provisionally free	38,671
FMD at risk / infected	34,569

Table 3.1b: Total sales lost since 1st March directly attributable to FMD

Base = all 'affected' respondents who claim to have lost sales directly as a result of FMD and expressed those losses as a proportion of sales (%) (Weighted Base = 88)

	Mean Loss due to FMD – Proportion (%)
Base	(88)*
Overall	25
Sector	
Tourism	31
Transport	12
Manufacturing	28
Retail	26
Other Service	22
Other (excluding agriculture)	31
Business Size	
Sole Trader	39
5 or less	21
6-24	23
25+	18
FMD Status	
FMD provisionally free	24
FMD at risk / infected	26

*(Bases do not include respondents who 'don't know')

Table 3.1b suggests that the sector that has been hit most hard is tourism, where those respondents who have lost sales indicated that their average loss was 31%. Although other sectors have witnessed higher average absolute drops in revenue (in particular the transport sector), it must be remembered that tourism businesses are likely to be of a smaller size than businesses in other sectors. This statement holds true for the data by business size – it is the sole traders who register the greatest percentage losses (39%)

The numbers of businesses reporting cumulative gains, in either absolute terms or as a proportion of their business, were extremely small.

3.2 CHANGES TO THOSE BUSINESSES CLAIMING AN IMPACT FROM FMD IN SEPTEMBER

The second section of this chapter focuses on all businesses in Scotland who claimed to be 'affected' by FMD in September*. It looks in greater depth at any changes in staffing levels and sales revenue that these businesses may have experienced between September 2000 and September 2001 and to what extent these changes can be attributed to FMD.*

3.2a Overall Effects

All respondents who claimed to be affected by FMD in September were asked to state, without prompting, in what ways they felt they had been affected. The proportions of the sample citing each effect are summarised in Table 3.2.

Table 3.2: Ways in which FMD has impacted on affected businesses
Base = all respondents (Weighted Base = 2452) / 'affected' respondents (Weighted Base = 356)

	% of businesses who stated each effect	
Base	All respondents (2452)	Affected respondents (356)
Loss of sales	11	76
Loss of future bookings / orders	4	30
Increased costs	3	20
Reduced staffing levels	2	11
Increase in Sales	1	8
Increased future bookings/orders	*	1
Reduced costs	*	1
Increased staffing levels	*	1

It is clear that the most widespread impact has been a reduction in sales (11%). Only 4% of businesses have experienced a loss of future bookings and orders, 3% have experienced increased costs and 2% reduced staffing levels, whilst 1% have seen an increase in sales.

3.2b Employment Patterns

All respondents who claimed to be affected by FMD in September were initially asked to state the numbers of permanent and casual staff in their employment, both 'now', and in September 2000 to get an idea of how numbers might have changed over the period of 12 months. Subsequently those who had experienced changes were asked whether these could be attributable to FMD. Chart 3.4 overleaf summarises the proportion of affected businesses reporting staff changes as a result of FMD.

Chart 3.4: Proportion of 'affected' businesses reporting changes in staffing levels due to FMD

Base = all affected respondents who have experienced staff changes (Weighted Base = 132)

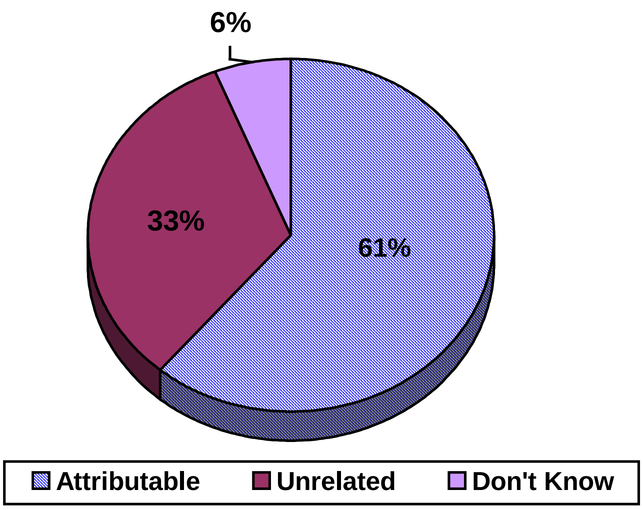


Chart 3.4 shows that for affected businesses reporting staff changes year on year, around three in five (61%) attribute any changes directly to FMD. This suggests a more widespread year on year downturn resulting from other factors, perhaps including the events of September 11th.

Those who had witnessed staffing changes as a result of FMD specifically were filtered into two questions, which asked them to estimate the numbers of full and part time, permanent and casual jobs lost directly as a result of FMD. Chart 3.5 summarises the responses for full and part-time permanent staff:

Chart 3.5: Mean number of permanent staff changes due to FMD by sector of business (Part Time=0.5)

Base = all respondents indicating staff changes as a result of FMD (Weighted Base = 81)

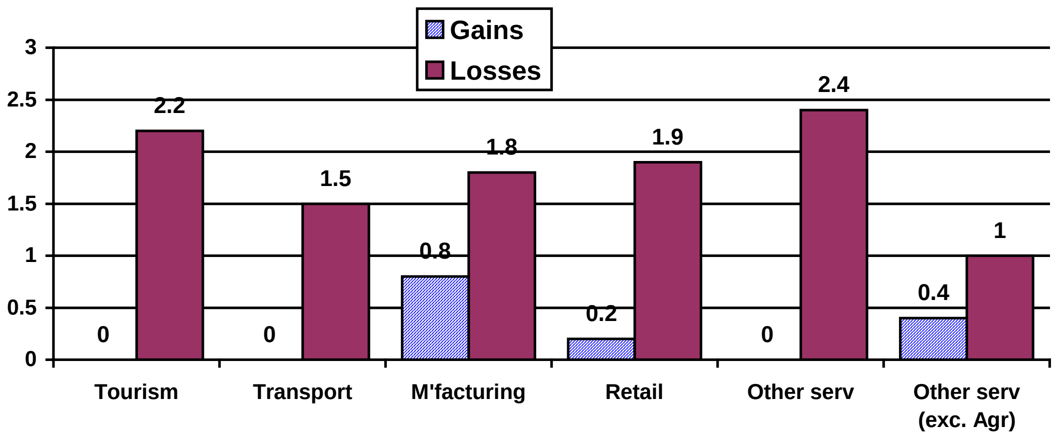


Chart 3.5 shows the extent to which it is mostly permanent staff losses, rather than gains, which are attributable to FMD, and a similar pattern is also evident for casual staff changes. In the case of permanent staff changes, there are no sectors where the average number of staff gains have been even comparable to the staff losses. The most extreme examples of this are other services and tourism businesses where, amongst those claiming an FMD induced change in staffing levels, an average of 2.4 and 2.2 permanent jobs respectively have been lost whilst none have been gained. For casual staff changes the numbers are small and the differences generally less pronounced.

Respondents were then asked to state whether they thought that these changes in staffing levels would be temporary or permanent. Chart 3.6 summarises the results.

Chart 3.6: Proportion of Permanent / Temporary staff changes due to FMD by sector of business

Base = all respondents indicating staff changes as a result of FMD (Weighted Base = 81)

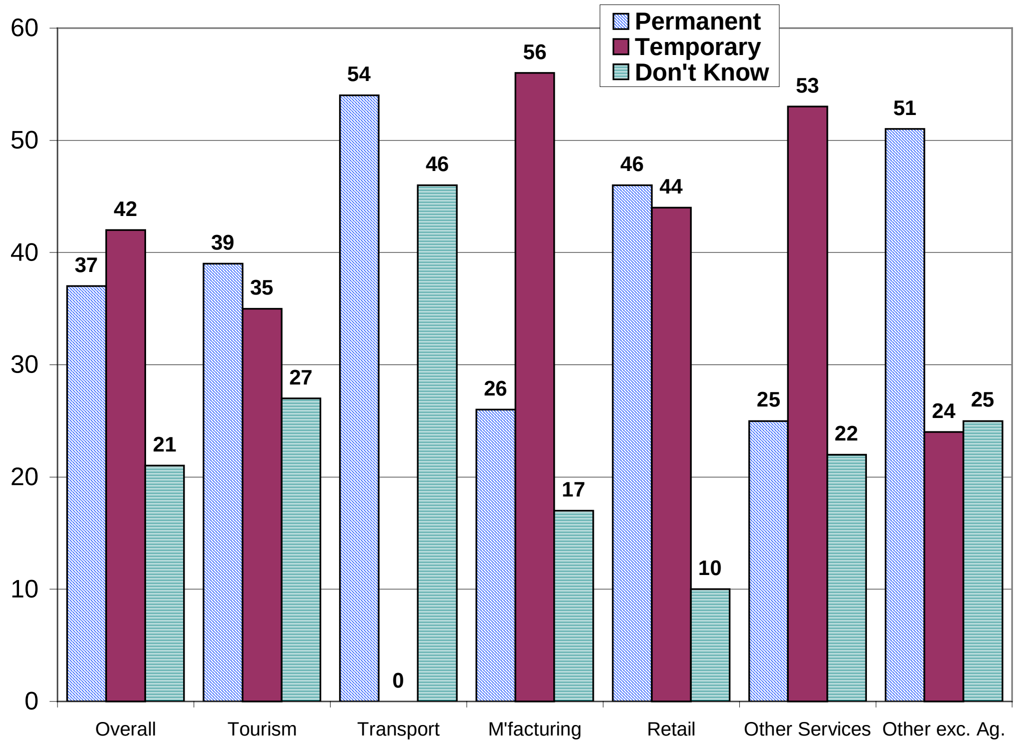


Chart 3.6 shows very mixed views as to whether year on year changes in staffing levels due to FMD will be short-term or permanent. Overall, around 42% of businesses state changes should be temporary, a slightly smaller proportion believe they could be permanent (37%) and one in five feel unable to predict the long term outcome. Manufacturing and other service businesses in particular think changes may be more long-term (56% and 53% respectively state permanent) whilst transport businesses, who have witnessed one of the lowest numbers of permanent staff losses, are more likely to believe cut-backs will be short-term.

3.2c Sales Revenue

Affected businesses who claimed that year on year sales for September had been affected by FMD were asked to think back to a year ago and compare their sales revenue for the months of September 2000 and September 2001. 50% of businesses reported that sales had fallen over the period, whilst only 4% reported an increase in sales. However, not all of the change was attributed to FMD.

Chart 3.7: Proportion of 'affected' businesses seeing sales changes due to FMD

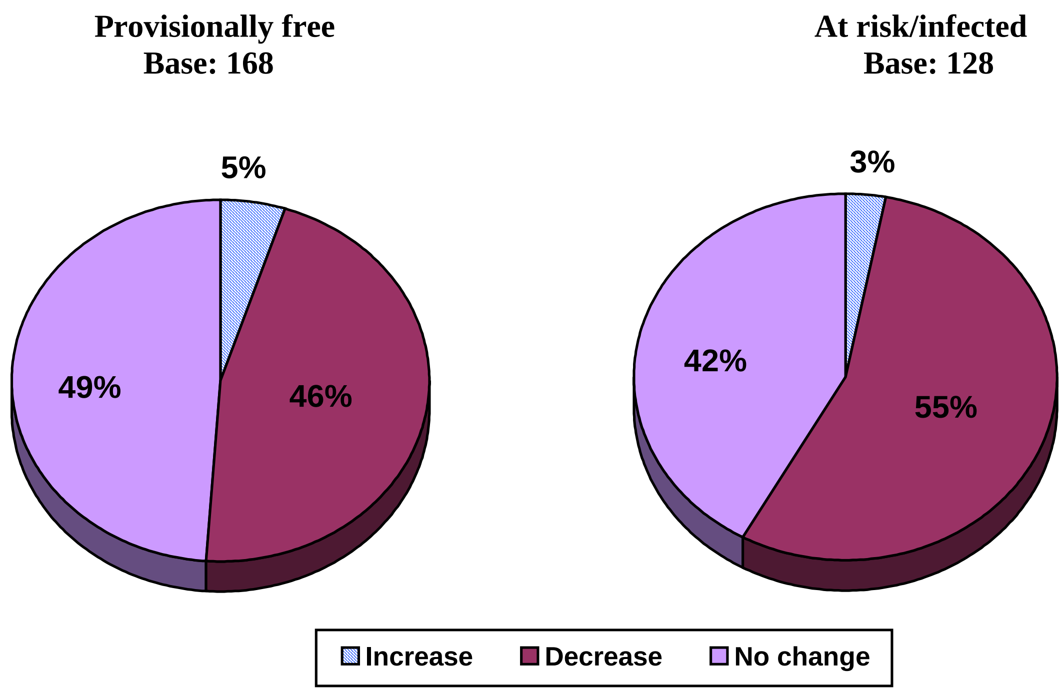


Chart 3.7 shows that in provisionally free areas 46% of businesses experiencing year on year changes in September claim losses were directly due to FMD, compared with only 5% citing a gain directly due to the epidemic. In at risk or infected areas a slightly higher 55% of businesses experiencing year on year changes cite losses attributable to foot and mouth and only 3% claim a related increase in sales revenue.

Respondents who had witnessed either an increase or decrease in sales revenue due to FMD were asked to estimate the extent of this change. Respondents were encouraged to express the change in terms of actual value (£), but were given the opportunity to express the change in terms of a proportion (%) if they preferred.

Chart 3.8a overleaf summarises the year on year sales losses in September for only those respondents who indicated that they had lost sales revenue directly due to FMD, and expressed those losses in terms of absolutes (£). Chart 3.8b overleaf summarises the losses in September for only those respondents who indicated that they had lost sales revenue directly due to FMD, and expressed those losses in terms of a proportion (%).

Chart 3.8a: Year on year sales losses in September directly attributable to FMD

Base = all recording sales losses directly due to FMD and expressing those losses in absolute terms (Weighted Base = 27)

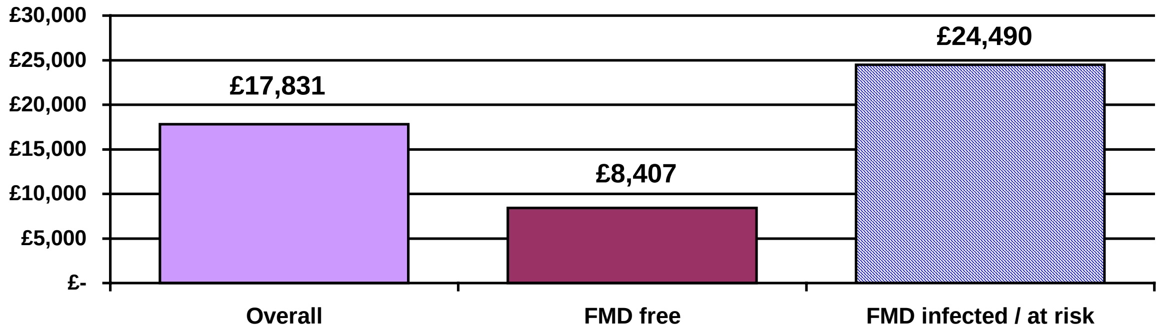
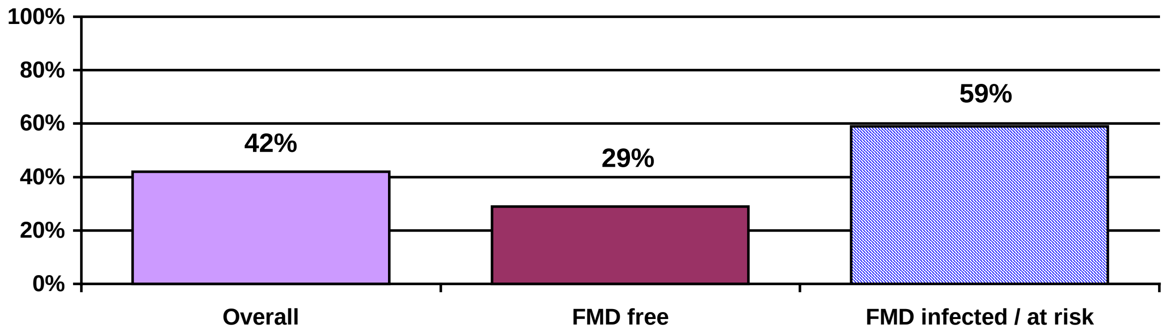


Chart 3.8b: Year on year sales losses in September directly attributable to FMD

Base = all recording sales losses directly due to FMD and expressing those losses as a proportion (Weighted Base = 114)



*(Bases do not include respondents who 'don't know')

Chart 3.8b suggests that the average loss as a proportion of sales is around 42% with fairly limited variation between business sizes. The proportion of business lost due to FMD in at risk / infected areas is almost double that in provisionally free areas. A similarly large differential is evident amongst those businesses expressing losses due to FMD in absolute terms. By sector, transport businesses appear to have suffered both the largest proportional and absolute losses (57% or £217,661).

Respondents who had lost business as a result of FMD were asked to say from what geographic area the business had been lost, giving the proportion lost locally, from elsewhere in Scotland, elsewhere in the UK or outside the UK. The findings are shown in Chart 3.9 overleaf.

Chart 3.9: Proportion of business lost due to FMD by customer location

Base = all respondents specifying FMD decrease in sales (Weighted Base = 160)

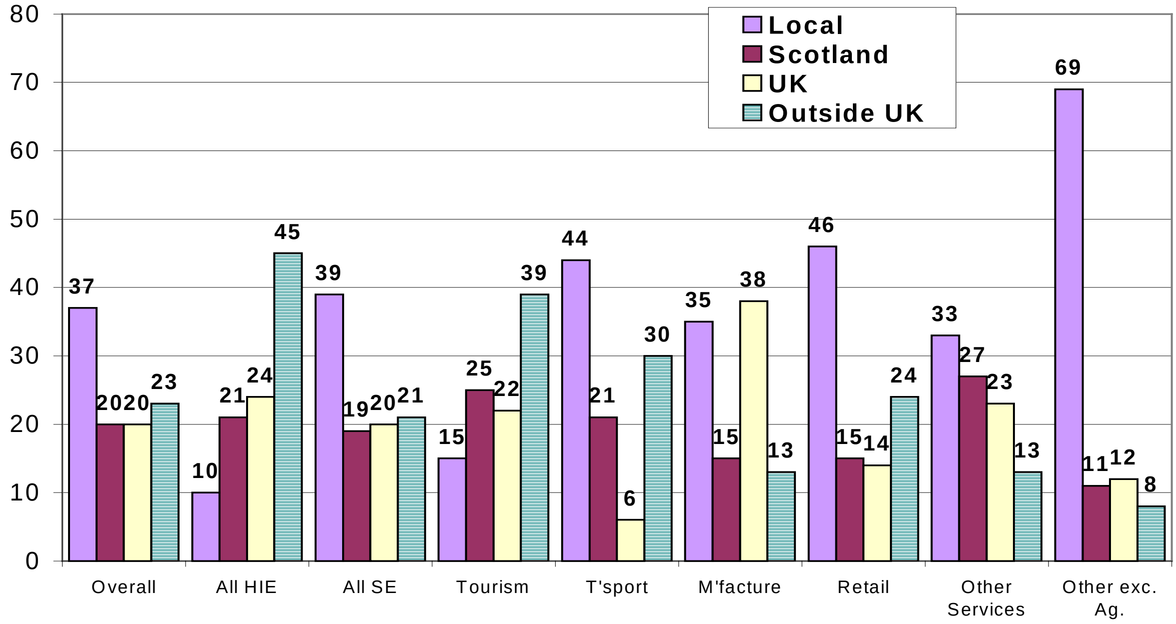


Chart 3.9 clearly shows that overall more business is lost from local customers than any other group (37%). The most notable example of this is in the cases of 'other businesses excluding agriculture' where 69% of lost business was from local markets, followed most closely by retail and transport businesses where 46% and 44% was lost locally respectively. Tourism businesses meanwhile show quite a different pattern, as lost business is primarily from outside the UK (39%) and declines to only 15% of business lost locally. The prominence of tourism related businesses in the HIE area is demonstrated by the HIE overall losses where 45% of business is lost from outside the UK.

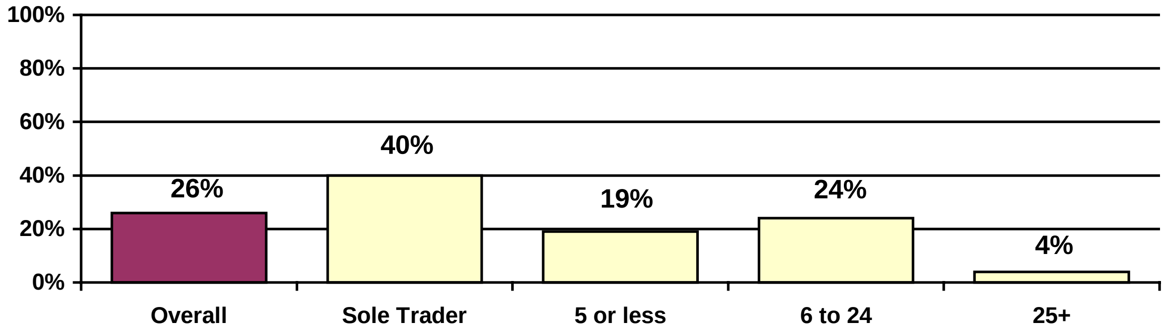
3.2d Losses/Gains To Future Orders or Bookings

As a further measure of the impact of FMD, respondents were asked to say whether they knew of any definite orders or bookings for the future, which had been cancelled or made directly as a result of Foot and Mouth (over and above those already detailed). Again, respondents were encouraged to express the change in terms of actual value (£), but were given the opportunity to express the change in terms of a proportion (%) if they preferred.

The results of losses are detailed in Chart 3.10a overleaf in terms of the value (in absolute terms) and in Chart 3.10b as a proportion of turnover.

Chart 3.10a: Definite future orders lost DIRECTLY as a result of FMD
Base: all specifying decrease due to FMD and expressing the loss in absolute terms
(Weighted base = 32)

Chart 3.10b: Definite future orders lost DIRECTLY as a result of FMD
Base: all specifying decrease due to FMD and expressing the loss as a proportion
(Weighted base = 37)



*(Bases do not include respondents who 'don't know')

Chart 3.10b suggests that on average 26% of definite orders or bookings for the future are known to have been cancelled / lost directly as a result of Foot and Mouth with no variation between the at risk / infected areas and those provisionally free. Whilst sole traders experienced the lowest value losses in absolute terms, their proportional losses due to cancellations were considerably higher than larger businesses.

3.2e Changes to Costs

Finally, in considering the ways in which FMD has impacted on affected businesses, those businesses citing changes to their costs in September and attributing these changes to FMD, were asked to identify those items where costs have either increased or decreased. The top 4 items affected by increases are summarised in Table 3.3 overleaf.

Table 3.3: 'Top 4' items where costs are cited as having increased (%)
Base = All respondents claiming an increase in costs as a result of FMD (71)

Item	**% citing an increase**
Fuel	30
Marketing / Advertising	11
Disinfectant	7
Stock materials	7

Table 3.3 shows that the items cited most widely as having contributed to cost increases are 'Fuel' and 'Marketing / Advertising' followed by 'Disinfectant' and 'Stock Materials'.

3.3 TRACKING DATA – YEAR ON YEAR IMPACT OF FMD IN SEPTEMBER COMPARED TO YEAR ON YEAR IMPACT IN APRIL AND JUNE

The final section of this chapter ***compares the impact of FMD in April, June and September 2001.***

In order to understand any changes in employment, which are attributable to FMD and unaffected by seasonal changes, businesses perceiving an impact from the epidemic were asked to cite the number of permanent and casual, full and part time jobs, that had been lost or gained directly due to FMD.

Table 3.4 shows the proportion of **all** businesses recording year on year changes attributable to FMD.

Table 3.4: Proportion of all businesses seeing year on year staff changes attributable to FMD (%)
Base = all respondents (2452 in September / 2617 in June / 2722 in April)

	April %	June %	September %
Base	(2722)	(2617)	(2452)
Staff changes attributable to FMD	5	5	3
No staff changes attributable to FMD	95	95	96
Don't know	*	*	*

* = less than 1%

Table 3.4 clearly shows that **in both the April and June surveys only 5% of all businesses could attribute any staff changes from the same month in the previous year directly to FMD. By September the proportion has decreased further to only 3%.** Inevitably there are variations by sector, and the tourism sector records the highest year on year changes attributable to FMD in all three survey months (13%, 16% and 7% respectively). There is also a higher likelihood of staff changes attributable to FMD in infected or at risk areas than in provisionally free areas. 6%, 7% and 6% of businesses in infected/at risk areas recorded changes due to FMD in April, June and September respectively, compared with 4%, 3% and 2% in provisionally free areas.

In order to understand the type of year on year staff changes resulting from FMD, respondents were asked to specify whether these had been permanent or casual staff gains or losses. Tables 3.5 and 3.6 overleaf summarise the proportion of all businesses recording gains and losses attributable to FMD in all three months.

Table 3.5: Incidence of permanent staff gains / losses attributable to FMD (%)
Base = all respondents (2452 in September / 2617 in June / 2722 in April)

	April %	June %	September %
Base	(2722)	(2617)	(2452)
Any gain	1	*	*
Any loss	4	4	3
No change attributable	95	96	97
Don't know	1	*	*

* = less than 1%

Table 3.5 shows that the proportions of businesses experiencing permanent staff gains or losses due to FMD are very similar for April, June and September. **A vast majority of businesses record no changes to either permanent or casual staff levels over the months that could be attributed to FMD.** In all months, there is a higher incidence of permanent staff changes than casual staff changes and a higher proportion of all businesses have seen permanent staff losses than gains (3% or 4% recording losses in all months compared with 1% or less recording gains).

When data is examined by sector, permanent staff losses due to FMD are most pronounced amongst tourism businesses (11% of tourism businesses lost permanent employees in April, 14% in June, although down to 5% in September).

Those businesses recording staff changes due to FMD were asked whether they expected staff gains or losses to be permanent or temporary and table 3.6 overleaf records the outcome for all three months.

Table 3.6: Whether total gains / losses attributable to FMD will be permanent / temporary (%)

Base = all respondents (2452 in September / 2617 in June / 2722 in April)

	April %	June %	September %
Base	(2722)	(2617)	(2452)
Permanent changes to staffing levels due to FMD	1	*	1
Temporary changes to staffing levels due to FMD	2	3	1
Don't Know whether changes permanent or temporary	1	*	1
No changes due to FMD	95	95	96
Not known whether change due to FMD	*	*	*

* = less than 1%

Table 3.6 shows that in April and June respondents willing to specify whether they thought the staff changes directly attributable to FMD would be temporary or permanent, were most likely to expect them to be short-term. By September, despite smaller numbers of staff changes, views were more mixed on the long-term outcome.

In order to understand any changes in turnover, which are attributable to FMD and unaffected by seasonal changes, businesses perceiving an impact from the epidemic were asked to cite whether sales had been lost or gained directly due to FMD.

Table 3.7 shows the proportion of all businesses recording year on year changes to sales for each month that are attributable to FMD.

Table 3.7: Proportion of all businesses experiencing year on year changes in sales due to FMD (%)

Base = all respondents (2452 in September / 2617 in June / 2722 in April)

	April %	June %	September %
Base	(2722)	(2617)	(2452)
Any gain (£ or %) attributable to FMD	1	1	*
Any loss (£ or %) attributable to FMD	16	10	7
No change in sales attributable to FMD	78	86	90
Don't know if sales change attributable to FMD	1	3	3
Sales changes unknown	4	-	-

* = less than 1%

Table 3.7 clearly shows that a very small proportion of businesses confirm a gain in sales revenue that is directly attributable to FMD in any month (1% or less). However, the proportion recording losses has reduced from a level of 16% in April to 10% in June and only 7% in September. Even in 'at risk/infected' areas, the proportion of businesses recording year on year losses due to FMD has decreased from 20% in April to 14% in June and 11% in September. Overall, the incidence of businesses whose year on year sales are unaffected by FMD had increased to 90% by September 2001.

In terms of sector, tourism businesses are the most likely to have seen an impact on sales due to FMD in all waves; 40% recorded losses in April, down to 24% in June and only 17% in September.

Respondents who had lost business as a result of FMD were asked to say from what geographic area the business had been lost, giving the proportion lost locally, from elsewhere in Scotland, elsewhere in the UK or outside the UK. The findings are shown in Chart 3.8.

Table 3.8: Proportion of all business lost due to FMD by customer location

Base = all respondents who had lost business as a result of FMD (Weighted Base : 160 in September / 268 in June / 435 in April)

	April %	**June** %	**September** %
Local	48	41	37
Scotland	23	23	20
UK	18	19	20
Outside UK	9	16	23

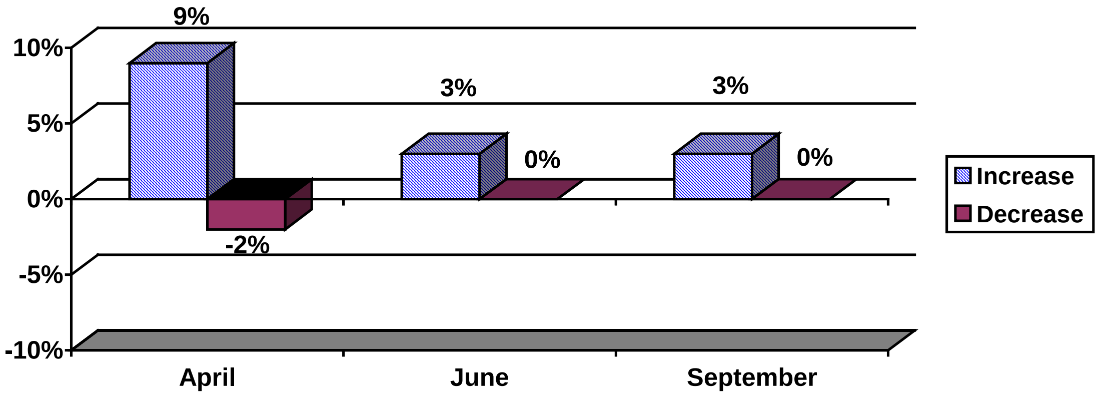
Table 3.8 shows that in all three months more business was lost from local customers than any other group (48%, 41% and 37% respectively). However, as the months have progressed there has been an increase in the proportion of business lost from outside Scotland, reflecting the significance of tourism for seasonally adjusted sales figures in June and September.

In tracking the impact of FMD, a number of questions were also asked to explore the issue of business costs, to find out how they might have changed as a result of the Foot and Mouth outbreak. The first question was asked to get an overall impression of the numbers of businesses who felt that their costs might have changed.

Chart 3.11 overleaf shows the proportion of businesses who claim to have seen changes in costs as a result of FMD.

Chart 3.11: Changes in costs due to FMD

Base = all respondents (Weighted Base : 2452 in September / 2617 in June / 2722 in April)



By far the most important point, is that a vast majority of businesses have not seen their costs change at all as a result of FMD with the proportion observing any impact in June or September considerably lower than in April. In June and September only 3% record an increase in costs (compared with 9% in April) and none have seen a decrease.

Respondents were asked to listen to a list of measures that businesses might take in order to deal with any negative impact from FMD. They were asked to comment on whether they had already taken the measure, or whether they might at some point in the future. Tables 9a and 9b summarise the **cumulative** results in terms of the measures recorded by those businesses who had participated in all three waves of interviewing. It provides information in terms of the measures recorded as having been taken in April, then the cumulative figure for all those having taken each measure by June and finally by September:

Table 3.9a: Measures which businesses HAVE TAKEN for negative impact of FMD

Base = all respondents answering in all three waves (Weighted Base : 1114)

	Scotland April %	Scotland June %	Scotland September %
Cancel / postpone recruitment	3	5	7
Increase marketing / advertising	2	4	6
Cancel / postpone capital investment	2	5	6
Reducing prices to attract business	2	4	6
Cancel / postpone events	3	3	5
Temporarily laying off staff	1	2	4
Making redundancies	1	1	3
Trying to sell the business	*	1	1
Temporarily closing the business	*	*	*
Permanently closing business[7]	-	-	-

* = less than 1%

[7] In September, there were 3 instances of re-contacts where interviewers were informed of business closures and in only one case was this attributed directly to FMD

Table 3.9b: Measures which businesses HAVE TAKEN for negative impact of FMD by FMD status

Base = all respondents answering in all three waves (Weighted Base : 358 at risk or infected / 755 provisionally free)

	FMD 'Free' April %	FMD 'Free' June %	FMD 'Free' Sept %	FMD 'at risk / infected' April %	FMD 'at risk / infected' June %	FMD 'at risk / infected' Sept %
Cancel / postpone recruitment	3	3	4	5	9	12
Increase marketing / advertising	2	2	4	4	9	11
Reducing prices to attract business	1	2	4	3	7	11
Cancel / postpone capital investment	1	3	5	3	8	10
Cancel / postpone events	2	2	3	5	6	9
Temporarily laying off staff	1	2	3	1	4	6
Making redundancies	1	1	2	1	2	6
Trying to sell the business	*	1	1	1	1	1
Temporarily closing the business	*	*	*	1	1	1
Permanently closing the business	-	-	-	-	-	-

* = less than 1%

Table 3.9a clearly shows that the most widespread actions taken by September have been to cancel or postpone recruitment or capital investment, increase marketing activity and reduce prices to attract business, each taken by over one in twenty businesses. The most widespread actions have not changed significantly as the months have progressed although the proportion who have taken each measure does show a significant increase between April and September. Detailed analysis shows that, for example, two in five affected businesses that claimed in April that they would not consider cancelling or postponing staff recruitment had subsequently taken this action by September. A majority of those claiming in April they would not consider increased marketing, reducing prices or cancelling/postponing capital investment had also subsequently capitulated.

Differences between the provisionally free and affected/at risk areas are fairly small in April although by June and September those in affected areas are around three times more likely to have implemented the top three measures (to cancel or postpone recruitment, to increase marketing activity and reduce prices).

It is apparent that the likelihood of having taken the most widespread measure, to cancel or postpone the recruitment of new staff, is highest amongst tourism businesses (21% compared to 13% or less for each of the other sectors).

In theory there could have been a difficulty identifying businesses that have already totally shut down, as they might not have responded to telephone calls from our interviewers. It is not possible to be sure whether or not any of our calls failed for that reason, but we can make the point that overall response rates for this survey were higher than usual. If there had been a major problem with businesses having ceased trading and no longer taking calls then the response rate would have been more adversely affected.

Respondents whose businesses had felt any negative impact from FMD were asked which, if any, sources they had gone to for help or advice about their business because of the Foot and Mouth outbreak. At each stage, no single source has been cited by more than one in four affected businesses. However, the initial emphasis on family and friends (cited by 26% and 21% respectively in April) has decreased over time to levels of 20% and 16% in September. Conversely, there has been an increase in the proportion of affected businesses turning to more formal sources such as Banks (17% in April increasing to 23% in September) and LECs (7% in April increasing to 15% in September). Accountants / financial advisers have been a popular source of advice throughout (25% in April and 23% in both June and September).

Finally, in considering the ongoing impact of FMD, Table 3.10 is based only on those businesses who participated in both the April, June **and** September studies and shows the extent to which businesses have felt changes in the impact of FMD since the outbreak first began.

Table 3.10 Perceived Ongoing Impact of FMD for re-contacts by September
Base = all respondents answering in all waves (Weighted Base =1114)

	SEPTEMBER		
	No Impact April %	**Negative Impact April** %	**Positive Impact April** %
BASE	(830)	(242)	(42)
No impact at any point	89	-	-
Only negative impact at any stage	8	81	-
Only positive impact at any stage	1	-	57
Mixed impact	3	19	43

A large majority of those unaffected in April still recorded no impact by September (89%). Just under one in ten (8%) later recorded negative effects, 1% observed positive impact and 3% recorded a mixture of both positive and negative influences on their business. Conversely, 19% of those adversely affected in April have subsequently seen some positive impact to help counteract those adverse effects. Amongst those observing a positive impact at the outset of the outbreak, by far the smallest proportion of businesses, around two in five (43%) have subsequently felt more mixed effects although a majority have only seen benefit.

Chapter 4 – SUPPORTING DATA

4.1 WILLINGNESS TO BE RECONTACTED

Question 9b asked all respondents if they would be willing to participate in a possible brief follow up interview at some point in the future. The weighted information from this question is summarised below in Table 4.1

TABLE 4.1: Willingness to be re-contacted

Base: all respondents (2452)

	Agree to re-contact (%)
All	83
Sector	
Tourism	90
Transport	73
Manufacturing	81
Retail	81
Other Service	74
Other (excluding agriculture)	93
Area	
Scottish Enterprise	
Highlands and Islands Enterprise	81
	83
Business Size	
Sole Trader	76
5 or less	85
6-24	84
25+	69
FMD Status	
FMD provisionally free	79
FMD at risk / infected	87
Respondent Category	
Top-ups	71
Re-contact	87

Table 4.1 demonstrates the very high levels of agreement that have been recorded throughout Scotland, well in excess of what might be expected from a standard survey of this complexity amongst a business audience. Responses for all groups range between 69% and 93% (averaging at 83% overall). It should be noted that despite these high levels of apparent willingness to be re-contacted, the effective re-contact rate in September was at a level of 76%, somewhat lower than the 92% who agreed they would be happy to be re-contacted back in June. Of those businesses who did not participate when re-contacted, a majority declined because of time pressures or other reasons unrelated to FMD. One had ceased trading as a result of Foot and Mouth.

4.2 SAMPLE SIZE BY 'CELL'

The following table (4.2) summarises the entire sample in terms of business sector by LEC. These are the unweighted bases that were then fed into the weighting scheme.

	All	Tourism	Transport	M'facturing	Retail	Other Servs	Other
HIE							
Argyll	100	32	5	7	38	12	6
Caithness	100	29	4	6	38	15	8
Inv & Nairn	100	27	4	7	35	18	9
Lochaber	95	45	4	1	25	14	6
MBSE	101	30	2	6	33	19	11
Orkney	101	27	6	6	37	15	10
Ross & Crom	102	37	3	8	30	15	9
Shetland	100	24	6	6	40	15	9
Skye & Loch	100	38	3	5	30	15	9
Western Isl	100	30	8	2	30	18	12
Sen							
Ayrshire	108	20	5	22	17	15	29
Borders	109	19	3	23	18	15	31
Dumfries & Galloway	111	19	7	22	15	12	36
Dunb'shire	92	15	4	14	17	18	24
Edin & Loth	217	30	10	27	29	60	61
Fife	105	20	3	26	19	17	20
Forth Valley	99	20	4	22	18	20	15
Glasgow	191	30	12	18	32	68	31
Grampian	109	22	6	13	16	25	27
Lanark	110	22	6	20	21	21	20
Renfrew	91	15	6	14	18	18	20
Tayside	111	24	3	14	23	24	23

4.3 WEIGHTED TOTAL BY CELL

The following table (4.3) summarises the entire sample in terms of business sector by LEC. These are the weighted bases that were used for reporting.

HIE	All	Tourism	Transport	M'facturing	Retail	Other Servs	Other
Argyll	27	4	2	2	5	3	13
Caithness	17	2	1	3	3	3	6
Inv & Nairn	46	4	3	4	9	6	20
Lochaber	10	2	1	1	2	1	3
MBSE	34	4	1	6	6	5	12
Orkney	10	1	1	1	2	1	4
Ross & Crom	18	2	1	3	3	3	7
Shetland	17	1	2	2	2	2	8
Skye & Loch	5	1	-	-	1	1	2
Western Isl	13	1	1	2	2	2	5
Sen							
Ayrshire	144	11	7	32	25	21	49
Borders	42	5	1	10	8	5	12
Dumfries & Galloway	61	6	4	12	9	7	23
Dunb'shire	76	6	3	10	13	14	31
Edin & Loth	449	28	22	59	63	139	138
Fife	142	13	5	34	26	23	42
Forth Valley	126	8	5	24	21	26	41
Glasgow	404	25	24	37	58	120	140
Grampian	229	18	13	30	31	51	87
Lanark	244	13	17	52	45	40	77
Renfrew	152	9	10	29	28	27	49
Tayside	187	16	7	26	36	35	66

Annex 1: Questionnaires

<u>FMD SURVEY - October 2001</u>
Telephone Questionnaire For Re-Contacts

<u>STRICTLY PRIVATE AND CONFIDENTIAL</u>

This questionnaire is the property of George Street Research Limited, 24 Broughton Street, Edinburgh, EH1 3RH. Telephone 0131 478 7520

Respondent's Name . . . .

Telephone Number. . . . .

Interviewer Name . . . . Interviewer Number . . . .

Date of Interview . . . .

Respondent ID Number (from 2nd survey) . . . .

2951 Re-Contacts

ASK TO SPEAK TO THE NAMED RESPONDENT
Good morning/afternoon/evening. My name is … and I'm calling from George Street Research, an independent research agency based in Scotland, regarding a survey we are conducting on behalf of the Scottish Executive, Scottish Enterprise / Highlands & Islands Enterprise and the Scottish Tourist Board. You may recall that you were good enough to take part in an interview in June regarding the impact of the Foot and Mouth epidemic on a broad cross section of businesses throughout Scotland. At that time you very kindly agreed that we could re-contact you to help in monitoring the longer term impact of the epidemic.

As before, it is important that we talk to all types of business, regardless of whether they feel they are directly affected or not, to establish whether they have seen any change in the possible effect on their business. The questions focus solely on the impact of Foot and Mouth, rather than any other issues that might affect business performance, and should take no more than a few minutes of your time. Would you be willing to answer a few short questions?

Yes	1	See routing before Q1
No	2	Code reason below, then thank and close

Reason for non-participation

Too busy just now	1 Date/Time to re-contact . . . .
Too busy generally	2
Unaffected by FMD	3
Other (write in) ……………………………………….	4
Business closed (attributable to FMD)	17
Business closed (not attributable to FMD)	18
Business closed (relationship to FMD unknown)	19
No reason given	20

ALL WHO CLAIMED NO REAL IMPACT IN JUNE (CODE 1 AT Q1A OR Q2A OR Q3A) GO TO Q1
ALL WHO CLAIMED NEGATIVE IMPACT IN JUNE (CODE 2 AT Q1A OR Q2A OR Q3A) GO TO Q2
ALL WHO CLAIMED POSITIVE IMPACT IN JUNE (CODE 3 AT Q1A OR Q2A OR Q3A) GO TO Q3
ALL WHO CLAIMED MIXED IMPACT IN JUNE (CODE 4 AT Q1A OR Q2A OR Q3A) GO TO Q3

ASK ALL WHO CLAIMED NO REAL IMPACT IN JUNE (CODE 1 AT Q1A OR Q2A OR Q3A)

1a When we spoke to you at the end of June you said that the Foot & Mouth epidemic had not had any real impact on your business, either positive or negative. Would you say there has still been no real impact since we spoke in June, that there has now been a negative impact on your business or that there has now been a positive impact on your business as a result of the epidemic.

Still no real impact	1	- Ask Q1b
Negative impact	2	- Ask Q1c
Positive impact	3	- Ask Q1d
Mixed impact	4	- Ask Q1c
Don't know	5	- Ask Q1b

ASK ALL CODED 1 OR 5 AT Q1a

1b I'd like to thank you for giving up the time to help us again with this very important survey. Your assistance is of enormous value and we are extremely grateful for the help you've given. Would you be willing to participate in another brief follow-up at some point in the future?

Yes, willing	1	THANK AND CLOSE
No, not willing	2	THANK AND CLOSE

ASK ALL PERCEIVING ANY NEGATIVE IMPACT (CODE 2 OR 4 AT Q1a)

1c Please could you tell me in which of the following ways your business has felt a negative impact from the Foot & Mouth epidemic? READ OUT AND CODE BELOW

Loss of sales since we last spoke	1	- IF CODE 2 AT Q1a GO TO Q4
Loss of future bookings/orders	2	- IF CODE 2 AT Q1a GO TO Q4
Increased costs to business	3	- IF CODE 2 AT Q1a GO TO Q4
Reduced staffing	4	- IF CODE 2 AT Q1a GO TO Q4
Other (write in)	5	- IF CODE 2 AT Q1a GO TO Q4
. . . .		
Don't know	6	- IF CODE 2 AT Q1a GO TO Q4

ASK ALL PERCEIVING ANY POSITIVE IMPACT (CODE 3 OR 4 AT Q1a)

1d Please could you tell me in which of the following ways your business has felt a positive impact from the Foot & Mouth epidemic? READ OUT AND CODE BELOW -

Increased sales since we last spoke	1	- GO TO Q4
Growth in future bookings/orders	2	- GO TO Q4
Decreased costs to business	3	- GO TO Q4
Increased staffing	4	- GO TO Q4
Other (write in)	5	- GO TO Q4
. . . .		
Don't know	6	- GO TO Q4

ASK ALL WHO CLAIMED NEGATIVE IMPACT IN JUNE (CODE 2 AT Q1A OR Q2A OR Q3A)

2a When we spoke to you at the end of June you said that the Foot & Mouth epidemic had had a negative impact on your business. Would you say there has been continuing negative impact since that time, that there has now been a positive impact on your business or that there has been no change to the impact on your business since that time.

No real impact since	1	- Ask Q2b
Negative impact	2	- Ask Q2c
Positive impact	3	- Ask Q2d
Mixed impact	4	- Ask Q2c
Don't know	5	- Ask Q2b

ASK ALL CODED 1 OR 5 AT Q2a

2b I'd like to thank you for giving up the time to help us again with this very important survey. Your assistance is of enormous value and we are extremely grateful for the help you've given. Would you be willing to participate in another brief follow-up at some point in the future?

Yes, willing	1	THANK AND CLOSE
No, not willing	2	THANK AND CLOSE

ASK ALL PERCEIVING ANY NEGATIVE IMPACT (CODE 2 OR 4 AT Q2a)

2c Please could you tell me in which of the following ways your business has felt a continuing negative impact from the Foot & Mouth epidemic since we last spoke? READ OUT AND CODE BELOW

Loss of sales since we last spoke	1	- IF CODE 2 AT Q2a GO TO Q4
Loss of future bookings/orders	2	- IF CODE 2 AT Q2a GO TO Q4
Increased costs to business	3	- IF CODE 2 AT Q2a GO TO Q4
Reduced staffing	4	- IF CODE 2 AT Q2a GO TO Q4
Other (write in)	5	- IF CODE 2 AT Q2a GO TO Q4
. . . .		
Don't know	6	- IF CODE 2 AT Q2a GO TO Q4

ASK ALL PERCEIVING ANY POSITIVE IMPACT (CODE 3 OR 4 AT Q2a)

2d Please could you tell me in which of the following ways your business has started to feel a positive impact from the Foot & Mouth epidemic? READ OUT AND CODE BELOW

Increased sales since we last spoke	1	- GO TO Q4
Growth in future bookings/orders	2	- GO TO Q4
Decreased costs to business	3	- GO TO Q4
Increased staffing	4	- GO TO Q4
Other (write in)	5	- GO TO Q4
. . . .		
Don't know	5	- GO TO Q4

ASK ALL WHO CLAIMED POSITIVE OR MIXED IMPACT IN JUNE (CODE 3 OR 4 AT Q1A OR Q2A OR Q3A)

3a When we spoke to you at the end of June you said that the Foot & Mouth epidemic had had a (POSITIVE / MIXED) impact on your business. Would you say there has been a continuing (POSITIVE / MIXED) impact since that time, that there has now been a negative impact on your business or that there has been no change to the impact on your business since that time.

No real impact since	1	- Ask Q3b
Negative impact	2	- Ask Q3c
Positive impact	3	- Ask Q3d
Mixed impact	4	- Ask Q3c
Don't know	5	- Ask Q3b

ASK ALL CODED 1 OR 5 AT Q3a

3b I'd like to thank you for giving up the time to help us again with this very important survey. Your assistance is of enormous value and we are extremely grateful for the help you've given. Would you be willing to participate in another brief follow-up at some point in the future?

Yes, willing	1	THANK AND CLOSE
No, not willing	2	THANK AND CLOSE

ASK ALL PERCEIVING ANY NEGATIVE IMPACT (CODE 2 OR 4 AT Q3a)

3c Please could you tell me in which of the following ways your business has felt a negative impact from the Foot & Mouth epidemic since we last spoke? READ OUT AND CODE BELOW

Loss of sales since we last spoke	1	- IF CODE 2 AT Q3a GO TO Q4
Loss of future bookings/orders	2	- IF CODE 2 AT Q3a GO TO Q4
Increased costs to business	3	- IF CODE 2 AT Q3a GO TO Q4
Reduced staffing	4	- IF CODE 2 AT Q3a GO TO Q4
Other (write in)	5	- IF CODE 2 AT Q3a GO TO Q4
. . . .		
Don't know	5	- IF CODE 2 AT Q3a GO TO Q4

ASK ALL PERCEIVING ANY POSITIVE IMPACT (CODE 3 OR 4 AT Q3a)

3d Please could you tell me in which of the following ways your business has felt a positive impact from the Foot & Mouth epidemic? READ OUT AND CODE BELOW

Increased sales since we last spoke	1	- GO TO Q4
Growth in future bookings/orders	2	- GO TO Q4
Decreased costs to business	3	- GO TO Q4
Increased staffing	4	- GO TO Q4
Other (write in)	5	- GO TO Q4
. . . .		
Don't know	6	- GO TO Q4

ASK ALL RESPONDENTS

4a To help us in understanding any impact on employment, keeping in mind that some businesses see seasonal changes in employment levels, please can I ask you to think back to a year ago. Can you tell me approximately how many permanent full and part time staff, and how many "casual" (or temporary) full and part time staff were employed by your business, at this particular site, in September last year?

4b And if this has changed can you tell me how many are employed by the business now? EITHER CODE "NO CHANGE" OR WRITE IN NUMBERS

	September 2000	**Now**
No Staff	1	1
Permanent - Full Time	. . . . . (No.)	. . . . . (No.)
Permanent - Part Time	. . . . . (No.)	. . . . . (No.)
Casual – Full Time	. . . . . (No.)	. . . . . (No.)
Casual – Part Time	. . . . . (No.)	. . . . . (No.)

ASK ALL WHO HAVE SEEN A CHANGE IN STAFF NUMBERS Q4C OTHERS GO TO ROUTING BEFORE Q5

ASK ALL WHO HAVE SEEN A CHANGE IN STAFF NUMBERS

4c Would you attribute any of the change(s) in staff levels directly to the Foot & Mouth epidemic or is it unrelated?

Attributable to F&M	1	ASK 4d
Unrelated	2	GO TO ROUTING BEFORE Q5
Don't know	3	GO TO ROUTING BEFORE Q5

ASK ALL CODED 1 AT Q4c

4d Please could you tell me the number of staff changes that are directly attributable to the Foot & Mouth epidemic. That is the number of full-time, part-time and casual jobs gained or lost because of Foot & Mouth compared with a year ago.

	Gained	**Lost**
Permanent - Full Time	. . . . . (No.)	. . . . . (No.)
Permanent - Part Time	. . . . . (No.)	. . . . . (No.)
Casual – Full Time	. . . . . (No.)	. . . . . (No.)
Casual – Part Time	. . . . . (No.)	. . . . . (No.)
Don’t know	1	1

4e And do you expect this to be a permanent or temporary change in staff numbers?

Permanent	1
Temporary	2
Don't know	3

ASK Q5 OF ALL RESPONDENTS CODED 1 AT 1c/1d, 2c/2d or 3c/3d. OTHERS GO TO ROUTING BEFORE Q6

ASK Q5 OF ALL RESPONDENTS CODED 1 AT 1c/1d, 2c/2d or 3c/3d.

5a Again, please could you try to think back a year and compare sales revenue for the months of September 2000 and September 2001, regardless of whether any change might be attributable to the Foot & Mouth epidemic. Would you say there has been an increase in sales, a decrease in sales or that there has been little or no overall change?

Increase	1	- Ask Q5b
Decrease	2	- Ask Q5b
No overall change	3	- GO TO Q5c
Don't know	4	- GO TO Q5c

5b Please could you tell me the approximate value of that change in sales revenue between September last year and September this year? WRITE IN AMOUNT BELOW. IF RESPONDENT IS UNABLE TO QUOTE AN AMOUNT PLEASE ASK FOR A PROPORTION (%) OF BUSINESS LOST

.£ . . . . **OR** . . . .%

5c Please could you tell me the approximate value of any change in sales for September which you think is directly attributable to Foot & Mouth? WRITE IN AMOUNT BELOW. IF RESPONDENT IS UNABLE TO QUOTE AN AMOUNT PLEASE ASK FOR A PROPORTION (%) OF BUSINESS LOST/GAINED

£ . . . . **OR** . . . .% LOST
£ . . . . **OR** . . . .% GAINED

5d And what proportion of that has been lost/gained from local customers? (‘local’ means within about 30 miles.) And from customers elsewhere in Scotland? And from elsewhere in the UK? And from outside the UK?

Local	. . . . . (%)
Scotland	. . . . . (%)
UK	. . . . . (%)
Outside UK	. . . . . (%)

5e Overall, thinking about the period since the 1st March when the first case of Foot & Mouth was confirmed in Scotland what do you believe to be the total value of sales gained or lost by your business as a result of the epidemic. WRITE IN AMOUNT BELOW. IF RESPONDENT IS UNABLE TO QUOTE AN AMOUNT PLEASE ASK FOR A PROPORTION (%) OF BUSINESS LOST/GAINED

£ . . . . **OR** . . . .% LOST
£ . . . . **OR** . . . .% GAINED

ASK Q6 OF ALL RESPONDENTS CODED 2 AT 1c/1d, 2c/2d or 3c/3d. OTHERS GO TO ROUTING BEFORE Q7

ASK Q6 OF ALL RESPONDENTS CODED 2 AT 1c/1d, 2c/2d or 3c/3d.

6 Please think now about any DEFINITE orders or bookings for the future which you KNOW have been cancelled (or made) DIRECTLY as a result of Foot & Mouth. These would be over and above any losses already experienced. Can you tell me what you think the total value of those orders might be?
WRITE IN AMOUNT BELOW. IF RESPONDENT IS UNABLE TO QUOTE AN AMOUNT PLEASE ASK FOR A PROPORTION (%) OF BUSINESS LOST/GAINED

£	**OR**	. . . .%	(LOST)
£	**OR**	. . . .%	(GAINED)

ASK Q7 OF ALL RESPONDENTS CODED 3 AT 1c/1d, 2c/2d or 3c/3d. OTHERS GO TO ROUTING BEFORE Q8

ASK Q7 OF ALL RESPONDENTS CODED 3 AT 1c/1d, 2c/2d or 3c/3d.

7 You mentioned that costs to your business have changed as a result of the epidemic. Please can you tell me what costs have changed and the approximate proportion of increase/decrease you have seen (in percentage terms)? Please mention up to 5 of the most important changes.

Item (write in)	**Increase**	**Decrease**
. . . .	. . . . . (%)	. . . . . (%)
. . . .	. . . . . (%)	. . . . . (%)
. . . .	. . . . . (%)	. . . . . (%)
. . . .	. . . . . (%)	. . . . . (%)
. . . .	. . . . . (%)	. . . . . (%)

ASK ALL CODED 2 OR 4 AT Q1a, 2a OR 3a. OTHERS GO TO Q9

ASK ALL CODED 2 OR 4 AT Q1a, 2a OR 3a.

8a I'm going to read out a number of measures that business might take in order to deal with any negative impact of the Foot & Mouth epidemic. For each one I read out, please could you tell me whether:

- you have already taken that measure,
- will consider it if the situation remains unchanged for another month,
- would consider it longer term or,
- will not consider it at all.

ROTATE ORDER OF READING. READ OUT AND CODE BELOW

	Taken	month	Longer	Not cons	DK
Temporarily closing the business	1	2	3	4	5
Permanently closing the business	1	2	3	4	5
Reducing staff working hours	1	2	3	4	5
Encouraging staff to take holidays	1	2	3	4	5
Reducing the number of opening hours / days	1	2	3	4	5
Making redundancies	1	2	3	4	5
Taking out a loan	1	2	3	4	5
Renegotiating existing loans or borrowings	1	2	3	4	5
Cancelling or postponing capital investment	1	2	3	4	5
Cancelling or postponing recruitment of new staff	1	2	3	4	5
Cancelling/postponing planned events	1	2	3	4	5
Increased marketing or advertising	1	2	3	4	5
Reducing prices to attract business	1	2	3	4	5
Trying to sell the business	1	2	3	4	5
Temporarily laying off staff	1	2	3	4	5
Anything else (write in below)	1	2	3	4	5

. . . .

8b Have you gone to any of the following for help or advice about your business because of the Foot and Mouth Disease outbreak?
ROTATE ORDER OF READING. READ OUT AND CODE BELOW

	Yes	No
Banks	1	2
Accountants / financial advisers	1	2
Family members	1	2
Friends	1	2
Local Enterprise Companies	1	2
Federation of Small Business	1	2
Chamber of Commerce	1	2
Trade Associations	1	2
Council / local authority	1	2
MP / MSP	1	2
Scottish Executive	1	2
Tourist Board	1	2
Small Business Gateway	1	2
Tax Helpline	1	2
Counselling Service	1	2
Other please write in	1	2
. . . .	1	2

ASK FOR EACH SOURCE CODED 1 ABOVE:

8c Please could you tell me how useful you found the advice given by ……? That is, very useful, quite useful, not very useful or not at all useful?

	Very	**Quite**	**NV**	**NA A**	**DK**
Banks	1	2	3	4	5
Accountants / financial advisers	1	2	3	4	5
Family members	1	2	3	4	5
Friends	1	2	3	4	5
Local Enterprise Companies	1	2	3	4	5
Federation of Small Business	1	2	3	4	5
Chamber of Commerce	1	2	3	4	5
Trade Associations	1	2	3	4	5
Council / local authority	1	2	3	4	5
MP / MSP	1	2	3	4	5
Scottish Executive	1	2	3	4	5
Tourist Board	1	2	3	4	5
Small Business Gateway	1	2	3	4	5
Tax Helpline	1	2	3	4	5
Counselling Service	1	2	3	4	5
Other please write	1	2	3	4	5
. . . .	1	2	3	4	5

ASK ALL RESPONDENTS

9 I'd like to thank you for giving up the time to help us again with this very important survey. The results are of significant value in informing the Executive’s response to the outbreak and we are extremely grateful for the help you’ve given. The aggregate findings of the first two surveys have been published on the Scottish Executive website (If prompted the address is www.scotland.gov.uk/publications). Would you be willing to participate in some further work on this topic in the future?

Yes, willing	1	THANK AND CLOSE
No, not willing	2	THANK AND CLOSE

10 Finally, are there any other comments you would like to make regarding the Foot & Mouth epidemic and its impact on your business?

PLEASE WRITE IN

…………………………………………………………………………………………

…………………………………………………………………………………………

…………………………………………………………………………………………

…………………………………………………………………………………………

…………………………………………………………………………………………

…………………………………………………………………………………………

FMD SURVEY - OCTOBER 2001
Telephone Questionnaire For Top-Up Interviews

STRICTLY PRIVATE AND CONFIDENTIAL

This questionnaire is the property of George Street Research Limited, 24 Broughton Street, Edinburgh, EH1 3RH. Telephone 0131 478 7520

Respondent's Name . . . .

Job Title . . . .

Business Name . . . .

Address . . . .

. . . .

Full Postcode . . . . Telephone Number. . . ..

Interviewer Name . . . . Interviewer Number . . . .

Date of Interview . . . . Respondent ID Number . . . .

SIC (code from sample)………………………………………………………………………………..

CLASSIFICATION

Sector

Tourism (accommodation)	1
Tourism (attractions)	2
Tourism (events / activities)	3
Transport	4
Manufacturing	5
Retail	6
Other services	7
Other	8

Size (No. of employees at this site)

Sole Trader	1
5 or less	2
6 - 9	3
10 - 24	4
25+ (write in no. …………)	5

Job Title

Proprietor	1
MD/CEO	2
Director/Senior Manager	3
Other (write in below)	4

. . . .

LEC Area

Ayrshire	1
Borders	2
Dunbartonshire	3
Edinburgh & Lothians	4
Fife	5
Forth Valley	6
Glasgow	7
Grampian	8
Lanark	9
MBSE	10
Renfrewshire	11
Tayside	12
Argyll	13
Caithness	14
Inverness & Nairn	15
Lochaber	16
Orkney	17
Ross & Cromarty	18
Shetland	19
Skye & Lochalsh	20
Western Isles	21
Dumfries & Galloway	22

Job Number 2951 top-up interviews

ASK TO SPEAK TO THE OWNER/MANAGER

Good morning/afternoon/evening. My name is … and I'm calling from George Street Research, an independent research agency based in Scotland, regarding a survey we are conducting on behalf of the Scottish Executive, Scottish Enterprise / Highlands & Islands Enterprise and the Scottish Tourist Board. This is the third study to be commissioned in order to assess and monitor the impact of the Foot and Mouth epidemic on a broad cross section of businesses throughout Scotland. Your assistance with this survey would be of enormous help in understanding the current situation and helping to guide the recovery process. The questions focus solely on the impact of Foot and Mouth, rather than any other issues that might affect business performance, and the interview will take no more than 10 minutes. It is important that we talk to all types of business, regardless of whether they feel they are directly affected or not.

Would you be willing to answer a few short questions?

Yes	1	Proceed to Q1
No	2	Record reason then thank and close

Reason for non-participation

Too busy just now	1 Time to re-contact . . . .
Too busy generally	2
Unaffected by FMD	3
Other (write in) ……………………………………………………..	4
Business closed (attributable to FMD)	17
Business closed (not attributable to FMD)	18
Business closed (relationship to FMD unknown)	19
No reason given	20

1a Overall, which of the following phrases best describes the impact of the Foot & Mouth epidemic on your business? Would you say it's had a negative impact, a positive impact or no real impact overall?

No real impact	1	- Ask Q1b
Negative impact	2	- Ask Q1c
Positive impact	3	- Ask Q1d
Mixed impact	4	- Ask Q1c
Don't know	5	- Ask Q1b

ASK ALL CODED 1 OR 5 AT Q1a

1b I'd like to thank you for giving up the time to help with this very important survey. Your assistance is of enormous value and we are extremely grateful for the help you've given. Would you be willing to participate in some further work on the subject of Foot and Mouth in the future?

Yes, willing	1	THANK AND CLOSE
No, not willing	2	THANK AND CLOSE

ASK ALL PERCEIVING ANY NEGATIVE IMPACT (CODE 2 OR 4 AT Q1a)

1c Please could you tell me in which of the following ways your business has felt a negative impact from the Foot & Mouth epidemic? READ OUT AND CODE BELOW

Loss of sales	1	- IF CODE 2 AT Q1a GO TO Q4
Loss of future bookings/orders	2	- IF CODE 2 AT Q1a GO TO Q4
Increased costs to business	3	- IF CODE 2 AT Q1a GO TO Q4
Reduced staffing	4	- IF CODE 2 AT Q1a GO TO Q4
Other (write in)	5	- IF CODE 2 AT Q1a GO TO Q4
. . . .		
Don't know	6	- IF CODE 2 AT Q1a GO TO Q4

ASK ALL PERCEIVING ANY POSITIVE IMPACT (CODE 3 OR 4 AT Q1a)

1d Please could you tell me in which of the following ways your business has felt a positive impact from the Foot & Mouth epidemic? READ OUT AND CODE BELOW

Increased sales	1	- GO TO Q4
Growth in future bookings/orders	2	- GO TO Q4
Decreased costs to business	3	- GO TO Q4
Increased staffing	4	- GO TO Q4
Other (write in)	5	- GO TO Q4
. . . .		
Don't know	6	- GO TO Q4

(THERE ARE NO QUESTIONS 2 OR 3)

ASK ALL RESPONDENTS

4a To help us in understanding any impact on employment, keeping in mind that some businesses see seasonal changes in employment levels, please can I ask you to think back to a year ago. Can you tell me approximately how many permanent full and part time staff, and how many "casual" (or temporary) full and part time staff were employed by your business, at this particular site, in September last year?

4b And if this has changed can you tell me how many are employed by the business now? EITHER CODE "NO CHANGE" OR WRITE IN NUMBERS

	September 2000	**Now**
No Staff	1	1
Permanent - Full Time	. . . . . (No.)	. . . . . (No.)
Permanent - Part Time	. . . . . (No.)	. . . . . (No.)
Casual – Full Time	. . . . . (No.)	. . . . . (No.)
Casual – Part Time	. . . . . (No.)	. . . . . (No.)

ASK ALL WHO HAVE SEEN A CHANGE IN STAFF NUMBERS ASK Q4C OTHERS GO TO ROUTING BEFORE Q5

ASK ALL WHO HAVE SEEN A CHANGE IN STAFF NUMBERS

4c Would you attribute any of the change(s) in staff levels directly to the Foot & Mouth epidemic or is it unrelated?

Attributable to F&M	1	ASK 4d
Unrelated	2	GO TO ROUTING BEFORE Q5
Don't know	3	GO TO ROUTING BEFORE Q5

ASK ALL CODED 1 AT Q4c

4d Please could you tell me the number of staff changes that are directly attributable to the Foot & Mouth epidemic. That is the number of full-time, part-time and casual jobs gained or lost because of Foot & Mouth compared with a year ago.

	Gained	**Lost**
Permanent - Full Time	. . . . . (No.)	. . . . . (No.)
Permanent - Part Time	. . . . . (No.)	. . . . . (No.)
Casual – Full Time	. . . . . (No.)	. . . . . (No.)
Casual – Part Time	. . . . . (No.)	. . . . . (No.)

4e And do you expect this to be a permanent or temporary change in staff numbers?

Permanent	1
Temporary	2
Don't know	3

ASK Q5 OF ALL RESPONDENTS CODED 1 AT 1c or 1d
OTHERS GO TO ROUTING BEFORE Q6

ASK Q5 OF ALL RESPONDENTS CODED 1 AT 1c/1d

5a Again, please could you try to think back a year and compare sales revenue for the months of September 2000 and September 2001, regardless of whether any change might be attributable to the Foot & Mouth epidemic. Would you say there has been an increase in sales, a decrease in sales or that there has been little or no overall change?

Increase	1	- Ask Q5b
Decrease	2	- Ask Q5b
No overall change	3	- GO TO Q5c
Don't know	4	- GO TO Q5c

5b Please could you tell me the approximate value of that change in sales revenue between September last year and September this year? WRITE IN AMOUNT BELOW. IF RESPONDENT IS UNABLE TO QUOTE AN AMOUNT PLEASE ASK FOR A PROPORTION (%) OF BUSINESS LOST

.£ . . . . **OR** . . . .%

5c Please could you tell me the approximate value of any change in sales for September which you think is directly attributable to Foot & Mouth? WRITE IN AMOUNT BELOW. IF RESPONDENT IS UNABLE TO QUOTE AN AMOUNT PLEASE ASK FOR A PROPORTION (%) OF BUSINESS LOST/GAINED

£	**OR**	. . . .%	LOST
£	**OR**	. . . .%	GAINED

5d And what proportion of that has been lost/gained from local customers? (‘local’ means within about 30 miles.) And from customers elsewhere in Scotland? And from elsewhere in the UK? And from outside the UK?

Local	. . . . . (%)
Scotland	. . . . . (%)
UK	. . . . . (%)
Outside UK	. . . . . (%)

5e Overall, thinking about the period since the 1st March when the first case of Foot & Mouth was confirmed in Scotland what do you believe to be the total value of sales gained or lost by your business as a result of the epidemic. WRITE IN AMOUNT BELOW. IF RESPONDENT IS UNABLE TO QUOTE AN AMOUNT PLEASE ASK FOR A PROPORTION (%) OF BUSINESS LOST/GAINED

£	**OR**	. . . .%	LOST
£	**OR**	. . . .%	GAINED

ASK Q6 OF ALL RESPONDENTS CODED 2 AT 1c/1d
OTHERS GO TO ROUTING BEFORE Q7

ASK Q6 OF ALL RESPONDENTS CODED 2 AT 1c/1d

6 Please think now about any DEFINITE orders or bookings for the future which you KNOW have been cancelled (or made) DIRECTLY as a result of Foot & Mouth. These would be over and above any losses already experienced. Can you tell me what you think the total value of those orders might be?
WRITE IN AMOUNT BELOW. IF RESPONDENT IS UNABLE TO QUOTE AN AMOUNT PLEASE ASK FOR A PROPORTION (%) OF BUSINESS LOST/GAINED

.£ . . . . **OR** . . . .%

ASK Q7 OF ALL RESPONDENTS CODED 3 AT 1c/1d
OTHERS GO TO ROUTING BEFORE Q8

ASK Q7 OF ALL RESPONDENTS CODED 3 AT 1c/1d

7 You mentioned that costs to your business have changed as a result of the epidemic. Please can you tell me what costs have changed and the approximate proportion of increase/decrease you have seen (in percentage terms)? Please mention up to 5 of the most important changes.

Item (write in)	**Increase**	**Decrease**
. . . .	. . . . . (%)	. . . . . (%)
. . . .	. . . . . (%)	. . . . . (%)
. . . .	. . . . . (%)	. . . . . (%)
. . . .	. . . . . (%)	. . . . . (%)
. . . .	. . . . . (%)	. . . . . (%)

ASK ALL CODED 2 OR 4 AT Q1a.
OTHERS GO TO Q9

ASK ALL CODED 2 OR 4 AT Q1a.

8a I'm going to read out a number of measures that business might take in order to deal with any negative impact of the Foot & Mouth epidemic. For each one I read out, please could you tell me whether:

- you have already taken that measure,
- will consider it if the situation remains unchanged for another month,
- would consider it longer term or,
- will not consider it at all.

ROTATE ORDER OF READING. READ OUT AND CODE BELOW

	Tak en	mon th	Lon ger	Not cons	DK
Temporarily closing the business	1	2	3	4	5
Permanently closing the business	1	2	3	4	5
Reducing staff working hours	1	2	3	4	5
Encouraging staff to take holidays	1	2	3	4	5
Reducing the number of opening hours / days	1	2	3	4	5
Making redundancies	1	2	3	4	5
Taking out a loan	1	2	3	4	5
Renegotiating existing loans or borrowings	1	2	3	4	5
Cancelling or postponing capital investment	1	2	3	4	5
Cancelling or postponing recruitment of new staff	1	2	3	4	5
Cancelling/postponing planned events	1	2	3	4	5
Increased marketing or advertising	1	2	3	4	5
Reducing prices to attract business	1	2	3	4	5
Trying to sell the business	1	2	3	4	5
Temporarily laying off staff	1	2	3	4	5
Anything else (write in below)	1	2	3	4	5
. . . .					

8b Have you gone to any of the following for help or advice about your business because of the Foot and Mouth Disease outbreak?
ROTATE ORDER OF READING. READ OUT AND CODE BELOW

	Yes	No
Banks	1	2
Accountants / financial advisers	1	2
Family members	1	2
Friends	1	2
Local Enterprise Companies	1	2
Federation of Small Business	1	2
Chamber of Commerce	1	2
Trade Associations	1	2
Council / local authority	1	2
MP / MSP	1	2
Scottish Executive	1	2
Tourist Board	1	2
Small Business Gateway	1	2
Tax Helpline	1	2
Counselling Service	1	2
Other… please write in		
…………………………………………….	1	2
…………………………………………….	1	2

ASK FOR EACH SOURCE CODED 1 ABOVE:

8c Please could you tell me how useful you found the advice given by ……? That is, very useful, quite useful, not very useful or not at all useful?

	Ver y	**Quit e**	**NV**	**NA A**	**DK**
Banks	1	2	3	4	5
Accountants / financial advisers	1	2	3	4	5
Family members	1	2	3	4	5
Friends	1	2	3	4	5
Local Enterprise Companies	1	2	3	4	5
Federation of Small Business	1	2	3	4	5
Chamber of Commerce	1	2	3	4	5
Trade Associations	1	2	3	4	5
Council / local authority	1	2	3	4	5
MP / MSP	1	2	3	4	5
Scottish Executive	1	2	3	4	5
Tourist Board	1	2	3	4	5
Small Business Gateway	1	2	3	4	5
Tax Helpline	1	2	3	4	5
Counselling Service	1	2	3	4	5
Other… please write in ………………………………………	1	2	3	4	5
………………………………………	1	2	3	4	5

ASK ALL RESPONDENTS

9a Finally, please could you tell me the estimated turnover of the business at this particular site for the twelve months up to 31st March 2001?

£ . . . . (WRITE IN)

(IF BUSINESS NOT TRADING FOR FULL 12 MONTH PERIOD, THEN ASK:

When did the business at this site start to trade? Month………Year………..

And what was its estimated turnover between then and 31st March 2001?

£ . . . . (WRITE IN)

9 I'd like to thank you for giving up the time to help with this very important survey. The results are of significant value in informing the Executive's response to the outbreak and we are extremely grateful for the help you've given. The aggregate findings of the first two surveys have been published on the Scottish Executive website (If prompted the address is www.scotland.gov.uk/publications). Would you be willing to participate in some further work on the subject of Foot and Mouth in the future?

Yes, willing	1	THANK AND CLOSE
No, not willing	2	THANK AND CLOSE

10 Finally, are there any other comments you would like to make regarding the Foot & Mouth epidemic and its impact on your business?

PLEASE WRITE IN

………………………………………………………………………………………

………………………………………………………………………………………

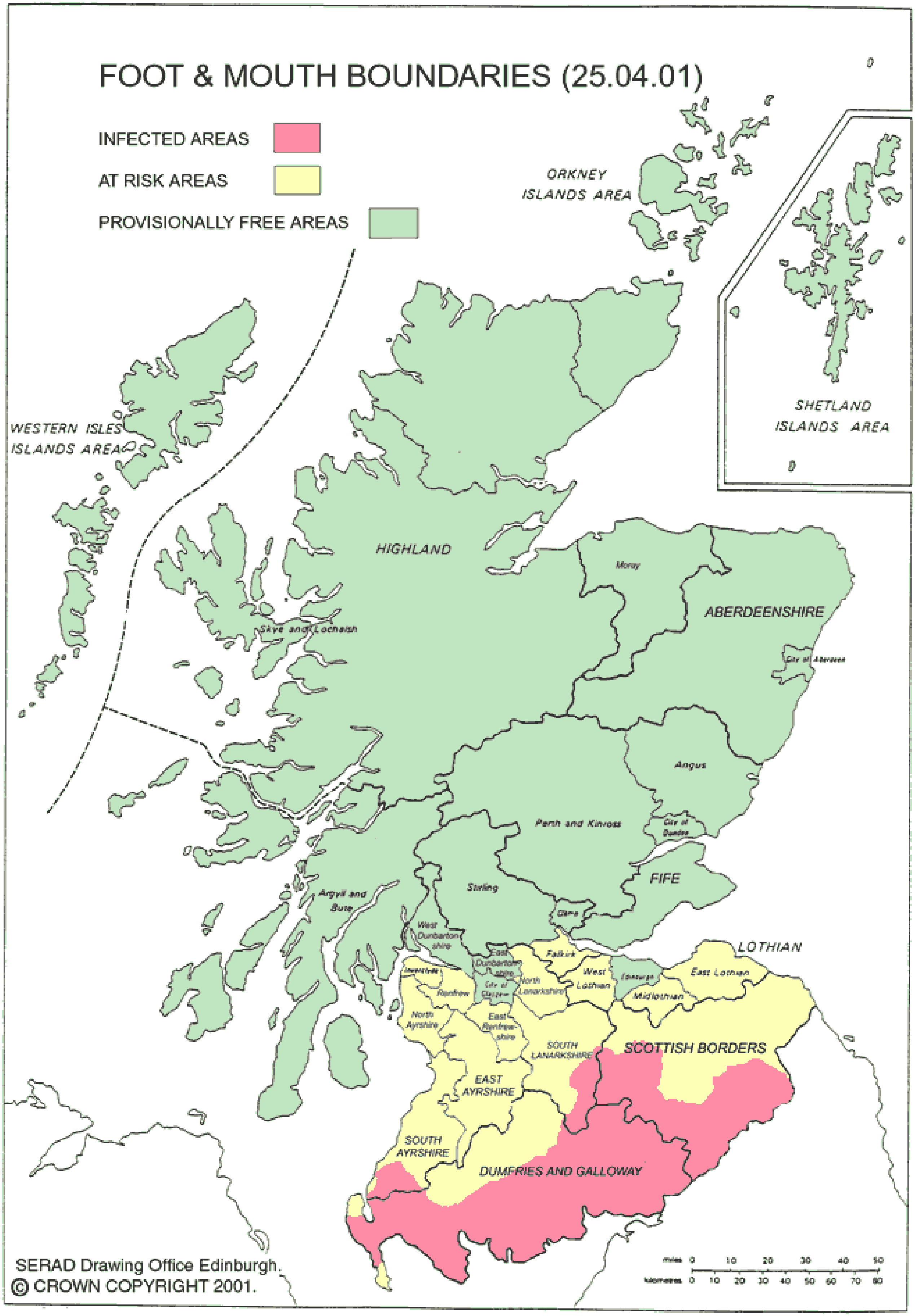
………………………………………………………………………………………

………………………………………………………………………………………

………………………………………………………………………………………

………………………………………………………………………………………

Annex 2: Foot and Mouth Boundaries



FOOT & MOUTH BOUNDARIES (25.04.01)
INFECTED AREAS
AT RISK AREAS
PROVISIONALLY FREE AREAS
ORKNEY ISLANDS AREA
SHETLAND ISLANDS AREA
WESTERN ISLES ISLANDS AREA
HIGHLAND
Moray
ABERDEENSHIRE
Skye and Lochalsh
Angus
Perth and Kinross
City of Dundee
FIFE
Stirling
Argyll and Bute
West Dunbartonshire
Falkirk
West Lothian
East Dunbartonshire
City of Glasgow
North Lanarkshire
Renfrew
North Ayrshire
East Renfrewshire
SOUTH LANARKSHIRE
EAST AYRSHIRE
SOUTH AYRSHIRE
DUMFRIES AND GALLOWAY
SCOTTISH BORDERS
LOTHIAN
East Lothian
Midlothian
miles 0 10 20 30 40 50
kilometres 0 10 20 30 40 50 60 70 80
SERAD Drawing Office Edinburgh.
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